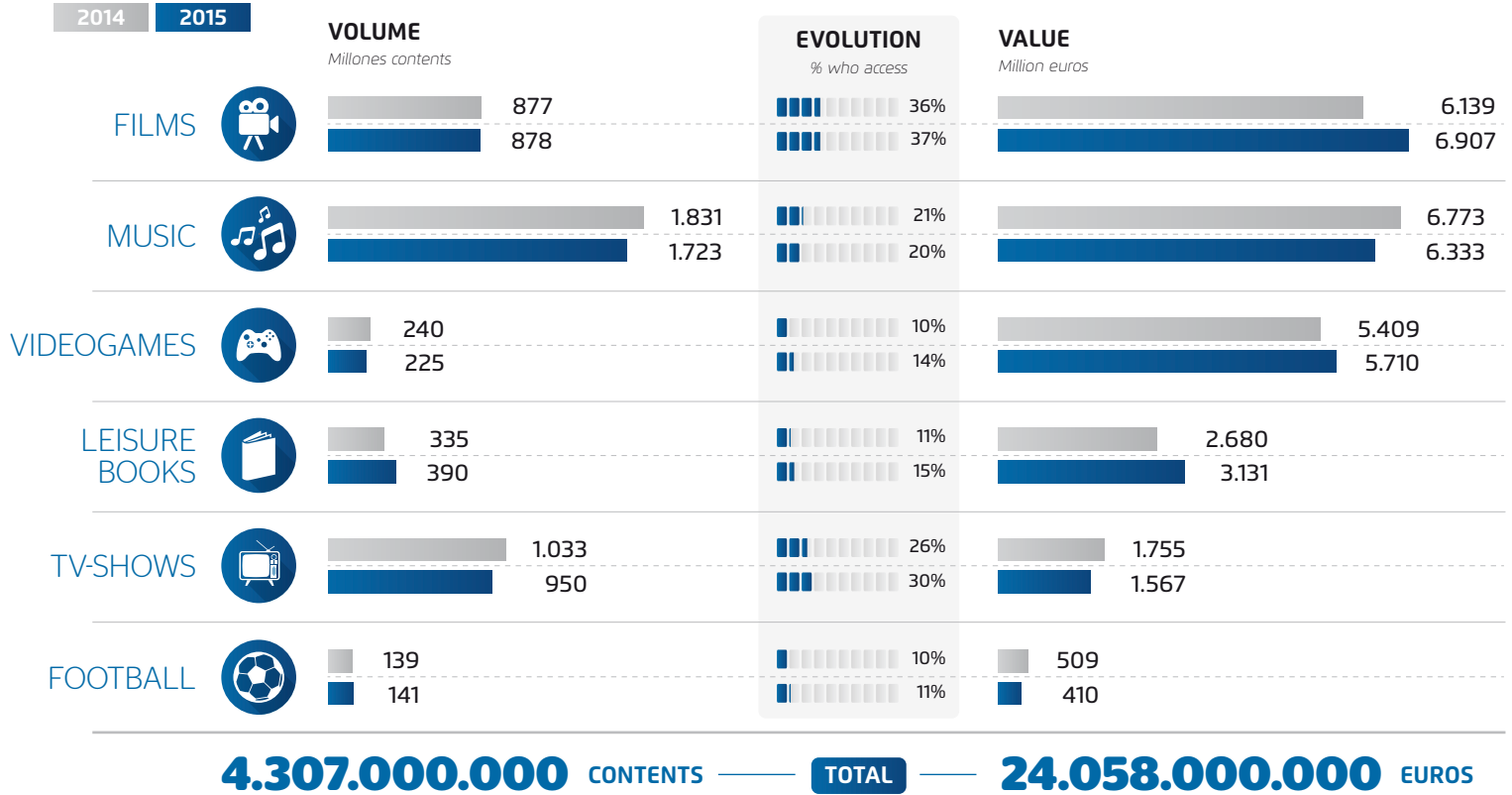


1 DIGITAL ILLEGAL ACCESS

Digital piracy keeps beating records in Spain and causing enormous damages to creators and cultural and digital content industries.



