MESA Content Protection Summit

Data Market Issues

Lack of accurate data makes it **hard to track the value, scale and reach** of enforcement activities for unlicensed digital content.

Limited universal data sources means missed opportunities across **hidden markets and content**.

Difficult to quantify and qualify content demand in **under-reported markets**.

Independent research shows piracy audiences are highly engaged consumers of content. The University of Amsterdam used a **sample of 35,000 individuals across 13 countries in Europe, North America and Asia**. Their findings indicate piracy audiences are significant consumers of unlicensed and legal content.

"...there is little difference between pirates and legal users in level of education or employment status...the large difference lies in media consumption by pirates versus non-pirates...**almost every person who used illegal sources in the past year to access films or (TV) series also used legal channels in that period**.

...pirates and legal users are largely the same people: **demographically, pirates resemble legal users quite closely**...More importantly, for each content type and country, **95% or more of pirates also consume content legally** and their median legal consumption is typically twice that of non-pirating legal users.

Source: Global Online Piracy Study, University of Amsterdam Institute of Information Law (IViR), July 2018
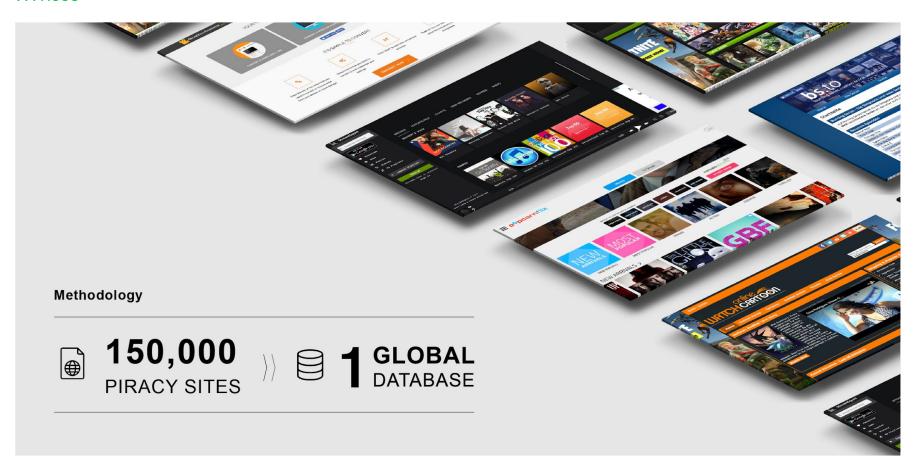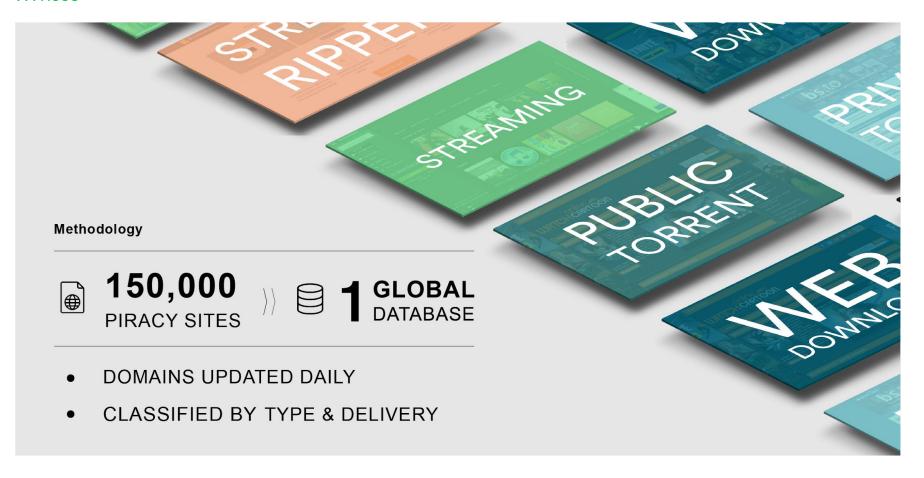
Why do people consume unlicensed content?

