



PIRACY OBSERVATORY 2023 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.

TYPE OF INTERVIEW



Online survey, with semi-structured questionnaire, approximate duration of 18 minutes.

AREA



National.

SAMPLING METHOD



Stratified random sampling by conglomerates

TOTAL SAMPLE



3.258 interviews

QUALITY CONTROL



Abiding by ISO 9001:2015 standards

SAMPLE ERROR



Total at national level $n = 3.258$ = $\pm 1,72\%$, for a level of confidence of 95%, being $p=q=0,50$

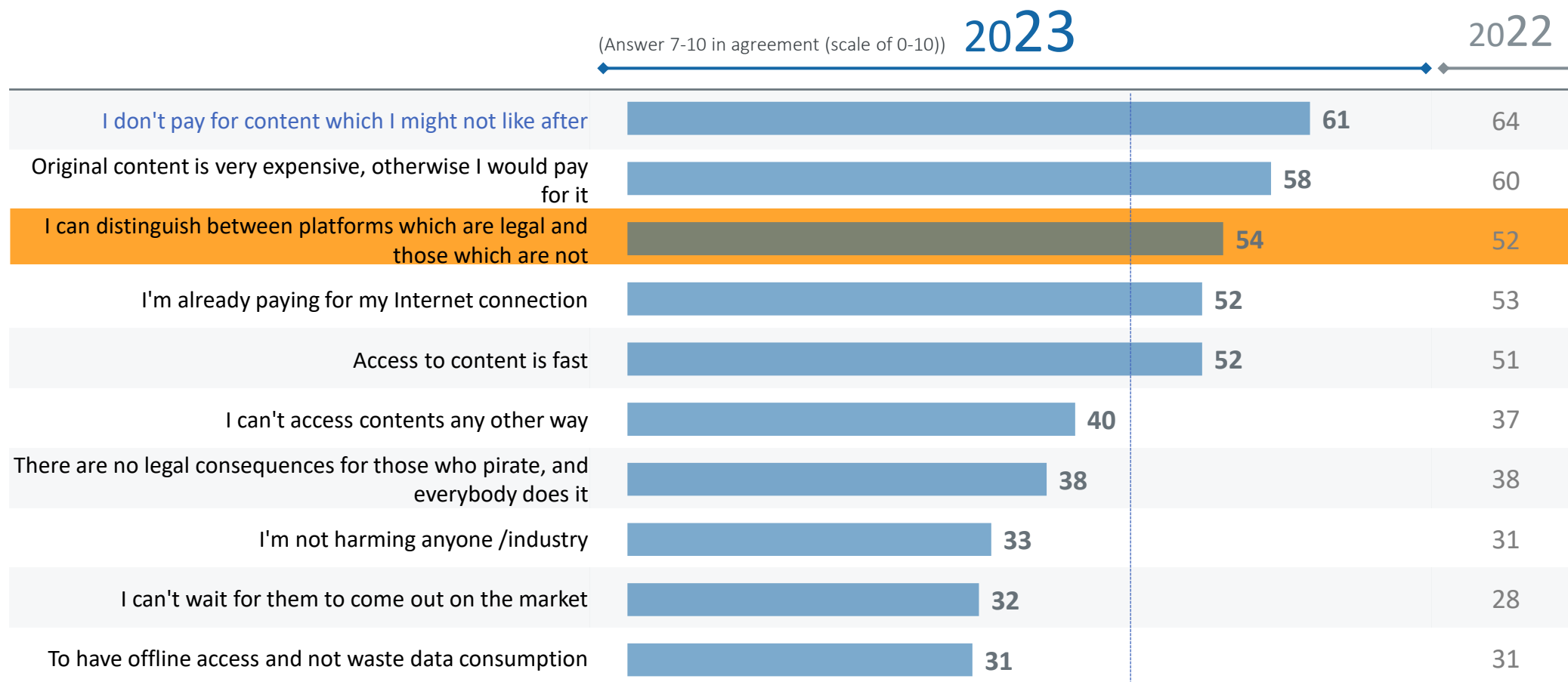
FIELDWORK



Last quarter 2023

Reasons for piracy (*)

The main reasons are: thinking that they will probably not like the content. 46% of consumers of illicit content claim **NOT** to know how to distinguish between legal and illegal platforms. The motivation of the desire to access novelties and the belief that they are not harming anyone by doing so is increasing, while the justification “because everyone does it and nothing happens” is maintained (4 out of 10 Internet users).



(*) WITHOUT IMAGES NOR SCORES

Unit: percentages // Base: Consumers of free digital content 2023 (n=1129); 2022 (n=893)

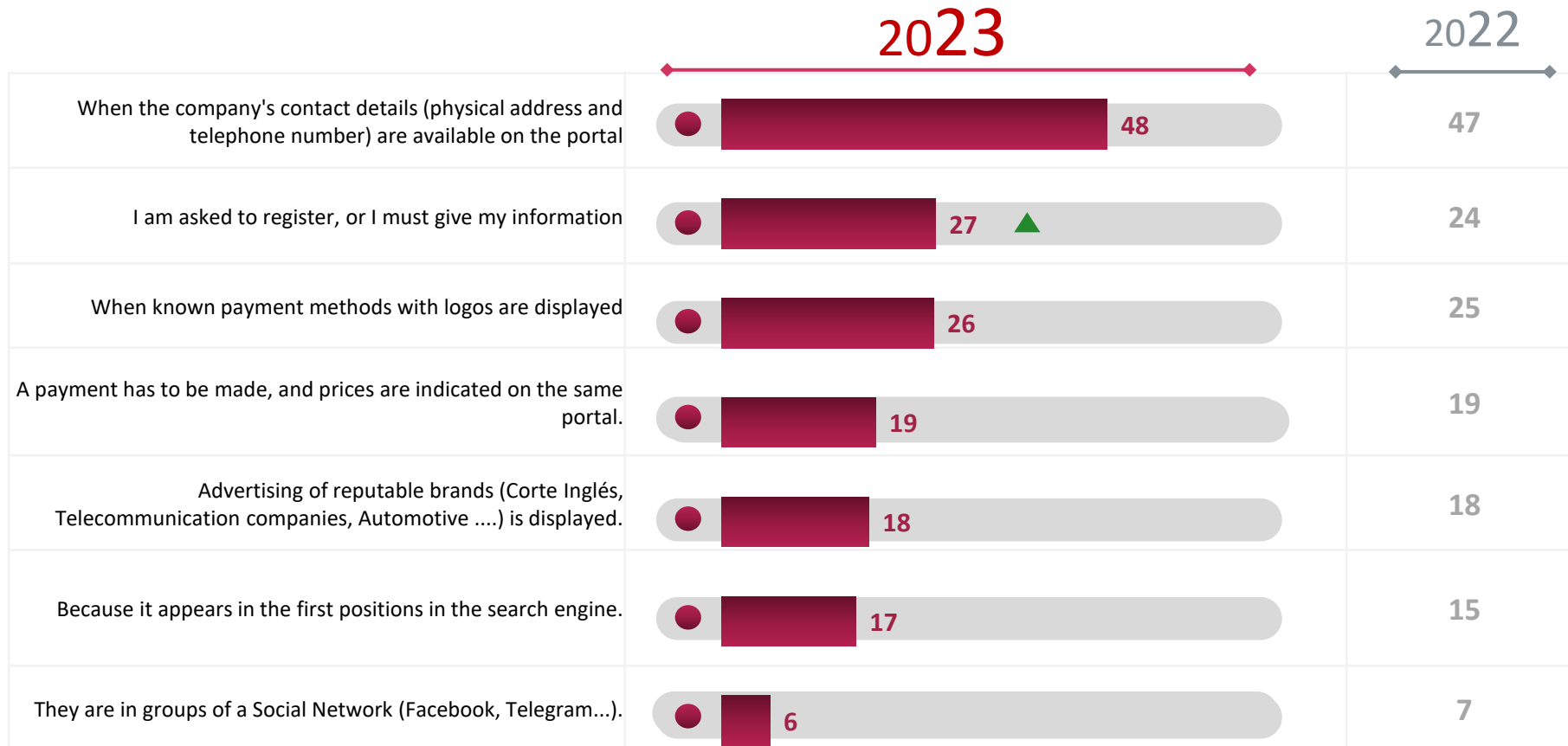
▲ Significantly higher difference than 2022
▼ Significantly lower difference than 2022

Identifying an illegal portal or platform

Almost half of the individuals identify the legality of a portal if the company's contact details are available. 27% consider legal those who are asked to register or have had to give their data. 26% consider a portal legal if they show known payment methods with logos, 18% if they show advertising of top brands or appear in the first positions of the search engine.



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

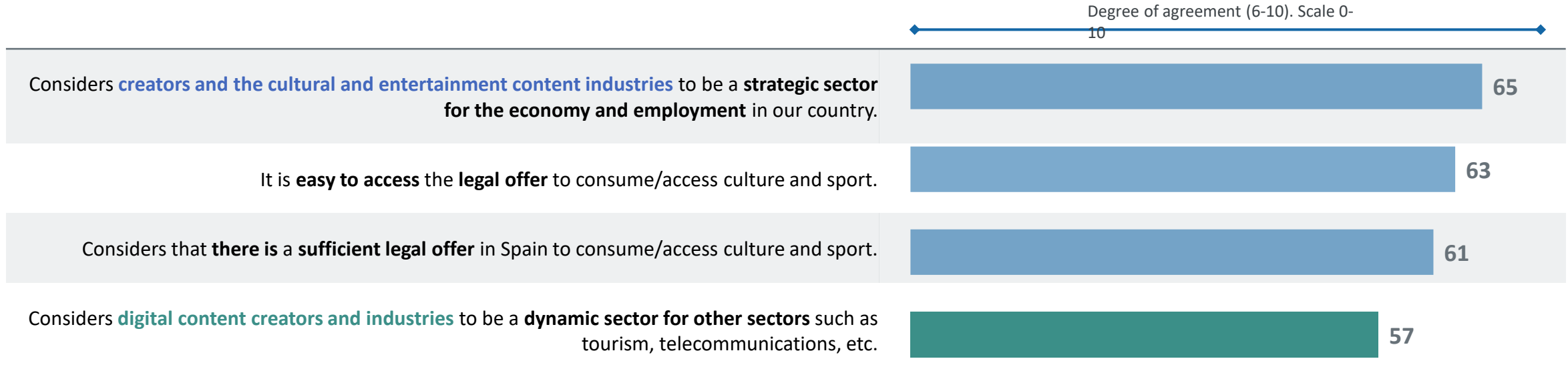


Unit: percentages // Base: Consumers of free digital content 2023: (n=3258); 2022: (n=3506)

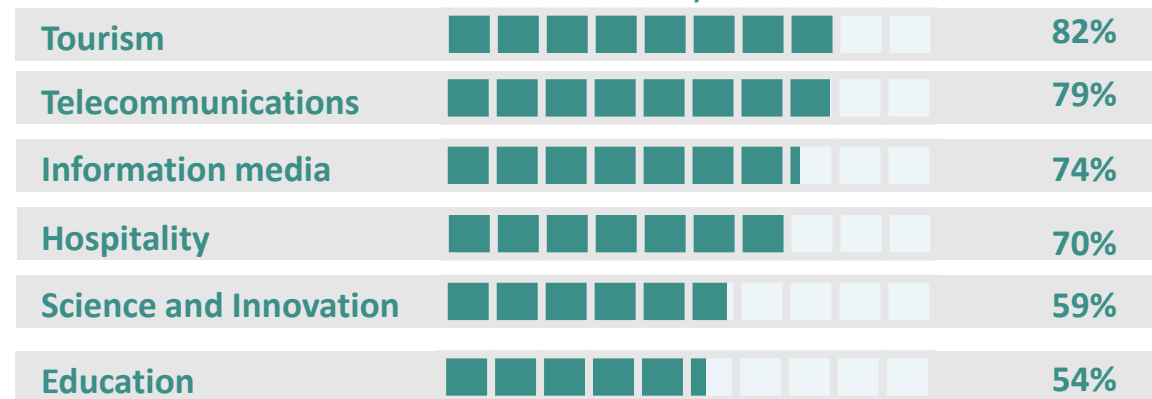
▲ Significantly higher difference than 2022
▼ Significantly lower difference than 2022

Perceptions of creators and the cultural and entertainment industries

65% of consumers of illicit 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. Tourism and Telecommunications are the industries that benefit the most. More than 60% consider that in Spain there is sufficient offer and easy access to it.



