

2018 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 2018, the number of illegal contents to which public accessed was 4,348 billion, which represents a decrease of 3% compared to 2017, and an accumulated fall since 2015 of 12%.

The value of the above-mentioned contents is of 23,918 billion euros and the damage caused to the sector reached 1,923 billion euros. The Public Purse stopped receiving 638 million euros and with this amount, there could have been created 131,262 direct and indirect jobs.

LOST PROFIT
1,923
millions of euros

PUBLIC PURSE
638
millions of euros
STOPPED RECEIVING

NEW JOBS
131,262
DON'T CREATED

PIRACY

Experiences another 3% fall.

2017 — 2018



2015



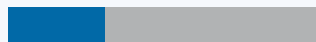
2018

1 ACCESS TO CONTENTS



There is an increase in the number of individuals who listen to music legally and piracy consumption decreases.

MUSIC



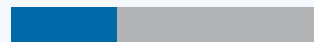
31%

Piracy consumers in physical or digital format.



The legal consumption of films increases and the illegal consumption decreases. Significant increase in subscription to platforms such as Netflix, HBO...

FILMS



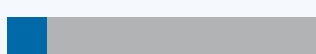
33%

Piracy consumers in physical or digital format.



Illegal consumption of videogames slightly increases and also the legal consumption.

VIDEOGAMES



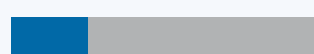
12%

Piracy consumers in digital format.



The illicit consumption of books in digital format is maintained and the legal consumption increases. Loose and zipper books included.

BOOKS



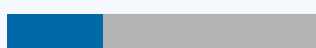
24%

Piracy consumers in digital format.



The legal consumption of series increases and the illegal consumption of digital contents decreases (30% vs 29%).

SERIES



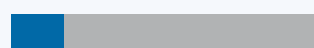
30%

Piracy consumers in physical or digital format.



The consumers that have watched football on illegal channels slightly increases. These are individuals not households.

FOOTBALL



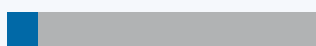
17%

Piracy consumers in digital format.



The illegal consumption of press in digital format is higher than the legal.

PRESS



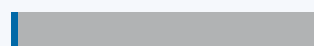
10%

Piracy consumers in digital format.



