



AMPERE

ANALYSIS

**Financial impact of sport, movie and TV piracy on the
entertainment and subscription TV business:
Summary of model output**

Piracy is multi-billion dollar problem



Across the seven countries surveyed, sports piracy leads to annual losses of \$9.8bn and movie and TV piracy, a further \$21.8bn



The US market is the most heavily impacted with losses to sport piracy of over \$5bn a year and an additional \$13.7bn to movie and TV piracy



In other markets sport piracy ranges from \$200m (Thailand) to \$1.2bn (UK) a year and movie & TV piracy from \$470m (Thailand) to \$2.3bn (India) a year.



Traditional cable and satellite is the biggest loser to sport and movie piracy accounting for more than half of all revenue lost to piracy



Major movies and franchise TV seasons are capable of driving between \$130m and \$280m of revenue to legitimate streaming platforms if piracy was stopped



Combined, 28 of the most pirated movies and TV shows accounted for \$1.8bn in annual losses for the studio streamers in the US



Across the seven countries surveyed streamers are losing nearly \$10bn a year to piracy and a significant number of subscribers



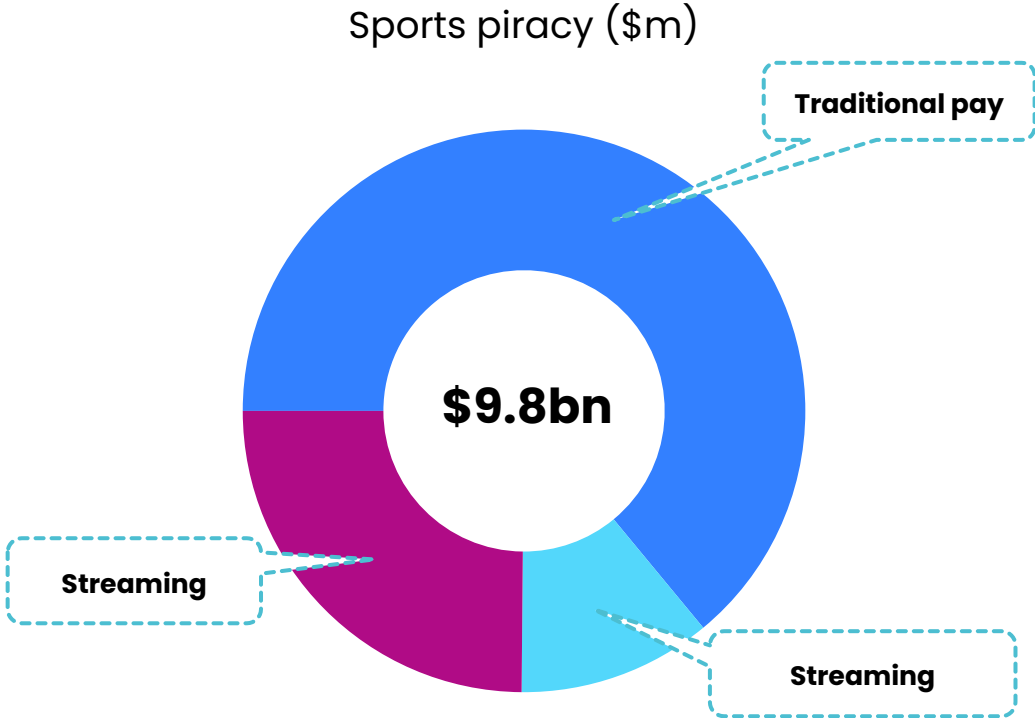
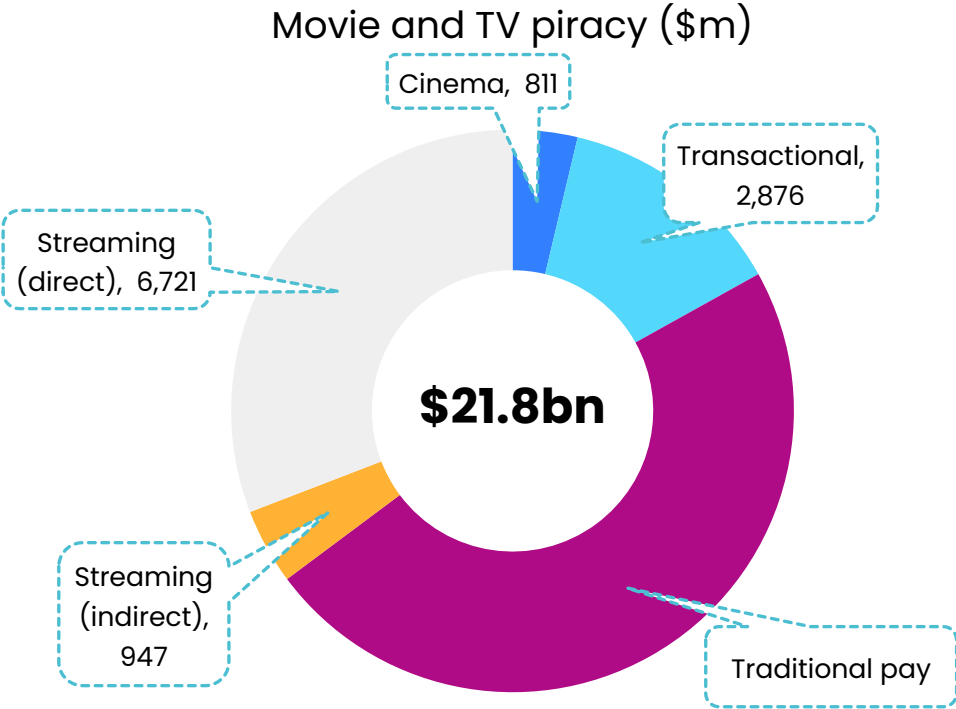
Piracy of major super-hero blockbusters that were made available on streaming platforms was particularly impactful on potential revenue loss