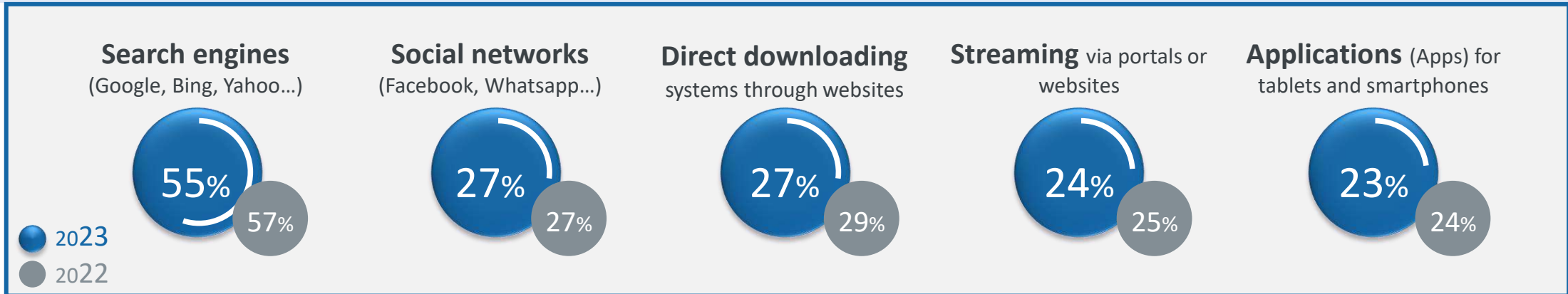
Which sectors do you see as empowering digital content creators and industries? (A LOT + ENOUGH)



Unit: percentages // Base: Consumers of free digital content 2023 (n=1229)

How do they access illicit contents?

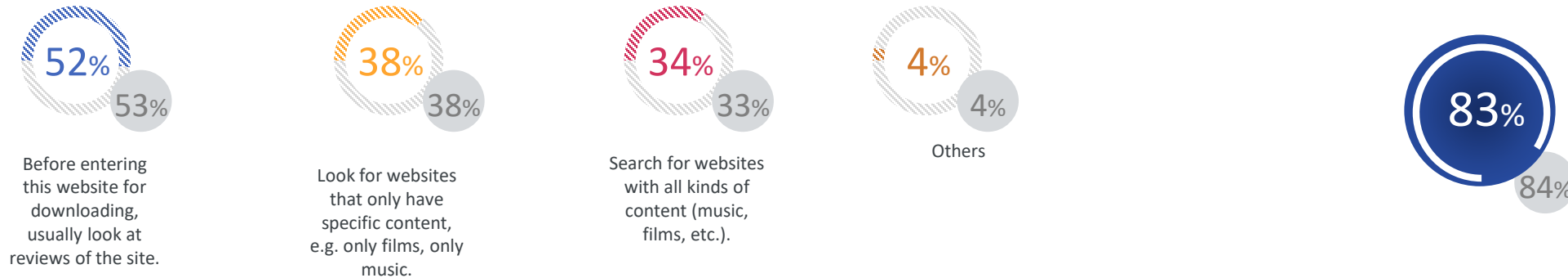
The main access is through search engines (Google), followed by social networks and direct download. When they access the Web of free content from search engines, half of them look for reviews. Most of them usually choose one of the top twenty options.



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.



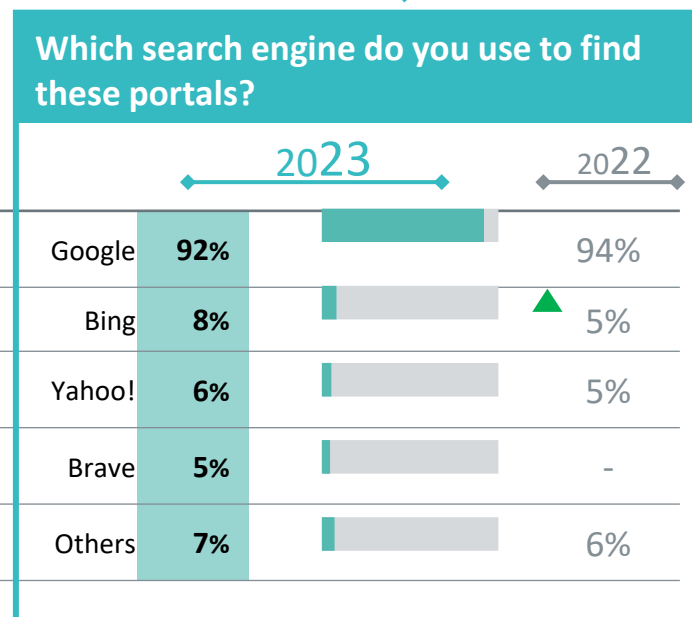
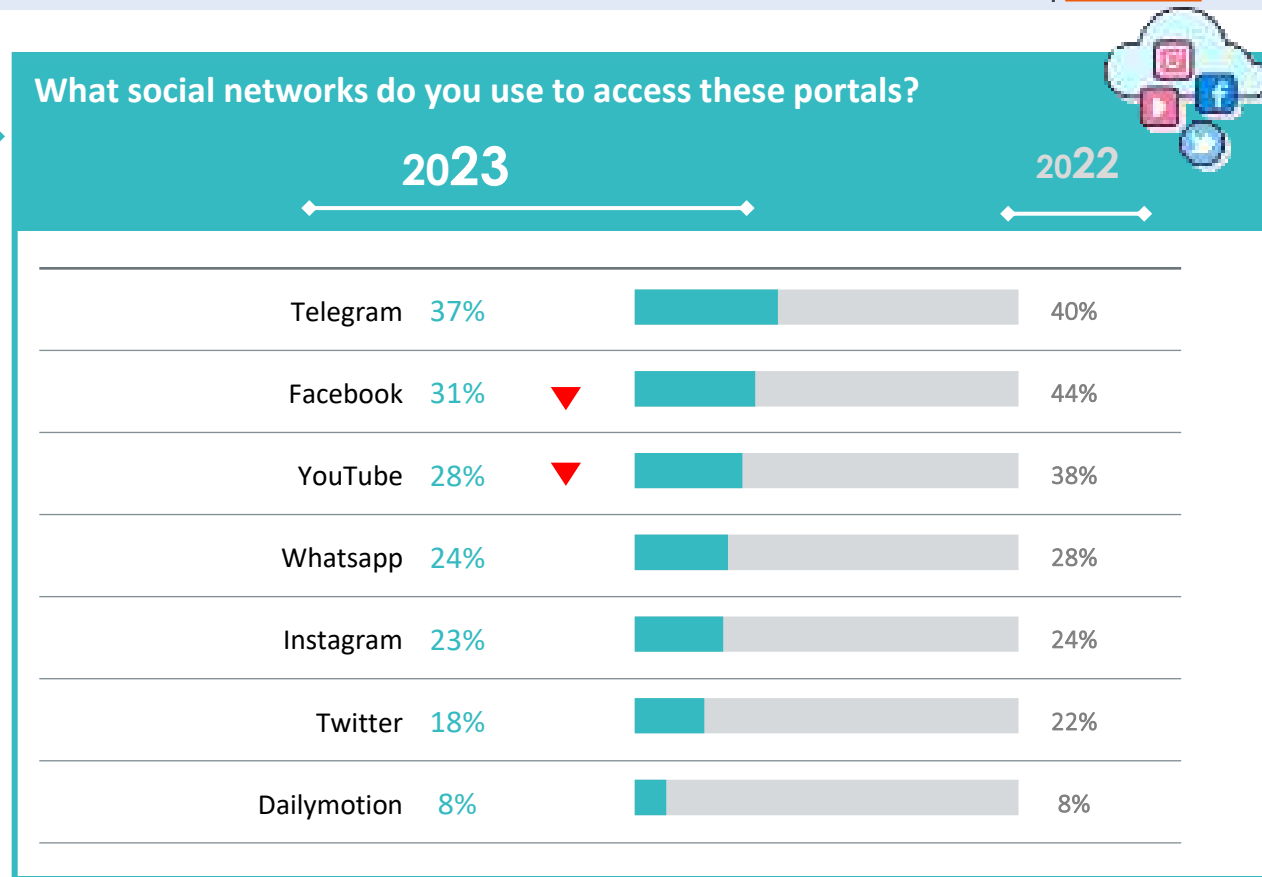
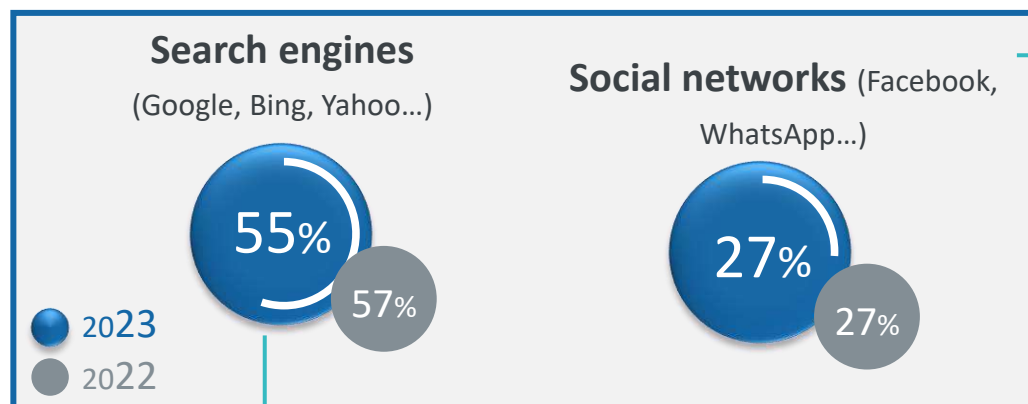
(*) WITHOUT IMAGES NOR SCORES

Unit: percentages // Base: Consumers of free digital content 2023 (n=1105); 2022 (n=1261)

▲ Significantly higher difference than 2022
▼ Significantly lower difference than 2022

How do they access illicit contents?

