



# PIRACY OBSERVATORY 2022 AND DIGITAL CONTENT CONSUMPTION HABITS



la coalición  
de creadores e industrias de contenidos



## UNIVERSE



Spanish resident Internet users, between 11 - 74 yrs old. Survey with under 16 year old was carried out with prior consent of parent or tutor.

## AREA



National

## TOTAL SAMPLE



3506 interviews

## SAMPLE ERROR



Total at national level n 3506 =  $\pm 1,66\%$ , for a level of confidence of 95%, being  $p=q=0,50$

## TYPE OF INTERVIEW



Online survey, with semi-structured questionnaire, approximate duration of 15 minutes.

## SAMPLING METHOD



Stratified random sampling by conglomerates

## QUALITY CONTROL



Abiding by ISO 9001:2015 standards

## FIELDWORK



Last quarter 2022



---

# 1. Findings

# Reasons for piracy

The main reason for accessing illegal content is because they think they probably would not like the content and, secondly, economic reasons. 5 out of 10 do not know how to distinguish between legal and illegal platforms.



Unit: percentages of those who answer 7-10 in agreement (scale of 0-10)

	2022	2021
I don't pay for content which I might not like after	63 ▲	59
Original content is very expensive, otherwise I would pay for it	57 ▲	54
I can distinguish between platforms which are legal and those which are not	53 ▼	54
I'm already paying for my Internet connection	50 ▼	52
Access to content is fast	50 ▲	47
I can't access contents any other way	36 ▲	33
There are no legal consequences for those who pirate, and everybody does it	34 ▲	32
I'm not harming anyone /industry	29 ▲	24
I can't wait for them to come out on the market	27 ▲	26
To have offline access and not waste data consumption	27 ▼	28

Accessed illicit portals		
11-24 years old	25-44 years old	45-74 years old
68	64	58
55	57	57
60	55	44
51	45	53
54	52	47
45	37	30
43	33	31
42	26	23
37	27	20
38	25	19

If we analyze the different segments according to age:

- the youngest (11 to 24 years old) are clearly economically motivated and report a higher average of distinguishing between legal and illegal channels. They think that they are not hurting anyone and that there are no legal consequences.
- 25-44 years old pirate mainly to avoid paying for something they don't like, to be able to access content they can't otherwise, and the urgency to access new content.
- Those aged 45 and over are the least likely to distinguish between legal portals; their main motivation for consuming illegal content is because they are already paying for their internet connection.

Unit: percentages // Base: Consumers of free digital content (2022 (n=1492); 2021 (n=1444))

▲ Higher than 2021  
▼ Lower than 2021

XX Higher than Total  
XX Lower than Total

# Identifying an illegal portal or platform

Half of the individuals identify the legality of a portal or platform by looking at whether the company's contact details are available. 25% consider a platform legal if they show known payment methods with logos and 24% consider legal those that ask you to register or where you must give your information.



## How do you identify whether a portal or platform is legal?

Unit: percentages

2022

When the company's contact details (physical address and telephone number) are available on the portal	47
When known payment methods with logos are displayed	25
I am asked to register, or I must give my information	24
A payment has to be made, and prices are indicated on the same portal.	19
Advertising of reputable brands (Corte Inglés, Telecommunication companies, Automotive ....) is displayed.	18
Because it appears in the first positions in the search engine.	15
They are in groups of a Social Network (Facebook, Telegram...).	7

### Accessed illicit portals

	11-24 years old	25-44 years old	45-74 years old
	44	51	47
	27	30	22
	22	21	29
	20	21	18
	22	18	17
	20	15	12
	9	7	7

Younger people are more likely to identify a legal portal because of the payment methods (known logos and payment for content), and because the brands advertised are reputable, and these websites appear in the top positions of the search engine, while those over 45 identify them because they are asked to register.

Unit: percentages // Base: Consumers of free digital content 2022 (n=1492)

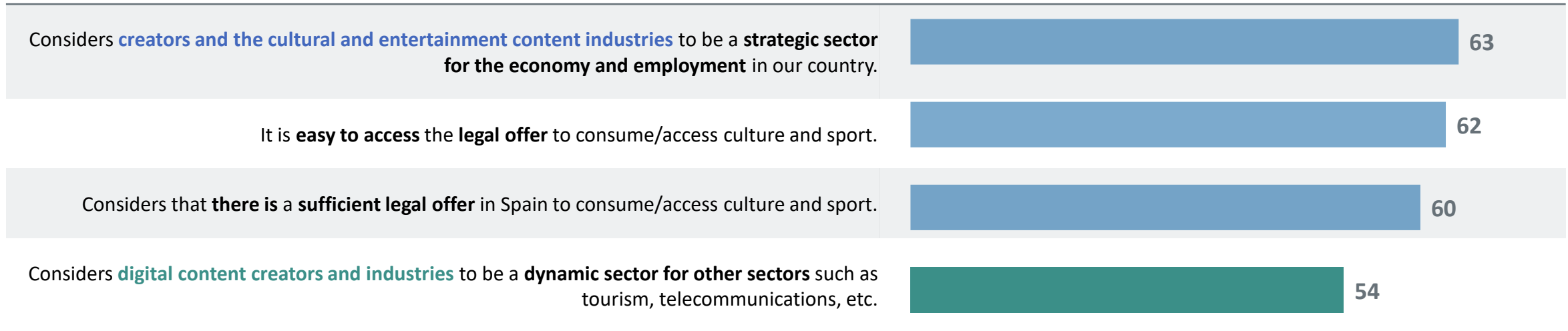
XX Higher than Total  
 XX Lower than Total

# Perceptions of creators and the cultural and entertainment industries

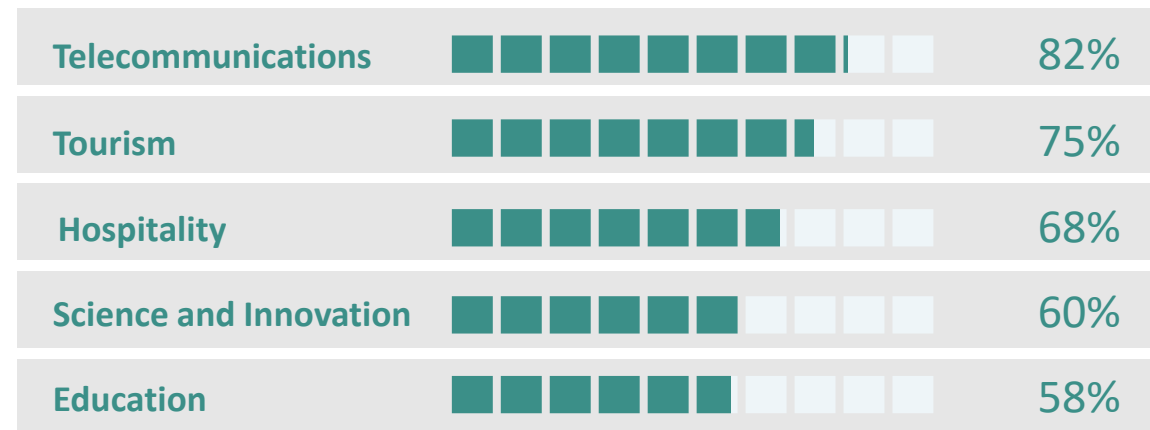
63% of consumers of free digital content consider the creators and industries of cultural and entertainment content to be a strategic sector for the economy and employment in our country. Telecommunications and tourism are the industries that benefit the most.



Degree of agreement (6-10). Scale 0-10



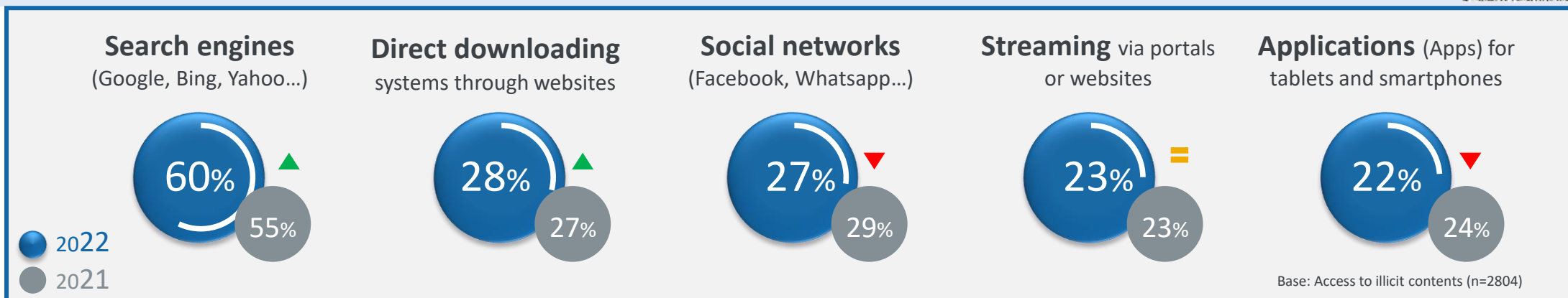
## Which sectors do you see as empowering digital content creators and industries? (A LOT + ENOUGH)



Unit: percentages // Base: Consumers of free digital content 2022 (n=1492)

# How do they access illicit contents?

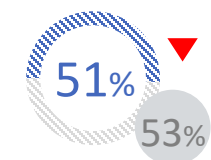
The main access is through search engines (Google), followed by direct download and social networks. When they access the free content website from search engines, half of them look for reviews of it. The majority tend to choose one of the top twenty options.



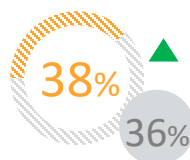
## What is your protocol for accessing illegal content via search engines?

### How do you choose the website you want to go to?

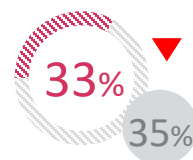
It usually chooses one option out of the top twenty.



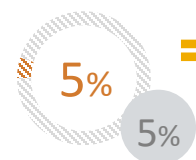
Before entering this website for downloading, usually look at reviews of the site.



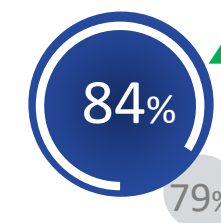
Look for websites that only have specific content, e.g. only films, only music.



Search for websites with all kinds of content (music, films, etc.).



