

2019 PIRACY OBSERVATORY AND DIGITAL CONTENT CONSUMPTION HABITS

In Spain, each time users access less to illegal contents, although piracy continues at high levels, giving a break to spread legal offer. In 2019, the number of illegal contents to which public accessed was **5,187** billion, which represents a decrease of **5%** compared to 2018, and an accumulated fall since 2015 of **17%**.

The damage caused to the sector reached **2,437** billion euros. The Public Purse stopped receiving **673** million euros and with this amount, there could have been created **117,097** direct and indirect jobs.

LOST PROFIT
2,437
millions of euros

PUBLIC PURSE
673
millions of euros
STOPPED RECEIVING

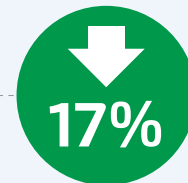
NEW JOBS
117,097
DON'T CREATED

PIRACY

Experiences another 5% fall.

2018 — — 2019

2015



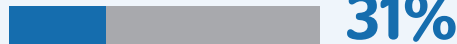
2019

1 Access to contents



Slightly decreases the number of consumers of illegal and legal music.

MUSIC

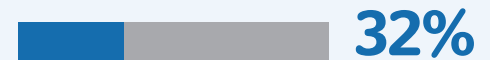


Piracy consumers in physical or digital format.



The legal consumption of movies increases and the illegal consumption decreases.

FILMS



Piracy consumers in physical or digital format.



The legal consumption of video games is maintained but illegal consumption increases.

VIDEOGAMES

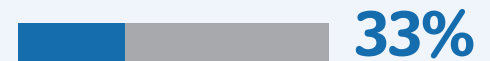


Piracy consumers in digital format.



The consumption of books increases, both legal and illegal.

BOOKS

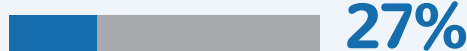


Piracy consumers in digital format.



The legal consumption series increases and the illegal consumption decreases.

SERIES

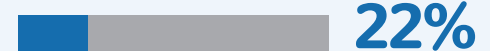


Piracy consumers in physical or digital format.



Football consumption through illegal channels decreases and legal consumption increases.

FOOTBALL

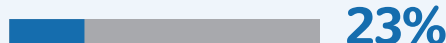


Piracy consumers in digital format.



The illegal consumption of press and magazines in digital format triples the legal one.

PRESS

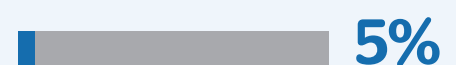


MAGAZINES



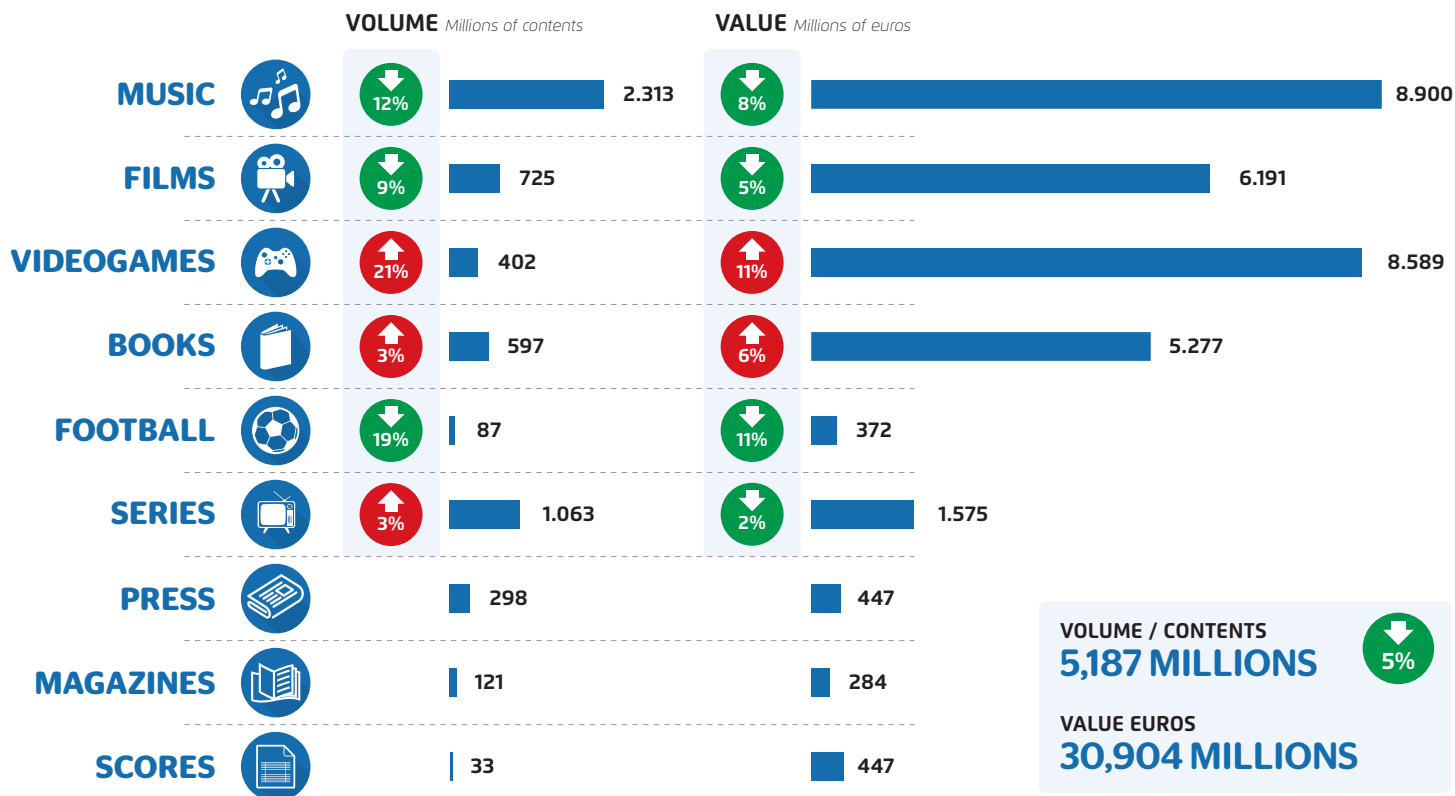
The illegal consumption of scores is lower than the legal consumption.

