

L'essentiel



Content piracy audience report 2022

In 2022, an average of 9.2 million Internet users visited illegal content websites against 12.5 million in 2021, i.e a fall by 27% in one year. In proportion, "pirates" decreased from 24% in

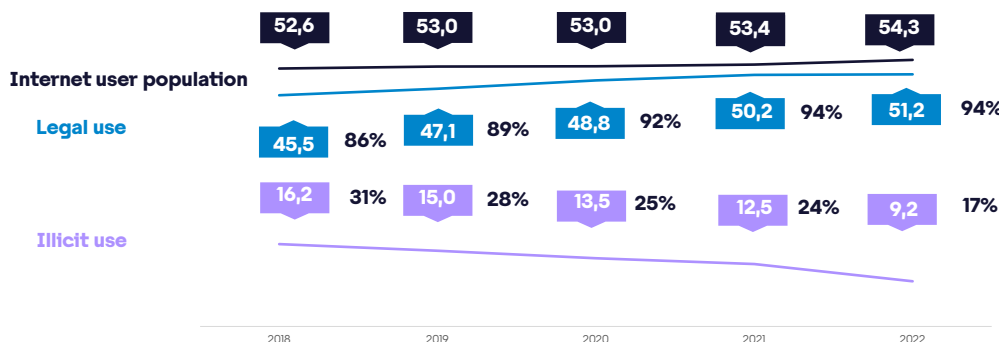
2021 to 17% in 2022, in line with the ongoing trend over the last few years. In December 2022, less than 14% of Internet users visited such illegal websites.

In 2022 illegal websites audience fall reached a record : it dropped by 6 points throughout the year.

In 2022, illegal websites audience continued to decrease : Each month on average 17% of Internet users visited websites or applications displaying illegal contents (against 24% in 2021 and 31% in 2018), i.e. 9.2 million Internet users on average per month compared to 12.5 million in 2021 (down 27%).

At the same time the trend established over several years extended in 2022 : **legal use gained an extra million Internet users** compared to 2021. Each month an average of 51.2 million people accessed a legal website or a legal application in 2022, i.e. 94% of Internet users, compared to 92% in 2020 and 86% in 2018¹.

Figure 1: Change from 2018 to 2022 in the average monthly audience over the year of legal and illegal websites and applications, in millions of internet users – Base: Internet users aged 2 and over.



Note for the reader: in 2022, 51.2 million people legally consumed digital content, i.e. 94% of Internet users.

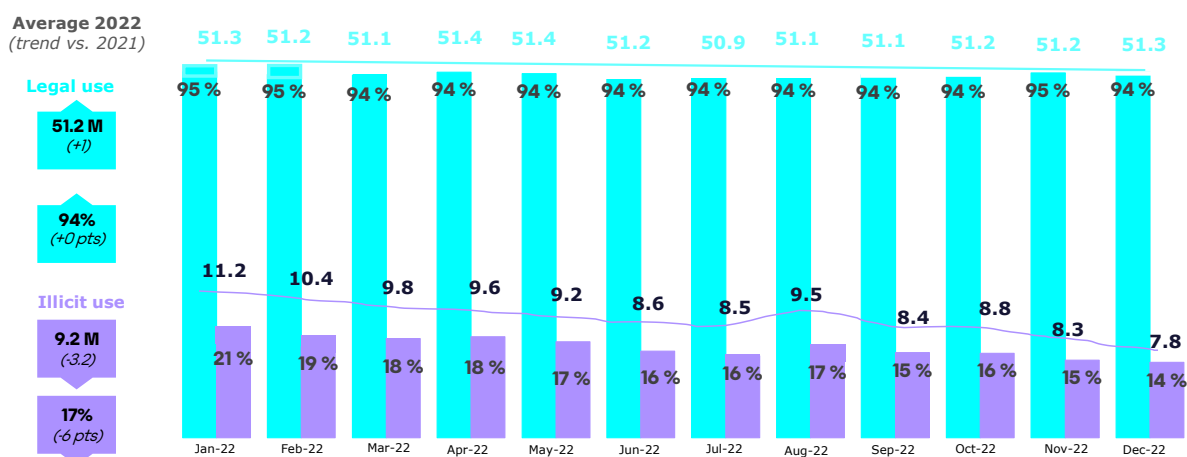
Source: Arcom, citing Médiamétrie//NetRatings.

¹ These figures correspond to monthly averages over the year and could differ from the self-assessed methodology over the last 12 months used in the 2022 Arcom survey of consumption of digital cultural goods. However, the trends observed remain the same.

As in 2020 and 2021, **audiences for infringing websites reached higher levels in the first half of the year than in the second half**, while lawful usages showed little fluctuation. In particular, a peak was reached in January 2022 with 11.2 million Internet users involved. **Infringing usages decreased in the second half of the year**, involving 7.8 million Internet users at the end of the year, i.e. less than 14% of Internet users,

compared with almost 21% in January. This downward trend, combined with the rise in legal practices, reflects the **intense anti-piracy action in 2022**, which now involves efforts from both Arcom and rights holders.

