

SPAIN: INTRIGUE AS A NARRATIVE ENGINE

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Introduction

The “return to normality” is evident in the decrease in television consumption and the increase in advertising investment, in a year in which the two large private networks (Tele5 and Antena3) revalidate their leadership and the public network (La1) falls to an all-time low. As expected, the expansion of streaming has reduced the number of premieres of own fiction on state channels, which have in turn diversified their programming strategies for the sake of competitiveness: premiere of the first installment on free-to-air and broadcast of the rest in VoD, renewal of its platform in the case of TVE, etc. The relevance of the thriller, which has completed its hybridization with the rest of the genres, and the high number of titles that debut their first season, are two of the most outstanding features of Spanish fiction in 2021.

1. The audiovisual context of Spain in 2021

The weighted annual audience index of the three large generalist networks (37.5%, +1.7 points more than last year) rises, after an all-time low in 2020, and obtains its best figure since 2015. Pay television reaches a new record (8.6%, +0.2), surpassing the regional ones (8.4%, +0.2). The return to the “new normal” after the pandemic recovers the downward trend in television consumption, while advertising investment experiences a significant increase.

1.1. Open television in Spain

The two main private television channels, Tele5 and Antena3, obtain their best results since 2009, showing the strength of their offer by adding 2.3 points this year, the highest joint growth since 1993. On the contrary, the first public station, La1 reaches a new historic low. The accumulated index of the specialty channels (DTT) also highlights its negative trend (27.4%, 1.3 points less than the previous year) as a

consequence of the results of FDF, Neox and children's channels (Clan, Boing and Disney Channel), which reached their lowest in the last decade.

Table 1. National open television channels in Spain

Ownership	Public Stations (14)		Private Stations (10)	
State (national coverage) ¹	First channel	Second channel	First channel	Second channel
		A1	A2 24H Clan Telesport	Antena3, Four, LaSexta , TV 5
Autonomic (regional coverage)	Á punt , Aragón TV, CanalSur , CMM, ETB1, ETB2, C. Extremadura, IB3, La 7TV, Telemadrid, TPA, TV3, TVCAN, TVG	3/24, And-TV, CSur - And, Esport3, ETB3, ETB4, Galicia TV, IB3 Global, LaOtra , Super3/33, Telemadrid Int , TPA2, TV3CAT, TVG2	8Madrid, 8TV, BOM Cine, HitTV , La7, La8, Mediterranean TV, Rac 105	
TOTAL STATIONS = 24 TOTAL CHANNELS = 62				

Source: Obitel Spain

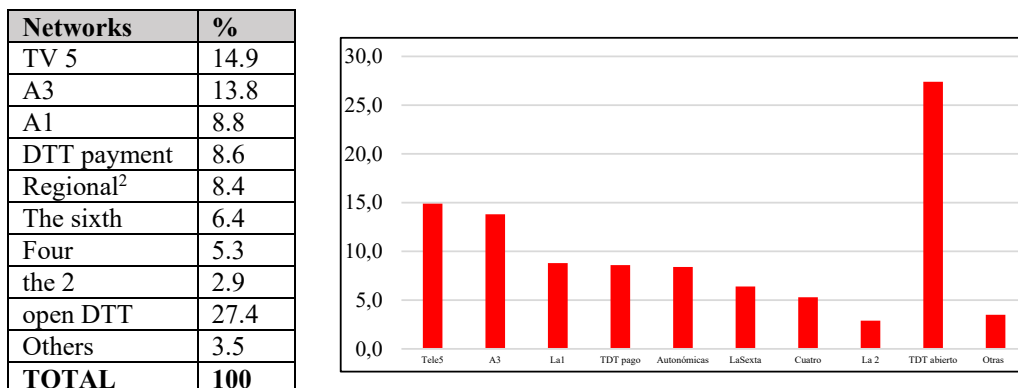
In 2020, television consumption broke a historical record at the height of an unusual moment that, over the months, gave way to the “new normality” and the recovery of the negative trend of the previous two years (2018 and 2019). In 2021 it fell 26 minutes compared to 2020, with 214 minutes per person per day, a figure practically identical to that of 2003. Now, it should be noted that the measurement of viewing consumption on television with “hybrid” capacity, which in the jargon of audience measurement is called “Other uses of television”: Internet, play, video games and DTT-type radio (Digital Terrestrial Television), adds 30 minutes in 2021, one more than in 2020. Thus, the total time of reception through “television” has reached 244 minutes, a figure identical to that of 2013, and the second year of highest television consumption in Spain. This is not a decline per se, but rather a segmentation and/or diversification, since linear viewing is compensated by the increase in hybrid audiovisual consumption.

For the tenth consecutive year, Tele5 has been the most watched channel (14.9%, +0.3), followed by Antena3 (13.8%, +2) on the rise during the last months of the year. La1 takes third position, with an annual historical minimum (8.8%, -0.6) as a consequence of the drop in its news programs and an increasingly disparate offer in prime time. LaSexta (6.4%, -0.6) once again surpassed Cuatro (5.3%, -0.1), which

¹Translator note: In the Spanish case, “state coverage” or “national coverage” refer to networks that reach the whole country, while “autonomic coverage” refers to networks with regional coverage of their own Autonomic Communities. Both autonomic and state networks include public and private ownership.

obtained the worst number in its history. On the contrary, La2 achieves its best result since 2010 (2.9%, +0.1).

Graph 1. share by state channels



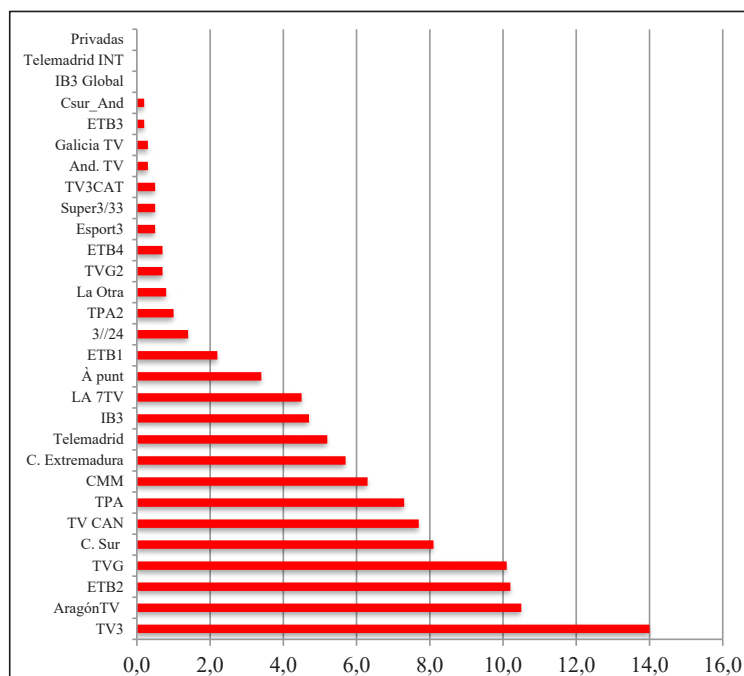
Source: Barlovento Comunicación/KantarMedia.

Public regional channels grow two tenths in 2021 (8.4%), their best result since 2013. This is the consequence of an increase of the channels as a group since 2017, and of each of them in the last year: ETB obtains its best results since 2009; CMM TV, TPA Asturias and TV Canaria, since 2011; Aragon TV, since 2014; TV Galicia, since 2017 and La7 and À Punt set new records. Yet again, TV3 (14%) is the channel with the highest audience share and confirms its leadership in Catalonia for the twelfth consecutive year. On the contrary, the group of private regional channels obtained a new annual minimum (0.3%, -0.1).

² Integrated in FORTA (Federation of Autonomous Radio Television Organizations).