2015 } **1.669 MILLION EUROS = VALUE OF LOSS OF POTENTIAL EARNINGS DUE TO PIRACY**

2 LOSS OF POTENTIAL EARNINGS FOR INDUSTRIES IN SPAIN DUE TO PIRACY

Unit: million euros

FILMS

I would buy physical films: **440**
I would buy films online: **133** } **573**

79% increase industry value | **8%** pirate-legal conversion value

MUSIC

I would buy physical music: **17**
I would buy music online: **385** } **402**

223% increase industry value | **6%** pirate-legal conversion value

VIDEOGAMES

I would buy physical videogames: **196**
I would buy videogames online: **35** } **231**

46% increase industry value | **4%** pirate-legal conversion value

LEISURE BOOKS

I would buy physical books: **81**
I would buy books online: **22** } **103**

11% increase industry value | **3%** pirate-legal conversion value

TV-SHOWS

I would pay for TV-shows } **186**

104% increase industry value | **12%** pirate-legal conversion value

FOOTBALL

I would subscribe to football } **174**

16% increase industry value | **42%** pirate-legal conversion value

3 CONSEQUENCES FOR EMPLOYMENT

A scenario without piracy would allow the creation of 21.672 new direct jobs and around a hundred thousand indirect jobs.



4 PUBLIC FUND CEASE TO RECEIVE...

The public fund failed to receive 547 million euros' incomes in VAT, income taxes and social security due to piracy.

THE PUBLIC FUND FAILED TO RECEIVE 337 + 210 = 547 MILLION EUROS

VAT	Physical	Online	TOTAL
Music	3,6	80,9	84,4
Films	92,4	27,9	120,3
Videogames	41,2	7,4	48,5
Leisure books	3,2	4,6	7,9
TV-shows			39,1
Football			36,5
TOTAL			337

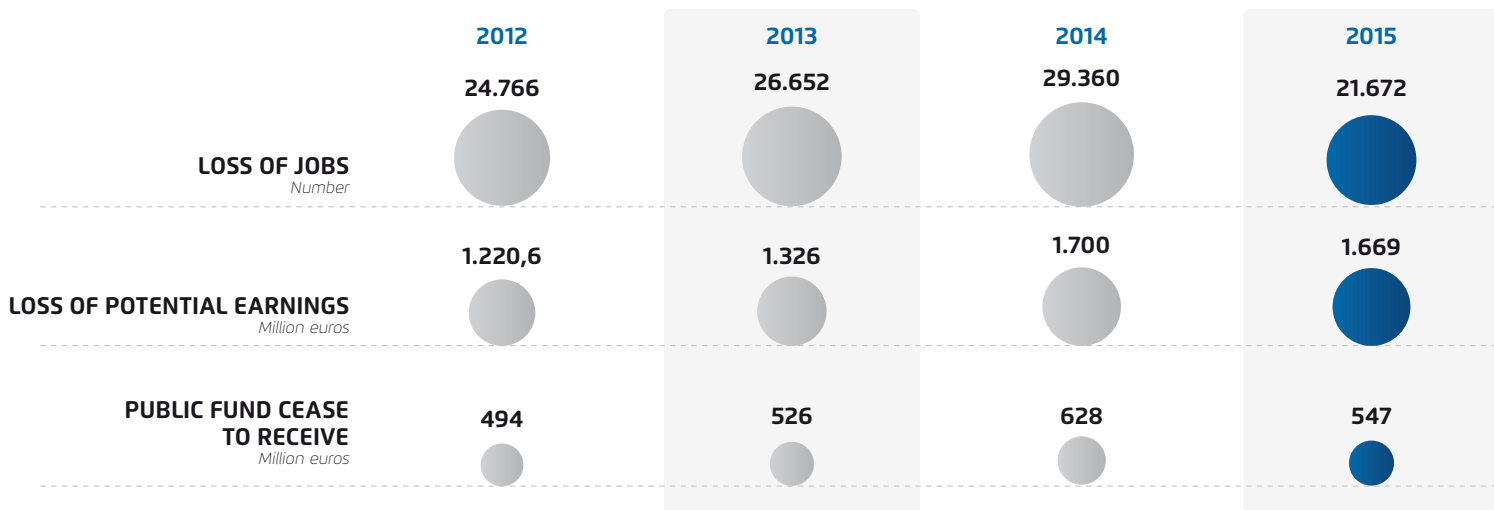
Unit: million euros

(*) Average salary applied on the GfK estimation based on data from the Annual Survey of Salary Structure of the National Institute of Statistics, who conclude an average salary of 22.899,4 and a mode of 15.500

