

Spain

Spain: key data

Population	46.5m
TV households	16.7m
DVD Video player/recorder penetration	76.3%
Blu-ray Disc player/recorders penetration	11.5%
Consumer spending on physical video software	€ 180.7m
Comparison with 2012	-19.6%
DVD/ Blu-ray Disc split	€ 144.3m / € 36.4m
Video software rental/retail split (%)	23 / 77
Consumer spending on digital video and TV VOD	€ 44.1m
Comparison with 2012	27.2%
TVVOD/ Digital video split (%)	39 / 61



DVD and Blu-ray market

In 2013, the Spanish total video market generated a value of EUR 62 million, a decrease of 23 per cent or EUR 18.6 million compared with the previous year.

The DVD retail market decreased in turnover by 22 per cent or EUR 11 million.

This was the tenth consecutive year that the Spanish rental market decreased in terms of revenues. In 2013, the turnover of the DVD rental market dropped by 46 per cent. The number of units shipped and the number of new titles released also decreased by 32 and 7 per cent respectively.

In 2013, the Blu-ray retail market decreased by 20 per cent or EUR 4.6 million in terms of revenues compared to the previous year. The number of units shipped also dropped by 9 per cent while the number of new titles released grew by 9 per cent.

The Blu-ray rental market increased in terms of revenue by 34 per cent compared with 2012. The number of units shipped also increased by 7 per cent while the number of new titles released dropped by 20 per cent.

The total Blu-ray market decreased by 19 per cent or 4.4 million in terms of income compared with the previous year.

Online distribution

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

Other relevant developments

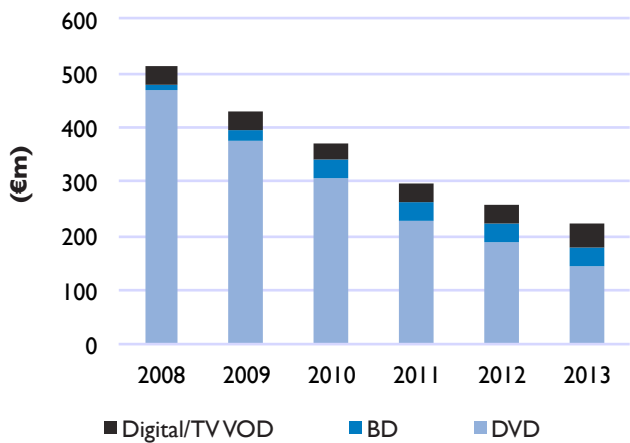
The Spanish home entertainment market has been badly effected by piracy and the severe economic situation, including a significant unemployment rate.

The Spanish Government, aware of the current serious intellectual property situation, has fostered several legislative reforms to be passed in 2014. A law on site blocking has been implemented, but the site blocking Commission is taking a cautious approach in order to avoid controversy by ordering the blocking of access to a site which is not predominantly infringing copyright. The current efforts to reduce online piracy are considered ineffective and despite right holders' persistent ongoing enforcement activities, including 34 pending criminal cases audiovisual piracy continues to expand and evolve in the online environment, as well as in the streets.