Others

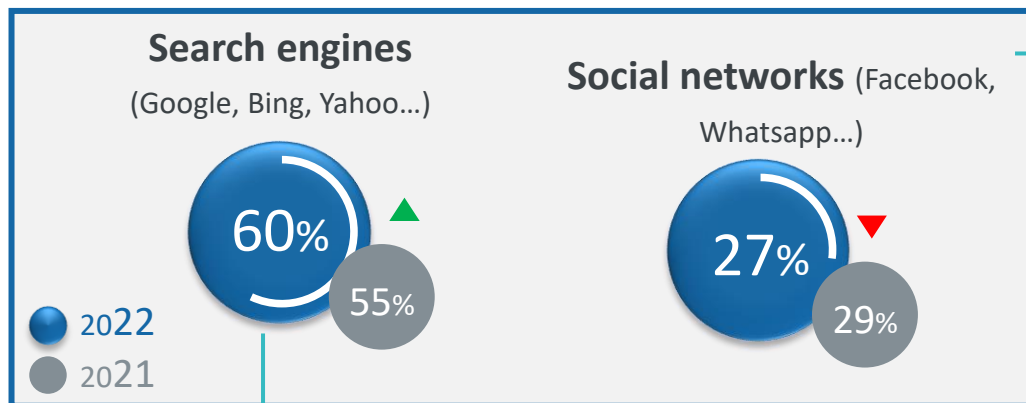


Unit: percentages // Base: Consumers of free digital content 2022 (n= 1492); 2021 (n=1444)

▲ Higher than 2021  
▼ Lower than 2021

# How do they access illicit contents?

Google is the most widely used by the vast majority to access illegal content. Among those accessing from social networks, Facebook, YouTube and Telegram are the most used, with an increase in the last year in the use of Telegram and Instagram.



## What social networks do you use to access these portals?

	2022		2021
Facebook	45%	▼	46%
YouTube	37%	▼	38%
Telegram	37%	▲	33%
Whatsapp	30%	▼	31%
Instagram	28%	▲	26%
Twitter	22%	▼	23%
Discord	8%	▲	-
Dailymotion	8%	▼	9%
Reddit	6%	▲	-
Others	11%	▼	13%

Base: Have used a social network to access the portal (n=837)

## Which search engine do you use to find these portals?

	2022		2021
Google	94%	▬	94%
Yahoo!	5%	▼	7%
Others	11%	▼	15%

Base: Have used a search engine to access the portal (n=1599)

Unit: percentages // Base: Consumers of free digital content 2022 (n= 1492); 2021 (n=1444)

▲ Higher than 2021  
▼ Lower than 2021



# How illicit portals are financed | Obtainment of personal data

63% of consumers of free content state that they need to register with the portals to access the content, and the amount of data they are asked for, especially email, is increasing. The risk here is that providing their personal data could be used, for example, for subsequent sale to third parties and used in spam and phishing campaigns, or for possible social engineering attacks, depending on the amount of data provided. Only 3 out of 10 are confident in providing this data.



▼ **63%** had to register in a portal 2022

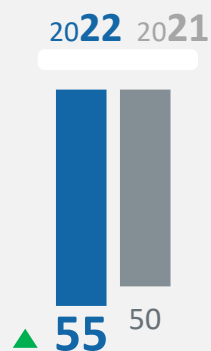
66% had to register in 2021

Base: Access to illicit contents (n=2886)

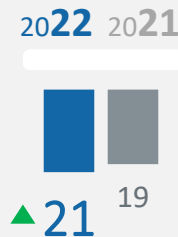
## What details did they have to provide?



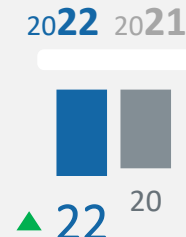
E-mail



Opinion questionnaire (\*)

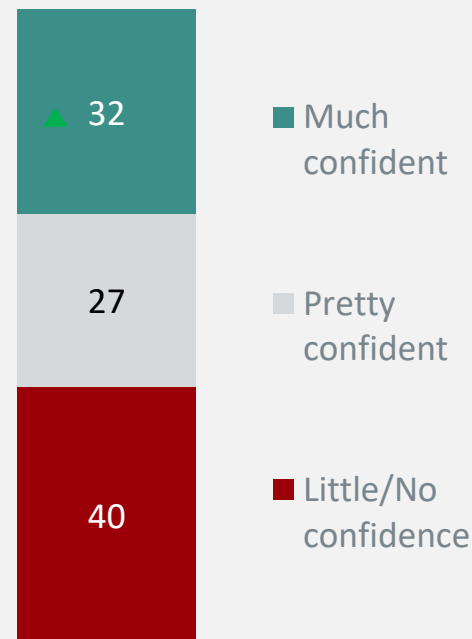


Telephone



Base: Had to register as a user (n=2301)

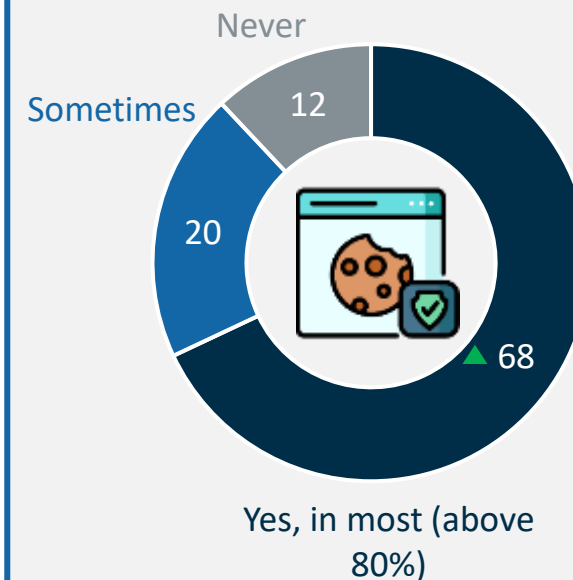
## What degree of confidence gives you to provide this information?



Base: Had to provide email, telephone or opinion questionnaire (n=2234)

▲ Higher than 2021  
▼ Lower than 2021

## Do you remember being asked accept cookies when you acceded to these contents? (%)



Base: Access to illicit contents (n= 3641)

(\*) Opinion and consumer attitudes questionnaire

Unit: percentages // Base: Free digital content consumers 2022 (n= 1492); 2021 (n=1444)

# How illicit portals are financed | Advertising

9 out of 10 consumers of illegal content have accessed portals with advertising, not only advertising for gambling or dating websites, but 3 out of 10 report seeing advertising on these portals for top brands. Even so, half of them are annoyed by this type of advertising, in fact, 15% are embarrassed by this advertising and consider it harmful.



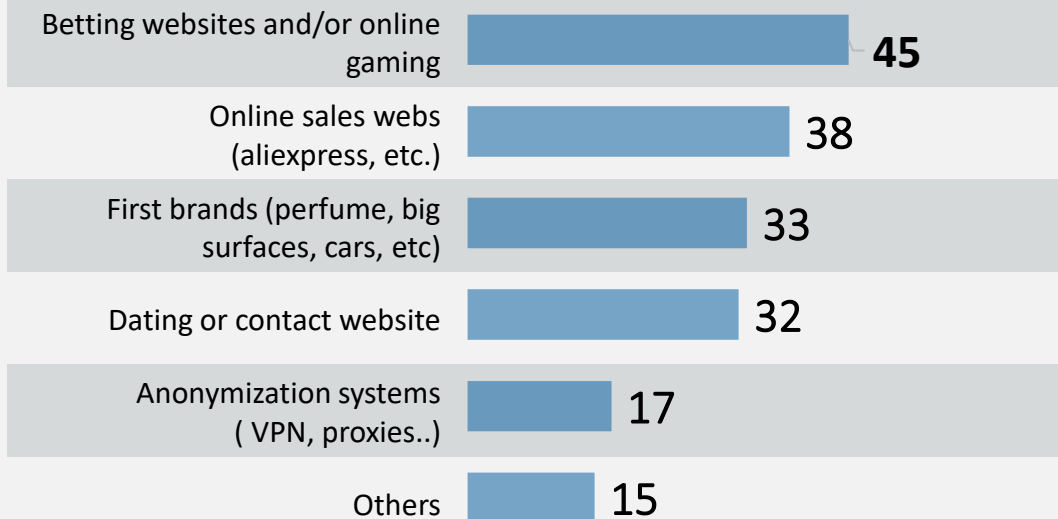
## ▲ 91% have accessed portals with advertising

Base: Access to illicit contents

have accessed portals with advertising

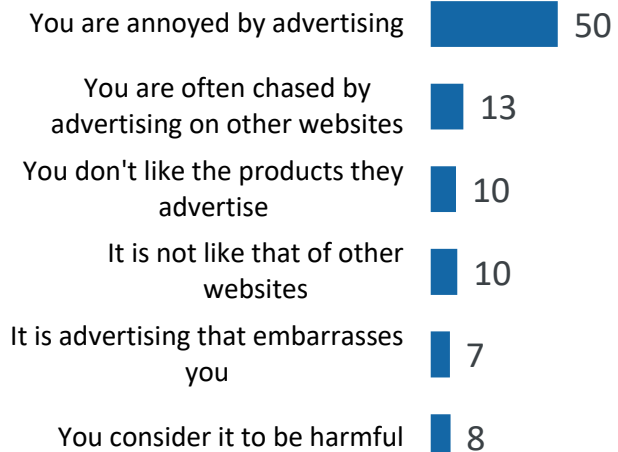
Advertising they recall

2022



Base: Declare that the portals have advertising (n= 3302)

## Advertising perception



Since you have been using this type of website, do you notice that you receive more advertising or spam in your email, smartphone, tablet, etc.?

Get more spam and advertising

59%

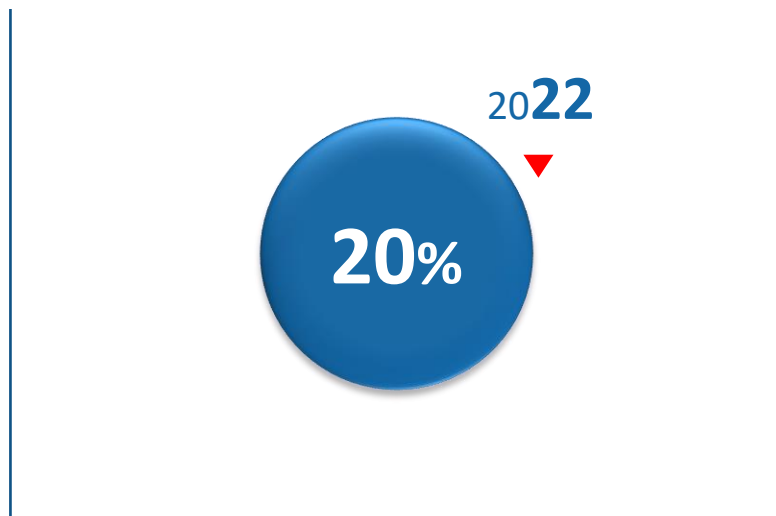
Unit: percentages // Base: Total internet users (n=3506)

# How illicit portals are financed | Payment methods

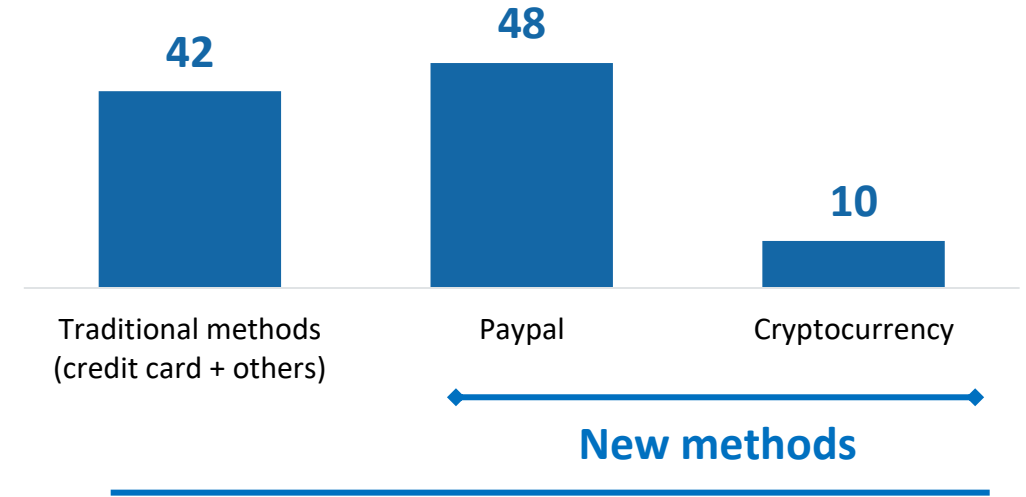
20% of Internet users who have accessed illicit portals have paid for the consumption of some content. The main methods of payment are credit card and PayPal.