The IViR research also reported the primary reasons why pirates streamed film and TV series from illegal sources. Their finding shows that **price, quality, availability and ease of use are paramount in pirate's decision making**.

Primary reason for streaming film and TV series from illegal sources

Other	9%		Ease of use	18%
Ease of adding films or TV series to my collection	1%		Non-availability through legal channels	13%
I am unlikely to get caught	3%		The quality of sound and vision	16%
Speed or reliability	4%		It was the first site I found	7%
Availability or ease of subtitling	3%		The price	30%

MUSO

Methodology

150,000
PIRACY SITES

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1 GLOBAL
DATABASE

MUSO

STREAMING

RIPPER

DOWN

PUBLIC TORRENT

PRIV TO

WEB DOWNL

Methodology

150,000
PIRACY SITES

1 GLOBAL DATABASE

- DOMAINS UPDATED DAILY
- CLASSIFIED BY TYPE & DELIVERY

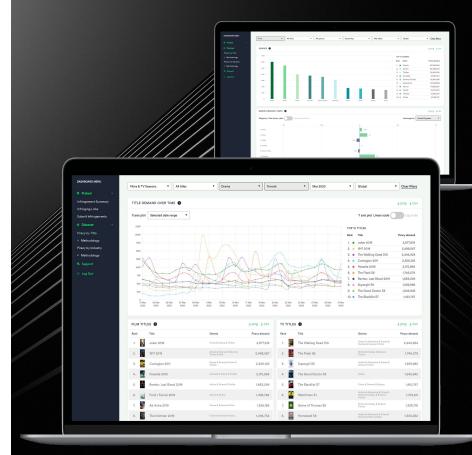Measuring unlicensed downloading and streaming consumption of over **360,000 film and TV titles globally**.

Daily data from over 5.6 billion downloads and more than **58.6 million streaming pages**.

Access global data unrestricted by geography or licensing to reveal **hidden demand and revenue opportunities**.

Uncover **sleeper hits and content insights** through comparative indexing of titles and genres.

