

Spain

Spain: key data

Population	46.1m
TV households	16.5m
DVD households (penetration)	75.6%
Blu-ray Disc household (penetration)	7.1%
Distributor revenues from video software	€ 87.1m
Comparison with 2011	-12.2%
DVD/Blu-ray Disc split	€ 61.7m / € 25.4m
Video software rental/retail split	7/93
Consumer spending on video software	€ 222.7m
Comparison with 2011	-14.8%
DVD/Blu-ray Disc split	€ 185.1m / € 37.6m
Video software rental/retail split	27/73
Consumer spending on digital video and TV VOD	€ 46.1m
Comparison with 2011	22.3%
Digital video/TVVOD split (%)	31 / 69



Note: There is a variation in 2011 data compared with the previous year. This is due to an internal regularization of UVE members' data in 2012.

DVD and Blu-ray market

In 2012, the Spanish video market as a whole generated a value of EUR 87m, a decrease of 12 per cent compared with 2011. The number of units also dropped by 7 per cent, 884.0 thousand fewer than the previous year.

The Spanish DVD retail market decreased in turnover by 18 per cent or EUR 1.04 million. The number of units shipped decreased by 11 per cent, around 1 million units less than in 2011.

This was the ninth consecutive year that the Spanish rental market decreased in terms of revenues. In 2012, the turnover of DVD rental market dropped by 25 per cent and the number of units shipped decreased by 16 per cent.

In 2012, the total Spanish Blu-ray market generated a value of EUR 23.4 million, an increase of 9 per cent or an increase of EUR 1.9 million compared to 2011. The numbers of units shipped increased by 22 per cent, 495.000 units more were distributed.

The Blu-ray rental market had decreased in terms of revenue by 11 per cent compared with 2011, while the number of units shipped and the number of titles released increased by 13 and 3 per cent respectively.

The Blu-ray retail market increased by 9 per cent compared to 2011. The number of units shipped grew by 22 per cent and the number of new release titles increased by 7 per cent.

Online services

The online distribution market in Spain is still nascent. Market players are finding it difficult to establish themselves in the current economic climate while also facing high levels of illegal content available on the Internet.

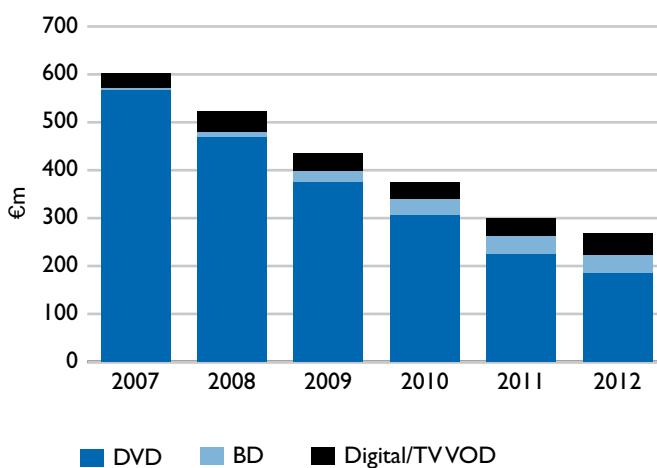
Other relevant developments

The Spanish home entertainment market has been badly affected by piracy and the severe economic situation. At the end of 2011, the implementation of rogue site blocking legislation was approved. The Spanish home entertainment industry works in cooperation with the wider film industry in the application of the new legislation in the fight against piracy on the Spanish market.