Google is the most used by the vast majority to access illicit content (92%), although Bing increases its share. Among those who access from social networks, Telegram ranks first as the app through which illicit content is accessed, followed by Facebook, YouTube and WhatsApp.



(*) WITHOUT IMAGES NOR SCORES

Unit: percentages // Base: Consumers of free digital content 2023 (n=1105); 2022 (n=1261)

▲ Significantly higher difference than 2022
▼ Significantly lower difference than 2022

How illicit portals are financed | Obtainment of personal data

65% of free content consumers state that they need to register on the portals to access the content, half state that they provided their email address, and 2 out of 10 have had to provide their telephone number or answer a questionnaire. 7 out of 10 distrust providing this information.



65% had to register in a portal

66% se had to register in 2022

What details did they have to provide?



E-mail

2023 2022



Opinion questionnaire(*)

2023 2022

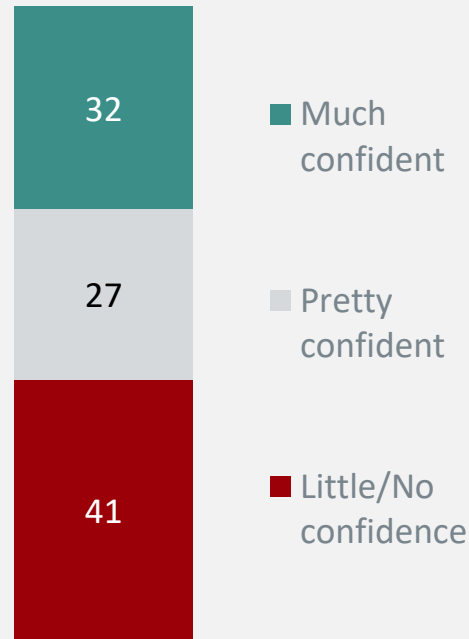


Telephone

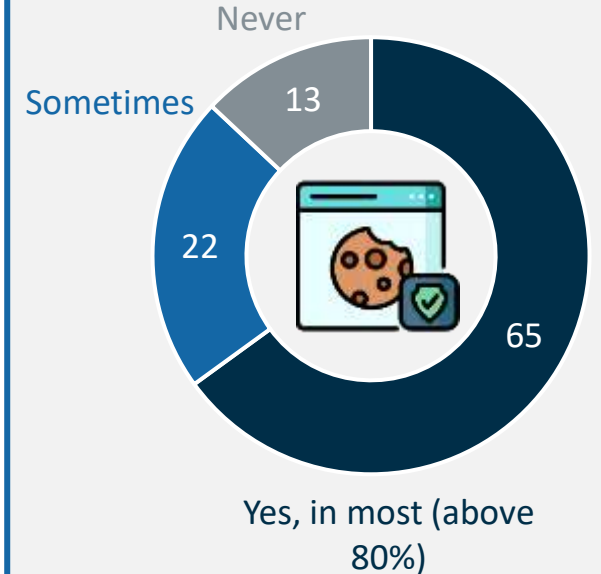
2023 2022



What degree of confidence gives you to provide this information?



Do you remember being asked accept cookies when you acceded to these contents?



(*) WITHOUT IMAGES NOR SCORES

Unit: percentages // Base: Free digital content consumers 2023 (n=1105); 2022 (n=1261)

▲ Significantly higher difference than 2022
▼ Significantly lower difference than 2022

(*) Opinion and consumer attitudes questionnaire

How illicit portals are financed | Advertising

9 out of 10 consumers of illicit content have accessed portals with advertising. This is not only advertising for gambling or dating sites, but 3 out of 10 say that they have seen advertising on these portals for premium brands. 58% of consumers still consider this advertising to be annoying, 14% harmful or embarrassing, and 10% that it is not suitable for minors. And 7 out of 10 consider that since using these portals, they receive more spam and advertising.

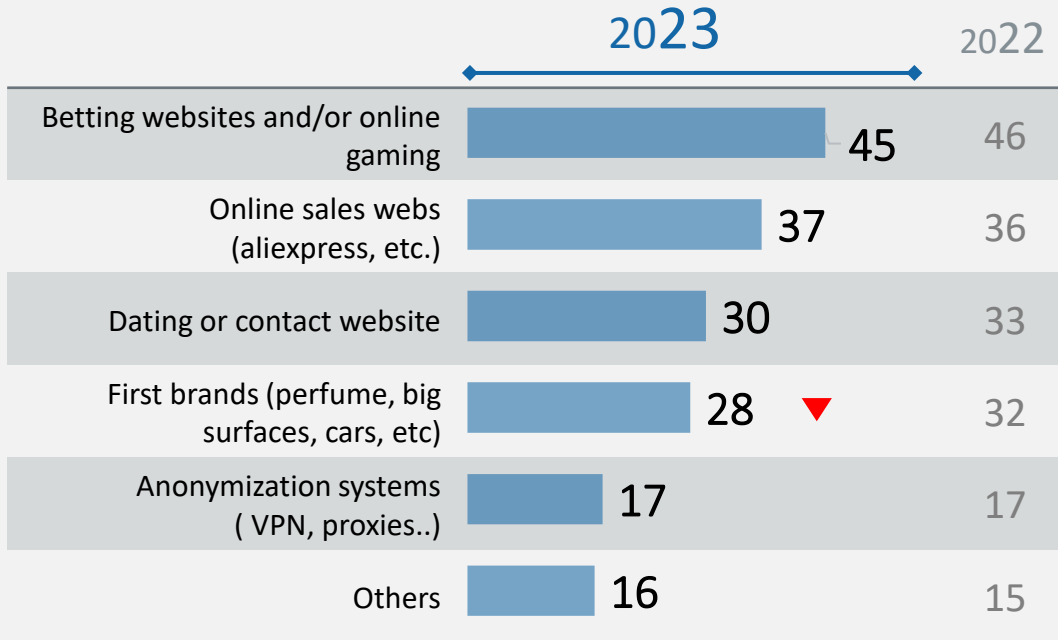


89% have accessed portals with advertising

Base: Access to illicit contents

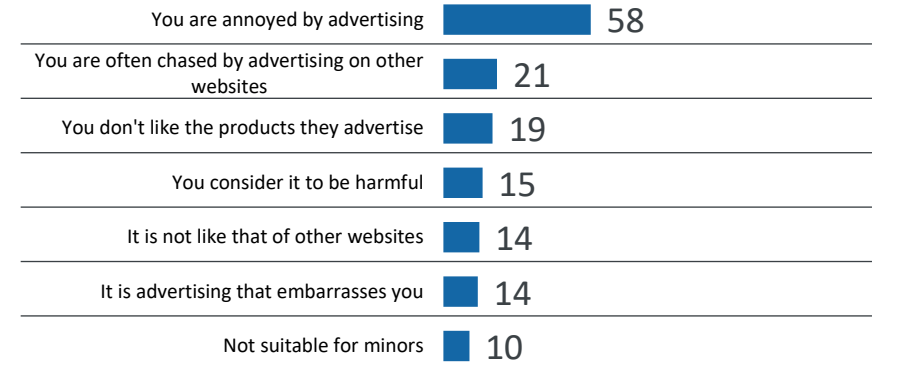
91% have accessed portals with advertising 2022

Advertising they recall



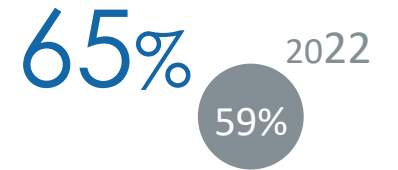
Advertising perception

2023



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



(*) WITHOUT IMAGES NOR SCORES

Unit: percentages // Base: Free digital content consumers 2023 (n=1105); 2022 (n=1261)

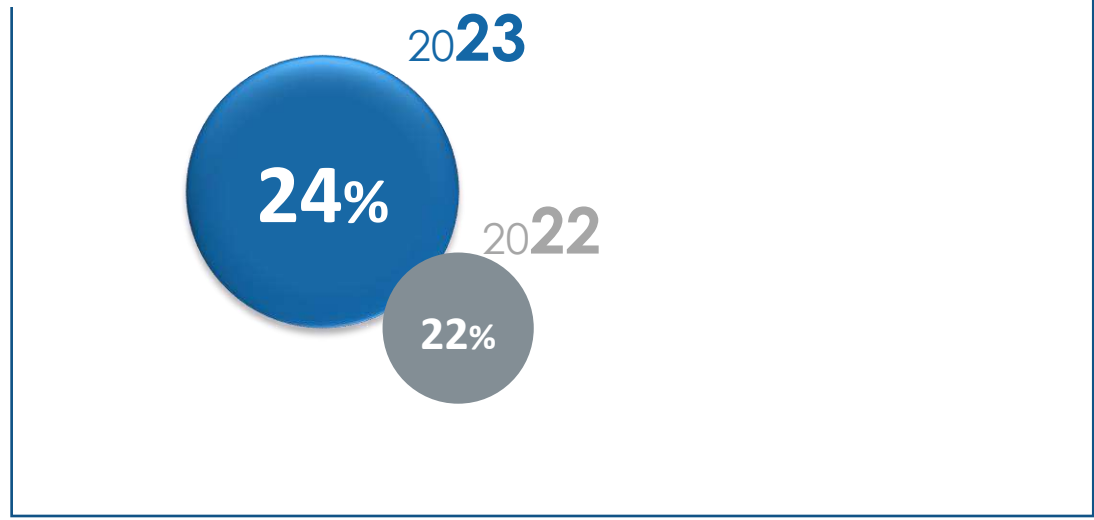
▲ Significantly higher difference than 2022
▼ Significantly lower difference than 2022

How illicit portals are financed | Payment methods

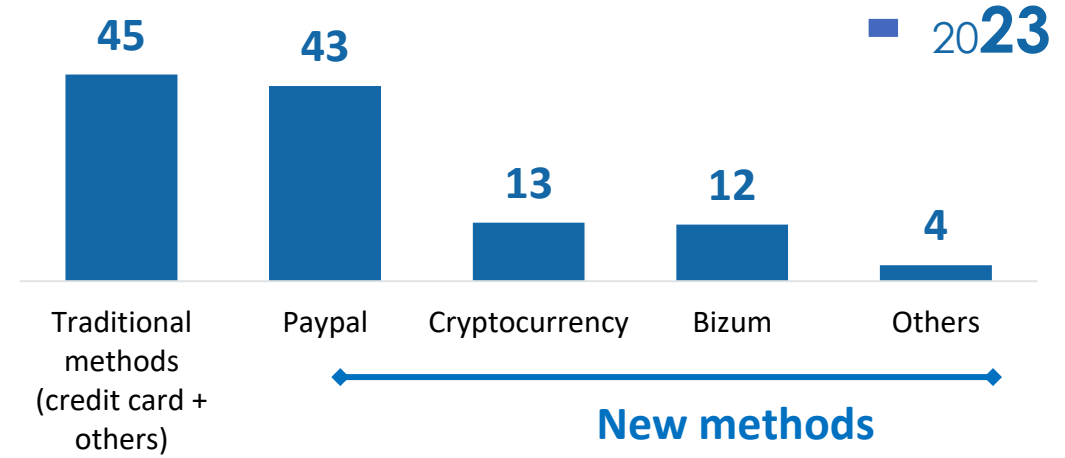
24% of Internet users who have accessed illicit portals have paid for the consumption of some content. The main payment methods are credit card and PayPal. Half of the consumers who pay with cryptocurrencies on these portals, it is because of the insecurity of using other types of payment methods.



