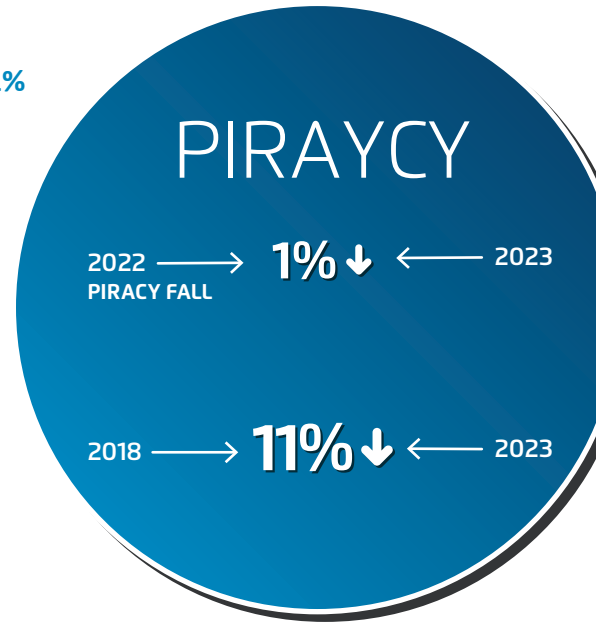
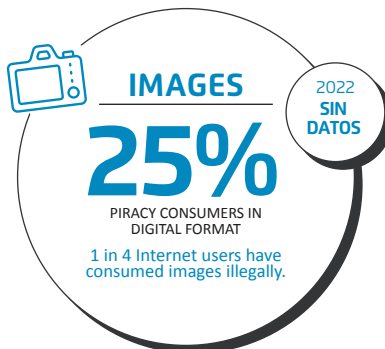
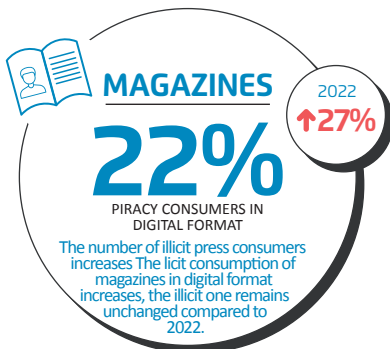
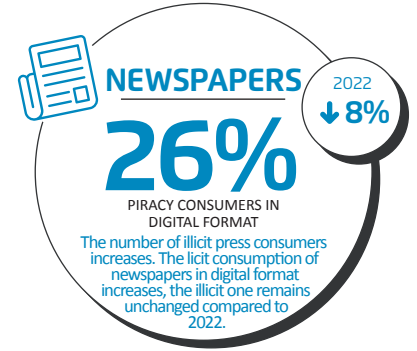
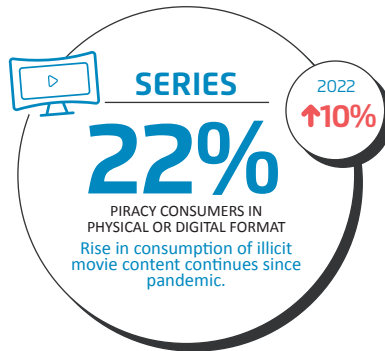
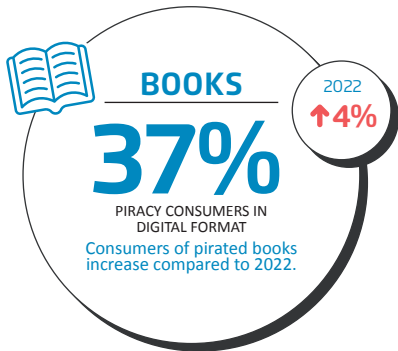
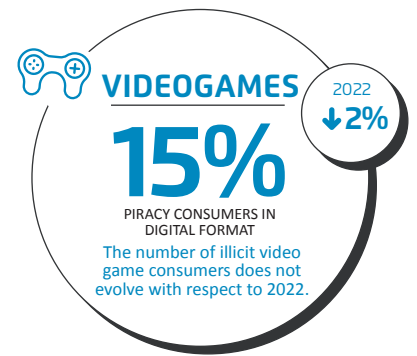
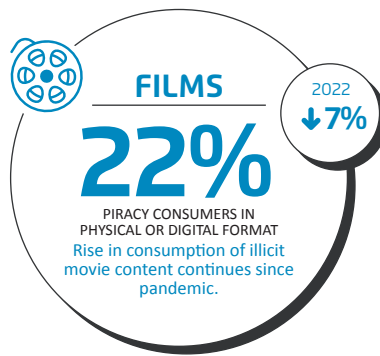
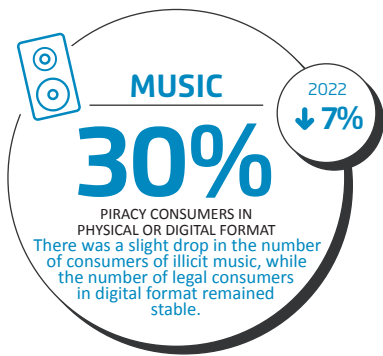