More than \$30bn lost each year from the seven countries surveyed

Lost movie and TV revenue due to piracy totals \$21.8bn

Sport revenue lost to piracy totals \$9.8bn

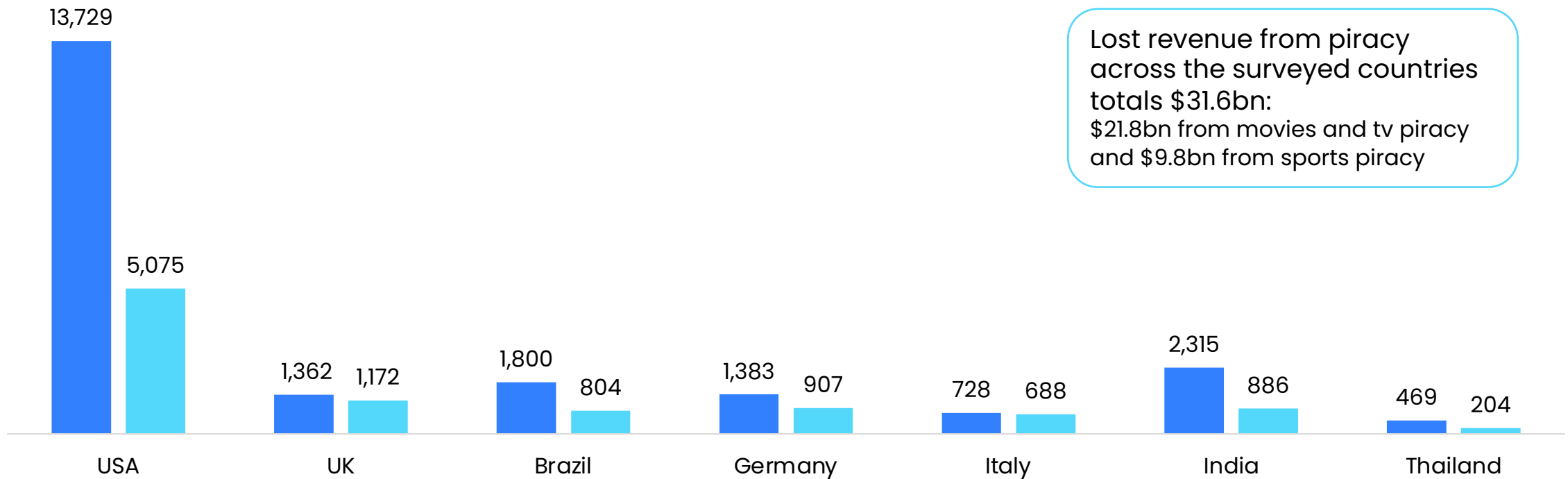


Source: Ampere Analysis

Global summary: US accounts for more than half of the lost revenue

Global: Revenue lost due to piracy (\$m)

■ Movie & TV piracy ■ Sports piracy



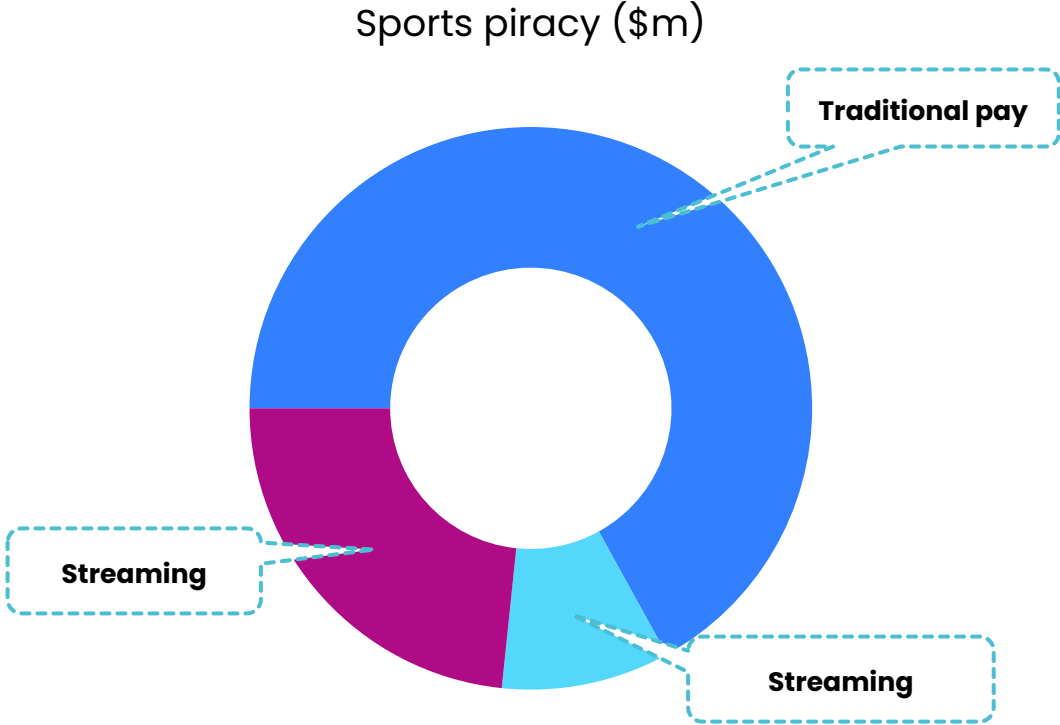
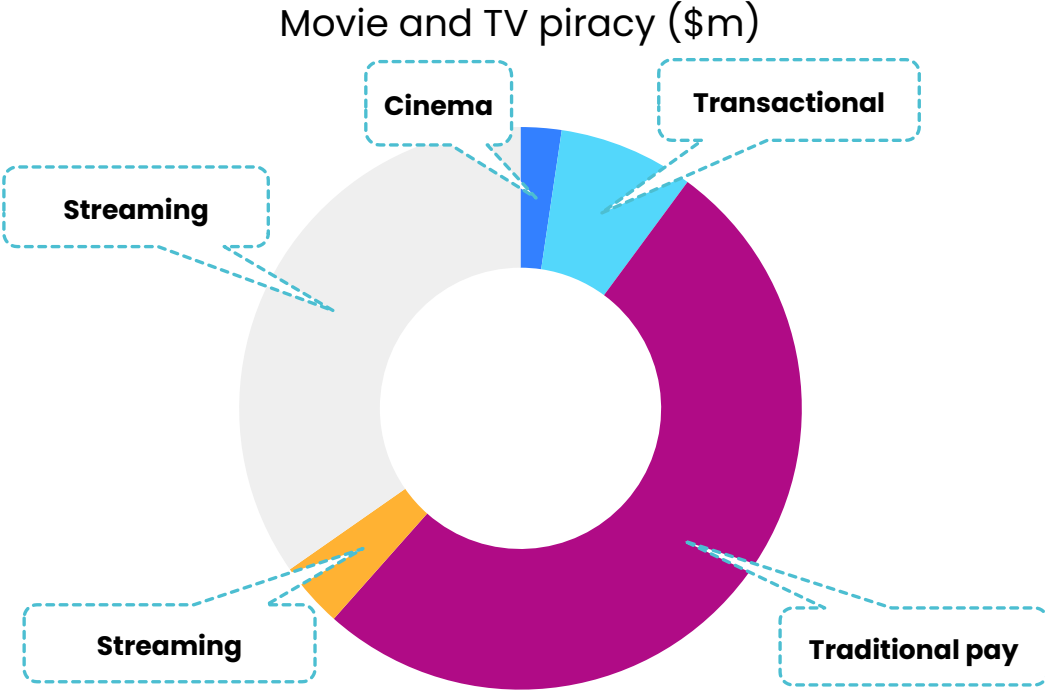
Lost revenue from piracy across the surveyed countries totals \$31.6bn: \$21.8bn from movies and tv piracy and \$9.8bn from sports piracy