### Have you ever paid for the content you have accessed on these pages?



## Payment method



### Use cryptocurrency as a payment method

Base: Use cryptocurrency as a payment method (n= 127)

Often pays for other services with cryptocurrencies

33%

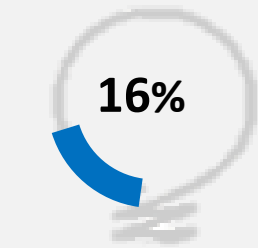
Gives more security to pay with cryptocurrencies on such portals

46%

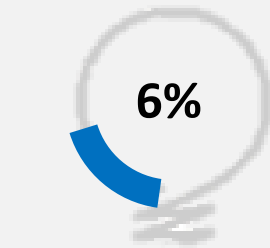
# Tutorials to learn how to download content

36% of internet users have used tutorials, mainly to learn how to download content. 2 out of 10 have an IPTV decoder.

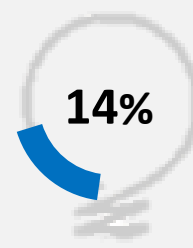
## 36% have used tutorials



Download content

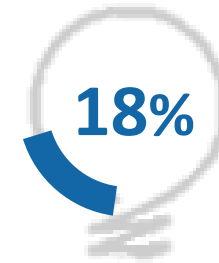


Get/use platforms  
(VPN, IPTV, Cardsharing console)



Both

## EQUIPMENT



Has IPTV decoder



Have accessed a VPN  
for personal use

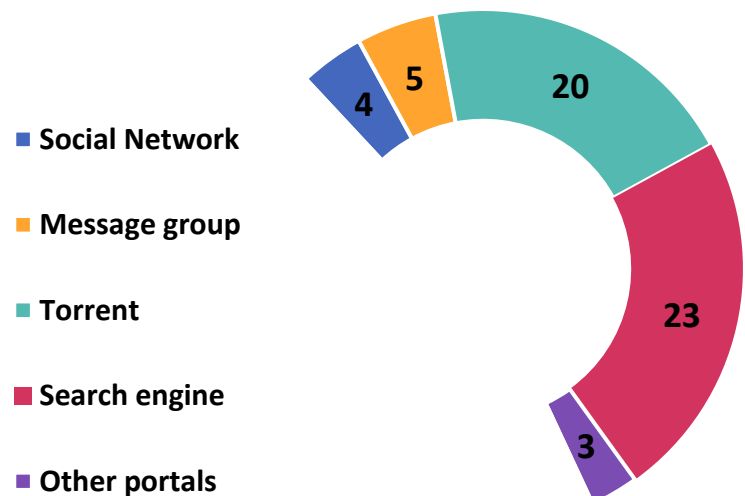
# Content portals

One in two consumers have tried to access an illegal content portal that had been closed or no longer exists. The portals to which they are redirected are mainly Torrent-type portals.

## CLOSED CONTENT PORTALS

▲ **55%** have tried to access a content portal that turned out to be closed / did not exist.

Where in particular were you looking for content, when you were unable to access?



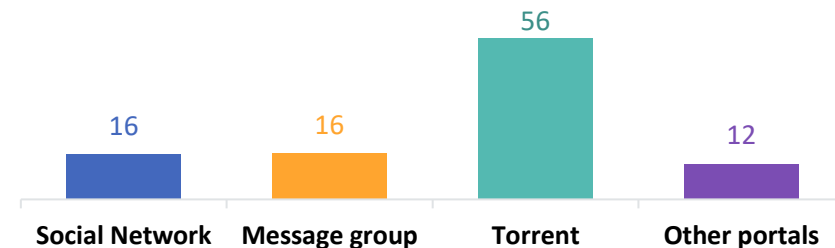
The reasons for the closure was explained



Was directed to another site



Where were you redirected?

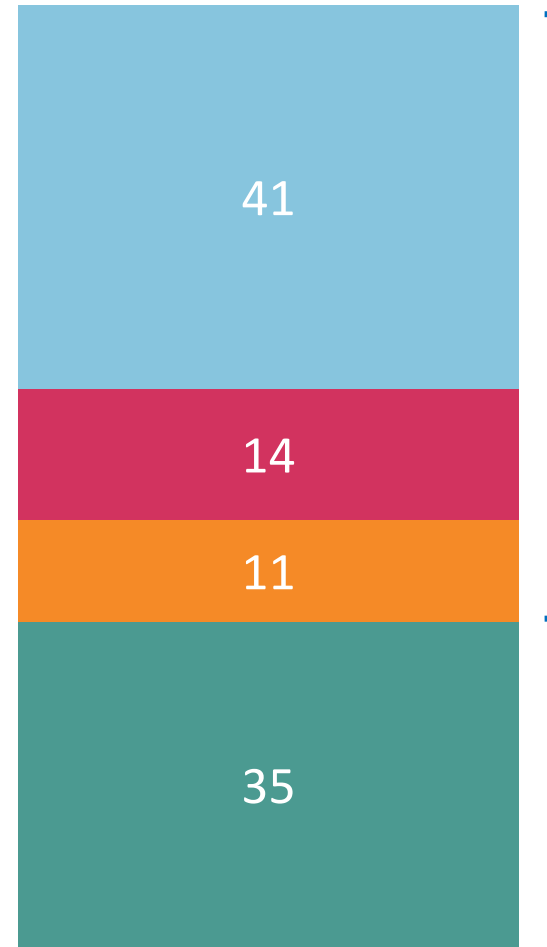


▲ Higher than 2021  
▼ Lower than 2021

# Incidents when downloading **ILLEGAL** content

65% of users who had an incident could not solve it, mainly because they could not find a way to do so.

- I have not been able to, I have not found how to do it
- The form did not work
- I have contacted but have not heard back
- It was simple and they sorted it out



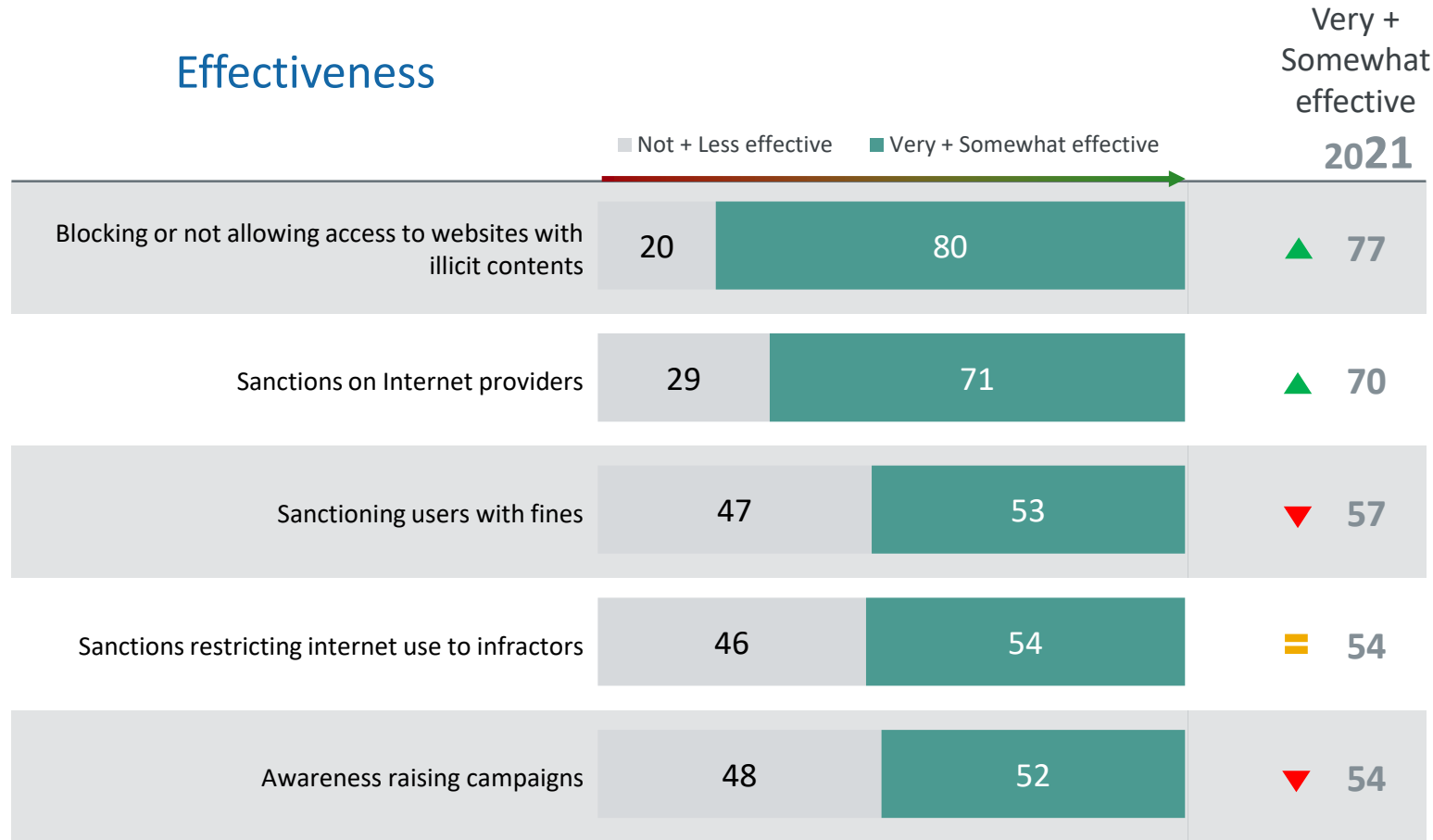
**65%** of users of illegal content who had an incident were unable to resolve it, mainly because they could not find a way to do so on the site from which they accessed it, because the form they had available did not really work and those who actually filled it in did not receive a response.

