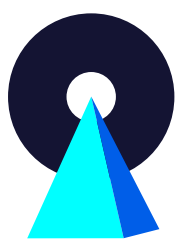


L'essentiel



Strengthening legal practices: 63% of Internet users subscribe to a paid offer, increase in the willingness to pay

After two years marked by the health crisis, 2022 shows a sort of "return to normal" with the reappearance of the trends observed before the crisis: an increase in the online consumption of cultural contents, an increase in subscriptions and the willingness to pay, and a decline in illegal consumption.

implementation of new anti-piracy policies, allowing, among other things, the blocking of mirror sites of infringing sites offering cultural content, but also illegal sports broadcasting sites and the continuation of legal actions undertaken by rights holders.

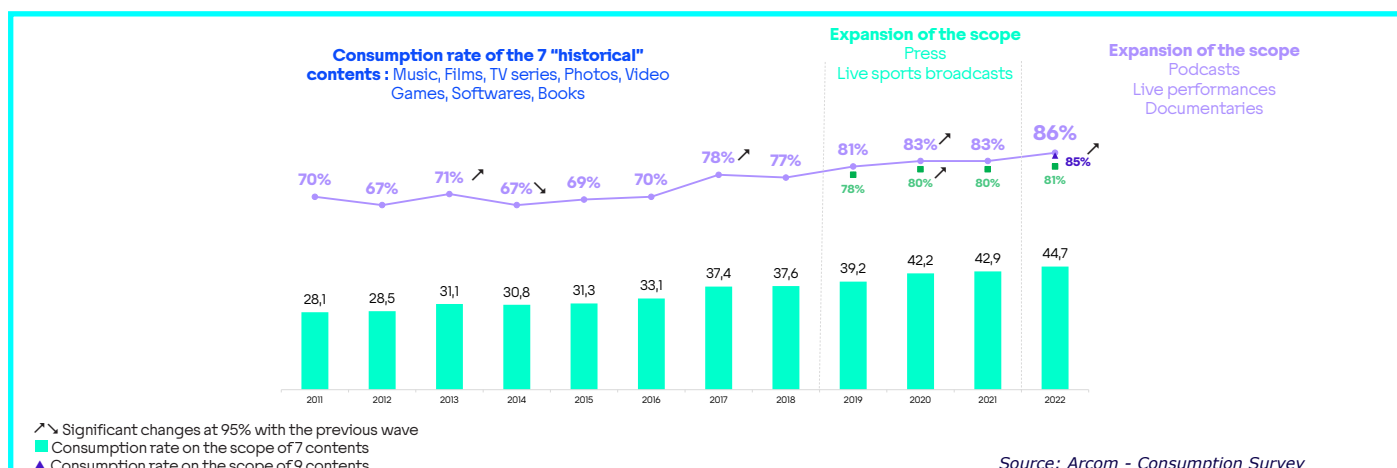
These are positive signals for legal offer this year, which are part of a context marked by the

Online consumption of cultural contents continues to grow

In 2022, 86% of French internet users aged 15 and up have consumed at least one cultural content online over the last 12 months within the scope of twelve cultural contents in this edition, i.e., an increase of two points on a like-for-like basis

compared to 2021 (83% of consumers for the nine cultural goods observed Previously). This represents almost 45 million people.