Source: Ampere Analysis

USA: biggest piracy costs in traditional pay TV and direct streaming

Lost movie and TV revenue due to piracy totals \$13.7bn

Sport revenue lost to piracy totals \$9.8bn

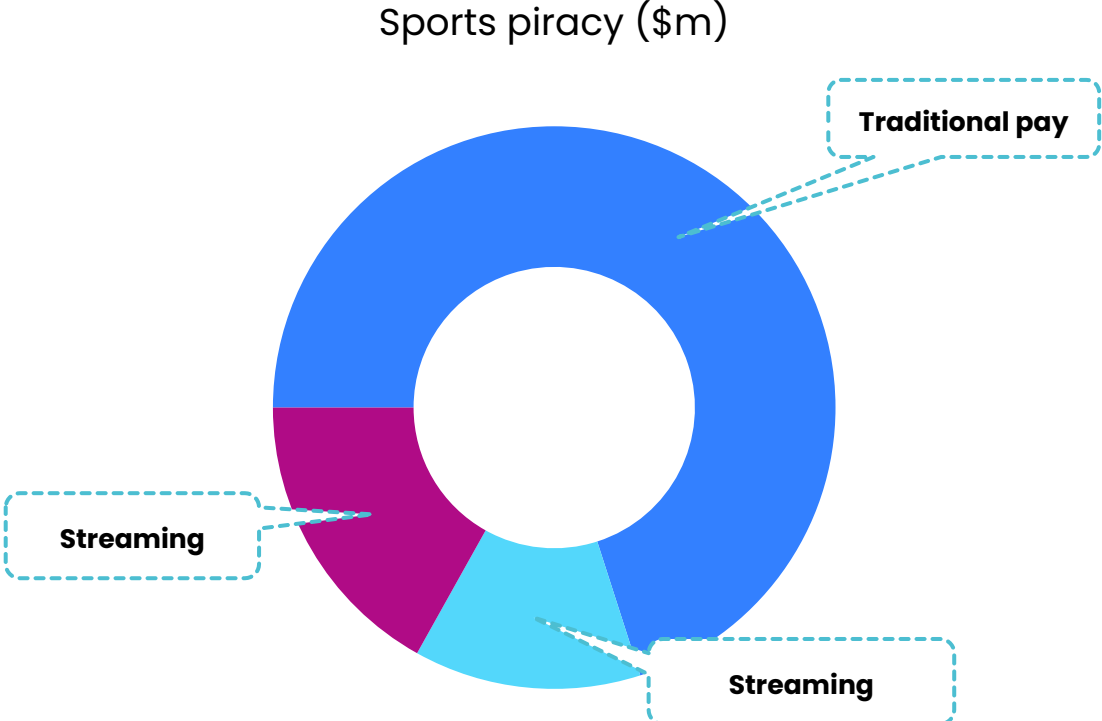
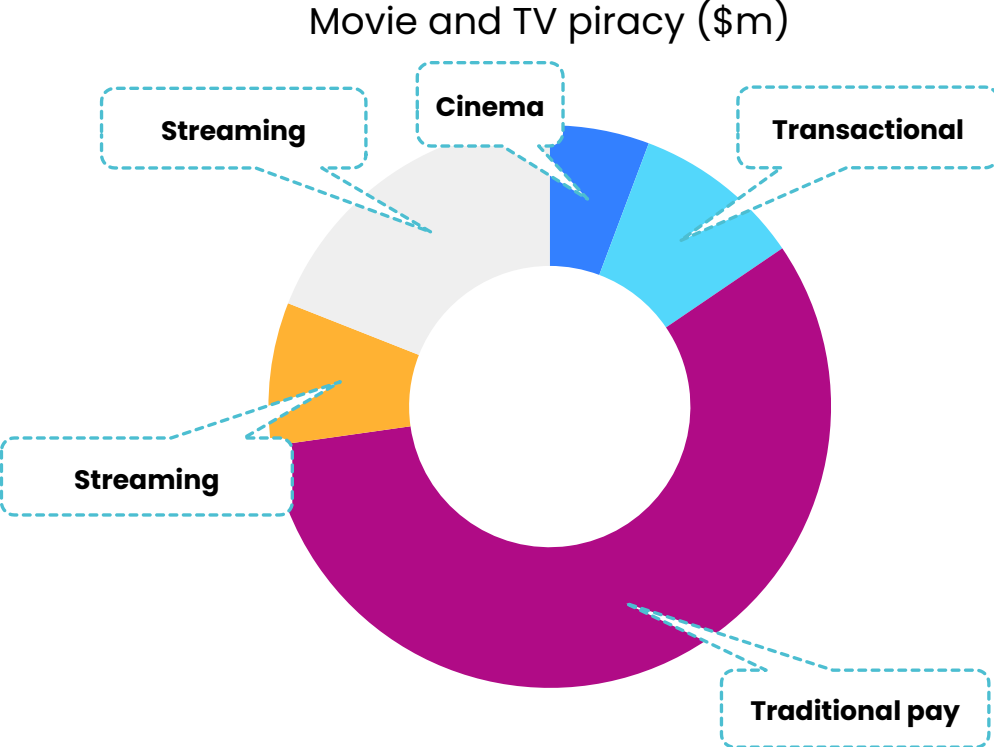


