



Synamedia

Real-world options for operators and rights holders

Tackling sports piracy in an IP world

AMPERE
ANALYSIS

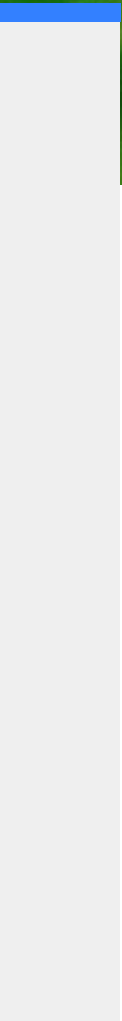


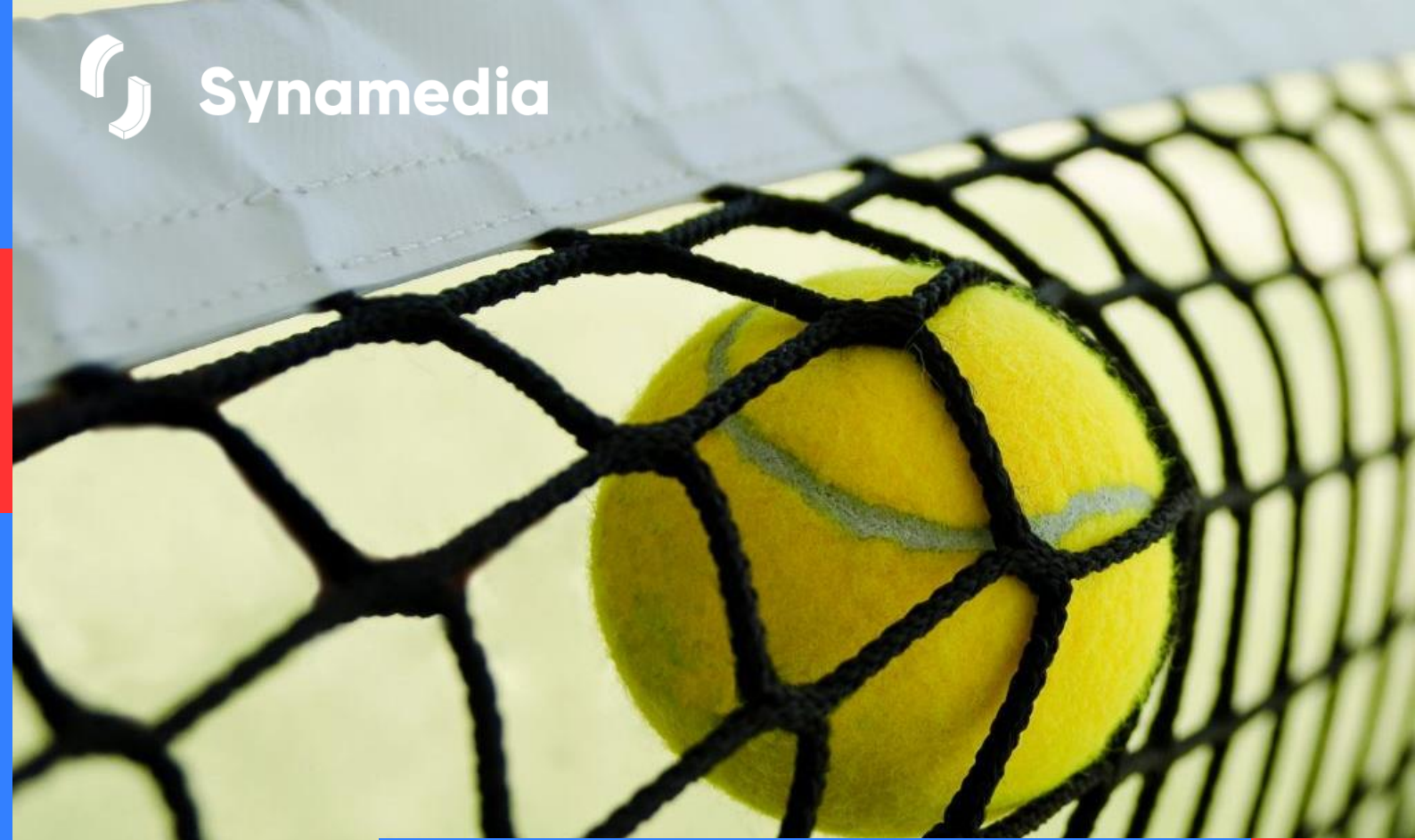


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1.0 Summary

The scale of illegal consumption of live sports is staggering. Among the most-engaged fans who watch sport every week, 83% access illegal pirate streams, primarily via internet-based IP streaming.

With more than half of all fans regularly watching sports content from pirate sources, the industry faces a pressing challenge to reduce illegal consumption and protect the value of sports rights.

Building on further analysis of research on the behavior and

motivation of more than 6,000 sports fans in ten countries carried out by Ampere Analysis, this report presents an evidence-based approach to tackling sports piracy.

It includes strategies for converting consumers of illegal content into paying subscribers, and a roadmap for all players in the value chain to focus on anti-piracy interventions that are tailored to the motivations and behaviors of each distinct group of consumers.





“We’ll never eliminate piracy—it’s about making it such a pain in the neck that it’s easier to pay for content”.

—Pay TV operator—



Multiple ways to address the piracy challenge

Summary: key findings

Sports rights owners and pay TV platforms have a number of opportunities to reduce illegal consumption of sports content, many requiring only small changes to working practices, among them:

- **Understanding the motivations** of the large proportion of engaged fans who “top-up” their legitimate pay TV service with illegal content.
- **Using effective anti-piracy technology and legal action**, monitoring and intelligence to disrupt pirate streams—losing a game mid-match is feared by nearly all fans, especially those paying for illegal internet-delivered sports streaming, leveraging legal action to take down illegal services bolsters this impact.
- **Applying anti-piracy measures equally** in every market, avoiding leaving a “weakest link” platform to become the source of pirate streams elsewhere.
- **Maximizing collaboration** between rights holders, broadcasters and platforms—sharing responsibility for implementing and enforcing anti-piracy measures.
- **Addressing economic triggers** prompting consumers to use illegal content services with pay TV product and pricing innovation, such as “day passes”.
- **Addressing availability and usability triggers** with multi-screen and OTT-only access, and bundling deals to minimize rights fragmentation and maximize the reach of legitimate content on every screen.