Figure 2: Audiences and penetration rates for legal and illicit usage (January to December 2022) - Base: Internet users aged 2 and over



Note for the reader: in December 2022, 7.8 million Internet users illegally consumed digital content, i.e. 14% of Internet users.

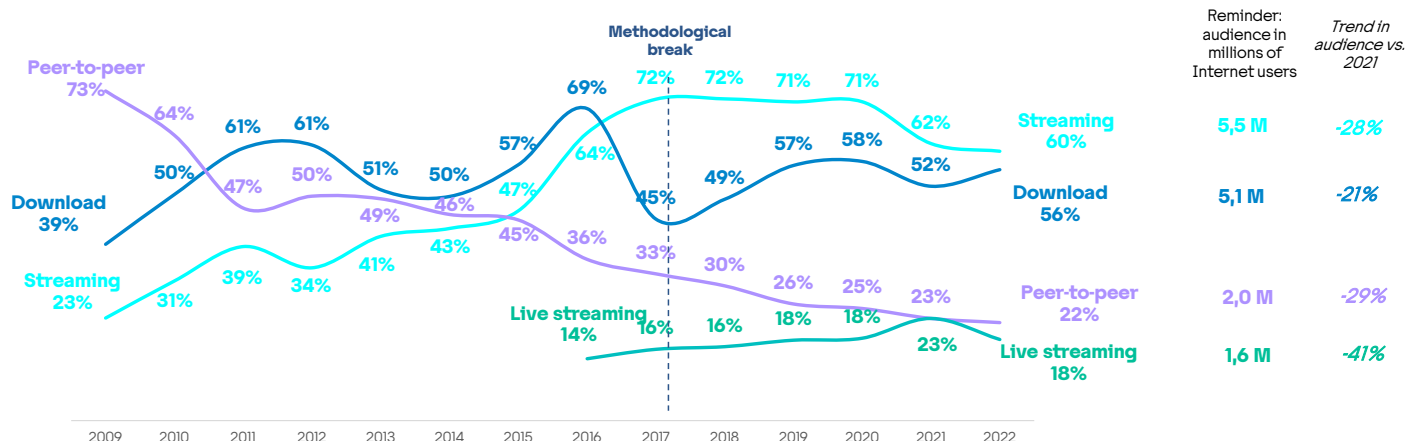
Source: Arcom, citing Médiamétrie//NetRatings.

Streaming is still predominant, and live streaming is falling and now accounts for less than a fifth of the illicit audience.

The decrease of illicit consumption concerns most of the ways used to access infringing content. Streaming lost 29% of its users in 2022 compared to 2021. However, it remains the preferred means for accessing content: 60% of Internet users who accessed infringing content used streaming in 2022 (down 2 points on 2021). **Direct downloading** also experienced a significant drop in the number of users (down 21% compared to 2021). It remains the second most popular access means among Internet pirates (56%, up 4 points on 2021). **Peer-to-peer, the third means for accessing content**, has seen its audience plummet (29% fewer users than in 2021). It now concerns 22% of Internet pirates (down 1 point on 2021).

After having grown steadily for several years, **live streaming** fell for the first time in 2022: 18% of Internet pirates used live streaming in 2022, compared to 23% in 2021. The use of live streaming peaked in 2021 as sports competitions resumed after the health crisis, but the **combined efforts of rights holders and Arcom in 2022** to tackle sports piracy led to a **drop in illicit live streaming practices**.

Figure 3: Breakdown of average monthly audiences for infringing websites and applications by access protocol used (2009 to 2022) - Base: Internet users engaging in illegal practices, aged 2 and over



Note for the reader: in 2022, 2 million Internet users consumed digital content illicitly using peer-to-peer methods, i.e. 22% of Internet users adopting illicit usage.

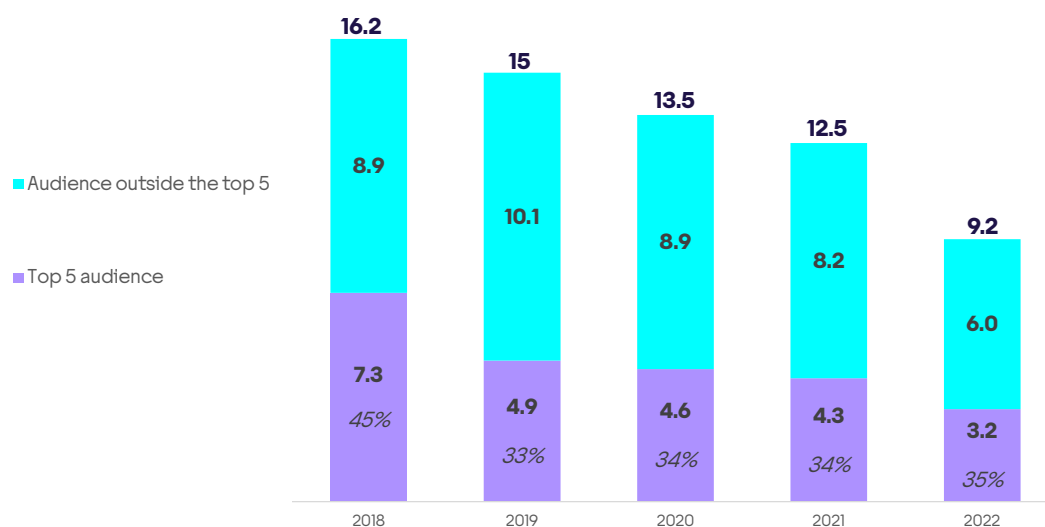
Source: Arcom, citing Médiamétrie//NetRatings.

