

# SPAIN: BALANCE OF FORCES IN A SYSTEM THAT INCREASINGLY LEANS TOWARDS STREAMING

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## Introduction

Spanish television fiction maintains its high production and quality standards in 2022, as in previous years, although its most notable characteristics demonstrate a system in constant evolution. Thus, the decrease in premieres on generalist channels reflects, once again, the commitment of major private networks (Antena3 and Tele5) to streaming distribution. However, it also reflects the fluctuations in production on the state public television. On the other hand, regional channels reaffirm their stability with one more title than of last year and a similar genre distribution.

Netflix once again leads as the OTT platform with the highest number of premieres, compensating for the moderate decrease in Atresplayer and Amazon Prime Video. The increase in the number of fiction series launching their first season characterizes a programming lineup that, like in previous years, maintains a balance between drama and thriller, while comedy contracts and fantasy expands in stories aimed at the youth target audience. Short-duration series and miniseries further solidify their presence in the offerings of OTT platforms.

### 1. The audiovisual context of Spain in 2022

Traditional television consumption continues to decline, as does advertising investment. The annual weighted audience index of the three major generalist channels (35.3%, -2.2) also continues its negative trend and decreases to a new historical low. On the other hand, pay television reaches a new record (9.8%, +1.2), while regional channels present their best data since 2013 (8.4%). For the first time in its history, Antena3 is declared the audience leader in Spain.

### 1.1. Open television in Spain

Once again, traditional television consumption decreases and reaches its historical minimum: 190 minutes per person per day (176 minutes of linear consumption, 7 minutes of time-shifted consumption, and 7 minutes of guest consumption), which represents a reduction of 24 minutes compared to last year (-11%). On the other hand, hybrid TV consumption (internet, streaming, video games, and DTT radio) reaches its historical maximum, registering 36 minutes per viewer per day (+16.7%). This increase brings the total consumption (conventional, traditional pay-TV, and hybrid TV) per person per day to 226 minutes, 18 minutes less than in 2021 (-7.4%). This confirms, once again, that the decline in television consumption is not due to a disaffection towards the medium itself, but rather to a fragmentation of its consumption across multiple screens. In fact, one of the time slots where the decrease in traditional viewing is particularly noticeable is the prime time on weekdays, which coincides with the peak usage time of streaming platforms: 61.4% of users connect at 10:00 PM.<sup>1</sup>

**Table 1. National open television channels in Spain**

Ownership	Public Stations (14)		Private Stations (11)	
	First channel	Second channel	First channel	Second channel
<b>State (national coverage)<sup>2</sup></b>	La1	La2 24H Clan Teledeporte	Antena3, Cuatro, LaSexta, Tele5	Atreseries, BEMADtv, Boing, BOM Cine, Disney Channel, Divinity, DKISS, DMax, Energy, FDF, Gol Play, Mega, Neox, Nova, Paramount Network, Real Madrid HD, Ten, Trece, Verdi Classics
<b>Autonomic (regional coverage)</b>	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, SX3/33, Telemadrid Int, TPA2, TV3CAT, TVG2	8Madrid, 8TV, HitTV, La7, La8, TV Mediterráneo, Rac105	
TOTAL STATIONS = 25 TOTAL CHANNELS = 63				

Source: Obitel España

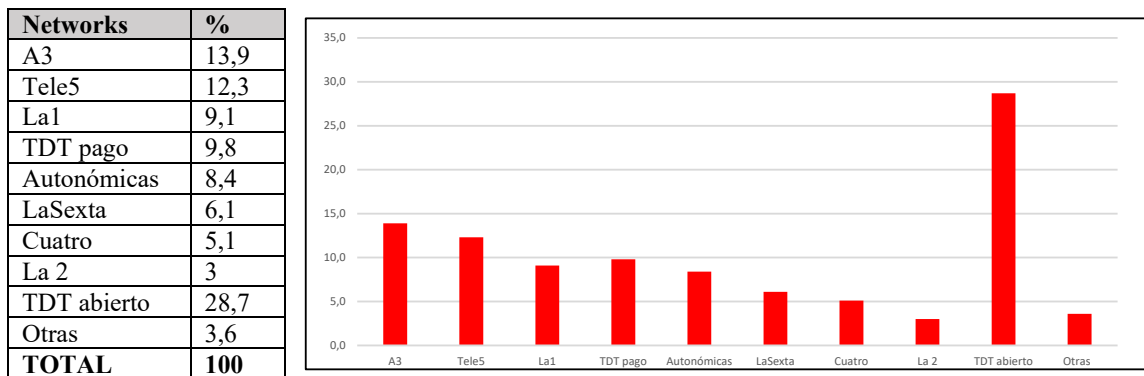
After a decade of Tele5's leadership, Antena3 is proclaimed as the most-watched network of the year (13.9%, +0.1). Antena3 achieves this historic victory with its highest rating since 2009, leading every day of the week except Sunday, as well as the afternoon (14:00-17:00), evening (17:00-20:30), and prime time (20:30-24:00) time

<sup>1</sup> <https://www.dos30.com/actualidad/category/audiencias-vod/>

<sup>2</sup>Translator 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.

slots. Tele5, on the other hand, records its lowest annual rating (12.3%, -2.6). The third position once again goes to La1 (9.1%), whose audience grows by 0.3% compared to the previous year thanks to the broadcast of the Qatar World Cup. LaSexta (6.1%, -0.3) surpasses Cuatro (5.1%, -0.2) one more time, with Cuatro reaching a new historical low. La2 continues its positive trend (3%, +0.1) and achieves its best result since 2010. The cumulative rating of the thematic channels (DTT) also reverses its negative trend (28.7%, +1.3) due to significant increases in audience for FDF (2.6%, +0.2), Energy (2.5%, +0.4), and Atreseries (1.7%, +0.3).

**Graph 1. Share by state channels**

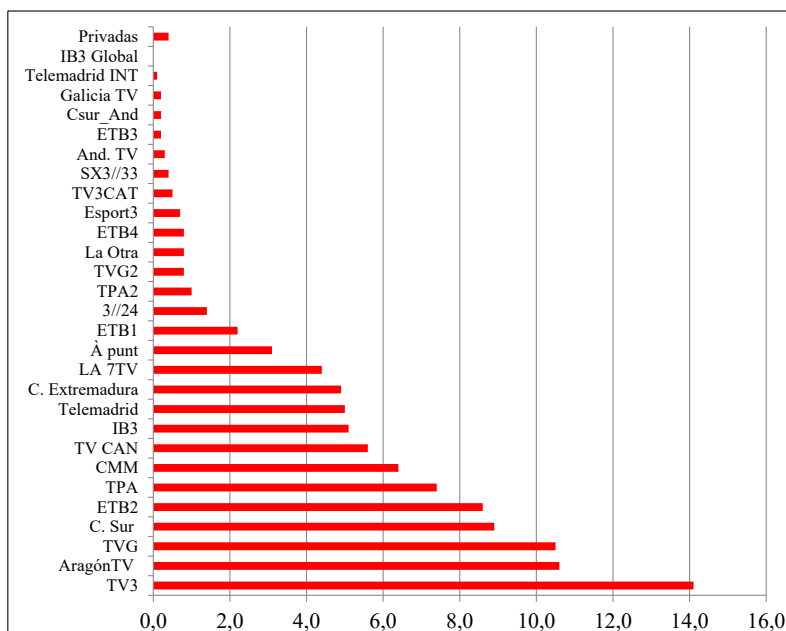


Source: Barlovento Comunicación/KantarMedia.

The public regional channels repeat the result of the previous year (8.4%), achieving their best rating since 2013. Once again, TV3 (14.1%, +0.1) is the channel with the highest audience share and confirms its leadership in Catalonia for the thirteenth consecutive year. It is followed by AragónTV (10.6%, +0.1) and TVG (10.5%, +0.4). The group of private regional channels grows by one-tenth (0.4%) in 2022.