83%

83% of sports fans (watching sports at least weekly) access illegal pirate streams weekly

10% of all sports fans are watching illegal services every week yet not paying for a legal service



10%

47%



47% of the lowest-income fans first used illegal services because they did not want to pay anything to watch a sports event



66%

66% of the youngest fans claim they first started using illegal services because legitimate access was too expensive

65%



65% of those who lend otherwise-legitimate pay TV account credentials to others also access pirate sites at least weekly

71% of the heaviest users of illegal content find out how to access pirate services from YouTube videos

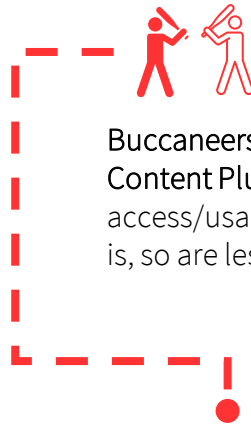
71%



Understanding what drives each group to start pirating

Summary: drivers of piracy

Each group of sports fans has different motivations for accessing illegal content services, with drivers ranging from economic, availability and usability. Understanding the motivations of each group will help to optimize responses to illegal content consumption.



Fickle Superfans —31% of fans

These younger sports fans typically pay for sports and access pirate services as well. The **Internet Buccaneers** sub-group is motivated by cost of access, while **Content Plunderers** are slightly more driven by ease of access/usability. These sports superfans know where the content is, so are less likely to be driven to piracy by availability issues.

Reasons for pirating

Economic
Availability
Usability

	Treasure Seekers	Internet Buccaneers	Content Plunderers	Silver Islanders	Ocean Explorers
Economic	x	✓	~	x	x
Availability	✓	x	x	✓	~
Usability	~	x	~	~	~



Loyal Stalwarts —26% of fans

These core sports fans are willing to pay for content, and are more likely to turn to piracy when the events they want to watch aren't readily available from their main TV provider or on their mobile device.



Casual Spectators —43% of fans

Among these casual, typically older, fans, motivations for piracy vary. Neither sub-group is driven by price, but the **Silver Islanders** sub-group is lured by illegal content when an event isn't available on their regular TV platform.

Read more about the behaviours and attitudes of each sports fan segment in our first report, found [here](#)

Note: Economic triggers relate to behaviors driven by an unwillingness to pay for sports or events; Availability triggers relate to the breadth of sports content available through legitimate sources on a device of choice; while Usability triggers relate to fans who believe pirate services are easier to use than legitimate alternatives.



2.0 The requirement for a cross-industry approach

“Everyone thinks it’s someone else’s problem,” is a frequently-heard complaint from industry professionals focused on fighting piracy. Those who invest time and resources tackling illegal content fear their efforts will be undermined by others who are less diligent.

In a connected IP world, it only takes a single poorly-protected platform in one country to become the source of a globally-distributed pirate channel.

And there is no single magic

bullet. A wide range of incentives and deterrents is needed to disrupt pirate providers.

The effectiveness of these interventions is maximized if they are based on a detailed understanding of each individual segment of sports fan.

And crucially they require close collaboration between every player in the value chain—from sports rights holders to technology providers.





“Just because we are secure, all the platforms with rights need to be. Pirates have backup options and can immediately switch to another source”

—Sports rights holder—



Consumers fear disruption & consequences of using illegal services

Assessing effective deterrents



Many legitimate paying TV customers are not getting all they need from their primary pay TV provider. More than half (56%) of fans who watch sport at least once a week and subscribe to premium sports channels, or sports OTT services, are also “topping up” by accessing pirate streams. This jumps to more than 90% of the most engaged **Fickle Superfans**.

In addition, nearly a quarter of fans viewing illegal streams weekly do not pay for any legal sports content, rising to more than half of the **Casual Spectators**.

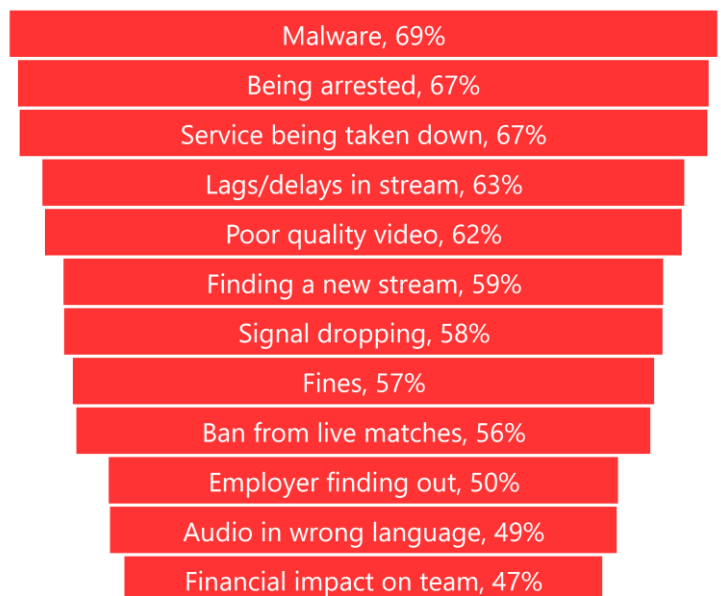
Widespread illegal viewing by fans doesn’t mean there aren’t things that could deter them:

- Nearly all fans (84%) fear disruption of their stream. If pirate streams become so unreliable that consumers no longer trust them, they will be less likely to turn to illegal providers.
- Trying to “educate” consumers not to use illegal content will almost certainly fail—unless it’s done in a targeted way. That’s because three quarters of all sports fans already think piracy is morally wrong, and the 25% who don’t tend to fear the consequences far less.
- Even so, 84% of sports fans using illegal services say they would stop or reduce their use if they faced the risk of legal and social consequences (such as being arrested or fined, an employer finding out, or ending up with malware on a device). These concerns are most common among the **Loyal Stalwart** fans.

