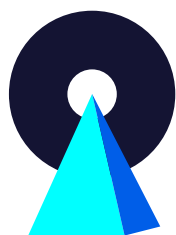


L'essentiel



In 2023, 61% of consumers, i.e. 27.5 million individuals, paid to consume cultural or sporting content online, with an average monthly expenditure of €38.

In 2023, access to digital cultural and sporting content continues to grow in terms of consumer habits, reaching 87% of internet users aged 15 and over, or 45 million people.

Reflecting the popularity of legally accessed content, 61% of consumers aged 15 and over consumed paid-for content in 2023, for an average monthly budget of €38. This represents the biggest increase in average consumer spending in recent years. This development is all the more remarkable in the context of price inflation.

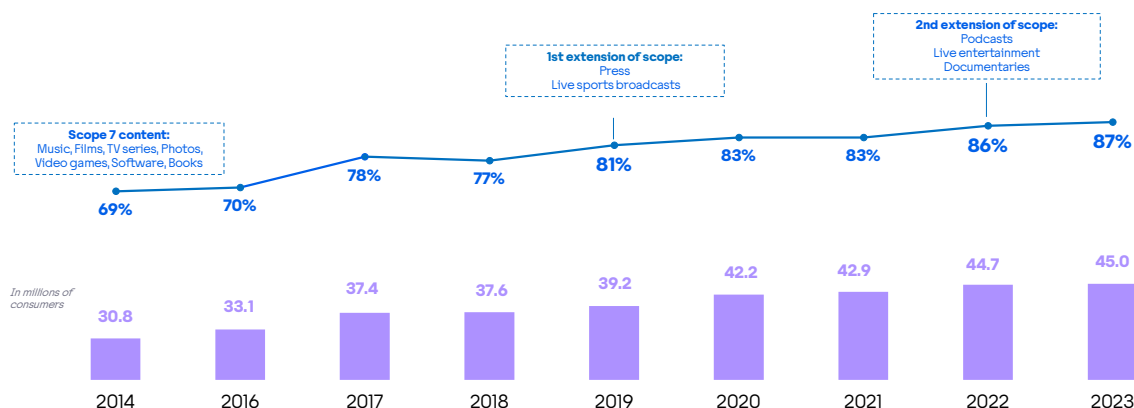
The fall observed in 2022 in the proportion of illegal consumption of digital cultural and sporting content has continued this year (24% of internet users). However, there has been a clear drop in the use of the two main access methods, streaming and downloading, demonstrating the positive effects of the anti-piracy measures implemented in 2022 and 2023.

The consumption of digital cultural and sporting content continues to rise

In 2023, **87% of French internet users aged 15 and over have consumed at least one piece of digital cultural or sporting content in the last 12 months.** This represents **45 million people**, around 300,000 more than in 2022. Of the twelve types of digital cultural and sporting content observed, films (55%), music (50%) and TV series (49%) are still the most popular. Over the same period, documentaries

and podcasts have seen the strongest growth (+2 points), while the proportion of internet users consuming photos (-2 points), press (-3 points), software (-2 points) and digital or audio books (-1 point) has fallen.

Figure 1: Changes since 2014 in the consumption of digital cultural and sporting content over the last 12 months - Base: Internet users aged 15 and over