**Graph 1a. Share by regional networks**

Channels	%
TV3	14,1
AragónTV	10,6
TVG	10,5
C. Sur	8,9
ETB2	8,6
TPA	7,4
CMM	6,4
TV CAN	5,6
IB3	5,1
Telemadrid	5
C. Extremadura	4,9
LA 7TV	4,4
À punt	3,1
ETB1	2,2
3//24	1,4
TPA2	1
TVG2	0,8
La Otra	0,8
ETB4	0,8
Esport3	0,7
TV3CAT	0,5
SX3//33	0,4
And. TV	0,3
ETB3	0,2
Csur_And	0,2
Galicia TV	0,2
Telemadrid INT	0,1
IB3 Global	0
Privadas	0,4
<b>TOTAL</b>	<b>100</b>

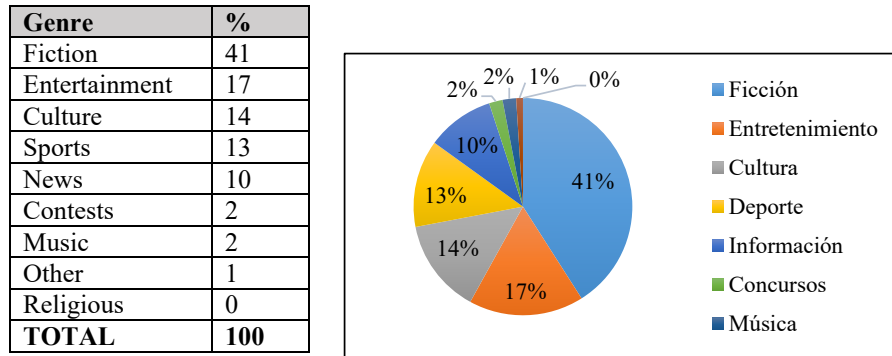


Source: Barlovento Comunicación/KantarMedia.

The leadership by business groups also changes, and this time it belongs to Atresmedia (27.2%, -0.1), followed by Mediaset (26.2%) which loses two points compared to 2021. The audience share of both groups continues to represent more than half of the total (53.4%), although it decreases by 2.2 points compared to last year. RTVE reverses its negative trend and increases by two-tenths (14.7%); while FORTA (Federation of Regional Radio and Television Organizations) gains one-tenth (8.3%). Unidad Editorial also grows (2.7%, +0.1), and Squirell Media maintains the same result (2.6%).

Fiction continues to be the genre with the highest presence across the channels (41%, -0.5), followed by entertainment (17%, -0.3), culture (14%, +0.1), sports (13%, +1.3), and news (10%, -0.4). Furthermore, it is worth noting that in 2022, fiction has gained relevance in the programming of thematic channels: Mega, Gol Play, and BeMad decided to restructure their content, which was previously focused on reality TV and/or sports, to make room for fiction with the aim of consolidating their position.

**Graph 2. Genres in TV programming**



Source: Barlovento Comunicación/KantarMedia.

Atresmedia, RTVE, and Mediaset restructured their executive leadership teams in 2022. Javier Bardají, who had been in charge of content at Atresmedia for the past 12 years, was appointed as the new CEO, replacing Silvio González, who became the Executive Vice President of the company. Eighteen months after his appointment as president of RTVE, José Manuel Pérez Tornero resigned from his position, and Elena Sánchez became the new interim president. Lastly, Paolo Vasile stepped down as CEO of Mediaset after over two decades, and Alessandro Salem was appointed as his successor.

### 1.2. Pay TV and VoD platforms in Spain

DTT (Digital Terrestrial Television) continues to be the main system for distributing television content in Spain, but it has decreased by one percentage point compared to the previous year (72%) and sets a new historical low due to the increase in viewing through pay TV (IPTV, cable, or satellite), a system that also achieves a new record (27.7%, +0.7) thanks to the growth of IPTV (18%, +1).

Traditional pay TV channels maintain their positive trend and achieve a new record: 9.8% (+1.2), which is 14% higher than the previous year. This is a television modality that has been continuously gaining viewers since 2013. Among the top ten most-watched pay channels is TNT, which premiered *No Me Gusta Conducir* in 2022, and Comedy Central, which, although it doesn't have its own fiction, airs national productions such as *Camera Café*, *Aída*, or *La que Se Avecina*.

**Table 2. Pay television channels in Spain**

10 most watched pay TV channels in Spain			
Channel	Genre	Source	% Pay <sup>3</sup>
LALIGATV por M+	Soccer	Spain	4.0
Fox	Fiction	USA	3.0
AXN	Fiction	USA	3.0
#VAMOS por M+	Sports	Spain	1.9
TNT	Fiction	USA	2.5
Eurosport	Sports	France	1.9
Calle 13	Fiction	USA	2.1
Canal Hollywood	Film	USA	2.0
Comedy Central	Comedy	USA	1.8
Canal Historia	Documentary	USA	1.3

Source: Barlovento Comunicación/KantarMedia

The most important international VoD platforms in Spain are Netflix, Amazon Prime Video, HBO Max (Warner Bros. Discovery), Disney+, Apple TV, RakutenTV, DAZN, Lionsgate+ (Starz) y Pluto TV (Paramount). SkyShowtime (Comcast and Paramount Global) joined the group in 2002, announcing several national fiction releases for 2023. On the Spanish side, the most relevant platforms are Movistar+ and Movistar+ Lite (Telefónica), Filmin, FlixOlé, RTVE Play, Atresplayer Premium, Mitele Plus and LOVEStv.

### 1.3. Sources of financing for the audiovisual sector

Advertising investment grew by 4.7% in 2022. However, investment in television, the second area with the highest investment after “Digital”, decreased to 1,731.8 million euros, 3.3% less than the previous year. The advertising investment of the group of national open broadcast televisions decreased by 4.2% (1,519.5 million), which, in turn, decreased its market share by 0.8 points (87.7%). The fall in advertising investment in free-to-air television is mainly due to the fact that the two main media groups, Mediaset and Atresmedia, lost advertising strength: the first reached 710.5 million euros, which translates into a decrease of 7.4% compared to the previous year; while the second placed its advertising billing at 699.1 million, which represents a reduction of 2.6% compared to 2021. Both reached a market share of more than 40% (41% and 40.4% respectively). On the contrary, the investment of the regional television group increased by 4.9% (92.5 million), obtaining a market share

<sup>3</sup> Percentage of the channel's screen share in relation to pay television as a whole.

of 5.3% (+0.4). Pay channels, on the other hand, sharpened their negative trend and decreased by 19.4% (80.3 million), placing their share at 4.6% (-1.0)<sup>4</sup>.

#### **1.4. Communication Policies**

The new General Law on Audiovisual Communication (LGCA), finally approved on June 22, maintains the obligation for television stations to contribute to the production and visibility of European content, now also including the large streaming platforms. Thus, companies such as Netflix, Amazon Prime Video or Disney+ will have to dedicate part of the income generated in Spain to financing European audiovisual works (with a quota reserved for films and series in Spanish and another for co-official languages of the State), either producing it, distributing it or contributing money to the Fund for the Protection of Cinematography or the Fund for the promotion of cinematography and audiovisuals in co-official languages other than Spanish.

The new law also affects many other relevant issues such as the protection of minors, with schedules for certain programs, parental controls or the prohibition of using their data for commercial purposes. The financing of RTVE –to which the platforms will now also have to contribute–, the first controls on top YouTubers and parity in the industry –the platforms will have to finance production created or directed exclusively by women– are also relevant developments. Other changes in the new law affect the advertising field since they facilitate saturation -the limit of minutes of advertisements per hour is extended- and allow the channels to modify their programming whenever they wish, giving free rein to counter-programming that was previously prohibited.