Source: Ampere Analysis

UK: Traditional pay TV is the big loser across both cable and satellite and streaming

Lost movie and TV revenue due to piracy totals \$1.36bn

Sport revenue lost to piracy totals \$1.17bn

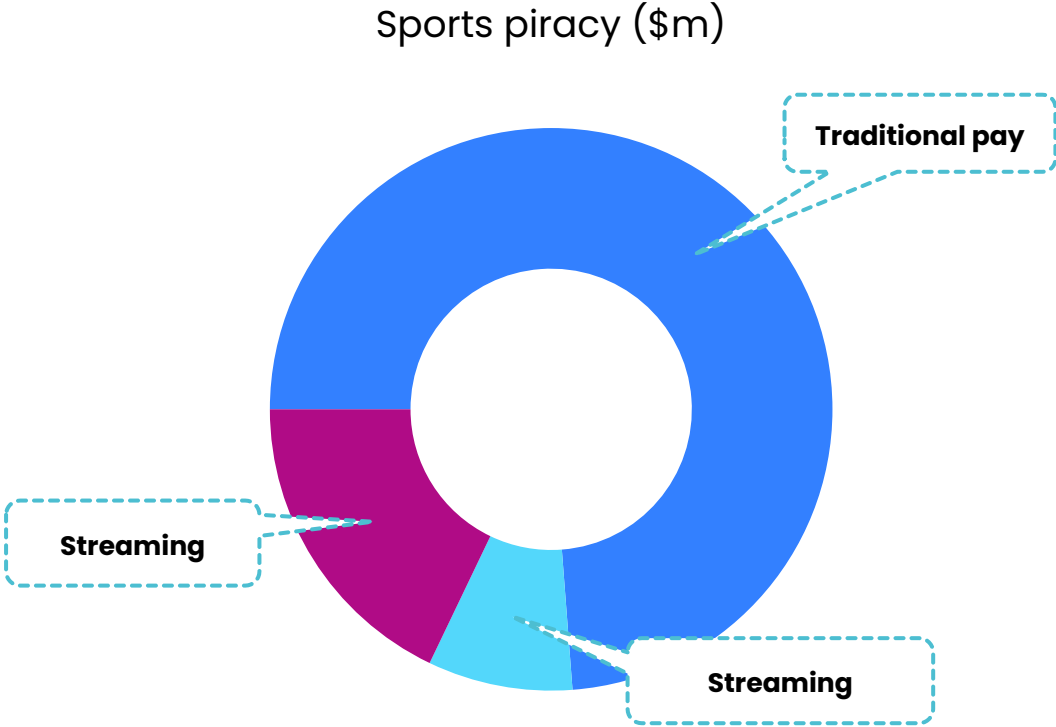
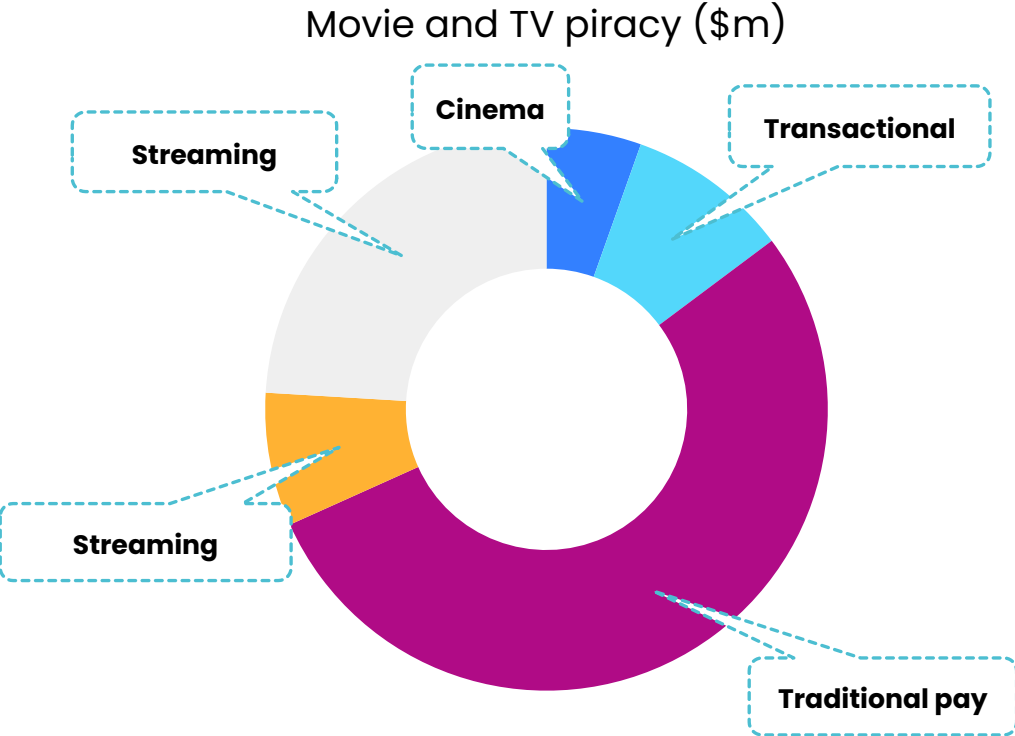


Source: Ampere Analysis

Brazil: One third of movie & TV and two thirds of sport piracy revenue lost to cable and satellite

