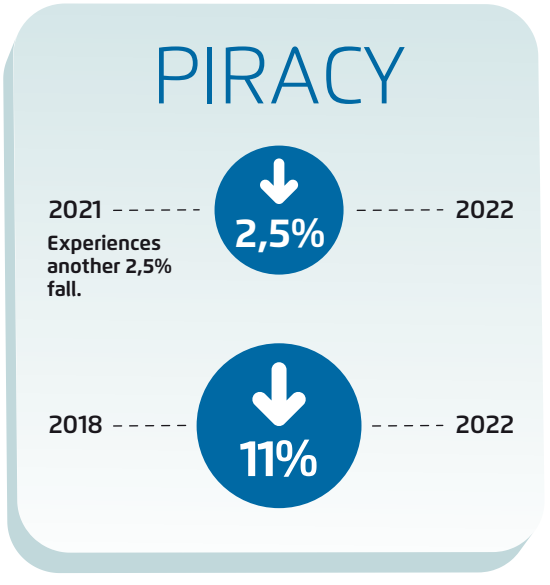


# PIRACY OBSERVATORY 2022 AND DIGITAL CONTENT CONSUMPTION HABITS

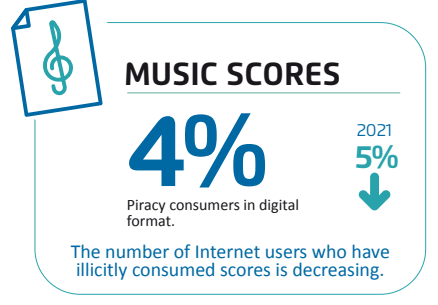
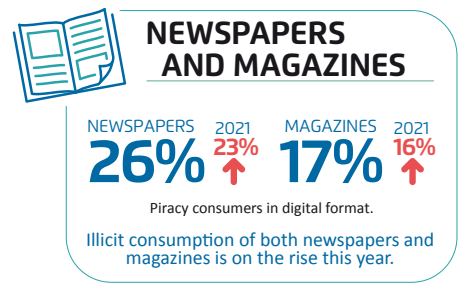
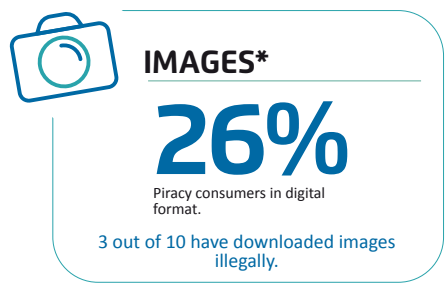
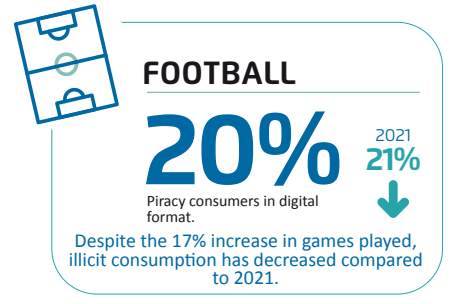
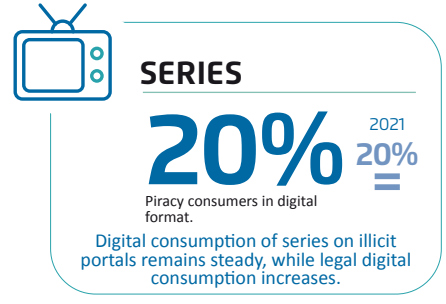
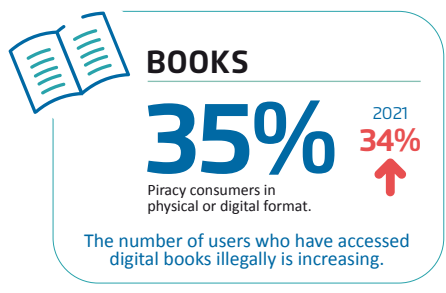
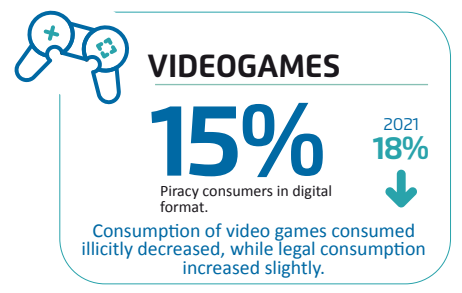
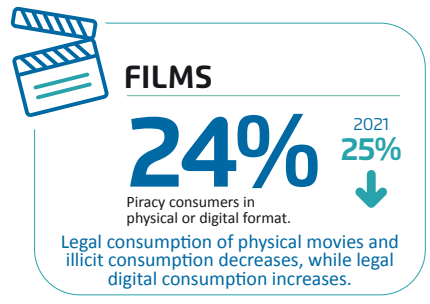
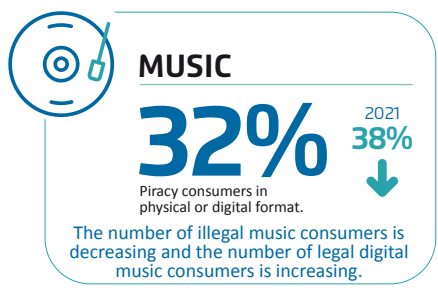
In Spain there is less and less access to illicit content, although piracy continues at high levels, giving an opportunity to the development of the legal offer.