#### **1.5. Digital and mobile connectivity infrastructure**

In March, the government awarded a subsidy of 76.9 million euros to the RTVE Institute, the corporation's specialized training center in the audiovisual area, to launch a new project: "Proyecto Haz". This project consists of creating a hybrid learning platform, which will combine audiovisual content on the Internet with accompanied, tutored and face-to-face learning, with the aim of providing digital skills training to 40,800 people throughout Spain. The program will also be open to collaboration with other agents in the audiovisual sector, such as regional and local television stations and associations, and even some Spanish and Latin American universities with specialized master's degrees. In addition, it will have the collaboration of institutions from the world of cinema, animation and videogames from all over Spain.

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<sup>4</sup> <https://www.infoadex.es/home/wp-content/uploads/2023/02/Resumen-Estudio-InfoAdex-2023.pdf>

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

Spanish television production shows few changes in a year characterized by continuity, reaffirming, once again, the average quality of its 78 premieres (81 in 2021), 28 of which have been offered on open broadcast channels (10 national and 18 regional) and 50 in the different pay platforms. The free-to-air premieres of Latin American fiction continue to compete with telenovelas of Turkish origin, two of which have already been adapted by Antena3: *Alba* (Fatmangul) and *Madre*.

National private channels continue to prioritize the distributions of their premieres through their respective platforms (Atresplayer Premium, RTVE Play) or their alliances with OTTs (in the case of Tele5 and La1 with Amazon Prime Video). Hence, La1 is, once again, the channel with the greatest number of titles broadcast on free-to-air TV (seven), followed by Antena3 (two) and Tele5 (one).

**TABLE 1. Premiere fictions shown in 2022 on state channels (national, foreign in the Obitel scope, and co-productions)**

PREMIERE NATIONAL TITLES	PREMIERE FOREIGN TITLES
<b>La 1 – 7</b> 1. <i>Cuéntame Cómo Pasó</i> (series) 2. <i>Los Misterios de Laura</i> (TVmovie) 3. <i>Dos Vidas</i> (serial) 4. <i>Fuerza de Paz</i> (series) 5. <i>Sequía</i> (series) 6. <i>Fuego Cruzado</i> (miniseries) 7. <i>Servir y Proteger</i> (serial)	<b>Divinity – 1</b> 1. <i>La Suerte de Loli</i> (telenovela)
<b>Antena3 – 2</b> 8. <i>Amar Es para Siempre</i> (serial) 9. <i>Alba</i> (series)	<b>La 1 – 1</b> 2. <i>Diseñando tu amor</i> (telenovela)
<b>Tele5 – 1</b> 10. <i>Entrevías</i> (series)	<b>Nova – 4</b> 3. <i>La Desalmada</i> (telenovela) 4. <i>Quererlo Todo</i> (telenovela) 5. <i>Rubí</i> (telenovela) 6. <i>Vencer el Desamor</i> (telenovela)
<b>CO-PRODUCTIONS</b> <b>2</b>	<b>CO-PRODUCTIONS</b> <b>0</b>
	<b>Total premiere titles OBITEL</b> <b>16</b>

Source: Obitel España

Regional fiction offers the same number of productions as last year (18), with the Catalan TV3 in the lead for yet another year (six titles) and some novelties, such as the return of Canal Sur to its own fiction production with *Desconocidas*, about a group of women whose lives intertwine in an Andalusian town. Also noteworthy is the increase in Valencian national production at À Punt, with three premieres, and its participation in the TVC production *Després de Tu*, and in the two IB3 productions, *Sicília sense Tu* and *Mòpies* - the latter also co-produced by TVC. TVG and IB3 have three premieres respectively, and ETB1 has two.

**TABLE 1a. Premiere fictions exhibited in 2022 on regional channels (national, foreign in the Obitel scope, and co-productions)**

<b>PREMIERE REGIONAL TITLES</b>	<b>PREMIERE FOREIGN TITLES</b>
<p><b>TV3 – 6</b></p> <ol style="list-style-type: none"> <li>1. <i>El Metralla</i> (TVmovie)</li> <li>2. <i>Sis Nits d'Agost</i> (TVmovie)</li> <li>3. <i>Alguns Dies d'Ahir</i> (TVmovie)</li> <li>4. <i>Cucut</i> (serie)</li> <li>5. <i>Com si Fos Ahir</i> (serial)</li> <li>6. <i>Incidents</i> (serie)</li> </ol> <p><b>TVG – 3</b></p> <ol style="list-style-type: none"> <li>7. <i>Saudade de Ti</i> (serie)</li> <li>8. <i>A Lei de Santos</i> (serie)</li> <li>9. <i>Chegar a Casa</i> (serie)</li> </ol> <p><b>À PUNT – 3</b></p> <ol style="list-style-type: none"> <li>10. <i>L'Alqueria Blanca</i> (serial)</li> <li>11. <i>Desenterrats</i> (serie)</li> <li>12. <i>Després de Tu</i> (serie)</li> </ol> <p><b>ETB1 – 2</b></p> <ol style="list-style-type: none"> <li>13. <i>Irabazi Artei</i> (serie)</li> <li>14. <i>Go!azen</i> (serie)</li> </ol> <p><b>IB3 – 3</b></p> <ol style="list-style-type: none"> <li>15. <i>Sicília sense Tu</i> (serie)</li> <li>16. <i>Pep</i> (serie)</li> <li>17. <i>Mòpies</i> (serie)</li> </ol> <p><b>Canal Sur – 1</b></p> <ol style="list-style-type: none"> <li>18. <i>Desconocidas</i> (serie)</li> </ol>	
<b>CO-PRODUCTIONS<sup>5</sup></b>	<b>0</b>
<b>CO-PRODUCTIONS</b>	<b>0</b>
	<b>Total premiere titles OBITEL 18</b>

Source: Obitel España

As usual, reruns do not follow any type of specific pattern, apart from the reprogramming on open broadcast TV of some premieres from their paid offer; for example, *La Novia Gitana*, *Alba* and *Mentiras* on Antena 3 and *Sin Límites* on La1. Disney+ added to its catalog various series that were originally aired on national generalist channels in recent years, such as *Néboa*, *La Otra Mirada*, *Promesas de Arena*, *Parot* or *Hit* (from La1); *No Identity* or *Suspicion* (Antena3). Netflix has added *Merlí Sapere Aude*, from Movistar+.

The regional channel À Punt continues to repeat its long-running production *L'Alqueria Blanca* (premiered on the defunct Canal9 in 2007), and some hits from

<sup>5</sup> This group of channels have offered two regional co-productions this year: *Després de Tu* (À punt and TV3) and *Sicília sense Tu* (IB3 and À Punt).

TV3 (*Benvinguts a la Família, Vida Privada*) or the comedy *Check in Hotel*, also from Canal9 (2009). TV3 and TVG, the regional channels with the largest domestic fiction, offer their premieres from previous years on their respective “On-Demand” services, as do ETB, Canal Sur or IB3.

**Table 2. Formats of new national fiction in 2022 and their evolution over a five-year period**

Format	Titles						Hours					
	2018	2019	2020	2021	2022	Total	2018	2019	2020	2021	2022	Total
Serial	4	6	5	5	3	23	942:20	997:15	969:00	754:55	480:00	4.143:30
Series	20	16	8	8	5	57	259:45	179:30	61:10	70:35	73:30	644:30
Miniseries	0	1	0	0	1	2	0	3:30	0	0	3:00	6:30
Sitcom	0	0	0	0	0	0	0	0	0	0	0:00	0:00
Tv movie	0	0	0	0	1	1	0	0	0	0	1:30	1:30
Docudrama	1	1	0	0	0	2	252:00:00	14:00	0	0	0:00	266:00
Others	1	0	0	0	0	1	1:10	0	0	0	0:00	1:10
<b>Total</b>	<b>26</b>	<b>24</b>	<b>13</b>	<b>13</b>	<b>10</b>	<b>86</b>	<b>1.455:15</b>	<b>1.194:15</b>	<b>1030:10</b>	<b>825:30</b>	<b>558:00</b>	<b>5.063:10</b>

Total: Obitel España

As can be seen in table 5a, the stability of the regional channels, which continue to offer all their premieres in open broadcast, mitigates the decrease in the number of series in the overall Spanish context, national and regional, (from 35 titles in 2018 to 14 in 2022). The reduction in the number of series is also reflected in the decrease in exhibition hours (409 hours and 15 minutes in 2018 compared to 150 hours and 30 minutes in 2022).