Lost movie and TV revenue due to piracy totals \$1.8bn

Sport revenue lost to piracy totals \$804m

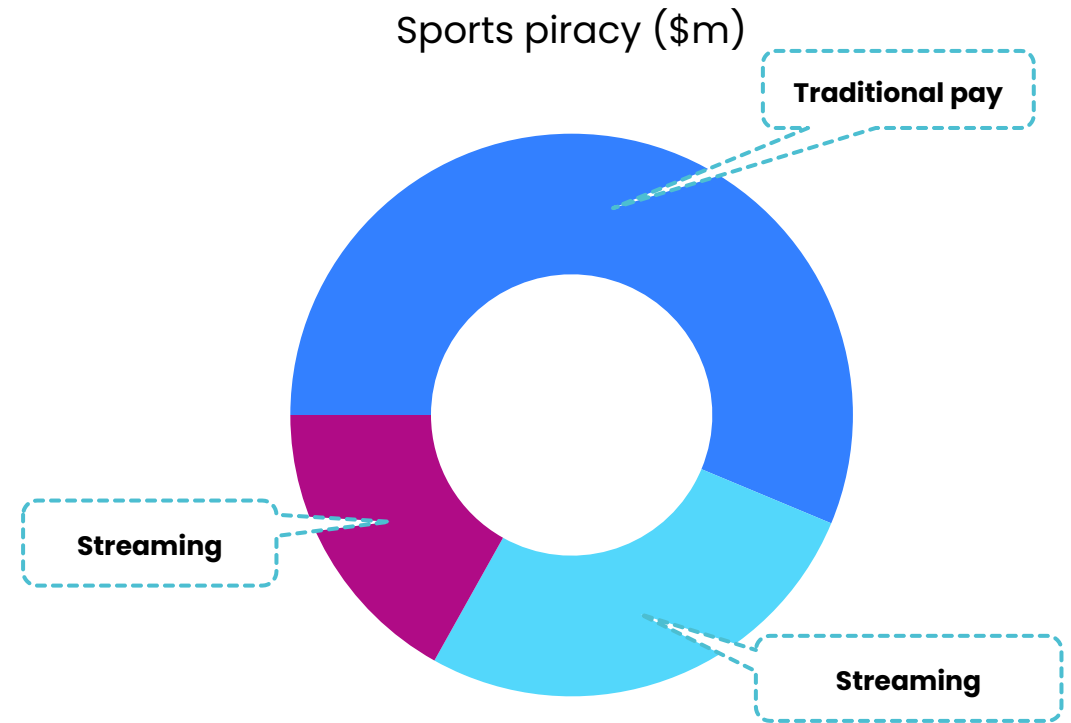
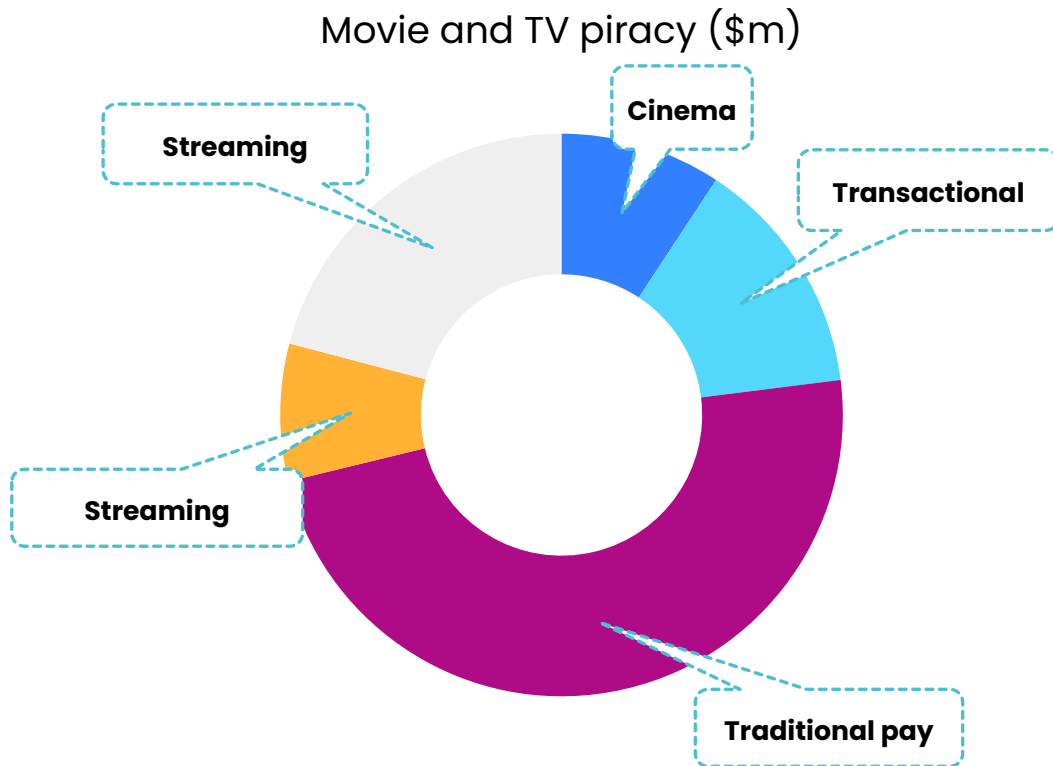


Source: Ampere Analysis

Germany: Revenue loss is evenly split between streamers and cable and satellite for sport