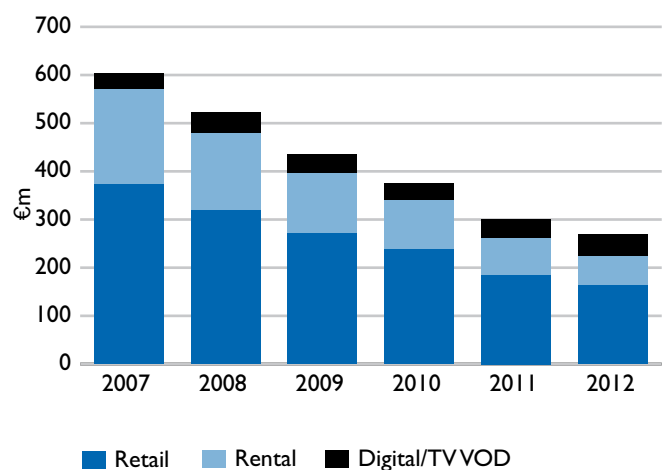
This commentary was provided by UVE, the Spanish Video Association.

Video market: Spain

Consumer spending by format



Consumer spending by sector



		2007	2008	2009	2010	2011	2012	12/11
EXCHANGE RATES								
Exchange rate: \$1=	Euro	0.73	0.68	0.72	0.75	0.72	0.78	
GENERAL								
Population	m	44.1	44.5	44.9	45.3	45.7	46.1	0.9%
Households	m	15.3	15.6	15.9	16.1	16.3	16.5	1.1%
HARDWARE								
TV households	m	15.6	15.8	16.0	16.2	16.4	16.5	0.9%
DVD sector								
DVD Video player/recorder households	m	11.6	12.3	12.1	12.3	12.4	12.5	1.0%
Penetration of TV households	%	74.3	77.8	75.6	75.6	75.6	75.6	
DVD console households	m	4.5	4.2	4.1	4.0	3.8	3.5	-8.8%
Penetration of TV households	%	28.6	26.5	25.6	24.7	23.5	21.2	
BD sector								
BD standalone player households	m	0.002	0.017	0.107	0.270	0.579	1.178	103.5%
Penetration of TV households	%	0.013	0.108	0.671	1.666	3.534	7.125	
PS3 console households	m	0.427	0.792	1.306	1.756	2.213	2.642	19.4%
Penetration of TV households	%	2.7	5.0	8.1	10.8	13.5	16.0	

Total video software market

		2007	2008	2009	2010	2011	2012	12/11
CONSUMER LEVEL ALL VIDEO								
<i>Total market figures include spending on both physical and digital video</i>								
Total spending on all video	Euro m	603.3	522.0	436.0	374.8	299.3	268.9	-10.2%
TRADE LEVEL PHYSICAL VIDEO								
<i>Total market figures include revenues from legacy formats not broken out separately (eg, VHS, HD-DVD, UMD) where relevant.</i>								
Total revenues from video software	Euro m	297.6	249.1	166.2	142.0	99.2	87.1	-12.2%
Total revenues from retail video	Euro m	243.6	210.5	144.0	131.0	91.0	80.9	-11.1%
Total revenues from rental video	Euro m	53.9	38.6	22.2	11.0	8.1	6.1	-24.5%

Video market: Spain

		2007	2008	2009	2010	2011	2012	12/11
CONSUMER LEVEL PHYSICAL VIDEO								
<i>Total market figures include spending on legacy formats not broken out separately (eg, VHS, HD-DVD, UMD) where relevant.</i>								
Total spending on video software	Euro m	571.1	480.2	396.4	339.4	261.5	222.7	-14.8%
Total spending on retail video	Euro m	372.4	318.6	270.3	236.8	184.8	163.7	-11.4%
Total spending on rental video	Euro m	198.7	161.5	126.1	102.6	76.7	59.1	-23.0%

		2007	2008	2009	2010	2011	2012	12/11
CONSUMER LEVEL DIGITAL VIDEO								
<i>The purchase or rental of movies and TV series delivered over the open internet through transactional models (also known as EST, DTO, Internet VOD) or on a subscription basis.</i>								
Total spending on digital video	Euro m	0.1	0.4	0.9	2.1	6.3	14.2	126.0%

		2007	2008	2009	2010	2011	2012	12/11
CONSUMER LEVEL TV VOD								
<i>The delivery of movies and TV content on a transactional (VoD, NVoD/PPV) basis via cable/satellite/IPTV services.</i>								
Total spending on TV VOD	Euro m	32.1	41.5	38.6	33.2	31.5	32.0	1.6%