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

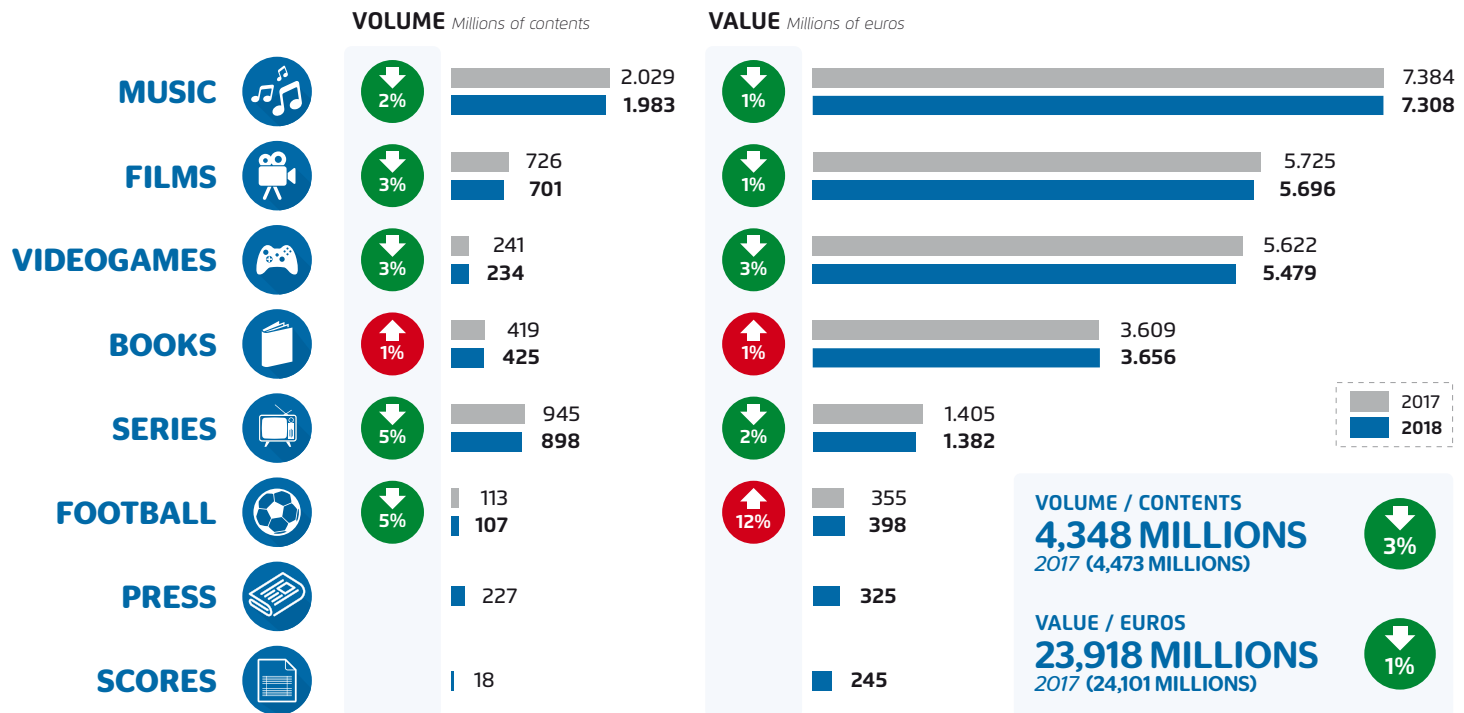
SCORES



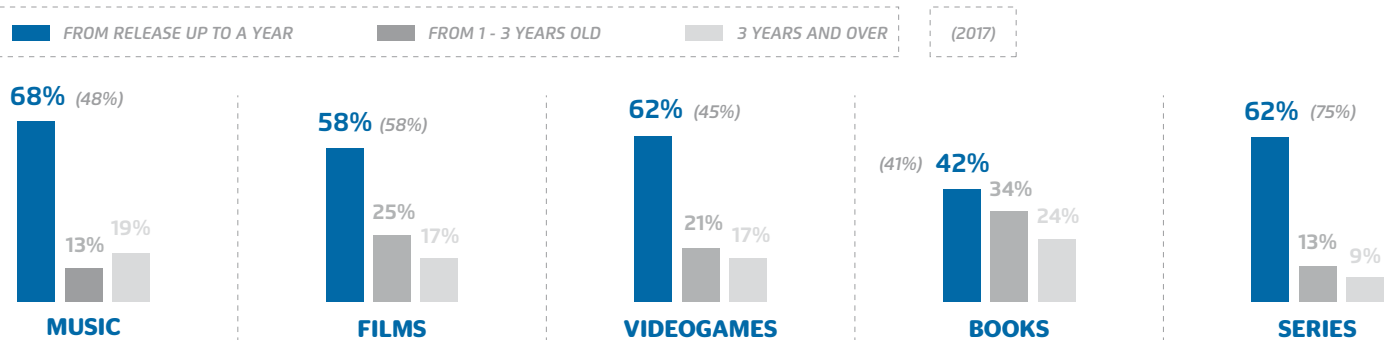
2%

Piracy consumers in digital format.

