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Study on **Subscriptions** in Spain

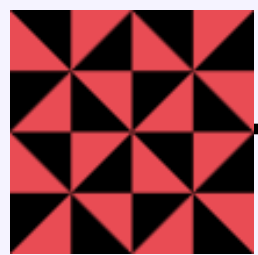
April
2026



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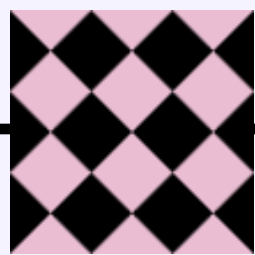
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01



Background

02



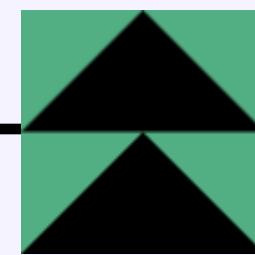
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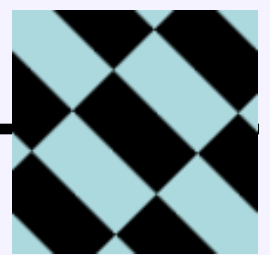
Methodology

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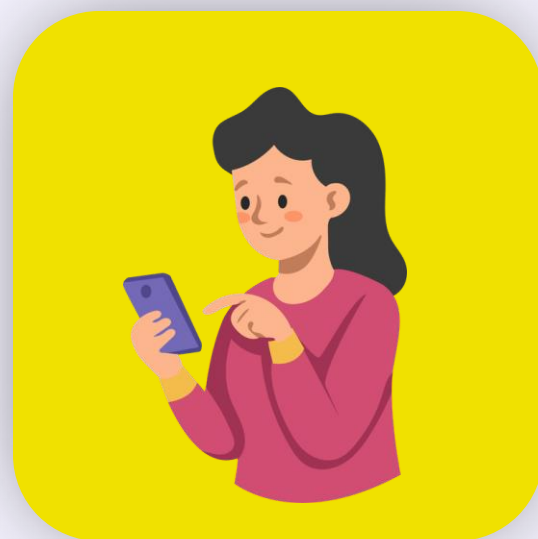


Conclusions

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Background



Background

- 01** The proliferation of digital services in recent years has consolidated the subscription model as a common form of consumption among Spaniards, ranging from entertainment to information, health and productivity.
- 02** In this context, we have carried out a study to analyse Spanish consumers' behaviour towards paid subscriptions, their usage habits, their price sensitivity and their attitude towards cancellation.
- 03** The study gathers information on the number and type of subscriptions contracted, frequency of use, monthly spend, reasons for cancellation and willingness to subscribe to new services in the coming months.
- 04** The results presented below address the stated objectives, with special attention to generational differences.

Objectives



Objectives

01

To determine the penetration level of paid subscriptions among Spaniards and the number of services contracted

02

To identify the most commonly contracted types of subscriptions and analyse how frequently Spaniards use them.

03

To measure monthly spending on subscriptions and assess price sensitivity in the event of potential increases.

04

To analyse cancellation behaviour: frequency, main reasons and retention factors that would prevent churn.

05

To explore Spaniards' preferences regarding payment models and their level of saturation with current subscriptions.

06

To assess the intention to subscribe to new services in the coming months among Spaniards who are not currently subscribed to any service.

Methodology



Technical Details

Universe

Spanish population aged 18 to 75

Sample

1,000 interviews

Scope

National (Spain)

Technique

Online self-administered interview - CAWI

Fieldwork dates

April 2026

Questionnaire

Semi-structured, lasting approximately 7 minutes

Sampling Error

With a sample size of 1,000 interviews, the sampling error is estimated at +/- 3.16% for overall data, p=q=50, with a 95% confidence level

Anonymity and confidentiality

The complete anonymity of respondents' answers is guaranteed. Responses will be used solely for the preparation of statistical tables

Quality Control

In accordance with ISO 20252 and the ICC/ESOMAR Code of Conduct.

