

Spain Will Have Over 20 Million Subscription OTT Service Users by 2021

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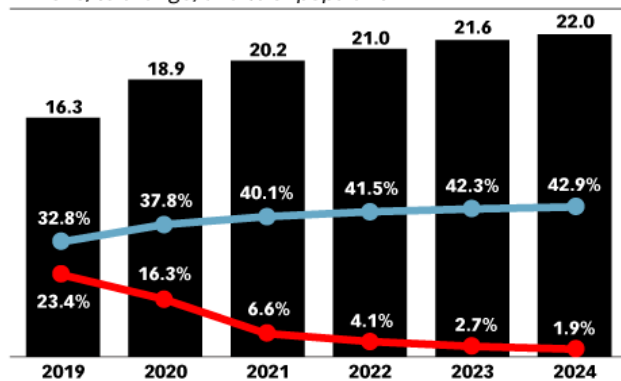
eMarketer Editors

Streaming services are increasingly vying for projects, talent, and viewers in Spain. [Netflix](#) began producing originals in Spain in 2016 and opened its first European production hub in Madrid in spring of 2019. Not to be outdone, HBO España and Amazon Studios each produced several series in the country last year. Meanwhile, Viacom and Spain-based broadcaster [Atresmedia](#) continued making investments in this vein, as did telecom behemoths Orange and Telefónica (via its streaming service Movistar).

Greater studio competition, coupled with an increase in digital video viewing in Spain amid the nationwide lockdown, will push the number of subscription OTT video service users in Spain to 20.2 million in 2021. That's 40.1% of the country's population.

Subscription OTT Video Service Users in Spain, 2019-2024

millions, % change, and % of population



■ Subscription OTT video service users
■ % change ■ % of population

Note: individuals of any age who watch video via any app or website at least once per month that provides paid subscription access to streaming video content over the internet and bypasses traditional distribution; examples include Amazon Video, HBO Now, Hulu, Netflix, SlingTV, and YouTube Red; OTT video services are not mutually exclusive; includes overlap between video services
Source: eMarketer, Sep 17, 2020

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Netflix reported that it gained 10.1 million subscribers worldwide in Q2 2020, a direct result of both the pandemic and heavy expansion initiatives. The company said it had added another 15.8 million in Q1 2020, which comes out to 25.9 million new subscribers worldwide in H1. In light of this, we adjusted our Netflix user estimates up for every country in Western Europe this year.

Though Netflix will boast the largest user base in Spain, its share of subscription OTT video service users will be lower there than in other major markets in 2020. In Germany, Netflix will claim 77.1% of such users, and in Denmark, France, and the UK, over 80%. In Spain, however, that figure will be 70.0%, likely because viewers there can choose from a wider variety of subscription OTT video services.

Netflix Viewer Penetration in Western Europe, by Country, 2020

% of subscription OTT video service users

Norway	87.3%
UK	86.7%
Sweden	85.4%
France	82.6%
Denmark	81.7%
Netherlands	80.4%
Germany	77.1%
Finland	70.6%
Spain	70.0%
Italy	65.1%
Other	78.0%
Western Europe	78.6%

Note: individuals of any age who watch Netflix via the app or website at least once per month

Source: eMarketer, Oct 2020

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“Growth should slow down in H2 2020, so Netflix must continue to work hard and fend off competition from emerging platforms like Disney+, HBO Max, and even Amazon Prime Video,” said Matteo Ceurvels, eMarketer research analyst at Insider Intelligence. “Though competition abounds, we still view the subscription OTT landscape as a story of ‘Netflix versus the rest.’”