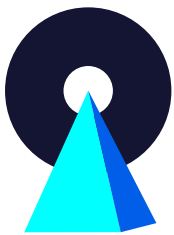


L'essentiel



40% of *live-streamed* sports consumers experienced being blocked from infringing websites in the first half of 2022.

Arcom has been given a new role in the fight against illegal practices, in particular through the possibility of updating the blocking of websites that are unlawfully broadcasting competitive sports, following a court ruling in a case brought by rights holders.

An initial assessment of these measures shows their effectiveness: the overall audience of infringing sports live streaming websites halved between January and June 2022 (down 49%) and more generally fell 47% between the first half of 2021 and the first half of 2022. 40% of Internet users using infringing live streaming sites have been blocked at least once. In response to Arcom's measures, 37% stopped their infringing usage and 15% turned to a legal service instead.

In contrast, 46% have turned to other infringing services and 12% of Internet users use circumvention measures to do so.

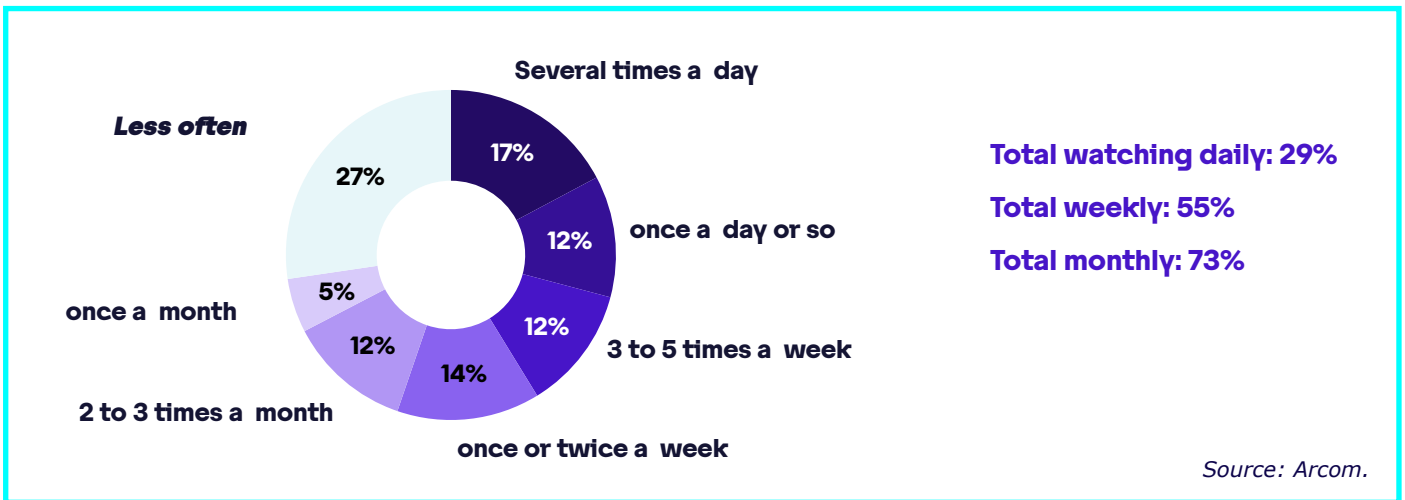
The protection of sports content therefore calls for increased vigilance, by strengthening cooperation between Internet service providers and sports rights holders through agreements, by improving technological blocking solutions and, more broadly, by recruiting all parties involved technically in the Internet ecosystem, such as domain name system (DNS) providers, virtual private networks (VPNs) or hosting services, for example, to this fight against piracy.

97% of Internet users say they have watched live sports events.

Almost all Internet users are interested in sports content; 97% report they have watched all or part of a live sports

event at some point, and 73% of them do so on a monthly basis.

Figure 1: Frequency of viewing live sports broadcasts - base: Internet users aged 15 and over



Nearly eight out of ten Internet users (79%) use lawful methods to watch sport: 63% watch sport on free TV channels and 37% using a paid service offered by a TV channel or an online audiovisual service.