Unit: percentages // Base: They have had an incident and have tried to contact: 2022 (n=865); 2021 (n=881)

# Effectiveness of measures against piracy

The most effective measure is still considered to be to close/block access to the illegal content website.

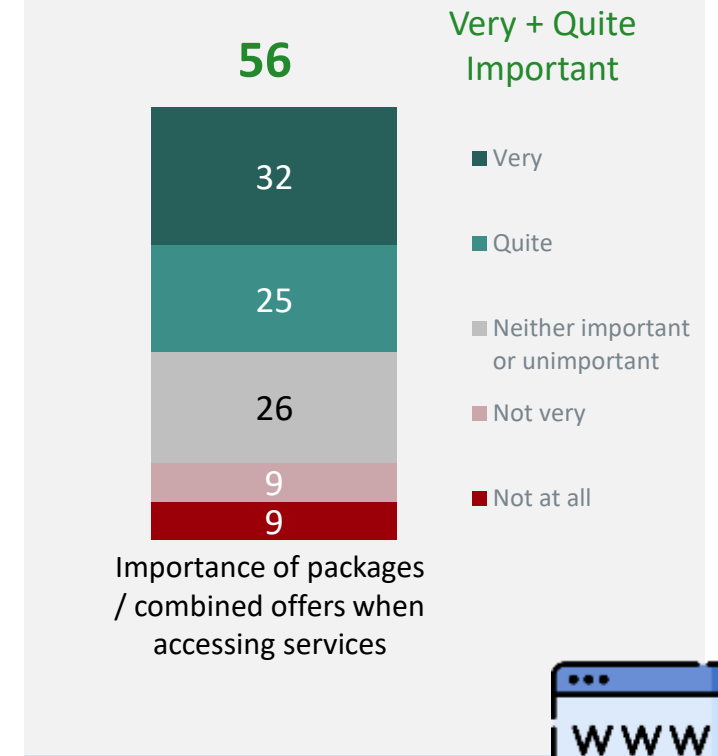
## Effectiveness



▲ Higher than 2021  
▼ Lower than 2021

Unit: percentages // Base: Base: Total internet users: 2022 (n=3506); 2021: (n=3422)

## Importance when hiring an Internet access service



Importance of packages / combined offers when accessing services

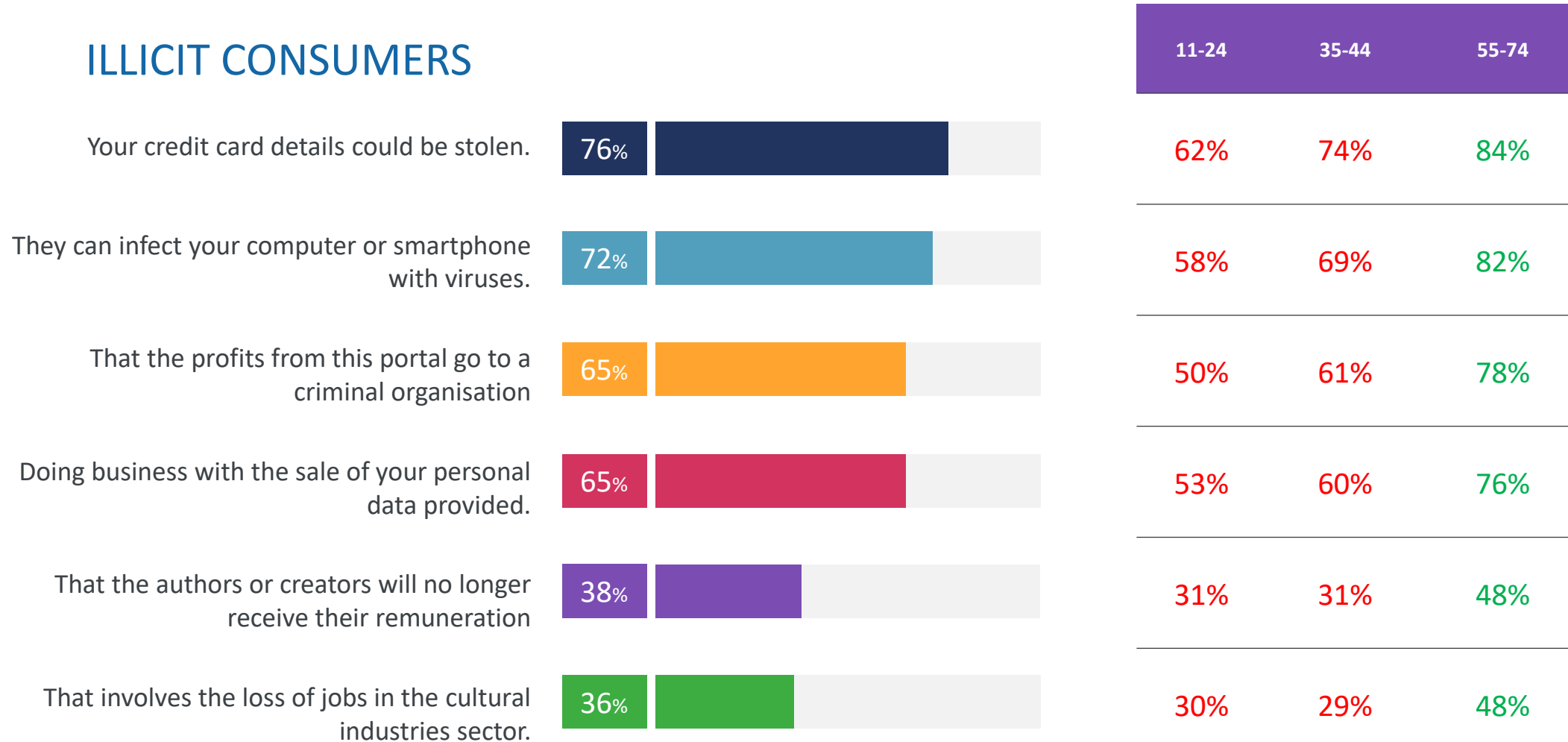


# Reasons why I would definitely stop consuming free digital content

The main factors that would motivate people to stop consuming free digital content would be the potential fraud or cyber-threats, with younger people being the least motivated to stop consuming such content.



## ILLICIT CONSUMERS



Unit: percentages // Base: Base: Total internet users: 2022 (n=3506)

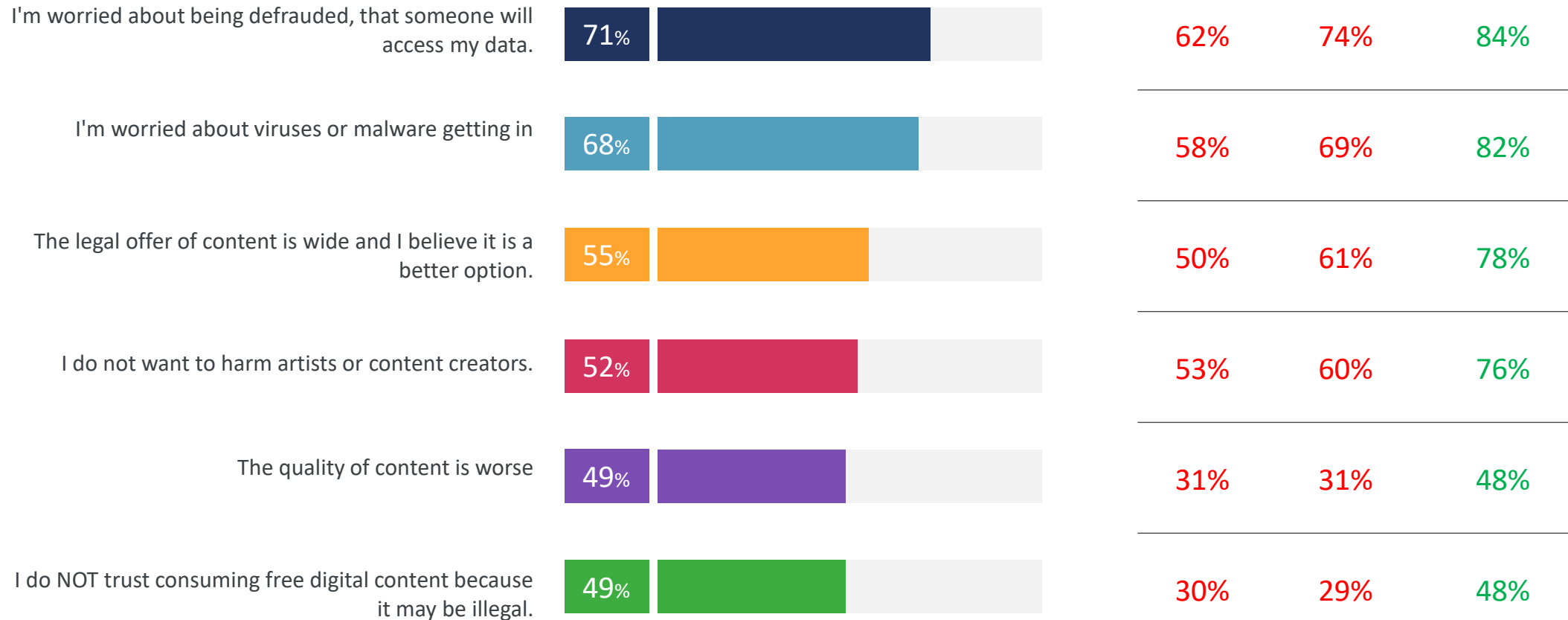


# Main barriers to entry to the consumption of free digital content

The main barriers to not consuming free digital content are fear of fraud and cybercrime, especially for older people. For 16-34 years old, the quality of content and concerns about consuming illegal content are the main barriers to consuming free content.