In 2022, the number of illicit content accessed was **5.268** billion, down **2,5%** from 2021 and down around **11%** from 2018.

The loss in 2022 for the industries was **1.995** million euros. The public purse lost **551** million euros and **85.358** direct and indirect jobs could have been created.



## 1 Illicit consumption by sector



\* The figure for consumption of illegal images is an estimate, since this is the first year that they are being measured and they are not consolidated, there may be variations in future measurements.

## 2 Illegal accesses, their value and lost profits due to the effect of piracy

Illegally consumed content decreased in practically all industries, with the exception of Movies and Series, which increased. The value of content increases slightly, due to the rise in the cost of content.

	VOLUMEN Millions of contents	VALUE Millions of euros
MUSIC	-3% 2.351	+2% 10.272
FILMS	+9% 566	+10% 6.072
VIDEOGAMES	-8% 325	8.873
BOOKS	-5% 540	-4% 4.859
FOOTBALL	-3% 85	-3% 246
SERIES	+5% 986	+6% 1.615
NEWSPAPERS	-5% 266	-5% 400
MAGAZINES	-8% 113	-8% 265
SCORES	-7% 36	-13% 456
IMAGES	595	714

**MUSIC**  
Would buy  
**543**  
MILLIONS OF EUROS  
135%  
of increased value

**FILMS + SERIES**  
Would buy  
**387**  
MILLIONS OF EUROS  
20%  
of increased value

**VIDEOGAMES**  
Would buy  
**159**  
MILLIONS OF EUROS  
10%  
of increased value

**FÚTBOL**  
Would buy  
**170**  
MILLIONS OF EUROS  
15%  
of increased value

**BOOKS**  
Would buy  
**217**  
MILLIONS OF EUROS  
8%  
of increased value

**NEWSPAPERS**  
Would buy  
**240**  
MILLIONS OF EUROS  
25%  
of increased value

**MAGAZINES**  
Would buy  
**255**  
MILLIONS OF EUROS  
39%  
of increased value

**SCORES<sup>2</sup>**  
Would buy  
**23**  
MILLIONS OF EUROS  
27%  
of increased value

**IMAGES<sup>1</sup>**  
Would buy  
**43**  
MILLIONS OF EUROS  
14%  
of increased value

Data in millions of euros and percentage (%).