2 ILLEGAL DIGITAL ACCESS

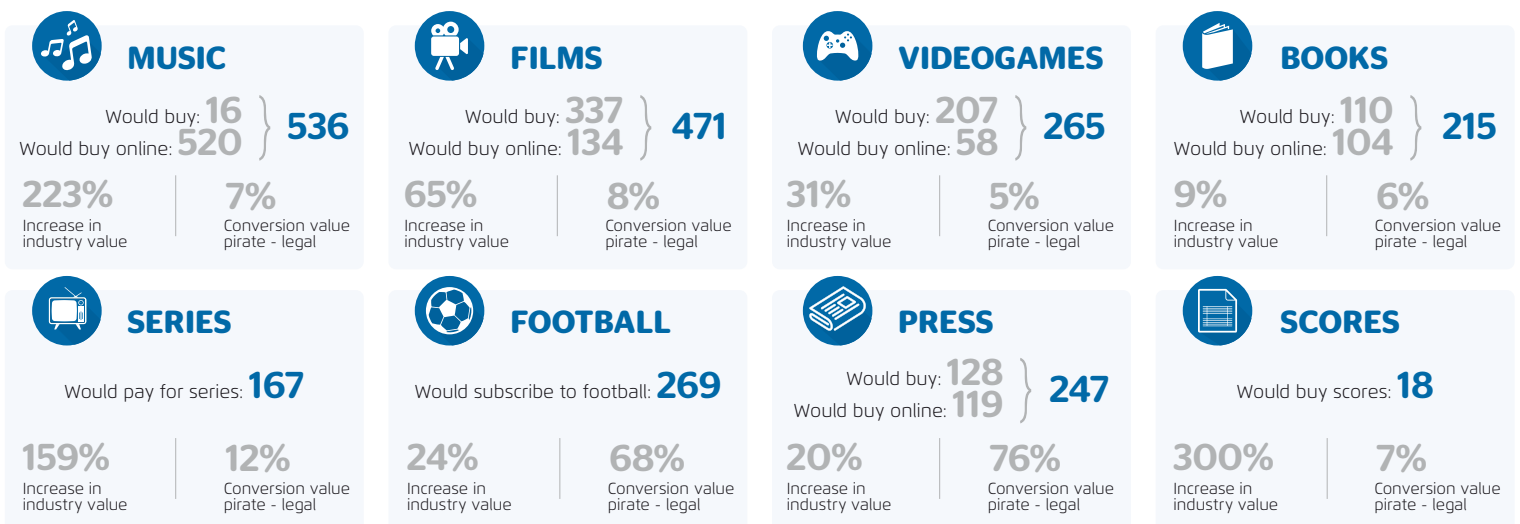


3 ILLICIT ACCESS IN TERMS OF AGE OF CONTENT



4 LOST PROFIT IN INDUSTRY IN SPAIN DUE TO THE EFFECT OF PIRACY

Millions of euros



5 CONSEQUENCES FOR EMPLOYMENT

There could have been created 131,262 direct and indirect jobs.



THE CONTENT INDUSTRY IN SPAIN CURRENTLY EMPLOYS **83.925** DIRECT WORKERS

WITHOUT PIRACY

+26%

NEW JOBS GENERATED IN A SCENARIO WITHOUT PIRACY
21.877
DIRECT JOBS

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

x5 109.385
INDIRECT JOBS

6 PUBLIC FUNDS CEASE TO RECEIVE...

The Public Purse stopped receiving 638 million euros.

Unit: millions of euros.

(* Average salary applied over GfK estimation based on data from the Annual Survey of Structural Salaries from INE.