The total offer of serialized programs shows no fluctuations (five titles in 2018 and six in 2022). However, the decrease in the number of hours in the last five years (1,051 hours and 50 minutes in 2018 -the first year of the five-year period- compared to 742 hours and 40 minutes in 2022), reflects the tendency to limit the duration of the programs. TV3 confirms its commitment to *TV movies*, with three premieres dedicated to the remembrance of some historical events of the past: the Civil War (*El Metralla*), the Democratic Transition (*Sis Nits d'Agost*) and the turbulent period that followed October 1, 2017 pretended refered, examined from different points of view (*Alguns Dies d'Ahir*). The three miniseries represent a significant increase in this format compared to the only premiere of this format in 2021.

**Table 2a. Formats of new national and regional fiction in 2022 and their evolution over a five-year period**

Format	Titles						Hours					
	2018	2019	2020	2021	2022	Total	2018	2019	2020	2021	2022	Total
Serial	5	7	7	6	6	31	1,051:50	1,102:15	1,035:50	860:55	742:40	4,793:30
Series	35	29	20	20	14	118	409:15	314:50	169:00	168:35	150:30	1,212:10
Miniseries	4	2	4	1	2	13	10:00	6:30	12:20	1:40	5:30	36:00
Sitcom	0	0	0	0	0	0	0	0	0	0	0:00	0:00
Tv movie	4	3	0	3	4	14	5:50	4:40	0	4:25	6:30	21:25
Docudrama	1	1	0	0	0	2	252:00	14:00	0	0	0:00	266:00
Others	3	1	0	0	1	5	12:45	9:10	0	0	2:40	24:35
<b>Total</b>	<b>52</b>	<b>43</b>	<b>31</b>	<b>30</b>	<b>27</b>	<b>183</b>	<b>1,741:40</b>	<b>1,451:25</b>	<b>1,217:10</b>	<b>1,035:35</b>	<b>907:50</b>	<b>6,353:40</b>

Source: Obitel España

The number of hours for the 10 titles of national fiction released in 2022 (13 in 2021) amounts to 558 (compared to 825 hours and 30 minutes in 2021), one of which was co-produced with Portugal: the thriller *Sequía*, set on the border and titled *Crimes Submersos* in Portuguese. La1 thus joins the co-productions between the Galician TVG and the Portuguese RTP (such as *Auga Seca*, *Portocabo*, and *Vidago Palace*), in which Amazon Prime Video has also participated with the thriller *Marea Negra*.

The six Latin American telenovelas premiered on the national channels in open broadcast (the same number as in 2021) represent 30% of the time devoted to fiction shown in Iberian-American countries in 2022, equivalent to 239 hours and 10 minutes. As on other occasions, Mexico is the country that contributes the greatest number of titles (five).

**Table 3. State fiction premieres in 2022: countries of origin**

Country	Titles	%	Hours	%
<b>NATIONAL (overall)</b>	<b>10</b>	<b>63</b>	<b>558:00</b>	<b>70</b>
<b>OBITEL COUNTRIES (total)</b>	<b>6</b>	<b>37</b>	<b>239:10</b>	<b>30</b>
Argentina	0	0	0	0
Brazil	0	0	0	0
Chili	0	0	0	0
Colombia	0	0	0	0
Ecuador	0	0	0	0
Spain	9	56	548:00	70
US Hispanic	1	6	47:15	6
Mexico	5	31	191:10	23
Peru	0	0	0	0
Portugal	0	0	0	0
Uruguay	0	0	0	0
Venezuela	0	0	0	0
<b>CO-PRODUCTIONS (total)</b>	<b>1</b>	<b>6</b>	<b>10:00</b>	<b>1</b>
National Co-productions	1	6	10:00	1
Co-productions Countries Obitel	0	0	0	0
<b>TOTAL</b>	<b>16</b>	<b>100</b>	<b>797:10</b>	<b>100</b>

Source: Obitel España

The 28 premieres that make up national and regional television fiction broadcast in Spain this year (30 in 2021) represent 82% of the Ibero-American total, with a volume of 911 hours and 50 minutes (1,035 hours and 35 minutes in 2021). Fiction from the rest of the Ibero-American countries, broadcast entirely on state channels, represents the remaining 18% in terms of the number of titles and 21% in terms of hours.

**Tabla 3a. State and regional premiere  
fiction exhibited in 2022: countries of origin**

Country	Titles	%	Hours	%
<b>NATIONAL (overall)</b>	<b>28</b>	<b>82</b>	<b>911:30</b>	<b>79</b>
<b>OBITEL COUNTRIES (total)</b>	<b>6</b>	<b>18</b>	<b>239:10</b>	<b>twenty-one</b>
Argentina	0	0	0	0
Brazil	0	0	0	0
Chili	0	0	0	0
Colombia	0	0	0	0
Ecuador	0	0	0	0
Spain	27	79	901:30	78
US Hispanic	1	3	47:15	4
Mexico	5	15	191:55	16
Peru	0	0	0	0
Portugal	0	0	0	0
Uruguay	0	0	0	0
Venezuela	0	0	0	0
<b>CO-PRODUCTIONS (total)</b>	<b>1</b>	<b>3</b>	<b>10:00</b>	<b>1</b>
National Co-productions	1	3	10:00	1
Co-productions Countries Obitel	0	0	0	0
<b>TOTAL</b>	<b>34</b>	<b>100</b>	<b>1.150:40</b>	<b>100</b>

Source: Obitel España

As already indicated in relation to table 5, the widespread adoption of the series format by OTTs has led to a drastic reduction this year both in the number of premieres on national channels (five) and in the number of hours (73 hours and 30 minutes). Consequently, the weight of serialized content stands out, accounting for 480 hours equivalent to 83.3% of the Spanish total. The six Latin American telenovelas have aired a total of 239 hours and 10 minutes.

**TABLE 4. Formats of national fiction and Obitel exhibited in 2022**

Format	Títulos				Horas			
	National	%	Other Obitel	%	National	%	Other Obitel	%
Serial	3	30.0	6	83.3	480:00	86.0	239:10	97.00
Series	5	50.0	0	16.7	73:30	13.2	7:30	3.00
Miniseries	1	10.0	0	0.0	3:00	0.5	0	0.0
TV movie	1	10.0	0	0.0	1:30	0.3	0	0.0
Unitary	0	0.0	0	0.0	0	0.0	0	0.0
Docudrama	0	0.0	0	0.0	0	0.0	0	0.0
Others	0	0.0	0	0.0	0	0.0	0	0.0
<b>Total</b>	<b>10</b>	<b>100.0</b>	<b>6</b>	<b>100.0</b>	<b>558:00</b>	<b>100.0</b>	<b>246:40</b>	<b>100.0</b>

Source: Obitel España

The 14 series aired this year on Spanish channels (national and regional) account for 51.9% of the total, with a runtime of 150 hours and 30 minutes. As for serials, the three titles from the regional channels add to the other three from the state channels and increase the airtime of this format to 742 hours and 40 minutes (81.8% of the total).