## NON-CONSUMERS OF DIGITAL CONTENT



Unit: percentages // Base: Base: Total internet users: 2022 (n=3506)

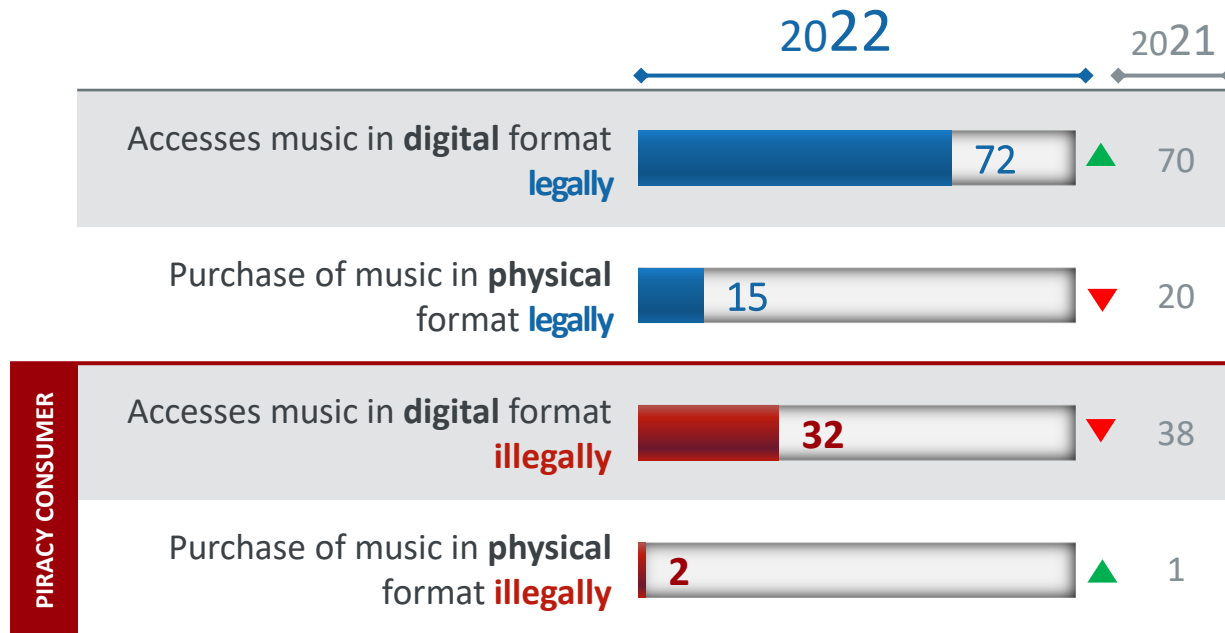


---

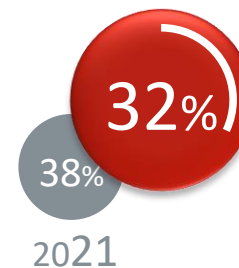
## 2. Access to contents



# Music | Summary



Piracy consumers  
in **physical** or  
**digital** format

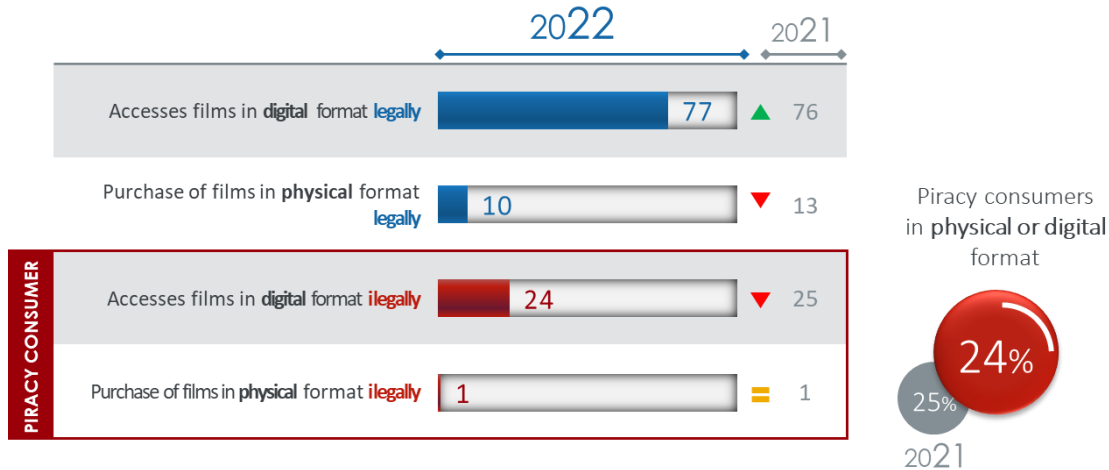


The number of illegal music consumers is decreasing and the number of legal digital music consumers is increasing.

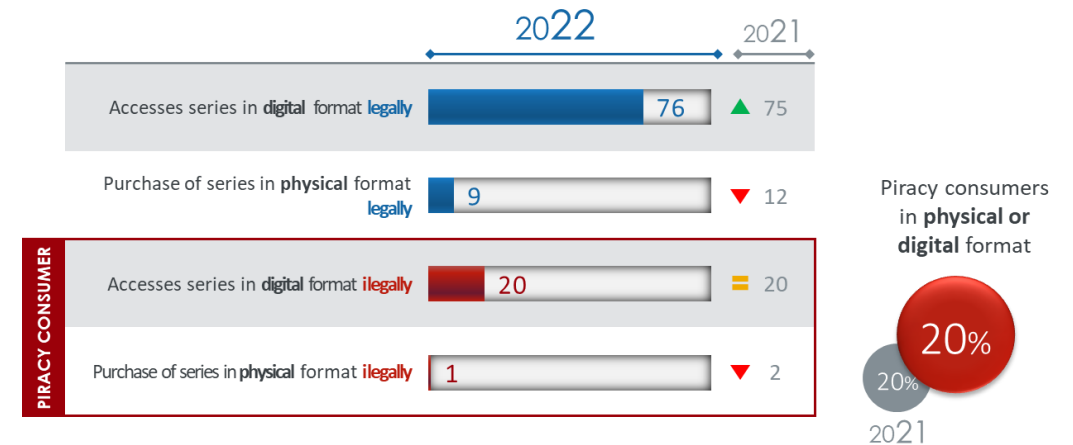


# Films and Series | Summary

## Films



## Series



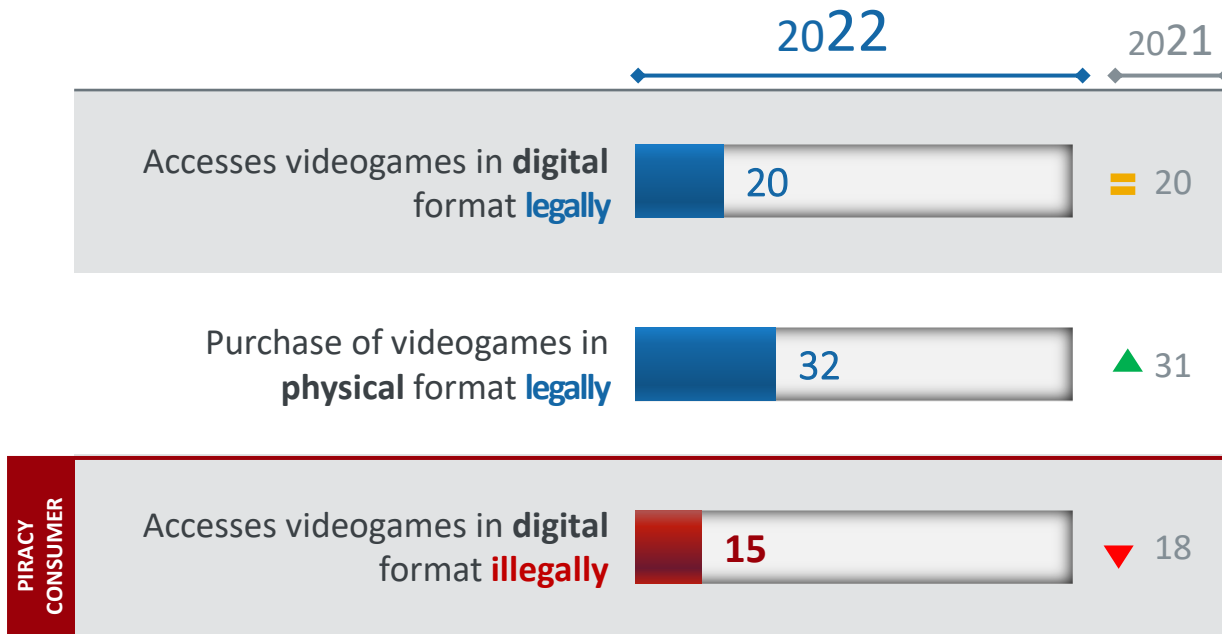
Legal consumption of physical films and illicit consumption are decreasing, while legal digital consumption is increasing.

Digital consumption of series on illicit portals is maintained, while legal digital consumption is on the rise

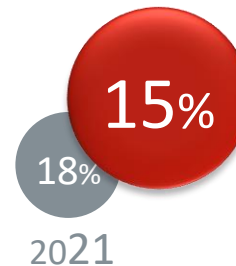
Unit: percentages // Base: Base: Total internet users: 2022 (n=3506); 2021: (n=3422)



# Videogames | Summary

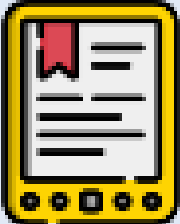


Piracy consumers in digital format

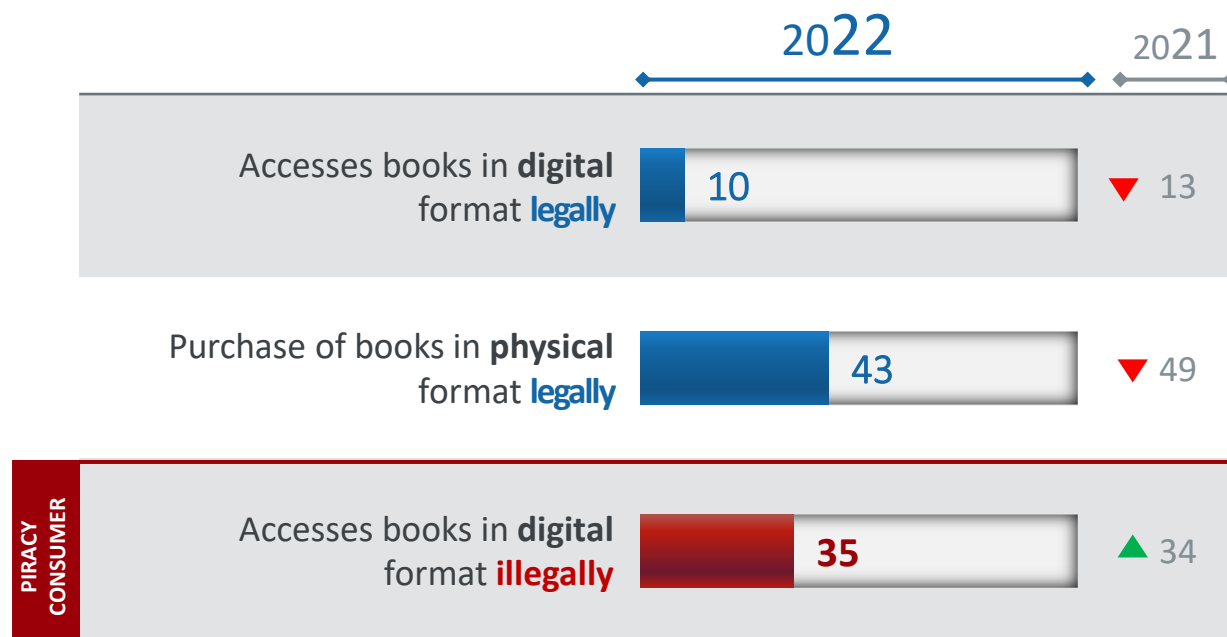


Consumption of illicitly consumed video games is decreasing, while legal consumption is slightly increasing.