The share of the top 5 illicit websites remains stable

The audience for illegal websites is still concentrated on a small number of websites. In 2022, the top 5 illicit websites reflected the overall decline in the illicit audience, which lost 25% of unique visitors per month between 2021

and 2022. The share of the top 5 illicit websites has remained relatively stable within the total illicit audience.

Figure 4: Annual change in the audience and penetration rate of the top 5 websites offering infringing content, years 2018 to 2022, in thousands of unique visitors - Base: internet users aged 2 and over



Note: In 2022, the five most visited infringing websites accounted for an average of 3.2 million unique monthly visitors, representing 35% of the total user numbers.

Source: Arcom, citing Médiamétrie and Médiamétrie//NetRatings.

Illicit consumption on computers down significantly in favour of mobile devices

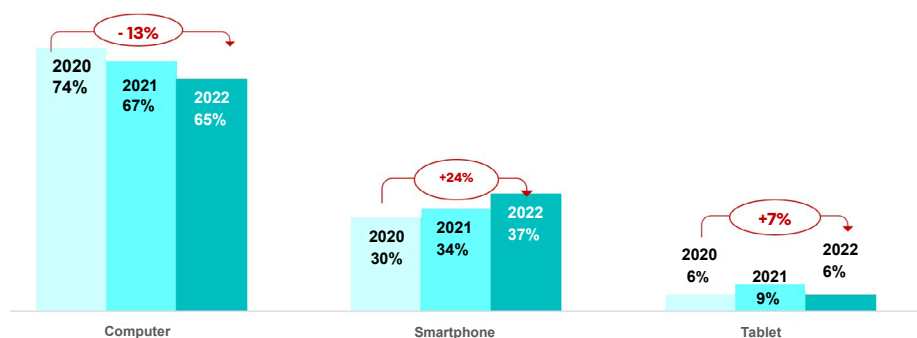
Computers remained the preferred device for accessing infringing content. They are used by 65% of consumers.

Nevertheless, their use fell in 2022 by 2 points, which reflects the trend already seen over the last three years. Over the 2020-2022 period, the number of people using a computer to access illegal websites dropped by 13% (down 16% between 2019 and 2021). **This fall can be explained by the growing number of people using mobile devices.** After rising in 2021, **smartphone** usage continued its upward trend in 2022 and now accounts for more than a third of illicit users (37%). However, following

a surge in use in 2021 (+93% in three years), **tablets** lost 3 points and concerned 6% of illicit consumers in 2022.

The penetration rate of such devices increased from 42% to 56% between 2020 and 2021 as domestic use rose significantly². Tablets have now returned to their 2020 usage levels with a 50% increase in illicit consumer use compared to 2019.

Figure 5: Distribution of illicit audiences by device (December 2022) - Base: infringing websites and applications



Note for the reader: in 2022, 37% of people using illicit websites accessed them from their smartphone.

Source: Arcom, citing Médiamétrie//NetRatings.

²Source: Arcep, Digital survey 2021.

Key lessons

- The audience of websites and applications offering access to illegal content fell by 27% between 2021 and 2022.
- In 2022 on average per month 17% of Internet user accessed websites or application offering infringing content. This proportion is down by 7 points compared to 2021.
- In 2022, legal consumption increased by 1 million internet users compared to 2021 to represent 51.2 million people.
- Streaming remains the preferred means of access : it accounted for 60% of the illicit audience. However, the absolute number of people using streaming decreased by 29% in comparison with 2021. The other means of access have also declined.

- Following the measures taken by Arcom and rights holders to block illicit live streaming websites, the share of live streaming users decreased in 2022, representing less than one fifth (18%) of the illicit audience. However, the absolute number of people using live streaming decreased by 41% in comparison with 2021.
- The top five websites giving access to infringing content accounted for 35% of the audience in 2022. This proportion remains stable between 2019 and 2022.
- Infringing content consumption on computers is declining in favour of mobile devices: smartphones are now used by more than a third (37%) of infringing content consumers.

Methodology

- Restatement of Médiamétrie/Netratings internet audience data based on a panel of 25,000 individuals representative of the internet-using population aged 2 and over. Measure indicator is monthly unique visitors to websites and applications (since 2018: three-screen audience including computers, smartphones and tablets).
- Scope: nearly 8,753 infringing websites and apps offering cultural content (music, films, TV series, electronic books, video games, press, software, photo and sport; before 2018, audiovisual only), identified by Arcom by means of computer scripts and human monitoring. Websites and applications are classified by access protocol(s) to the cultural goods (websites and apps may be multi-protocol); data collected in February 2023, with retrospective effect on previous years' data to account for changes in the base.

For further reading: www.arcom.fr

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