

Spain

Spain: key data 2023

Population (m)	46.7		
TV households (m)	19.1		
Consumer spending on total video (€m)	1,772.3	Consumer spending on total video (€m) - Total Europe	26,435.1
Comparison with 2022	11.3%	Comparison with 2022	12.1%
Consumer spending on digital video and TV VoD (€m)	1,722.6	Consumer spending on digital video and TV VoD (€m) - Total Europe	25,419.9
Comparison with 2022	11.9%	Comparison with 2022	13.4%
Consumer spending on physical video software (€m)	49.7	Consumer spending on physical video software (€m) - Total Europe	1,015.2
Comparison with 2022	-6.5%	Comparison with 2022	-12.9%

Spain key commentary

In 2023, the total Spanish video market (digital and physical) grew by 11.5%, resulting in total consumer spending of EUR 1,8 billion on all video content distributed through various online models and on physical carriers.

As expected, the market for physical discs experienced a decline of 6.5% in value compared to 2022, finishing the year with EUR 49.7 million worth of final total consumer spending on physical carries in Spain 2023.

Digital consumption (digital video transactions (sell-through and rental) and TV VOD) reached total consumer spending of EUR 1,7 billion, showing growth of 12.1% compared with 2022. This development goes some way towards balancing the decline in the market performance of the physical formats.

Other relevant developments

Various initiatives have been launched to help Spanish consumers find legal services providing access to film and TV content, e.g. the online portal “Me siento de cine”, which has the support of the local film and AV industry as well as of the Spanish government.

Since March 2018, “La Pantalla Digital” - an online platform where Spanish audiences can search for legal offers for film, TV, sport events and music – has contributed to facilitating discoverability of legal content and services. This initiative is supported by the Spanish Ministry of Education, Culture and Sport and also included in the Agorateka, the EU online legal content portal hosted by the EUIPO.

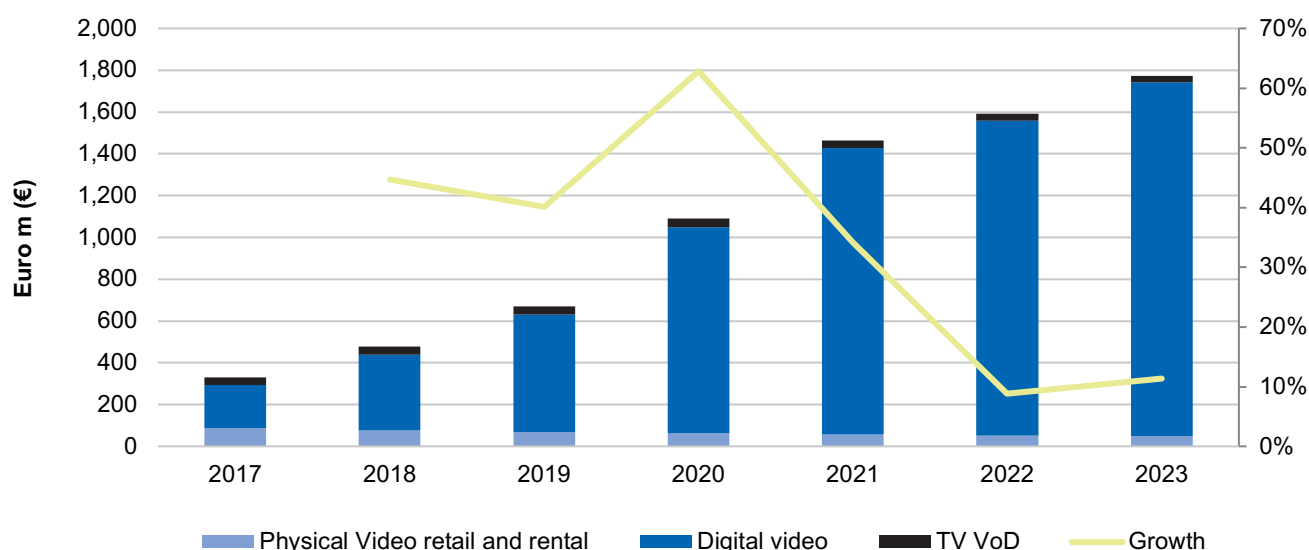
JustWatch Spain is an additional commercial search engine for Spanish audiences to identify providers of authorized access to films and TV programmes in Spain.

