



















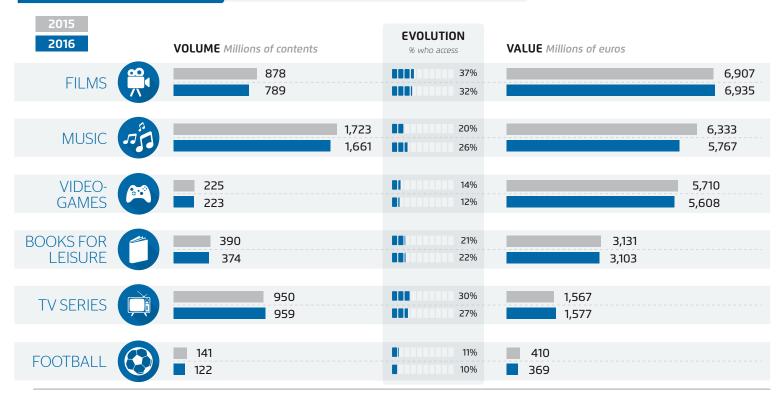




PIRACY OBSERVATORY AND DIGITAL 2016

ILLEGAL DIGITAL ACCESS

THE ACCESS TO PIRATE CONTENTS DECREASES A 4.2%



4.128 MILLIONS OF CONTENTS

TOTAL

23.294 MILLIONS OF EUROS

2015 (24,058 MILLIONS = -3%)

LOSS OF POTENTIAL EARNINGS FOR INDUSTRIES IN SPAIN DUE TO PIRACY

2015 (4,307 MILLIONS = -4%)

LOST PROFITS: 1,783 MILLION EUROS IT COULD MEAN A **48%** INCREASE IN BILLING FOR THE INDUSTRY

Millions of euros



Would buy physical films: 439 Would buy films online: 134

increase industry

pirate-legal conversion value

MUSIC

Would buy physical music: 17 Would buy music online: 398

pirate-legal conversion value

VIDEOGAMES

Would buy physical videogames: 205 Would buy videogames online: 42

33%

increase industry value

4% pirate-legal conversion value

BOOKS FOR LEISURE

Would buy physical books: 82 Would buy books online: 25

increase industry value

3% pirate-legal conversion value

TV SERIES

Would pay for TV series

137% increase industry value 11%

pirate-legal conversion value



Would subscribe to football

25%

increase industry value

73% pirate-legal conversion value



























CONSEQUENCES FOR EMPLOYMENT

MORE THAN 110,000 JOBS COULD BE CREATED IN A ZERO PIRACY MARKET



THE CONTENT **INDUSTRY IN SPAIN CURRENTLY EMPLOYS** DIRECT **WORKERS**

WHITOUT **PIRACY**

NEW JOBS GENERATED IN A SCENARIO WITHOUT PIRACY

It is estimated that one direct job can generate five indirect jobs



PUBLIC FUND FAIL TO RECEIVE

STATE TREASURY CEASES TO RECEIVE **576 MILLION EUROS** WORTH OF TAXES LIKE VAT, SOCIAL SECURITY CONTRIBUTIONS AND REVENUE TAXES DUE TO PIRACY

STATE TREASURY CEASES TO RECEIVE 360.7 + 21

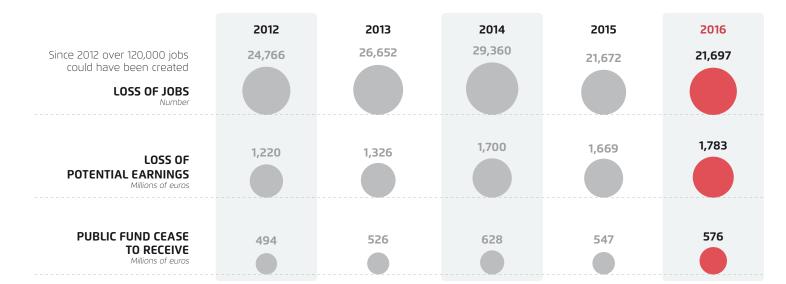
Physical	Online	TOTAL
3.6	83.6	87.2
92.4	28.1	120.3
43.1	8.8	51.9
3.3	5.3	8.5
56.9		56.9
35.9		35.9
		360.7
	3.6 92.4 43.1 3.3	3.6 83.6 92.4 281 43.1 8.8 3.3 5.3 56.9

(*): Average salary applied on GfK estimation based on the data from the Annual Survey of Structural Wages of the National Institute of Statistics concluding an average salary of €19,674.1

	New jobs	Salary applied*	Rate applied	TOTAL
Social security contribution	21,697	19,674.1	38.9%	166.05
Personal Income Tax	21,697	19,674.1	11.5%	49.09
TOTAL SOCIAL SECURITY CONTRIBUTION + PERSONAL INCOME TAX				