Specific issues which would dissuade users of pay and free services (%)



Specific issues which would dissuade users of free services only (%)



Deterring password sharing and VPN use is important

Addressing account sharing



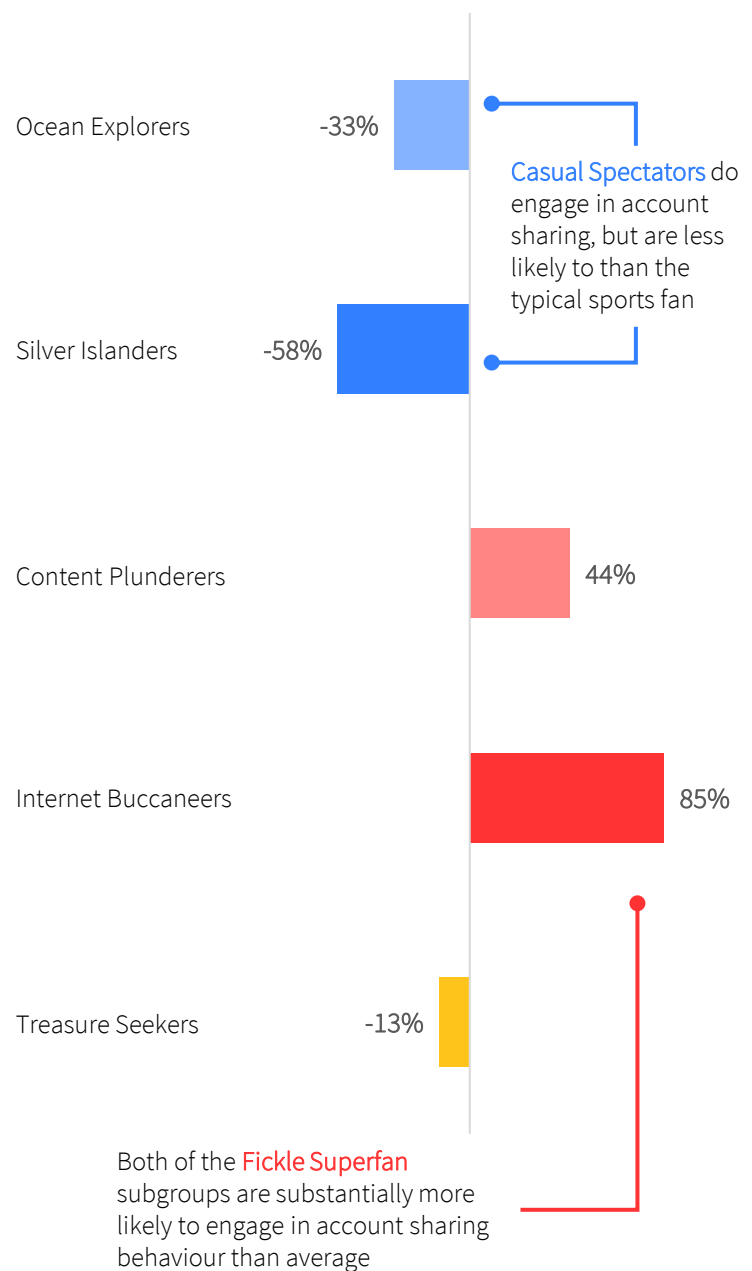
Discouraging subscribers from sharing their account credentials with friends and family, and from using VPN services to access streams from another country,

is an important part of deterring the use of illegal content streams.

- More than one-in-five of all sports fans say they share passwords with people outside their household, rising to one-in-three Internet Buccaneers.
- There is a strong correlation between consumers indulging in password sharing and those who regularly access illicit sports streams.
- 65% of those who lend otherwise-legitimate credentials to others also access pirate sites at least weekly.
- 20% of sports fans who never access other forms of illegal content still engage in account sharing.
- Paid illegal content consumption is far higher among VPN users. 61% of VPN users pay for illegal sports streaming. The rate is much lower in homes not using VPNs.
- Those consumers who share credentials are significantly less concerned by the legal consequences of using pirate streams than other sports fans.

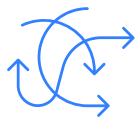
While there's no evidence to suggest that reducing credential sharing or VPN use would automatically reduce other forms of illegal content consumption, it is leading to a direct loss of revenue for platform operators and creates an easy entry point to other forms of illegal viewing—yet is readily addressed through content protection technology.

Likelihood of consumer segment sharing account (% from average)



Fighting piracy is only as good as the weakest link

Adopting a unified approach



Fighting illegal content consumption by disrupting pirate streams is one thing that can readily be controlled by rights holders and platforms. But to be effective, a combination of monitoring, intelligence, legal action and technology to identify and take down offending pirate services is needed—in as automated and efficient a way as possible.

And to maximize the success of this approach, it's important for all players in the market to adopt similar standards.

With streaming piracy there is no direct connection between the location where consumers are watching illegal streams and the country where those illegal streams are generated. Pirates are even adept at mixing video from a weakly-protected source with audio from a premium market. Yet many players are still focusing on protecting individual platforms, and some rights owners are inconsistent in the content protection requirements they require of licensees.



Mandating technology like forensic watermarking only in certain markets can result in the source of pirate content being pushed elsewhere.

A balanced approach means tackling all forms of piracy equally:

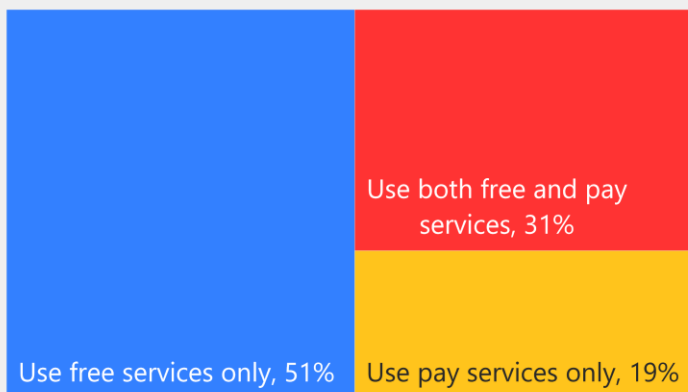


Cutting off the source of content for the professional criminals who run IPTV systems is crucial given that paid-for IPTV apps or streaming devices are used by 22% of all TV-watching sports fans, rising to 65% of **Internet Buccaneers** and 40% of **Content Plunderers**.

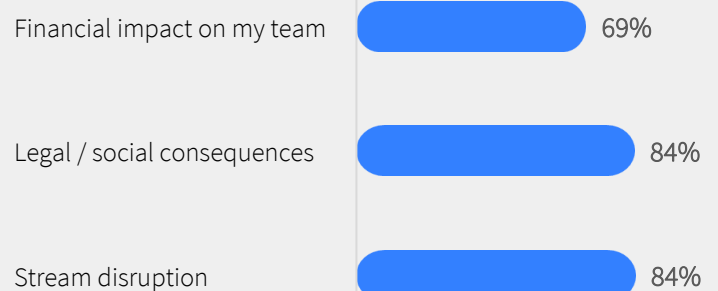


Issue rapid mid-game takedown notices for social media and user-generated streaming services to cut off the free-to-view pirate content favored by fans like **Loyal Stalwarts** and price-conscious fans in mid-income markets.