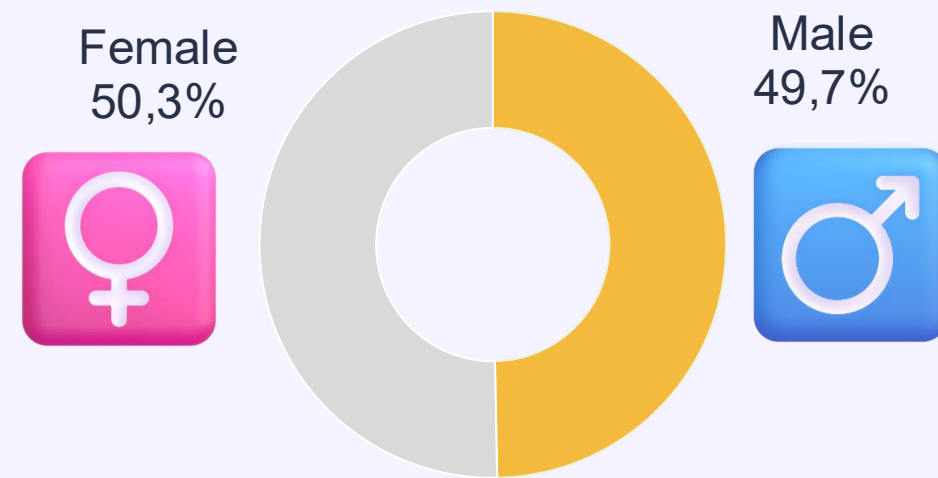


Results

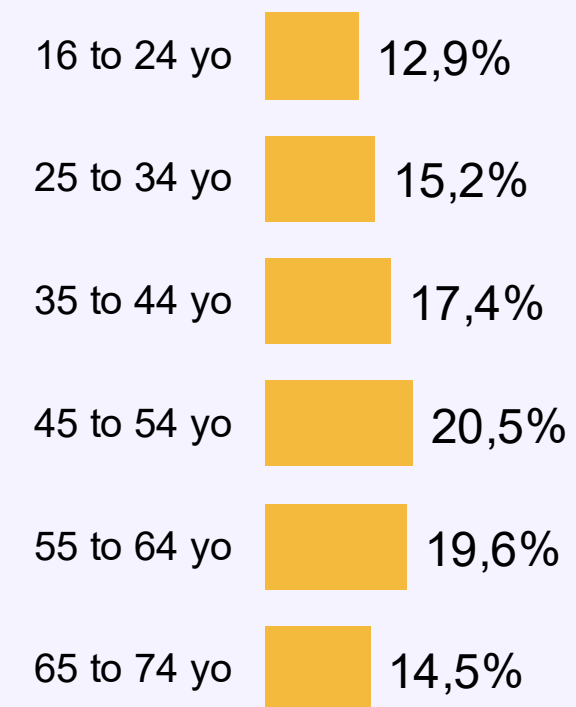


Sample Composition

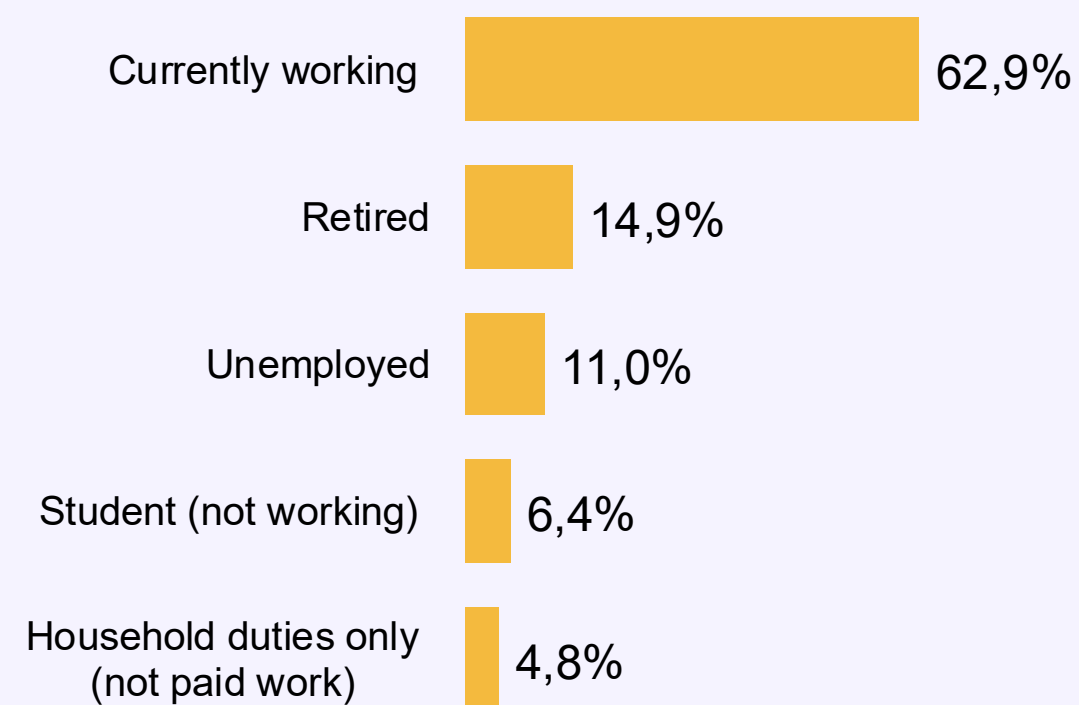
Gender



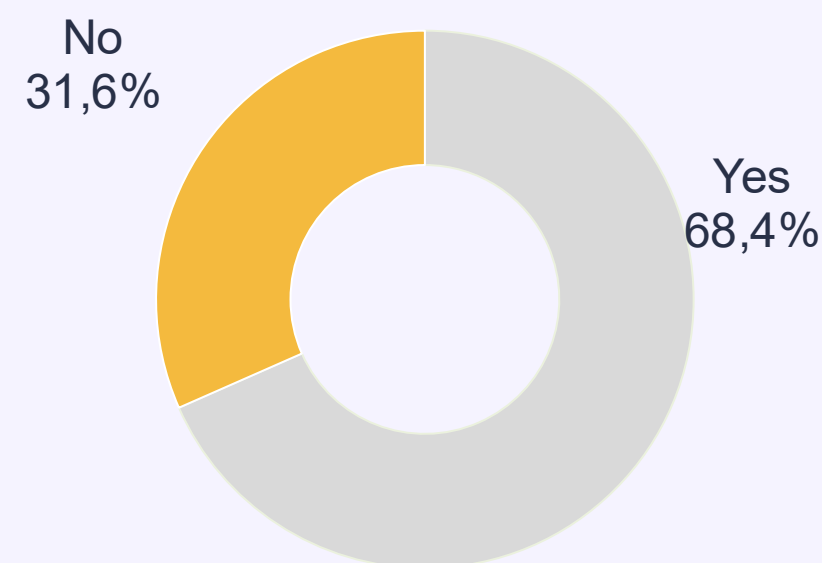
Age



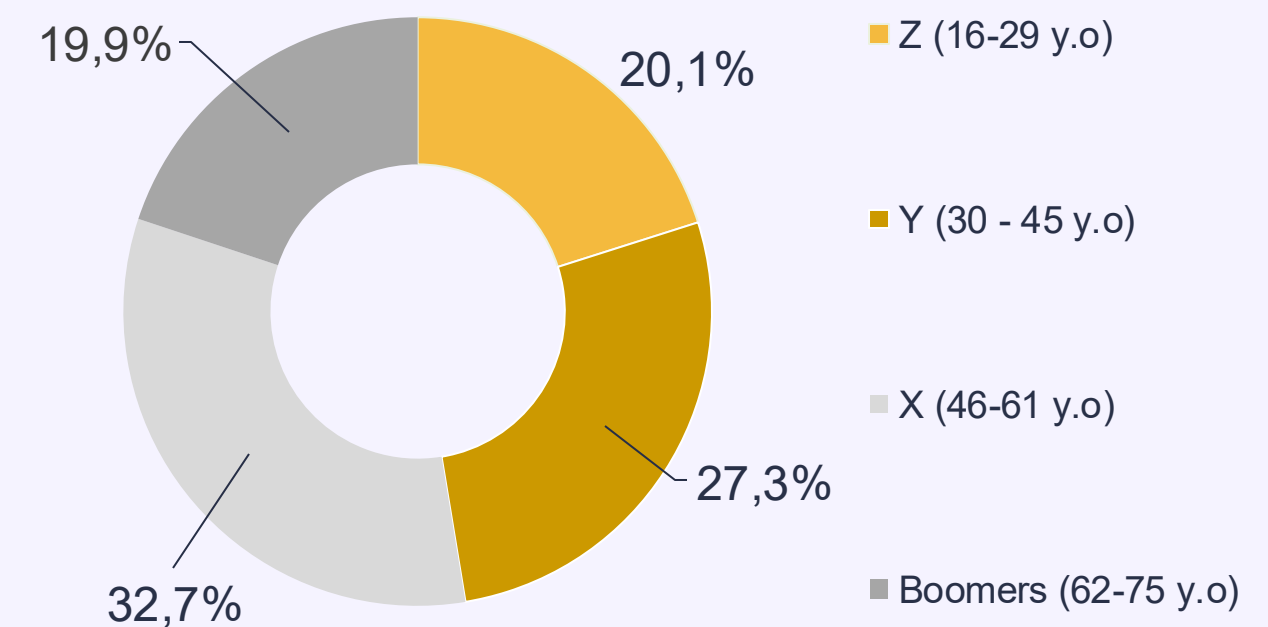
Employment status



Head of household

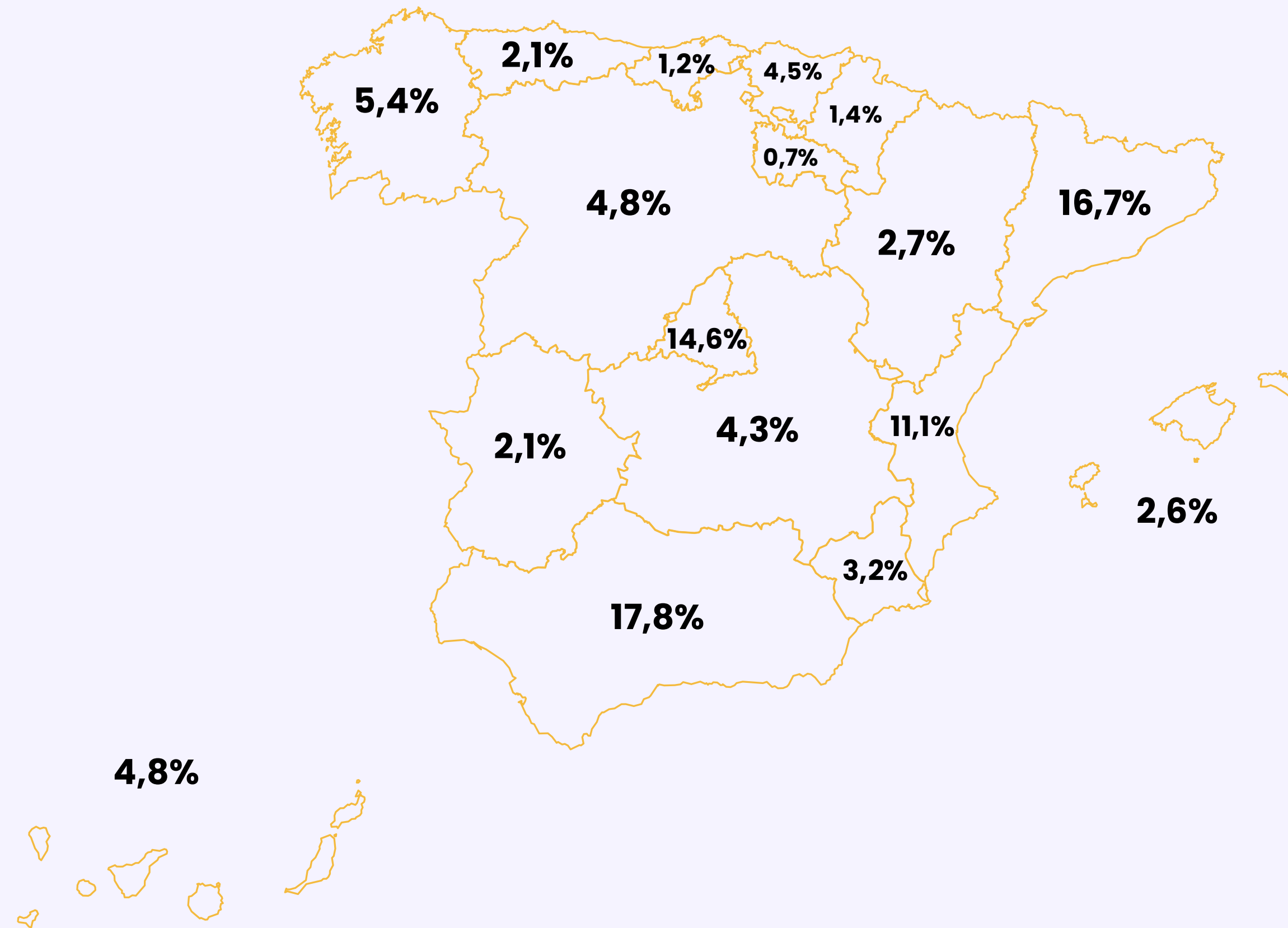


Generation



Base: 1,000 interviews

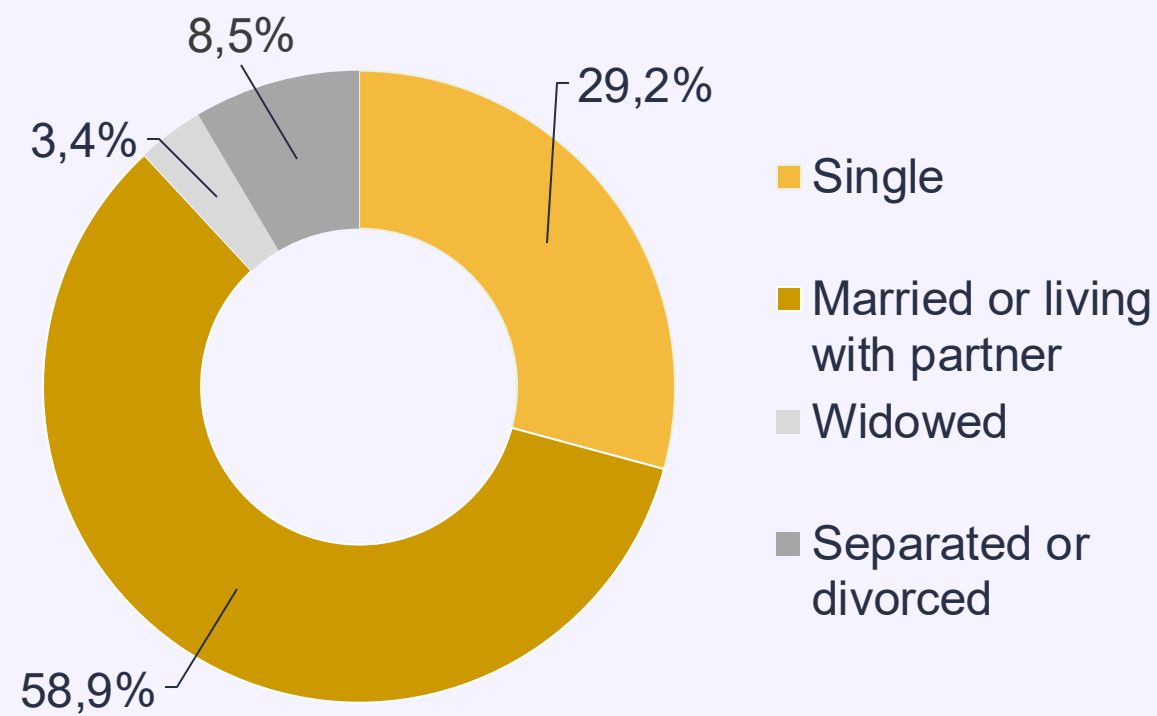
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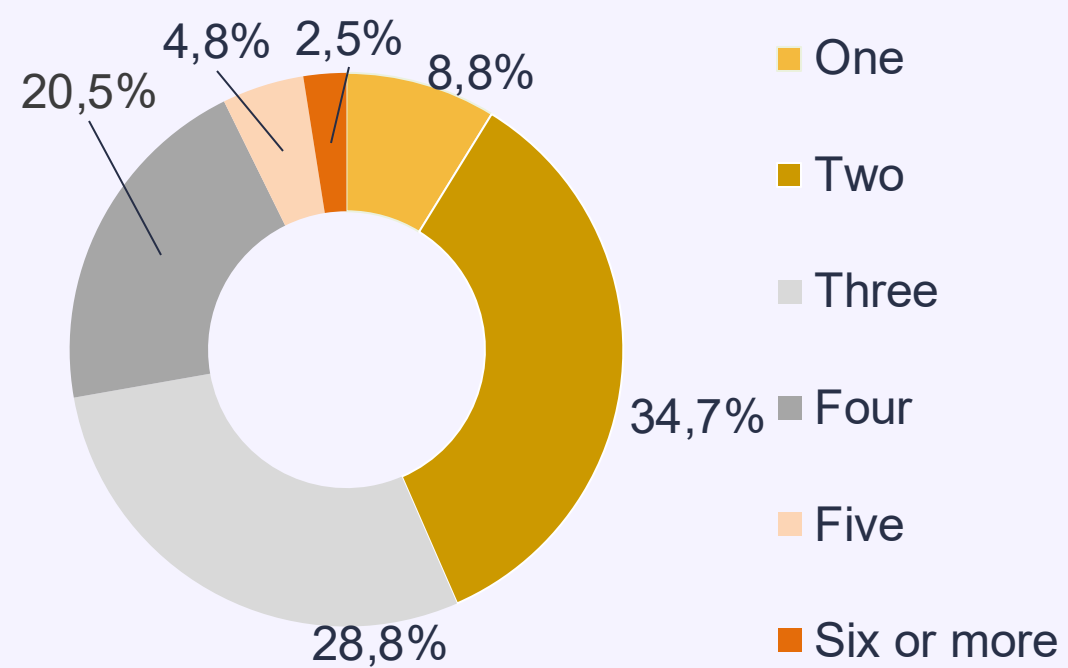
Sample Composition