Lost movie and TV revenue due to piracy totals \$1.4bn

Sport revenue lost to piracy totals \$907m



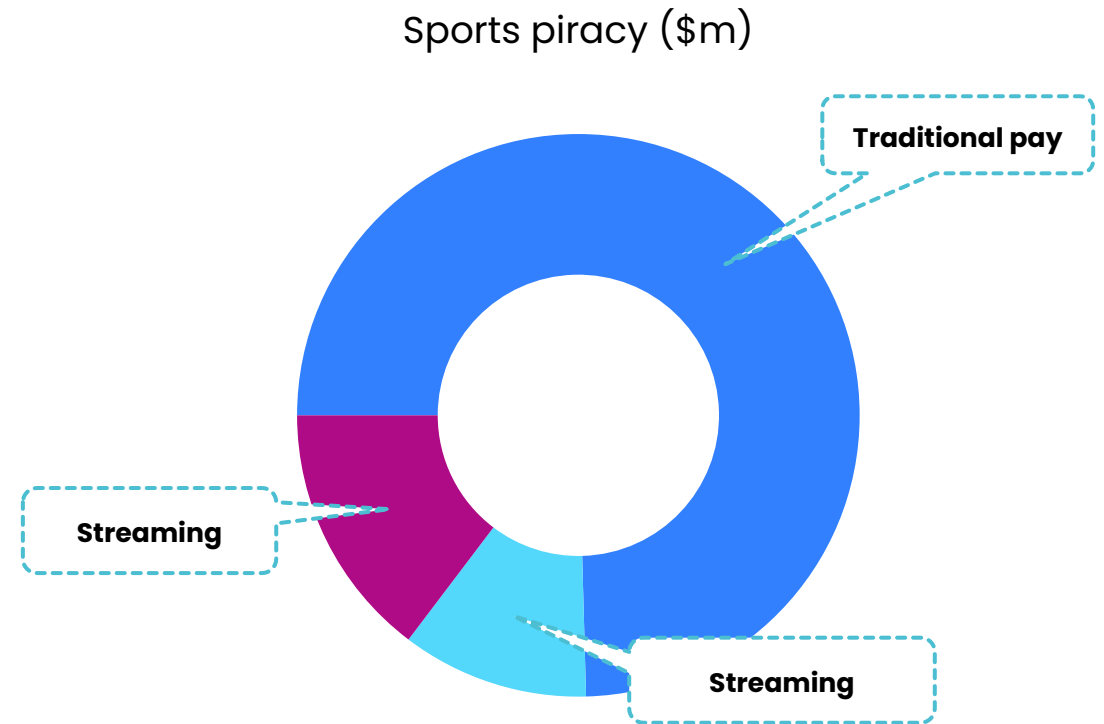
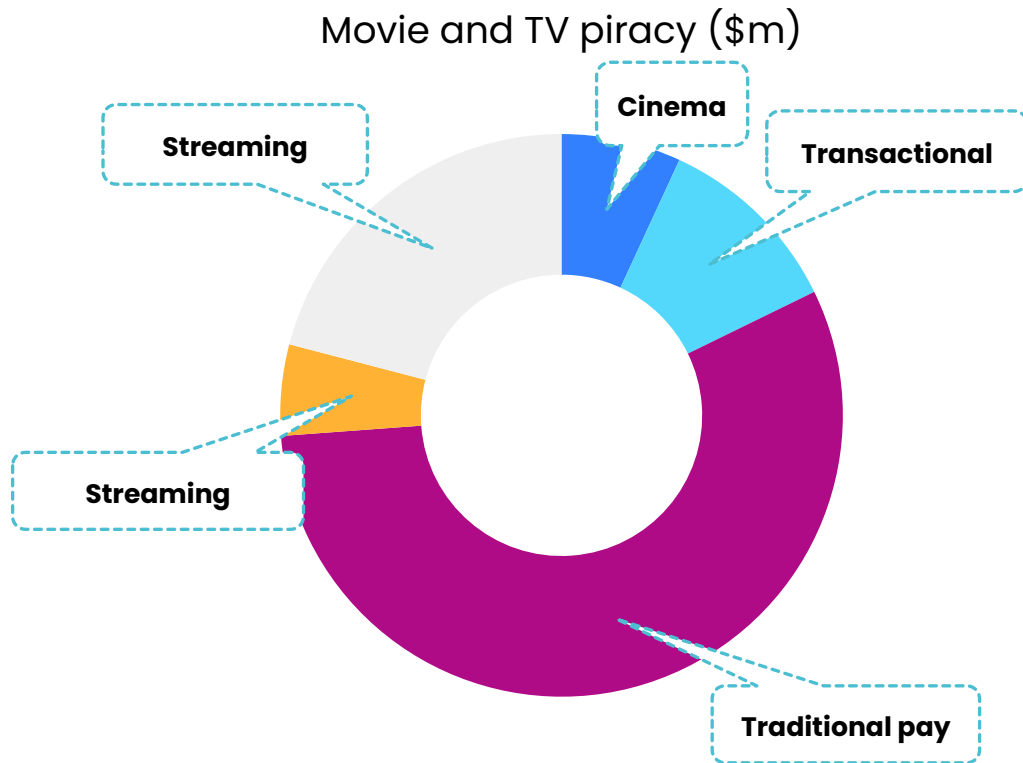
Source: Ampere Analysis