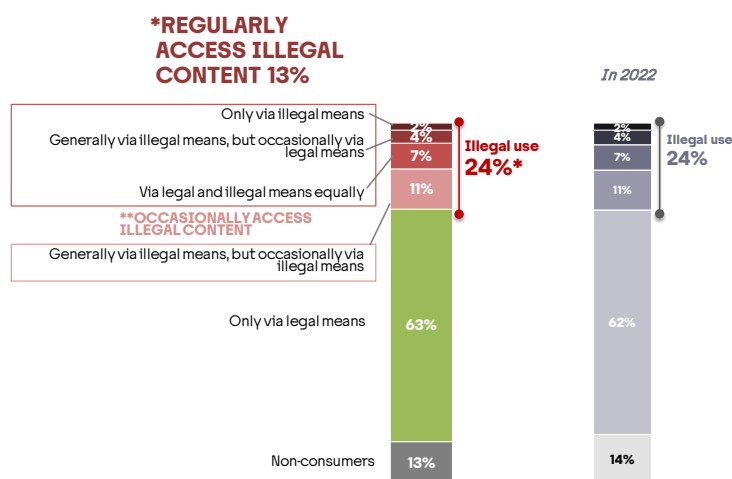
Source: Arcom - Consumer Barometer 2023

Illegal consumption is levelling off and involves almost a quarter of consumers of digital cultural and sporting content

In 2023, a quarter of internet users (24%) say they have consumed at least one piece of digital cultural or sporting content illegally in the last 12

months. This continues the decline seen in 2022.

Figure 2: Rate of illegal consumption of digital cultural and sporting content in the last 12 months - Base: Internet users aged 15 and over



* The question regarding legality was asked for each item of content consumed. This 24% indicates the proportion of internet users who consume at least one item illegally.

Source: Arcom - Consumer Barometer 2023

The 15-24 and 25-39 age groups are the biggest consumers of illegal digital cultural and sporting content (46% and 36% respectively). Conversely, only 16% of 40-59-year-olds and 7% of 60+ year-olds are involved.

This drop in illegal consumption can be found in a quarter of the content categories observed. This is particularly the case for films and music, two of the three content categories with the highest levels of illegal consumption by internet users in 2022 (-1 point each, to 12% and 6% of internet users respectively). While illegal consumption of TV series, the second most pirated content in 2022, remains stable in 2023 within the internet user population (9% illegal consumption), there has been a slight fall among those who consume it (18%, -1 point).

Illegal consumption of live sports broadcasts stabilises, affecting 4% of internet users for the second year running, following an increase in 2021 (6%).

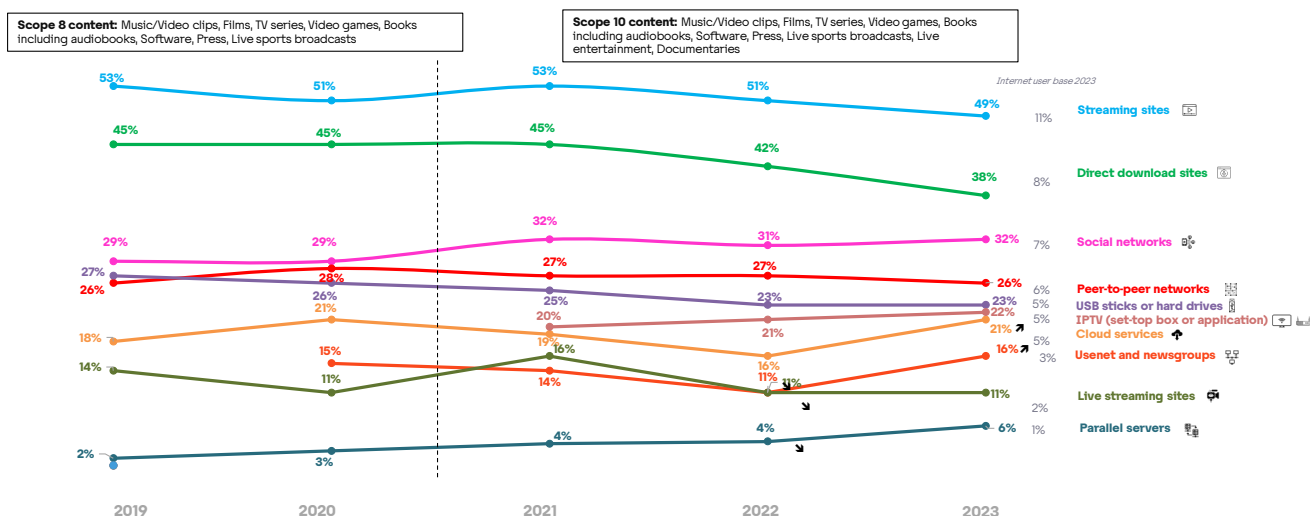
In terms of access methods, despite a fall in their use, streaming and direct downloading remain the most frequently used for illegal consumption, accounting for 49% and 38% of illegal consumption respectively (-2 points and -4 points from 2022). They are followed by social networks (32%, +1 point), which are now ahead of peer-to-peer (26%, -1 point).