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



Payment method



Use cryptocurrency as a payment method

Gives more security to pay with cryptocurrencies on such portals

50%

(*) WITHOUT IMAGES NOR SCORES

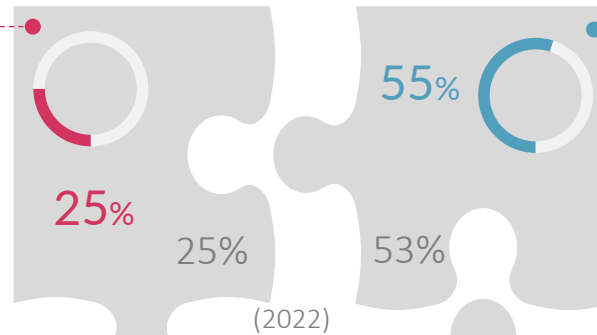
Unit: percentages // Base: Free digital content consumers 2023 (n=1105); 2022 (n=1261)

▲ Significantly higher difference than 2022
▼ Significantly lower difference than 2022

Have you had to answer any question or survey when accessing any content?



4 out of 10 consumers who register or log on to an illegal content site have had to complete a survey.



Do you remember seeing contact information?

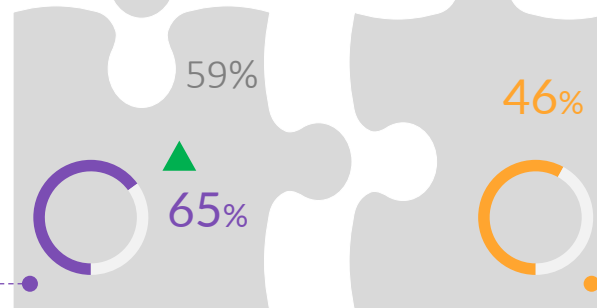
Only 55% recall having seen the contact details of the page they were accessing to consume illicit content.



Do you receive more spam and advertising?



65% of consumers who use these platforms report receiving more advertising and spam than before using them.



Have you been offered to install or purchase a VPN for downloading content?

Half of the consumers of these portals have been offered to install or buy a VPN to download content.



(*) WITHOUT IMAGES NOR SCORES

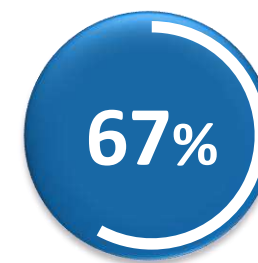
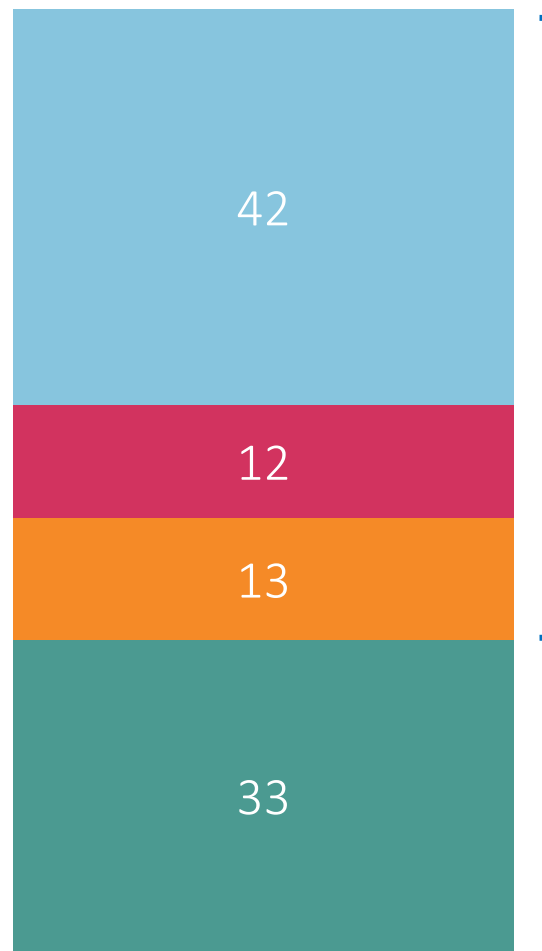
Unit: percentages // Base: Free digital content consumers 2023 (n=1105); 2022 (n=1261)

▲ Significantly higher difference than 2022
▼ Significantly lower difference than 2022

Incidents when downloading ILLEGAL content

67% of the users who had an incident could not solve it, mainly because they could not find a way to solve it.

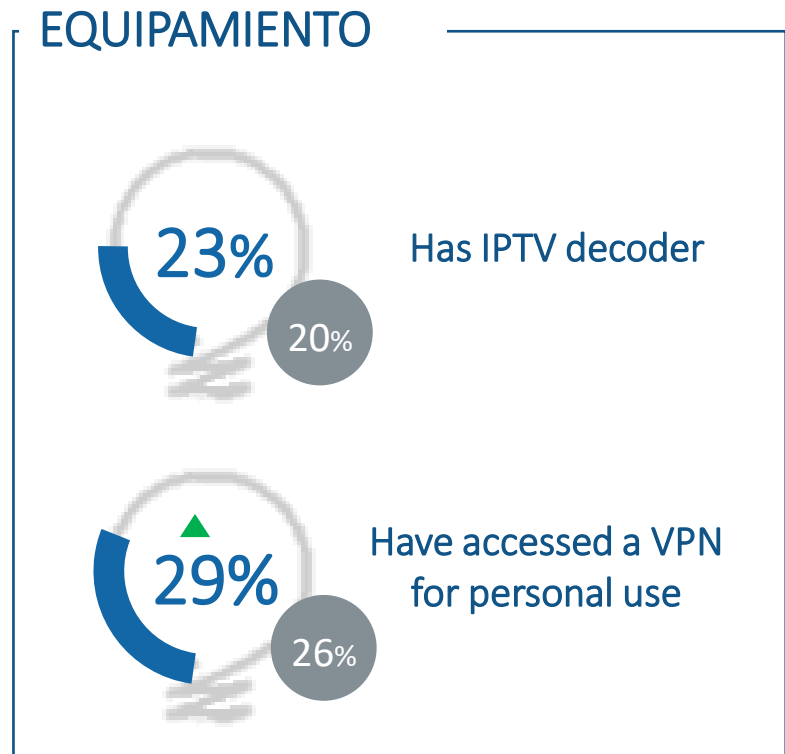
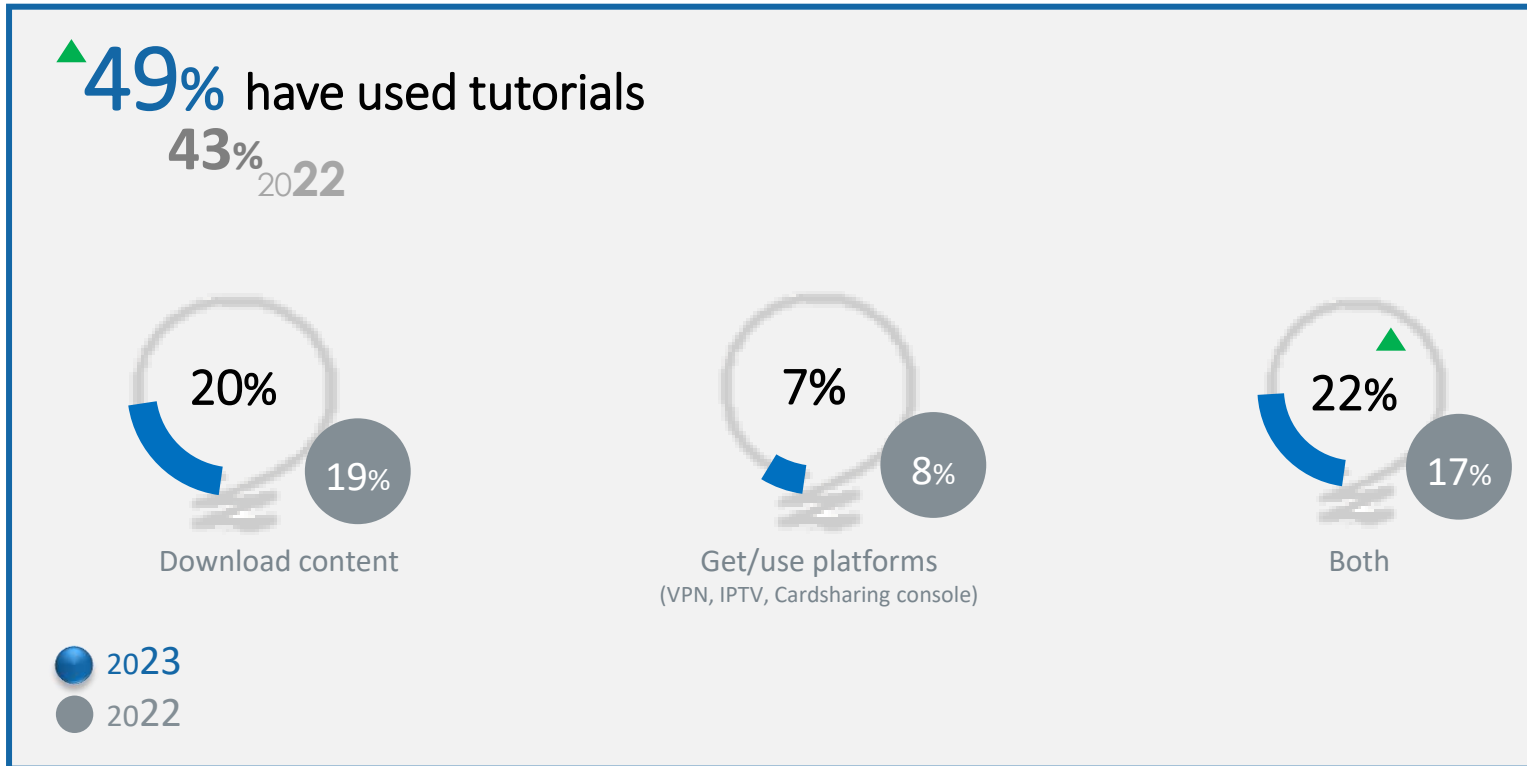
- I have not been able to, I have not found how to do it
- The form did not work
- I have contacted but have not heard back
- It was simple and they sorted it out



67% of the users of illegal content who had an incident have **not been able to solve it**, mainly because they could not find the way to do it in the site from where they accessed it, because the form they had available did **not really work** and those who actually filled it in have **not been answered**.

