

Content Protection During 2020

What We've Learned in the
Post-COVID Streaming World

Who are we?



SHIFT



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VP - Strategic Initiatives

Agenda

- Macro Trends in Video Piracy
- What our data tells us
- What our customers are saying
- The future of content protection

Overall Industry Trends

Consumption

40% increase in entertainment,
news and sports views in Q2

Password Sharing

42% of those 13-34 have shared a video service password with someone outside the house

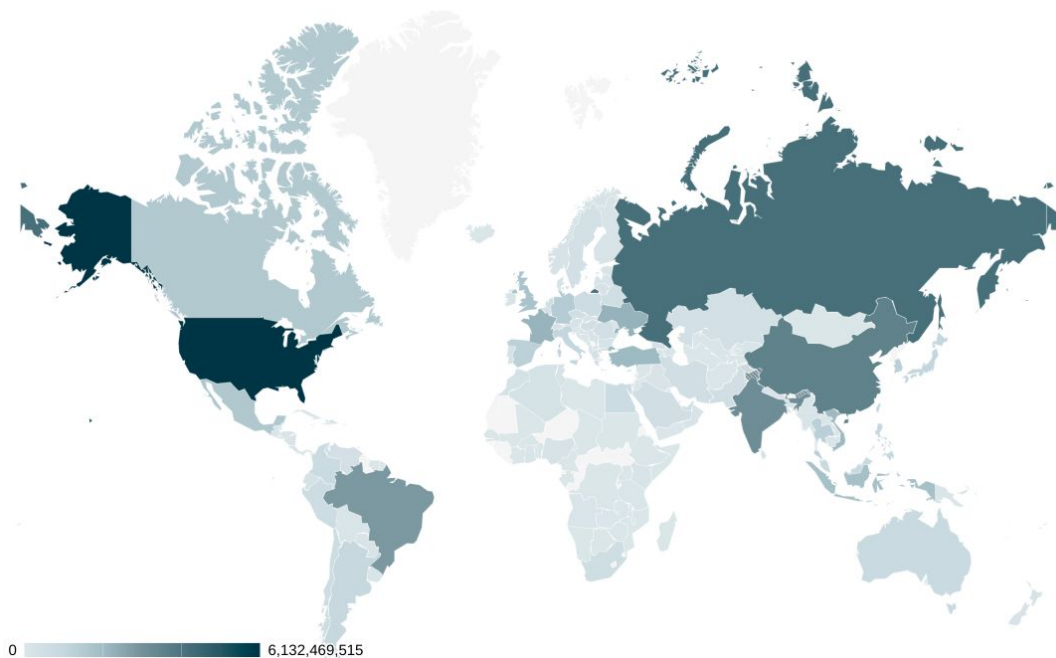
Piracy of Football in the UK



Piracy Activity

Total global visits to piracy sites Jan - June 2020 (68.3 billion)

USA	6.1bn
Russia	4.2bn
China	3.6bn
India	3.2bn
Brazil	2.8bn
Ukraine	2.2bn
France	2.2bn
Turkey	2.1bn
Vietnam	2.0bn
Indonesia	1.8bn



Operation Intangibles



MPA

CTAM



GIPC
GLOBAL INNOVATION POLICY CENTER

Increase in Investment

14%

increase in respondents saying
that are investing in content
protection

What our data is telling us

In the 7 months since the onset of
the COVID-19 pandemic in March....

Increase in Watermarking

66% increase in minutes of content
watermarked vs. last year

Increase in Credential Sharing

150% increase in credential sharing

Increase in Interest

346% increase in leads for our
content protection products

What our customers are telling us

User Stories

- I'm a movie producer seeking to protect critical pre-release content from piracy.
- I'm an agency helping my Fortune 500 client with A/V needs for internal communications and training, and I need a way to mitigate leakage of sensitive content.
- I own a learning and development service and need to protect my most watched content from being leaked.

Reason 1: Reputation Damage

60% of respondents

Failing to protect your content can lead to loss in brand trust, ruined campaigns and diminished viewership.

Reason 2: Revenue Loss

53% of respondents

Global revenue losses from digital piracy are up to **\$97.1 billion** for the film industry and up to **\$95.4 billion** for the television industry.¹

Reason 3: Control Over Intellectual Property

53% of respondents

The domestic value of stolen intellectual property is up to \$250 billion annually.