Base: 1,000 interviews

Marital Status



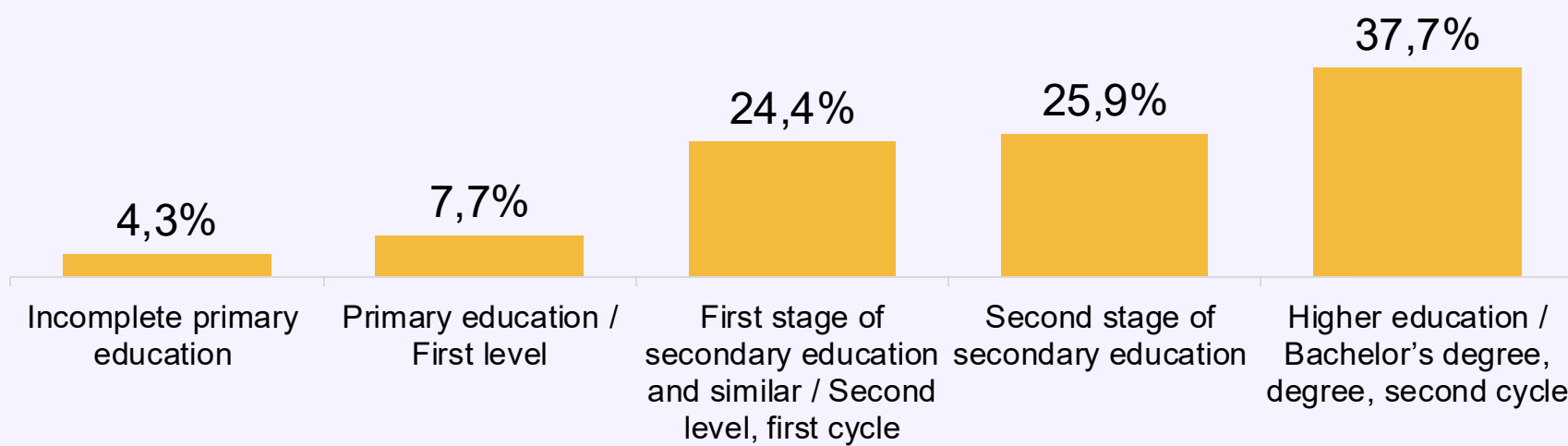
Members in the household



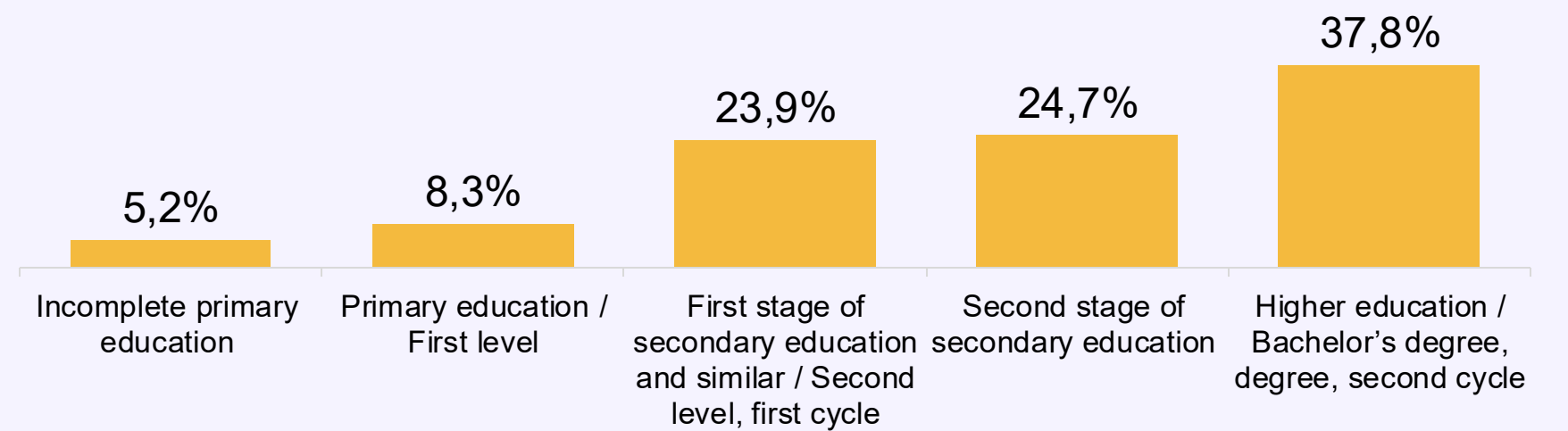
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Sample Composition

Respondent's education level



Head of household's education level



Base: 1,000 interviews

Number of paid subscriptions held

Three in four Spaniards have at least one paid subscription. The largest group has 2-3 subscriptions (36.9%), followed by those with only one (24.8%).

75%
At least 1 subscription

Base: 1,000 interviews

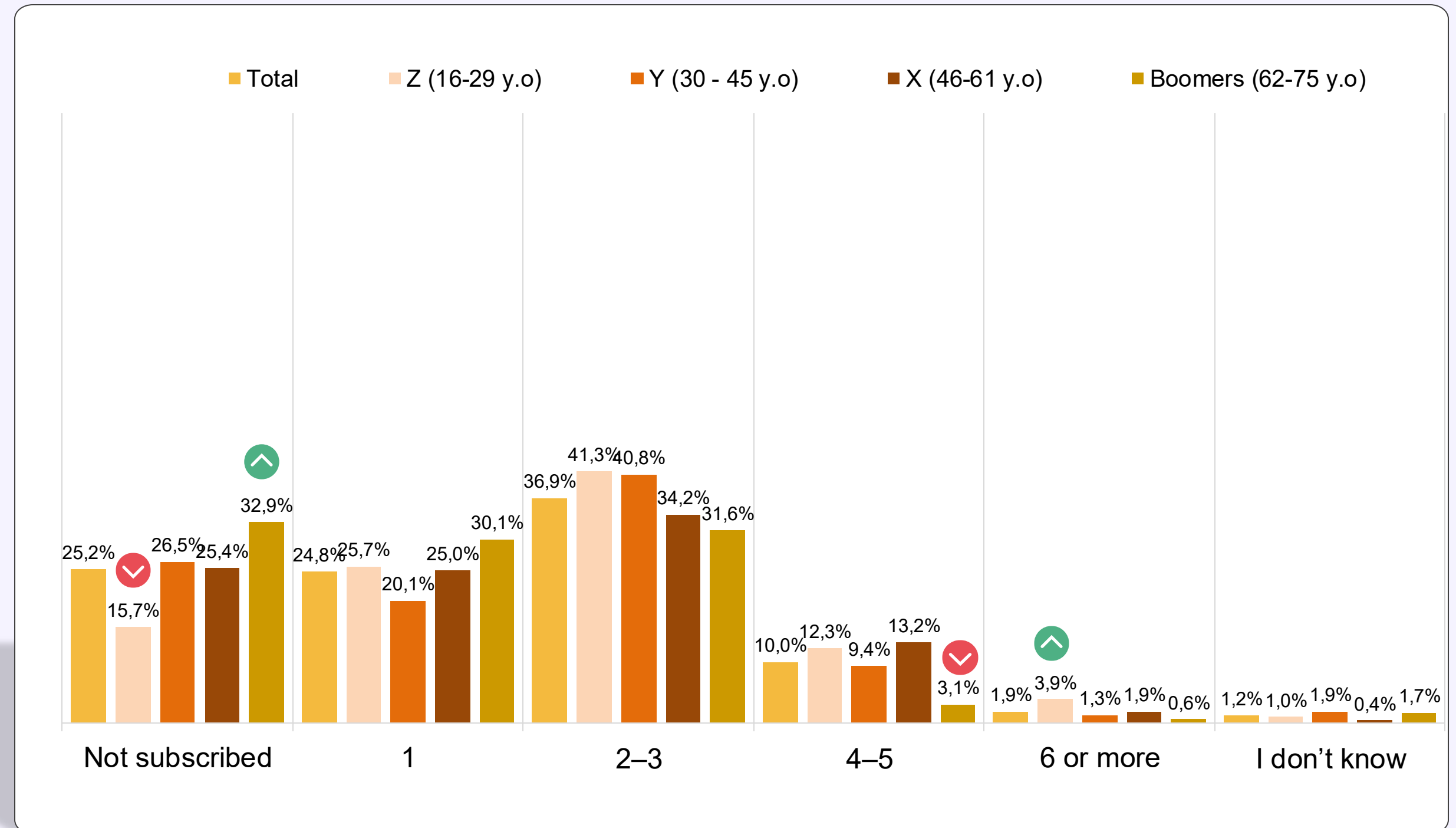
P1. How many subscriptions, whether music, TV, press, etc., do you currently pay for?

- ⬆️ Significantly higher differences are compared with the total sample
- ⬇️ Significantly /lower differences are compared with the total sample

Number of paid subscriptions held

Generation Z accumulates the highest number of subscriptions, standing out in the 4-5 range (12.3%) and 6 or more (3.9%). Boomers, by contrast, have the highest proportion of non-subscribers (32.9%) and the lowest proportion in the 4-5 subscriptions range, reflecting lower penetration of the subscription model among older Spaniards.

Base: 1,000 interviews



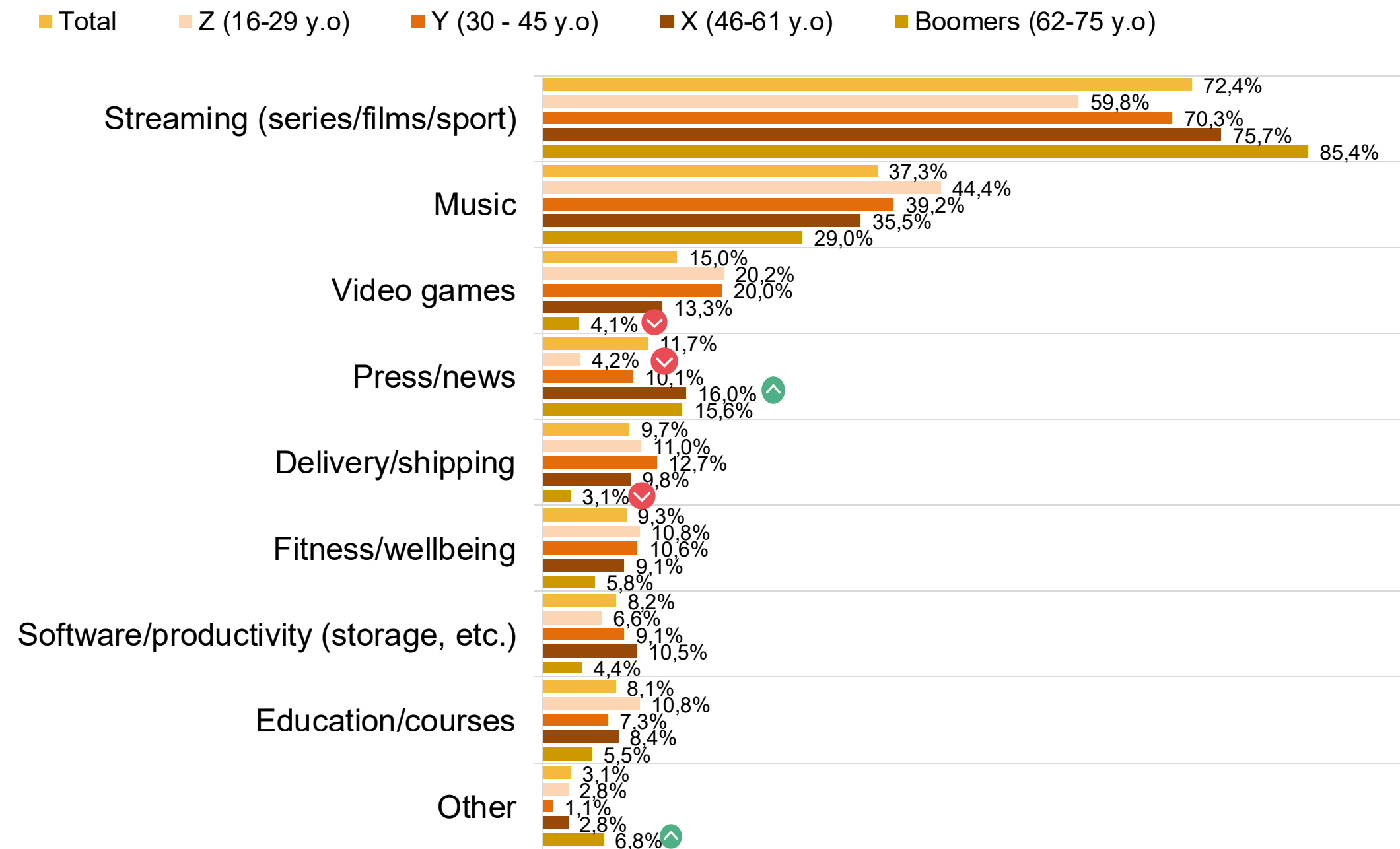
- ⬆️ Significantly higher differences are compared with the total sample
- ⬆️ Significantly /lower differences are compared with the total sample

Types of paid subscriptions contracted

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Among Spaniards with subscriptions, streaming for series, films and sport is by far the most commonly contracted type (72.4%), followed by music (37.3%) and video games (15%).

Boomers stand out in streaming (85.4%), while Gen Z and Millennials show greater diversification, with a stronger presence in music (44.4% and 39.2%, respectively). Gen X stands out in press and news (16%).



Base : subscribers, 736 interviews

P2. What type are they?