Tutorials to learn how to download content (*)

The use of tutorials is up significantly from last year. 49% of Internet users have used tutorials, mainly to consume content such as music or movies/series. 2 out of 10 have an IPTV decoder.



(*) WITHOUT IMAGES NOR SCORES

Unit: percentages // Base: Free digital content consumers 2023 (n=2234); 2022 (n=1809)

▲ Significantly higher difference than 2022
▼ Significantly lower difference than 2022

Closed content portals

There is a slight increase in the number of users of illicit content who have tried to access a content portal and it was closed. Torrent-type portals are where the largest number of users encounter closed portals and Telegram-type messaging groups. Two out of ten users are explained the reasons for the closures and 13% are directed to another site, mainly to other portals of the same type.

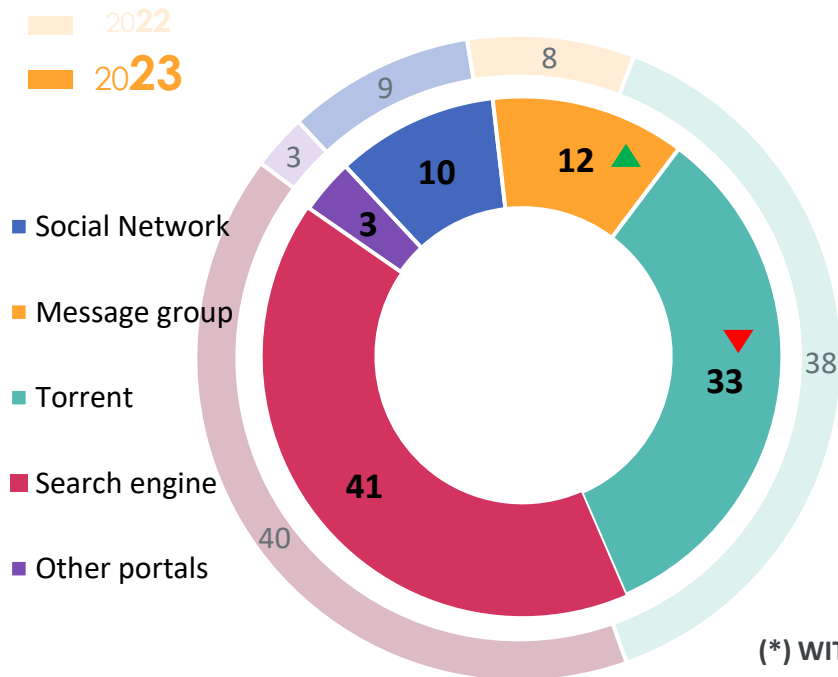
CLOSED CONTENT PORTALS

60% have tried to access a content portal that turned out to be closed / did not exist.

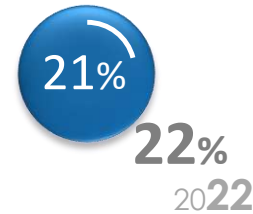
58%₂₀₂₂

Unit: percentages // Base: Free digital content consumers 2023 (n=2194); 2022 (n= 1778)

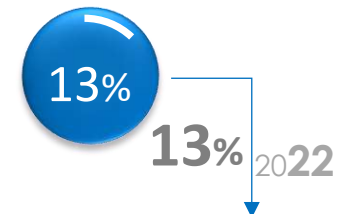
Where in particular were you looking for content, when you were unable to access?



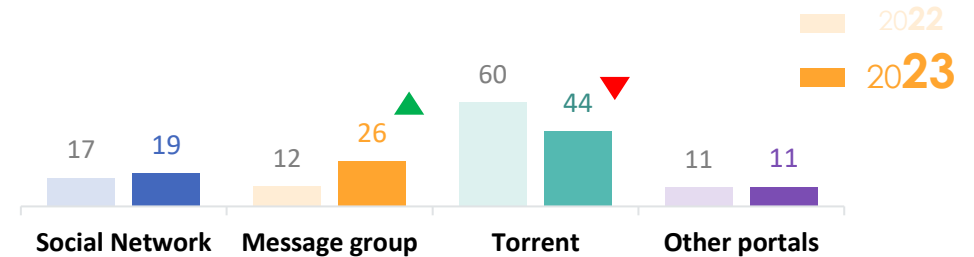
The reasons for the closure was explained



Was directed to another site



Where were you redirected?



(*) WITHOUT IMAGES NOR SCORES

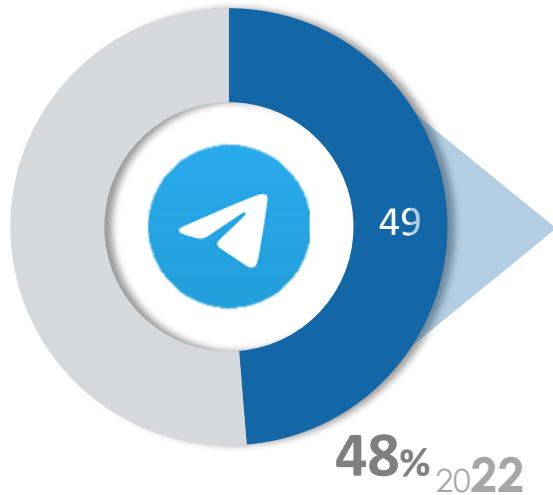
Unit: percentages // Base: Attempted to gain access to a closed portal 2023 (n=1313); 2022 (n= 1032)

▲ Significantly higher difference than 2022
▼ Significantly lower difference than 2022

Focus on: Use of Telegram / WhatsApp

Half of the Internet users use Telegram and 40% of them belong to a group where they have access to content. All Internet users use WhatsApp and 10% belong to a group where they have access to content.

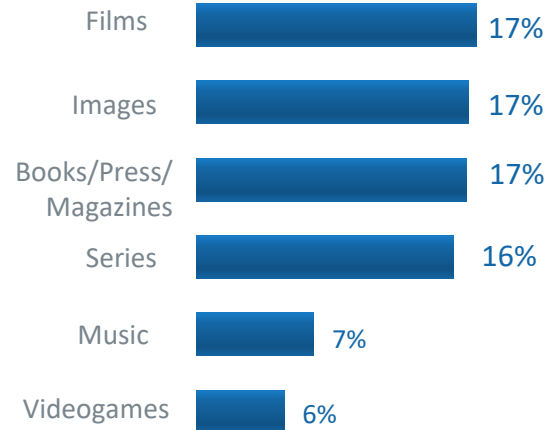
USE TELEGRAM



54% of consumers of illicit content use Telegram.

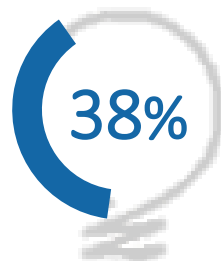
BELONGS TO A TELEGRAM GROUP WITH ACCESS TO CONTENTS

40% of Telegram users belong to some group with access to content (50% of consumers of illicit content).



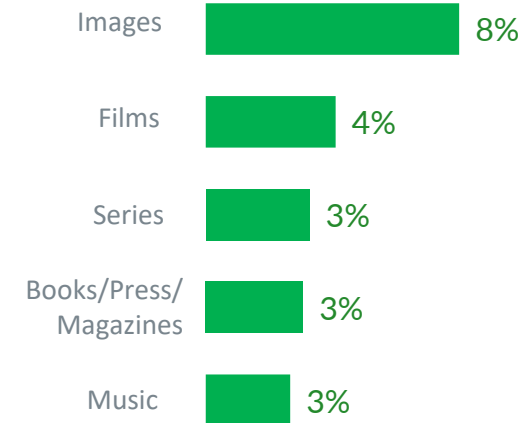
INFORMATION IS PROVIDED THROUGH TELEGRAM GROUPS

38% of Telegram group members find out through the groups about new domains or portals to go to when others are shut down.

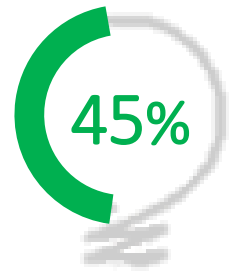


BELONGS TO A WHATSAPP GROUP WITH ACCESS TO CONTENTS

10% of Internet users belong to a group with access to content (13% of consumers of illicit content).



INFORMATION IS PROVIDED THROUGH WHATSAPP GROUPS



45% of WhatsApp group members find out through the groups about new domains or portals to go to when others are closed.

▲ Significantly higher difference than 2022
▼ Significantly lower difference than 2022