**TABLE 4a. National and regional fiction formats Obitel exhibited in 2022**

Format	Titles				Hours			
	National	%	Other Obitel	%	National	%	Other Obitel	%
Serial	6	21.4	6	83.3	742:40:00	81.8	239:10	97
Series	14	50.0	0	16.7	150:30	16.6	7:30	3
Miniseries	3	10.7	0	0.0	9:10	1.0	0	0.0
TV movie	4	14.3	0	0.0	6:30	0.7	0	0.0
Unitary	0	0.0	0	0.0	0	0.0	0	0.0
Docudrama	0	0.0	0	0.0	0	0.0	0	0.0
Others	1	3.6	0	0.0	2:40	0.3	0	0.0
<b>Total</b>	<b>28</b>	<b>100.0</b>	<b>6</b>	<b>100.0</b>	<b>911:30</b>	<b>100.0</b>	<b>246:40</b>	<b>100.0</b>

Source: Obitel España

The only open-air series in Tele5, the drama *Entrevías*, tops the national ranking with 1,707,000 viewers (15.9%), securing its renewal for 2023. *Alba*, the aforementioned adaptation of the Turkish soap opera *Fatmangul* on Antena3, takes the second position (1,638,000 viewers and 13.6% share). *Los Misterios de Laura*, a special installment of the homonymous police series on La1 in TVmovie format<sup>6</sup>, ranks third. The more than five points that distance it from *Entrevías* have not prevented the network from announcing a two-episode miniseries scheduled for 2023. The long-lived *Cuéntame Cómo Pasó* (airing uninterruptedly since 2001) shows its wear and tear in fourth place in the ranking (1,208,000 and 9.3%).

<sup>6</sup> *Los Misterios de Laura* has three seasons aired in 2009, 2011 and 2014.

The second open-air premiere on Antena3, the serial *Amar Es para Siempre* (81,168,000 viewers and 12% share), precedes, in fifth position, the new TVE productions, the series *Fuerza de Paz* and *Sequía*, the serials *Dos Vidas* and *Servir y Proteger*, and the miniseries *Fuego Cruzado*, which completes the national top 10 ranking.

**TABLA 5: 10 National most viewed titles in 2022**

Title	Channel	Producer (Country)	Format/Genre	Chap./ep. 2022	Time slot	Thousands	Rating	Share	
1	<i>Entrevías</i>	Tele5	Alea Media/Mediaset España	Series/Drama	16	Prime time	1,707,000	3.7	15.9
2	<i>Alba</i>	A3	Atresmedia and Boomerang TV	Series/Drama	13	Prime time	1,638,000	3.6	13.6
3	<i>Los Misterios de Laura</i>	La1	RTVE and Veranda TV	TV movie/Cop show	1	Prime time	1,329,000	2.9	10.4
4	<i>Cuéntam e Cómo Pasó</i>	La1	Grupo Ganga Producc., RTVE	Series/Dramedy	20	Prime time	1,208,000	2.6	9.3
5	<i>Amar Es para Siempre</i>	A3	Diagonal TV	Serial/Drama	253	Afternoon	1,168,000	2.6	12.0
6	<i>Fuerza de Paz</i>	La1	RTVE and Alea Media	Series/Thriller	8	PT & NT	839,000	1.8	8.6
7	<i>Sequía</i>	La1	Atlantia Media, Coral Europa, para TVE and RTP	Serie/Police	8	Prime time	769,000	1.7	6.4
8	<i>Dos Vidas</i>	La1	RTVE and Bambú Producciones	Serial/Drama	26	Afternoon	653,000	1.4	6.6
9	<i>Servir y Proteger</i>	La1	Plano a Plano	Serial/Police	247	Afternoon	602,000	1.3	6.8
10	<i>Fuego Cruzado</i>	La1	BBC, RTVE, Dancing Ledge, Buddand Club, Sur Film	Miniserie/Police	3	PT & NT	593,000	1.3	5.8
Total national productions: 10			Foreign original scripts:0						
100%			0%						

Source: Obitel España

The first place in the regional ranking belongs to a TV Movie from TV3, *El Metralla*, an unusual achievement for this format, attributable to the popularity of its author, Joan Pera, and the interest in the topic addressed: the story of a POUM militiaman (Partit Obrer d'Unificació Marxista), who spends much of the Spanish Civil War hiding in an attic along with a priest. The rest of the Catalan television productions occupy positions two (the series *Cucut*), three (the serial *Com si Fos Ahir*), four (the TV movie *sis Nights d'Agost*) and five (the TV movie *Alguns Dies d'Ahir*), while the sixth contribution from TV3 closes the annual ranking (the sketch *Incidents*). *Desconocidas*, the series that marks Canal Sur's return to original fiction, ranks sixth (112,000 viewers and 2.4% share), following the aforementioned five Catalan productions, followed by *L'Alqueria Blanca* in its first season as a serial (67,000 viewers and 8.1% share). Finally, it should be noted that although the 2022 ranking exceptionally only includes one TVG series (in ninth position), the share obtained (9.2% and 66,000 viewers) constitutes the sixth highest figure in the overall ranking.

**TABLA 5a: 10 Regional most viewed titles in 2022**

Title	Channel	Producer (Country)	Format/Genre	Chap./ep. 2022	Time slot	Thousands	Rating	Share	
1	<i>El Metralla</i>	TV3	La Drecera Produccions	TV movie/Drama	1	Night time	352,000	4.7	18.3
2	<i>Cucut</i>	TV3	Massa d'Or Produccions, Ja Som Dos Producc., AIE, TVC, Xarxa TV Locals	Miniseries/Drama	5	Afternoon	314,000	4.2	13.6
3	<i>Com si Fos Ahir</i>	TV3	TVC	Serial/Drama	212	Prime time	246,000	3.3	18.3
4	<i>Sis Nits d'Agost</i>	TV3	Institut Català Empreses Culturals, Mallerich Films, Nanouk Films, Paco Poch Cinema, TV3	TV movie/Drama	1	Prime time	192,000	2.6	12.9
5	<i>Alguns Dies d'Ahir</i>	TV3	Grup Focus and TV3	TV movie/Drama	1	Prime time	163,000	2.2	10.0
6	<i>Després de Tu</i>	À Punt, TV3, IB3	Albena Produccions, Minoria Absoluta	Series/Comedy	20	Prime time	126,000	2.7	6.8
7	<i>Desconocidas</i>	Canal Sur	Galdo Media, Lola Cinema, Canal Sur Radio and TV, À Punt	Series/Dramedy	13	Afternoon	112,000	1.4	4.4
8	<i>L'Alqueria Blanca</i>	À Punt	Trivisión, S.L., Zenit TV	Serial/Drama	130	Prime time	67,000	1.5	8.1
9	<i>Saudade de Ti</i>	TVG	Voz Audiovisual	Serial/Drama	60	Night Time	66,000	2.5	9.2
10	<i>Incidents</i>	TV3	TVC, El Terrat (Mediapro Studio)	Sketch/Comedy	4	Night Time	4,4000	0.6	5.6
Total national productions: 10			Foreign original scripts: 0						
100%			0%						

Source: Obitel España

### 3. VoD monitoring 2022

The number of digital platforms continues to increase, although subscriptions are decreasing. Thrillers and dramas maintain their hegemony, while comedies continue their downward trend. This year, there has been a notable increase in fantasy content aimed at attracting a younger target audience.