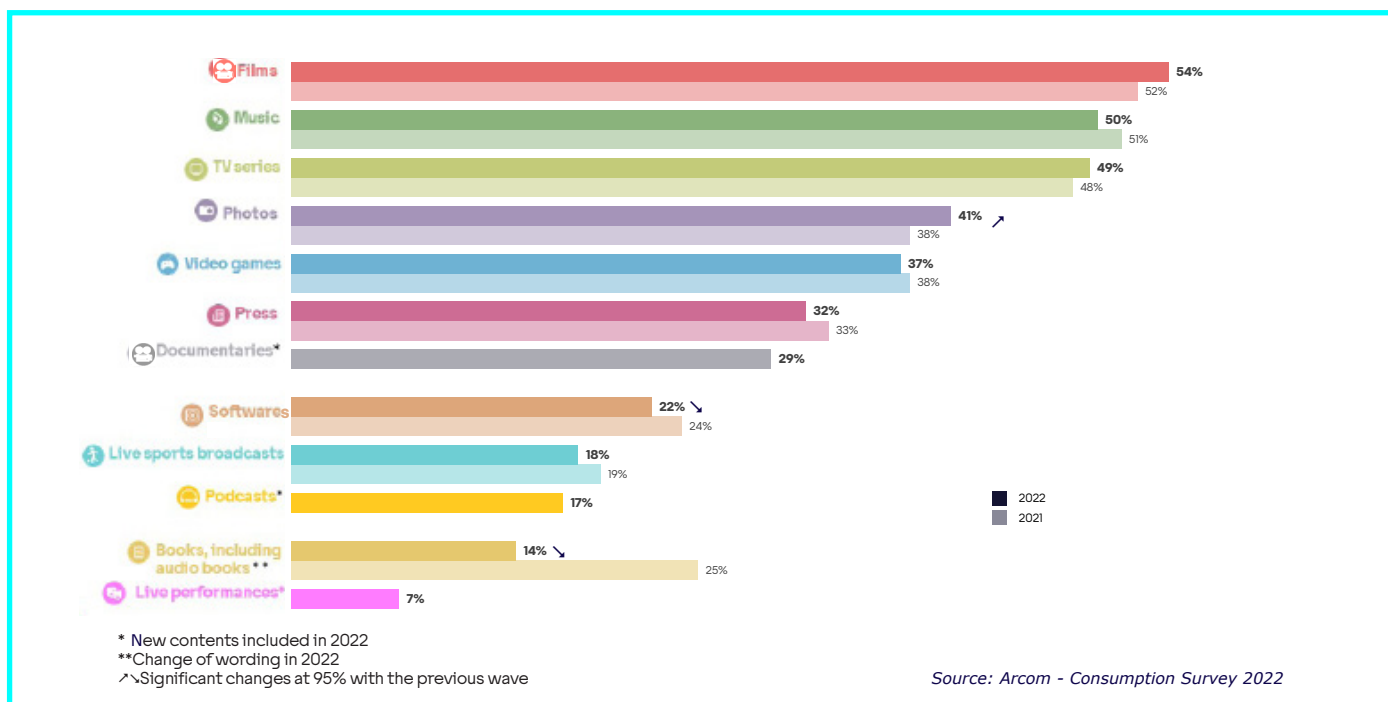
Figure 1: Evolution since 2011 of online consumption in the last 12 months by cultural content - Base: Internet users aged 15 and up



Films (54% of Internet users), music (50%) and TV series (49%) remain the top three cultural contents consumed by Internet users. Photos are the content that shows the strongest growth compared to the previous year (+3 points), while software is losing consumers (down 2 points), a development which should be linked to a lesser presence at home in 2022.

Included in the scope of observation since this year, online consumption of documentaries (29%), podcasts (17%) and even more live performances (7%) concerns a more confidential audience. They rank 7th, 10th, and 12th respectively in terms of consumer penetration of the twelve dematerialised cultural goods surveyed.

Figure 2: Online consumption rate of cultural contents over the last 12 months - Base: Internet users aged 15 and up