In 2023, the number of illicit content accessed was **5.079** billion, down **1%** from 2022 and down around **11%** from 2018.

The loss in 2023 for the industries was **1.992** million euros. The public purse lost **600** million euros and **107.410** direct and indirect jobs could have been created.



1 ILICIT CONSUMPTION BY SECTOR

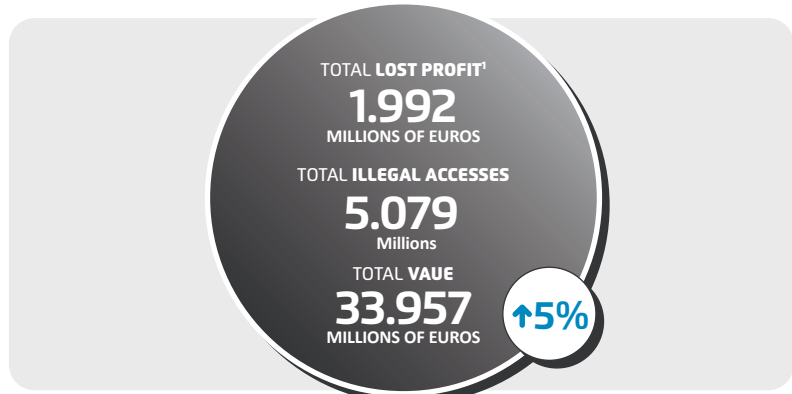
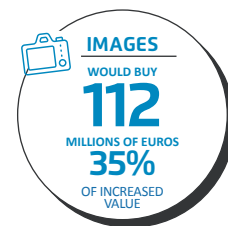
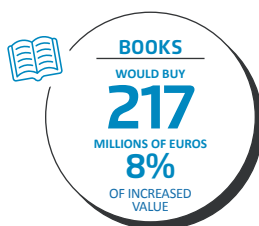
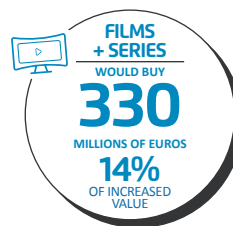
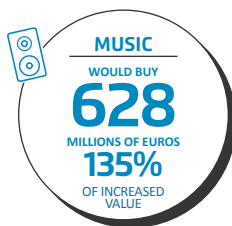


The total contents, both in number and value, have been made without the data from Images, the methodology has changed with respect to 2022, they are estimated data without consolidation until future measurements.

2 ILLEGAL ACCESSES, THEIR VALUE AND LOST PROFITS DUE TO THE EFFECT OF PIRACY

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

	VOLUMEN MILLIONS OF CONTENTS	VALOR MILLIONS OF EUROS
MUSIC	+1% 2.369	+10% 11.320
FILMS	-3% 550	+1% 6.153
VIDEOGAMES	-5% 308	+3% 9.117
BOOKS	-3% 524	+1% 4.920
SERIES	-3% 952	+9% 1.761
NEWSPAPERS	-13% 231	-13% 347
MAGAZINES	+28% 145	+28% 340
IMAGES	407	712



(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.