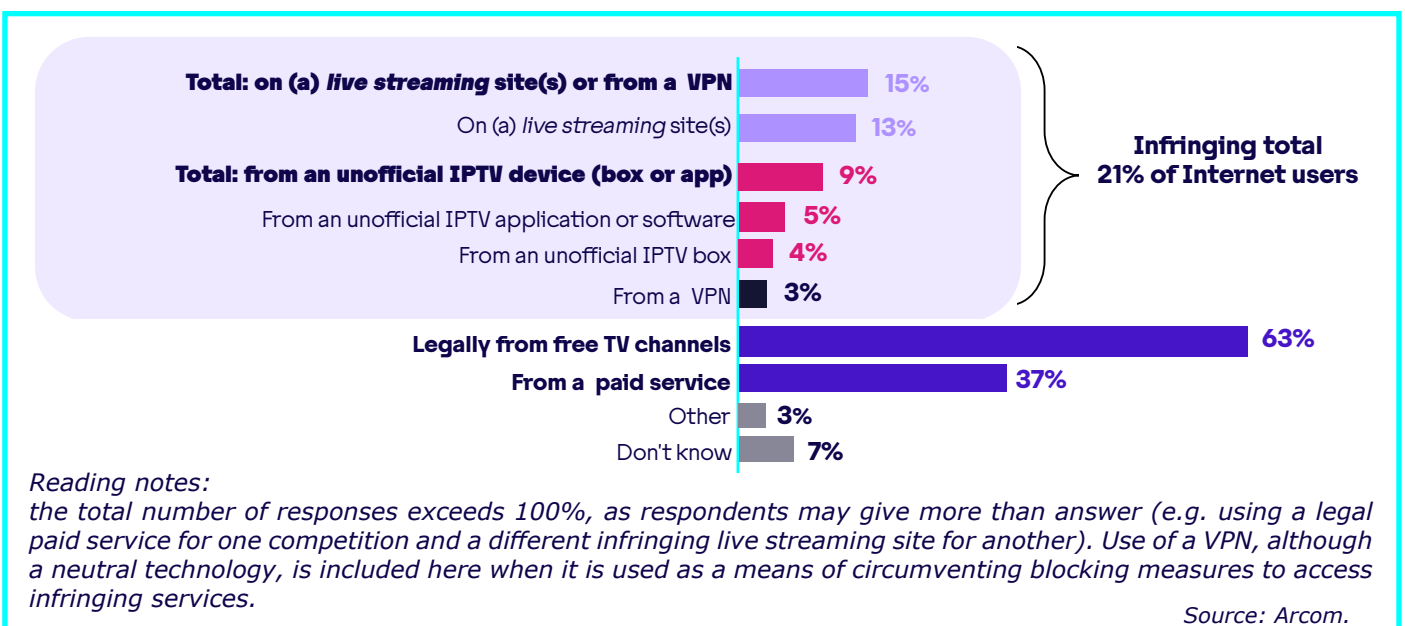
Football is the sport most watched by French Internet users, watched by 74% of internet users over the last six months, ahead of tennis and cycling (62% and 52% of internet users respectively).

21% of French Internet users say they have previously watched infringing sports content

21% of French Internet users admit they have watched infringing sports content, and 13% in particular on live streaming sites. This practice of illicit live streaming, which has been observed for several years, is seeing a significant

resurgence and reaching new users: **44% of consumers of infringing live-streamed sports events started doing so less than a year ago.**