Graph 1a. share by regional networks

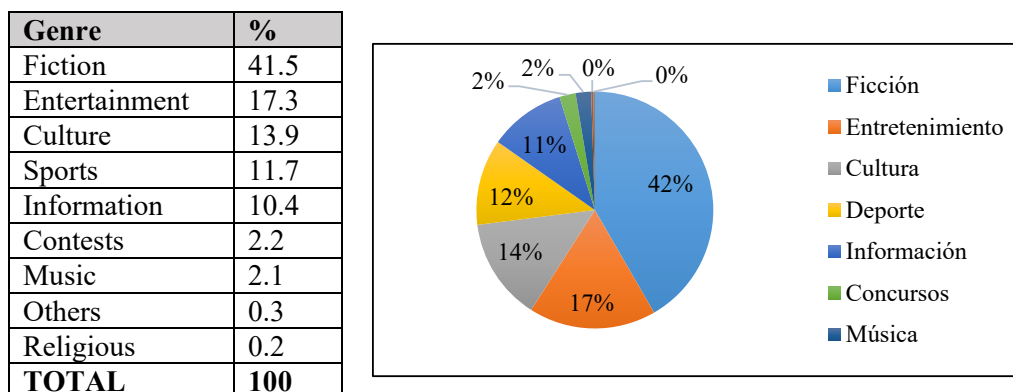
Chains	%
TV3	14
AragonTV	10.5
ETB2	10.2
TVG	10.1
C. South	8.1
CAN-TV	7.7
TPA	7.3
CMM	6.3
C. Extremadura	5.7
telemadrid	5.2
IB3	4.7
LA 7TV	4.5
on point	3.4
ETB1	2.2
3//24	1.4
TPA2	1
The other	0.8
TVG2	0.7
ETB4	0.7
esport3	0.5
Super3/33	0.5
TV3CAT	0.5
And. TV	0.3
Galicia TV	0.3
ETB3	0.2
Csur_And	0.2
IB3Global	0
Telemadrid INT	0
private	0
TOTAL	100



Source: Barlovento Comunicación/KantarMedia.

The leadership by business groups belongs, once again, to Mediaset (28.2%, -0.2), followed by Atresmedia (27.3%, +1). The audience share of both leaders represents more than half of the total (55.6%), eight tenths above 2020. RTVE reaches another historic low (14.5%, -0.9); while FORTA adds one tenth (8.2%); Unidad Editorial grows (2.6%, +0.1); and Vocento continues to fall (2.3%, -0.3).

Fiction falls back compared to 2020, but it continues to be the genre with the greatest presence in all the channels (41.5%, -0.8), mainly in the national ones, both free-to-air (41.2%) and paid (54.5%). Next, and following the same order as last year, are entertainment (17.3%, -0.5), culture (13.9%, +0.2), sport (11.7%, +0.9) and information (10.4%, +0.6).

Graph 2. Genres in TV programming

Source: Barlovento Comunicación/KantarMedia.

In economic terms, 2021 was a year of recovery for the three main audiovisual groups. RTVE plans to close the 2021 financial year with an estimated profit of 46 million euros. Its commercial income reaches 60 million euros, levels of historical maximums with the current financing model; while the debt was 40% lower than the budgeted figure³. Mediaset obtained 181 million net profit in 2021, 1.3% more than in 2020⁴; while Atresmedia's profit was 118.5 million, which implies an increase of 397% compared to the previous year.⁵

1.2. Pay TV and VoD platforms in Spain

DTT drops one point compared to the previous year (73%). However, it continues to be the main television content distribution system in Spain. Once again, leads with an all-time low as a result of the increase in subscriptions to pay television (IPTV, cable or satellite), which sets a new record (27 %, +0.6) thanks to the increase of IPTV (17%, +1).

In September 2021, there were 8,349,129 households subscribed to some form of pay television⁶, 4.7% more than in the same period of the previous year. However, in the first nine months of the year, its revenues fell by 5.9% (1,488.96 million euros), while those of free-to-air television increased by 15.7% (1,086.07 million).⁷

Specialty pay channels have grown two tenths compared to the previous year and set a new record: 8.6%. It is a television modality that has not stopped adding viewers since 2013. Among the ten most watched pay channels are TNT, which

³ <https://www.rtve.es/rtve/20220201/rtve-cerrara-ejercicio-2021-beneficio-provisional/2277281.shtml>

⁴ https://www.mediaset.es/comunicacion/corporativo/mediaset-resultados-economicos-2021_18_3287824577.html

⁵ <https://www.atresmediacorporacion.com/accionistas-inversores/informacion-economico-financiera/presentaciones-sobre-resultados/>

⁶ http://data.cnmc.es/datagraph/jsp/inf_trim.jsp

⁷ Ibid.

premiered *Maricón Perdido* in 2021, and Comedy Central which, although it does not have its own fiction, reruns national productions such as *Camera Café* and *La que Se Avecina*.

Table 2. Pay television channels in Spain

10 most watched pay TV channels in Spain			
Channel	Genre	Source	% Pay ⁸
Movistar Laliga	Soccer	Spain	6.9
Fox	Fiction	USA	3.4
AXN	Fiction	USA	3.3
13TH Street	Fiction	USA	3.3
#Let's go	Sports	Spain	3.1
TNT	Fiction	USA	2.9
Hollywood Channel	Cinema	USA	2.4
ComedyCentral _	Comedy	USA	2.1
History Channel	Documentaries	USA	1.8
AMC	Fiction	USA	1.8

Source: Barlovento Comunicación / KantarMedia

Table 3. VoD in Spain

VoD Platforms in 2021 ⁹
Netflix, Amazon Prime Video, Movistar+ and Movistar+ Lite, HBO, Disney+, Apple TV, Rakuten, DAZN, Vodafone TV, Orange TV, Starzplay , Pluto TV, Filmin , FlixOlé , fuboTV , Atresplayer Premium, Mitele Plus, LOVEStv , RTVE Play
TOTAL: 20

Source: Obitel Spain

1.3. Independent producers of TV fiction

The production companies with the greatest number of television fiction premiere hours were, in 2021, Diagonal TV (17.2% and 322 hours), Plano a plano (12.6% and 235 hours), Bambú (11.4% and 214 hours), Mascaretfilms (11.4% and 214 hours) and Zebra Producciones (5.8% and 108 hours)⁹. Regarding OTT platforms, leading the ranking we find Zeta Studios (five titles and 19 hours), Buendía Estudio (four

⁸ Percentage of the channel's screen share in relation to pay television as a whole.

⁹ https://www.geca.es/geca/informes/20220105-Informe%20Produccion_df.pdf

titles and 20 hours), Boomerang TV (three titles and 23 hours), Bambú (three titles and 13 hours) and Globomedia (three titles and 20 hours).¹⁰

In January 2021, Unicorn Content inaugurated a new area dedicated to television fiction by veteran director and executive producer Begoña Álvarez Rojas. At the same time, the production company Onza announced the start of its international expansion with the launch of Onza Américas, its new Miami-based subsidiary for the Latin American and US Hispanic markets. For their part, Javier Calvo and Javier Ambrossi launched Suma Content in October, the evolution of Suma Latina, their first independent production company. Finally, Netflix plans to open in Spain, in 2022, five new sets and new post-production facilities (filming laboratory and state-of-the-art editing rooms).

