Spain

Spain key data 2018

Population (m)	46.4
TV households (m)	18.9
Consumer spending on physical video software (EUR m)	76.3
Comparison with 2017	-12.0%
Consumer spending on physical video software (EUR m) - Total Europe	2,970.0
Comparison with 2017	-15.8%
Consumer spending on digital video and TV VoD (EUR m)	413.7
Comparison with 2017	68.4%
Consumer spending on digital video and TV VoD (EUR m) - Total Europe	8,785.6
Comparison with 2017	30.9%
Consumer spending on total video (EUR m)	490.1
Comparison with 2017	47.4%
Consumer spending on total video (EUR m) - Total Europe	11,755.7
Comparison with 2017	14.8%

Physical market

In 2018, the Spanish physical home video market continued to decrease, amounting to consumer spending of EUR 76 million – a decrease of 12% compared to 2017.

Online distribution

The uptake of the Spanish digital market has been slow during the past couple of years, due to significant levels of digital piracy. A stronger approach to enforcement and legislative reforms led to a significant increase of the subscription market. The transactional market is growing, but still at a very modest rate.

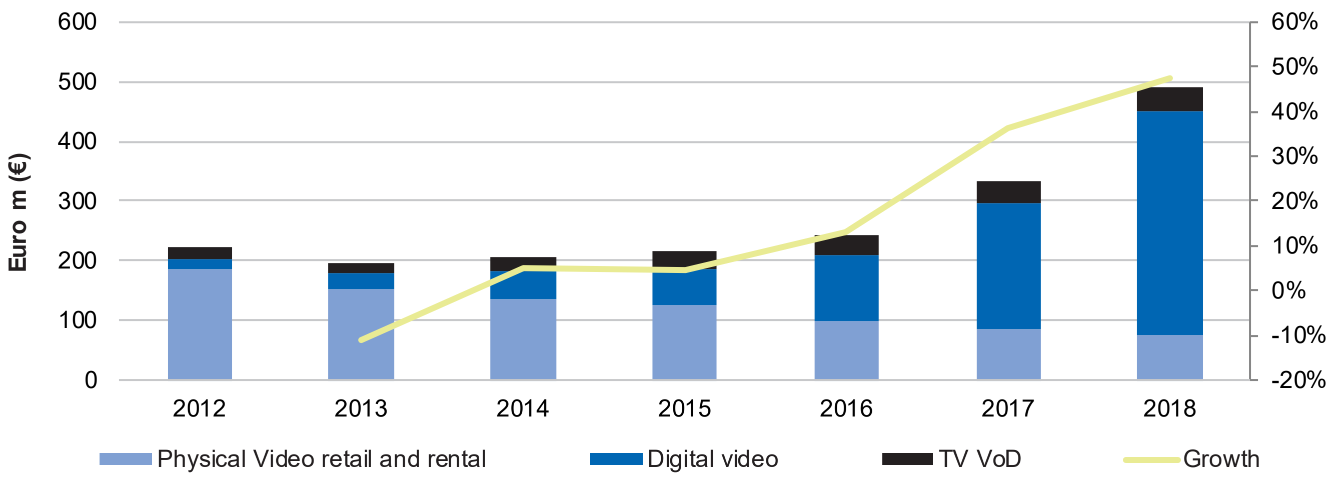
Other relevant developments

Various initiatives have been launched to help consumers find legal offers for film, e.g. the online portal “Me siento de cine”, which has the support of the local film industry and the Spanish government.

In March 2018, “La Pantalla Digital” was added - an online platform on which Spanish audiences can search for legal offers for film, sport events and music available in Spain. This initiative is supported by the Spanish Ministry of Education, Culture and Sport and Agorateka, the European online content portal.

This commentary was provided by the International Video Federation.

Consumer spending by segment



Source: IHS Markit

Video market: Spain	2012	2013	2014	2015	2016	2017	2018	17/18 %
GENERAL								
Population (m)	46.9	46.7	46.5	46.4	46.3	46.4	46.4	0.1%
TV households (m)	18.0	18.1	18.2	18.4	18.6	18.7	18.9	0.9%
Population Total Europe (m)	623.8	624.9	626.1	627.7	629.4	630.9	632.3	0.2%
TV households Total Europe (m)	253.2	255.0	257.3	259.3	261.3	263.2	264.9	0.7%
Broadband households (m)	9.1	9.9	10.7	11.1	12.0	12.8	13.2	3.4%
Nominal GDP (EUR m)	1,039.8	1,025.7	1,037.8	1,080.0	1,118.5	1,163.7	1,211.0	4.1%
Consumer price index (100 in 2010)	102.4	107.4	107.2	89.0	88.5	92.0	98.4	6.9%
DVD Video player/recorder (%)	76.3	76.3	75.6	74.0	71.0	69.4	67.9	-2.1%
Blu-ray Disc player/recorders penetration (%)	6.5	10.6	12.8	15.2	15.3	15.6	15.6	-0.3%
DVD Video player/recorder Total Europe (%)	76.1	73.8	71.7	69.2	66.8	64.2	61.5	-4.2%
Blu-ray Disc player/recorders penetration Total Europe (%)	11.2	15.4	18.4	20.7	21.7	22.3	22.2	-0.3%
OTT Subscriptions (m)	0.0	0.1	0.3	0.5	1.2	2.7	4.3	61.9%