	New jobs	Applied salary*	Applied rate	TOTAL
Social Security	21.672	19.199,7	38,9%	161,86
Income Tax	21.672	19.199,7	11,5%	47,85
TOTAL				210

WITHOUT PIRACY } 21.672 DIRECT JOBS

5 EVOLUTION LOSS OF POTENTIAL EARNINGS AND EMPLOYMENT

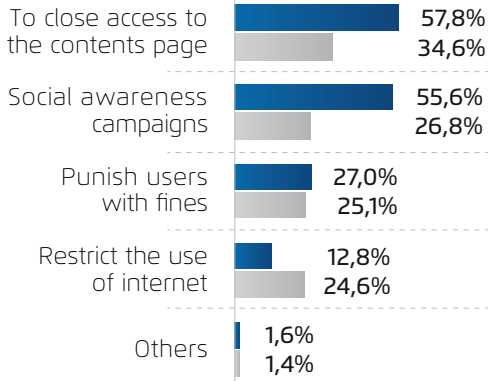


6 MEASURES AGAINST PIRACY IN SPAIN AND OTHER COUNTRIES... AND ITS EFFECTIVENESS

AWARENESS

MEASURES IN SPAIN

MEASURES IN OTHER COUNTRIES



35%

48%

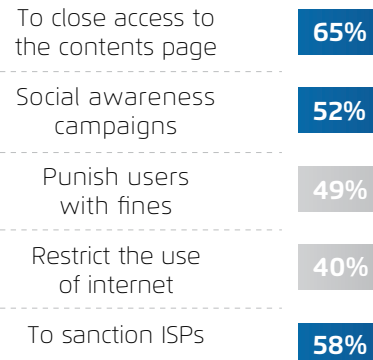
51%

60%

42%

EFFECTIVENESS

MEASURES

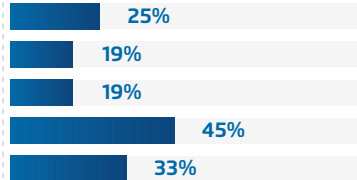


7 SUMMARY MAIN ATTITUDES AND AWARENESS

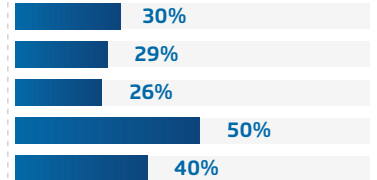
ATTITUDES / PERCEPTION EVOLUTION

Everyone does it
I'm not harming anyone
There are no legal consequences for those who pirate
Watching football this way I am not harming anyone
I access football because everyone does it

2014



2015



CAMPAIGNS AWARENESS

Piracy campaign
Football piracy campaign

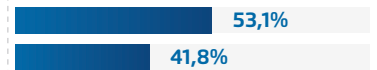
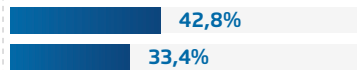


REFORM LPI



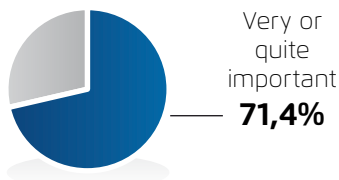
ADVERTISEMENT REMEMBERED

Dating websites
Adult content websites

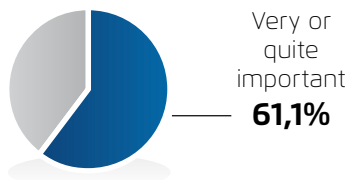


8 BROADBAND ACCESS IMPORTANCE WHEN CONTRACTING AN INTERNET SERVICE

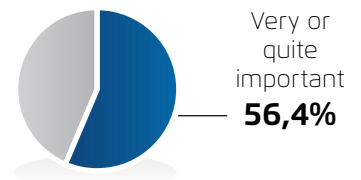
A downloading speed that allows me **to access the contents**