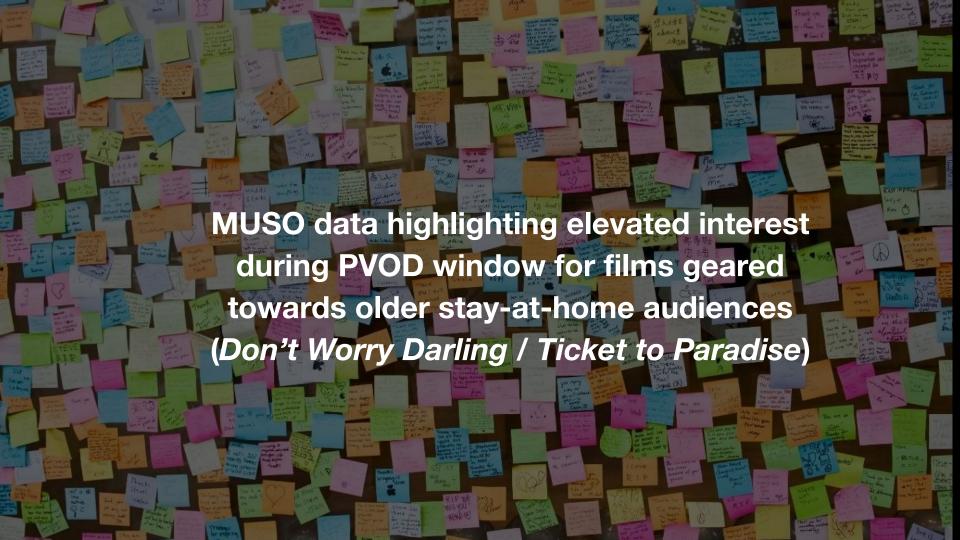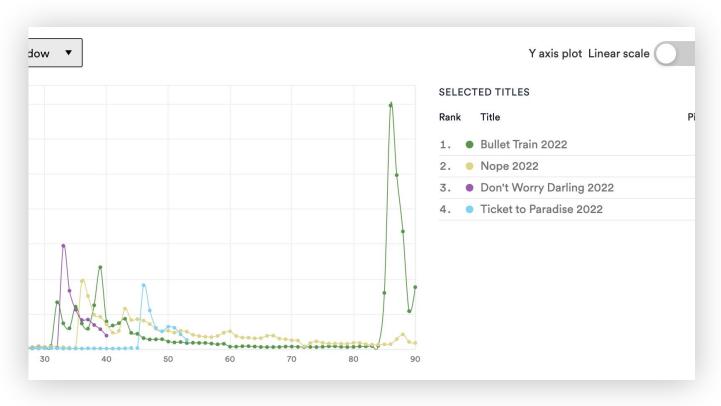Increase the **value of second window sales** by measuring demand in traditionally data poor markets.
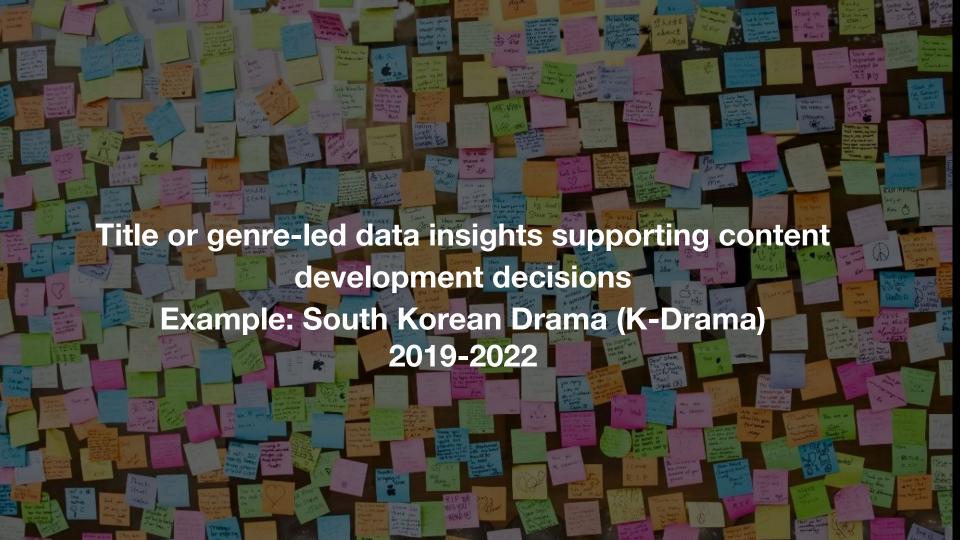
Unlicensed demand for film & TV content in 2022
105bn consumption visits globally to Oct 31, 2022.
22.9bn visits in the US, 93% via streaming video.

MUSO data highlighting elevated interest during PVOD window for films geared towards older stay-at-home audiences (*Don't Worry Darling / Ticket to Paradise*)
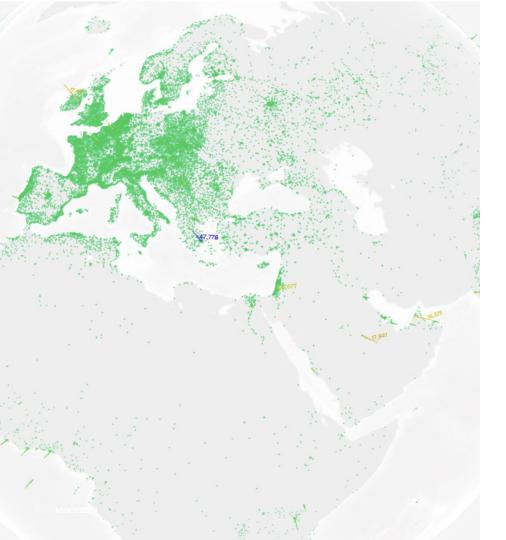
PVOD Demand Window View

Comparing unlicensed demand for different film genres during the 30-45 day post release PVOD window

Title or genre-led data insights supporting content development decisions
Example: South Korean Drama (K-Drama)
2019-2022

K-Drama Goes Global

"Regionality and originality is becoming more and more important for global audiences. K-drama 'Hotel del Luna' is a perfect example of this – a breakout hit and a buzz show at MIPCOM, which is indexing high for awareness, engagement and fandom within young demographics. MUSO's genre data for global demand supports this trend."