#### 3.1. VoD Platform Market in 2022

Competition intensifies this year with the arrival of new players: AMC+, AMC Network's premium on-demand subscription service, and Enfamilia, a new general linear channel that seeks to bring all members of the household together in front of the television. Established OTTs took advantage of 2022 to attract new consumers. Starzplay, the premium streaming service from Starz, rebranded and became Lionsgate+ to strengthen its identity in the international market. Netflix closed the year by introducing its ad-supported version priced at 5.49 euros, aiming to get ahead

of Disney+ in offering an ad-supported option, which will not be available in Spain until 2023. Free ad-supported platforms have also made their way into Spain and now offer a wide range of content (Plex, Pluto TV, Tivify, Samsung TV Plus, Rlaxx TV, Runtime). On the other hand and going with a different strategy, Apple TV+ increased its monthly rate by 40%, from 4.99 euros, which had been maintained since the service was launched, to 6.99 euros.

According to the results of the 3rd wave of 2022 of the OTT and pay TV market barometer carried out by Barlovento Comunicación, Netflix leads the ranking (56.9%), followed by Amazon Prime Video (50.9%), HBO (26.8%), Disney+ (25.5%) and Movistar+ (18.3%)<sup>7</sup>. The third wave of the General Media Study (EGM) confirms the first two positions (Netflix with 9.6 million homes and Amazon Prime Video with 6.6 million homes), but the third position is shared by Movistar+ and HBO (3.6 million homes respectively), while Disney+ is in fourth place (3.2 million homes)<sup>8</sup>. The fifteenth wave of the OTT Barometer of the Cabinet for Audiovisual Communication Studies (GECA) also confirms Netflix (72.1%) and Amazon Prime Video (68.2%) as leaders. Disney+ appears as the third option (33.5%), relegating HBO (31.4%) and Movistar+ (22.7%) to fourth and fifth position respectively<sup>9</sup>. Finally, the 4th wave of VOD Analytics (SigmaDos30') ratifies the top four positions of the previous study (Netflix, 78.8%; Amazon Prime Video, 76.3%; Disney+, 37.5%, and HBO Max, 37.4%), but closes with RTVE Play (18.1%).<sup>10</sup>

### 3.2. Offer of local VoD platforms in 2022 (national, regional within the country)

Movistar+ appears in the *Top 5* of the Barlovento Comunicación, GECA and EGM reports mentioned above. The OTTs of the rest of the Spanish telecommunication companies have a much more limited market penetration: Euskaltel, Telecable and R have 400,000 subscribed households, according to the EGM.

Atresplayer Premium (6.4), Movistar+ Lite (5.4%), Filmin (4.5%) and Mitele Plus (3.5) respectively occupy the seventh, eighth, tenth and eleventh positions in the GECA OTT Barometer. This same study indicates that *La que Se Avecina* (28.3%) not only maintains first place as the most viewed series of the quarter on platforms, but also achieves its best result in the last four waves.

<sup>7</sup> <https://barloventocomunicacion.es/barometrotv-ott/barometro-tv-ott-television-de-pago-y-otts-3a-ola-2022/>

<sup>8</sup> <https://barloventocomunicacion.es/wp-content/uploads/2023/01/Informe-anual-2022-Barlovento-Comunicacion.pdf>

<sup>9</sup> <https://www.geca.es/geca/informes/20230123--Barómetro%20OTT%20-%20Nuevo%20Informe%20Exclusivo%20Geca.pdf>

<sup>10</sup> <https://www.dos30.com/actualidad/category/audiencias-vod/>

### 3.3. VoD analysis in 2022: national premiere fiction and co-productions

Spanish fiction on VOD has released 50 titles in 2022, one less than last year, 41 of which debuted their first season (32 in 2021). In this context, the longevity of *La que Se Avecina* stands out, as it aired its 13th season, as well as *Élite*, which achieved a double release with the launch of the fifth and sixth seasons. The remaining productions offered their second and/or third seasons (*Historias para no Dormir*, *El Internado: Las Cumbres*, *Nasdrovia*, *Paraíso*, *La Unidad*, *Desaparecidos*) or their fourth (*Madres*, *Amor y Vida*).

Series continue to be the flagship format, although the trend to reduce the number of episodes is evident in the increase in miniseries (13 in 2022 and four in 2021). The anthology *Historias para no Dormir* returns with four horror films directed by different filmmakers, and this year it is joined by *Historias de Protegidos* (Amazon Prime Video) with five episodes derived from *Los Protegidos: El Regreso*, a sequel to the fantasy drama *Los Protegidos* (Antena3, 2010-2012).

**TABLA 9. National fictions and co-productions  
exhibited in 2022 on VoD systems.**

NATIONAL PREMIERES	CO-PRODUCTIONS
<p><b>AMAZON PRIME VIDEO – 6</b></p> <ol style="list-style-type: none"> <li>1. <i>Desaparecidos</i> (series)</li> <li>2. <i>Días Mejores</i> (series)</li> <li>3. <i>El Internado. Las Cumbres</i> (series)</li> <li>4. <i>Historias para No Dormir</i> (anthology)</li> <li>5. <i>La que Se Avecina</i> (series)</li> <li>6. <i>Un Asunto Privado</i> (series)</li> </ol> <p><b>ATRESPLAYER – 7</b></p> <ol style="list-style-type: none"> <li>7. <i>Heridas</i> (series)</li> <li>8. <i>Historias de Protegidos</i> (miniseries)</li> <li>9. <i>La Edad de La Ira</i> (miniseries)</li> <li>10. <i>La Ruta</i> (series)</li> <li>11. <i>Señor Dame Paciencia</i> (series)</li> <li>12. <i>Dos Años and Un Día</i> (series)</li> <li>13. <i>La Novia Gitana</i> (series)</li> </ol> <p><b>DISENY+ – 1</b></p> <ol style="list-style-type: none"> <li>14. <i>La Última</i> (series)</li> </ol> <p><b>HBO Max – 2</b></p> <ol style="list-style-type: none"> <li>15. <i>¡García!</i> (series)</li> <li>16. <i>Cómo Mandarlo Todo a La Mierda</i> (miniseries)</li> </ol> <p><b>MOVISTAR+ – 9</b></p> <ol style="list-style-type: none"> <li>17. <i>Apagón</i> (miniseries)</li> <li>18. <i>El Inmortal</i></li> <li>19. <i>Fácil</i> (miniseries)</li> <li>20. <i>La Unidad</i></li> <li>21. <i>Nasdrovia</i></li> <li>22. <i>Paráiso</i></li> <li>23. <i>Rapa</i></li> <li>24. <i>Sentimos Las Molestias</i></li> <li>25. <i>Todos Mienten</i> (miniseries)</li> </ol> <p><b>NETFLIX – 16</b></p> <ol style="list-style-type: none"> <li>26. <i>Alma</i> (series)</li> <li>27. <i>Bienvenidos al Edén</i> (series)</li> <li>28. <i>Élite</i> (series)</li> <li>29. <i>Érase Una Vez... Pero Ya No</i> (series)</li> <li>30. <i>Fanático</i> (miniseries)</li> <li>31. <i>Feria. La Luz Más Oscura</i> (series)</li> <li>32. <i>Intimidación</i> (series)</li> <li>33. <i>La Noche Más Larga</i> (miniseries)</li> <li>34. <i>Las de La Última Fila</i> (series)</li> <li>35. <i>Los Herederos de La Tierra</i> (miniseries)</li> <li>36. <i>Machos Alfa</i> (series)</li> <li>37. <i>Madres, Amor and Vida</i> (series)</li> <li>38. <i>Sagrada Familia</i> (miniseries)</li> <li>39. <i>Si lo Hubiera Sabido</i> (series)</li> <li>40. <i>Smile</i> (series)</li> <li>41. <i>Tu No Eres Especial</i> (series)</li> </ol> <p><b>LIONSGATE+ – 1</b></p> <ol style="list-style-type: none"> <li>42. <i>Express</i> (series)</li> </ol> <p><b>PLAYZ – 1</b></p> <ol style="list-style-type: none"> <li>43. <i>Ser o No Ser</i> (series)</li> </ol> <p><b>TNT – 2</b></p> <ol style="list-style-type: none"> <li>44. <i>No Me Gusta Conducir</i> (series)</li> <li>45. <i>El Gran Sarao</i> (miniseries)</li> </ol> <p><b>APPLE TV</b></p> <ol style="list-style-type: none"> <li>46. <i>Now &amp; Then</i> (miniseries)</li> </ol>	<p><b>AMAZON PRIME VIDEO – 2</b></p> <ol style="list-style-type: none"> <li>47. <i>Sin Límites</i> (miniseries – Spain and USA)</li> <li>48. <i>Operación Marea Negra</i> (series – Spain and Portugal)</li> </ol> <p><b>NETFLIX – 1</b></p> <ol style="list-style-type: none"> <li>49. <i>Santo</i> (series – Spain and Brasil)</li> </ol> <p><b>LIONSGATE+ – 1</b></p> <ol style="list-style-type: none"> <li>50. <i>El Refugio</i> (miniseries – Spain , Mexico, Chile)</li> </ol>
<b>Total: 46</b>	<b>Total: 50</b>