1.4. Sources of financing for the audiovisual sector

Advertising investment corrects its trajectory with the reactivation of the economy. In television it increased by 8.3%, reaching 1,776.2 million euros (1,640.3 in 2020). The advertising investment of the free-to-air national television group grew by 8.7% (1,586.1 million), placing its market share at 89.3% (+0.3). That of the group of regional and local televisions also increased: 11.1% (88.1 million) and 13.1% (2.3 million) respectively. Thus, the former obtains a market share of 5% (+0.2) and the latter 0.1% (the same as in 2021). On the other hand, pay channels decreased by 0.1% in 2021 (99.7 million), placing their share at 5.6% (-0.5).¹¹

Mediaset and Atresmedia groups maintain their advertising strength and grow in 2021. The former reached 767 million euros, which translates into a growth of 8.2% and a market share of 43.2%. Atresmedia places its advertising turnover at 718 million, that is, an increase of 9.4% and a share of 40.4% (+0.4).¹²

1.5. Communication Policies

The Secretary of State for Telecommunications and Digital Infrastructures has introduced modifications to its Draft of the General Audiovisual Communication Law to change the RTVE Financing Law. The new draft bill will see RTVE financed by all the agents present in the audiovisual market that compete for the same audience, which includes video-on-demand providers and video-sharing platforms. Thus, companies such as Netflix or YouTube will have to dedicate 1.5% of their income in Spain to RTVE, half of what Spanish private channels are required by law. A comparative offense that the Union of Open Commercial Televisions (UTECA) has already denounced. UTECA also rejects other measures that have only been imposed on national platforms: a strict regulation on catalog quotas in the three

¹⁰ https://www.geca.es/geca/informes/20220105-Informe%20Produccion_ott_def.pdf

¹¹ <https://www.infoadex.es/home/wp-content/uploads/2022/03/Presentacion-Estudio-InfoAdex-de-la-Inversion-Publicitaria-2022.pdf>

¹² Ibid

co-official languages, single protection bands for minors and a tightening of the sanctioning regime. Finally, the modified text also enables new sources of income for RTVE through certain promotions: sponsorships and advertising on its international channels and digital content.

1.6. Digital and mobile connectivity infrastructure

This year has seen the launch of RTVE Play, RTVE's new platform, which replaces and improves its "A la carte" service. Play not only enhances RTVE's vast catalogue, but also seeks to compete as an autonomous platform with exclusive content and titles that until now were only accessible on paid services. The platform also has improvements in accessibility and new features, including the preview of some of its original content, such as the series *HIT*, a few hours before its free-to-air broadcast. All this without registration and with free access in a market that is constantly increasing its prices.

The regional public channel CanalSur also launched its free OTT platform in 2021, "CanalSur Más"; while EITB has already announced the launch of its OTT for 2022, a "Basque Netflix" to broadcast production and content in Basque.

2. Analysis of the year: national and Ibero-American premiere fiction in 2021

Spanish premiere fiction continues to rise, as in recent seasons, boosted by the deployment of OTTs, with a total of 81 titles: 30 on free-to-air channels (13 state and 17 regional) and 51 as VoD. The number of premieres of Ibero-American fiction continues to decline, as Turkish soap operas also reach regional channels that have the largest production of their own fictional programming. Thus, after the success of *Mujer, Mi Hija* and *Tierra Amarga* on Antena3, TV3 and TVG join this trend with *Irmáns*, the Turkish version of *This Is Us* (NBC, 2016), although the disappointing results of *Love Is in The Air* on Tele5 determined its transfer to Divinity after seven months of broadcasting.

La1 includes 10 titles this year, one more than in 2020, despite the fact that it has only replaced one of the two serials that finished this year (*Mercado Central* and *Acacias 38*). Antena3 and Tele5, on the other hand, have chosen to release almost all of their own fiction through the platforms, to the point that the only title broadcast entirely free-to-air has been the Antena3 serial *Amar Es para Siempre*.

**TABLE 1. Premiere fictions shown in 2021 on state channels
(national, foreign in the Obitel scope, and co-productions)**

PREMIERE NATIONAL TITLES	PREMIERE FOREIGN TITLES
The 1 – 10 1. <i>Cuéntame Cómo Pasó</i> (series) 2. <i>La Caza. Tramuntana</i> (series) 3. <i>Mercado Central</i> (serial) 4. <i>HIT</i> (series) 5. <i>Leonardo</i> (series) 6. <i>Estoy Vivo</i> (series) 7. <i>Ana Tramel. El Juego</i> (series) 8. <i>Acacias 38</i> (serial) 9. <i>Servir y Proteger</i> (serial) 10. <i>Dos Vidas</i> (serial)	Fox TV – 1 1. <i>Llámame Bruna</i> (telenovela-Brasil)
Antena3 – 2 11. <i>Amar Es para Siempre</i> (serial) 12. <i>Los Hombres de Paco*</i> (series)	Nova – 4 2. <i>Betty en Nueva York</i> (telenovela- EE. UU.-Hispanic) 3. <i>Caer en la Tentación</i> (telenovela-Mexico) 4. <i>Te Doy la Vida</i> (telenovela-Mexico) 5. <i>Vencer el Desamor</i> (telenovela-Mexico)
Tele5 – 1 13. <i>El Pueblo**</i> (series)	
CO-PRODUCTIONS 1	CO-PRODUCTIONS 0
	Total premiere titles OBITEL 18

Source: Obitel Spain

* Antena3 only aired the premiere episode and then continued on Atresplayer.

** Tele5 only aired the premiere episode and then continued on Amazon Prime Video.

Regional fiction shows its resilience in an increasingly competitive environment, with a total of 17 titles (one less than in 2020). In addition to the seven premieres on TV3, this year there is a comedy on K33, the second Catalan public television channel: *X, La Sèrie*, an original audiovisual collage that mixes fiction and reality to caricaturize the patriarchal world. Also noteworthy is the broadcast on the Valencian channel À Punt of the twelfth season of *L'Alqueria Blanca*, the popular series aired by Canal Nou from 2007 until its finale in 2013.

The decrease in the number of TVG titles is due to the launch on Netflix and HBO Max of the new seasons of its thrillers *El Sabor de Las Margaritas* and *Auga Seca* respectively, whose first seasons had been broadcast free-to-air.

**TABLE 1a. Premiere fictions exhibited in 2021 on regional channels
(national, foreign in the Obitel scope, and co-productions)**

PREMIERE NATIONAL TITLES	PREMIERE FOREIGN TITLES
<p>TV3 – 7</p> <p>1. <i>Frederica Montseny, la Dona que Parla</i> (TVmovie)</p> <p>2. <i>Moebius</i> (series)</p> <p>3. <i>Com si Fos Ahir</i> (serial)</p> <p>4. <i>Berenàveu a les Fosques</i> (TVmovie)</p> <p>5. <i>Buga Buga</i> (series)</p> <p>6. <i>La Última Nit del Karaoke</i> (series)</p> <p>7. <i>Tocats pel Foc</i> (TVmovie)</p> <p>K33 – 1</p> <p>8. <i>X, La Sèrie</i> (series)</p> <p>TVG – 3</p> <p>9. <i>Método Criminal</i> (series)</p> <p>10. <i>A Lei de Santos</i> (series)</p> <p>11. <i>Os Mariachi</i> (series)</p> <p>À PUNT – 1</p> <p>12. <i>L'Alqueria Blanca</i> (series)</p> <p>ETB1 – 2</p> <p>13. <i>Beti Muga</i> (series)</p> <p>14. <i>Go!azen</i> (series)</p> <p>IB3 – 3</p> <p>15. <i>Amor de Cans</i> (series)</p> <p>16. <i>Pep</i> (series)</p> <p>17. <i>Fúria</i> (miniseries)</p> <p>CO-PRODUCTIONS</p> <p>1</p>	<p>CO-PRODUCTIONS</p> <p>0</p> <p>Total premiere titles OBITEL 17</p>

Source: Obitel Spain

The rise of streaming in Spain influences the reruns of fictions that had been released in previous years, since the overabundance of the offer translates into modest audience results even for those series offered free-to-air after launching on the platforms. This was the case, for example, of the return of *Los Hombres de Paco* (Antena3). The re-broadcasting of the previous season of a comedy in conjunction with the current one (the repeated episode is aired after the premiere) had been a usual strategy of Tele5, although in 2021 only *El Pueblo* used it.