Free vs. pay users of illegal content services (%)



Top deterrents for those using pirate services/streams (%)



Presenting a united front across the industry is crucial

Looking at industry standards



Sports rights owners need to enforce a common set of standards for content protection across all the channels and platforms licensing their content to create the level playing field needed to fight piracy effectively.

Many rights holders now recognize the importance of this strategy, often motivated by their own direct-to-consumer strategies and a recognition that illegal digital content is competing with attempts to grow new digital business models.

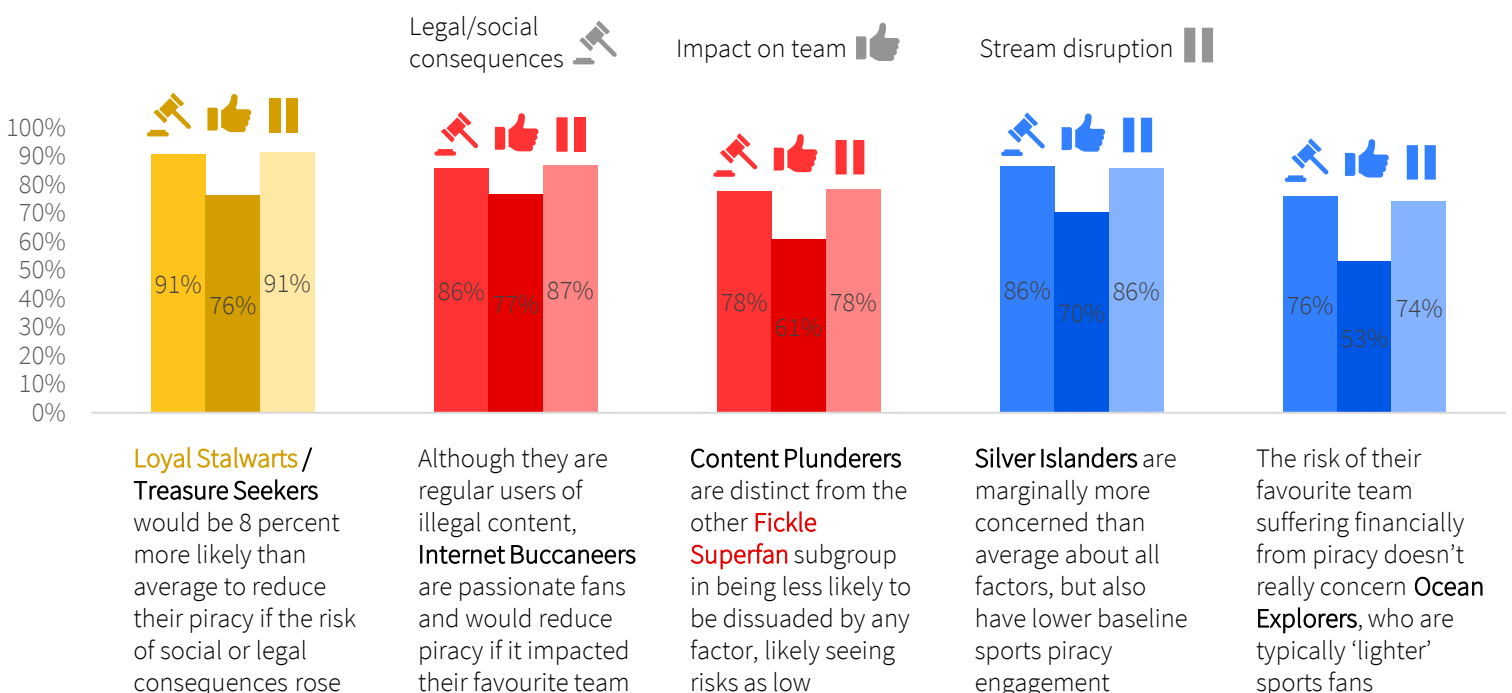
In response they are imposing stricter contractual requirements for content protection on licensees and investing in their own monitoring and intelligence activities. As Piracy directly impacts Sports Rights values and distribution, more and more rights owners are no longer just leaving the responsibility of tackling piracy to their broadcast partners, they're taking a proactive approach to

combatting piracy and protecting their rights values now and to invest for future growth.

While this was a valid strategy when cable and satellite Conditional Access System (CAS) smartcard piracy was the main challenge, this approach carries risks for the long-term value and integrity of their rights.

Crucially, as we showed in the first report of this series, it is the most engaged sports fans who are most likely to view illegal sports streaming services as well as paying for legitimate premium sports channels or OTT services.

Most important factors in reducing piracy
% of segment that would change behaviour





3.0 Targeted strategies for cutting sports piracy

“Make it harder than handbags,” is the memorable quote from one pay TV operator explaining its approach to reducing piracy. The theory is that if the criminals are sufficiently frustrated, they will turn their attention away from content piracy to other crimes like producing fake designer purses.

This requires a multi-pronged approach from all players in the sports value chain with carefully-targeted interventions. It means closing the incentives that can cause

consumers to turn to illegal providers in the first place, with effective rights licensing strategies and pay TV product development. It means using monitoring and intelligence to detect and take down illegal streams, degrading the experience for consumers.

And it means global collaboration among a wide range of industry players, from rights holders to TV channels to pay TV platforms, to Internet and technology companies.





“We aim to make it so unfriendly to criminals that they go back to fake handbags”

—Pay TV operator



Understanding the gateways to illegal sports content

Economic triggers for piracy



Understanding what first triggers consumers to seek out illegal content and taking away that initial incentive means fewer consumers will be tempted to stray.

These gateways to illegal content vary by geography and by the distinct clusters of consumers identified through consumer research. There are three key types of trigger for illegal content consumption: Economic, Availability and Usability.



Economic triggers—viewers who don't want to pay anything to watch a sports event, or don't value it enough to pay the price in their market. This is more complex than consumers simply expecting a valuable product for free.

- For those consumers in the very lowest income bracket in their country, affordability is indeed a factor, with just under half saying they first used illegal services because they did not want to pay anything to watch a sports event.
- The biggest consumers of illegal sports streams—**Internet Buccaneers** and **Content Plunderers**—are also the most engaged sports fans,

and most are already paying for premium sports channels or sports OTT services. But if their package does not include all the sports events they want to watch some fans may feel they cannot justify the cost of adding an additional subscription.

- Conversely, more casual sports fans—**Silver Islanders** and **Ocean Explorers**—who tend to watch occasional events like Olympic Games or the FIFA World Cup may feel they face an economic barrier if the only way to watch is by taking out a full premium sports channel subscription with a longer-term commitment.

