Spain

Spain key data 2019

Population (m)	46.7
TV households (m)	18.6
Consumer spending on physical video software (€m)	67.7
Comparison with 2018	-11.3%
Consumer spending on physical video software (€m) - Total Europe	2,356.1
Comparison with 2018	-18.3%
Consumer spending on digital video and TV VoD (€m)	606.5
Comparison with 2018	47.2%

Consumer spending on digital video and TV VoD (€m) - Total Europe	10,947.0
Comparison with 2018	29.4%
Consumer spending on total video (€m)	674.3
Comparison with 2018	38.1%
Consumer spending on total video (€m) - Total Europe	13,303.1
Comparison with 2018	17.2%

Spain key commentary

Physical market

In 2019, the Spanish physical home entertainment market continued to contract, closing consumer spending at EUR 67.7 million – a decrease of 11% compared to 2018.

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 has had a positive effect on the market and has contributed to increases of the subscription-based market and pay TV segments. Box office and transactional home entertainment performance is also on the increase, albeit at more moderate rates.

Other relevant developments

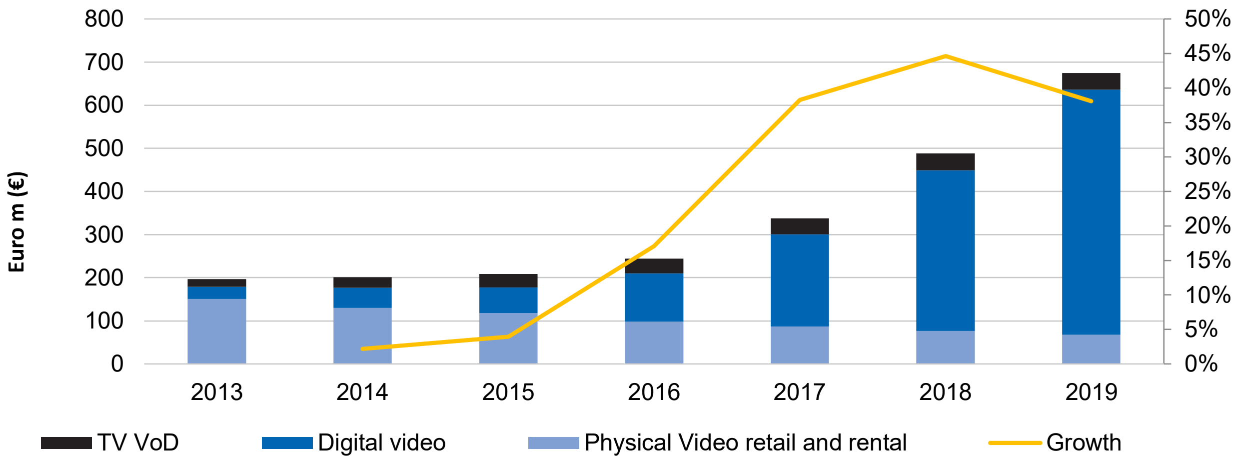
Various initiatives have been launched to help consumers find legal services providing access to film and TV content, e.g. the online portal “Me siento de cine”, which has the support of the local film and AV industry as well as of the Spanish government.

Since March 2018, “La Pantalla Digital” - an online platform wheres 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 the Agorateka, the EU online legal content portal hosted by the EUIPO

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

This commentary was provided by the International Video Federation.

Consumer spending by segment



Video market: Spain

	2013	2014	2015	2016	2017	2018	2019	18/19 %
GENERAL								
Population (m)	46.9	46.8	46.7	46.6	46.6	46.7	46.7	0.1%
TV households (m)	18.1	18.2	18.2	18.3	18.4	18.4	18.6	0.8%
Population Total Europe (m)	624.9	626.1	627.7	629.4	630.9	632.3	633.3	0.2%
TV households Total Europe (m)	255.0	257.3	259.3	261.3	263.2	264.9	266.7	0.7%
Broadband households (m)	9.9	10.6	11.1	12.0	12.8	13.2	13.6	3.3%
Nominal GDP (EUR m)	1,020.3	1,032.2	1,077.6	1,113.8	1,161.9	1,202.2	1,245.3	3.6%
Consumer price index (100 in 2010)	120.7	120.4	100.0	99.4	103.3	110.1	105.2	-4.4%
DVD Video player/recorder penetration (%)	74.7	74.4	73.1	71.8	70.7	69.7	68.3	-2.0%
Blu-ray Disc player/recorders penetration (%)	10.6	12.8	15.3	15.5	15.9	16.0	15.7	-1.5%
DVD Video player/recorder Total Europe (%)	73.2	71.5	69.4	67.0	64.4	61.7	59.2	-4.1%
Blu-ray Disc player/recorders penetration Total Europe (%)	15.4	18.4	20.7	21.8	22.3	22.3	21.7	-2.6%
OTT Subscriptions (m)	0.1	0.4	0.6	1.2	2.9	4.5	7.0	55.6%