SCORES



Piracy consumers in digital format.

2 Illegal digital access



3 Illicit access in terms of age of content

Most of the consumed contents are new releases in all the industries.

From release up to a year:

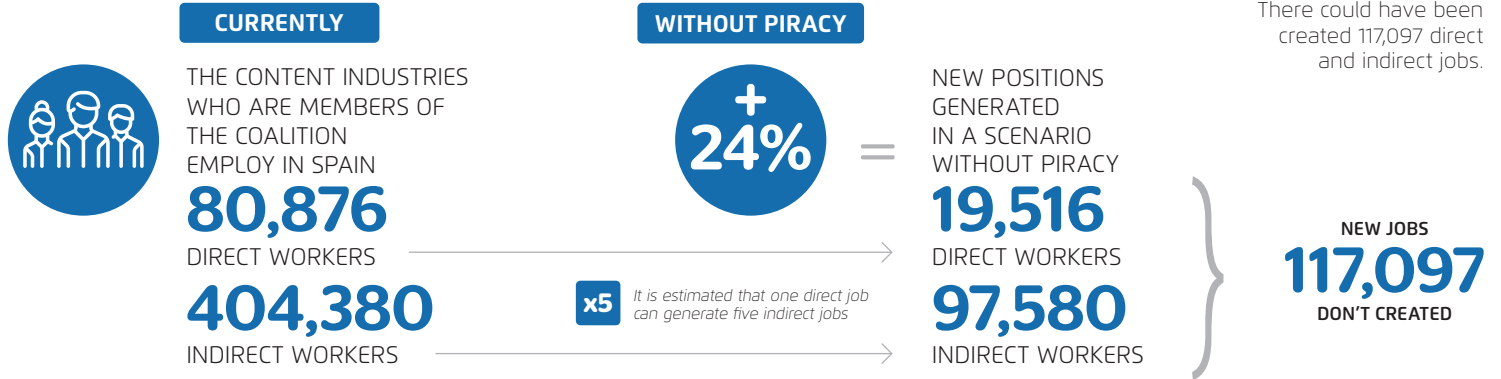


4 Lost profit in industry in Spain due to the effect of piracy

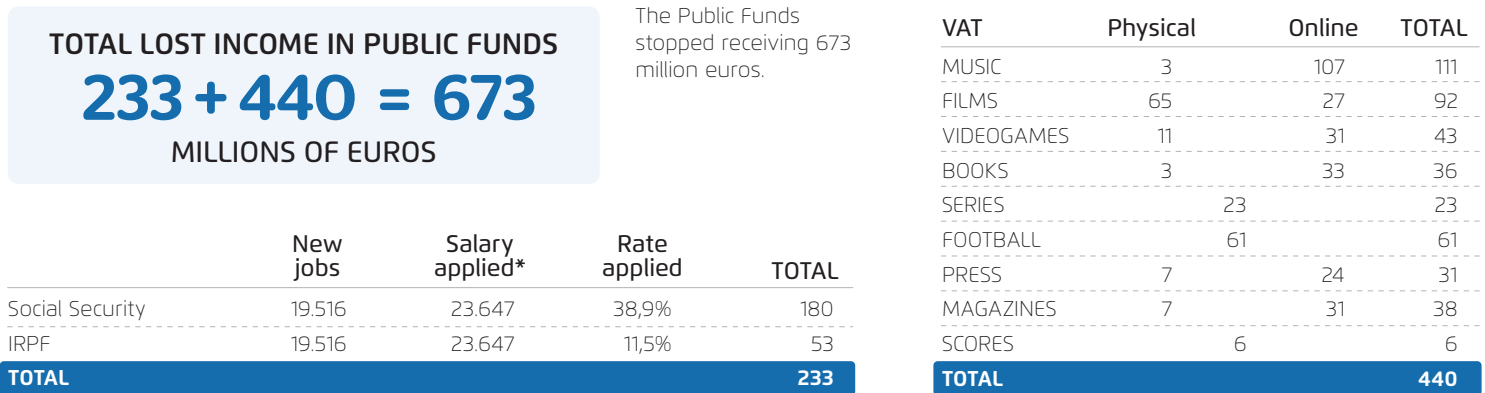