“Customers can argue ‘I would pay for it if I could get it’—and that’s getting worse with fragmentation of rights”

—Pay TV operator—

Tackling the fragmentation of rights across platforms

Availability triggers for piracy



Availability triggers—consumers who believe they are unable to access the event from a legitimate provider in their market or on their device of choice.



Rights availability

- As sports rights owners have sought to maximize rights values and regulators have often required rights packages to be sold to more than one operator, the market has become fragmented.
- Rights owners have embraced new buyers entering the market, including OTT services and IPTV providers. But this means fans need more subscriptions to watch the games they want.
- Rights owners have focused on maximizing the value of their rights. But where this limits reach, the unintended consequence is reduction in the overall availability of a sporting event.
- Rights owners have sometimes failed to agree terms for every market with channels and platforms, leaving territory “black holes” that pirates fill.



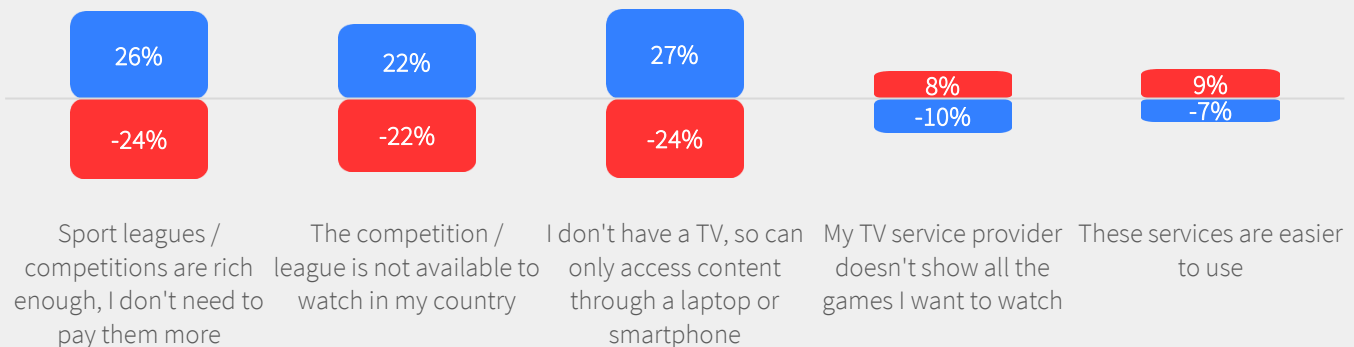
Platform and device availability

- Limiting distribution of sports only to traditional technologies like cable and satellite platforms means some consumers will be left without a legitimate way to access the content.
- An apartment-dweller, for instance, may be unable to use a satellite TV platform, and an increasing number of cord-cutters are switching to OTT-only access to content.
- Failing to offer effective mobile access or a TV Everywhere-style service leads pay TV customers wanting to watch away from home—such as on a mobile phone at work—to find alternative sources.

Relative importance of drivers for using pirate services
(% skew from average)

■ Pay for illegal content and watch free

■ Only watch free illegal content



Assessing the user experience motives for accessing pirate content

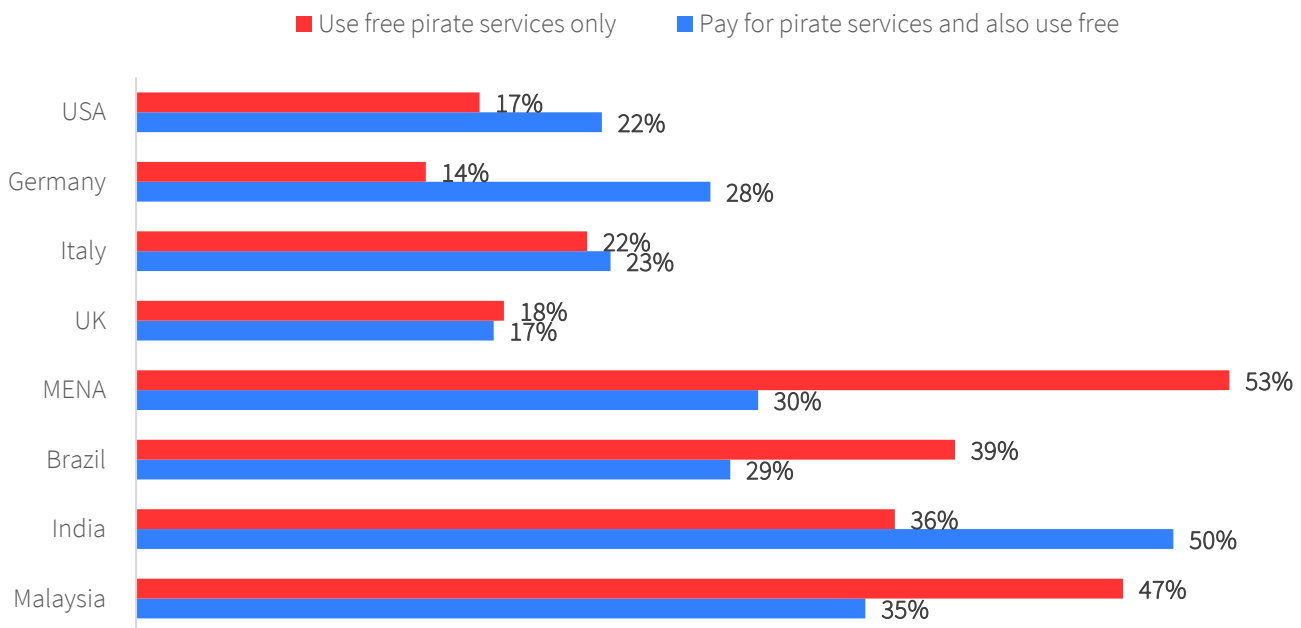
Usability triggers for piracy



Usability triggers

- Some consumers believe pirate providers offer a simpler and quicker experience than signing up with an established pay TV service, meaning a simple way to reduce illegal content consumption is to address service provision gaps.
- A cable or satellite product often requires booking a home visit from an engineer to install. The lead-time may be long and installation can be disruptive, or even impossible for younger sports fans renting or sharing accommodation.
- The same products normally involve a contract of at least 12 months to cover the installation cost. This can be a deterrent for people with flexible work and living arrangements.
- Many pay TV providers have invested self-service customer onboarding and in simple packages, but the offer from some providers in developing markets can be very complex.

Piracy Hotspots
% of sports fans using



Closing the gateways to illegal sports content

Pricing and access strategies

Rights owners and rights buyers can address each of the triggers systematically to reduce the risk of each segment of consumers seeking out pirate streams.