La1 has aired again some series from 2019 (*Malaka, Néboa, Promesas de Arena*) whose audience results had suffered due to the emergence of VoD. Antena3 recovered two of the most ambitious premieres of Atresplayer Premium in 2020, *La Cocinera de Castamar* and *El Nudo*. Tele5 offered the first episode of the second season

Señoras del (H)Ampa, previously released on Amazon Prime Video, and transferred the rest to Cuatro, Mediaset Group's second network. The latter repeated the Spanish-Italian co-production, *Los Relojes del Diablo*, after being offered on Mitele Plus.

The re-broadcasting of fictions premiered on other regional channels, which on occasion have participated in the production, is a fairly frequent practice. Interestingly, the ETB1 miniseries *Altsasu*, aired as a rerun this year on TV3, was the regional fiction with the highest audience (482,000 viewers and 18.8% share), more than two and a half points of audience share than the leader in the 2021 ranking from this group of channels, TV3's TV movie *Federica Montseny, la Dona que Parla* (376,000 viewers and 16.2% share).

The impact of VoD on Spanish television fiction is shown in the progressive decrease in the number of premieres over the last five years, as can be seen in Table 2. Especially with regard to the number of titles of state fiction, since the stability of the serials partially cushions the drop in the number of chapters/episodes and hours. Table 2a shows the lesser impact of the OTT offer on regional fiction compared to that on open state channels.

Table 2. Fiction premiere state channels

	Titles	Ch./Ep.	Hours
2017	37	1970	1454:35
2018	26	1695	1455:15
2019	24	1339	1194:15
2020	13	1145	1030:10
2021	13	913	825:30

Source: Obitel Spain

Table 2a. Fiction premiere state and regional channels

	Titles	Ch./Ep.	Hours
2017	56	2545	1941:30
2018	52	2116	1741:40
2019	43	1729	1451:25
2020	31	1398	1217:10
2021	30	1246	1035:35

Source: Obitel Spain

The migration of free-to-air television fiction to a VoD modality has been decisive in the drastic decrease in the number of series premiered in state fiction, the star format of in-house production in recent years. In 2021 and 2020, however, the same number was released (eight). The serial, on the other hand, maintains its stability throughout the five-year period with an average of five titles per year, the same number as in 2021 (four on La1 and one on Antena3).

Table 3. Formats of premiere state fiction

Format	Titles					Hours				
	2017	2018	2019	2020	2021	2017	2018	2019	2020	2021
<i>Telenovela</i>	5	4	6	5	5	819:00	942:20	997:15	969:00	754:55
Series	29	20	16	8	8	412:25	259:45	179:30	61:10	70:35
Miniseries	1	0	1	0	0	1:40	0:00	3:30	0:00	0:00
Sitcom	0	1	0	0	0	0:00	0:00	0:00	0:00	0:00
Unitary	0	0	1	0	0	0:00	1:10	0:00	0:00	0:00
Docudrama	1	0	0	0	0	220:30	252:00	0:00	0:00	0:00
TV movies	0	0	0	0	0	0:00	0:00	0:00	0:00	0:00
Others	1	0	0	0	0	1:00	0:00	0:00	0:00	0:00

Source: Obitel Spain

The decrease in series in regional fiction is also significant, although less pronounced than in state channels. This set of television channels provides 12 series to the Spanish total, which has allowed this format to stabilize compared to last year with 20 titles in both 2021 and 2020. The regional channels also provide a miniseries and four TV movies, in addition to a single serial.

Table 3a. Formats of premiere state and regional fiction

Format	Titles					Hours				
	2017	2018	2019	2020	2021	2017	2018	2019	2020	2021
<i>Telenovela</i>	8	5	7	7	6	1105:10	1051:50	1102:15	1035:50	860:55
Series	43	35	29	20	20	606:20	409:15	314:50	169:00	168:35
Miniseries	1	4	2	4	1	2:20	10:00	6:30	12:20	1:40
Sitcom	0	1	0	0	0	0:00	0:00	0:00	0:00	0:00
<i>Unitary</i>	0	1	1	0	0	0:00	1:10	0:00	0:00	0:00
Docudrama	1	2	1	0	0	220:30	252:00	14:00	0:00	0:00
TV movies	1	4	3	0	3	1:40	5:50	4:40	0:00	4:25
Others	2	6	4	0	0	5:30	11:35	9:10	0:00	0:00

Source: Obitel Spain

The 13 titles of state fiction represent 825 hours and 30 minutes, compared to an equivalent number of premieres last year that, however, accumulated 1,030 hours and 10 minutes. Like domestic fiction, the premieres of Ibero-American fiction also suffer from the expansion of VoD, with five titles (eight fewer than in 2020) and 206 hours and five minutes (350 hours and 25 minutes in 2020). The only co-production of the group, the miniseries *Leonardo* (La1), is made up of eight one-hour episodes.

Table 4. State fiction premieres: countries of origin

Country	Titles	%	Hours	%
NATIONAL (total)	13	72	825:30	80
OBITEL COUNTRIES (total)	5	28	206:05	20
Argentina	0	0	0:00	0
Brazil	1	5,5	6:40	1
Chile	0	0	0:00	0
Colombia	0	0	0:00	0
Ecuador	0	0	0:00	0
Spain	13	72	825:30	80
US Hispanic	1	5,5	91:30	9
Mexico	3	17	107:55	10
Peru	0	0	0:00	0
Portugal	0	0	0:00	0
Uruguay	0	0	0:00	0
Venezuela	0	0	0:00	0
CO-PRODUCTIONS (Total)	1	100	8:00	100
National co-productions	1	100	8:00	100
Co-productions Countries Obitel	0	0	0:00	0
TOTAL	18	100	1031:35	100

Source: Obitel Spain

State and regional fiction as a whole totals 30 titles, with 1,035 hours and 35 minutes, compared to 1,217 hours and 10 minutes in 2020. Given that only one less title was released in 2021, the difference between the broadcast times of both periods ratifies the sustained trend to reduce the number of episodes of the series, which has already been noted in previous years.

Table 4a. State and regional fiction premieres: countries of origin

Country	Titles	%	Hours	%
NATIONAL (total)	30	86	1035:35	83
OBITEL COUNTRIES (total)	5	14	206:05	17
Argentina	0	0	0:00	0
Brazil	1	3	6:40	1
Chili	0	0	0:00	0
Colombia	0	0	0:00	0
Ecuador	0	0	0:00	0
Spain	30	86	1035:35	83
US Hispanic	1	3	91:30	7
Mexico	3	9	107:55	9
Peru	0	0	0:00	0
Portugal	0	0	0:00	0
Uruguay	0	0	0:00	0
Venezuela	0	0	0:00	0
CO-PRODUCTIONS (Total)	2	100	14:00	100
National co-productions	2	100	14:00	100
Co-productions Countries Obitel	0	0	0:00	0
TOTAL	35	100	1241:40	100

Source: Obitel Spain

The quantity and quality of Spanish television fiction production, which has increased the rivalry of the always competitive Spanish system, has led Antena3 to rescue some of its iconic titles from the past, updated and adapted to current trends: *Física o Química: El Reencuentro* in 2020; *El Internado. Las Cumbres*, *Los Protegidos* and *Los Hombres de Paco* in 2021. Unlike the first three productions, Antena3 offered the premiere episode of *Los Hombres de Paco* free-to-air and obtained a screen share of 19.5% (2,673,000 viewers), a figure surprisingly close to the average share of the 127 episodes of the series broadcast between 2006 and 2011. A milestone in the era of sustained decline in the average audience on free-to-air networks, as evidenced by the 1,667,000 viewers (9.9% share) of the second most watched title this year, the long-running series by La1 *Cuéntame Como Pasó*. That is a considerable distance from the more than seven million people it reached in some of its broadcasts during the first decade of 2000.

The second season of the teen series *HIT* (La1) occupies the seventh place in the *Top 10* of 2021, compared to the fourth place obtained by its first installment last year. Something similar to what happened with the police show *La Caza. Tramuntana* (La1), which occupies the fourth place in the ranking, instead of the third obtained in its debut in 2019 (*La Caza. Monteperdido*). On the contrary, the audience results of the two serials amongst the 10 most watched programs of 2021, *Amar Es*

Para Siempre (Antena3) and *Mercado Central* (La1) confirm the stability of this format, which is not forced to compete with the VoD.

