

Spain

Spain key data 2022

Population (m)	46.7		
TV households (m)	19.0		
Consumer spending on total video (€m)	1,628.1	Consumer spending on total video (€m) - Total Europe	23,276.4
Comparison with 2021	13.7%	Comparison with 2021	9.4%
Consumer spending on digital video and TV VoD (€m)	1,574.9	Consumer spending on digital video and TV VoD (€m) - Total Europe	22,110.8
Comparison with 2021	14.6%	Comparison with 2021	11.1%
Consumer spending on physical video software (€m)	53.2	Consumer spending on physical video software (€m) - Total Europe	1,165.6
Comparison with 2021	-7.8%	Comparison with 2021	-14.7%

Spain key commentary

Physical market

In 2022, the Spanish physical home entertainment market continued to contract, closing with consumer spending at EUR 53.2 million – a decrease of 7.8% compared to 2021.

Online distribution

The uptake of the Spanish online distribution market has been slow during the past couple of years, among other due to significant levels of digital piracy. A stronger approach to enforcement and legislative reforms, however, has had a positive effect on the market and has contributed to increases of the subscription-based distribution models and pay-TV segments.

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.

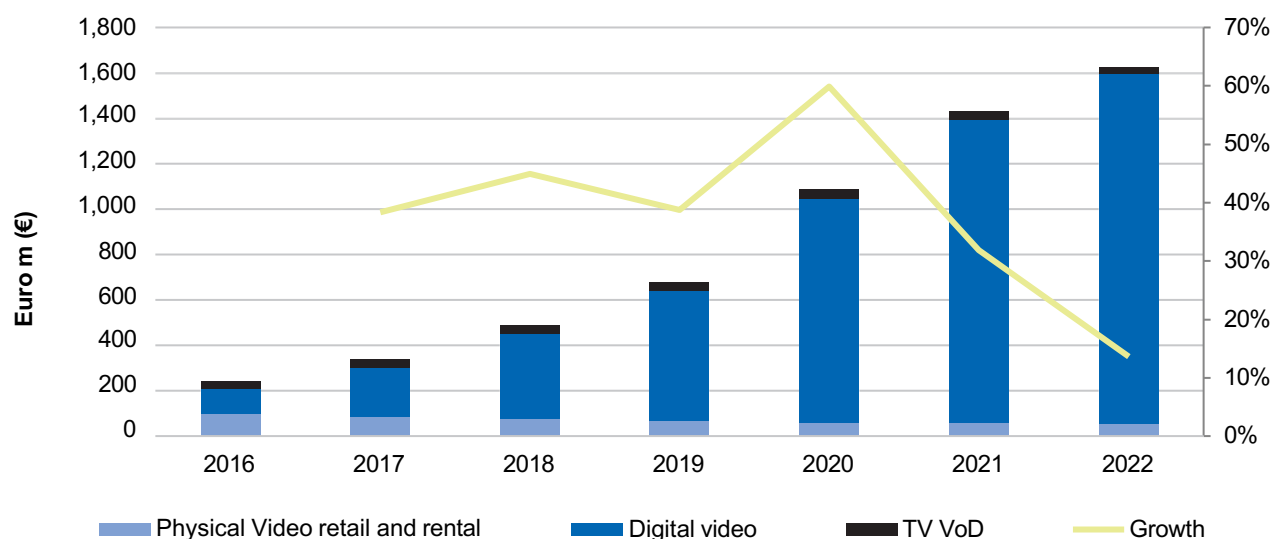
JustWatch Spain is an additional commercial search engine for Spanish audiences to identify providers of authorized access to films and TV programmes in Spain.

This commentary was provided by the International Video Federation.

Video market: Spain

	2016	2017	2018	2019	2020	2021	2022	21/22
GENERAL								
Population (m)	46.6	46.6	46.7	46.7	46.8	46.7	46.7	-0.1%
TV households (m)	18.3	18.4	18.4	18.6	18.7	18.9	19.0	0.7%
Population Total Europe (m)	631.1	632.8	634.4	635.7	636.7	637.3	637.7	0.1%
TV households Total Europe (m)	260.2	262.1	263.8	265.7	267.6	269.2	270.7	0.6%
Broadband households (m)	11.0	11.5	11.8	12.1	12.5	12.9	13.1	1.5%
Nominal GDP (EUR m)	1,113.8	1,161.9	1,204.2	1,244.8	1,114.7	1,181.5	1,255.7	6.3%
Consumer price index (100 in 2010)	99.4	103.3	110.1	105.2	106.2	108.4	109.9	1.4%
DVD Video player/recorder penetration (%)	71.8	70.7	69.7	68.3	67.0	65.6	64.3	-2.0%
Blu-ray Disc player/recorders penetration (%)	15.5	15.9	16.0	15.7	15.2	14.7	14.1	-3.9%
DVD Video player/recorder Total Europe (%)	67.0	64.4	61.7	59.2	56.9	54.7	52.7	-3.7%
Blu-ray Disc player/recorders penetration Total Europe (%)	21.8	22.3	22.3	21.7	21.0	20.2	19.4	-3.9%
OTT Subscriptions (m)	1.2	2.9	4.5	7.1	12.4	15.6	17.2	10.4%