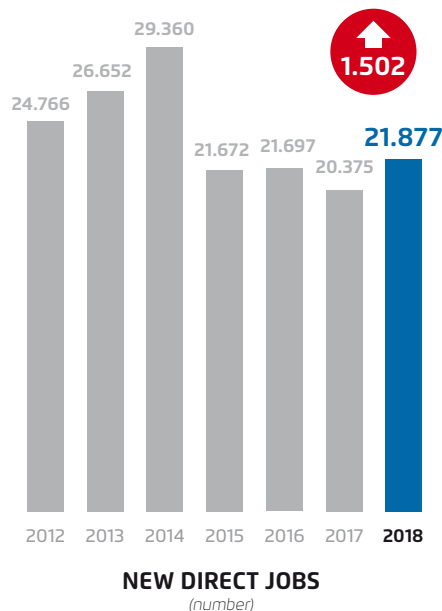
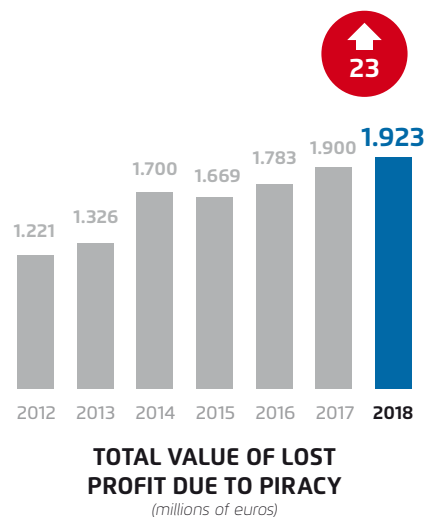
	New jobs	Salary applied*	Rate applied	TOTAL
Social Security	21.877	19.827	38,9%	169
IRPF	21.877	19.827	11,5%	50
TOTAL				219

VAT	Physical	Online	TOTAL
MUSIC	3	109	113
FILMS	71	28	99
VIDEOGAMES	43	12	56
BOOKS	4	22	26
SERIES		57	57
FOOTBALL		35	35
PRESS	5	25	30
SCORES		4	37
TOTAL			419

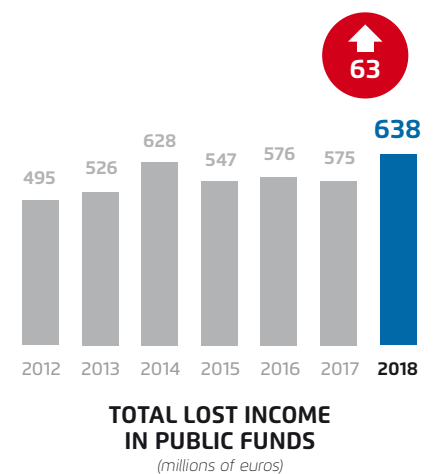
TOTAL LOST INCOME IN PUBLIC FUNDS 219 + 419 = 638 MILLIONS OF EUROS

7 IMPACT OF PIRACY

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

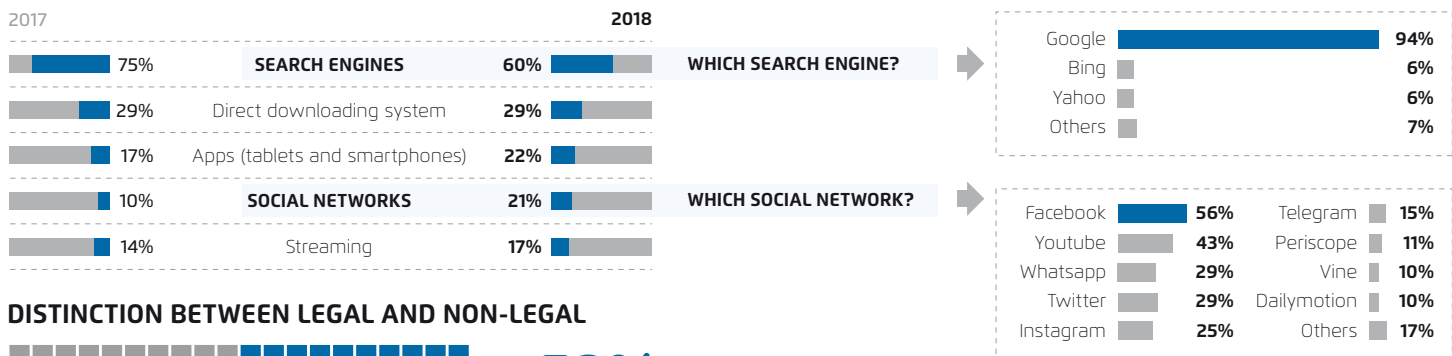


In an scene without piracy the jobs and public funds would be affected positively.

