



# Content Protection **SUMMIT**

## Piracy in a Post-Pandemic World

December 16, 2021

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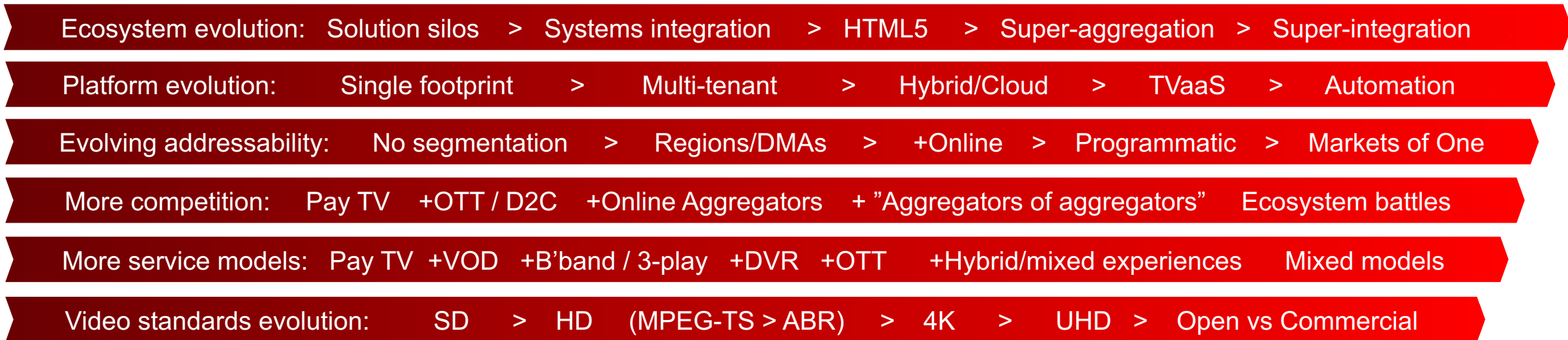
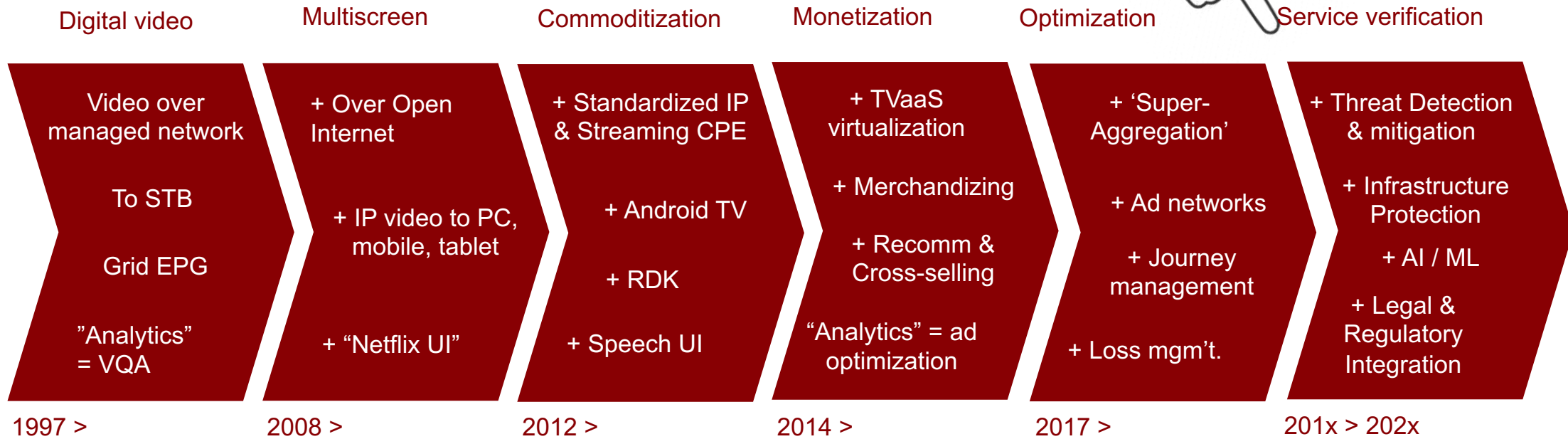
**Piracy Monitor**