Motivations for illicit accesses

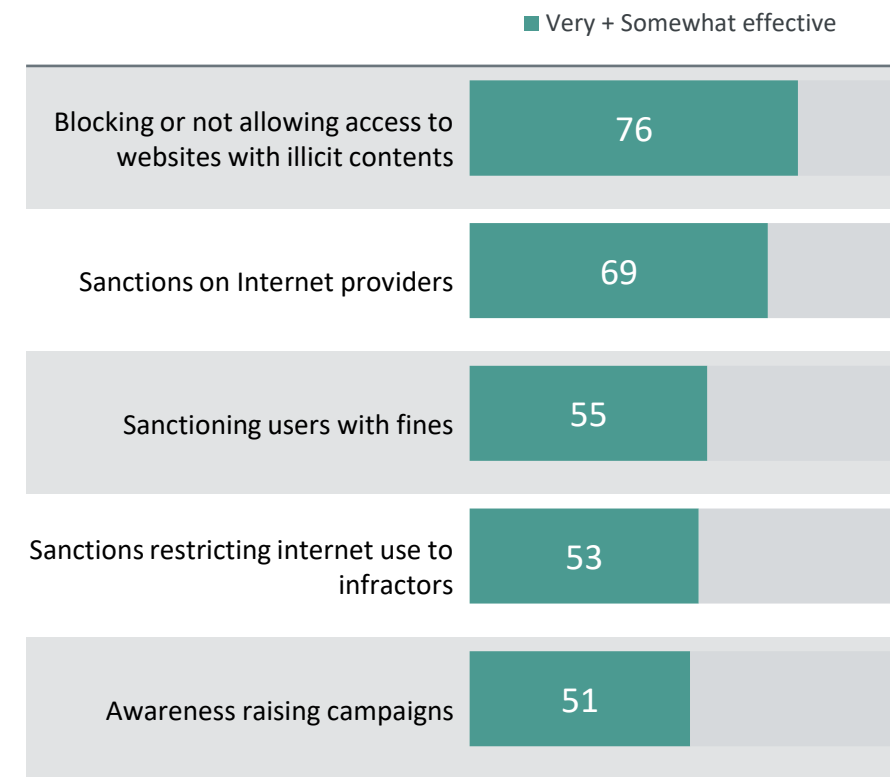
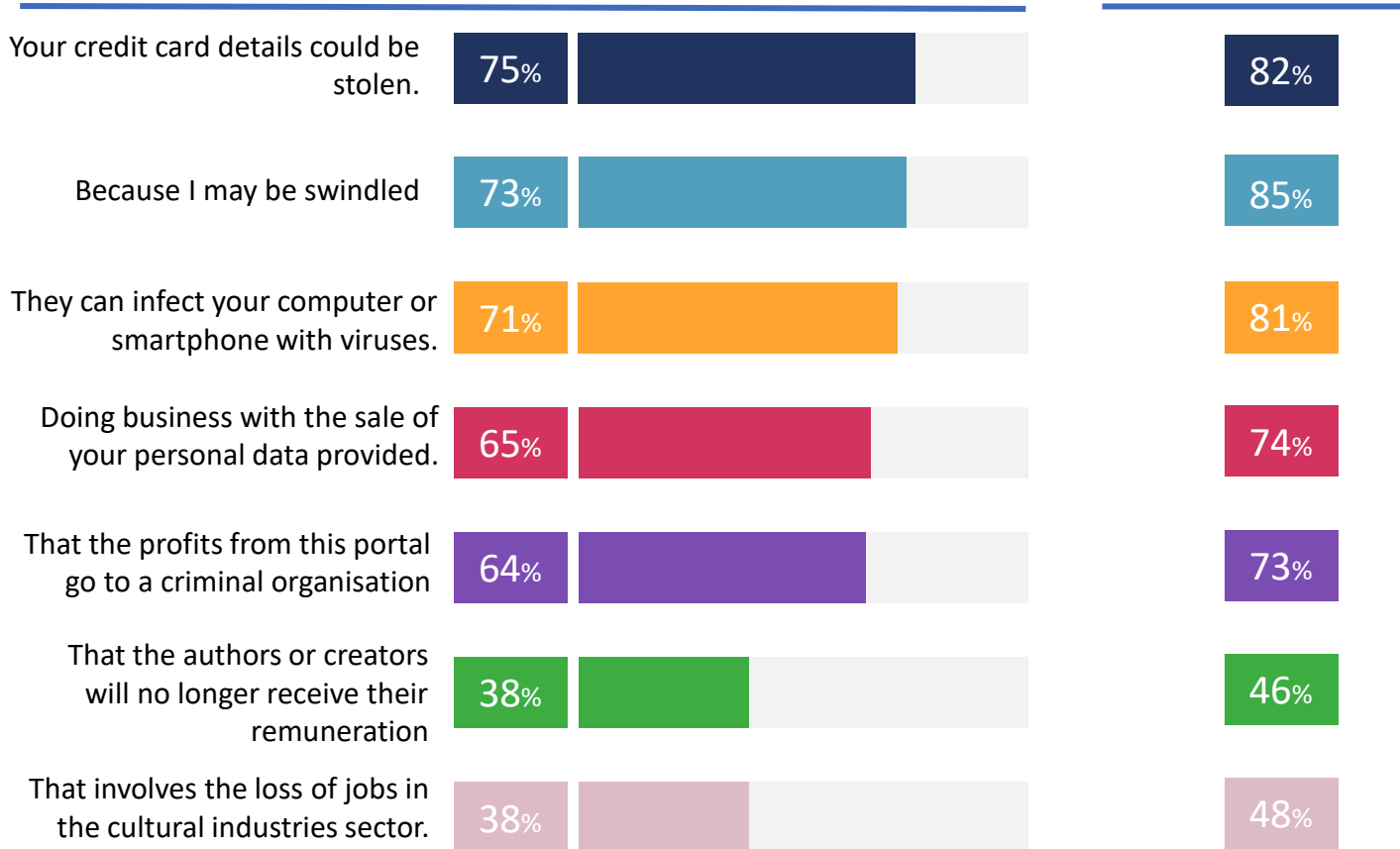
The main factor that would motivate people to stop consuming free digital content would be potential fraud: whether it is the theft of credit card data or being the victim of a scam, these are the same reasons stated by illicit non-consumers. The closing/blocking of a website remains the most effective measure.



For what reasons would you stop using illegal content?

Why don't you consume illicit content?

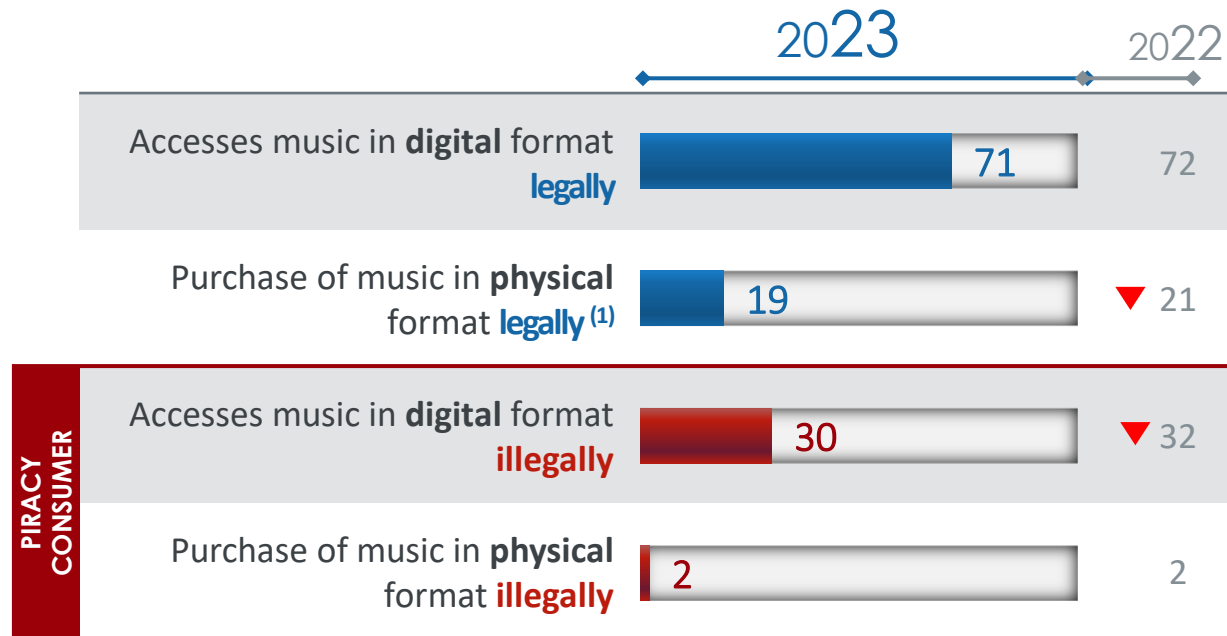
What measures would be most effective?



Unit: percentages // Base: Free digital content consumers 2023 (n=2415)



Music | Summary



Piracy consumers in **physical or digital** format



There was a slight drop in the number of consumers of illicit music, while the number of legal consumers in digital format remained stable.

(1) The purchase of vinyl records is added to the legal physical consumption of music.,

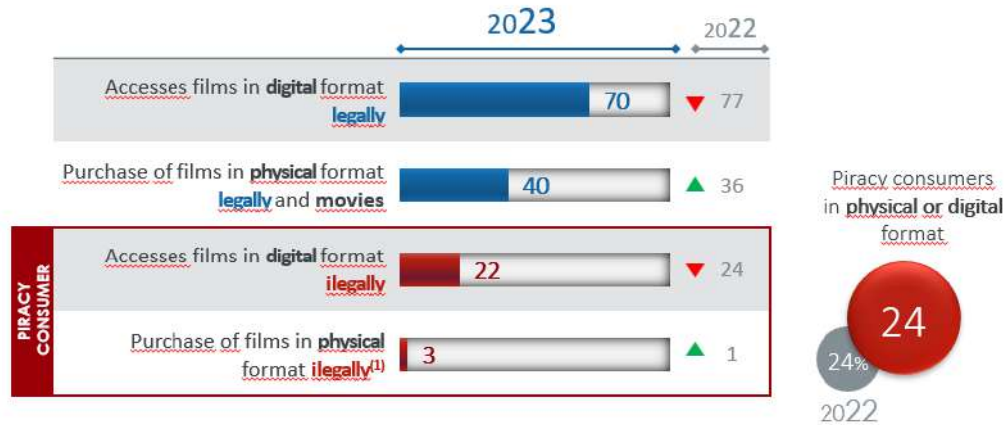
Unit: percentages // Base: Total internet users 2023: (n=3258); 2022: (n=3506)

▲ Significantly higher difference than 2022
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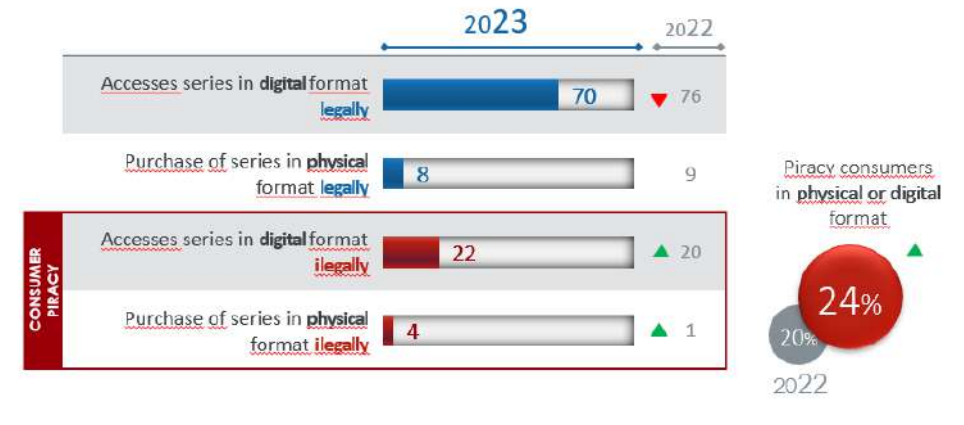