The lost profit in 2019 for the industries was 2.437 million euros.



5 Consequences for employment



6 Public funds cease to receive...

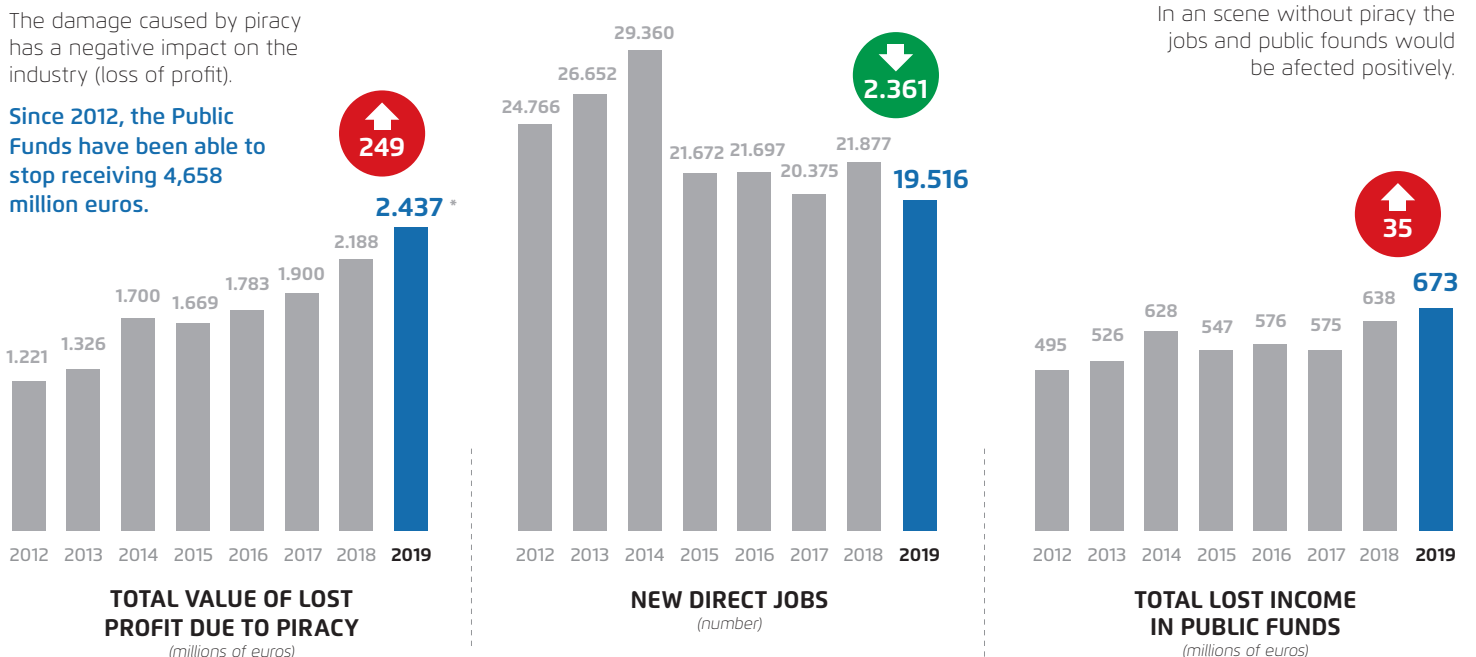


Unit: millions of euros. Without Press and Magazines representation because 2019 is the first measurement in this study.
(* Average salary applied over GfK estimation based on data from the Annual Survey of Structural Salaries from INE.