Tele5's only contribution to free-to-air fiction, *El Pueblo*, followed the same programming schedule as *Los Hombres de Paco* (Antena3), although the only episode offered by the network before moving to Amazon Prime Video takes the fifth place in the ranking. Curiously, the only episode of this fiction offered free-to-air in 2020 topped the *top ten* with 2,199,215 viewers and a share of 16.3%, more than three points below the aforementioned episode of *Los Hombres de Paco*, which leads 2021.

The only title of the 10 most watched in state fiction that debuted in 2021 was the thriller *Ana Tramel. El juego* (La1), an intriguing story set in the world of gambling addiction and starring Maribel Verdú.

Table 6. 10 most watched national titles of state fiction

	Title	Channel	Producer (Country)	Format/genre	chap./ ep . 2021	Time zone	Rating	Compartir	Thousands
1	<i>Los Hombres de Paco</i>	Antena3	Globomedia	Series/police	1	Prime-time	6	19.5	2,673,000
two	<i>Cuéntame Cómo Pasó</i>	La1	Grupo Ganga Producciones, RTVE	Series/dramedy	20	Prime-time	3.7	9.9	1,667,600
3	<i>Amar Es Para Siempre</i>	Antena3	Diagonal TV	Series/drama	261	Afternoon	2.7	11.6	1,221,368
4	<i>La Caza. Tramuntana</i>	La1	DLO Producciones	Series/thriller	8	Prime-time	2.7	6.9	1,190,250
5	<i>El Pueblo</i>	Tele5	Contubernio	Series/comedy	1	Prime-time	2.5	10.3	1,136,000
6	<i>Mercado Central</i>	La1	Diagonal TV, RTVE	Series/drama	13	Afternoon		8.1	1,016,538
7	<i>HIT</i>	La1	RTVE, Ganga	Series/drama	10	Prime-time		7.6	1,006,700
8	<i>Leonardo</i>	La1	Rai Fiction, Lux Vide, Sony Pictures Entert., Big Light Productions, Alfresco Pictures, France TV, RTVE	Series/drama	8	Prime-time	2.2	7.1	991,250
9	<i>Estoy Vivo</i>	La1	RTVE, Globomedia	Series/police	13	Prime-time	2.2	5.9	961,000
10	<i>Ana Tramel. El Juego</i>	La1	RTVE, Tornasol Media, DeAPlaneta, Ana Tramel. La serie A.I.E, ZDF Enterprises	Series/thriller	6	Prime-time	2	7.2	883,667
Total national productions: 10				Foreign original scripts: 0					

Source: Obitel Spain

The predominance of TV3 fictions in the regional ranking is evident, with seven of the 10 most watched titles of 2021. As mentioned before, the Catalan network has once again opted for TV movies, absent in 2020, with three dramas that have obtained a disparate audience: *Frederica Montseny, la Dona que Parla*, *Berenàveu a les Fosques* and *Tocats pel Foc*. The long running *L'Alqueria Blanca* has placed fourth in the ranking, with 249,000 viewers (8.8% share), a spectacular increase from the 61,000 viewers (4.7% share) obtained the year of its return (2019).

As happens with the serials of the state channels, *Com si Fos Ahir* underpins its audience results on TV3 with 257,000 (17.1% share), compared to 258,000 viewers (16.3% share) in 2020. On the other hand, the Catalan network has not been as lucky with the first season of its two only comedies in the ranking, *Buga Buga* and *L'Última Nit del Karaoke*, whose modest results also point to the rise of VoD.

TVG's agreements with OTTs have limited the number of titles offered free-to-air, which places its thrillers *Método Criminal* and *A Lei de Santos* in the last two positions of the annual ranking.

Table 6a. 10 most watched national titles of regional fiction

Title		Channel	Producer (Country)	Format/genre	chap./ ep . 2021	Time zone	Rating	Compartir	Thousands
1	<i>Frederica Montseny, la Dona que Parla</i>	TV3	Distinto Films	TVmovie/drama	1	Prime-time	5.1	16.2	376,000
2	<i>Moebius</i>	TV3	Veranda TV, TVC	Series/thriller	10	Prime-time	5	15.4	369,000
3	<i>Com si Fos Ahir</i>	TV3	TVC	Series/drama	212	Afternoon	3.5	17.1	257,000
4	<i>L'Alqueria Blanca</i>	A punt	Trivisión	Series/drama	18	Prime-time	3.4	8.8	249,000
5	<i>Berenàveu a les Fosques</i>	TV3	NewCo Audiovisual	TVmovie/drama	1	Prime-time	2.9	11.7	215,000
6	<i>Buga Buga</i>	TV3	Aguacate & Calabaza	Series/comedy	6	Prime-time	2.4	9.7	177,000
7	<i>L'Última Nit del Karaoke</i>	TV3	El Terrat	Series/comedy	10	Prime-time		8.9	169,000
8	<i>Tocats pel Foc</i>	TV3	Impulsafilm, Zabriskie Films	TVmovie/drama	1	Prime-time	0.9	6.9	69,000
9	<i>Método Criminal</i>	TVG	Voz Audiovisual	Series/thriller	21	Prime-time	1.7	5.9	44,000
10	<i>A Lei de Santos</i>	TVG	Voz Audiovisual	Series/thriller	8	Prime-time	1.1	4.8	29,000
Total national productions: 10				Foreign original scripts: 0					

Source: Obitel Spain

3. VoD Monitoring 2020

The digital platforms offering and their offer of national fiction have continued to increase throughout 2021. On the other hand, the addition of new subscribers slows down, despite the intensification of competition. The 51 titles released this year in the VoD modality show the rise of Spanish fiction in streaming.

3.1. VoD Platform Market in 2021

In 2021 the competition intensified with the entry of new players. In February Disney Star and Hayu, the NBCUniversal International reality platform landed; while HBO Max arrived in October, updating the HBO offer, but without changing the subscription pricing. Some already consolidated OTTs took advantage of 2021 to improve their positioning. Pluto TV, for example, increased its offer with 6 channels; while Vodafone TV included Disney+ in its offer, betting on fiction without soccer. Movistar+, for its part, closed an alliance with Amazon Prime Video and integrated it into its catalog.

In the absence of official figures provided by the companies themselves, different consultants offer data on subscriptions to payment platforms in Spain. According to the results of the fourth wave of 2021 of the barometer of the OTT and pay TV market carried out by Barlovento Comunicación, Netflix is the most used platform (60%), followed by Amazon Prime Video (53.7%), HBO (26.4%), Disney+ (21.4%) and Movistar+ (20.3%). The fictions that have attracted the most subscribers to Netflix and Amazon Prime Video are *La Casa de Papel* and *La que Se Avecina*, both Spanish¹³. According to the third wave of the General Media Study (EGM), Netflix also appears as the first option (21 million users); followed by Amazon Prime Video (13M), Movistar+ (8.5M), HBO (6M) and Disney+ (5M)¹⁴. The results of the 10th edition of the OTT Barometer of the Audiovisual Communication Studies Office (GECA) corroborate the first two positions: Netflix continues to be the platform with the most registrations by Spanish users (73.1%), followed by Amazon Prime Video (69.9%). Movistar+ appears as the third option (29.8%), relegating Disney+ (29.2%) and HBO (21.4%) to fourth and fifth respectively.¹⁵

3.2. Offer of local VoD platforms in 2021 (national, regional within the country)

Movistar+ is in the top five of the three aforementioned rankings. In contrast, the rest of the Spanish telephone companies OTTs' have a very limited market penetration (Esuskatel: 1.4%; Telecable: 1% and Yoigo: 0.6%)¹⁶. Mitele Plus closed 2021

¹³<https://www.barloventocomunicacion.es/wp-content/uploads/2021/12/BAROMETRO-TV-OTT-Avance-4-ola-2021.pdf>

¹⁴ <https://www.barloventocomunicacion.es/wp-content/uploads/2022/01/2021-ANALISIS-TELEVIVO-BARLOVENTO-COMUNICACION-1.pdf>

¹⁵<https://www.panoramaaudiovisual.com/2021/10/22/barometro-ott-geca-disney-plataforma-trimestre/>

¹⁶<https://www.barloventocomunicacion.es/wp-content/uploads/2021/12/BAROMETRO-TV-OTT-Avance-4-ola-2021.pdf>

with 207,000 subscribers, while Atresplayer Premium reached 427,000, more than double that of Mitele Plus ¹⁷, partly as a result of its wide fiction offering.