Finally, there has been a resurgence in the popularity of cloud services, and Usenet and newsgroups (21% and 16% respectively, +5 points each) which are back to their 2020 levels.

¹ Cloud services enable files to be stored and accessed over the internet. Users of cloud services therefore have no need for physical servers.

² Usenet is a global network created in 1979, enabling the exchange of files between users all over the world. Newsgroups are themed discussion groups that exist within the Usenet.

Figure 3: Changes in illegal consumption methods - Base: French internet users who have consumed at least one item of content illegally on the internet in the last 12 months.



↗/↘ Significant changes at 95% compared with the previous wave

Source: Arcom - Consumer Barometer 2023

Driven by subscriptions, the trend in consumption is towards paid-for content

Despite the pressure on household budgets caused by inflation, paid consumption of online digital cultural and sporting content increased significantly in 2023.

In 2023, 61% of consumers paid to access online content i.e. 53% of internet users. With the exception of films, the propensity of internet users to pay has risen steadily over the past five years, gaining 7 points compared with 2019.

The two types of digital cultural content consumed by the largest number of internet users (films and TV series) are also those for which the propensity to pay is the highest (62 % of their consumers each). Although digital and audio books are consumed by fewer

internet users (13% in 2023), a large proportion of them pay for it (59% of digital and audio book users).

Conversely, almost two-thirds of music listeners (63%), who account for half of all internet users (50%), consume music exclusively free of charge. Finally, photography, the fourth most popular type of content consumed by internet users in 2023 (39%), is the most popular content consumed free of charge (78% of its consumers).

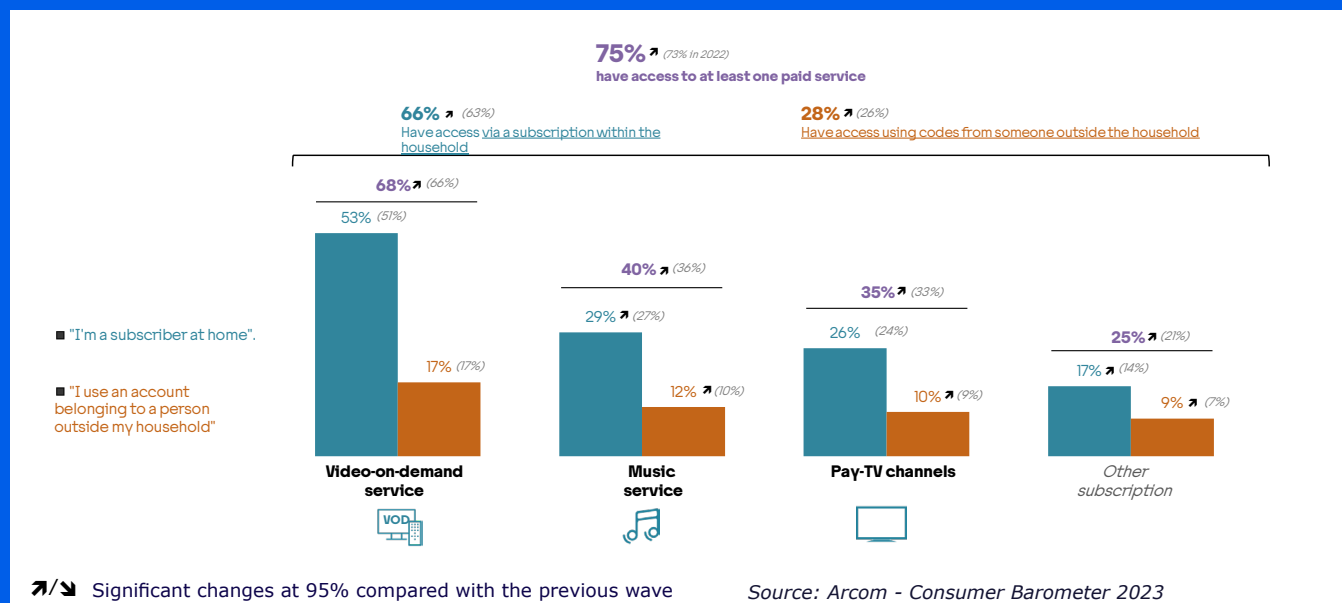
Focus on paid consumption of audiovisual services