Pricing strategy: segment the market with flexible pricing models for access to live sports



Access strategy: ensure rights deals maximize reach across platforms and devices so sport is readily available to consumers

Incentives may not help with all **Fickle Superfans** and consumers in markets like MENA and Malaysia who are reluctant to pay to watch sport, but rights holders are increasingly adopting innovative strategies that broaden the reach of their products.

These approaches help reach the **Loyal Stalwarts** who don't want to commit to multiple subscriptions, and also the **Casual Spectators** who just want occasional access.



The NBA is transforming the way access to its games are priced with its OTT streaming product, NBA TV. Consumers can subscribe monthly or for the entire season, for a single game, or for audio commentary only. Flexible subscription management technology even enables access for a single team, or the final quarter of a game.

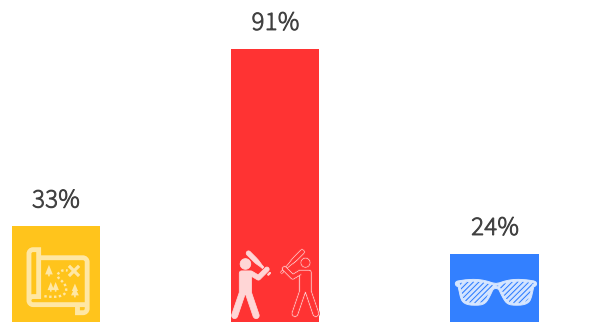


The French Football League sold "near-real-time" Ligue 1 rights to IPTV operator Iliad, for four seasons starting 2020. This will provide users of Iliad's Free service with access to slightly-delayed goals and other key action for every game.



European operator Sky offers flexible subscription terms to users of its NOW TV service, an OTT streaming video platform. Consumers can subscribe to the premium Sky Sports channels without needing a satellite receiver, and can pay on a monthly basis with no commitment, or even for a single day.

Have paid-for premium sports channels/OTT services and also access pirate sport services once a week or more



Loyal Stalwarts Fickle Superfans Casual Spectators

Managing rights fragmentation to reduce illegal consumption

Example of fragmented rights: Brazil



Brazil is a hotspot for illegal live sport viewing, with 88% of all sports fans watching pirate streams weekly. Sports fans in the country over-index for watching nearly every sporting event via illicit streaming services.

Fans in Brazil are far more likely than viewers in other countries to say they first turned to pirate providers because there was a sporting event unavailable by other means in their country.

They are more likely than most to excuse their consumption of illegal services by saying their main TV provider does not show all the games they want to watch.

With the lack of a “one stop shop” platform for the most engaged fans to access their choice of sports, many are turning to illegal providers instead.



“Most people will pay if it’s available. Where there’s the right service available at a reasonable price then piracy goes right down”

—International sports broadcaster—



Rights for key national and international sports, leagues and events are spread among at least 17 different broadcasters and platforms, ranging from local providers like Globo to international channels such as Eurosport and ESPN, OTT service DAZN, and social media platforms including Facebook and YouTube.

Brazil is one of the biggest soccer-loving nations, but the rights to the major domestic and international football leagues are also divided among 11 different licensees; 93% of regular users of illegal streams are soccer fans.

Closing the gateways to illegal sports content

Incentives and deterrents needed



One in ten of all sports fans watching illegal services every week is not paying for any legal sports service, but they can be deterred from consuming illegal content with a combination of incentives and deterrents.

- While **77%** of viewers who watch illegal sports services weekly also subscribe to sports pay TV channels or sports OTT services—almost a quarter (**23%**) of regular users of pirate streams do not otherwise pay for a legitimate service.
- The **Fickle Superfans** are most likely to ‘top up’ on illegal content in addition to their pay TV package, although the **Content Plunderers** sub-segment is likely to be ‘freeloading’ and pay nothing.
- Those who are freeloading are more likely to say they first used illegal services to access a specific event they didn’t want to pay for, while the top-up consumers are likely to say the price was too high.
- The top-up group has a willingness to pay for legitimate content, with **79%** of them believing piracy is morally wrong. These consumers can potentially be converted to higher-paying legitimate customers.
- These can be combined with action to identify, interrupt and take down paid-for IPTV services and disrupt their sources of funding. The same measures to interrupt IPTV streams will also make life more difficult for the freeloaders.

To address the users of pirate services these measures can be combined with:



1. Action to automate the takedown of social media streams.



2. Industry-level action to tackle user-generated content streaming platforms often hosted in markets like China and Vietnam that may not respond to takedown requests.



3. Action to address advertisers often unwittingly supporting these platforms.

“Big tech companies are in a difficult position; you can’t blame them. You can’t ask Google to remove all the piracy websites, that’s not the answer to piracy”

—Pay TV operator—

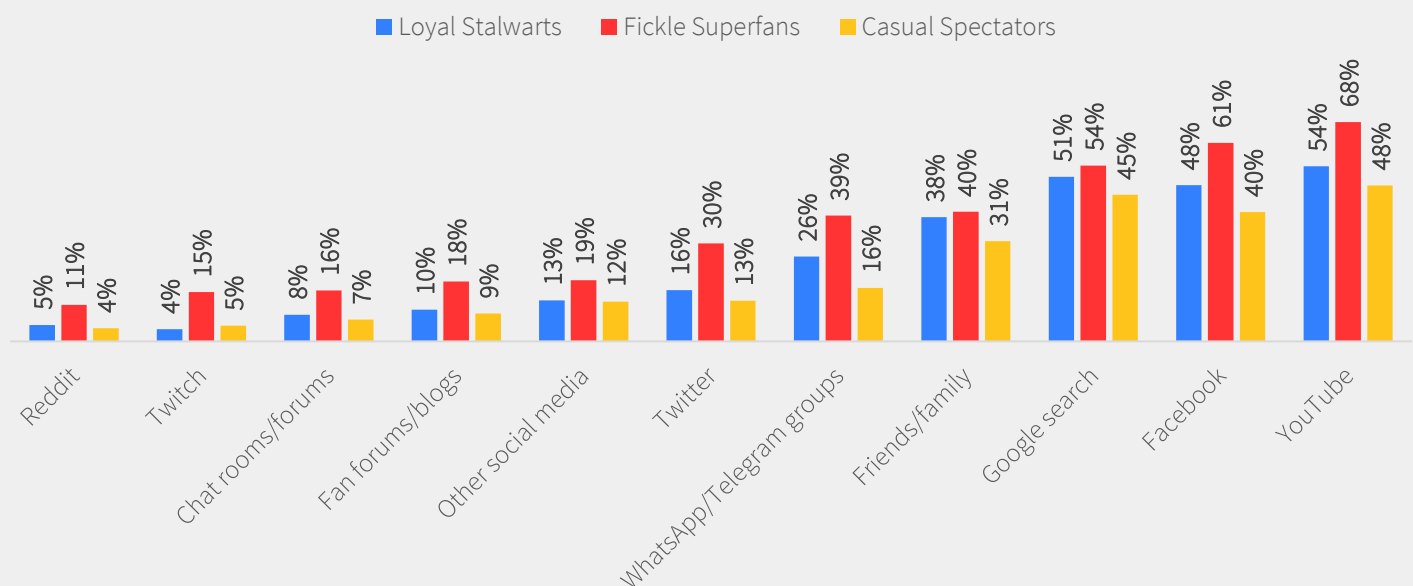
Closing the gateways to illegal sports content