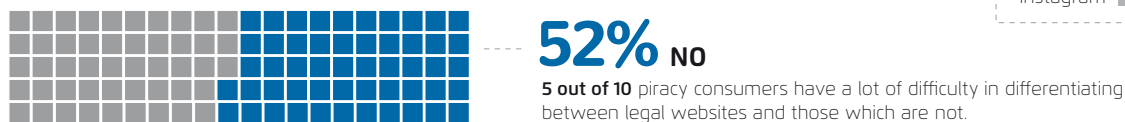


8 HOW DO THEY ACCESS ILLICIT CONTENTS?

6 out of every 10 internet users use search engines to access illicit contents, this way of access decreases while the access through Social Networks and Apps increases.

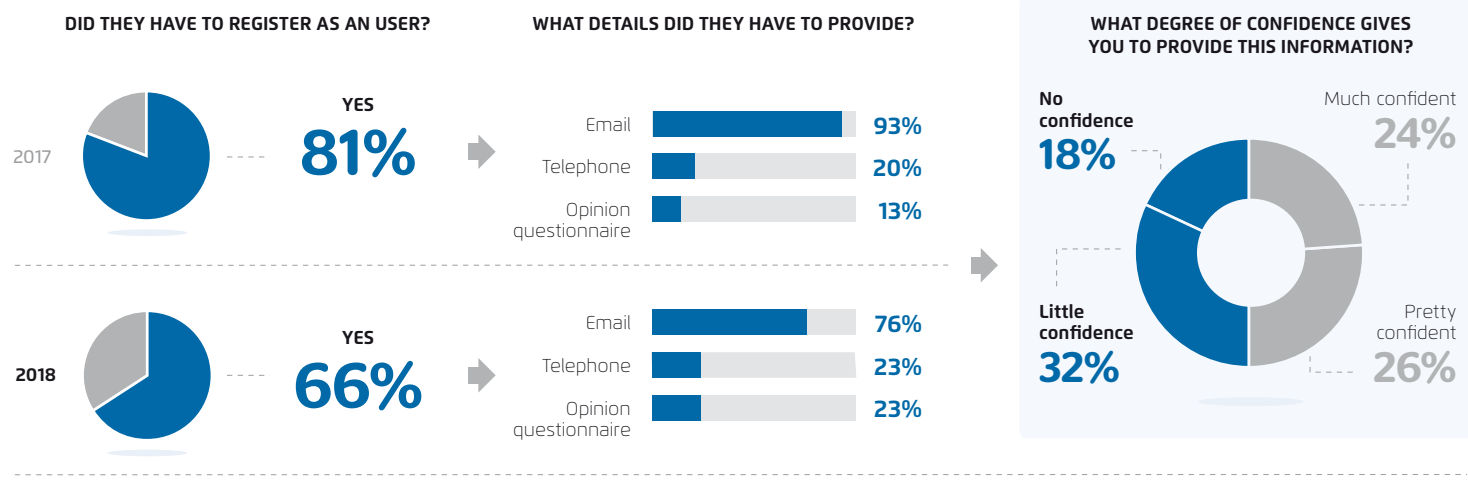


DISTINCTION BETWEEN LEGAL AND NON-LEGAL



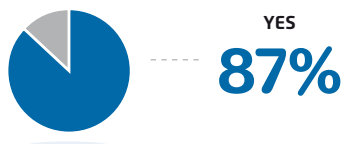
9 SOURCES OF INCOME

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

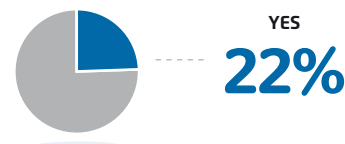


9 out of 10 have been asked to accept cookies.
2 out of 10 have paid for the content they download and 2 out of 10 have filled out a survey for downloading the content.

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



HAS PAID FOR THE CONTENT DOWNLOADED IN THESE PAGES



10 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.