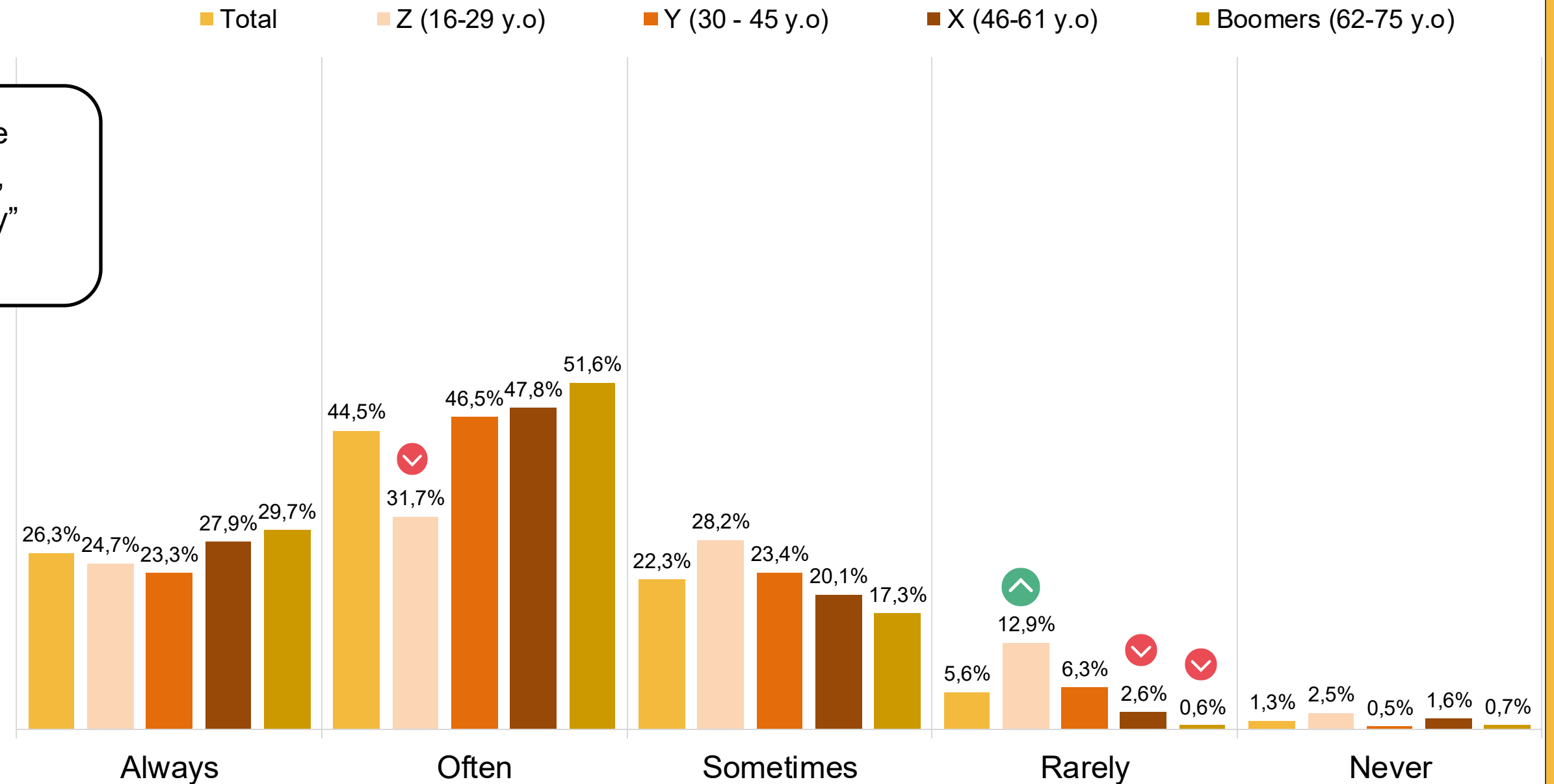
▲ Significantly higher differences are compared with the total sample
▼ Significantly /lower differences are compared with the total sample

Frequency of use

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Spaniards with paid subscriptions use them intensively: 70.8% are heavy users, meaning they use their subscriptions often or always

Boomers are the most loyal and intensive users (81.4% heavy). Gen Z, by contrast, records the highest percentage for “rarely” (12.9%).



Heavy (people who use their subscriptions “often” or “always”)

Medium: (people who use them “sometimes” or “rarely”)

Light: (people who “never” use them)

Base : subscribers, 736 interviews

P3. Thinking about your paid subscriptions, how often do you generally use them?

▲ Significantly higher differences are compared with the total sample
▼ Significantly /lower differences are compared with the total sample

Monthly spending on subscriptions

47% of subscribers spend between EUR20 and EUR60 per month on subscriptions

47%

Spend between 20 and 60€
per month



Base : subscribers, 736 interviews

Monthly spending on subscriptions

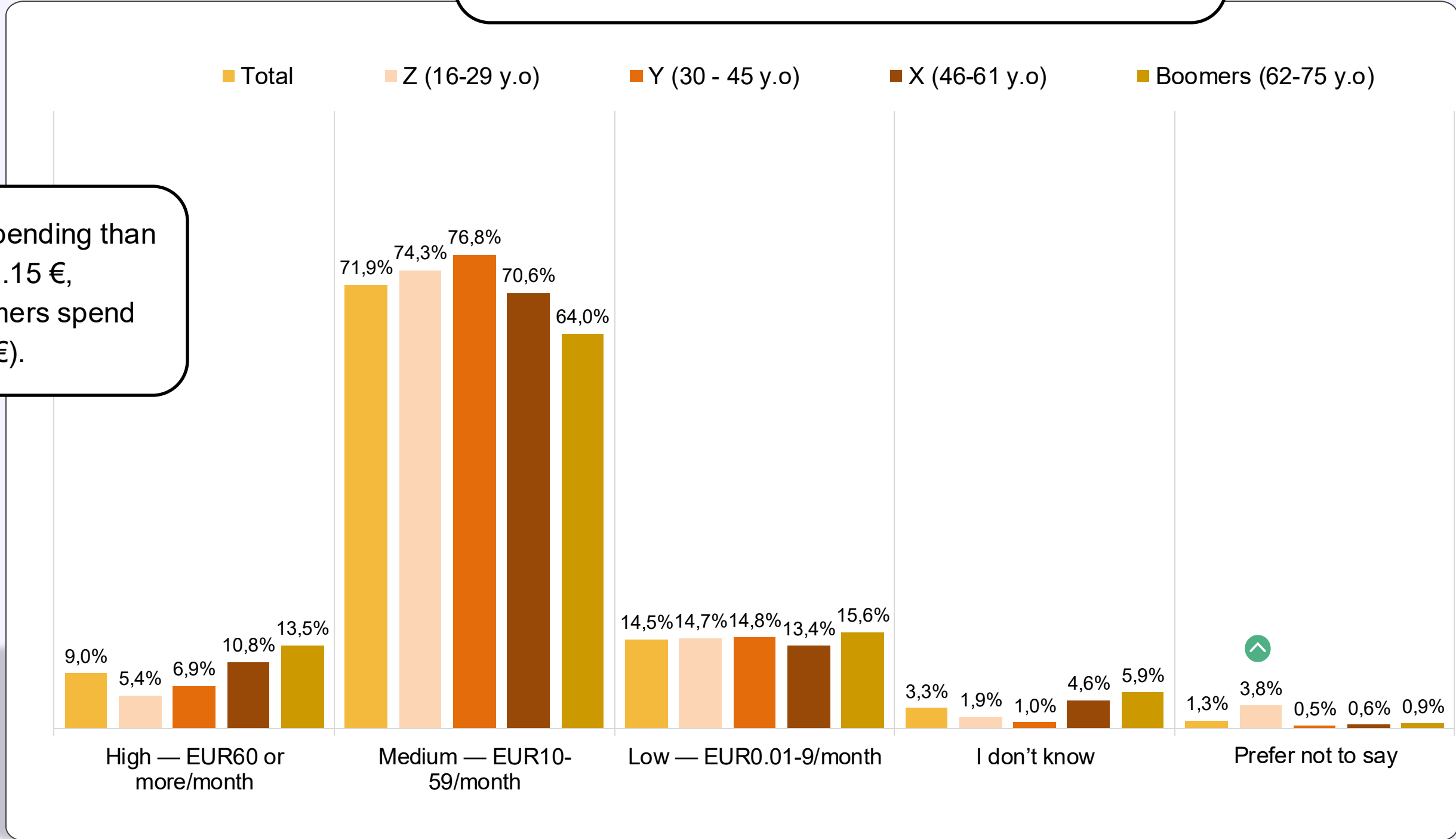
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Monthly subscription spending among Spaniards is concentrated mainly in the medium range: 28.5% spend 20-39€ and 25.4% spend 10-19 €, with an average of 28.81 € per month. Only 9% spend 60€ or more.

Gen Z and Millennials show lower spending than the rest (averages of 26.51 € and 27.15 €, respectively), while Gen X and Boomers spend somewhat more (30.93 € and 30.41€).

Low (Spend "0,01-9 €")
Medium (Spend "10-59 €")
High (Spend "60 € or more")

Base : subscribers, 736 interviews



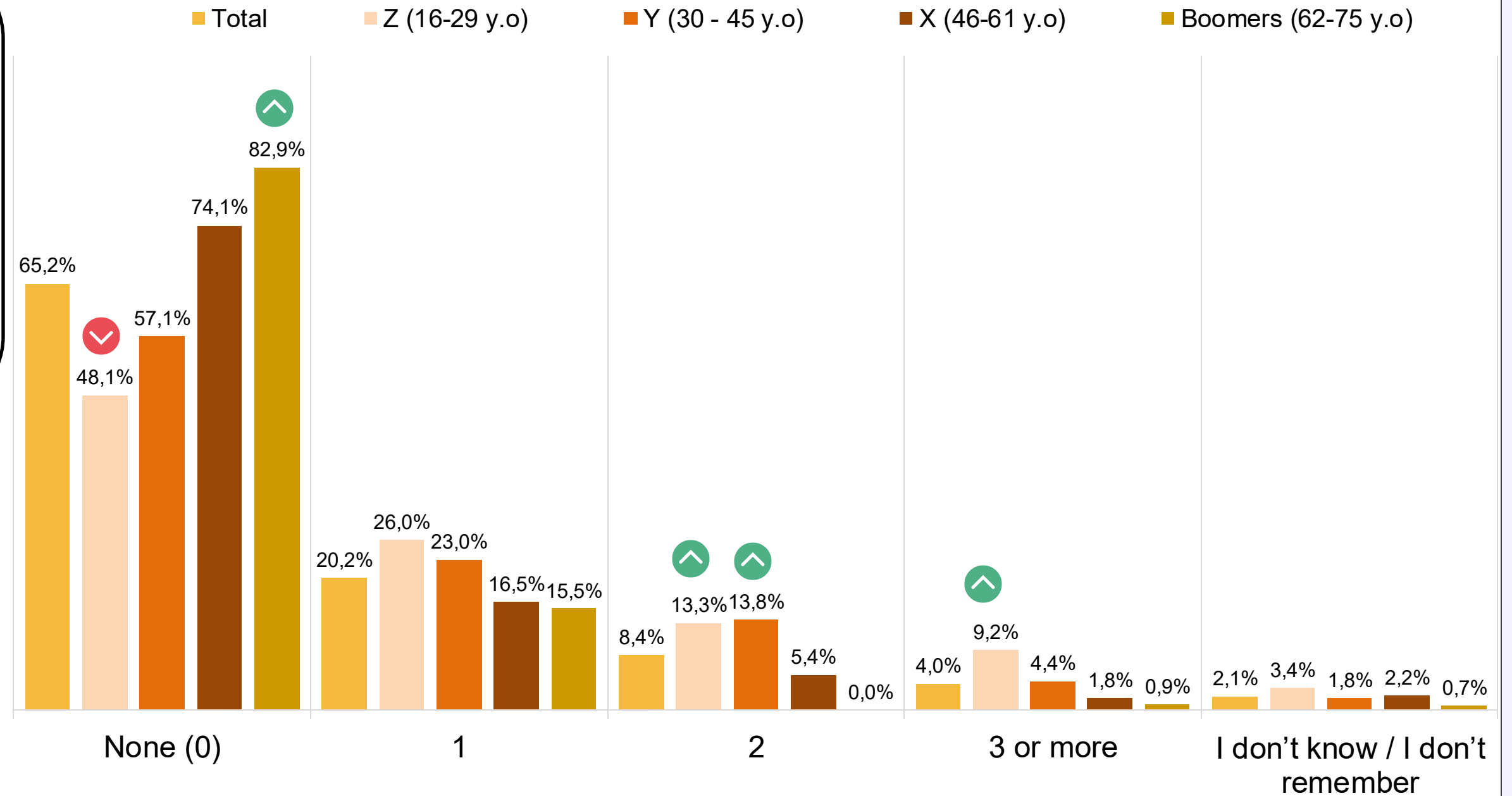
⬆️ Significantly higher differences are compared with the total sample
 ⬆️ Significantly /lower differences are compared with the total sample

P4. Approximately how much do you spend per month on subscriptions?