MUSO, 2019

K-Drama Goes Global

January 2021 revealed that True Beauty was the most in demand unlicensed streaming TV series globally. True Beauty is a South Korean TV show about a high-school girl who transforms herself into a goddess after being bullied.
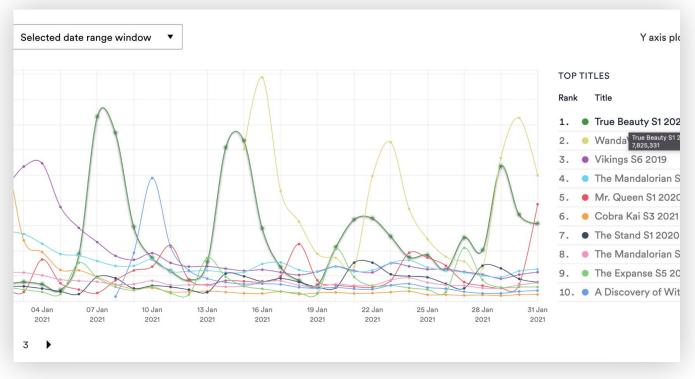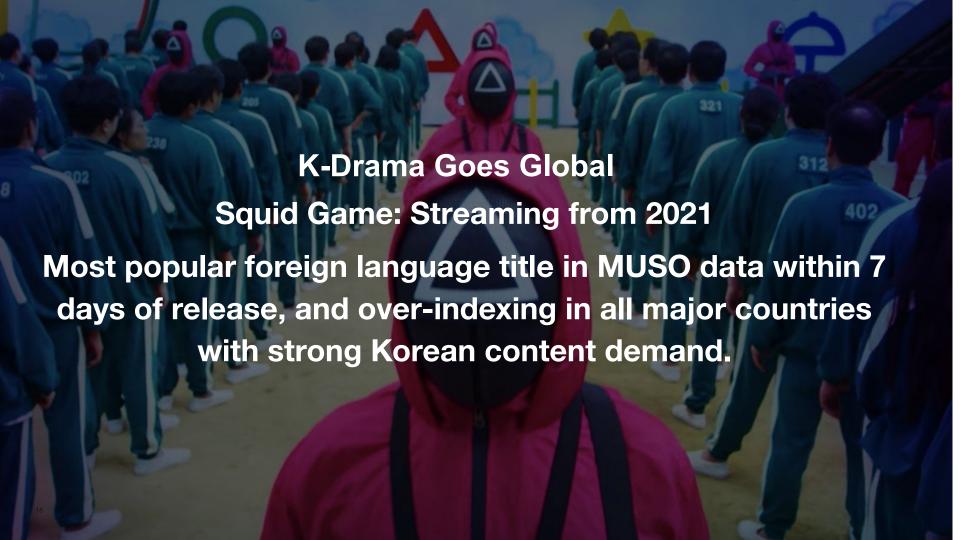
K-Drama Goes Global

Demand for True Beauty was 77% higher than any other TV series in January and reflects a global trend of interest in South Korean culture.

K-Drama Goes Global

Mr. Queen, another South Korean TV show, appears 4th in MUSO's global streaming data for January 2021. Like True Beauty this show was originally aired on the South Korean cable channel tvN. The first episode of Mr. Queen was broadcast on December 12th with the final episode airing on Feb 14th 2021.

K-Drama Goes Global

Squid Game: Streaming from 2021

Most popular foreign language title in MUSO data within 7 days of release, and over-indexing in all major countries with strong Korean content demand.

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