Working with the tech firms

A wide range of global technology and Internet providers unintentionally enable and facilitate piracy. In some cases, this is near-impossible to address, but in others it can form an important part of content-protection strategy.

- **App stores**—illegal IPTV apps are often distributed via legitimate app stores, particularly those on smart TV platforms. Industry players need to actively monitor these and issue takedown requests rapidly.
- **Payment providers**—online payment providers will take action to stop processing transactions for pirates if they know about it. This also demands monitoring and prompt action to inform the payment platforms.
- **DNS and hosting providers**—some providers of DNS and hosting services appear to turn a blind eye to the use of their services by pirates, or champion Internet freedoms ahead of the rights of intellectual property owners. They often operate in lenient “safe harbor” jurisdictions. This is actively exploited by pirates and requires monitoring and considered legal intervention.
- **ISPs**—most content owners and platform operators accept there is little that ISPs can (or should) do to reduce access to pirates, other than implement legal directives to block access to certain IP addresses. Even within organizations, the interests of the (more profitable) broadband business normally override those of the pay TV division: no ISP wants to gain a reputation for “censoring” content, and all operate to a wide range of local-market regulations.

% of each segment who use method to locate illegal content



Closing the gateways to illegal sports content

Building protection into deals

Information sources about pirate services



Other potential interventions to tackle piracy might include trying to **reduce access to information** about how to access pirate sports streaming content.

It remains easy for the most casual sports fan to find providers of illegal sports streaming, both paid-for and free, via a variety of mainstream sources.

And viewers find it extremely easy to find and set up a new stream if one goes down: most take between just five and 15 minutes to find and set up a new source of illegal sports streaming, with 73% of consumers saying this takes under 30 minutes.

Many in the industry describe fighting piracy as a game of “whack-a-mole”, and this insight into consumers’ behavior reveals the challenge of trying to suppress pirate sports streams—and the crucial importance of doing this on a joined-up, global, industry-wide basis involving all players from rights holders to technology providers.

Negotiating content protection into rights deals



Some sports rights licensees are content protection measures directly into rights deals.

- They are creating an integrated team including business affairs, content protection strategists and technologists to negotiate rights deals based on a **full assessment of the risk of piracy** eroding the value of those rights.

Pirates still favor cable and satellite set-top boxes as the origin of their illegal services. In many markets, simple “zapper boxes” do not support watermarking (visual or forensic), and often have weak encryption that is easy to overcome.

These poorly-secured boxes are often effectively untraceable—reinforcing the critical importance of ensuring that all platforms carrying content meet minimum security standards.

In cases where more effective content protection technology is implemented on set-top boxes, there is anecdotal evidence that the source of pirate channels can be pushed to IP/OTT streams.



4.0 A consumer-focused approach to piracy

A combination of incentives and deterrents is needed to persuade more consumers to convert illegal viewing to legal. A mix of technical, intelligence and monitoring activities can cut off pirate content at source, disrupt the pirates' operations, and frustrate consumers experience of illegal viewing to the point that they turn away.

And it includes enhancing legitimate products based on individual motivations for accessing illicit content in the first place.

A checklist of measures is provided as the basis of an effective strategy to reduce piracy. The most effective strategy is for rights owners and distributors to work together—for example combining monitoring and intelligence with watermarking and leakage disruption technologies.

Done right, this approach starts to turn a problem into a revenue opportunity: with consumer research revealing the vast majority of sports fans being willing to pay for content.





*“Exclusivity creates scarcity, which
leads to piracy”
—Pay TV platform operator—*



An agenda for a consumer-centered approach to reducing piracy

Checklist for sports rights owners

Industry leadership

- ✓ Take proactive ownership of content protection, don't leave it up to licensees
- ✓ Create a baseline of content protection requirements mandatory for all licensees
- ✓ Decline to license rights to any platform unable to meet these minimum requirements
- ✓ Work collaboratively with licensees and technology partners on a joined-up approach, for example supporting smaller operators with takedown requests and in planning legal action
- ✓ Combine the rights holders' global oversight with individual licensees' local market knowledge
- ✓ Use intelligence and monitoring to identify and address illegal exploitation of content
- ✓ Automate rapid takedowns of infringing social/UGC streams and illegal IPTV apps in apps stores

Rights licensing strategy

- ✓ Where possible, ensure rights are licensed in every market, avoiding territory "black holes"
- ✓ Review the use of rights holdbacks that risk leaving game blackouts, consider using modern technology to make them more targeted.
- ✓ Identify opportunities to maximize reach and favor licensees who have cross-bundling and aggregation deals with other platforms
- ✓ Encourage licensees to air all games, deterring them from "warehousing" rights
- ✓ Prioritize licensees who have an effective multiscreen and OTT/TV Everywhere strategy, or make this mandatory in rights contracts

Product strategy

- ✓ Evaluate the impact of price segmentation approaches, for example carving out some rights to enable free-to-view highlights clips
- ✓ Consider flexible access tiers in owned-and-operated direct-to-consumer products
- ✓ Embrace social media and fan creators, providing a subset of content to fans wanting to share and create

“How do we maximize our ability to reach the fan who will pay? We need to create and distribute the right product on the right platforms”

—Sports rights owner—

An agenda for a consumer-centered approach to reducing piracy

Checklist for sports rights buyers

Rights negotiations

- ✓ Include content protection experts in sports rights negotiations to assess the impact of piracy on the value of those rights
- ✓ Negotiate contract terms that reflect commercial success in fighting piracy to the benefit of both broadcasters and rights owners
- ✓ Consider the global picture and identify the weakest links in distribution that may compromise the protection of the rights
- ✓ Ensure onward distribution partners implement effective security measures in their platform, such as modern CAS encryption and visible or forensic watermarking capable of identifying and cutting off individual subscribers