Subscriptions cancelled in the last 6 months

Almost two in three Spaniards with subscriptions have not cancelled any in the last 6 months (65.2%), reflecting strong user loyalty

However, there is notable churn among younger segments: Gen Z cancels the most, standing out significantly in cancellations of 2 subscriptions, something also observed among Gen Y (13.3% and 13.8%, respectively), and 3 or more (9.2%). Boomers are the most loyal, with the highest proportion of no cancellations (82.9%), while Gen X is also above average on this measure (74.1%).



Base : subscribers, 736 interviews

P5. In the last 6 months, how many subscriptions have you cancelled?

- ⬆️ Significantly higher differences are compared with the total sample
- ⬇️ Significantly /lower differences are compared with the total sample

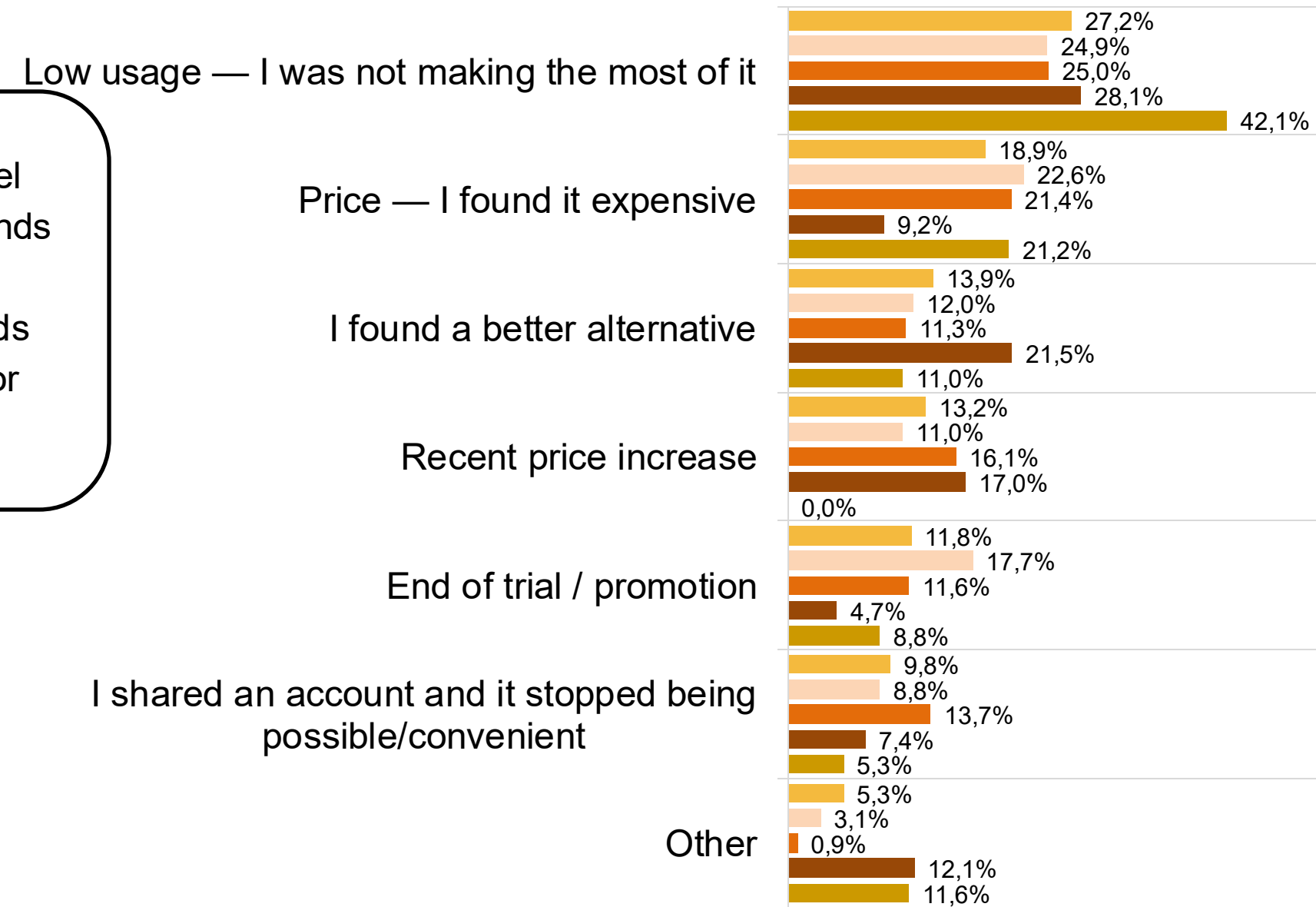
Reasons for cancellation



Among Spaniards who have cancelled a subscription, the main reason is low usage or not making enough use of the service (27.2%), followed by high price (18.9%) and having found a better alternative (13.9%).

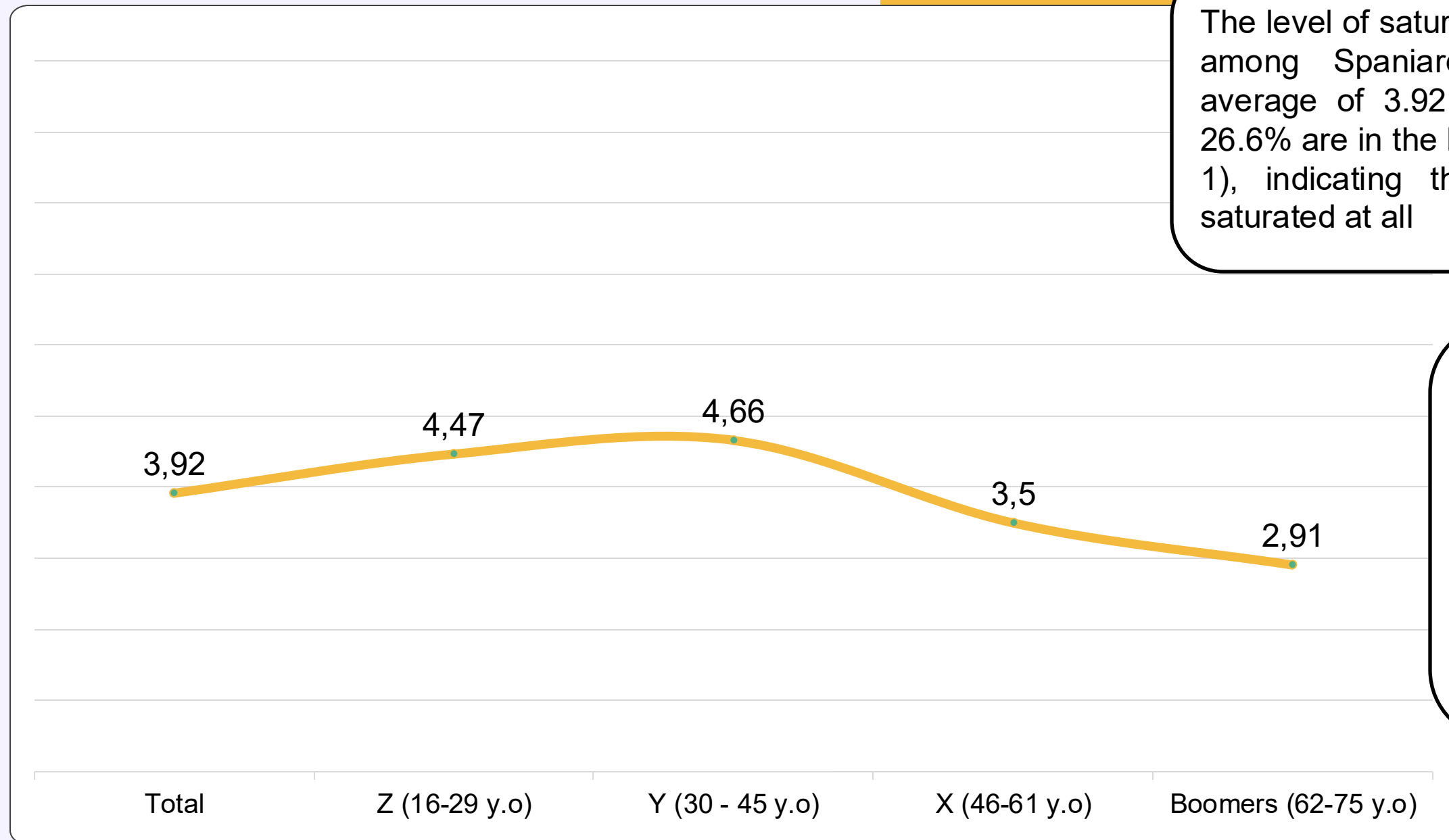
By generation, Boomers mainly cancel due to low usage (42.1%). Gen Z stands out for cancelling when a trial or promotion ends (17.7%). Gen X stands out significantly more for cancelling for other reasons not listed (12.1%).

■ Total ■ Z (16-29 y.o) ■ Y (30 - 45 y.o) ■ X (46-61 y.o) ■ Boomers (62-75 y.o)



Base ex-subscribers, 240 interviews

Level of saturation with subscriptions



The level of saturation with subscriptions among Spaniards is low, with an average of 3.92 out of 10. A total of 26.6% are in the bottom 2 box (scores 0-1), indicating that they do not feel saturated at all

By generation, Gen X and Boomers feel the least saturation (averages of 3.50 and 2.91, respectively), with the highest bottom 2 box percentages (35.4% and 38.6%). By contrast, Gen Z and Millennials show a greater feeling of saturation (averages of 4.47 and 4.66), which is consistent with their higher number of active subscriptions

Top 2 Box: percentage of subscribed Spaniards who gave scores of 9 or 10
Bottom 2 Box: percentage of subscribed Spaniards who gave scores of 0 or 1

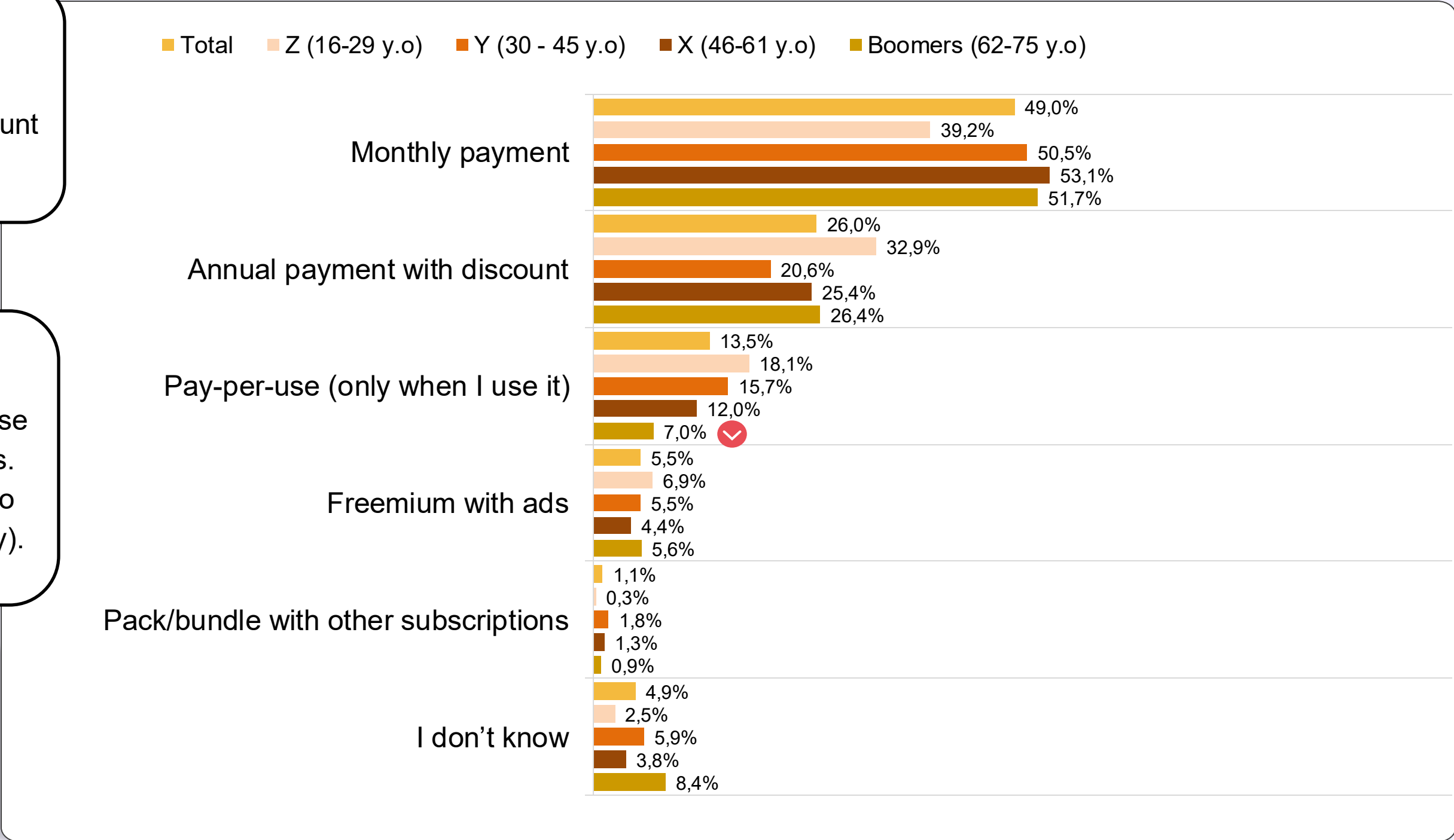
Base : subscribers, 736 interviews

Preferred payment model for a new subscription

Monthly payment is the preferred model among Spaniards when subscribing to a new service (49%), followed by annual payment with a discount (26%) and pay-per-use (13.5%).