2,5%	<b>TOTAL LOST PROFITS<sup>1</sup></b> <b>1.995</b> Millions of Euros	<b>TOTAL ILLEGAL ACCESSSES</b> <b>5.268</b> Millions	<b>TOTAL VALUE</b> <b>33.056</b> Millions of Euros
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(1) The global data does not include the data on Images, since it is an estimated data being the first year that it is measured and it is not consolidated, and there may be variations in future measurements.  
 (2) The data on scores are qualitative due to the insufficient sample for their calculation.

## 3 Consequences for employment

**CURRENTLY**  
THE COALITION'S MEMBER  
CONTENT INDUSTRIES OPERATE  
IN SPAIN

**103.025**  
DIRECT WORKERS

→

**WITHOUT PIRACY**

**+ 13,8%**

=

**NEW JOBS WOULD BE GENERATED** X6

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

**= 14.226**  
DIRECT JOBS

→

According to the data obtained from the market share that industries are no longer invoicing, more than 85,000 direct and indirect jobs could be generated

**85.358**  
NOT CREATED

## 4 Consequences for public coffers

PIRACY CAUSES THE PUBLIC COFFERS TO LOSE MORE THAN **551 MILLION EUROS** IN VAT, PERSONAL INCOME TAX AND SOCIAL SECURITY CONTRIBUTIONS.

THE PUBLIC COFFERS NO LONGER RECEIVE

+

**370**  
VAT

+

**139**  
SOCIAL SECURITY

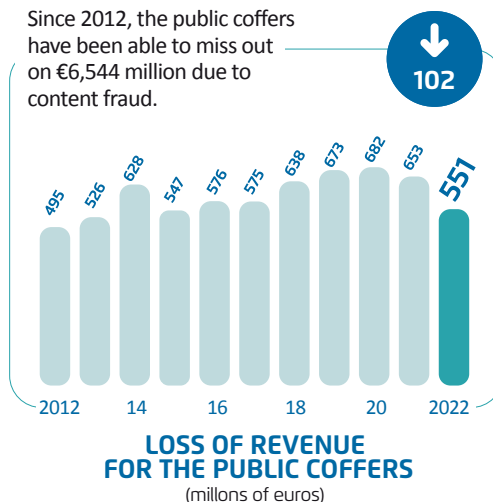
+

**41**  
INCOME TAX

=

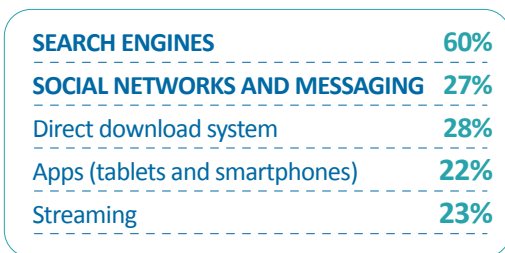
**551**  
MILLIONS OF EUROS

## 5 Evolution of employment, loss of income and taxes



## 6 Access to illegal contents

The main reasons why they access illicit content is to avoid paying for content they may not like and the ease and speed with which they access it.



### WHICH SEARCH ENGINE?



### WHICH SOCIAL NETWORK / MESSAGING / OTHER?

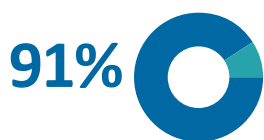


### DO YOU KNOW HOW TO DISTINGUISH BETWEEN LEGAL AND ILLEGAL WEBSITES?



## 7 How are illicit portals financed? Advertising

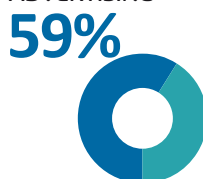
### HAS ACCESSED PORTALS WITH ADVERTISING



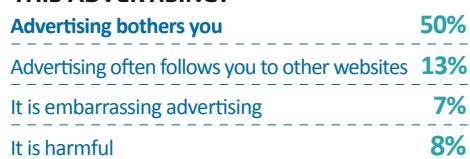
### WHAT TYPE OF ADVERTISING?