Films and Series | Summary

Films



Series



Rise in consumption of illicit movie content continues since pandemic

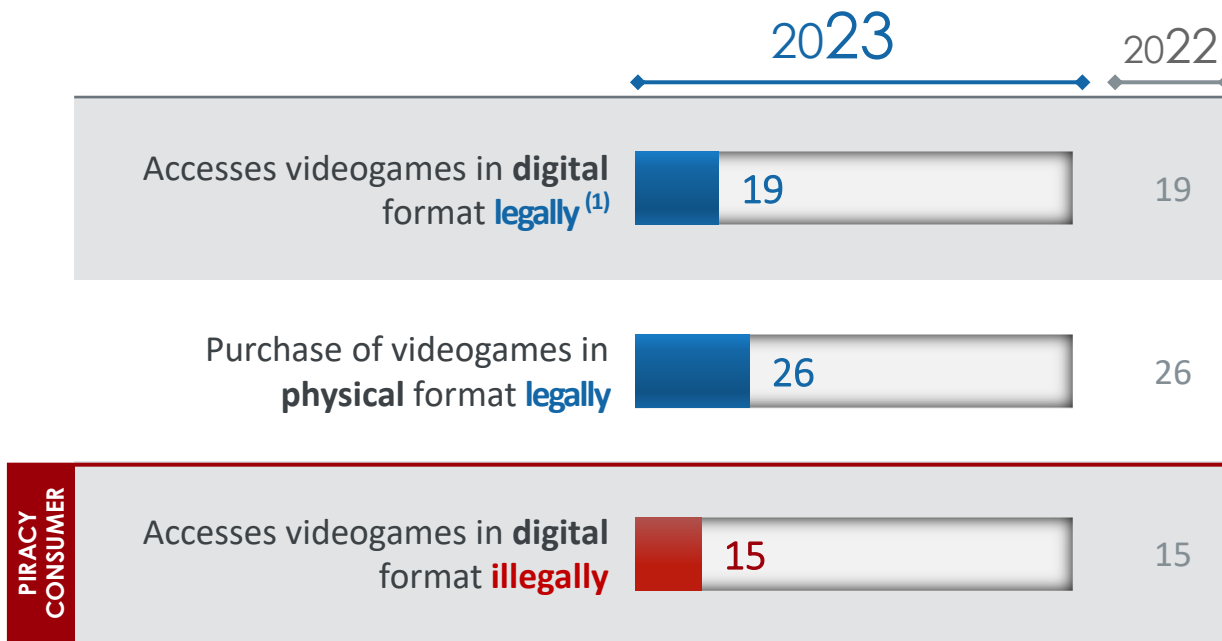
(1) Illegal physical consumption in movies is added to the purchase on pen drive or hard disk media.

Unit: percentages // Base: Total internet users 2023: (n=3258); 2022: (n=3506)

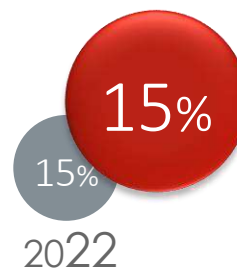
▲ Significantly higher difference than 2022
▼ Significantly lower difference than 2022



Videogames | Summary



Piracy consumers in **digital** format

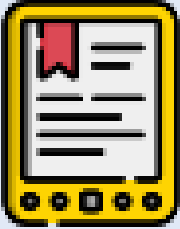


The number of illicit video game consumers does not evolve with respect to 2022.

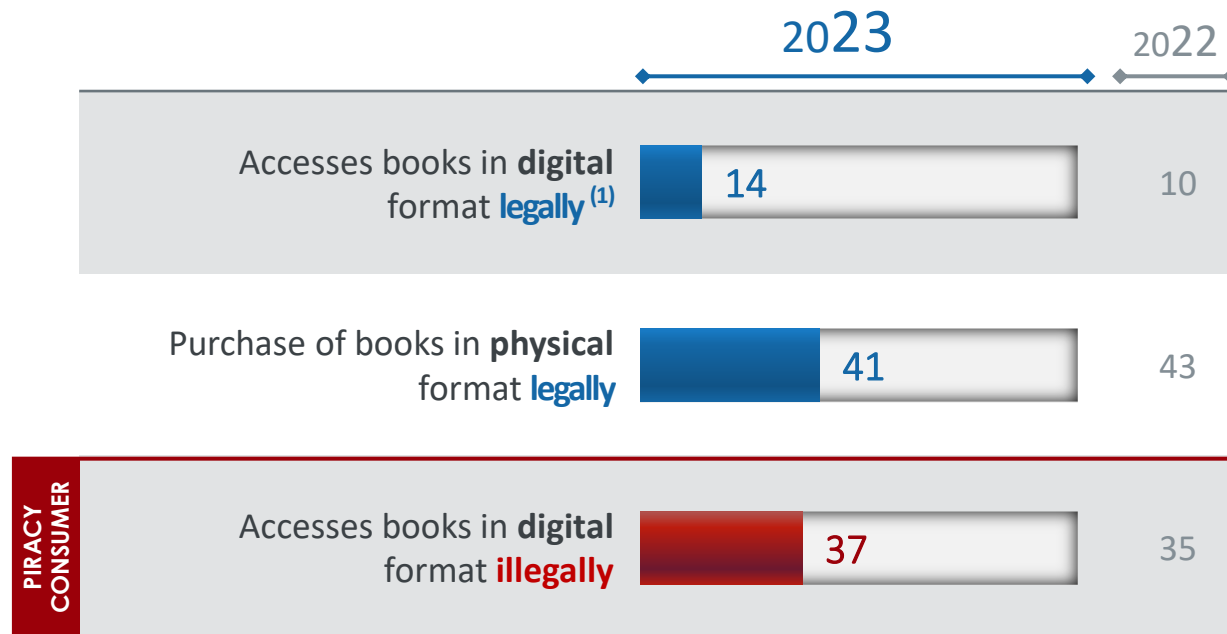
(1) Only legal paid digital consumption is obtained in Video Games.

Unit: percentages // Base: Total internet users 2023: (n=3258); 2022: (n=3506)

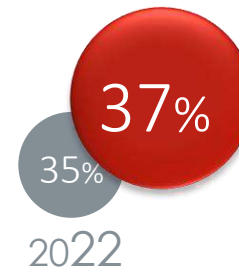
▲ Significantly higher difference than 2022
▼ Significantly lower difference than 2022



Books | Summary



Piracy consumers in **digital** format



Consumers of pirated books increase compared to 2022

In the case of legal digital access, the increase is determined by the inclusion this year of subscriptions to platforms such as Amazon Kindle, so it is not a comparable figure.

(1) Subscriptions to platforms such as Amazon Kindle are added to the legal digital consumption in books, therefore, they cannot be compared.

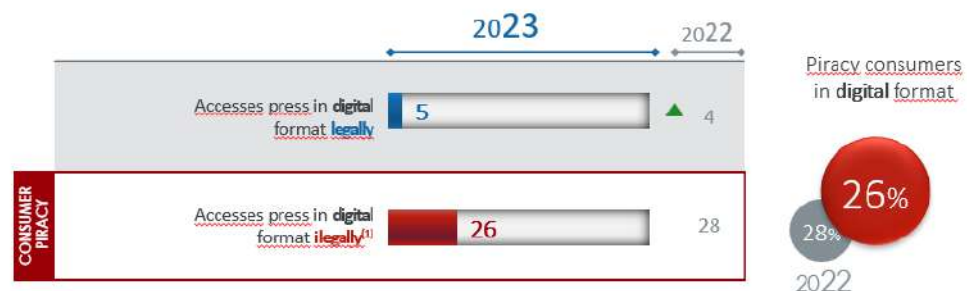
Unit: percentages // Base: Total internet users 2023: (n=3258); 2022: (n=3506)

▲ Significantly higher difference than 2022
▼ Significantly lower difference than 2022



Press and Magazines | Summary

Press



Magazines



The number of illicit press (newspapers and magazines) consumers increases
The licit consumption of newspapers in digital format increases, the illicit one remains unchanged compared to 2022.

(1) Access to paywall newspaper subscriptions without a subscription is added.

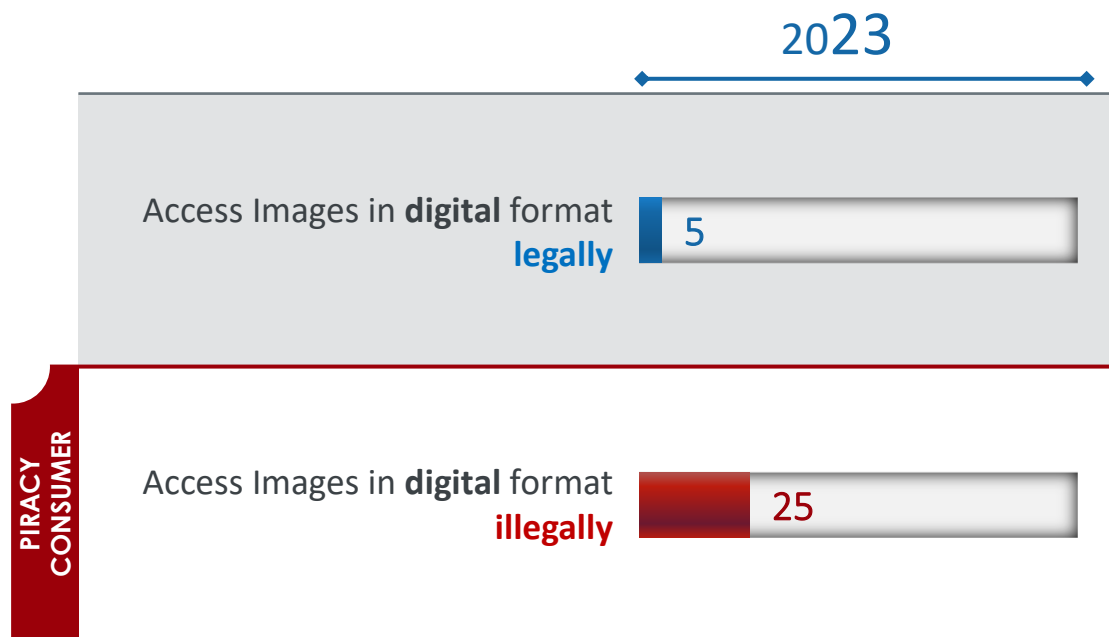
(2) Messaging and RRSS apps are removed from the list of portals for free newspaper download access, so there is no comparison with the year 2022.

Unit: percentages // Base: Total internet users 2023: (n=3258); 2022: (n=3506)

▲ Significantly higher difference than 2022
▼ Significantly lower difference than 2022



Images | Summary



Piracy consumers
in **digital** format



1 in 4 Internet users
have consumed images
illegally.

Illegal digital access

Although illegal content consumption declined in practically all industries, with the exception of Music and Magazines, the value of content increased by 5% (1.6 billion in 2022), due to the increase in the cost of content.