Most Valued Content Protection Measure: Visible Watermarking

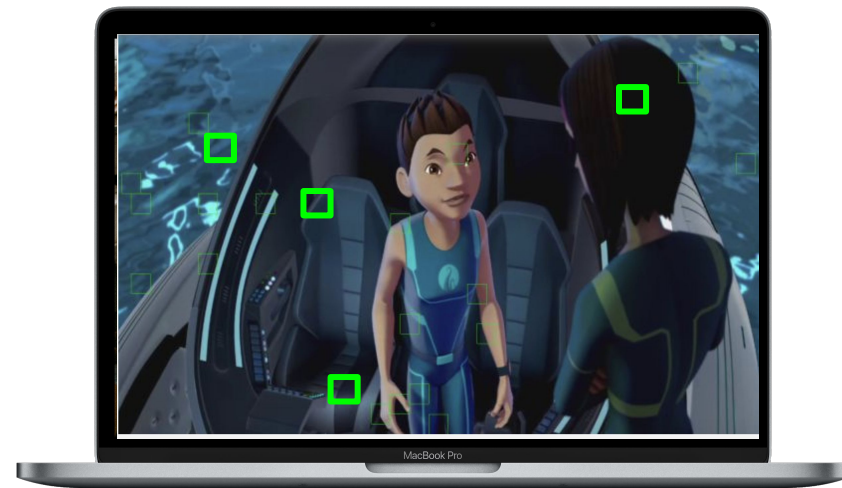
60% of respondents

Case Studies

Use Case

Major media conglomerate using many content protection and anti-piracy technologies for pre-release content

- Major motion pictures
- Live sports
- Premium programming



COVID Insights

- Potential new holes and needs due to WFH: get educated on what's out there
- Ensuring efficient use of content protection resources
- Using piracy data to inform content protection spend
- Desire for increased simplicity, functionality for screenings

Use Case



TOUCHSTONE RESEARCH
INNOVATION & EXCELLENCE

How Customers Benefit

- Security and peace of mind
- Test content with a national/global audience
- Leverage insights to create, produce, distribute and market content

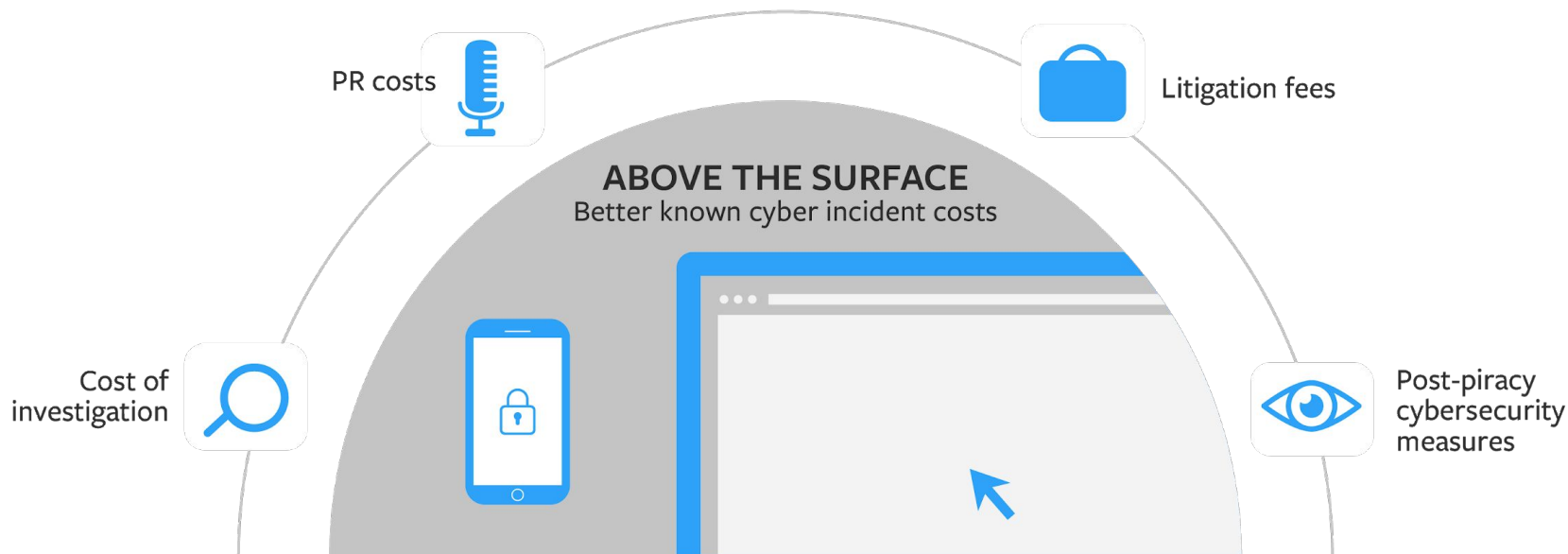


What are the right mitigation strategies going forward?