Source: Obitel España

In 2022, notable highlights include the significant increase in titles from Netflix, with 16 releases compared to 11 in 2021. Movistar+ maintains its stability with the same number of premieres as last year, totaling nine. On the other hand, Amazon Prime Video and Atresmedia experienced a decline, presenting six and seven titles respectively, in contrast to the 11 titles they released in 2021. TNT has two titles, one more than the previous year. A noteworthy addition is Lionsgate+, making its debut with the release of *Express* and the co-production *Refugio*.

As for co-productions, the collaboration between Spain and Portugal on Amazon Prime Video brought us a thrilling series inspired by real events called *Operación Marea Negra* (Amazon Prime Video). In the other three co-productions of 2022, along with Spain, participate the United States (*Sin Límites*), Brazil (*Santo*) and Mexico and Chile (the aforementioned *El Refugio*).

### **3.4. Narrative features of VoD in 2022**

The genre of premieres in 2022 has undergone some significant variations, confirming the changes identified in recent years, while also pointing to new trends. First and foremost, the stability of the thriller genre stands out, with 16 titles in 2022 compared to 15 in 2021. Similarly, the drama genre maintains its consistency with 16 titles in 2022, matching the number from the previous year. However, the comedy genre, which is more reliant on the fluctuations of global television, experiences a decline this year with three fewer titles (10 in 2022). On the other hand, there is an increase in the fantasy genre, with five titles in contrast to just one in 2021. This can be attributed to the growing focus on the youthful target audience, which has been identified in previous seasons as a socially unpredictable group with rapidly evolving interests.

The narrative articulation of each season revolving around the main plot has become a characteristic of Spanish streaming, in line with the international trend of reducing both the number of seasons and the number of chapters/episodes per season and their duration (43 minutes on average in 2022). These strategies reflect an industry on alert, which has already shown clear signs of saturation and is fearful of the loss of Netflix subscribers in 2022, marking the first time in its history.

## **4. Interactivity and audience participation**

The advent of the Internet made possible the interaction and active participation of the audience, while providing multiple spaces to increase the universe of television fiction. Just over a decade ago, social networks became the epicenter of transmedia strategies that continued to enhance classic formats (interactive maps, video games, comics, etc.). However, in recent years, television fictions that seek to extend their narratives beyond the small screen have become increasingly scarce, indicating the end of a trend.

If we look back, the most interesting transmedia proposals in Spain generally came from RTVE, Atresmedia and Movistar. RTVE's Laboratory, for instance, dedicated significant efforts to these types of strategies, including the creation of the video game *Águila Roja*, special episodes of *El Ministerio del Tiempo* with virtual reality elements, and the interactive short film *El Caso. Crónica de Sucesos*. In the case of Atresmedia, social networks served as the foundation for expanding the transmedia universe of its series (*El Barco*, *Paquita Salas* or *Luimelia*). Additionally, the development of microsites dedicated to each fiction has been another successful approach. Examples include "lacripta.com" and "lavalla2045.com", the web spaces of *La Catedral del Mar* and *La Valla*. Movistar, however, was the one who took Spanish transmedia to the next level with the premiere of *La Zona*. Through a gamified experience, the audience could access additional content from the series, as well as a second website ("La otra zona") with curated content that revealed hidden truths related to the plot. After the success of this first premiere, Movistar continued to bet on innovative experiences, such as the 3D recreation of Ava Gardner's house for the *Arde Madrid* microsite; the immersive police intranet of *Gigantes* or the multi-format strategy of *La Peste*.

However, as we have been pointing out for some years now, transmedia content accompanying new television fiction is becoming increasingly limited, nearly reaching insignificance in 2022. This indicates that the fast-moving nature of consumer goods of television fiction (due to the overabundance of the offer in the VoD era) and the prevalence of binge watching have pushed audiences towards a less committed consumption. In response, channels have reduced their investment in transmedia expansion. Among the fictions aired in 2022, only two noteworthy cases are identified, both from Atresmedia: *Historias de Protegidos*, spin-off of *Los Protegidos: El Regreso*, and *La Edad de la Ira*, the series' eponymous podcast.

Under the title *Historias de Protegidos* there are five short stories that bridge the gap between the first and second seasons of *Los Protegidos: El Regreso*, a revival of *Los Protegidos*. *Historias de Protegidos* focuses each of its installments on two main characters from the original series and adopts the narrative strategy of *Elite: Historias Breves*, which expands its narrative universe through short stories released between seasons. In 2021, this series already accompanied its premiere with the launch of a virtual escapism game and a podcast.

On the other hand, *La Edad de la Ira* has amplified its media presence by accompanying its television installments with a weekly podcast of the same name. This format is targeted towards adolescents and features the participation of 12 girls and boys between the ages of 14 and 17 who share their experiences and reflections on essential issues for their generation. The podcast is moderated by Nando López, author of the novel *La Edad de la Ira* from which the television fiction derives, and also has the participation of the protagonists of the series. This television production also

expanded its universe with other resources: an interactive map (El Madrid from ‘La edad de la ira’) with the most notable filming locations and a “false” documentary entitled “Who is Marcos? The documentary”, in which the same characters from the series talk about their relationship with Marcos.

## 5. Highlights of the year

The 11 state fiction productions released in 2022 reported an average audience of 1,050,600 viewers (9.5% share), approximately 50,000 viewers less than the 13 fictions released the previous year (1,151,752 viewers and 8.9% share). The contraction, which affects both production and consumption, responds to the downward trend experienced in recent years due to the oversaturation of OTT offerings, Tele5 previews on Amazon Prime Video and the launch of almost all Antena3 series on its own payment platform, Atresplayer Premium. Nothing new so far if it were not for TVE’s lack of interest in its own fiction shown throughout 2021 and 2022. Screenwriter Javier Olivares –the creator of successful shows like *El Ministerio del Tiempo*– expresses his dissatisfaction in the following terms: “Pérez Tornero has not made a single effort to promote Spanish fiction. The last thing he has probably watched is *I, Claudius*. There has not been no sensitivity to fiction under his leadership at TVE. This is unprecedented, regardless of who is in charge of the Government<sup>11</sup>. The article published in *Fotogramas* magazine in December summarizes the year 2022 as an “Annus Horribilis for TVE’s fiction,” criticizing the network’s programming policy.<sup>12</sup>

Nevertheless, the lineup of state television premieres on free-to-air channels presents a diverse range of offerings. Among them, the Spanish-Portuguese co-production *Sequía* stands out, a thriller that begins in a dry swamp bordering both countries and combines the allure of border territories with a nostalgic reflection of the past (the 1990s). The long-standing series *Cuéntame Como Pasó* (La1) aired its penultimate season (number 22) in 2022, relinquishing its position as the most-watched family fiction to the series *Entrevías* (Tele5). This drama about the relationship between a grandfather and his granddaughter mixes some of the clichés of *El Gran Torino* (Eastwood, 2009) –the grumpy old man adapting to a multicultural society– with the sweetening of *Médico de Familia* (Tele5, 1995-1999), paradigm of 1990s comedy in Spain.