Italy: Sports piracy overwhelmingly impacts satellite TV in Italy

Lost movie and TV revenue due to piracy totals \$728m

Sport revenue lost to piracy totals \$688m



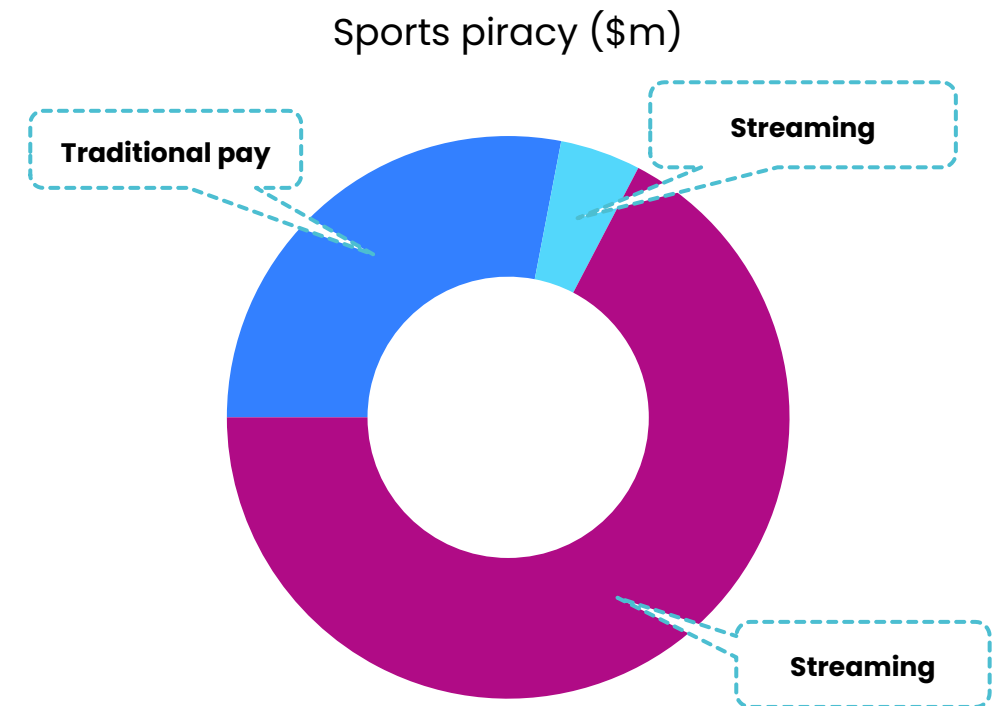
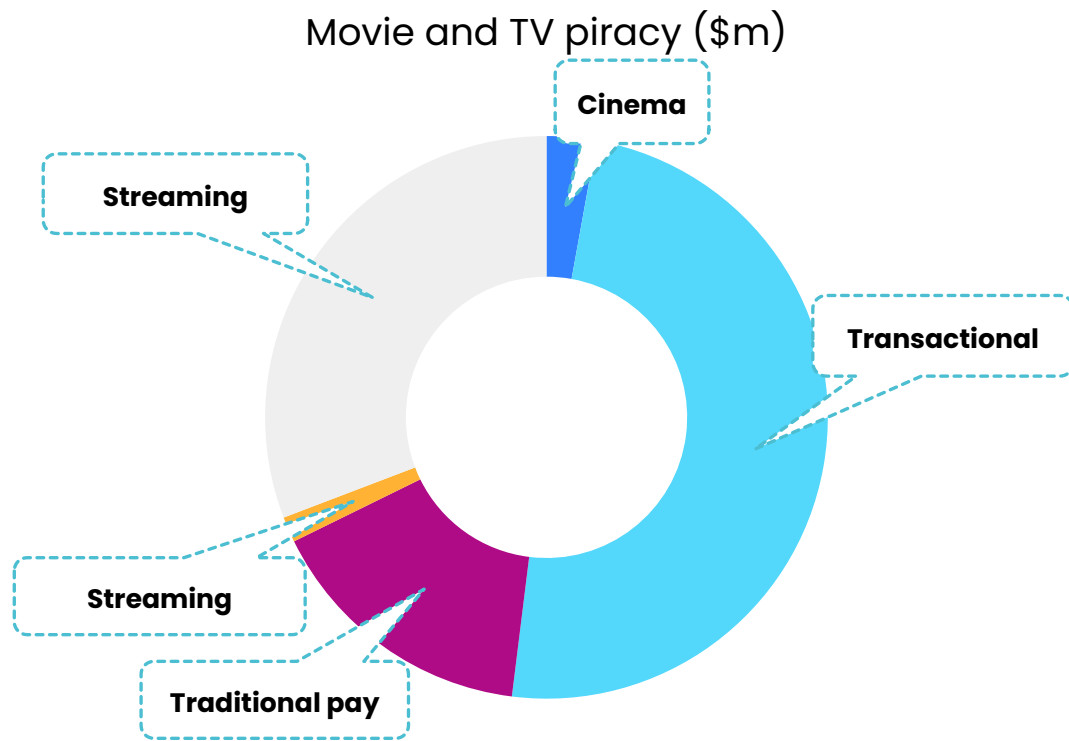
Source: Ampere Analysis



India: Movie piracy is a huge problem in India

Lost movie and TV revenue due to piracy totals \$2.3bn

Sport revenue lost to piracy totals \$886mn



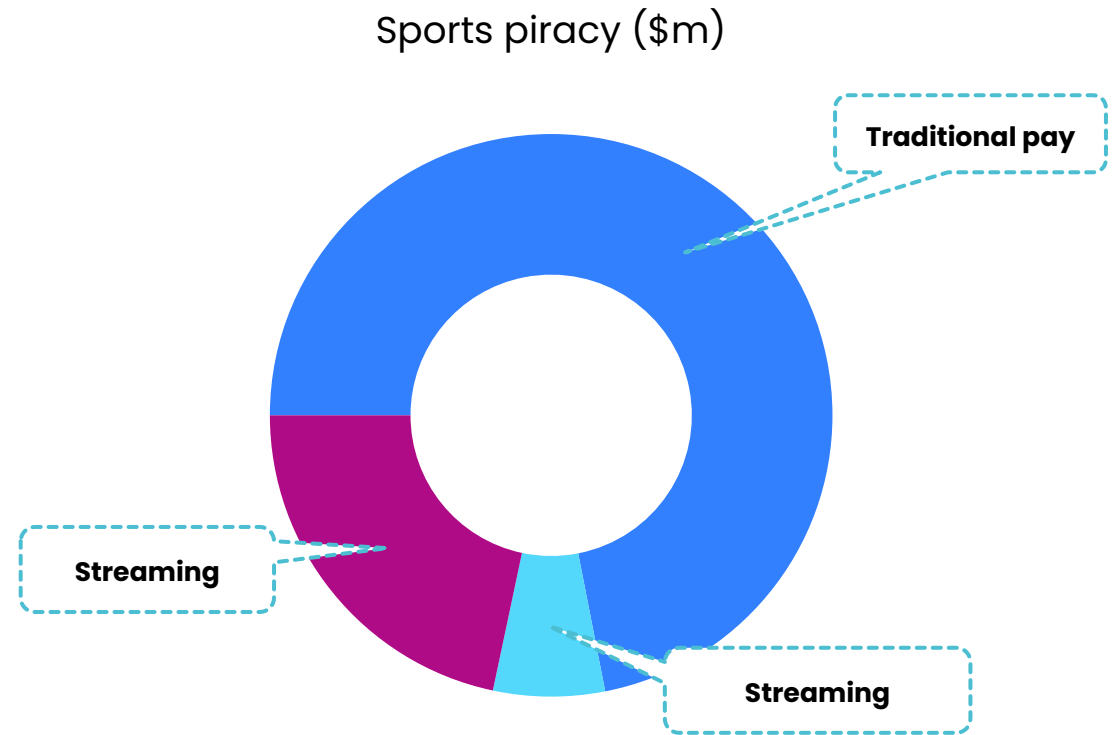
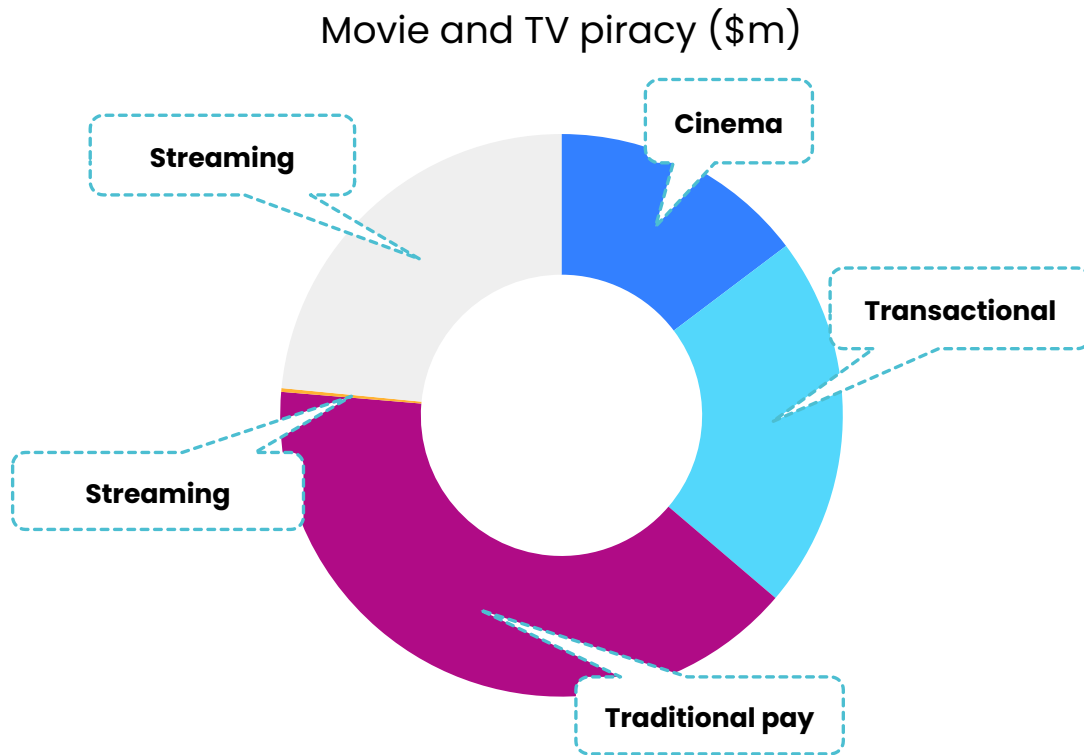
Source: Ampere Analysis