Data in millions of euros and percentage (%).

3 CONSEQUENCES FOR EMPLOYMENT

NEW JOBS WOULD BE GENERATED

It is estimated that 1 direct job can generate 6 indirect jobs

x6

17.902 → DIRECT JOBS

107.410 NOT CREATED

According to the data obtained from the market share that industries are no longer invoicing, more than 107,000 direct and indirect jobs could be generated.

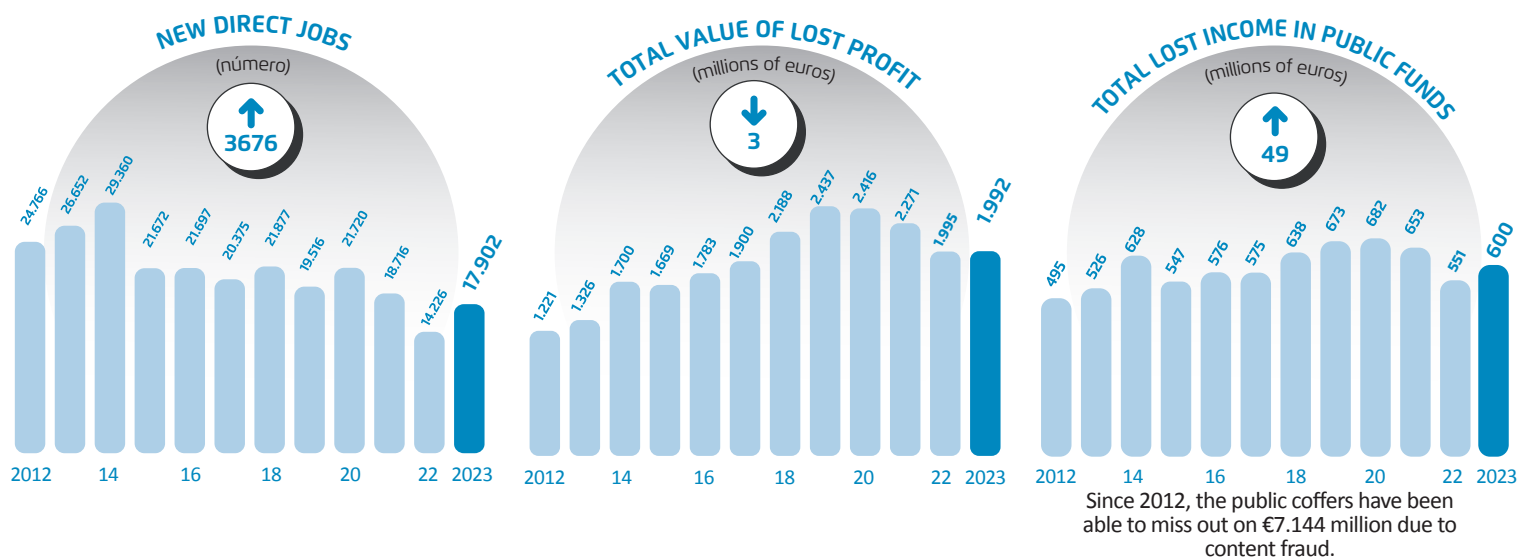
4 CONSEQUENCES FOR PUBLIC COFFERS

PIRACY CAUSES THE PUBLIC COFFERS TO LOSE MORE THAN 600 MILLION EUROS IN VAT, PERSONAL INCOME TAX AND SOCIAL SECURITY CONTRIBUTIONS.

THE PUBLIC COFFERS NO LONGER RECEIVE



5 EVOLUTION OF EMPLOYMENT, LOSS OF INCOME AND TAXES



6 ACCESS TO ILLEGAL CONTENTS

DO YOU KNOW HOW TO DISTINGUISH BETWEEN LEGAL AND ILLEGAL WEBSITES??