7 Impact of piracy

The damage caused by piracy has a negative impact on the industry (loss of profit).

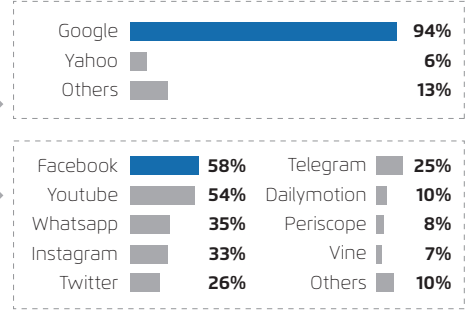
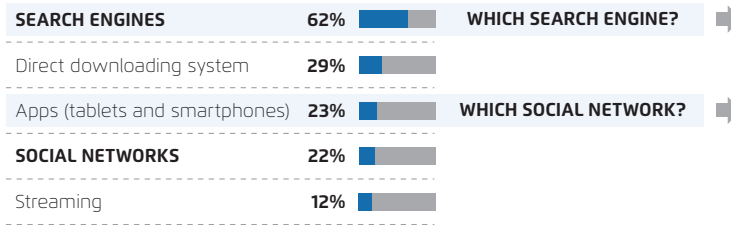
Since 2012, the Public Funds have been able to stop receiving 4,658 million euros.



(*) (1) Data with representation of Press, Magazines and Scores.

8 How do they access illicit contents?

6 out of every 10 internet users use search engines to access illicit contents. In 2019 the rise of the access through Social Networks (Facebook, Whatsapp, Telegram...) stands out.



DISTINCTION BETWEEN LEGAL AND NON-LEGAL

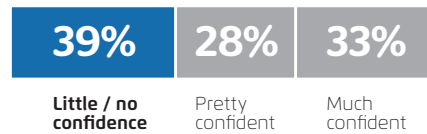


The reason why they say they access illegal content that increases the most in 2019 is because they already paying for their Internet connection. However, the degree of awareness about piracy positively increases.

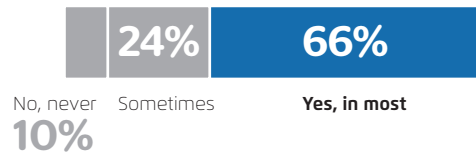
9 How illicit portals are financed?

7 out of 10 users who have acceded illicit contents had to register as a user. 4 out of 10 distrust these portals when they have to give information.

WHAT DEGREE OF CONFIDENCE GIVES YOU TO PROVIDE THIS INFORMATION?



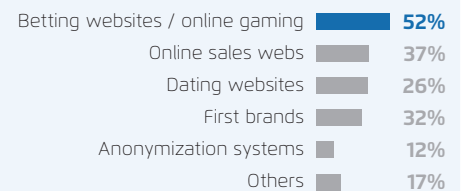
WHEN YOU ACCESS TO ILLICIT CONTENTS YOU WERE ASK TO ACCEPT THE COOKIES?



SOURCES OF INCOME

Virtually all of the illegal content portals have advertising.

ADVERTISING THEY RECALL



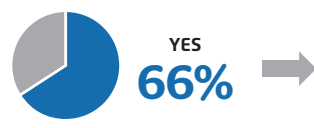
WHEN YOU ACCESS TO THESE CONTENTS DO THEY HAVE ADVERTISING?



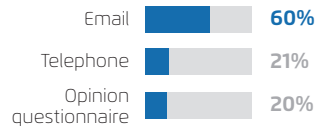
HAS PAID FOR THE CONTENT DOWNLOADED IN THESE PAGES



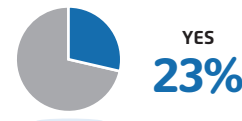
DID THEY HAVE TO REGISTER AS AN USER?



WHAT DETAILS DID THEY HAVE TO PROVIDE?



HAS FILLED OUT A SURVEY WHEN THEY ACCESS TO THE CONTENT?



10 Tutorials to learn how to download content

Tutorials on how to download content and use platforms.

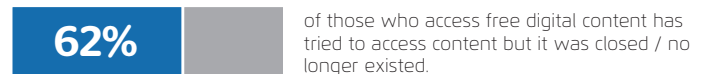


The most used are those that show how to download music (17%).

EQUIPMENT



CONTENT PORTAL



11 Effectiveness of measures against piracy

8 out of 10 consider that the most effective measures against piracy are blocking websites with illicit contents and sanctions on Internet providers. However, the least effective measure is sanctioning users with fines.