Thailand: Thailand loses \$673m in annual revenue to piracy

Lost movie and TV revenue due to piracy totals \$469m

Sport revenue lost to piracy totals \$204m

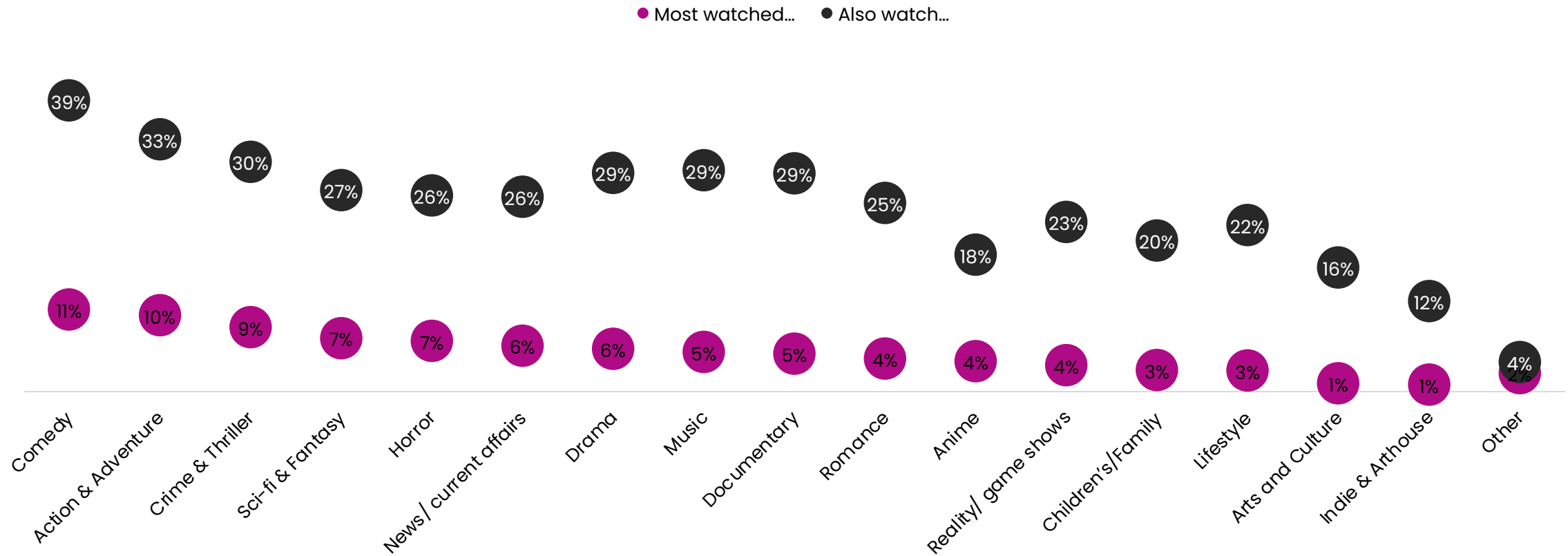


Source: Ampere Analysis



Comedy is the most pirated genre of TV show or movie, with 50% saying illegally stream it

Most pirated genres (% movie and TV show pirates)



Source: Ampere Consumer – n=12,906

Background to study

Background to the study

Survey of 16,000 Internet users across the USA, UK, Brazil, Germany Italy, India and Thailand to understand their engagement with pirate content across TV, movies and sport.

Respondents were asked questions including:

- Basic demographics. Age & gender, household composition, education, income brackets, ethnicity
- Existing services in household (pay TV, SVoD, premium channels)
- Awareness and frequency of usage of different forms of illegal streaming for both live sport and TV shows and films
- Whether they pay for illegal streaming services or watch for free
- The sports and genres of TV and movie content that they watch via illegal streams
- What they would do if they could no longer access illegal streams
- Specific titles accessed via illegal streams (US only)

The resulting data has produced:

- A model outlining the cost of piracy across all markets, at a total and operator level as well as a title level model in the US to understand the value of particular TV and movie titles at driving revenues for streaming services
- A report looking at the demographics of pirates and an understanding of what they pirate and how





For a deeper dive into our findings country by country, or to book a free consultation, please contact Simon Brydon at sbrydon@synamedia.com