Figure 2: Live sport consumption method - base: Internet users aged 15 and over



Use of IPTV and VPN as an alternative to live streaming

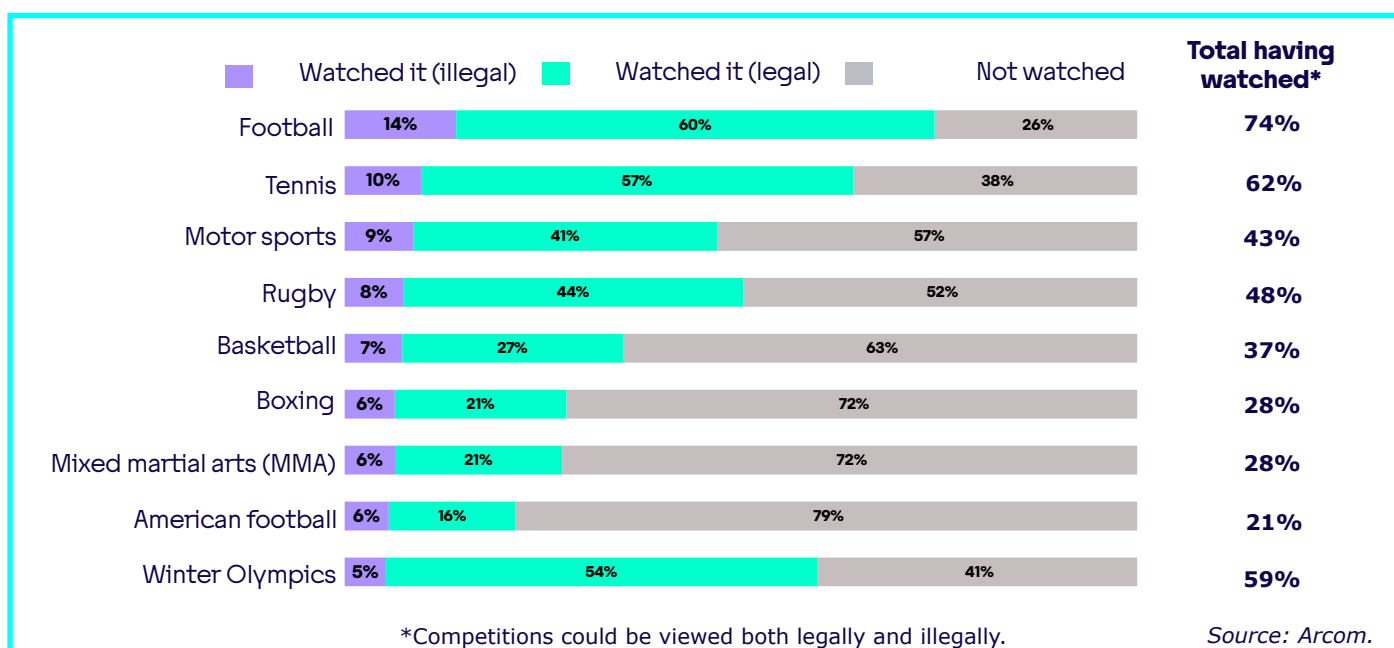
9% of French Internet users say they have previously used infringing IPTV to watch live sport. For most of them (5% of Internet users) such consumption is done from an application. Illegal IPTV boxes, meanwhile, have been used by 4% of Internet users at some point. IPTV is a recent phenomenon for most people: 57% of users started less than a year ago and 23% since the beginning of 2022.

A VPN is used by 3% of Internet users to access live sports content. Its use by live streaming consumers is also expanding: 55% have been using it for less than a year and 27% for less than six months.

Football, the most watched sport in general, is also the most watched illegally, by 14% of live sport consumers. The four competitions most frequently viewed illicitly are all football competitions: Ligue 1 (23%), the UEFA Champions League (23%), the English Premier League

(18%) and the Europa League (17%). This puts football ahead of tennis (10% of infringing consumption), motor sports (9%) and rugby (8%).

Figure 3: Sports watched in the last 6 months (summary) - base: consumers of infringing live sports streams



72% of consumers of infringing live-streamed sports watch sport, legally or illegally, at least once a week

Consumers of infringing live-streamed sports have a relatively specific profile: **younger than the average Internet user** (average age 35.4 years compared to 44.9 years for all Internet users), they are also **more male** (53% compared to 48% on average) and belong **mainly to**

higher socio-professional categories, somewhat urban and particularly in the Paris region (7% compared to 5% for the average Internet user).

They are also very keen watchers of sports content, regardless of the mode of access, be it legal or illegal: 27% watch sport several times a day, 13% almost daily, 20% about 3-5 times a week and 12% about 1-2 times a week.