WHICH SEARCH ENGINE?

Google 92%

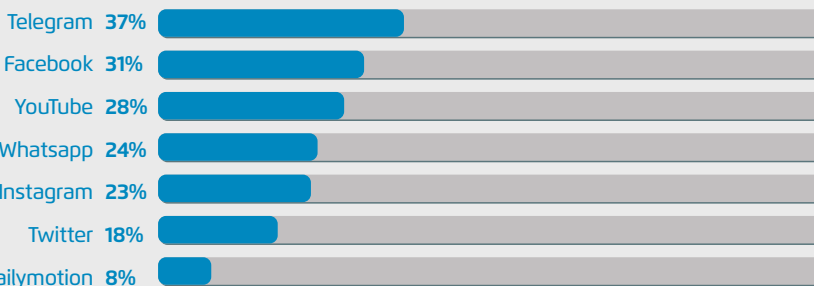
Bing 8%

Yahoo 6%

Brave 5%

Otros 7%

WHICH SOCIAL NETWORK / MESSAGING?

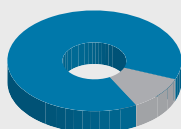


SEARCH ENGINES	55%
SOCIAL NETWORKS AND MESSAGING	27%
Direct download system	27%
Direct download system	23%
Streaming	24%

7 HOW ARE ILLICIT PORTALS FINANCED? ADVERTISING

HAS ACCESSED PORTALS WITH ADVERTISING

89%

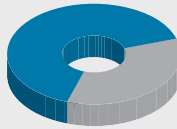


WHAT TYPE OF ADVERTISING?

Online betting or gambling websites	45%
Online sales websites	37%
Contact or dating websites	30%
Leading brands	28%
Anonymization systems	17%
Other	16%

RECEIVE MORE SPAM AND ADVERTISING

65%

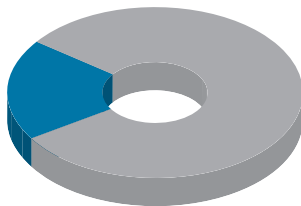


HOW WOULD YOU DESCRIBE THIS ADVERTISING?

You are annoyed by advertising	58%
You are often chased by advertising on other websites	21%
You don't like the products they advertise	19%
You consider it to be harmful	15%
It is not like that of other websites	14%
It is advertising that embarrasses you	14%
Not suitable for minors	10%

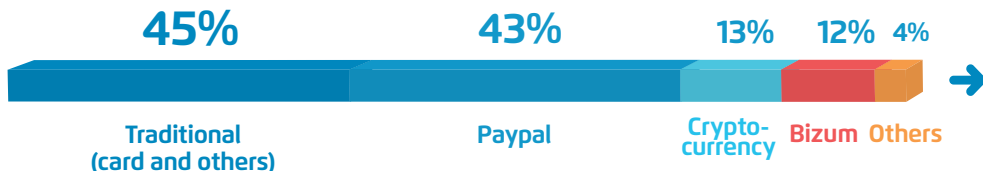
8 HOW ARE ILLICIT PORTALS FINANCED? METHOD OF PAYMENT

24%
paid for the
downloaded content



50%

It is safer to pay with
cryptocurrencies in this
type of portals



USE CRYPTOCURRENCIES
AS A METHOD OF PAYMENT

9 HOW ARE ILLICIT PORTALS FINANCED? OBTAINING PERSONAL DATA

DO YOU NEED TO
SIGN UP AS A
REGISTERED USER?

65%

IN MOST / QUITE A FEW
PORTALS

WHAT DATA DID YOU
HAVE TO PROVIDE FOR
REGISTRATION?

52% EMAIL
20% QUESTIONNAIRE
21% TELEPHONE

HOW CONFIDENT
DO YOU FEEL ABOUT
PROVIDING INFORMATION
TO THE PORTAL?