Gen Z is the most inclined towards annual payment with a discount (32.9%) and pay-per-use (18.1%), pointing to a greater search for savings. Gen X and Millennials prefer monthly payment to a greater extent (53.1% and 50.5%, respectively).

Base : subscribers, 736 interviews



↑ Significantly higher differences are compared with the total sample
↓ Significantly /lower differences are compared with the total sample

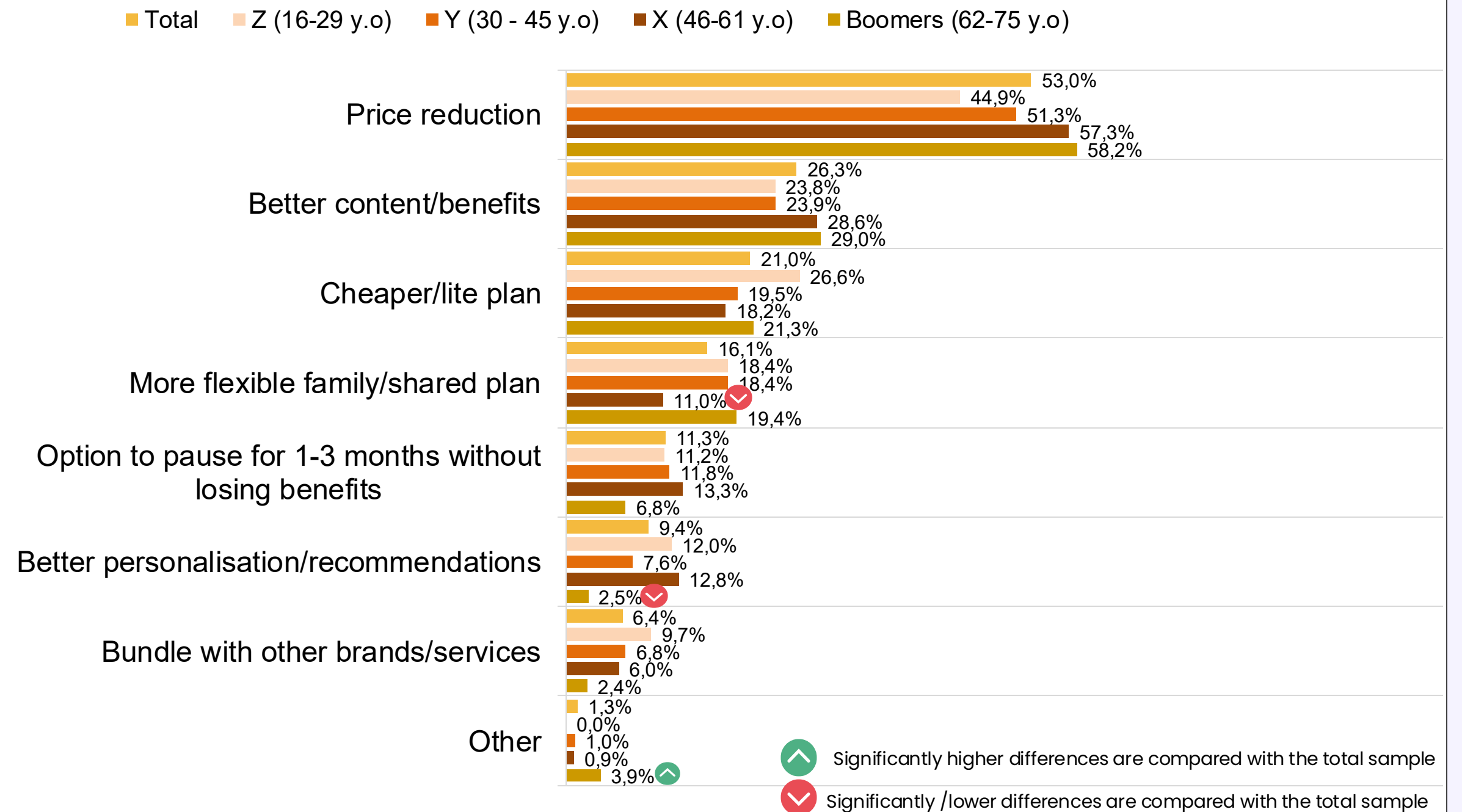
P8. If you intended to take out a new subscription, which model would you generally prefer?

What would make someone stay in a subscription they were about to cancel

A price reduction is by far the main retention factor for Spaniards (53%), followed by better content or benefits (26.3%) and a cheaper or lite plan (21%).

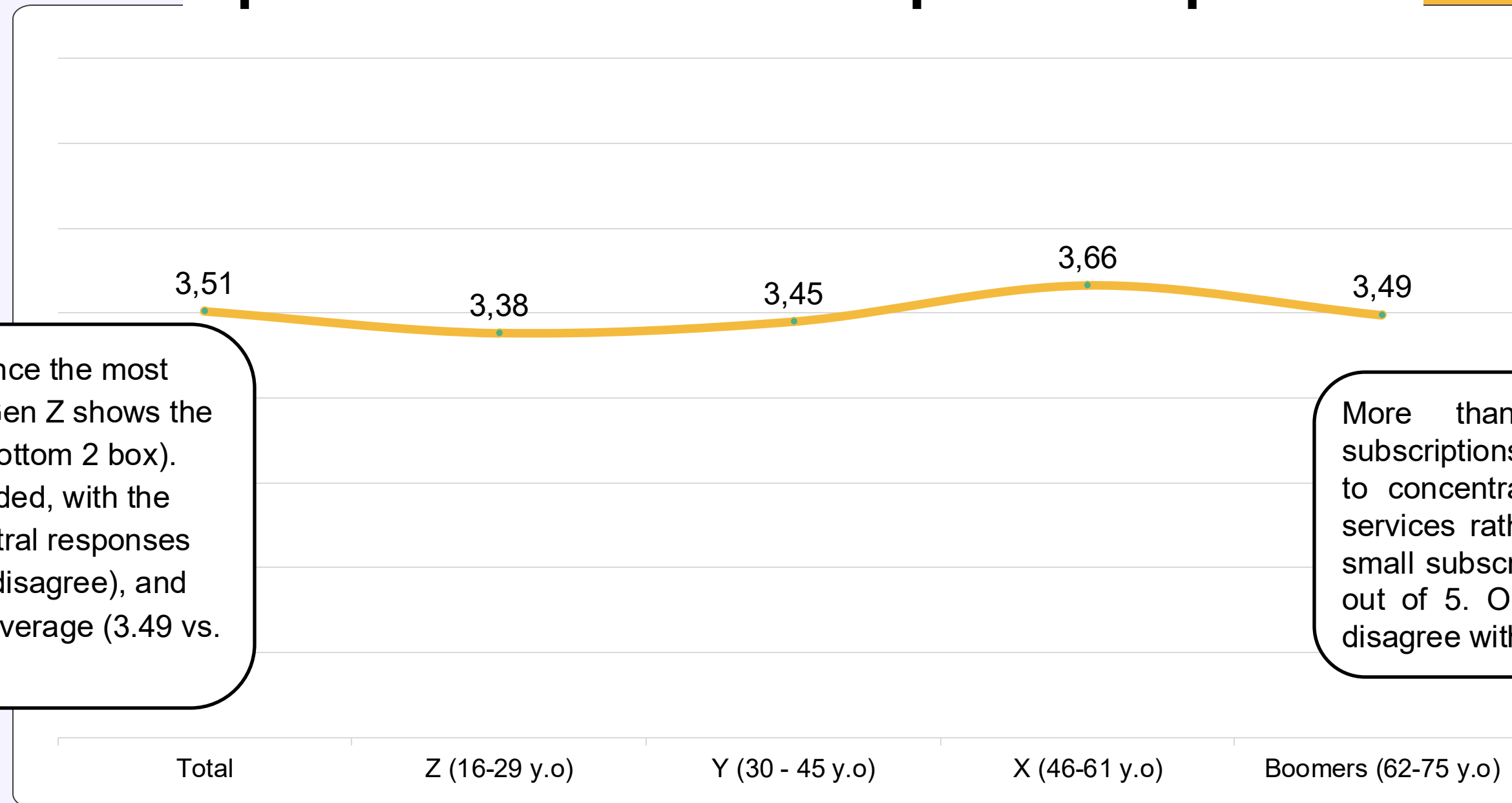
By generation, Gen X and Boomers are the most price-sensitive as a retention factor (57.3% and 58.2%). Gen Z, in addition to price reduction, values a cheaper lite plan more than the rest (26.6%). The family or shared plan matters least to Gen X (11%), and greater personalisation is a significantly weaker retention factor for Boomers than for the rest

Base : subscribers, 736 interviews



Level of agreement

preference for fewer top subscriptions



Gen X shares this preference the most (58.3% top 2 box), while Gen Z shows the highest rejection (19.7% bottom 2 box). Boomers are more undecided, with the highest percentage of neutral responses (43.9% neither agree nor disagree), and are closest to the overall average (3.49 vs. 3.51 total).