For cinema, the most popular Spanish platforms are FlixOlé (0.5%) and Filmin (3.8%), which in 2021 started producing fiction with *Doctor Portuondo*. It should also be mentioned that Netflix and Amazon Prime Video have joined the Council of the Academy of Television and Audiovisual Arts and Sciences, with the objective of joining forces to develop joint projects and promote the Spanish audiovisual sector.

3.3. VoD analysis in 2021: national premiere fiction and co-productions

The expansion of television fiction production in Spain and its internationalization have resulted in 51 titles (47 in 2020), with a very high average quality. The series is the dominant format with 46 titles, followed by four mini-series with two to five chapters each, and one anthology, *Historias para No Dormir* (Amazon Prime Video), made up of four movies directed by filmmakers that, aside from the format, have horror as their only link.

In line with the trend of producing series structured around a central plot with a closed ending, 32 of the VoD titles have premiered their first season in 2021, three of which have also offered the second season in the same year: *By Ana Milan* and *Los Hombres de Paco*, on Atresplayer Premium, and *Sky Rojo*, on Netflix. The rest of the productions have broadcast one or two seasons of their third, fourth or fifth installment, with the exception of the long-running *La que Se Avecina* (Amazon Prime Video), on air continuously since its debut on Tele5 in 2007.

¹⁷https://www.elespanol.com/bluper/20220228/atresplayer-premium-duplica-abonados-mitele-plus-remonta/652684909_0.html

TABLE 8. National fictions and co-productions shown in 2021 on VoD

PREMIERE NATIONAL TITLES	CO-PRODUCTIONS
<p>AMAZON PRIME VIDEO – 10</p> <ol style="list-style-type: none"> 1. <i>El Cid</i> (series) 2. <i>El Internado. Las Cumbres</i> (series) 3. <i>El Pueblo</i> (series) 4. <i>Historias para No Dormir</i> (anthology) 5. <i>Jodi2</i> (miniseries) 6. <i>La que Se Avecina</i> (series) 7. <i>La Templanza</i> (series) 8. <i>Parot</i> (series) 9. <i>Pequeñas Coincidencias</i> (series) 10. <i>Señoras del (H)Ampa</i> (series) <p>ATRESPLAYER – 10</p> <ol style="list-style-type: none"> 11. <i>Los Protegidos</i> (series) 12. <i>Alba</i> (series) 13. <i>By Ana Milán</i> (series) 14. <i>Cardo</i> (series) 15. <i>Deudas</i> (series) 16. <i>Física o Química. El Reencuentro</i> (miniseries) 17. <i>La Cocinera de Castamar</i> (series) 18. <i>Los Hombres de Paco</i> (series) 19. <i>#Luimelia</i> (series) 20. <i>Toy Boy</i> (series) <p>FLOOXER – 1</p> <ol style="list-style-type: none"> 21. <i>La Reina del Pueblo</i> (series) <p>DISNEY+ – 1</p> <ol style="list-style-type: none"> 22. <i>Besos al Aire</i> (miniseries) <p>FILMIN – 1</p> <ol style="list-style-type: none"> 23. <i>Doctor Portuondo</i> (series) <p>MITELE PLUS – 1</p> <ol style="list-style-type: none"> 24. <i>Los Relojes del Diablo</i> (series) <p>TNT – 1</p> <ol style="list-style-type: none"> 25. <i>Maricón Perdido</i> (series) <p>HBO Max – 4</p> <ol style="list-style-type: none"> 26. <i>30 Monedas</i> (series) 27. <i>Sin Novedad</i> (series) 28. <i>Todo lo Otro</i> (series) 29. <i>Venga Juan</i> (series) <p>MOVISTAR+ – 9</p> <ol style="list-style-type: none"> 30. <i>Dime Quién Soy</i> 31. <i>Hierro</i> (series) 32. <i>La Fortuna</i> (series) 	<p>Amazon Prime Video – 1</p> <ol style="list-style-type: none"> 50. <i>3 Caminos</i> (series – Spain and Portugal) <p>HBO Max – 1</p> <ol style="list-style-type: none"> 51. <i>Auga Seca</i> (series – Spain and Portugal)

Source: Obitel Spain

Amazon Prime Video is the OTT with the most titles (11), including the return of the iconic series from Antena3 *El Internado*, despite the fact that this network has its own platform -Atresplayer Premium- which this year offers 10 premieres. Netflix has as many titles as Amazon Prime Video, Movistar+ has nine, and HBO Max five. The rest of the platforms (Disney+, Filmin, Flooxer, Mitele Plus and TNT) only offer one fiction each.

3.4. Narrative features of VoD in 2021

The prolific contribution of Spanish fiction to the VoD modality embraces a wide variety of genres and subgenres whose most outstanding characteristic is perhaps the construction of intrigue. To the point that most of the series that have contributed to Spain turning into one of the great generators of fiction content worldwide are thrillers (*Sky Rojo*, *El Inocente*, *La Casa de Papel*) or include some suspenseful continuity plot (*Élite*).¹⁸

Mysteries and murders play an important role in a good part of the 16 dramas included this year. In some cases, such as *El Internado*, *Las Cumbres*, *Los Relojes del Diablo* or even *Toy Boy*, the classification is complicated by the relevance that both genders acquire. This is an unsurprising feature considering the variety of subgenres that the Spanish thriller includes this year: horror (*Historias para No Dormir*), fantasy (*30 Monedas*), police (*Hierro*, *Los Hombres de Paco*) or road movie (*Sky Rojo*).

Having each season revolving around a main plot is already a generalized narrative characteristic, which has even been extended to comedy. This last genre, which is slowly but inexorably languishing in free-to-air fiction, is recovering positions among the niche streaming audience, hybridized with intrigue and drama (*Venga Juan*, *Maricón Perdido*), and even daring to mix humor and superheroes (*El Vecino*).

4. Interactivity and audience participation

Viewers have been able to enjoy Spanish fiction beyond broadcasts thanks to a multitude of transmedia strategies and exclusive content through different windows and formats. After its premiere, *30 Monedas* launched a board game that not only allows you to recreate but also expand events, characters and challenges from the universe created by Álex de la Iglesia. *Los Protegidos: El Regreso* also accompanied its premiere with the launch of a virtual escapism game, whose objective is to help Dora flee from her kidnappers with the help of clues found by viewers in installments of the series or the podcast hosted by Rosa Ruano's character, *La Hora del Búho*. *La Caza*. *Tramuntana* presented the first official audio game of a Spanish series, which allows the viewer to become a character and pair up with Corporal Víctor Gamero to solve a crime committed in Mallorca thanks to voice assistant technology.

¹⁸See <https://elpais.com/television/2022-04-06/nace-think-data-la-herramienta-que-busca-arrojar-luz-a-los-datos-de-audiencia-de-netflix-y-amazon.html>

The veteran *Cuéntame Como Pasó* continued to accompany its broadcasts with the special program *Novéntame Otra Vez*, while each installment of *HIT* was followed by *Generación HIT*, a late night show discussing some of the topics addressed in the teen fiction. The unstoppable success of *#Luimelia* continues its transmedia expansion with the novel *Luimelia en París*, written by Anna Marchessi and Pablo Murciano. In podcast we have two premieres, *La Hora del Búho*, already mentioned, and *La Fortuna. El Podcast*, a documentary series that includes a news investigation about the real pirates of the 21st century and those who fight art plundering.