Total video software market

	2013	2014	2015	2016	2017	2018	2019	18/19 %
CONSUMER LEVEL ALL VIDEO								
Total market figures include consumption of both physical and digital video								
Total spending on video (EUR m)	196.5	200.7	208.7	244.3	337.8	488.4	674.3	38.0%
Growth (%)		2.2%	3.9%	17.1%	38.3%	44.6%	38.0%	
Total spending on video Total Europe (EUR m)	8,453.2	8,499.2	9,142.4	9,229.7	9,830.8	11,346.4	13,303.1	17.2%
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)	11.6	6.3	6.8	4.6	2.7	1.7	1.4	-22.2%
Physical video rental Total Europe (EUR m)	662.5	517.6	431.4	295.5	214.8	150.2	115.6	-23.0%
Physical video retail (EUR m)	139.0	123.1	110.8	93.6	84.1	74.6	66.4	-11.0%
Physical video retail Total Europe (EUR m)	5,804.8	5,178.1	4,737.7	3,934.4	3,287.6	2,734.8	2,240.4	-18.1%
Physical video software (EUR m)	150.6	129.4	117.6	98.1	86.8	76.3	67.7	-11.3%
Physical video software Total Europe (EUR m)	6,467.3	5,695.7	5,169.1	4,229.9	3,502.5	2,885.0	2,356.1	-18.3%
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)	9.4	11.0	12.0	12.9	13.4	14.0	14.2	1.8%
Rental digital video (EUR m)	10.8	14.0	15.9	17.3	18.2	19.1	19.9	4.2%
Subscription digital video (EUR m)	8.6	22.8	32.3	81.4	182.3	339.8	534.5	57.3%
Total digital video (EUR m)	28.9	47.7	60.2	111.6	213.9	372.9	568.6	52.5%
Total digital video Total Europe (EUR m)	1,270.1	2,004.8	3,089.3	4,093.6	5,354.0	7,414.4	9,837.7	32.7%
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)	17.0	23.6	30.9	34.5	37.1	39.2	37.9	-3.3%
Pay TV TVOD Total Europe (EUR m)	715.7	798.7	884.0	906.2	974.3	1,047.0	1,109.3	6.0%

*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. **3)** The current online figures are a snapshot of the market in March 2020. Figures are updated regularly and so it may not 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.*

Source: Omdia

Key players in the market (in alphabetical order)

Physical + Digital
20th Century Fox Home Entertainmente España
Aurum
Cameo
Divisa Red
Karma Films
Sony Pictures Entertainment Iberia

Physical + Digital
Tri Pictures
Versus Entertainment
Walt Disney Studios Home entertainment

Share of European market 2019

Physical retail
3.0%

Physical rental
1.2%

Digital video (OTT)
5.9%

Pay TV TVOD
3.4%

Average home entertainment spending

Spending per TV household (EURO)
€36.3

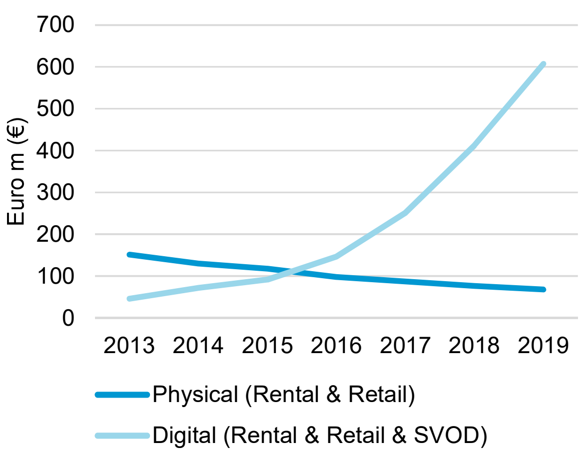
Spending per broadband household (EURO)
€49.5

Digital share of spend vs. broadband speed

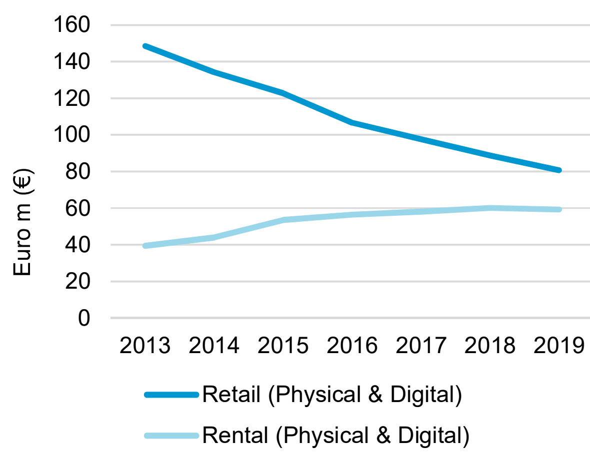
Share digital spend
84%

Broadband download speed rank
(ranked across the 9 IVF countries)
#5

Comparison Physical vs Digital



Comparison Retail vs Rental



Note: Digital (Rental & Retail) includes SVOD data; Rental (Physical & Digital) excludes SVOD data

Source: Omdia