Retail video market

		2007	2008	2009	2010	2011	2012	12/11
Outlets stocking retail video	no.	7,250	7,250	7,250	7,000	5,740	5,050	
Retail chains with 10 or more outlets	no.	16	16	16	16	13	10	
Kiosks stocking retail video	no.	20,000	20,000	19,000	19,000	15,580	13,710	

Trade level: DVD retail

Revenues from retail DVD	Euro m	237.2	199.6	131.4	108.6	68.2	56.0	-17.9%
Retail DVD units shipped to trade	m	30.4	27.1	21.1	17.6	11.0	9.5	-12.9%
Average trade price	Euro	7.80	7.36	6.24	6.16	6.22	5.86	-5.8%
Number of titles released	no.	4,151	2,343	1,569	948	1,124	1,136	1.1%

Trade level: BD retail

Revenues from retail BD	Euro m	5.646	10.9	12.6	22.4	22.8	24.9	9.3%
Retail BD units shipped to trade	m	0.304	0.7	1.0	1.6	2.4	2.9	22.5%
Average trade price	Euro	18.55	16.59	12.01	14.38	9.58	8.55	-10.7%

Consumer level: DVD retail

Spending on retail DVD	Euro m	367.9	307.2	249.2	204.5	150.0	127.6	-14.9%
Retail DVDs sold to consumers	m	29.8	24.6	19.9	16.0	12.8	10.8	-15.0%
Average consumer price	Euro	12.33	12.48	12.51	12.82	11.76	11.78	0.1%

Consumer level: BD retail

Spending on retail BD	Euro m	3.907	11.1	21.0	32.3	34.8	36.0	3.6%
Retail BDs sold to consumers	m	0.136	0.4	0.9	1.6	2.0	2.2	12.1%
Average consumer price	Euro	28.72	29.13	23.63	20.60	17.37	16.05	-7.6%

Rental video market

		2007	2008	2009	2010	2011	2012	12/11
<i>Rental video market data includes both store-based rental and physical rent-by-mail operations where relevant.</i>								
Video rental outlets	no.	3,700	2,500	2,000	1,500	1,125	1,000	-11.1%
Rental chains with 10 or more outlets	no.	11	11	10	10	9	7	
Trade level: DVD rental								
Revenues from rental DVD	Euro m	53.9	38.6	22.1	10.6	7.6	5.7	-25.4%
Rental DVD units shipped to trade	m	2.0	1.4	0.9	0.5	0.3	0.3	-15.8%
Average trade price	Euro	27.34	26.80	25.24	20.46	21.88	19.38	-11.4%
Number of titles released	no.	547	373	242	212	189	191	1.1%
Trade level: BD rental								
Revenues from rental BD	Euro m		0.02	0.06	0.380	0.532	0.473	-11.0%
Rental BD units shipped to trade	m		0	0	0.018	0.026	0.029	12.9%
Average trade price	Euro		16.59	12.01	21.55	20.39	16.07	-21.2%
Number of titles released	no.				21	63	65	3.2%
Consumer level: DVD rental								
Spending on DVD rental	Euro m	198.7	161.5	126.1	101.5	75.3	57.5	-23.7%
DVD rental transactions	m	85.3	69.1	53.4	42.7	31.5	24.5	-22.2%
Average rental price	Euro	2.33	2.34	2.36	2.38	2.39	2.35	-1.9%
Consumer level: BD rental								
Spending on BD rental	Euro m	0.00	0.00	0.00	1.047	1.434	1.588	10.8%
BD rental transactions	m	0.00	0.00	0.00	0.441	0.600	0.677	12.9%
Average rental price	Euro	2.33	2.34	2.36	2.38	2.39	2.35	-1.9%

Source: IHS/IIVF/IUVE

Population and household figures: IHS Global Insight

Note: Distributor level excludes and consumer level includes VAT/sales tax.