More than half of Spaniards with subscriptions (52.3% top 2 box) would prefer to concentrate their spending on 1-2 top services rather than spread it across many small subscriptions, with an average of 3.51 out of 5. Only 13.2% disagree or strongly disagree with this proposed alternative

Top 2 Box: percentage of subscribed Spaniards who answered “agree” or “strongly agree”

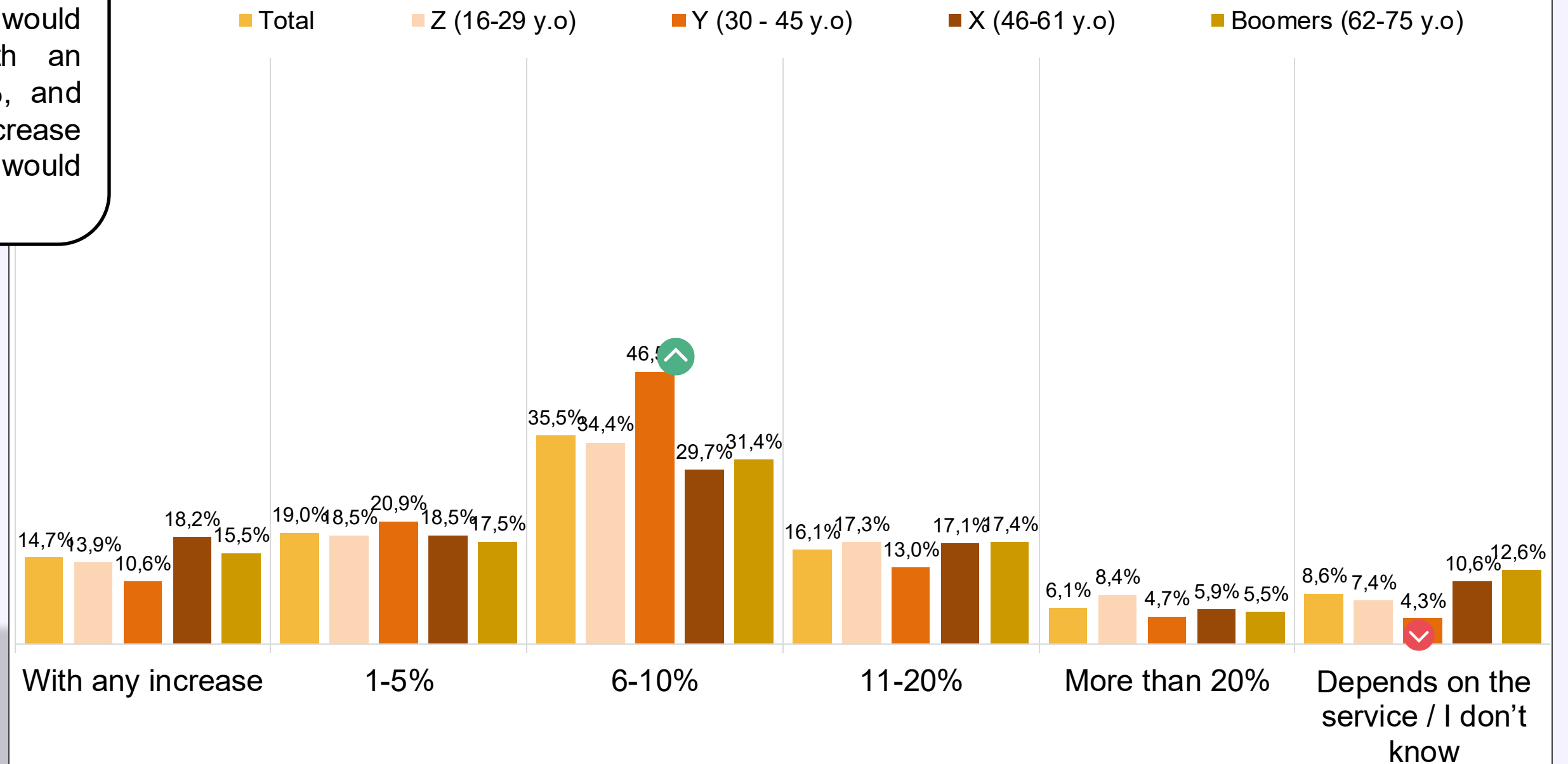
Bottom 2 Box: percentage who answered “strongly disagree” or “disagree”

Base : subscribers, 736 interviews

Price increase threshold for considering cancelling the main subscription

Spaniards with subscriptions are moderately price-sensitive: 35.5% would start considering cancellation with an increase of between 6% and 10%, and 19% would already do so with an increase of only 1% to 5%. A further 14.7% would cancel with any increase

Millennials are the most sensitive to increases of 6-10% (46.5%). Gen X and Boomers show greater relative tolerance, with higher percentages in the “depends on the service / I don’t know” category (10.6% and 12.6%, respectively), suggesting a less reactive attitude towards price changes among older Spaniards



Base : subscribers, 736 interviews

P11. From what price increase would you start considering cancelling your main subscription?

▲ Significantly higher differences are compared with the total sample
▼ Significantly /lower differences are compared with the total sample

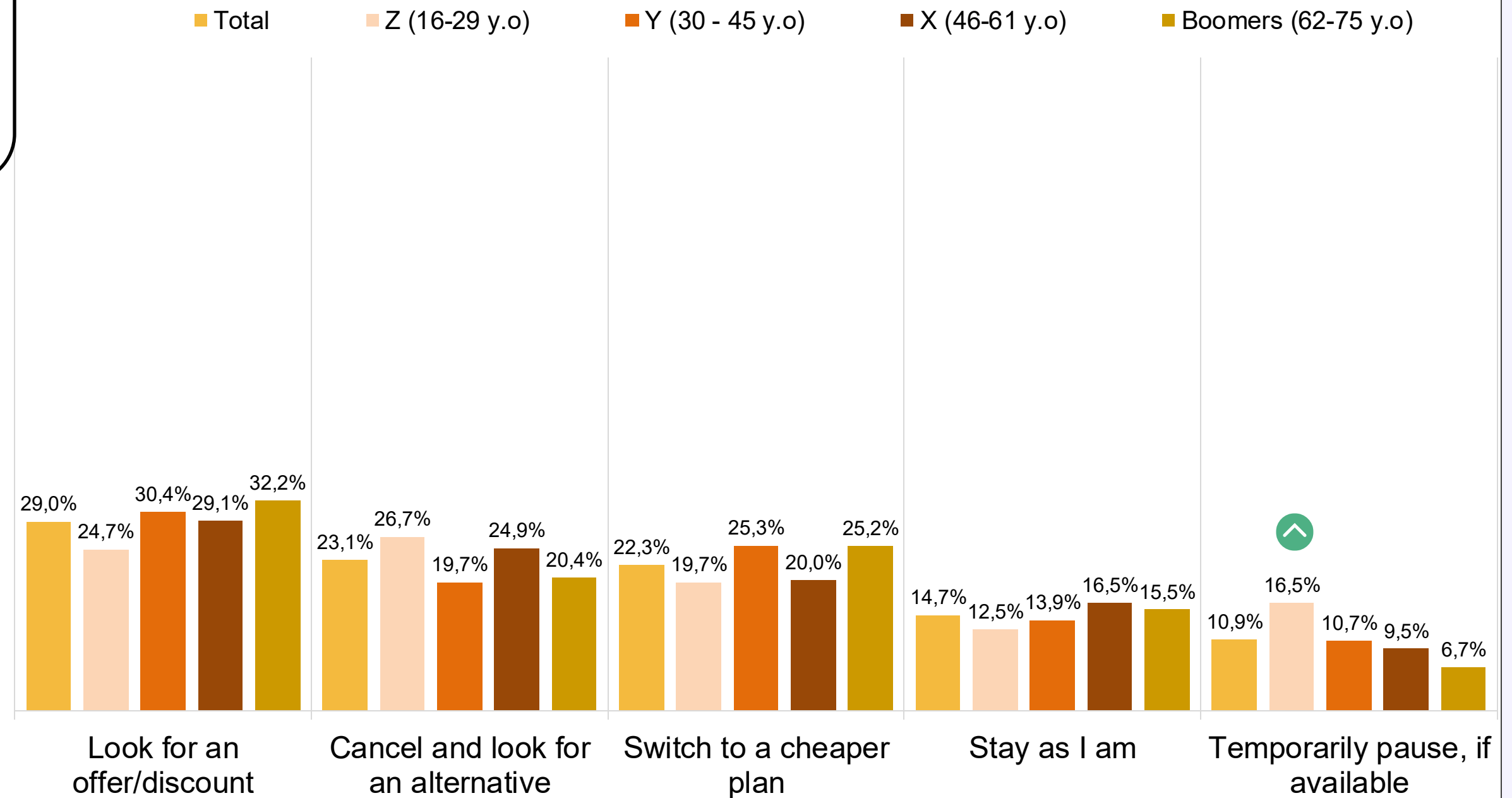
What people would do if the price of their main subscription increased



Faced with a price increase in their subscriptions, Spaniards' first reaction would be to look for an offer or discount (29%), followed by cancelling and looking for an alternative (23.1%) and switching to a cheaper plan (22.3%). Only 14.7% would stay as they are

Gen Z is the most likely to temporarily pause the subscription if that option exists (16.5%), while Boomers stand out for looking for an offer or discount (32.2%). Gen X is the generation most likely to stay as they are (16.5%), reflecting greater loyalty among middle-aged subscribers

Base : subscribers, 736 interviews



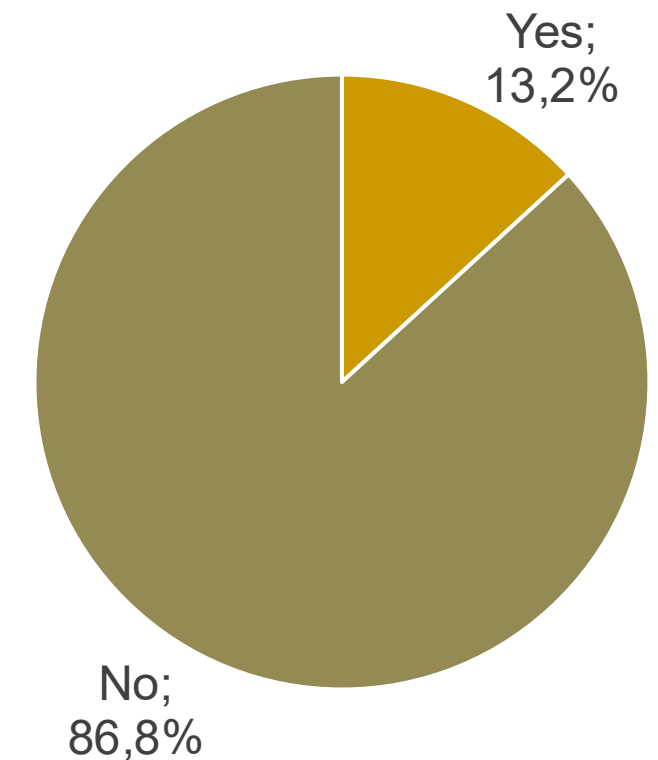
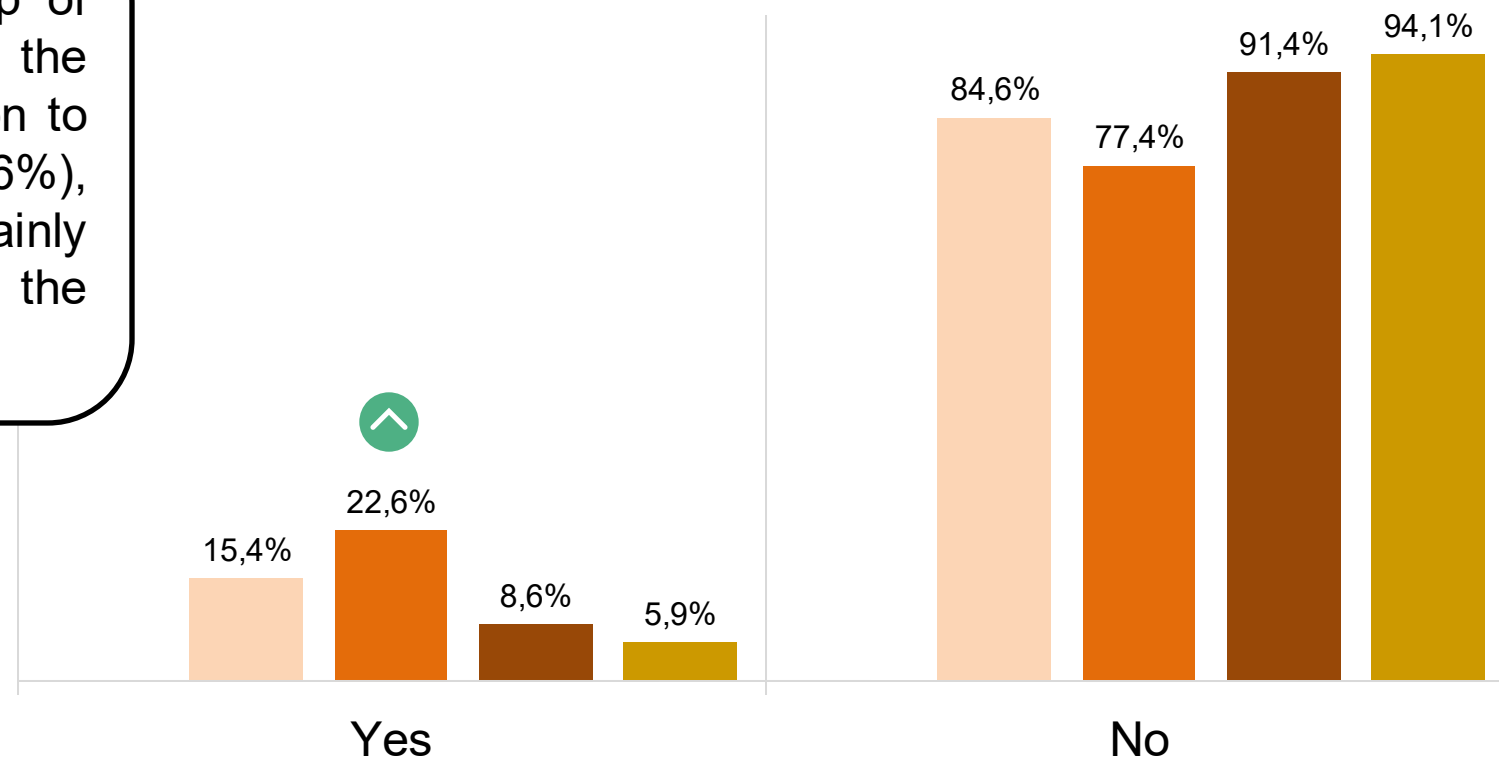
P12. If the price of the subscriptions you are already signed up to increased, what would you do first?