This commentary was provided by the International Video Federation.

Video market: Spain

	2017	2018	2019	2020	2021	2022	2023	22/23
GENERAL								
Population (m)	46.6	46.7	46.7	46.8	46.7	46.7	46.7	-0.1%
TV households (m)	18.4	18.4	18.6	18.7	18.9	19.0	19.1	0.6%
Population Total Europe (m)	632.8	634.4	635.7	636.7	637.3	637.7	637.8	0.0%
TV households Total Europe (m)	262.1	263.8	265.7	267.6	269.2	270.7	272.2	0.5%
Broadband households (m)	11.5	11.8	12.1	12.5	12.9	13.1	13.3	1.5%
Nominal GDP (EUR m)	1,161.9	1,204.2	1,244.8	1,114.7	1,181.5	1,255.7	1,311.8	4.5%
Consumer price index (100 in 2010)	103.3	110.1	105.2	106.2	108.4	109.9	114.7	4.4%
DVD Video player/recorder penetration (%)	70.7	69.7	68.3	67.0	65.6	64.3	63.0	-2.0%
Blu-ray Disc player/recorders penetration (%)	15.9	16.0	15.7	15.2	14.7	14.1	13.6	-3.6%
DVD Video player/recorder Total Europe (%)	64.4	61.7	59.2	56.9	54.7	52.7	50.8	-3.6%
Blu-ray Disc player/recorders penetration Total Europe (%)	22.3	22.3	21.7	21.0	20.2	19.4	18.7	-3.7%
OTT Subscriptions (m)	2.9	4.8	7.8	15.5	19.8	23.0	25.2	9.5%

Consumer spending by segment



Total video software market

	2017	2018	2019	2020	2021	2022	2023	22/23
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CONSUMER LEVEL ALL VIDEO

Total market figures include consumption of both physical and digital video

Total spending on video (EUR m)	330.2	477.9	669.7	1,090.6	1,463.2	1,592.0	1,772.3	11.3%
Growth (%)		44.7%	40.1%	62.9%	34.2%	8.8%	11.3%	
Total spending on video Total Europe (EUR m)	9,632.5	11,109.4	13,467.8	17,634.9	21,442.7	23,589.9	26,435.1	12.1%

CONSUMER LEVEL DIGITAL VIDEO (OTT) – TOTAL SPENDING

The purchase or rental of films and TV series delivered over the open internet. Digital retail numbers include purchase on content on pay TV set-top-boxes where applicable. This category specifically excludes sports, live events and adult content to ensure it is comparable to physical video data.

Retail digital video (EUR m)	13.4	14.0	14.2	15.3	14.8	15.0	15.2	1.3%
Rental digital video (EUR m)	18.2	19.1	19.9	24.6	32.5	22.9	23.5	2.3%
Subscription digital video (EUR m)	174.8	329.1	530.2	947.8	1,322.0	1,468.2	1,652.9	12.6%
Total digital video (EUR m)	206.4	362.1	564.3	987.7	1,369.3	1,506.1	1,691.6	12.3%
Total digital video Total Europe (EUR m)	5,241.8	7,357.8	10,111.7	14,741.7	19,007.4	21,355.7	24,389.6	14.2%

CONSUMER LEVEL PAY TV TRANSACTIONAL VOD – TOTAL SPENDING

The rental of film and TV content on a transactional (VoD, NVoD/PPV) basis via cable/satellite/IPTV services, only on set-top-boxes. This category specifically excludes sports, live events and adult content to ensure it is comparable to physical video data.

Pay TV TVOD (EUR m)	37.1	39.4	37.6	40.5	36.2	32.7	31.0	-5.3%
Pay TV TVOD Total Europe (EUR m)	881.1	943.4	1,021.6	1,107.1	1,068.6	1,069.0	1,030.3	-3.6%

CONSUMER LEVEL PHYSICAL VIDEO – TOTAL SPENDING

Total market figures include consumption of legacy formats not broken out separately (eg, VHS, HD-DVD, UMD) where relevant.