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

Video market: Spain

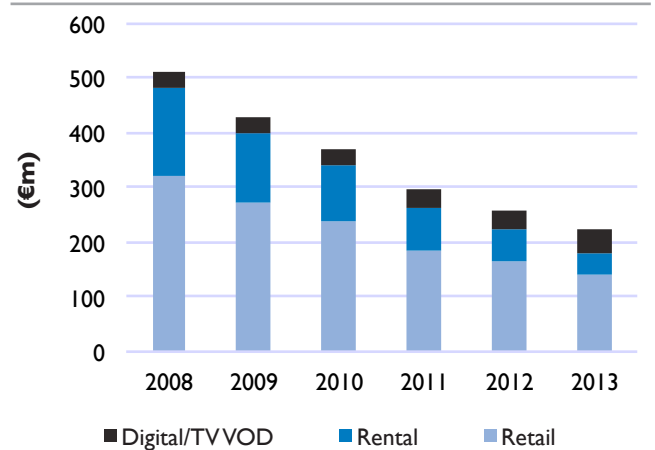
Consumer spending by format



Source: IHS/IVF/UVE

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Consumer spending by sector



Source: IHS/IVF/UVE

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		2008	2009	2010	2011	2012	2013	12/13
EXCHANGE RATES								
Exchange rate: \$1 =	Euro	0.68	0.72	0.75	0.72	0.78	0.75	
GENERAL								
Population	m	44.5	44.9	45.3	45.7	46.1	46.5	0.8%
Households	m	15.6	15.9	16.1	16.3	16.5	16.7	1.1%
HARDWARE								
TV households	m	15.8	16.0	16.2	16.4	16.5	16.7	0.9%
DVD sector								
DVD Video player/recorder households	m	12.3	12.3	12.4	12.5	12.6	12.7	0.8%
Penetration of TV households	%	77.8	76.6	76.5	76.4	76.3	76.3	0.0%
DVD console households	m	4.2	4.1	4.0	3.8	3.5	3.0	-13.2%
Penetration of TV households	%	26.5	25.6	24.7	23.5	21.1	18.1	-13.9%
BD sector								
BD standalone player households	m	0.02	0.11	0.27	0.58	1.18	1.92	63.4%
Penetration of TV households	%	0.1	0.7	1.7	3.5	7.1	11.5	62.0%
PS3 console households	m	0.8	1.3	1.8	2.2	2.6	3.1	18.5%
Penetration of TV households	%	5.0	8.1	10.8	13.5	16.0	18.8	17.4%

Total video software market

		2008	2009	2010	2011	2012	2013	12/13
CONSUMER LEVEL ALL VIDEO								
<i>Total market figures include spending on both physical and digital video</i>								
Total spending on video	Euro m	512.3	428.5	368.8	295.1	259.4	224.8	-13.3%

Video market: Spain

		2008	2009	2010	2011	2012	2013	12/13
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	480.2	396.4	339.5	261.6	224.7	180.7	-19.6%
Total spending on retail video	Euro m	318.6	270.3	236.8	184.8	163.7	139.6	-14.7%
Total spending on rental video	Euro m	161.5	126.1	102.6	76.8	61.1	41.1	-32.7%

		2008	2009	2010	2011	2012	2013	12/13
<i>Owing to a definitional change, digital video and TVVOD numbers may differ from those published in the 2012 IVF Yearbook.</i>								

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	0.4	0.9	2.1	6.3	14.1	27.0	91.9%

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 TVVOD	Euro m	31.7	31.1	27.2	27.2	20.6	17.1	-17.0%

Retail video market

		2008	2009	2010	2011	2012	2013	12/13
Outlets stocking retail video	no.	7,250	7,250	7,000	5,740	5,050		
Retail chains with 10 or more outlets	no.	16	16	16	13	10		
Kiosks stocking retail video	no.	20,000	19,000	19,000	15,580	13,710		

Consumer level: DVD retail								
Spending on retail DVD	Euro m	307.2	249.2	204.5	150.0	127.6	105.8	-17.1%
Retail DVDs sold to consumers	m	24.6	19.9	16.0	12.8	10.8	8.7	-20.0%
Average consumer price	Euro	12.48	12.51	12.82	11.76	11.78	12.20	3.6%

Consumer level: BD retail								
Spending on retail BD	Euro m	11.1	21.0	32.3	34.8	36.0	33.8	-6.2%
Retail BDs sold to consumers	m	0.4	0.9	1.6	2.0	2.2	2.4	6.0%
Average consumer price	Euro	29.13	23.63	20.60	17.37	16.05	14.20	-11.5%

Rental video market

		2008	2009	2010	2011	2012	2013	12/13
<i>Rental video market data includes both store-based rental and physical rent-by-mail operations where relevant.</i>								
Video rental outlets	no.	2,500	2,000	1,500	1,125	1,000	900	
Rental chains with 10 or more outlets	no.	11	10	10	9	7		

Consumer level: DVD rental								
Spending on DVD rental	Euro m	161.5	126.1	101.6	75.3	59.4	38.5	-35.2%
DVD rental transactions	m	69.1	53.4	42.7	31.5	24.5	16.6	-32.3%
Average rental price	Euro	2.34	2.36	2.38	2.39	2.42	2.32	-4.3%

Consumer level: BD rental								
Spending on BD rental	Euro m	0.0	0.0	1.0	1.4	1.6	2.6	56.8%
BD rental transactions	m	0.0	0.0	0.4	0.6	0.7	0.9	36.5%
Average rental price	Euro	2.34	2.36	2.38	2.39	2.42	2.78	14.8%

Source: IHS/IVF/IUVE

Population and household figures: IHS Global Insight

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

Note: Consumer level digital video and TVVOD figures may differ from locally published figures due to the application of different definitions.