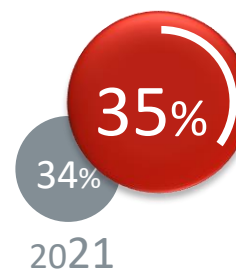
Unit: percentages // Base: Base: Total internet users: 2022 (n=3506); 2021: (n=3422)



# Books | Summary

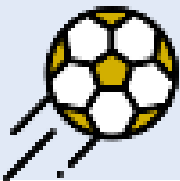


Piracy consumers in **digital** format



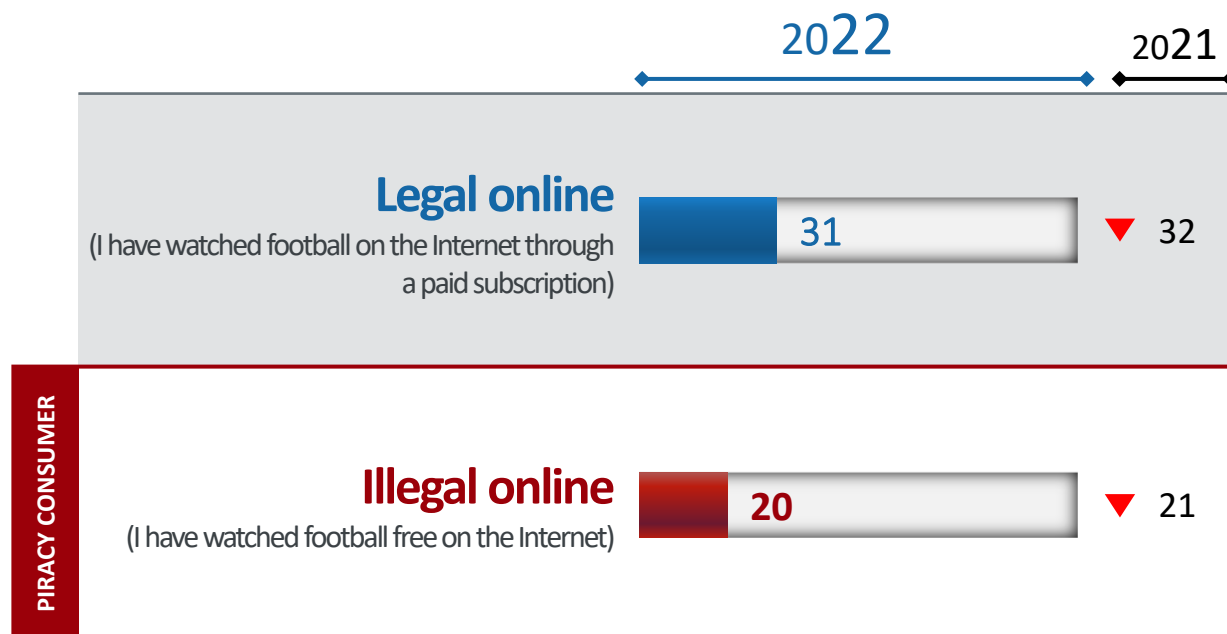
The number of consumers who have accessed books legally, both in digital and physical format, is decreasing. On the other hand, the number of users who have accessed digital books illegally is increasing.

Unit: percentages // Base: Base: Total internet users: 2022 (n=3506); 2021: (n=3422)

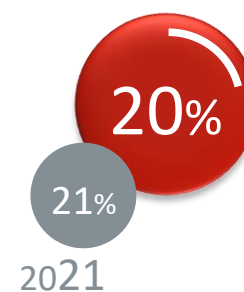


# Football | Summary

## BEFORE THE START OF THE WORLD CUP



Piracy consumers in **digital** format

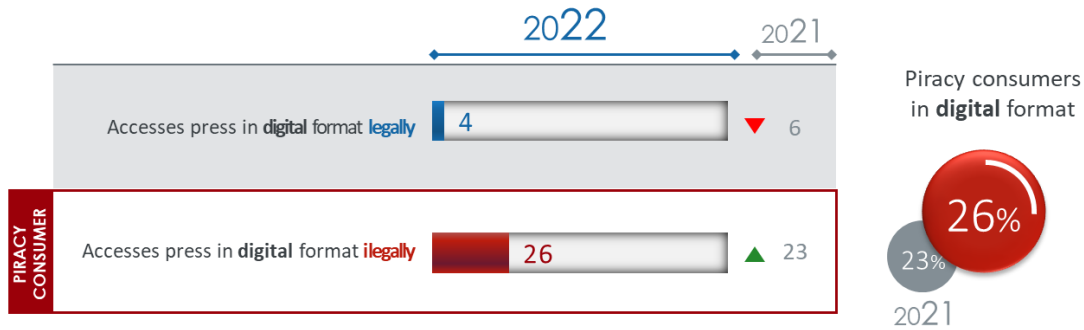


Despite the 17% increase in matches played, illicit use has decreased compared to 2021.



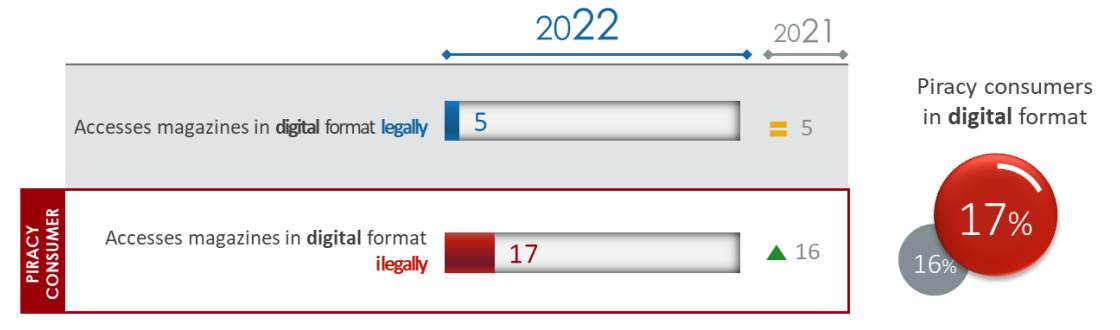
# Press and Magazines | Summary

## Press



Illicit consumption of digital press continues to grow, while legal consumption is declining.

## Magazines



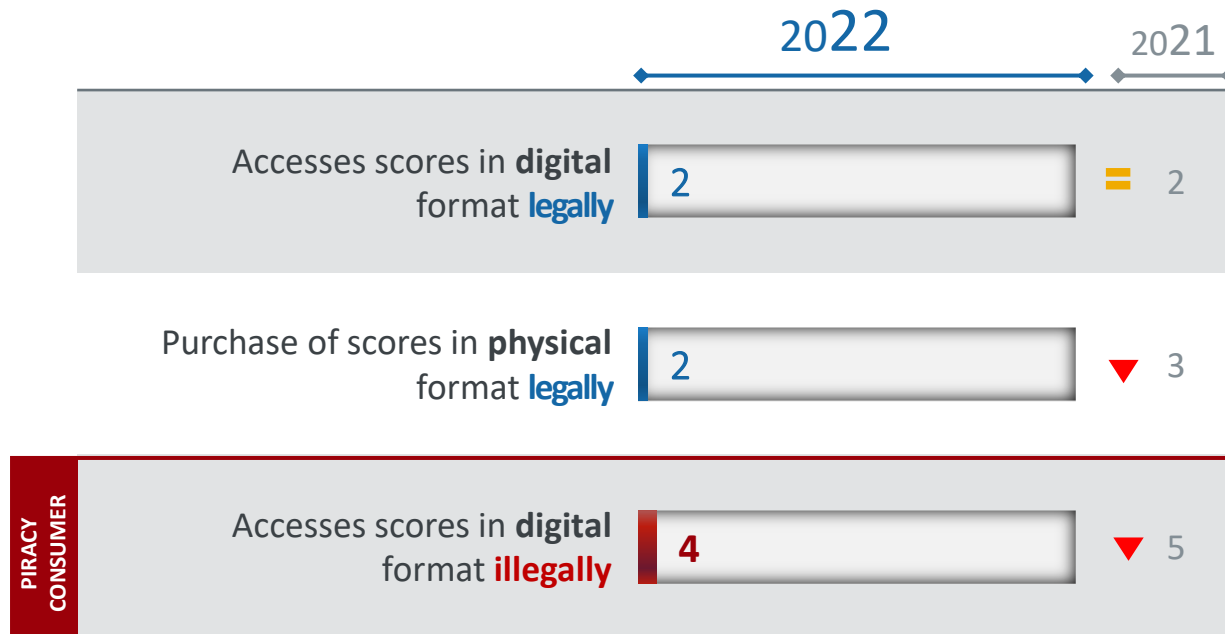
Illicit digital magazine consumption is three times higher than legal consumption and continues to increase this year.

Unit: percentages // Base: Total internet users: 2022 (n=3506); 2021: (n=3422)

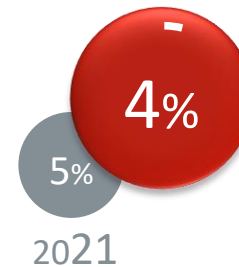




# Scores | Summary



Piracy consumers in **digital** format



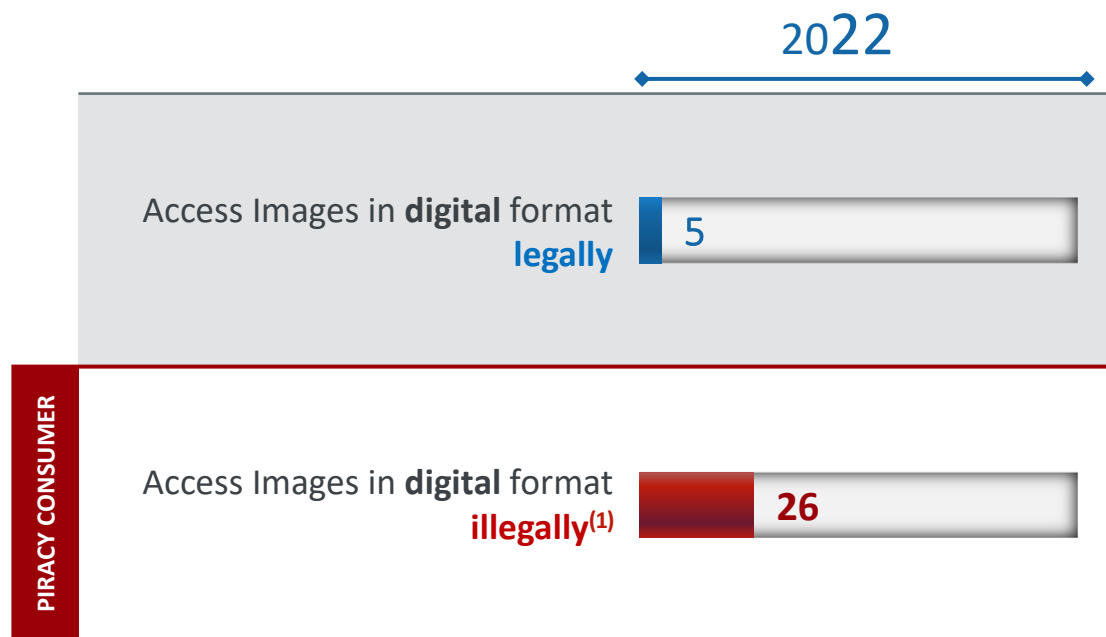
The number of internet users who have illicitly consumed scores is decreasing.