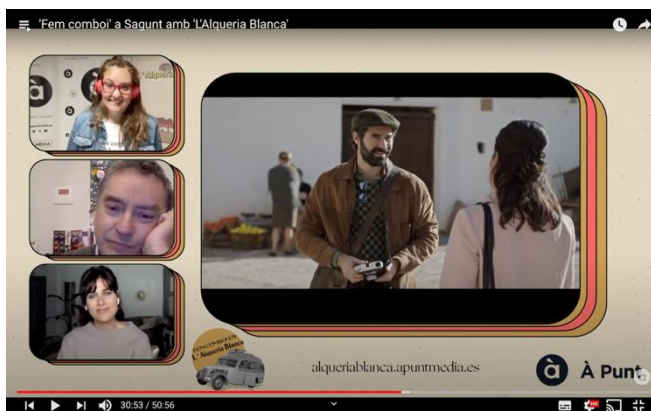
4.1. *L'Alqueria Blanca* and DIME

Aiming to improve the results obtained in 2019, the series *L'Alqueria Blanca* returned to À Punt in 2021, reformulated and preceded by the launch of a campaign by FLUOR Lifestyle. The creative agency designed a branded content strategy and transmedia narrative focused on emotions and the active participation of the old community of fans of the series to convert them in influencers of the new season. Hence the name of the campaign: “DIME” (“TELL ME”).

First, “super fans” were located and activated by being asked to put forward questions about future storylines. In this way, nine citizens became the protagonists during the launch of the campaign. Their faces and their questions flooded the streets of Valencia, as well as the press, television, radio, social networks, marquees and even buses. The date of the premiere was a topic of conversation in all the network’s programs and its narrative universe was expanded by eight online content pieces, amongst which stand out “Juego de tramas”, where fans imagine alternative futures for the characters; “L’Alqueria Dates”, a game of real and unlikely pairings between characters from the series; “L’Alqueria ilustrada”, the starting point of a drawing contest of the favorite characters or places of *L’Alqueria*, and “Dime por qué vuelves”, where the actors explain the reasons for their characters to live new adventures.



In addition, an audio fiction was created as a podcast, “El confesionario”, with the secret recordings that Tonet made of the residents of *L’Alqueria* while hiding a tape recorder in the church’s confessional. In addition “Fem comboi” took place, *coll-shows* (or collaborative shows) that were created due to the impossibility of holding face-to-face events. The “Fem comboi” are a meeting place between fans and main characters of *L’Alqueria Blanca*, with live guests, constant surprises and the active participation of the more than 50,000 followers of the series who joined these meetings.



All these proposals achieved their main objective: the first episode of *L’Alqueria Blanca* became the most watched premiere in the channel’s history, with a share that almost quadrupled the channel’s average audience: 12.5%. The show also managed to be trending topic with more than 4.5 million organic impressions, more than 50 comments on average per publication and 94% positive comments.¹⁹

5. The highlights of the year 2021

The increase in teen fiction, to which the success of *Élite* on Netflix since 2018 is no stranger, is one of the highlights of television fiction in 2021, both on free-to-air networks and in VoD. The second season of *HIT* (La1) plays with temporal alteration to descend into the hells of the peculiar educator who encapsulates the plots starring a group of troubled youngsters. On TV3, *Moebius*’ math teacher launches an investigation, at the school to investigate the circumstances surrounding the death of one of her students. Movistar+ contributes this year to teen fiction with *Los Espabilados* (Movistar+), an approach to mental illness by Albert Espinosa, the creator of *Polseres Vermelles* (TV3, 2011-2013). The second season of *Merlí Sapere Aude*, the *spin off* of another TV3 series (*Merlí*, 2015-2018), has migrated this year to Amazon Prime Video after a first season on Movistar+ in 2019. Finally, the return of *El Internado* (*El Internado. Las Cumbres*) and of *Física o Química* (*Física o Química. El Reencuentro*), and the fourth season of *Élite*, complete the prolific panorama of teen fiction, a subgenre of drama that has a long history in

¹⁹ <https://fluorlifestyle.com/tag/lalqueria-blanca/>

Spain (Lacalle, Gómez-Morales and Hidalgo-Mari, 2021). This last series has taken advantage of its popularity with the launch of *Élite*, *Historias Breves*, four stories of three parts each that explore different aspects of the first season of *Élite*.

Parrot's Analytics poll in the second half of 2021 regarding the demand of VoD fictions in Spain, gave comedy a share of 15.8%, a figure significantly higher than that of most of the countries included in the report²⁰. This interest in comedy explains the high number of VoD releases of a genre that, despite having seen better times, bets its survival on its remarkable capacity for mutation. Self-fiction (*By Ana Millán, Maricón Perdido, Doctor Portuondo*); humorous reflection on issues as relevant as organ trafficking (*Jodi2*) or political corruption (*Venga Juan*); and the reinvention of *costumbrismo* -customs and manners- (*El Pueblo, La Reina del Pueblo*) are some of the featured titles this year.

The thriller, the second most demanded streaming genre in fiction after drama (according to the aforementioned Parrot Analytics report), includes among its most requested fictions *La Casa de Papel*, which was in its third season. In 2021, *Jaguar*, a story about a Nazi hunt in Madrid in the sixties, joins the ranks of intrigues set in the past. *Hierro*, another of the most requested series by Spanish viewers, has also been one of the most praised by critics in a year highlighted by nostalgia (*El Internado. Las Cumbres, Los Hombres de Paco*) and female protagonism (*El Sabor de las Margaritas, Hache, Sky Rojo, Auga Seca* or the same *Hierro* and *Jaguar*). The free-to-air thriller also includes notable contributions, such as the aforementioned series *La Caza. Tramuntana* and *Ana Tramel. El Juego*, the miniseries *Fúria* and *Moebius* (TV3), all of them starring women; as well as two TVG productions set in the world of drug trafficking (*Método Criminal* and *A Lei de Santos*).

Co-productions continue to be a pending issue in domestic fiction, which this year has a *biopic* on Leonardo da Vinci (*Leonardo*), with the participation of different television groups and producers (Rai Fiction and Lux Vide, Sony Pictures Entertainment, Big Light Productions, Alfresco Pictures, France TV and RTVE). Spain has also co-produced the thriller *Ana Tramel. El juego* with Germany (RTVE, Tornasol Media, DeAPlaneta and ZDF Enterprises) and with Italy the action and intrigue series *Los Relojes del Diablo* (RAI, Mediaset Spain and Picomedia, TVE). In regional productions, TVG has explored with the Portuguese RTP *Auga Seca* (Portocabo, SPi Televisão, TVG), a promising route to the Spanish-Portuguese thriller inaugurated by *Vidago Palace* in 2017 (HOP!, Portocabo, TVG), which has already announced the premiere of *Sequia* (Atlantia Media, Coral Europa, RTVE, Rádio-televisão Portuguesa, TVG) for 2022.

The second season of *El Cid* and director Alejandro Amenábar's incursion into television fiction, with *La Fortuna* (Movistar+), mix historical drama with adventure

²⁰ See Spain streaming market share analysis Q2 2021: Netflix, Movistar+, Amazon Prime Video, Disney+, Hulu and more. Available at: <https://www.parrotanalytics.com/insights/streaming-wars-who-is-winning-spain-q2-2021/> 1

in two notable productions, the first of which is listed as the fifth most demanded Spanish fiction in the aforementioned Parrot report Analytics .