STAY SAFE

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# Media technology: Evolution and Trends

We Are Here



# Video piracy: How big is it?



- **\$29 Billion** lost to the US economy in 2018, due to global video piracy (US Chamber of Commerce, 2019)
- **During COVID**, 66% of Americans said they watched more (Digital Citizens Alliance 2021). Britons' streaming consumption doubled (BBC 2020)
- **One fifth of Americans** said they visit pirate Web sites, and 10% have an illegal streaming device with apps in their home (DCA 2021)
- **91.3%** of the consumption of *A Quiet Place, Part II* was via unlicensed streaming Web sites (Muso, 2021)
- **2022: >\$66B** in revenue to pirates (Parks Associates, 2020 est.)
- Pirates reaped more than **\$1.3 Billion in annual revenue through ads** on illicit streaming apps and Web sites (DCA & White Bullet, 2021)

# Where Piracy (Theft) Happens

## Unprotected

### Before Distribution

Vulnerable to theft:

- Live sports, events
- Original Programming
- Digital cinema
- Production copies

## Vulnerable to Attack

Legal distribution

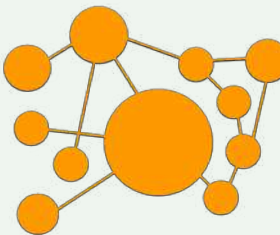
Pay TV/DVB (CA/CAS), Streaming (DRM)

Production & Packaging

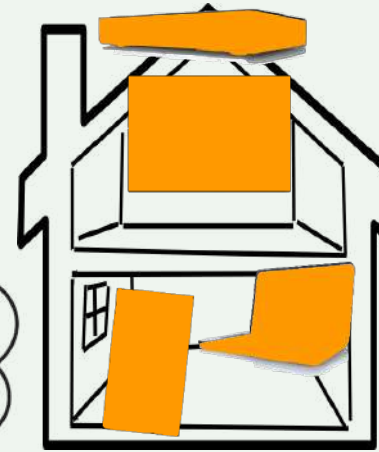
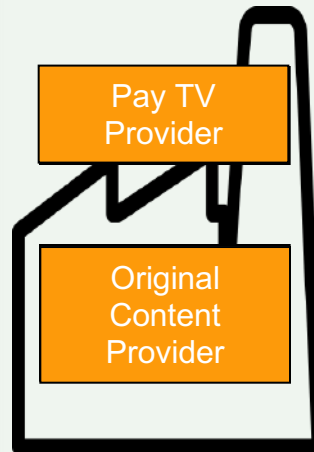
Distribution