Two-thirds (66%, +3 points compared to 2022) of internet users have access to a paid-for content service subscribed within their household in 2023. More generally, three quarters (75%) of internet users have access to a paid audiovisual service, whether by subscription within the household or by borrowing external codes.

Subscribing to a subscription video-on-demand (SVOD) service is the most common: more than half of internet users (53%, +2 points compared to 2022) pay for this service, and more than two-thirds (68%) have access to it. Subscribing to a SVOD service has more than doubled in six years, with the subscriber rate up 31 points since 2018.

Subscription to a music service accounts for 29% of internet users (+2 points compared to 2022), while 40% have access to it, either within their household or via a third party.

Figure 4: Pay TV, SVOD and music subscriptions - Base: Internet users aged 15 and over



Multi-subscription is also on the increase: almost a quarter of internet users (22%, up 1 point on 2022) subscribe to two paid services. The most common combination is music and SVOD (12%).

The increase in the number of paying consumers for digital cultural and sporting content is accompanied by an increase in the average basket, which stands at €25 per month (average for all consumers, including those not paying to access online contents), up €4 compared with 2022.

For paying consumers alone (i.e. taking the average basket from the first euro spent), **spending increases sharply to an average of €38 per month (€6 more than in 2022).**

Key lessons

- Consumption of digital cultural and sporting content continues to rise in 2023. It now accounts for 87% of internet users.
- 24% of internet users are involved in the illegal consumption of digital cultural and sporting content (continuing the fall seen in 2022).
- In terms of digital cultural and sporting content, the illegal consumption of films and music, two of the three most pirated items in 2022, is down by one point each (12% and 6% respectively in 2023). The illegal consumption of TV series, the second most pirated content in 2022, remains stable (9%).
- Streaming and direct downloading remain the means of access most used by consumers who engage in illegal practices (49% and 38% respectively in 2023) but have been declining significantly for several years. Other means of accessing illegal content are increasing, in particular cloud services and newsgroups (+5 points each compared with 2022), which are returning to their 2020 levels.
- Consumers' willingness to pay is increasing: 61% of them paid to access online content in 2023 (+7 points compared with 2019).
- The digital cultural and sporting content for which consumers have the highest propensity to pay are films (62%), TV series (62%) and digital or audio books (59%).
- Average consumer spending increased significantly in 2023: as a whole, consumers of digital cultural and sporting content spent an average of €25 per month (up €4 on 2022). This figure rises to €38 among the population of internet users who spend to consume content (+€6 compared with 2022).

Two-phase methodology

- scoping phase aimed at determining the socio-demographic profile of internet users; i.e. two waves of the Ifop telephone omnibus, from 25 April to 5 May 2023, involving a sample of 2,014 individuals aged 15 and over who are representative of the French population (quota method);
- quantitative online survey conducted by Ifop with a representative national sample of 5,006 French internet users aged 15 and over, interviewed online from 8 to 26 May 2023 (representativeness ensured by the profile obtained during the scoping phase).

For further reading: www.arcom.fr

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