In total, therefore, **72% of Internet users who consume infringing sports content watch sport on a weekly basis.**

40% of users of infringing live streaming websites have been blocked at some point in the last six months

The new legislation on blocking sports

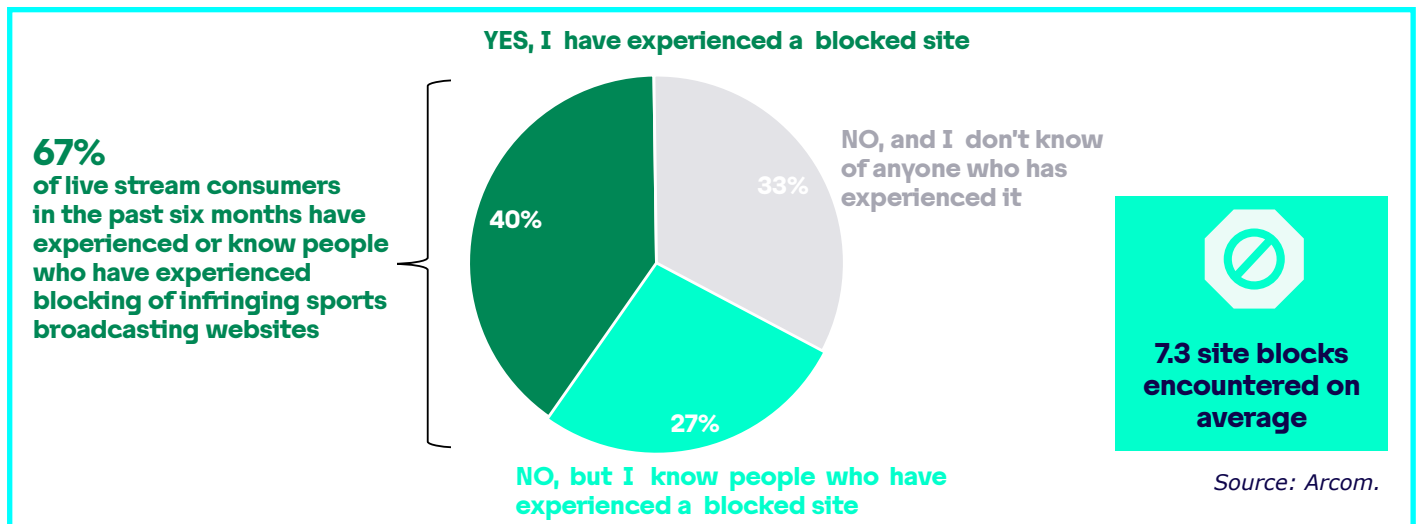
In force since 1 January 2022, Article L.333-10 of the French Sports Code has created a mechanism open to the audiovisual exploitation rights holders of a sports competition or event who may, when serious and repeated infringements of their rights by an illegal service have been observed, refer the matter to a judge to request the blocking of the service and refer it to Arcom in order to update these court rulings.

In the period from January to September 2022, Arcom received 41 referrals relating to nine sports competitions, covering a total of 481 domain names notified by the Authority to Internet service providers for blocking. In total, added to the services blocked pursuant to the initial court rulings, 835 infringing websites have been blocked since the beginning of 2022.

Of all live stream users over the past six months, **40% have personally experienced a site block** and 27% know friends or family members who have been blocked. **In total, 67% of live stream consumers have experienced blocking directly or indirectly.**

Internet users who have been blocked experienced blocks 7.3 times on average over the first six months of the year.

Figure 4: Experienced a site blocked for sports content - base: consumers of infringing live sports streams in the last 6 months



Audience for live streaming sites down sharply following blocking measures

Analysis of the audience ratings of infringing live streaming websites shows the effectiveness of the blocking measures in place since 1 January 2022.

Following the pandemic and with the resumption of most competitive sport, infringing live streaming has seen a strong

