



EDITION 3 | JUNE 2020

HAS THE DISPLACED CINEMA AUDIENCE BECOME THE NEW PIRACY AUDIENCE?

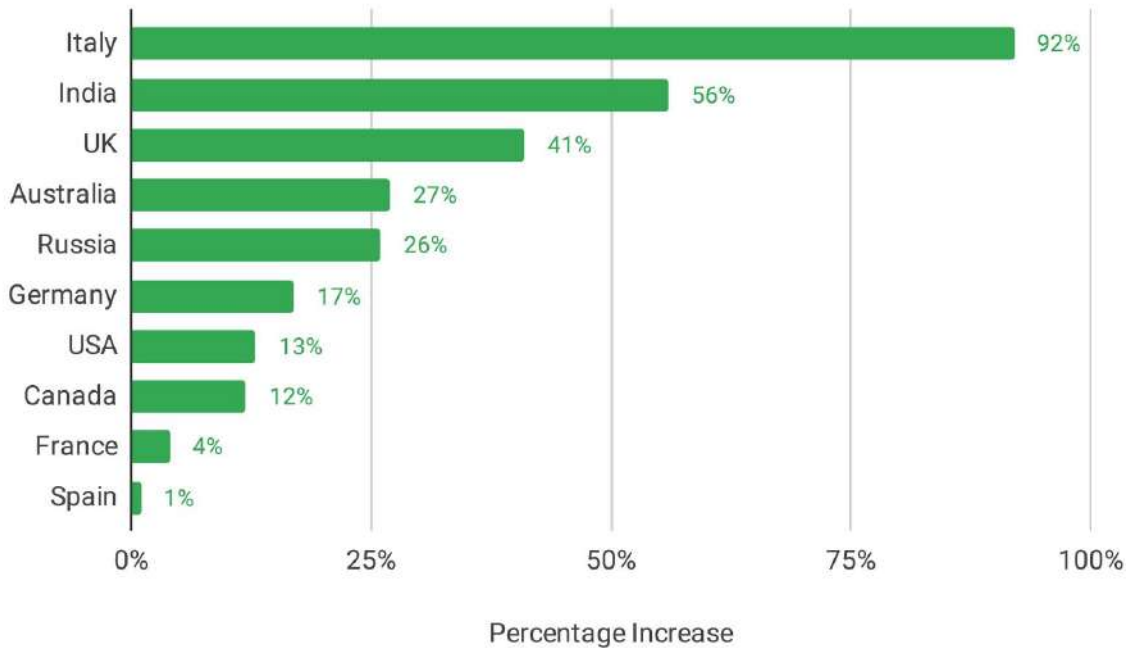
A MUSO WHITE PAPER

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Has the displaced cinema audience become the new piracy audience?

MUSO has released new data that uncovers the wider developing trends in film piracy during the COVID-19 lockdown, where over one-third of the world's population observed mandatory stay-at-home policies in over 42 countries or territories.

MUSO's data released last month revealed film piracy spikes in the last week of March as countries went into lockdown, data for April shows a continuation of this trend:



Visits to film piracy sites in April 2020 compared to March 2020 when measuring the average daily visits. Data from MUSO.com

Whilst it is unclear whether this trend will continue or settle back to pre-COVID levels, there are some insights within the data that may point to a new audience having discovered piracy.

The Theatrical Window:

Bloodshot, starring Vin Diesel, was the last major movie to be released before cinemas worldwide were affected by the coronavirus pandemic on March 13th 2020. Receiving mixed reviews from critics, *Bloodshot's* release strategy changed to counter the impact of COVID-19 and was made available to rent and buy digitally on March 24th.

As soon as it was available legally, the high-quality version leaked to piracy. MUSO measured a massive piracy spike of over 1.2m torrent downloads on March 25th, far higher than for any other film in recent times. *Bloodshot* saw torrent downloads totalling over 2.4 million and streaming visits over 8.7m in March.

Cam-Rip vs High Quality (HQ) Piracy

As a general rule for film piracy, files known as *cam-rips* usually appear during the theatrical window but it's when the *HQ* pirated file appears that demand spikes higher.

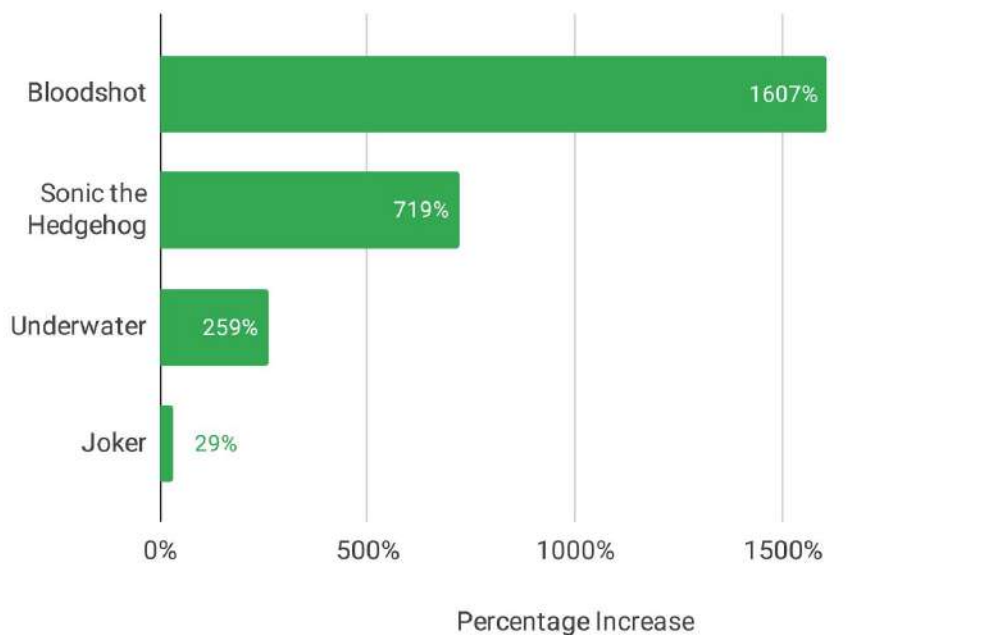
When we compare the first 7 days of *cam-rip* piracy, to the first 7 days of *HQ* piracy for visits to streaming sites, we can see a comparative indication of demand during and after the theatrical release window.