Unit: percentages // Base: Base: Total internet users: 2022 (n=3506); 2021: (n=3422)



# Images | Summary

(provisional estimate) <sup>(1)</sup>



Piracy consumers in digital format <sup>(1)</sup>



3 out of 10 internet users have downloaded images illegally. Only 5% do so legally.

<sup>(1)</sup> The consumption of illegal images is an estimate, as this is the first year they have been measured and they are not consolidated, so there may be variations in future measurements.



---

### 3. Piracy in Spain and lost profit for all industries

# Illegal digital access<sup>(1)</sup>

Illegally consumed content declines in virtually all industries, with the exception of Films and Series, which increases. The value of content increases slightly, due to the rising cost of content.



<sup>(1)</sup> Overall result does not include data on Images, as it is an estimated figure for the first year it has been measured and is not consolidated, and there may be variations in future measurements.

<sup>(2)</sup> The value of football piracy has been calculated on the basis of the number of households that pirate this content and the value of football subscriptions.

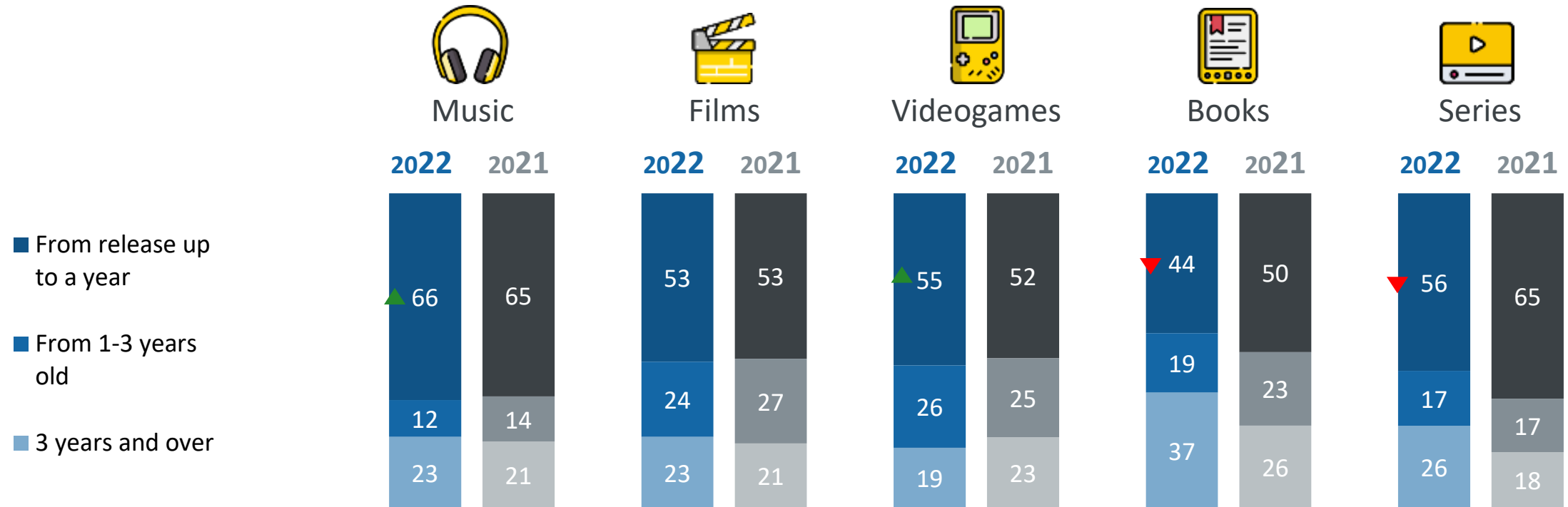
<sup>(3)</sup> Score data are qualitative due to insufficient sample size for their calculation.

▲ Superior respecto a 2021  
▼ Inferior respecto a 2021

Unit: percentages // Base: Base: Total internet users: 2022 (n=3506); 2021: (n=3422)

# Illicit access in terms of age of content

There is an increase in the consumption of new content in Music, Films and Videogames.  
On the other hand, a decrease in the consumption of new content was observed in Books and Series.

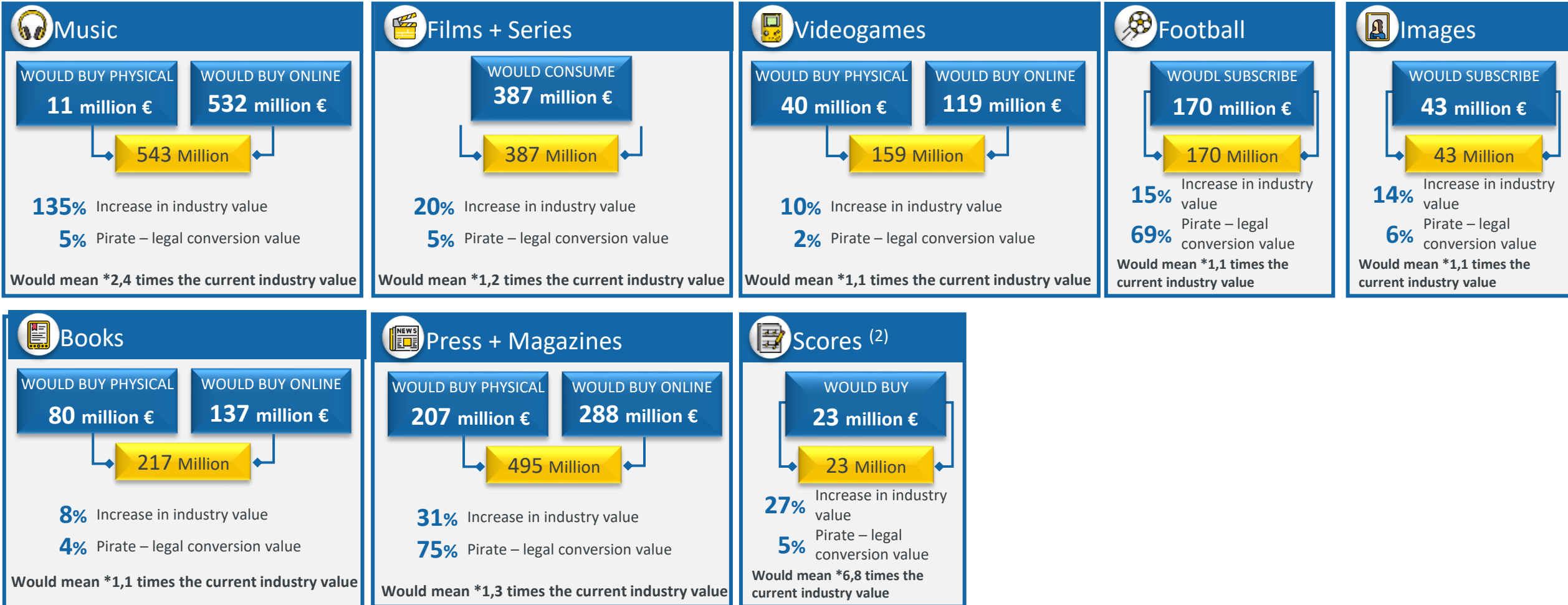


Unit: percentages // Base: Base: Total internet users: 2022 (n=3506); 2021: (n=3422)

▲ Higher than 2021  
▼ Lower than 2021

# Summary | Lost profit in industry in Spain due to the effect of piracy. <sup>(1)</sup>

The lost profit in 2022 for the industries was **1.995 million** euro












(1) Overall result does not include data on Images, as it is an estimated figure for the first year it has been measured and is not consolidated, and there may be variations in future measurements.

(2) Score data are qualitative due to insufficient sample size for their calculation.

Unit: percentages // Base: Base: Total internet users: 2022 (n=3506); 2021: (n=3422)

# Industry value + profit lost <sup>(1)</sup>

Profit lost has a slightly decreasing variation this year, with the exception of Books which remains the same. On the other hand, all industries are up compared to 2021, except Football, which is unchanged.

		Industry value	Profit lost	TOTAL		2022			Variation with 2021		
						Industry	Profit lost	TOTAL	Industry	Profit lost	TOTAL
MUSIC 	Physical	57	11	68	68	402	543	945	+10%	-17%	-7%
	Digital	345	532	877	877						
VIDEOGAMES 	Physical	397	40	437	437	1.577	159	1.736	+20%	-10%	+17%
	Digital	1.180	119	1.299	1.299						
BOOKS 	Physical	2.432	80	2.512	2.512	2.567	217	2.784	+6%	0%	+5%
	Digital	135	137	272	272						
FOOTBALL 	Physical + Digital	1.150	170	1.320	1.320	1.150	170	1.320	0%	-15%	-2%
FILMS + SERIES 	Physical + Digital	1.893	387	2.280	2.280	1.893	387	2.280	+30%	-7%	+22%
PRESS + MAGAZINES 	Physical	928	207	1.135	1.135	1.603	495	2.108	+4%	-13%	-1%
	Digital	685	288	973	973						
SCORES <sup>(2)</sup> 	Physical + Digital	4	23	27	27	4	23	27	+3%	-30%	-26%
IMAGES 	Digital	316	43	359	359	316	43	359	-	-	-

(1) Overall result does not include data on Images, as it is an estimated figure for the first year it has been measured and is not consolidated, and there may be variations in future measurements.

(2) Score data are qualitative due to insufficient sample size for their calculation.

Unit: percentages // Base: Base: Total internet users: 2022 (n=3506); 2021: (n=3422)



# 4.

Repercussion on public funds and employment



# Employment<sup>(1)</sup>

According to the data obtained from the market share that the industries are losing, almost 90,000 jobs could be generated, both directly and indirectly. The public treasury would receive 551 million euros, distributed between VAT on the content purchased, social security and income tax on the jobs generated.

Total value of the **PROFIT LOST** because of ilegal accesses

**1.995** Million euro

This represents an **Increase of 22%** over the anual billing of the industries

**DIRECT jobs** that would be generated in a scenario without illegal access.

**14.226** DIRECT Jobs.

It's estimated that **1 direct** job can generate **6 indirect** ones

In **total direct + indirect** jobs will be genrated

**85.358** total jobs

**Total los income in public funds**

**551** Million euro

370  
VAT

139  
Social Security

41  
IRPF









(1) Overall result does not include data on Images, as it is an estimated figure for the first year it has been measured and is not consolidated, and there may be variations in future measurements.

Unit: percentages // Base: Base: Total internet users: 2022 (n=3506); 2021: (n=3422)

# Direct jobs generated without illegal accesses 2022 <sup>(1)</sup>

The content industries that are members of the Coalition currently employ 103,025 direct workers in Spain. The new direct jobs generated in a scenario without illegal access would be 14,226 direct jobs.