downloading speed because **I need it for working**

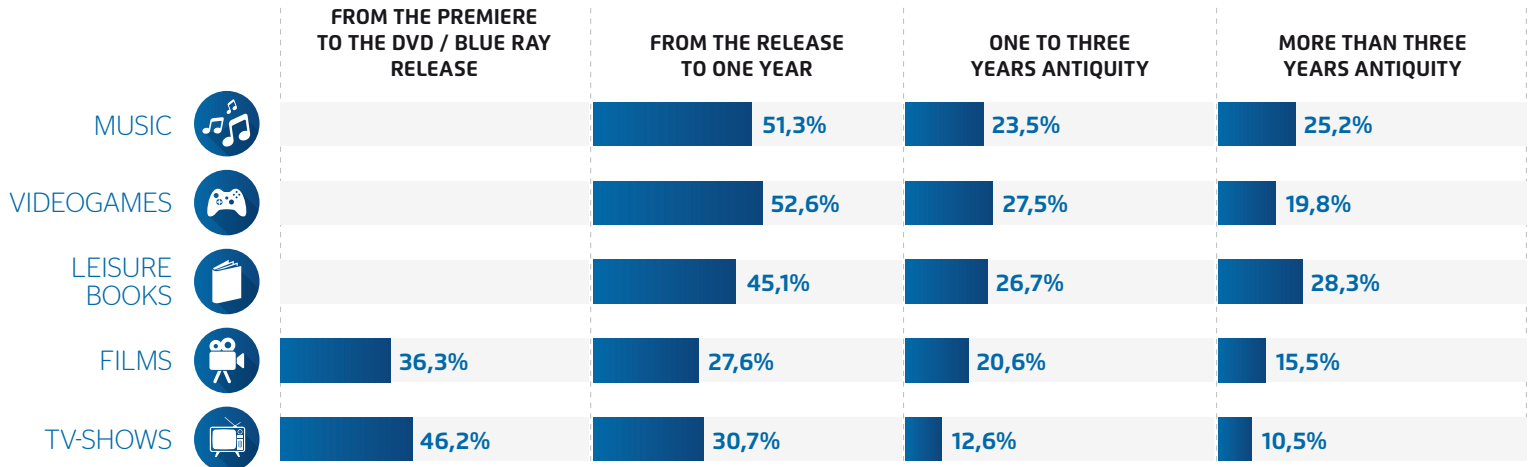


Packaged / Convergent offers that allow me to access several services

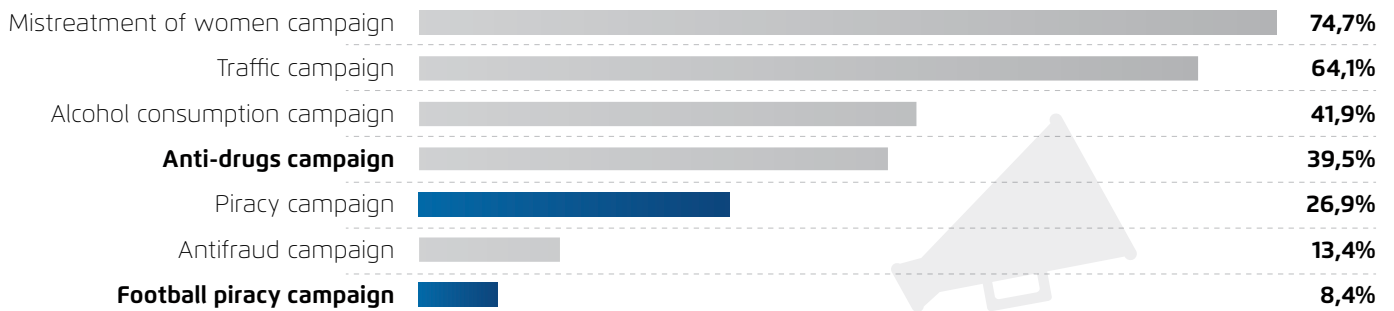


9 ILLEGAL ACCESS ANTIQUITY

Downloaded contents are mostly novelties in all industries. Books are the contents with an antiquity of 1 to 3 years most downloaded.



10 CAMPAIGNS AWARENESS



11 HOW DO PIRATE WEBSITES FINANCE?