Bloodshot which only had a theatrical window of a few days, due to the cinema closures, saw an increase of 1607% between the first 7 days of the *cam-rip* to the first 7 days of *HQ* piracy.

Sonic The Hedgehog, which had a U.S. theatrical release on Feb 14th but was ultimately cut short by the lockdown, saw an increase of 719.16% when comparing the first seven days of *cam-rip* data to the high-quality version on piracy sites.

Underwater which was released on January 10th 2020, had a longer theatrical window only saw an increase of 259.21%

Joker, the Joaquin Phoenix film released in the U.S. on October 4th 2019 had a full release window and only saw a 29% increase in streaming visits when the high-quality version leaked on November 10th 2019, compared to the first 7 days of the *cam-rip* leak, over a month earlier at the beginning of October.



Comparing the first 7 days of *cam-rip* to high-quality piracy. Data from MUSO.com

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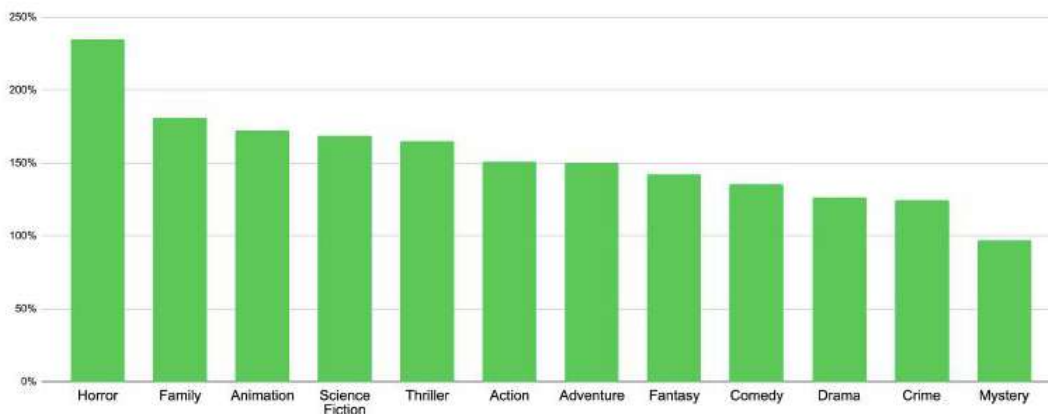
The data indicates unprecedented piracy demand for digital releases which have short cinematic release windows and needs careful analysis for post-COVID-19 theatrical windowing strategies.

It must be considered that displaced cinema audiences are impacting the increases in film piracy seen during the lockdown. Interestingly certain countries prefer quicker access to views, notably, India, USA & UK who show a higher demand for cam-rips and marked a significant decrease in share when compared Russia & Brazil who show the biggest increase in demand for the post-digital release, HQ leak.

Genre:

Exploring how genre demand has changed during the COVID-19 lockdown we see some fascinating trends. Whilst film piracy has risen considerably across all genres, the ones linked to escapism like horror, family, animation, science fiction have seen far more dramatic increases in demand than genres linked to releases like drama, crime and mystery:

- Demand for Horror film in April was 235% vs February
- Demand for Family film in April was 180% vs February
- Demand for Crime film in April was 124% vs February
- Demand for Mystery film in April was 96% vs February (actually dropping despite the huge overall increase in demand for film)



Demand change by genre: February vs April 2020. Data from MUSO.com

Schools out:

On March 18th schools closures were announced in the UK. MUSO saw a sharp increase in demand for family movies. Globally the family genre saw a 180% increase in torrent downloads comparing April to Feb 2020



Pre-2019 Family Film: UK. Data from MUSO.com

Summary:

It is unclear whether these new piracy audiences will return to pre-COVID-19 levels or not once activities like going to the cinema resume or whether they will actively remain after the pandemic fades, access to content, pricing and the economy will be key factors.

What is clear is that piracy audience data reveals real intent and reflects the market and global conditions in near-instant time. This audience doesn't necessarily respect the commercial strategies and desired outcomes of the right-holders but the rights-holder can inform and improve their desired outcomes and commercial strategies by understanding piracy audiences.

MUSO unrivalled dataset provides the most complete and trusted view of unlicensed media consumption and global piracy demand that helps companies make better decisions that drive performance, ROI and value and build winning content strategies.

To access MUSO Discover and starting exploring our data today, please contact us at hello@muso.com