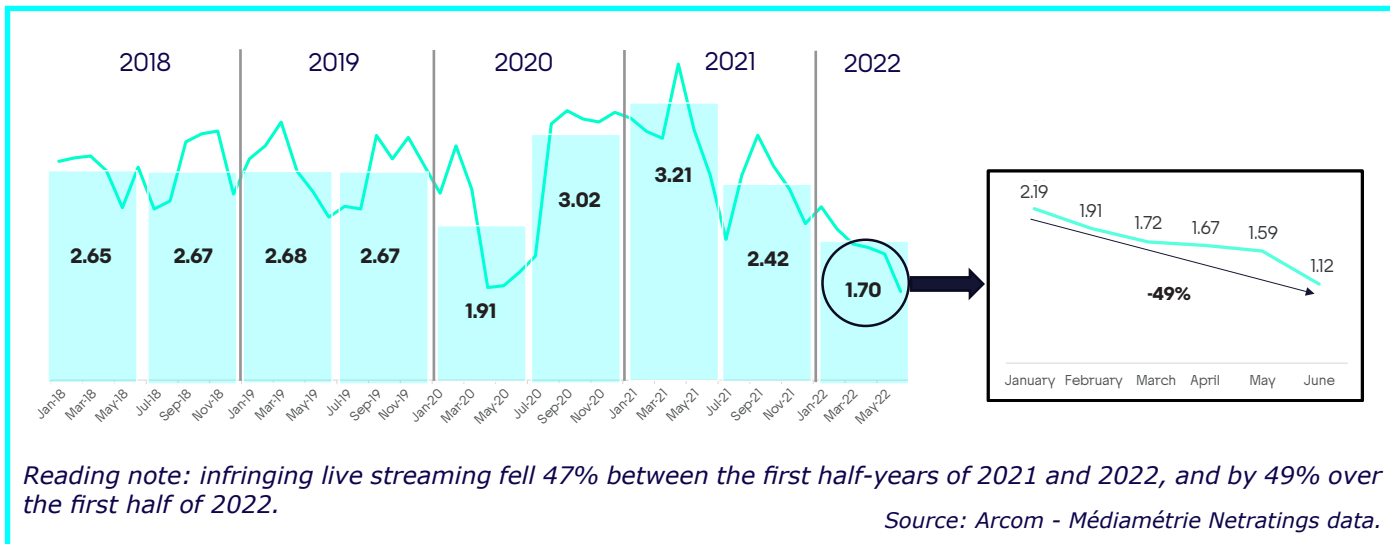
resurgence, reinforced by busier schedules than usual with the holding of events initially planned for 2020 (in particular the men's Euro football tournament in the first half of 2021): up to **3.2 million Internet users visited infringing live streaming sites**

every month on average during the first half of 2021 and 2.4 million in the second half. Between January and June 2022, the overall infringing sports audience decreased by half (down 49%).

N.B.: The infringing sports audience is particularly volatile and must be analysed with care. It remains highly dependent on current sports events and possible changes in legal services on offer.

In the first half of 2022, the audience of infringing live streaming sites was down to an average of 1.7 million users per month, a 47% decrease compared to the same time the previous year.

Figure 5: Live streaming audience, by month and half-year, in millions of unique visitors



The case of implementing blocking for the Champions League in the first quarter of 2022

From the first months of implementation, the measures to block infringing streaming sites have had a significant impact on infringing watching of the Champions League. Websites where blocking measures were applied saw their audience drop by 68% between January and March 2022. This decline has resulted in a reduction in the overall audience for infringing live streamed sports of 37% in the first quarter of 2022. Between February 2021 and February 2022, the infringing audience for the Champions League consequently fell by 76%.

The measures to block illegal sports broadcasting sites have proven effective: the majority of Internet users confronted with these blocks have not persisted with their infringing

viewing, resulting in a drop in the audience for infringing websites.

15% of Internet users experiencing a blocked website switched to legal services and 37% stopped consuming such content; 46% turned to another infringing solution, 12% resorted to solutions to circumvent the blocks

Internet users respond to these blocks in several ways, varying according to their interest in the competitions viewed.

The first reaction is mainly to stop using infringing sites. This applied to 48% of users experiencing a blocked

site, mainly by abandoning the use of an infringing site (37%), if not by switching to a legal alternative, 15% of them having subscribed to a paid sports service.