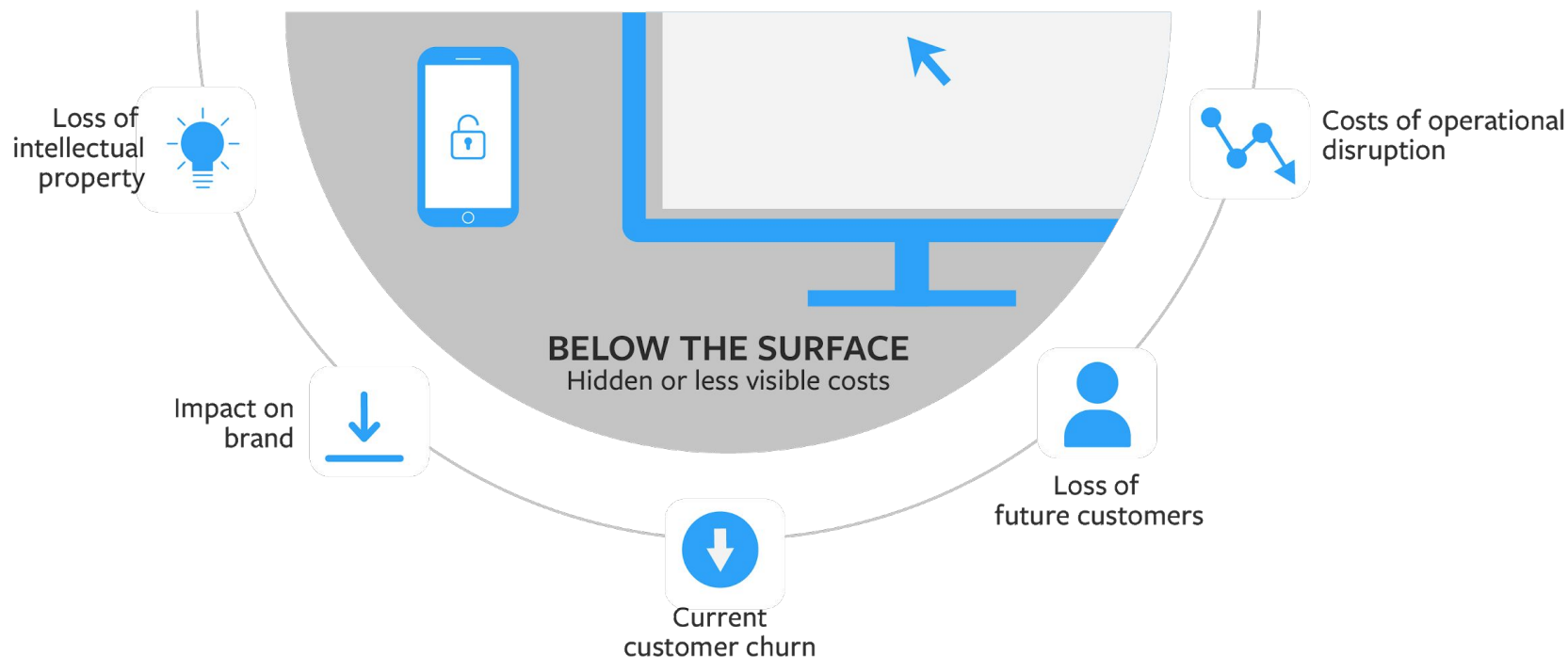
Content Protection + Anti-Piracy Options

<i>Stage</i>	Production	Distribution	Post-Incident	Market Intelligence
<i>Solutions</i>	<ul style="list-style-type: none">• Visible Watermarking• Forensic Watermarking	<ul style="list-style-type: none">• Token-based authentication• Encryption• DRM	Notice/Takedown	Piracy intelligence platforms

Known Piracy Costs



Unknown Piracy Costs



Takeaways

- Understand the macro-level issues
- Monitor your content library
- Use prevention and detection measures up front
- Consider all relevant datasets to continually hone your strategy

Thank You!

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