Willingness to pay and subscriber rates are rising

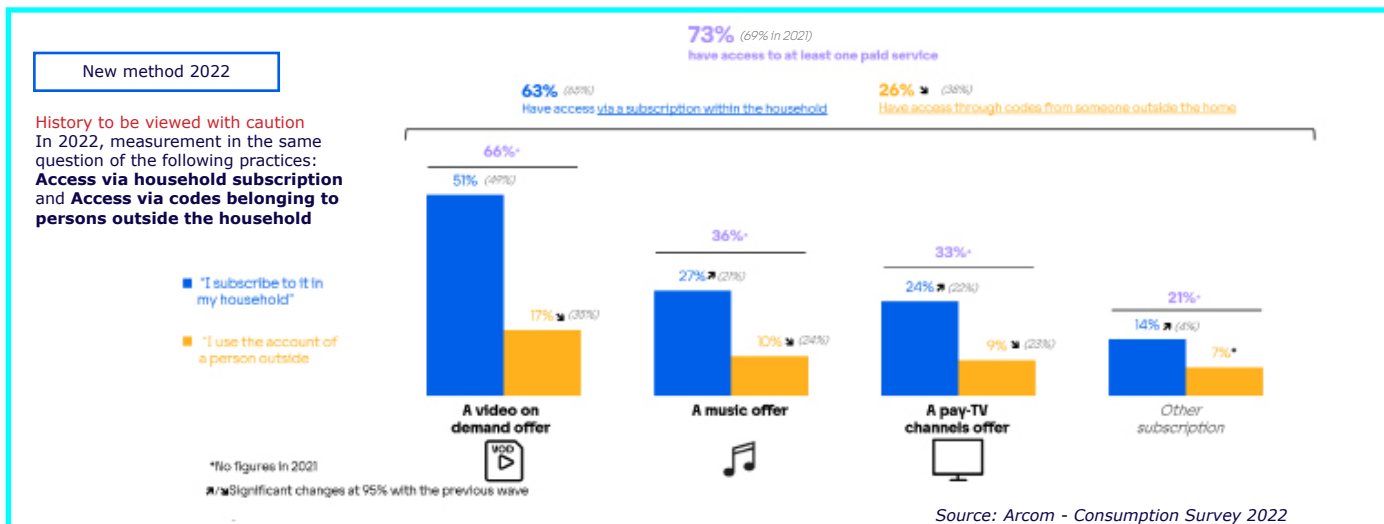
After a period of stability in 2020 and 2021, exclusive-ly legal use started to rise again in 2022. It concerns 62% of Internet users, and almost three quarters (73%) of consumers of online cultural contents. The 40+ age group is the most inclined to such lawful use (65%), while only 12% of 15-24 year olds have consumed such contents exclusively in a legal manner over the past 12 months.

Paid subscription to a video-on-demand (SVOD), music or pay-TV service is the main mode of access to legal consumption. **Nearly three quarters (73%) of French Internet users have access to at least one paid subscription, either within their household or by using codes from someone outside of it.** In particular, 63% of Internet users have access to such subscriptions in their homes.

Access to a SVOD service subscription is the most frequent: two thirds of Internet users (66%) have access to one, and half (51%) within their household, a figure that is stable compared to last year, after several years of increases.

Access to **a music offer** subscription concerns just over a third of Internet users (36%), with a notable increase in subscriptions within the household (27% of Internet users, +6 points). It is thus ahead of subscriptions to a pay-TV offer, which concern a third of Internet users (33%).

Figure 3: Access to paid subscriptions to pay-TV, SVOD and music offers within the household or via access codes from friends and family - Base: Internet users aged 15 and up



Reading note: 51% of Internet users personally, or through one of the members of their household, have subscribed to a SVOD offer/17% of Internet users access a SVOD offer without having personally subscribed, or through one of the members of their household. Comparison with previous years not statistically reliable due to the methodological change in 2022.

In addition to the increase of subscriptions, willingness to pay has developed in 2022. Paid consumption concerns 60% of consumers of digital cultural contents (+3 points on a like-for-like basis), confirming the trend observed for several years.

The increase in the number of paying consumers for online cultural has led to an increase in the average spend per user which has reached €21 per month including free consumers.

On a like-for-like basis, this figure increased significantly by €2.

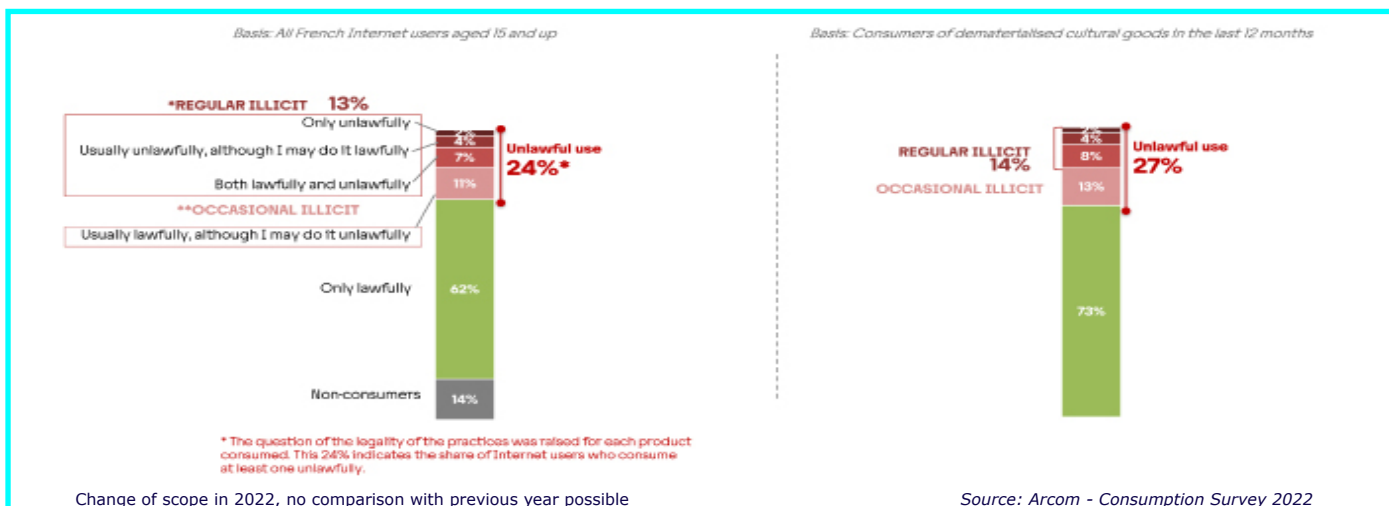
On the other hand, **the average expenditure of paying manque un espee entre consumers et alone remains stable at €32 per month** (i.e., considering the average basket from the first euro spent).