Authentication & Playback

via Managed Network



Via Open Internet



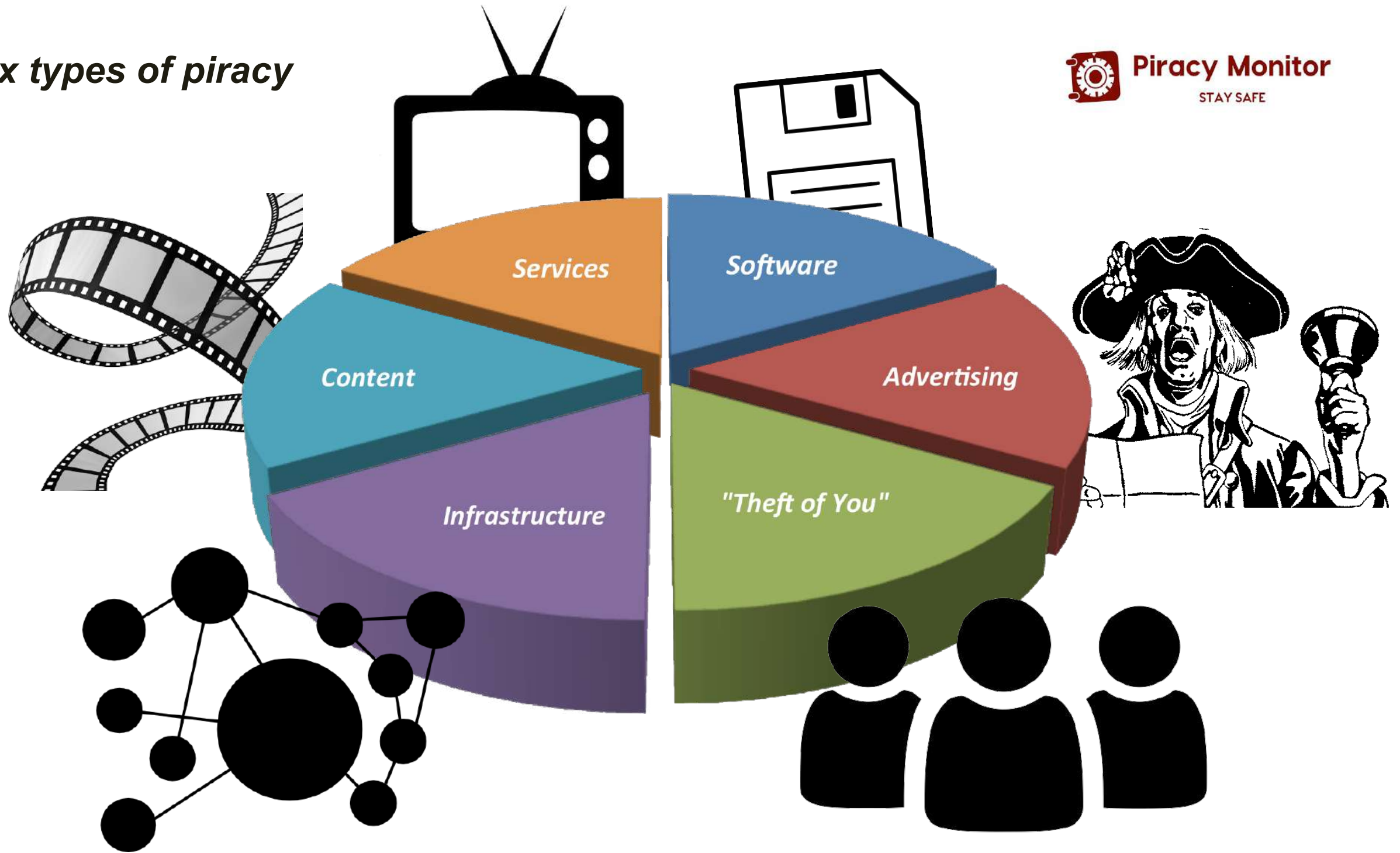
## Unprotected

### Beyond the consumer

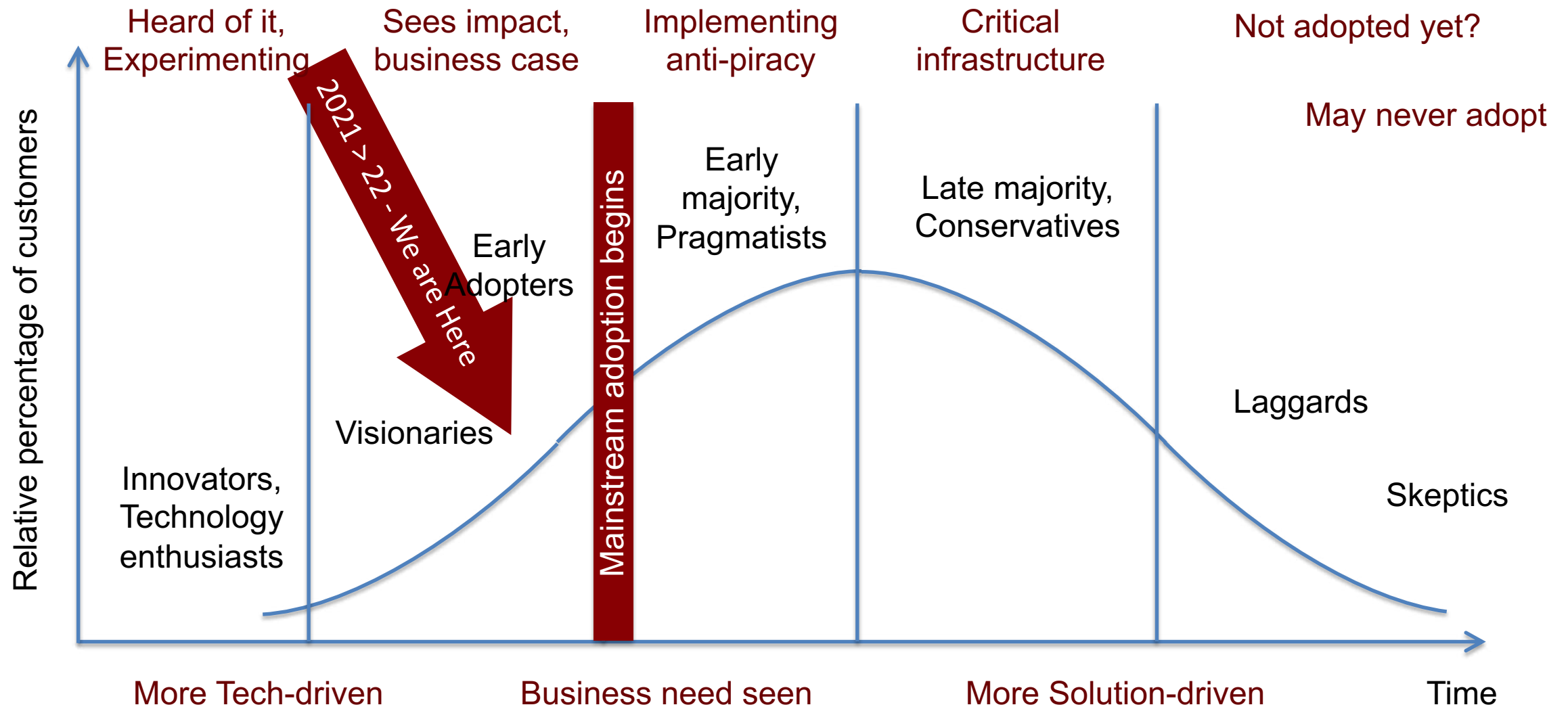
Vulnerable to theft:

- Live streamed events
- Series programming
- Cinematic releases
- Personal information
- Software integrity
- Device integrity

