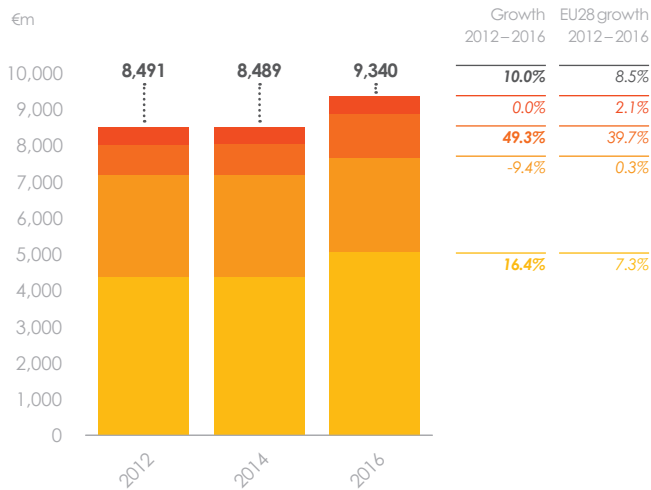


The impact of the internet and digitalization on creative industries in Spain



Increased creative industries revenues and employment

Creative industries revenues



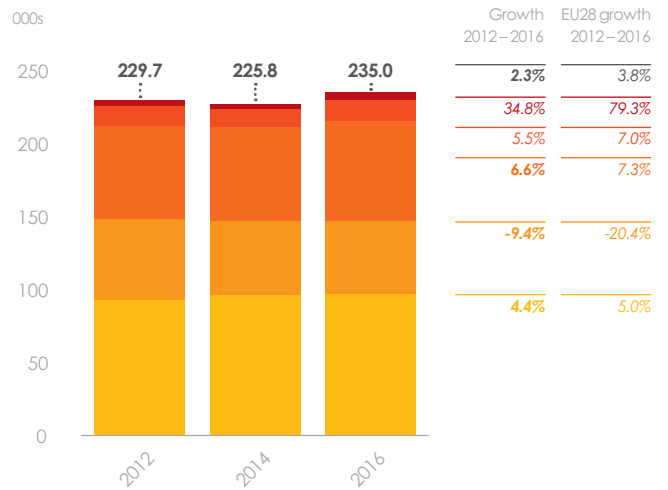
10%

rise in creative industries revenues overall between 2012-2016

Data combines several sources including PwC and IFPI; for full PwC figures see full report: oando.co.uk/latest-thinking

- Music
- Video games
- Book publishing
- TV, video & film

Creative industries employment



2.3%

rise in creative industries employment overall between 2012-2016

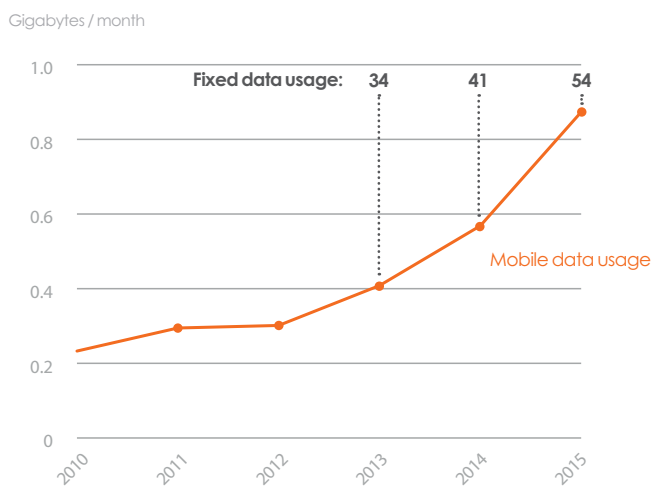
For full sources see full report

oando.co.uk/latest-thinking

- Software publishing
- Music
- TV, video & film
- Publishing*
- Heritage

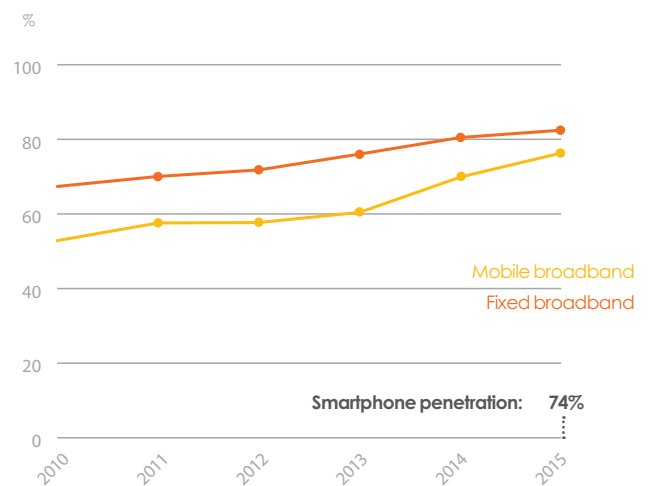
Increased access to creative content

Mobile and fixed data usage per connection



Source: Analysys Mason

Broadband penetration by technology (fixed and mobile)



Source: Analysys Mason, ITU

*Publishing includes books and news; software publishing includes video games publishing; music includes radio.

Reduced production and distribution costs

Digital distribution has almost zero marginal cost

The average print run of a book has decreased from 3,790 in 2010 to 2,810 in 2015 – this is likely due to both increased production efficiency via print-on-demand services, and the popularity of digital formats



Benefits to consumers

A wider variety of services provide greater choice

Between 2015 and 2016 the average number of games per user on Steam rose from 29 to 35



Services such as FilmiN enable fans of independent film to watch niche content for a monthly subscription fee

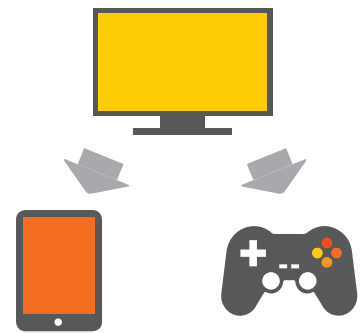
Technological improvements mean that consumers can enjoy content in higher quality formats

Independent testing by P3 suggests that over 90 percent of YouTube HD videos were played without interruption across various locations in Spain



Digital technology helps to celebrate European cultures

The number of linear services targeting other markets in 2003 was 12 – by 2015 this had risen to 47



Benefits to producers

Technology provides creators with brand new creative opportunities

Companies such as iClassics combines classic literature with digital technology and animation to create interactive reading experiences



More creators can enter the market

In 2016 the number of active video games companies registered in Spain grew by 20 percent on the previous year, to 480



Demand for content has increased, supported by increased quality

Music streaming subscription service Tidal is available in Spain and offers high-quality audio in lossless, CD quality, uncompressed sound files