Consumer spending by segment



Total video software market

	2016	2017	2018	2019	2020	2021	2022	21/22
CONSUMER LEVEL ALL VIDEO								
<i>Total market figures include consumption of both physical and digital video</i>								
Total spending on video (EUR m)	244.3	337.9	489.8	679.4	1,086.5	1,432.5	1,628.1	13.7%
Growth (%)		38.3%	44.9%	38.7%	59.9%	31.8%	13.7%	
Total spending on video Total Europe (EUR m)	9,204.5	9,924.5	11,389.9	13,601.0	17,690.1	21,274.6	23,276.4	9.4%

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)	12.9	13.4	14.0	14.2	15.3	14.8	15.2	2.2%
Rental digital video (EUR m)	17.3	18.2	19.1	19.9	24.6	32.5	23.2	-28.7%
Subscription digital video (EUR m)	81.4	182.5	341.0	540.0	943.7	1,291.3	1,503.9	16.5%
Total digital video (EUR m)	111.6	214.1	374.0	574.1	983.7	1,338.6	1,542.2	15.2%
Total digital video Total Europe (EUR m)	4,068.6	5,387.4	7,505.6	10,135.9	14,705.6	18,771.8	21,019.0	12.0%

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)	34.5	37.1	39.4	37.6	40.6	36.2	32.7	-9.7%
Pay TV TVOD Total Europe (EUR m)	947.5	1,027.4	1,076.1	1,130.6	1,198.4	1,136.1	1,091.8	-3.9%

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)	4.6	2.7	1.7	1.4	1.1	0.8	0.7	-20.4%
Physical video rental Total Europe (EUR m)	295.4	214.6	144.8	109.5	66.9	43.3	30.6	-29.5%
Physical video retail (EUR m)	93.6	84.1	74.6	66.4	61.2	56.8	52.5	-7.6%
Physical video retail Total Europe (EUR m)	3,892.9	3,295.0	2,663.4	2,225.0	1,719.2	1,323.4	1,135.0	-14.2%
Physical video software (EUR m)	98.1	86.8	76.3	67.8	62.3	57.7	53.2	-7.8%
Physical video software Total Europe (EUR m)	4,188.3	3,509.7	2,808.2	2,334.5	1,786.1	1,366.7	1,165.6	-14.7%

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 2023. 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 2022



Digital video (OTT)

7.3%



Pay TV TVOD

3.0%



Physical retail

2.2%



Physical rental

4.6%

Average home entertainment spending



Spending per TV household (EURO)

€85.8

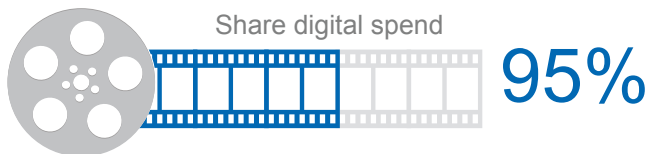


Spending per broadband household (EURO)

€124.2



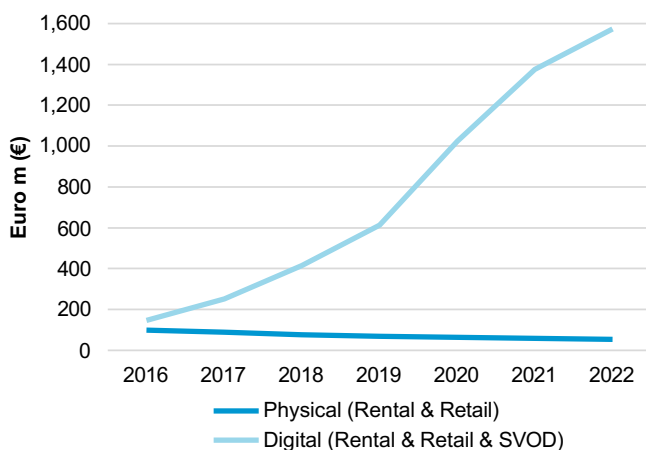
Digital share of spend vs. broadband speed



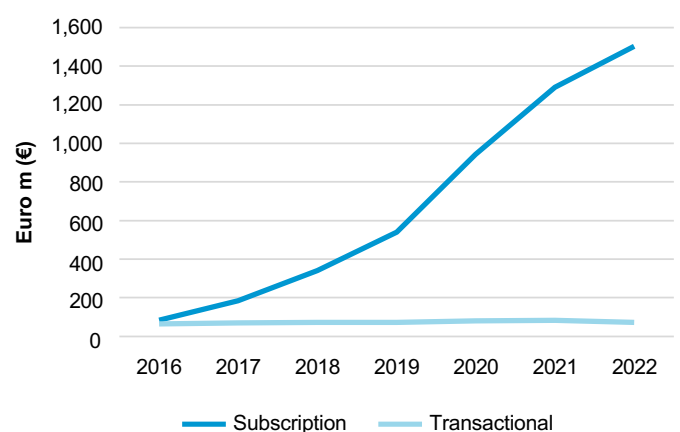
Broadband subscriptions speed rank
(ranked across the 9 IVF countries)*

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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.