	2023 VOLUME (million of contents)		% individuals who access		2023 VALUE (million Euro)	
				Variation with 2022		
Music		2.369 ▲ (+1%)	30%	▼ (-7%)	11.320 ▲ (+10%)	
Films		550 ▼ (-3%)	22%	▼ (-7%)	6.153 ▲ (+1%)	
Videogames		308 ▼ (-5%)	15%	▼ (-2%)	9.117 ▲ (+3%)	
Books		524 ▼ (-3%)	37%	▲ (+4%)	4.920 ▲ (+1%)	
Series		952 ▼ (-3%)	22%	▲ (+10%)	1.761 ▲ (+9%)	
Press		231 ▼ (-13%)	26%	▼ (-8%)	347 ▼ (-13%)	
Magazines		145 ▲ (+28%)	22%	▲ (+27%)	340 ▲ (+28%)	
Images		407	25%		712	

▲ Significantly higher difference than 2022
▼ Significantly lower difference than 2022

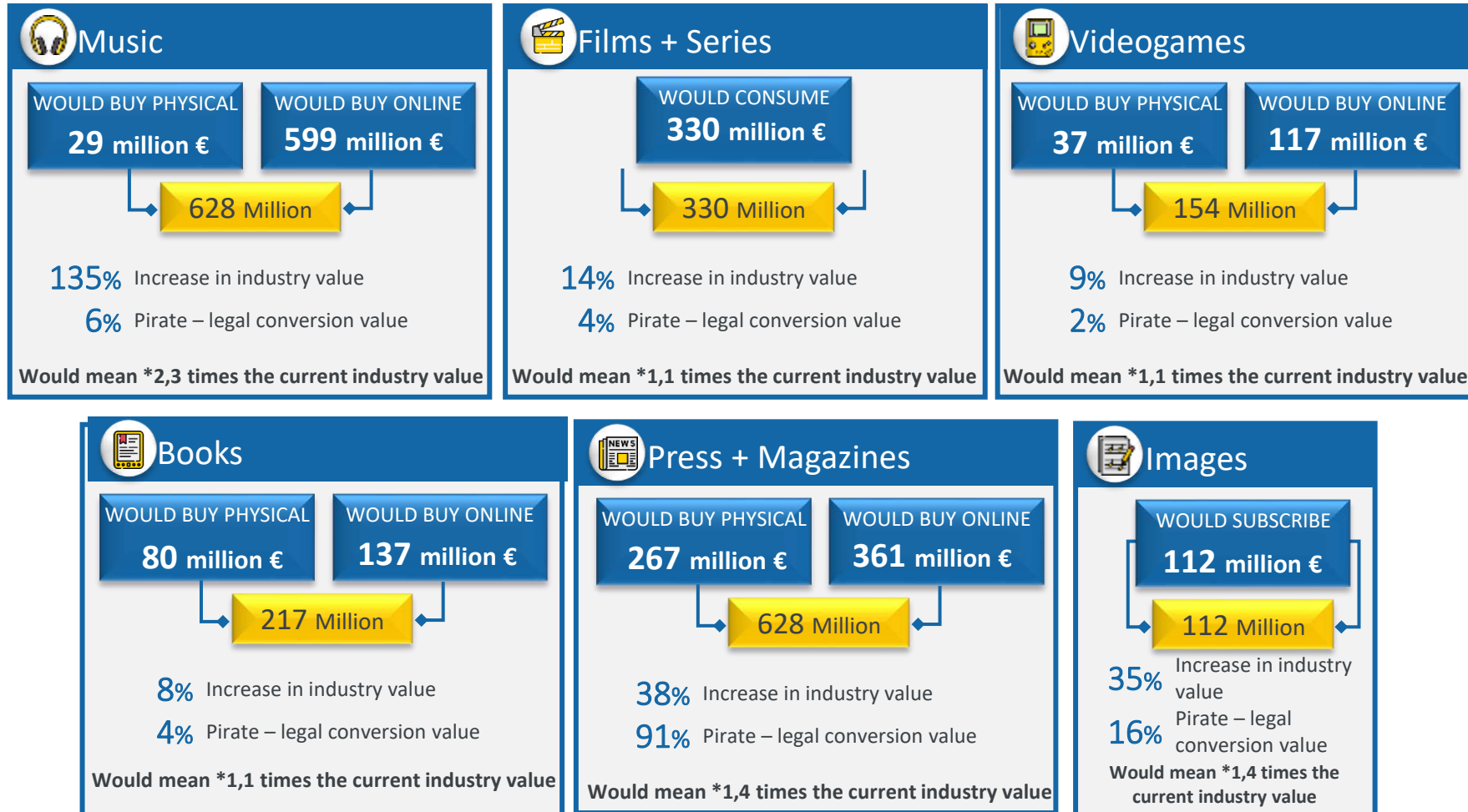
Million of contents **5.079** ▼ (-1%)⁽¹⁾

Million Euro **33.957** ▲ (+5%)⁽¹⁾

⁽¹⁾ The total contents, both in number and value, have been made without the data from Images, the methodology has changed with respect to 2022, they are estimated data without consolidation until future measurements.

Summary | Lost profit in industry in Spain due to the effect of piracy ⁽¹⁾

The lost profit in 2023 for the industries was **1.992 million** euro



(1) Overall result does not include the data from Images, as it is an estimated data since it is not consolidated, and there may be variations in future measurements.

Unit: percentages // Base: Total internet users 2023: (n=3258); 2022: (n=3506)

Industry value + profit lost (1)

Profit lost this year has an increasing variation in Music, Books and Press, while Films/Series and Videogames decrease. All industries increased compared to 2022.



		Industry value	Profit lost	TOTAL		2023			Variation with 2022		
						Industry	Profit lost	TOTAL	Industry	Profit lost	TOTAL
MUSIC	Physical	62	29	91	91	466	628	1094	+16%	+16%	+16%
	Digital	404	599	1.003	1.003						
VIDEOGAMES	Physical	419	37	455	455	1720	154	1873	+9%	-4%	+8%
	Digital	1301	117	1418	1.418						
BOOKS	Physical	2579	95	2674	2.674	2718	253	2971	+6%	+16%	+7%
	Digital	139	158	297	297						
FILMS + SERIES	Physical + Digital	2.360	330	2.690	2.690	2.360	330	2.690	+25%	-15%	+18%
PRESS + MAGAZINES	Physical	983	267	1.250	1.250	1.666	628	2.294	+3%	+26%	+9%
	Digital	683	361	1.044	1.044						
IMAGES	Digital	316	112	359	428	316	112	428	0%	-	-

(1) Overall result does not include the data from Images, as it is an estimated data since it is not consolidated, and there may be variations in future measurements.

Unit: percentages // Base: Total internet users 2023: (n=3258); 2022: (n=3506)

Employment (1)

According to the data obtained from the market share that the industries are losing, 107 thousand jobs could be generated, both directly and indirectly. And the public treasury would receive 600 million Euros, distributed among the VAT of the purchased contents, the Social Security and the IRPF of the jobs generated.



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

1.992 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.

17.902 DIRECT Jobs

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

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

107.410 total jobs

Total lost income in public funds

600 Million euro

357
VAT

188
Social Security

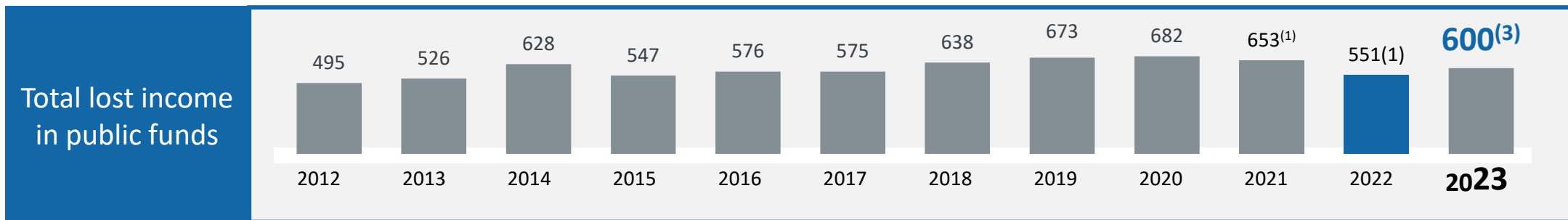
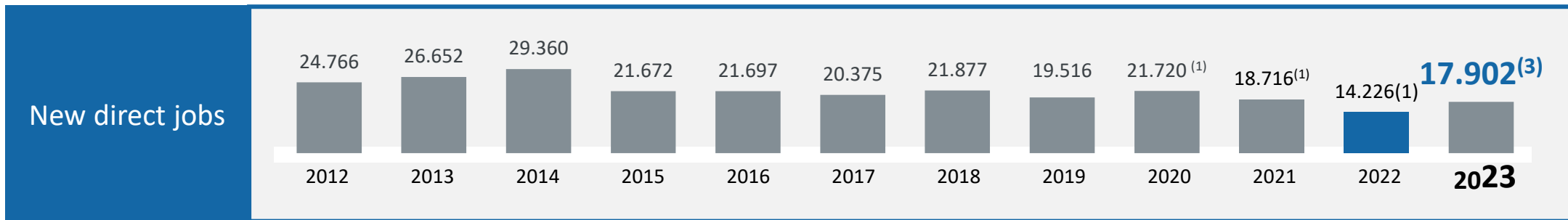
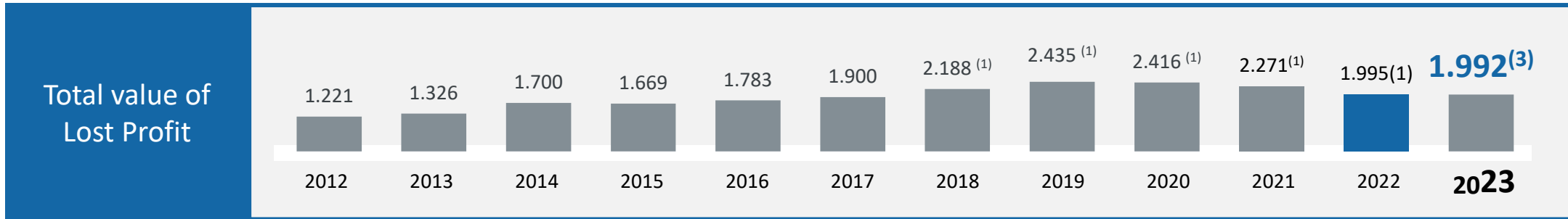
55
IRPF

(1) Overall result does not include the data from Images, as it is an estimated data since it is not consolidated, and there may be variations in future measurements.

Unit: percentages // Base: Total internet users 2023: (n=3258)

Piracy impact⁽²⁾

With respect to 2022, this year 2023 increases 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 – 357
S. Security – 188
IRPF – 55

(1) Includes data from Press, Magazines (3) Scores are not included.

(2) Overall result does not include the data from Images, as it is an estimated data being the first year that they are measured and not consolidated, and there may be variations in future measurements.

Unit: percentages // Base: Total internet users 2023: (n=3258)

THANK YOU

GfK

OBSERVATORIO 2023 DE PIRATERÍA Y HÁBITOS DE CONSUMO DE CONTENIDOS DIGITALES



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