6. Theme of the year 2021. Transformations in television seriality and its impact on Ibero-American television fiction formats in streaming times

The takeoff of Spanish fiction in the 1990s introduced new guidelines in production and programming, which remain in general television despite the changes experienced since then. The consolidation of domestic fiction throughout the decade determined its expansion in prime time, with the consequent displacement of Latin American telenovelas and US series to the daytime and nighttime slots, respectively. The standard series, made up of 13 episodes lasting between 70 and 80 minutes, shared prime time with what were then called noble formats, the TV Movie and the miniseries of two or three chapters, while the serial colonized the slot in the afternoon on the grids of TVE and Antena3 at the expense of *telenovelas*.

The emergence of fiction in streaming has not introduced substantial changes in Spanish formats, although it has resulted in a real serial turn of the structural and narrative strategies of the stories, whose plots have turned intrigue into one of the main narrative engines of the different genres. The adoption of a standard around 60 minutes per installment and the drastic limitation of the number of seasons on the air are, along with the serialization of the narrative, the most notable changes in terms of formats.

In general terms, it can be said that the quality of Fast Moving Consumers Goods (FMCG) of television fiction, due to the overabundance of the offer in the VoD era, and binge watching taking hold, tend to blur the differences between the series and the miniseries, while the feature film displaces the TV Movie in the OTT catalogues. The free-to-air serial is, up to now, the only format that resists changes, supported by the afternoons of La1 and Antena3. It remains to be seen if it will have a generational renewal or if, on the contrary, it is destined to become a vestige of the history of television fiction.

6.1. Structure of stories and narrative strategies

Most of the national and regional fiction aired in 2021 has a serial structure, a dramatic effect and the *diegesis* in suspense at the end of each installment as the main strategy to arouse the curiosity of the audience and motivate viewing. This type of structure is particularly common in thrillers, intrigues and mysteries (*Élite*, *El Internado*, *Las Cumbres*, *Hierro*, *Paraíso*, *Toy Boy*), as well as in cop-shows (*El Sabor de las Margaritas*, *Parot*) and dramas (*Alba*, *Hache*, *Acacias 38*, *Amar Es Para Siempre*). The pre-eminence of open narratives with a structure by chapters and the recurrent use of the cliff-hanger make the final shots in *El Tiempo Que Te Doy*, an exception, as these “pillow shots” don’t have a desire for dramatic significance and offer instead a break from the protagonist’s emotions.

In Spain, for decades, even comedy has abandoned the self-conclusive formula of sitcoms. The most popular comedies, *Los Hombres de Paco*, *La Que Se Avecina* and *El Pueblo*, adopt an episodic structure; but they also include continuity plots with arcs spanning several episodes or even the entire season. *Servir y Proteger*, on the other hand, is based on a serial format and mixes the narrative arcs that extend throughout the entire season with the episodic subplots (police cases) that are resolved in a single installment. Among the most innovative proposals we should mention *30 Monedas*, whose first three episodes are presented almost independently, with a different supernatural event in each installment. But, starting with the fourth, Álex de la Iglesia's series of mystery and terror turns towards a greater development of the characters and correlates the previous events, apparently autonomous, in a background plot. This year, the recovery of the anthology format also stands out, with the revival of *Historias Para No Dormir*, and the fragmentary structure of *Besos Al Aire*, whose independent plot lines unfold without crossing each other.

In a television context marked by immediate consumption and the reduction of chapters/episodes per season, literary adaptations are trending. Eight were released in 2021, six of which were a single-season format (*Ana Tramel*, *El Juego*, *Dime Quien Soy*, *El Inocente*, *La Cocinera de Castamar*, *La Templanza* and *Los Espabilados*). On the contrary, the biopic diminishes its presence (*El Cid*, *Leonardo*, *Federica Montseny*, *la dona que parla*, and *Tocats pel foc*), but it diversifies thanks to comedy with autobiographical overtones, in which reality and fiction are difficult to distinguish (By *Ana Milan*, *Doctor Portuondo* or *Maricón Perdido*).

6.2. Complex narrative strategies

The growing importance of crime shows and the introduction of criminal plots in a good part of the fictions premiered, also justify the frequent use of flashbacks, a resource through which we learn about the past of the characters -which helps us to empathize with them- and we obtain clues that help to solve the proposed narrative puzzle. This is the case, for example, of *Moebius*, which begins each of its episodes with a flashback about Àlex's life before the accident in which he lost his life and revolves around a key object or location in the investigation. In *Jaguar*, flashbacks are distinguished from the rest of the story by the use of black and white animation (Image 1).



Image 1. Flashback of *Jaguar* (S1.E4).

The use of flashback is also decisive in fictions that move between two time lines, such as *El Inocente* and *El Tiempo Que Te Doy*. The first makes the audience travel back and forth in time to go through a period of twelve years, between the moment in which the protagonist (Mateo) kills a person and the beginning of the storyline. The second, in addition to being an exception due to the duration of its episodes (11 minutes), travels between the past and present of its protagonist, Lina, to rebuild her relationship and show its evolution after the breakup. As the plot progresses, the memories diminish, as if they were fading, and the present time increases: while the first chapter dedicates ten minutes to the past and only one to the present, in the tenth and last the proportion is reversed. Thus, the non-linear structure takes on a dramatic function: the story of Lina's process of disconnecting from the memory of her former partner.

Some fictions alter temporality through the parallel development of different stories. *Maricón Perdido* is an autobiographical dramatic comedy, whose author (Bob Pop) tells his story through different time jumps that alternate three periods of his life (80s, 90s and present). *Dos Vidas* simultaneously tells the story of a grandmother and a granddaughter, separated by more than half a century. *Dime Quién Soy* narrates the story of Amelia Garayoa, represented through a long flashback that lasts practically the entire fiction.

In addition to alterations in the temporality of the narration, Spanish audiovisual fiction explores the interiority of the characters through the introduction of fantastic elements. For example, *Maricón Perdido* includes dreamlike moments to portray Roberto's mother and resorts to the transformation of the protagonist into a star of video clips to, through music, reveal the feelings of the character. The scene

that closes the fiction also includes a *metalepsis* of the author: Bob Pop enters the narrated world to address his own character. In a comic key, Javier, the protagonist of *Pequeñas Coincidencias*, talks to a girl and a boy that only he sees and who represent the daughter or son he is expecting with Marta, from whom he has separated. Ana (*By Ana Milan*) has conversations with her deceased grandmother and with Lope de Vega. *Física o Química. El Reencuentro* recovers the character of Fer, who was killed in the last season, as a ghost that only Yoli, her best friend, and David, her ex-partner, can see.

Another strategy of television fiction to reveal the feelings and emotions of the characters, as well as offering information about the story itself, is the use of narrators, in this case protagonists. For example, *Doctor Portuondo* is subject to Carlo's monotone voice; while *Sky Rojo* uses the voice of its protagonist (Coral) both to describe the characters (including herself) and to tell what is happening; a strategy previously adopted in *La Casa de Papel* and other Vancouver Media productions. The narrator of *Los Espabilados*, Mickey L'Angelo, even goes so far as to break the fourth wall, speaking directly into the camera. This resource was also frequent in the first three seasons of *#Luimelia*, but it disappeared on the first chapter of the fourth season in which, paradoxically, the fourth wall is broken to announce that said resource will not be used again.

El Inocente also includes a leading narrator, although he opts for a multiperspective aimed at prolonging the suspense: Mateo is responsible for the narration of the first chapter, while in the following seven installments the narrator and the point of view change so that other characters tell us their own story. In *Libertad*, on the other hand, a witness narrator is identified. That is John (Jorge Suquet), an English chronicler who tells the story of the legendary bandit Lucia La Llanera, the protagonist of the fiction. Although this character shapes the story at various points, his role as narrator is introduced into the fiction precisely to question the validity of his story and raise a debate about the reliability of different points of view. Hence the distance placed by the story itself between the legend narrated by John and the events that forged that legend, events that the audience has also witnessed.

Finally, *Todo lo Otro* introduces the only narrator who is located outside the story (heterodiegetic and omniscient). It is the voice of Alberto Casado, who comments on everything that happens (being redundant on numerous occasions) and jokes at the expense of the characters.

Bibliography

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