Illegal consumption is decreasing and concerns 24% of French Internet users

In 2022, almost a quarter of Internet users (24%) say they have consumed at least one dematerialised cultural good unlawfully in the last 12 months, i.e., 27% of consumers of dematerialised cultural goods. On (n en minuscule) a like-for-like basis, illegal consumption shows a significant decline, falling by 4 points compared to 2021. This applies in particular to regular illegal consumption, which fell by 3 points.

On a like-for-like basis, this figure increased significantly by €2.

Figure 4: Rate of illegal consumption of cultural goods in the last 12 months



This decrease in illegal consumption concerns for more than half of the contents observed. This is particularly the case for three of the categories of audiovisual content (films, TV series, and sport), which were the most consumed illegally by their consumers in 2021.

Infringing practices in relation to films and series have fallen (down 6 points each) and now concern 23% and 19% of consumers respectively. There was also a clear drop in **illegal music consumption**, which also fell by 6 points (13%) in line with the increase in subscriptions.

In terms of access means, **streaming and direct downloading remain the most frequently used** ways for illegal consumption, by 55% of infringing consumers (+5 points on a like-for-like basis) and 42% respectively. They are followed by peer-to-peer, which will concern just over a quarter (27%, stable rate) of Internet users

in 2022, and social networks (also 27%, -7 points on a like-for-like basis).

More than one in five (21%) infringing consumers use **IPTV**, either via a set-top box or an application. **Finally, live streaming is down sharply this year, in line with the decline in illegal sports consumption:** 11% of infringing consumers use it, 8% on a like-for-like basis compared to 2021, down 8 points. The differences between the two scopes show, however, that sports is not the only category concerned and that live piracy also affects other types of contents such as live performances.

Figure 5: Illegal consumption rate by category of goods - Base: Online consumers of each cultural content



Practices of roundabout access to the legal offer are on the increase

In addition to the infringing modes of access currently used, new illegal practices are developing which allow access to legal offers in a roundabout way.