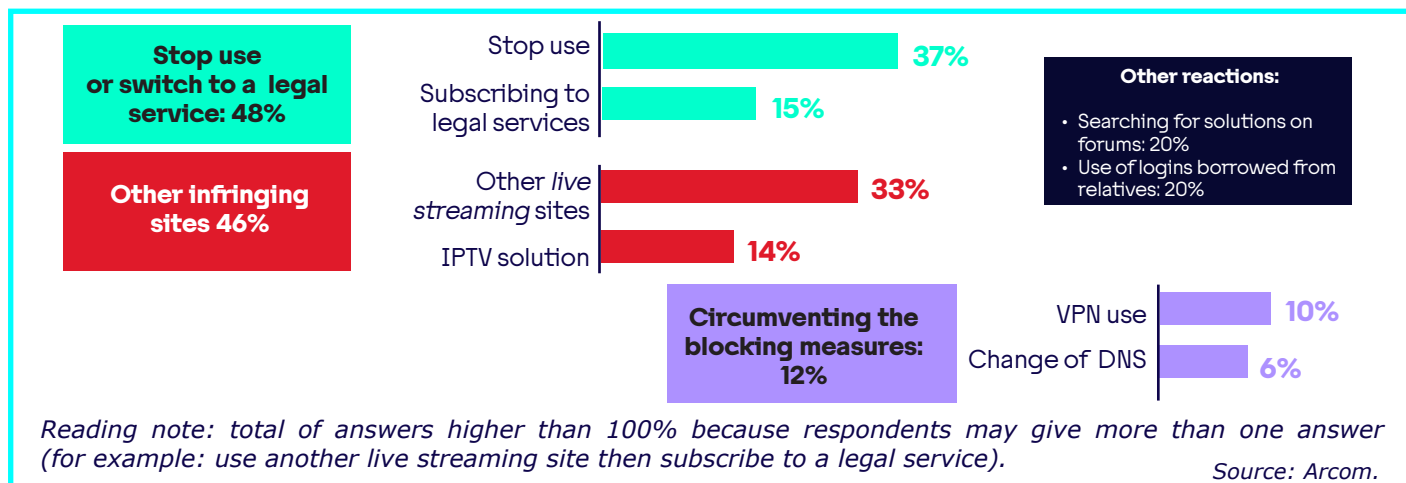
In a more roundabout way, 20% of Internet

users exposed to blocking turned to legal services by borrowing a relative's login to access them.

Slightly less than half (46%) of the Internet users affected report that they have switched to another infringing solution. For a third (33%), it was another infringing live streaming site, and 14% chose to use an IPTV solution.

Lastly, 12% chose a technical circumvention to avoid the situation: 10% used a VPN and 6% changed their DNS (*Domain Name System*).

Figure 6: Reactions to blocking - base: consumers of infringing live sports streams who have encountered blocking (multiple responses possible)



It is therefore advisable to remain vigilant about infringing behaviour by Internet users, particularly in terms of circumventing blocking measures. In addition to Internet service providers, key players in the fight against illegal websites, all parties involved technically in the Internet ecosystem, such as domain name system (DNS) providers, virtual private networks (VPNs) or hosting services,

for example, must be recruited to this fight against piracy. In pursuit of this same objective, new technical solutions, such as the IP blocking developed in several European countries, should be implemented in the medium term.

Key lessons

- 21% of French Internet users have previously viewed infringing sports content and 8% of internet users.
- From 1 January to 30 September 2022, Arcom notified the blocking of 481 domain names. In total, 835 infringing websites have been blocked since the beginning of the year.
- 40% of users of illicit live streaming websites have been blocked at some point in the last six months, with an average of 7.3 blocks in the first half of 2022.
- Almost half (48%) of the live stream users experiencing blocking have turned away from infringing sites: 37% have stopped using them and 15% have subscribed to a legal service.
- 46% of them switched to another infringing solution. 10% used a VPN.
- Between the first half of 2021 and the first half of 2022, the audience for live streaming sites fell by 47% to an average of 1.7 million unique visitors per month (compared to 3.2 million previously).

Methodology / Study conducted in two phases:

- audience reporting study conducted by Médiamétrie based on the Médiamétrie // NetRatings Internet audience on the basis of a panel of 30,000 individuals representative of the French population aged 2 and over (three-screen audience). Measurement of the audience of 1,951 sites offering infringing sports content from January to March 2022 and reprocessing of data from the first quarter of 2022 from a constant sample of 5,620 individuals experiencing a blocking measure in January 2022;
- quantitative study carried out online from 30 June to 20 July 2022 by Médiamétrie on a representative sample of 2,342 Internet users aged 15 or over (representativeness ensured by the quota method: gender, age, socio-professional category, size of town and region of residence in five categories), supplemented by an oversample of 340 consumers of infringing sports sites on live streaming sites.

For further reading: www.arcom.fr

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