Physical video rental (EUR m)	2.7	1.7	1.4	1.1	0.8	0.7	0.5	-18.7%
Physical video rental Total Europe (EUR m)	214.6	144.8	109.5	66.9	43.3	30.1	21.8	-27.6%
Physical video retail (EUR m)	84.1	74.6	66.4	61.2	56.8	52.5	49.2	-6.4%
Physical video retail Total Europe (EUR m)	3,295.0	2,663.4	2,225.0	1,719.2	1,323.4	1,135.0	993.4	-12.5%
Physical video software (EUR m)	86.8	76.3	67.8	62.3	57.7	53.2	49.7	-6.5%
Physical video software Total Europe (EUR m)	3,509.7	2,808.2	2,334.5	1,786.1	1,366.7	1,165.1	1,015.2	-12.9%

Notes: 1) Consumer level digital video (OTT) and pay TV transactional VOD figures may differ from locally published figures due to the application of different definitions. 2) Historical numbers in this section may differ from those published in previous years owing to changes in Omdia methodology, updated data sources and other data restatements. 3) The current online figures are a snapshot of the market in June 2024. Figures are updated regularly and so it may not be possible to compare directly to figures published after this date. 4) Total Europe include Austria, Belgium, Denmark, Finland, France, Germany, Greece, Iceland, Ireland, Italy, Netherlands, Norway, Portugal, Spain, Sweden, Switzerland, UK, Croatia, Czech Republic, Hungary, Poland, Russia, and Slovakia 5) OTT Subscriptions are subscriptions to online channels and virtual pay TV operators. Figures exclude multiscreen services of pay TV operators.

Key players in the market (in alphabetical order)

Physical + Digital

20th Century Fox Home Entertainment España

Aurum

Cameo

Divisa Red

Karma Films

Sony Pictures Entertainment Iberia

Physical + Digital

Tri Pictures

Versus Entertainment

Walt Disney Studios Home entertainment

Warner Bros Entertainment España

Share of European market 2023



Digital video (OTT)

6.9%



Pay TV TVOD

3.0%



Physical retail

4.9%



Physical rental

2.5%

Average home entertainment spending



Spending per TV household (EURO)

€92.8



Spending per broadband household (EURO)

€133.1



Digital share of spend vs. broadband speed



Share digital spend



95%

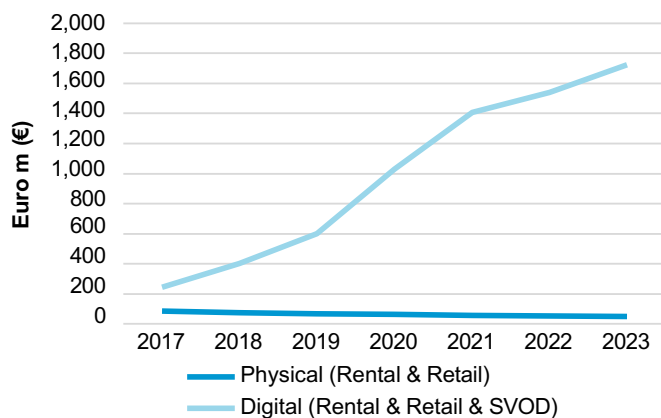
Broadband subscriptions speed rank

(ranked across the 9 IVF countries)*

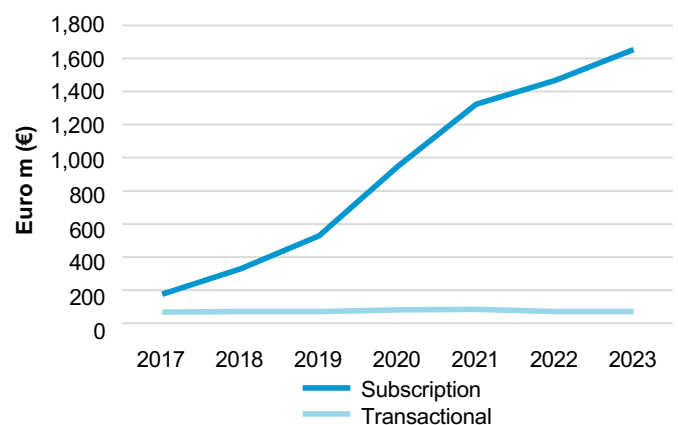


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Comparison Physical vs Digital



Comparison Subscription vs Transactional



Note: Digital (Rental & Retail) includes SVOD data; Transactional excludes physical.

*Countries are ranked based on the proportion of broadband subscriptions receiving fixed data at speed over 30Mbps.