# Six types of piracy



# Piracy awareness / Anti-piracy category life cycle



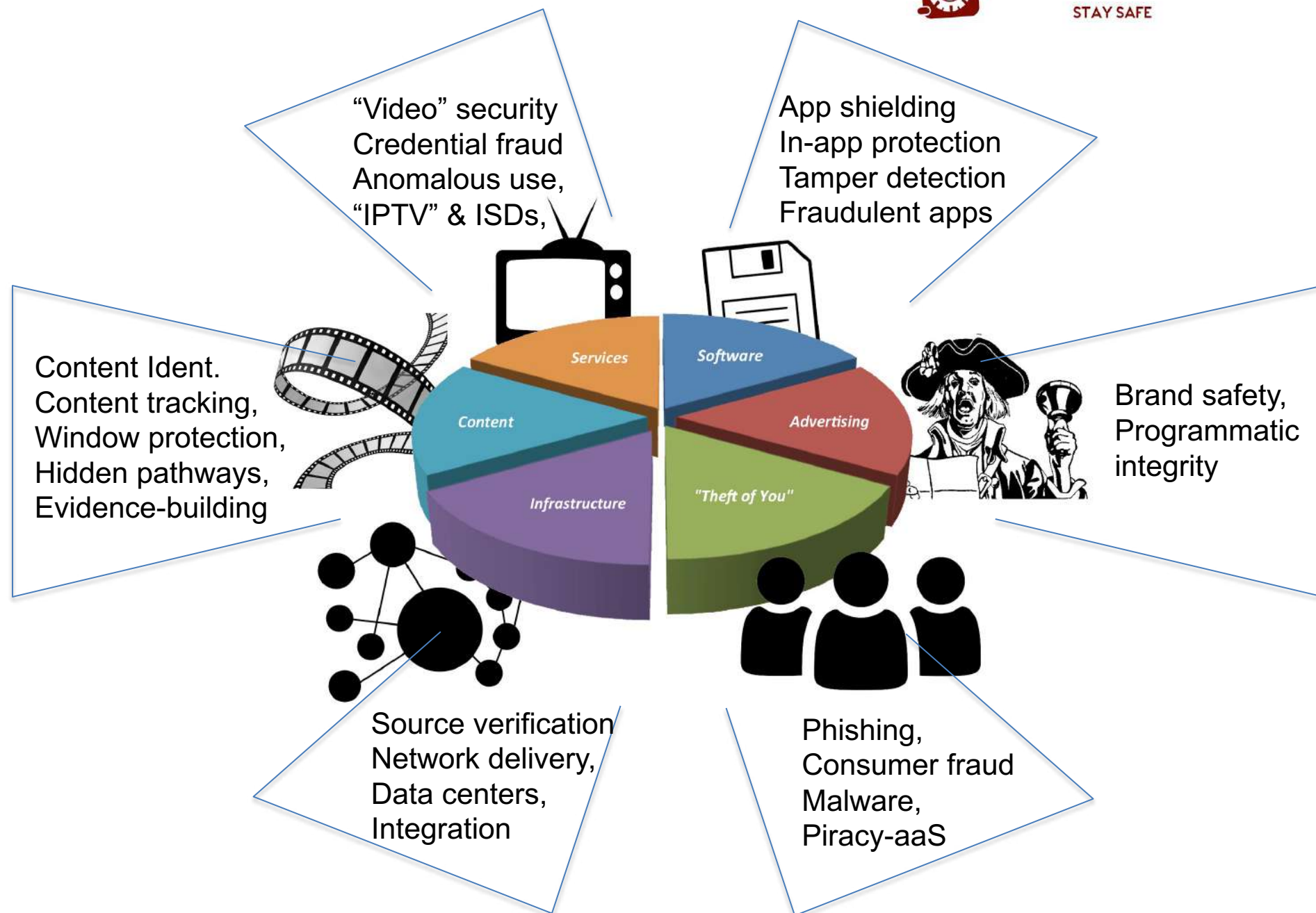
"Inspired by" Geoffrey Moore, Crossing the Chasm

# What should we care about?

## Who should care?

- Media creators
- Legal (distribution)
- “Internet community”
- Industry Associations
- Law enforcement
- Legal (infringement)
- Court system
- Regulatory & Legislative
- Regional & International
- Tech. Standards
- Best-practices

**Yes, it's a team sport**



# Ways to fight video piracy

## **Technical countermeasures**

- Enforcing service parameters (Business rules)
- Security audits (Existing CAS, DRM)
- Content identification, monitoring (Anomalous usage)
- Infrastructure (Systems integration, source verification)
- Programmatic advertising audit, verification
- Consumer-side (Device protection, software protection)

## **Non-technical countermeasures**

- Marketing (consumer-facing offers)
- Consumer education (risks, personal steps)
- Distribution partners (transport, online, search, social)
- Financial partners (anti-fraud)
- Industry partners (M&E peers & Industry orgs.)
- Law enforcement (Police), Judicial (Court systems)
- Governmental (Legislative, Regulatory)



# Take-aways



- **Audit existing security infrastructure**
- **Understand, validate sources and destinations**
- **Dedicate a piracy/anti-piracy resource, make them accountable**
- **Understand the threat(s), draft and iterate a policy**
- **Develop dedicated piracy detection and mitigation infrastructure**
- **Embrace the cloud – not just for production**
- **Partner for success**
  - Industry peers, your suppliers
  - “Internet” partners (search, social media, hosting, transport)
- **Make new friends**
  - The Legal Department
  - The Police, Your Congressperson, Government agencies, Copyright experts...



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