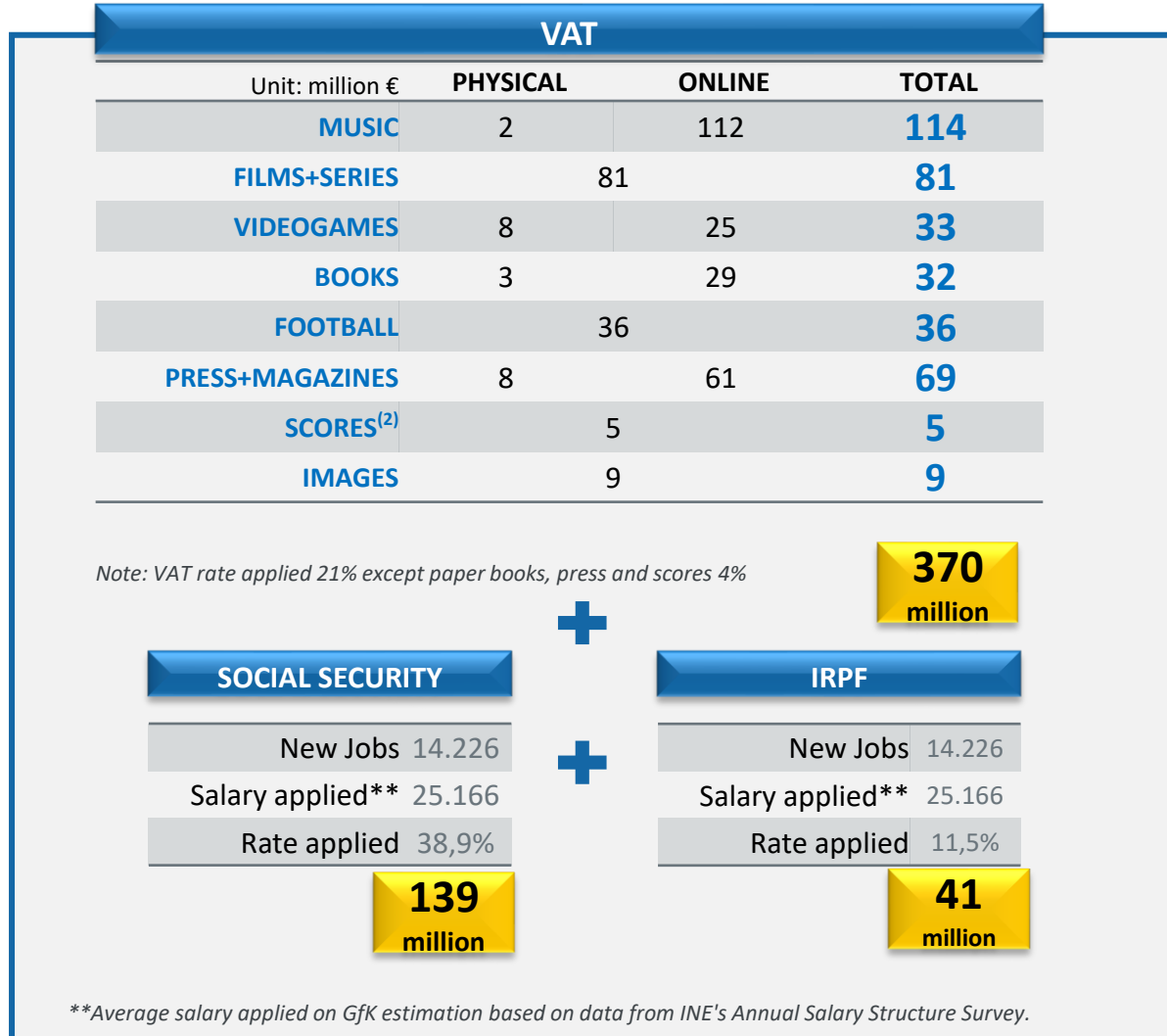
Content and area of work	CURRENT POSITIONS 2021	Estimated increase %	Estimated increase	TOTAL EMPLOYMENT
 <b>MUSIC</b>				
Production	6.545	21,1%	1.378	7.923
Distribution	1.800	45,5%	818	2.618
 <b>FILMS+SERIES</b>				
Total	39.000	21,3%	8.310	47.310
 <b>VIDEOGAMES</b>				
Total	9.500	5,9%	562	10.062
 <b>BOOKS</b>				
Editorial production	4.442	4,2%	188	4.630
Distribution	18.155	8,5%	1.535	19.690
 <b>FOOTBALL</b>				
Employment	12.007	7,9%	948	12.955
 <b>PRESS+MAGAZINES</b>				
Employment	11.558	4,20%	485	12.043
 <b>SCORES<sup>(2)</sup></b>				
Employment	18	7,5%	1	19
 <b>IMAGES</b>				
Employment	25.000	14,0%	3.402	28.402
<b>TOTAL</b>	<b>103.025</b>	<b>13,8%</b>	<b>14.226</b>	<b>117.251</b>

(1) Overall result does not include data on Images, as it is an estimated figure for the first year it has been measured and is not consolidated, and there may be variations in future measurements.

(2) Score data are qualitative due to insufficient sample size for their calculation.

# Public funds cease to receive because of illegal contents<sup>(1)</sup>

The public administration lose 551 million euros this year, due to the illicit consumption of content.

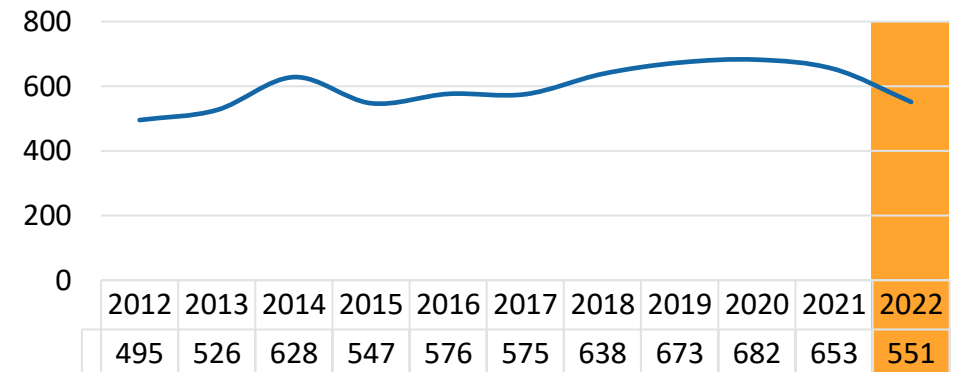


## Total lost income in public funds

**551** Million euros



**6.544** million euros  
in 11 years, lost in public funds

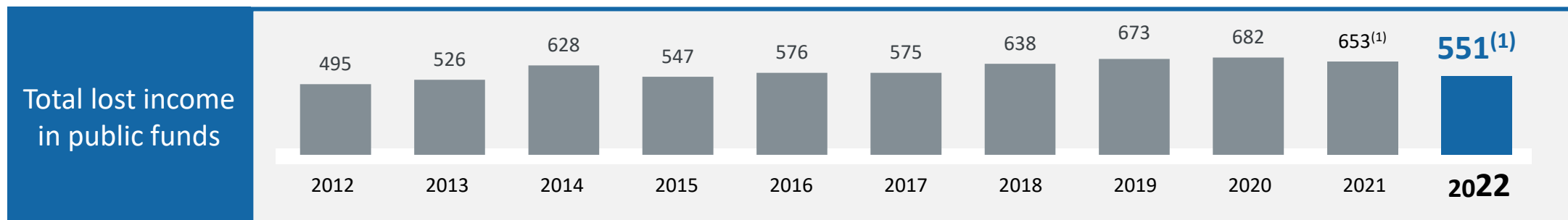
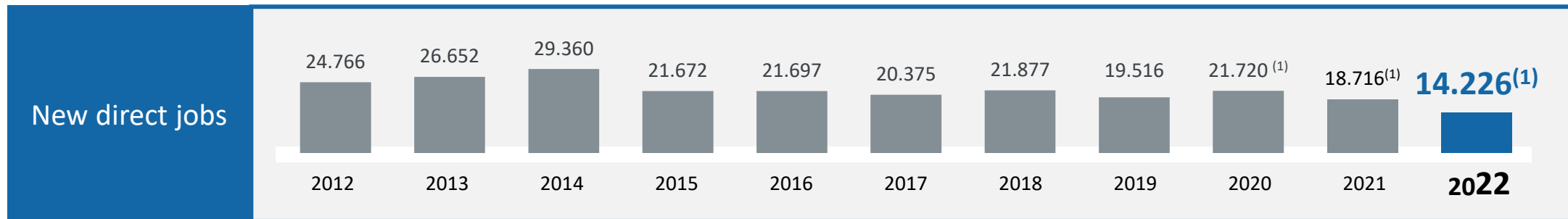
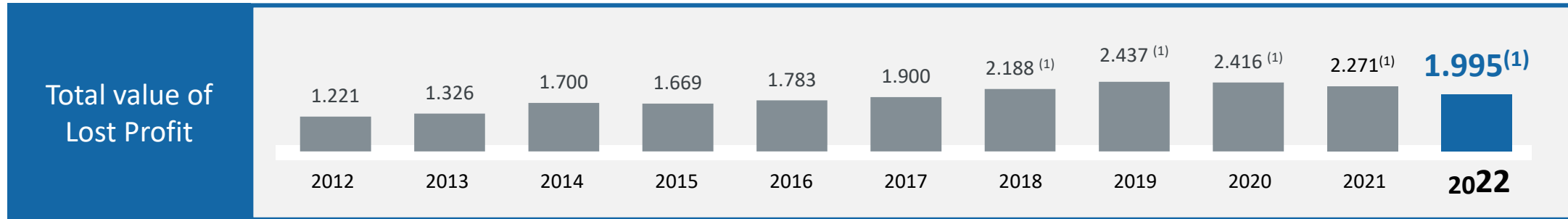


(1) Overall result does not include data on Images, as it is an estimated figure for the first year it has been measured and is not consolidated, and there may be variations in future measurements.

(2) Score data are qualitative due to insufficient sample size for their calculation.

# Piracy impact<sup>(2)</sup>

With respect to 2021, this year 2022 decreases the share of lost profits, and the number of direct jobs that would be generated in the absence of the consumption of illicit content, and the resulting tax and social security revenues for the Administration.



VAT – 370  
S. Security – 139  
IRPF – 41

(1) Overall result does not include data on Images, as it is an estimated figure for the first year it has been measured and is not consolidated, and there may be variations in future measurements.

(2) Score data are qualitative due to insufficient sample size for their calculation.

# OBSERVATORIO 2022



DE PIRATERÍA Y HÁBITOS DE CONSUMO  
DE CONTENIDOS DIGITALES



## Contacto

Calle José Abascal, 44, 4ª planta - 28003 Madrid  
Teléfono (+34) 91 282 53 41 - Fax (+34) 91 442 48 49  
Mail: [lacoalicion@lacoalicion.es](mailto:lacoalicion@lacoalicion.es)



**lacoalición**  
de creadores e industrias de contenidos