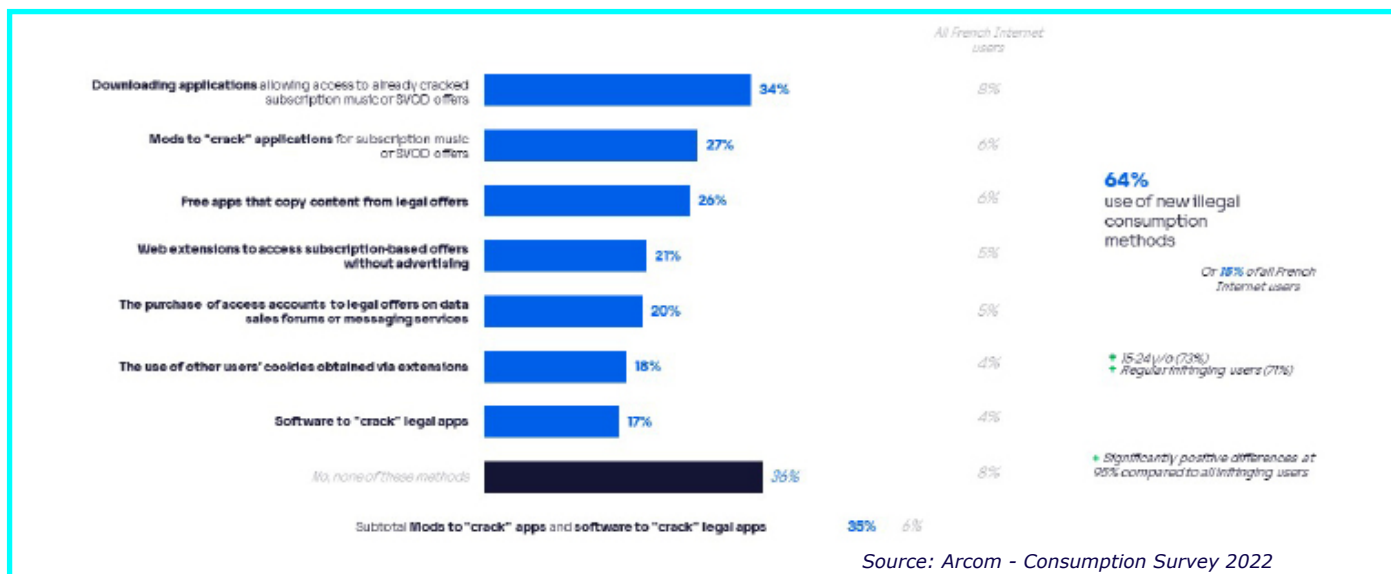
In 2022, 64% of Internet users who consumed at least one cultural good unlawfully on the Internet did so using at least one new method of illegal access to legal services, i.e., 15% of all French Internet users. These new modes can be grouped into two categories:

(27% of infringing consumers), free applications copying the content of legal offer services (26%) and browser extensions offering free, ad-free access to legal offers (21%).

- access to applications and services that have been "cracked" (i.e., where the software code has been modified) or copied from alternative app stores (34% of infringing consumers), the use of mods, i.e., extensions to the codes of an application which make it possible to bypass the user login procedure

- methods related to account hijacking, such as the purchase of third-party accounts (20%) or the use of other users' cookies obtained through extensions (18%).

Figure 6: Use of new means of illegal consumption - Base: French Internet users who have consumed at least one cultural content illegally in the last 12 months



These new forms of illegal consumption of online content are widely varied, but can be gathered into two categories:

- access to cracked or copied lawful applications and services. This practice consists in downloading applications and services whose code has been modified in order to access them without paying and to use their paid features for free;
- accessing spoofed user accounts to legal sites (through the purchase of accounts or the use of cookies).

These different methods of unlawful consumption are made available to Internet users through alternative app stores. The more tech-savvy Internet users can even use dedicated software and crack applications by their own means.

They call for particular vigilance because of their direct impact on the legal offer.

Key lessons

- Online consumption of cultural contents has continued its growth in 2022 to reach 86% of Internet users;
- Paid SVOD, music, or pay-TV service subscriptions remain a major means of access to legal consumption, with 73% of Internet users having access to a subscription, either within their household (63%) or using access codes from their friends and family. Subscription to music offers within the home is up 7 points compared to 2021 (27% of Internet users);
- Illegal consumption has decreased to 24% of Internet users; Films and series illegal consumption, that are used to be the two most contents subject to piracy, have also benefit from this positive evolution;
- Streaming remains the most common practice among infringing consumers, used by 55% of them. Meanwhile, there has been an increase in alternative infringing practices, allowing access to legal offer services in a roundabout way, such as the use of cracked applications, which 19% of French Internet users say they have already use those means.

Methodology/Study conducted in two phases:

- framing phase to determine the socio-demographic profile of Internet users through two waves of the IFOP telephone omnibus survey, from 18 to 25 March 2022, involving a sample of 2,014 individuals aged 15 and up, representative of the French population, representativeness ensured by the quota method;
- quantitative online survey conducted by IFOP among a representative national sample of 5,000 French Internet users aged 15 and up, interviewed online from 26 April to 17 May 2022 (representativeness ensured by the profile resulting from the scoping phase). Three new categories of contents were added to the scope of this edition: documentaries, podcasts and live performances.

For further reading: www.arcom.fr

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