Multiscreen strategy

- ✓ Deploy a multiscreen/TV Everywhere strategy to ensure subscribers can access all channels and content away from home using mobile devices
- ✓ Implement measures to counter credentials sharing of those multiscreen accounts
- ✓ Support screen casting and streamer devices

Aggregation

- ✓ Agree cross-distribution deals with other platforms to make all key rights available on each platform
- ✓ Aggregate OTT services and bundle subscriptions, particularly where league rights are split between pay TV and OTT providers

Product innovation

- ✓ Make it easy for viewers to become customers with clearly-defined products, easy onboarding and self-service
- ✓ Offer flexible terms to suit the behaviors of each of the five consumer segments, such as access to a specific league, or day passes for one-off events
- ✓ Consider licensing highlights and clip rights to offer “light” access to certain sports for casual fans on lower-tier subscriptions

Pay TV & OTT platform security

- ✓ Implement a broad-based security strategy that goes beyond traditional smartcard fraud to manage the threat from illegal IPTV competitors
- ✓ Retire insecure legacy set-top boxes and ensure consumer-premises equipment is able to support latest-generation security
- ✓ Audit OTT platforms for security weaknesses, particularly the risk of spoofing CDNs
- ✓ Ensure widespread device coverage is balanced against the security risk of the “lowest common denominator” devices served
- ✓ Use forensic watermarking to identify every OTT stream and enable immediate takedown of subscribers acting as the source of pirate streams
- ✓ Implement content and service security including application integrity, device authentication and other best practice measures.

A targeted response addresses each cluster of consumers

Technology to tackle illegal content



All players in the sports business chain need to weigh up the likely return on any investment they make to address piracy. Spend on content protection is competing against a wide range of other priorities with similar potential to increase revenue and profitability. With such a diverse range of factors prompting consumers to access illegal content and the need for a targeted response, a broad-based technology and operational response is essential.

An example is Synamedia's Streaming Piracy Disruption (SPD) solution, a managed service for content and rights owners. This provides resilient watermark injection and verification with monitoring at both head-end and device level—coupled with human intelligence and expertise in Synamedia's EverGuard counter-piracy operations and intelligence center. With stream disruption proving an effective strategy to deter consumers from accessing illegal sports services, SPD allows rights holders to conduct multiple disruption options to overcome evasion tactics.

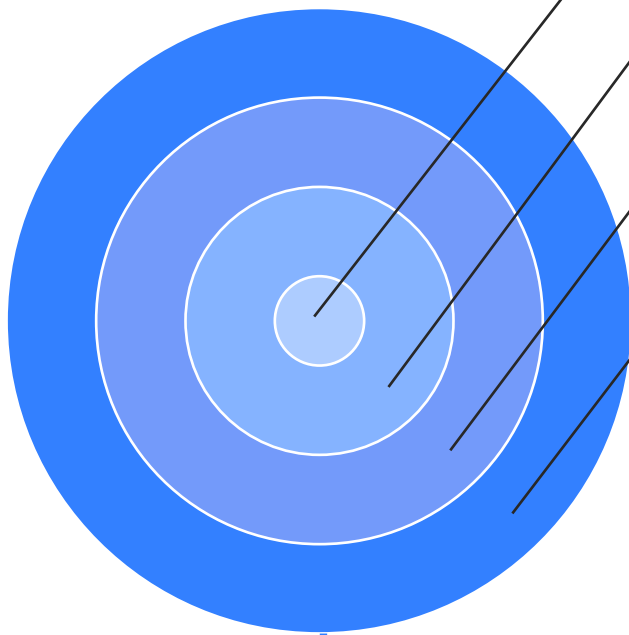
Tools like Synamedia's VideoGuard OTT Security enable platform owners to secure streaming platforms, including deterring credential sharing. Proactively protecting rights will deliver a positive return-on-investment, evidenced by Synamedia's willingness to provide its SPD technology on an ROI share model.

The next report in this series will model the opportunity for sports rights licensees—sports broadcasters, OTT platforms and pay TV platforms—to grow revenue by transforming a proportion of illegal viewing into paying subscriptions.

Online quantitative study of more than 6,000 sports fans aged 18-64

5.0 Notes on methodology

Study Background



Ampere Analysis ran an online quantitative study of over **6,000 sports fans** aged 18-64 in March 2020, before the coronavirus-related lockdown and event suspension.

The study was run in **ten markets**: Brazil, Egypt, Germany, India, Italy, Jordan, Malaysia, Saudi Arabia, UK and USA.

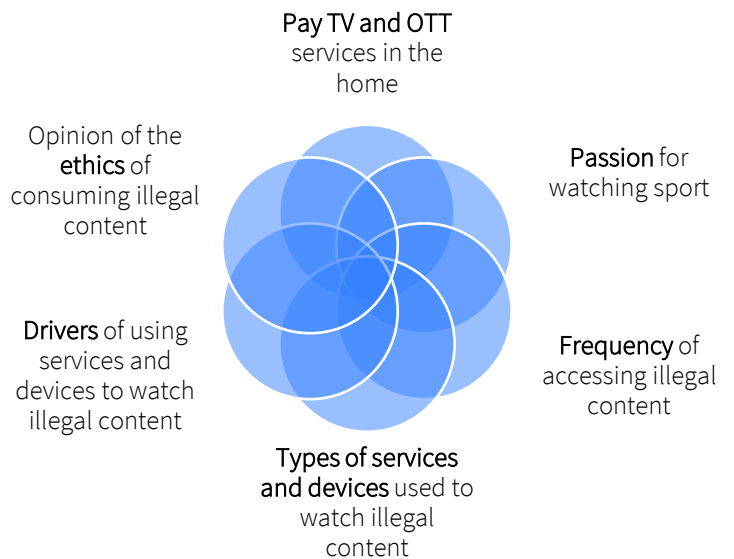
Respondents were chosen based on their experience of **watching sport** on TV.

Segments were created using a **k-means cluster analysis** which groups similar consumers into distinct groups.

Industry interviews were conducted throughout the process to aid in survey design and report formulation, and to ensure stakeholder concerns were adequately reflected.

The analysis resulted in five distinct groups of consumers, each with varied attitudes and behaviors around accessing illegal sports content streams.

Clustering criteria



Real-world options for operators and rights holders

Tackling sports piracy in an IP world

For more information about this report, or about Synamedia's services and solutions, please contact:

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