Total video software market	2012	2013	2014	2015	2016	2017	2018	17/18 %
CONSUMER LEVEL ALL VIDEO								
Total market figures include consumption of both physical and digital video								
Total spending on video (EUR m)	221.1	196.4	206.4	215.9	243.6	332.4	490.1	47.4%
Growth (%)		-11.2%	5.1%	4.6%	12.8%	36.5%	47.4%	
Total spending on video Total Europe (EUR m)	8,824.2	8,449.5	8,513.6	9,183.9	9,474.6	10,236.3	11,755.7	14.8%
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)	21.3	11.6	6.3	6.8	4.6	2.7	1.7	-35.1%
Physical video rental Total Europe (EUR m)	865.1	683.1	526.3	430.2	293.1	212.9	152.0	-28.6%
Physical video retail (EUR m)	163.7	139.6	127.7	119.9	93.6	84.1	74.6	-11.3%
Physical video retail Total Europe (EUR m)	6,607.5	5,808.5	5,184.7	4,756.8	3,989.8	3,312.4	2,818.0	-14.9%
Physical video software (EUR m)	184.9	151.2	134.0	126.7	98.1	86.8	76.3	-12.0%
Physical video software Total Europe (EUR m)	7,472.6	6,491.6	5,711.0	5,187.0	4,282.9	3,525.3	2,970.0	-15.8%
CONSUMER LEVEL DIGITAL VIDEO (OTT) – TOTAL SPENDING								
The purchase or rental of films and TV series delivered over the open internet through transactional models (also known as EST, DTO, Internet VOD) or on a subscription basis. This category specifically excludes sports, live events and adult content to ensure it is comparable to physical video data.								
Retail digital video (EUR m)	5.2	9.4	11.0	12.0	12.9	13.5	14.0	3.8%
Rental digital video (EUR m)	6.8	10.8	14.0	15.9	17.3	18.2	19.1	4.6%
Subscription digital video (EUR m)	4.8	8.0	23.8	30.4	80.8	176.4	340.7	93.1%
Total digital video (EUR m)	16.9	28.2	48.8	58.2	111.0	208.1	373.8	79.6%
Total digital video Total Europe (EUR m)	716.9	1,255.7	2,021.0	3,127.8	4,287.2	5,719.6	7,737.1	35.3%
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. These, paid for at the point of consumption, transactions occur only on set-top-boxes or through online services provided as part of a wider pay TV package to which consumers must subscribe prior to purchase. This category specifically excludes sports, live events and adult content to ensure it is comparable to physical video data.								
Pay TV TVOD (EUR m)	19.2	17.0	23.6	31.0	34.5	37.5	40.0	6.5%
Pay TV TVOD Total Europe (EUR m)	634.8	702.1	781.5	869.0	904.6	991.6	1,048.5	5.7%

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 IHS Markit methodology.*
3) *The current online figures are a snapshot of the market in March 2019. 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.*

Key players in the market *(in alphabetical order)*

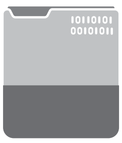
Physical and Digital

- Aurum
- Cameo
- Divisa Red
- Karma Films
- Sony Pictures Entertainment Iberia
- Tri Pictures
- 20th Century Fox Home Entertainmente España
- Versus Entertainment
- Walt Disney Studios Home entertainment
- Warner Bros Entertainment España

Share of European market 2018

Physical retail
2.6%

Physical rental
1.1%



(OTT)
4.8%

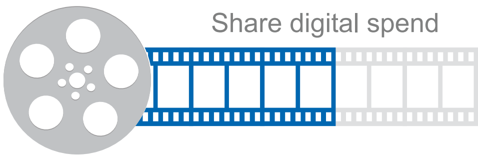
Pay TV TVOD
3.8%

Average home entertainment spending

Spending per TV household (EURO)
€25.9

Spending per broadband household (EURO)
€37.1

Digital share of spend vs. broadband speed



Share digital spend
76%

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

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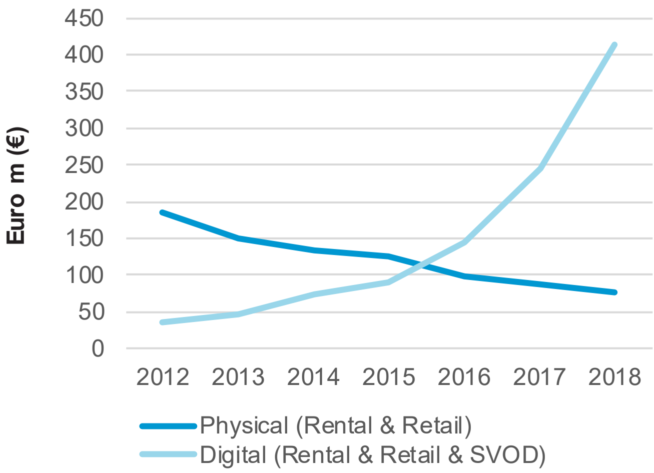
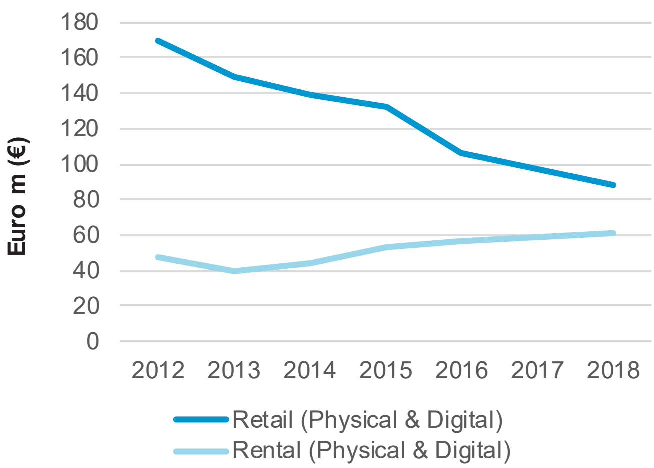
Comparison Physical vs Digital



Comparison Retail vs Rental



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

Source: IHS Markit