### RECEIVE MORE SPAM AND ADVERTISING



### HOW WOULD YOU DESCRIBE THIS ADVERTISING?



## 8 How are illicit portals financed? Method of payment

**20%** paid for the downloaded content



USE CRYPTOCURRENCIES AS A METHOD OF PAYMENT

**33%**  
Often pay for other services with cryptocurrencies

**46%**  
It is safer to pay with cryptocurrencies in this type of portals

## 9 How are illicit portals financed? Obtaining personal data

DO YOU NEED TO SIGN UP AS A REGISTERED USER?

**63%**  
IN MOST / QUITE A FEW PORTALS

WHAT DATA DID YOU HAVE TO PROVIDE FOR REGISTRATION?

**55%** EMAIL  
**21%** QUESTIONNAIRE  
**22%** TELEPHONE

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

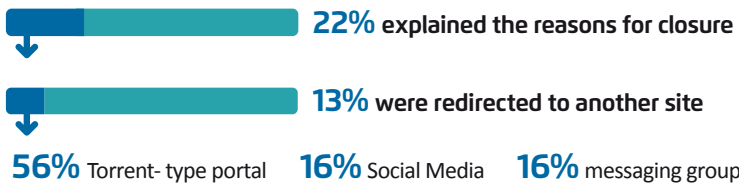
**32%** PRETTY  
**27%** MUCH  
**40%** NONE / LITTLE

HAVE AN IPTV SET-TOP BOX

**18%**

## 10 Content portals

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



## 11 Tutorials for downloading

USED TUTORIALS TO LEARN HOW TO DOWNLOAD  
2 OUT OF 10 USERS HAVE IPTV SET-TOP BOX



## 12 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



## 13 How consumers think they can identify a legal portal

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

The company's contact information is available on the website (address, telephone, etc.)	47%
Well-known payment methods appear with their logos	25%
I am asked to register or I have had to provide my details	24%
A payment must be made on the website and prices and payment methods are shown	19%
There is advertising for well-known brands (Corte Inglés, Iberia, Movistar, BMW ....)	18%
The website appears in the first positions in the search engine	15%
They are in social media or messaging (Facebook, Telegram...)	7%

Half of the users identify the legality of a portal if the company's contact details are available. 25% consider a portal legal if it displays known payment methods with logos and 24% consider legal the one that asks them to register or to which they had to give their data.

## 14 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

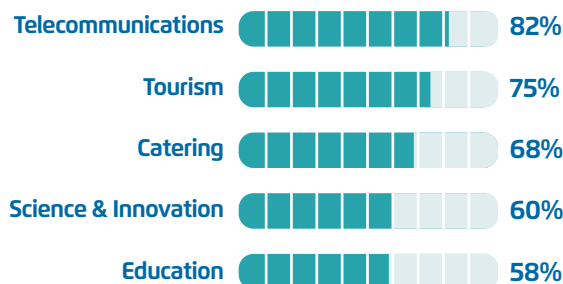


There is a sufficient legal offer of culture and sport in Spain



(Degree of agreement (6-10). Scale 0-10)

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



## 15 Incidents in the downloading of illicit content

WERE UNABLE TO RESOLVE AN ISSUE

65% OF USERS

DID NOT FIND HOW TO DO IT

41%

CONTACTED WITHOUT RESPONSE

14%

11%

35%

FORM WAS NOT WORKING

IT WAS EASY

## 16 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.

Reasons why I would definitely stop consuming free digital content	Card data theft	76%
	Virus	72%
	Benefits for criminal organization	65%
	Sale of data	65%
	Failure to remunerate authors	38%
	Loss of work in the sectors	36%

Main barriers to access to the consumption of free digital contents	Data Fraud	71%
	Virus or malware	68%
	Wide range of legal content	55%
	Respect for content creators	52%
	Lower quality of content	49%
	Lack of trust in illegal content	49%