FVOLUTION LOSS OF POTENTIAL EARNINGS AND EMPLOYMENT

STATE MAY HAVE CEASED TO RECEIVE 2,772 MILLION EUROS SINCE 2012 DUE TO PIRACY



6













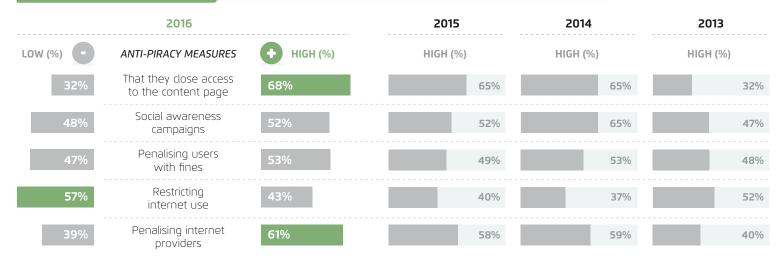






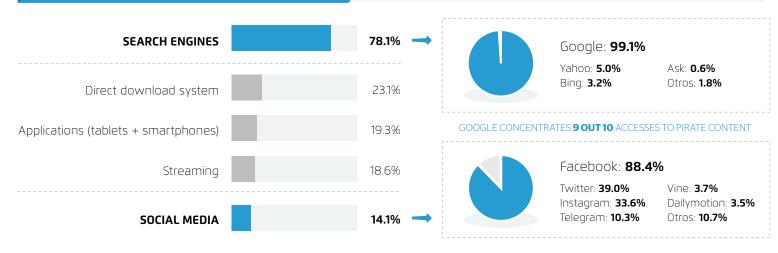
EFFECTIVENESS OF

68% OF INTERNET USERS AGREE THAT BLOCKING THE ACCESS TO PIRATE WEBSITES WOULD BE THE MOST EFFECTIVE MEASURE



HOW DO THEY ACCESS ILLEGAL CONTENT?

78% OF USERS ACCESS TO ILLEGAL CONTENTS THROUGH SEARCH ENGINES



HOW DO PIRATE WEBSITES FINANCE? **67%** OF PIRATE WEBSITES FINANCE SELLING AD SPACE **DID YOU HAVE TO DOES IT HAVE HAVE YOU PAID? MEANS OF PAYMENT** (2015) **REGISTER AS A USER** ADVERSISING? Others and Paypal (9%) 59.8% (24.6%)Have you ever paid for the contents On most of the sites On most of the sites Donation downloaded on 33.8% (36.4%) 67.0% (74.2%) 10.0% (11.5%) those pages?

ADVERTISING THEY RECALL



Online betting and / or gambing websites



Contact or dating websites



Adult content websites



Consumer products (food, cars, etc.)



Credit

cards

35.6%

(50.9%)

(20.0%)

SMS 11.2%

Others



RESOURCE: GfK | Piracy Observatory | April 2017















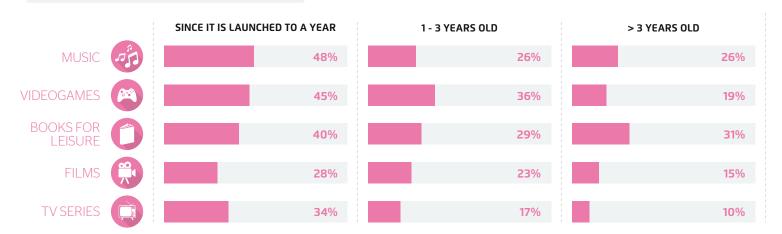




FEDERACIÓN PARA LA PROTECCIÓN DE LA PROPIEDAD INTELECTUAL

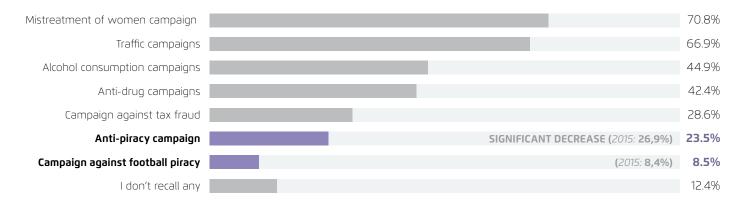
SENIORITY OF ILLEGAL CONTENTS

MOST OF PIRATE CONTENTS ARE NEW RELEASES



CAMPAIGN AWARENESS

BARELY **2 OUT OF 10** REMEMBER CAMPAIGNS AGAINST PIRACY



SUMMARY MAIN ATTITUDES AND AWARENESS

8 OUT OF 10 RESORT TO PIRACY BASED ON THE BELIEF THEY ARE NOT HURTING ANYONE OR THERE ARE NO LEGAL CONSEQUENCES