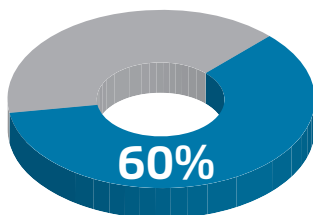
32% PRETTY
27% MUCH
41% NONE /
LITTLE

HAVE AN
IPTV
SET-TOP BOX

23%

10 CONTENT PORTALS

ATTEMPTED TO ACCESS A
PORTAL THAT TURNED
OUT TO BE CLOSED OR NO
LONGER EXISTS



Explained the
reasons for
closure

21%

13%

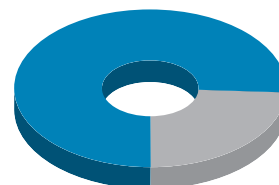
Were redirected
to another site

44% Torrent- type portal
19% Social Media
26% messaging group
11% Other portals

11 EFFECTIVENESS OF MEASURES

INTERNET USERS CONSIDER THAT BLOCKING OR
DISALLOWING ACCESS TO THE WEB WITH ILLEGAL CONTENT
IS THE MOST EFFECTIVE WAY TO DO THIS

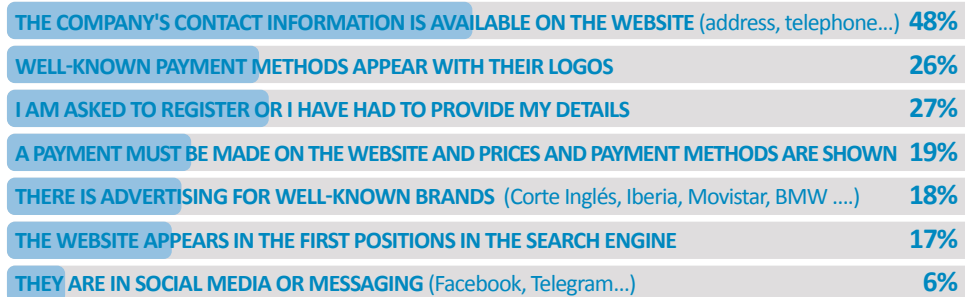
76%



12 HOW CONSUMERS THINK THEY CAN IDENTIFY A LEGAL PORTAL

Half of the users identify the legality of a portal if the company's contact details are available. 26% consider a portal legal if it displays known payment methods with logos and 27% consider legal the one that asks them to register or to which they had to give their data.

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



13 PERCEPTION OF CREATORS AND THE CULTURAL AND ENTERTAINMENT INDUSTRIES

Digital content creators and industries are a driving force for other sectors such as tourism, hospitality and telecommunications



Creators and cultural industries are a strategic sector for the economy and employment in our country



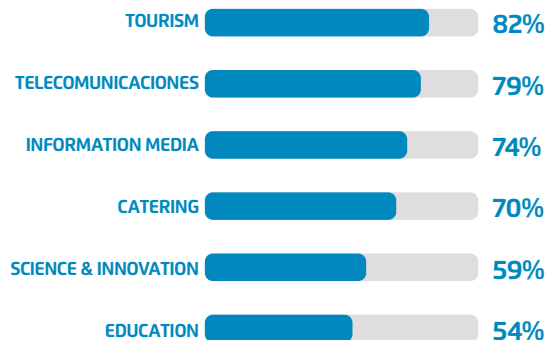
It is easy to access the legal offer to consume/access to culture and sports



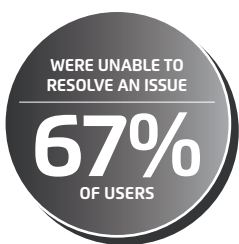
There is a sufficient legal offer of culture and sport in Spain



Which sectors do you see as empowering digital content creators and industries?



14 INCIDENTS IN THE DOWNLOADING OF ILLICIT CONTENT



15 CONSUMPTION OF FREE DIGITAL CONTENT

The main motivating factors to stop consuming free digital content would be potential credit card theft, personal data theft, virus infection, collaboration with a criminal organization or cyber threats.

Main barriers to access to the consumption of free digital contents