▲ Significantly higher differences are compared with the total sample
▼ Significantly /lower differences are compared with the total sample

Intention to subscribe in the next 6 months

Among Spaniards who currently have no subscriptions, intention to subscribe in the short term is low, as only 12.9% say they intend to do so

■ Z (16-29 y.o) ■ Y (30 - 45 y.o) ■ X (46-61 y.o) ■ Boomers (62-75 y.o)



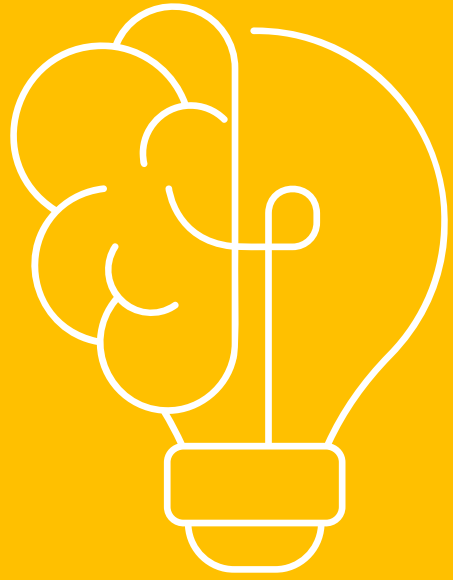
Millennials are the most likely to take the step of subscribing in the next 6 months (22.6%). At the opposite end, Boomers show the lowest intention to subscribe (5.9%), followed by Gen X (8.6%), confirming that attracting new subscribers will mainly depend on capturing younger segments of the population

Base non subscribers: 264 interviews

P13. Do you intend to subscribe in the next 6 months?

⬆ Significantly higher differences are compared with the total sample
 ⬇ Significantly lower differences are compared with the total sample

Conclusions



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Conclusions

Key Data



The subscription model is consolidated, but led by entertainment

Three in four Spaniards (73.3%) have at least one paid subscription, with an average monthly spend of EUR30. Streaming for series, films and sport dominates the market (72.4%), followed at a considerable distance by music (37.3%) and video games (15%). Gen Z is the most subscribed and diversified segment, while Boomers, although they have fewer subscriptions, concentrate their spending on a small number of services with higher unit value and use them more intensively (81.4% heavy users)

Usage is high, but churn is growing among younger consumers

A total of 70.8% of Spaniards with subscriptions use them intensively (“heavy”). However, churn is an increasing reality: 34.8% have cancelled at least one subscription in the last 6 months, rising to 51.9% among Gen Z. The main reasons for cancellation are low usage (27.2%), high price (18.9%) and having found a better alternative (13.9%). Boomers are the most loyal, with 82.9% reporting no cancellations in the period analysed

Price is the major conditioning factor: low tolerance for increases

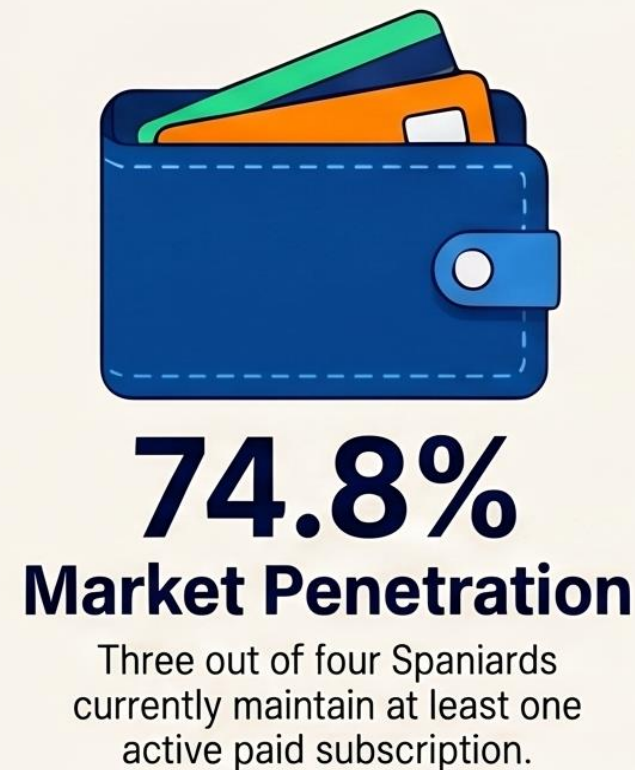
Spaniards are moderately price-sensitive: 35.5% would start considering cancellation with an increase of between 6% and 10%, and 14.7% would do so with any increase. If prices rise, the first reaction would be to look for an offer (29%), cancel and look for an alternative (23.1%) or switch to a cheaper plan (22.3%). A price reduction is also the main retention factor (53%), far ahead of any other lever. More than half (52.3% Top 2 Box) would prefer to concentrate their spending on 1-2 top subscriptions rather than spread it across many small ones

Intention to take out new subscriptions is low, and the future depends on younger generations

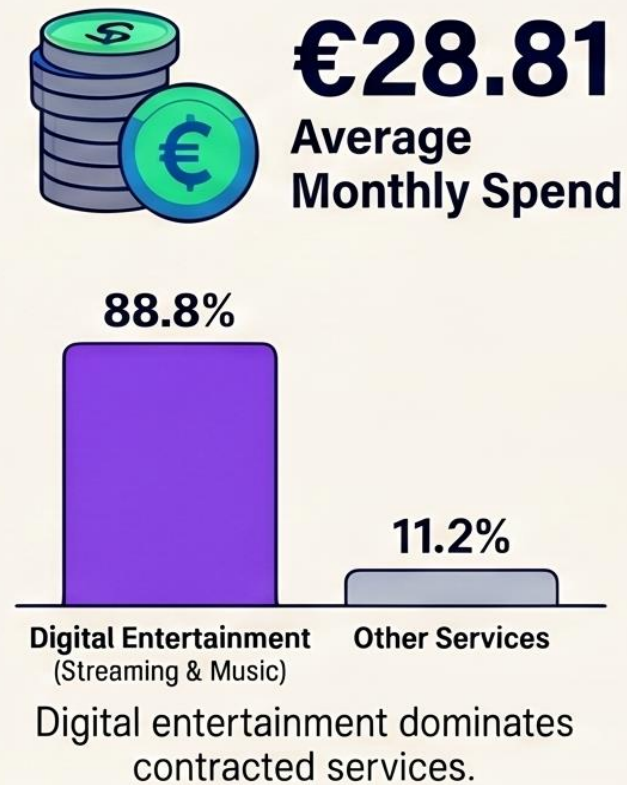
Among Spaniards without subscriptions, only 12.9% intend to take one out in the next 6 months, with Millennials showing the greatest interest (22.6%), followed by Gen Z (15.4%), while Boomers (5.9%) and Gen X (8.6%) barely consider it. The overall saturation level is moderate (average 3.92/10), but significantly higher among Gen Z and Millennials (4.47 and 4.66), indicating that market growth in Spain will depend on platforms’ ability to differentiate themselves, deliver real value and contain prices.

Spain's Subscription Landscape 2026: Loyalty vs. Churn

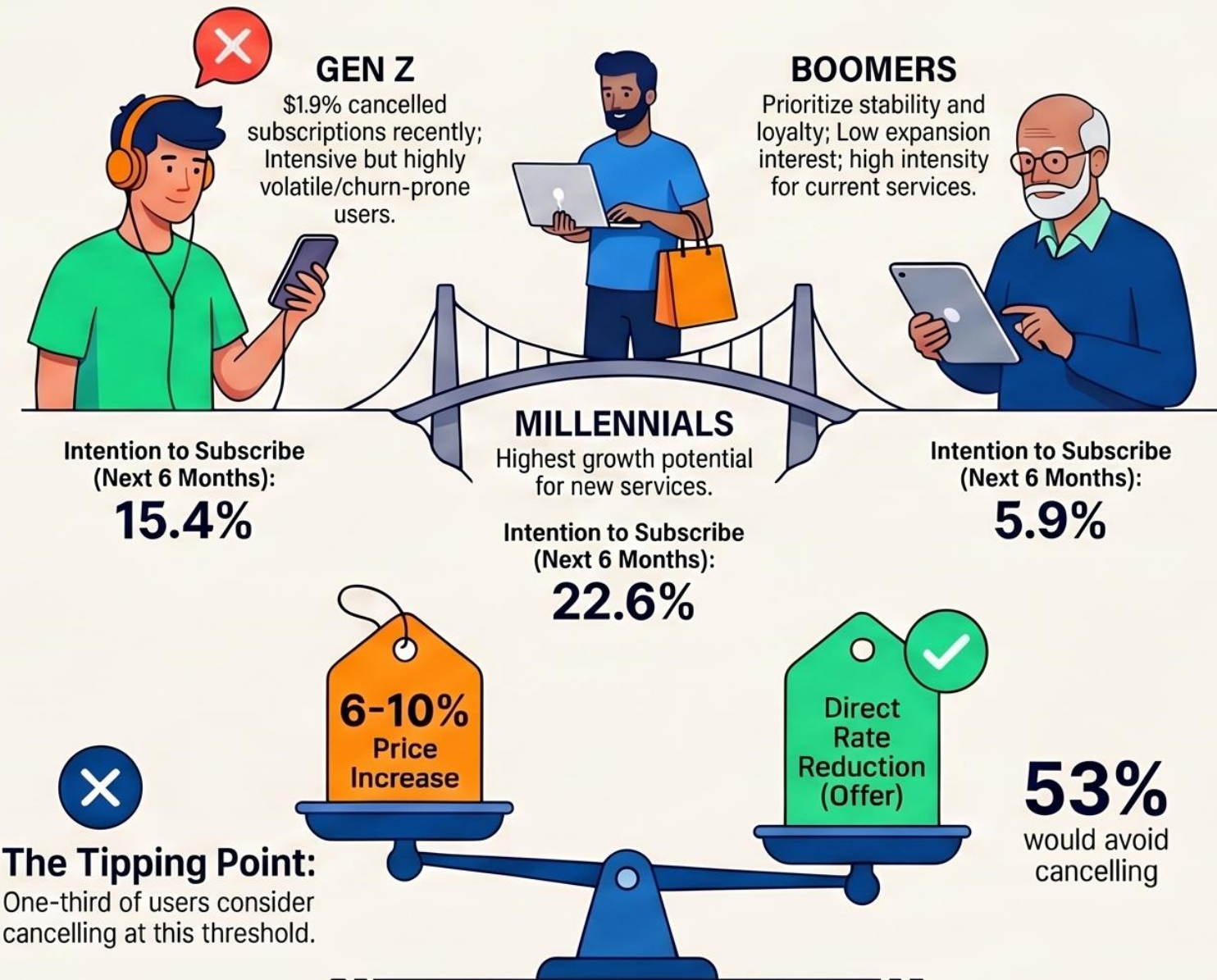
MARKET CONSOLIDATION



Consolidation Over Diversification:
52.3% of users prefer paying for 1-2 "top" services rather than many smaller ones.



FIDELITY DYNAMICS



Thank you



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