The premieres of the regional channels, on the other hand, remain stable (17 titles in 2022 and 18 in 2021) and show a consistency lacking in the offering of the national channels. Valencian television has turned the series *L’Alqueria Blanca* into

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<sup>11</sup> See [https://www.abc.es/play/series/noticias/abci-busca-series-espanolas-prime-time-1-202211062331\\_noticia.html](https://www.abc.es/play/series/noticias/abci-busca-series-espanolas-prime-time-1-202211062331_noticia.html). As already mentioned in the first section of this chapter, José Manuel Pérez Tornero directed RTVE between April 2021 and September 2022, amid various controversies that ultimately pushed him to resign.

<sup>12</sup> See <https://www.fotogramas.es/series-tv-noticias/a42316596/television-espanola-series-2022/>

a daily serial, set in a rural environment during the late Franco era. It was initially broadcast weekly on the extinct Canal9 (2007-1013) and, later on, on À Punt (2019 and 2021), the network that replaced the latter after it closed in 2013. À Punt has also opted for the rural *thriller* (*Desenterrats*), as has TV3 (*Cucut*, adaptation of the 2019 film *La Vida sense la Sara Amat*), TVG (*A Lei de Santos*) and IB3 (*Sicília sense Morts*). The success of the long-running serial *Com si Fos Ahir* (TV3, 2017-) and the premiere of *Saudade de Ti* on TVG confirm the persistence of this format on FORTA channels, in what is presented as a vindication of the local in the face of the global nature of the big platforms.

In line with the dynamism of international fiction, the quantity and quality of the domestic offerings has led television analysts to question the sustainability of a system threatened by the continuous risk of collapse. Viewing modalities driven by streaming (speed watching, binge watching, etc.), combined with the high number of premieres, point to the mid-term unsustainability of a system that relies on the success of a modest number of fictions compared to the total number of new proposals. For instance, the latest report from Barlovento Comunicación on OTT platform content, released in December 2022, revealed that six out of the 12 most-watched Spanish series during the study period were fictions released as far back as 2003, such as *Aquí No Hay Quien Viva* (Antena3), the second most-viewed series on Amazon Prime Video, or 2005's *Cámara Café* (Tele5), ranking first on Movistar+<sup>13</sup>. The classification is completed by the youth drama *Élite* (Netflix), the comedy *La que Se Avecina* (Amazon Prime Video), released respectively in 2018 and 2007, and the four Movistar+ thrillers *El Apagón*, *La Unidad*, *El Inmortal* and *Todos Mienten*.

Among the critically acclaimed releases in 2022, three adaptations of bestsellers stand out: the thriller *La Novia Gitana*, based on the novel by Carmen Mola; *Los Herederos de la Tierra*, inspired by the sequel to *La Catedral del Mar*, by Idelfonso Falcones<sup>14</sup>; and *Fácil*, a comedy about four women with different degrees of disability who live together in an apartment in Barcelona, adapted from the novel by Cristina Morales and directed by the screenwriter for *Arde Madrid* (Movistar+, 2018), Anna R. Costa. The regional TV3 has surprised us this time with four sketches in which as many theater companies perform a comedy recorded with a single 35-minute sequence shot, which turns the scene into television fiction.

## **6. Theme of the year 2022. Independent production companies and the internationalization of TV fiction production in Iberoamerica**

In the 1990s, Spain witnessed the emergence and establishment of a robust television fiction production industry, following TVE's foray into series production in the

<sup>13</sup> The research was carried out between December 5 and 20, 2022. See <https://barloventocomunicacion.es/barometrotv-ott/contenidos-mas-vistos-en-otts/>

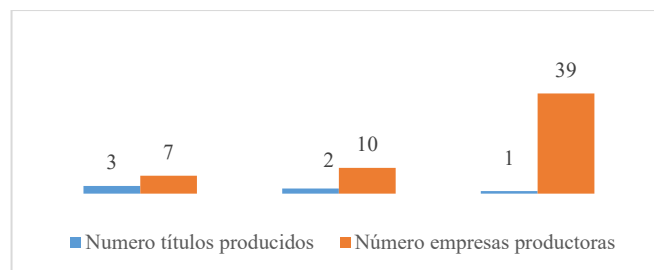
<sup>14</sup> The television adaptation of *La Catedral del Mar* premiered on Netflix in 2018.

1960s and 1970s, as well as the involvement of film production companies in miniseries during the 1980s (Lacalle, 2018). However, despite early successes, the highly competitive nature of the system and the reliance of small companies on different programs aimed at promoting the sector, led to a somewhat oligopoly dotted with numerous short-lived small producers (Álvarez-Monzoncillo; Baraybar -Fernández; López-Villanueva, 2015).

A study by Lacalle and Sánchez revealed in 2019 that more than 60% of independent Spanish production companies had only participated in a single fiction out of the 490 released between 1990 and 2017. In contrast, 10 companies (RTVE, Atresmedia group, Mediaset group, and seven independent production companies) accounted for more than half of these releases. The authors highlighted the contradiction between growing specialization and vertical concentration on the one hand, and atomization on the other, and attributed the excessive fragmentation to the progressive shift from internal and associated external production modalities to external production.<sup>15</sup>

Thus, the consolidation of OTTs in the last five years has further reinforced the trends identified in the aforementioned research, with some nuances that give a new character to Spanish production in the global era. On the one hand, the fragmentation characteristic of the sector has increased with 77 premieres in 2022 coming from 56 different companies (graph 3), resulting in an average of 1.4 productions per company. It is also observed that the number of production companies responsible for a single fiction title has increased (69.6% compared to 60% of the research carried out between 1990 and 2017) and that none of the most active companies has participated in more than three productions. Among them, Filmax, a film company, stands out this year for its involvement in the mystery miniseries *Todos Mienten* (Movistar+) and the intrigue and fantasy series *Feria. The Darkest Light* (Netflix).

**Graph 3. Number of titles produced by each company in 2022**



Source: Obitel Spain

<sup>15</sup> Enrique Bustamante distinguished in 1999 between internal production, associated external production, financed external production, and coproduction with other networks.

Another relevant consequence induced by the expansion of OTTs has been the drastic decrease in internal production, which this year has a single title: The Catalan public television serial *Com Si Fos Ahir* (on air since 2017); an ensemble drama that, in November 2022, celebrated its uninterrupted leadership in TV3's afternoon slot with the airing of its 1,000th episode. The television groups RTVE, Atresmedia and, to a lesser extent, Mediaset España sometimes participate in the production through the associated external modality; but the degree of implication is so variable (even symbolic at times) that the elaboration of *ad hoc* typologies lacks interest precisely because of its futility. So much so, that the latest report from the GECA consulting firm on *Television production in the 2021/22 season* differentiates only between in-house production, delegated production (acquired from Spanish companies) and foreign production (acquired from foreign companies)<sup>16</sup>. This simplification is in line with the instability of current business configurations, so for the purposes of this study we consider independent production both delegated production and external production. Therefore, external or independent production includes production associated with or financed by television companies and OTTs and co-productions (Lacalle and Sánchez, 2019).

However, it is also necessary to mention a modality introduced in Spain by the Catalan Mediapro, a production company founded in 1994 and responsible for some of the great successes of Spanish fiction (both television and film). Mediapro launched in March 2019 The Mediapro Studio, a new business structure with the aim of positioning itself as a key player in the global market generating “unique content”. At the time of its launch The Mediapro Studio already had 10 creative offices around the world, 34 ongoing television fictions and a global investment of 200 million euros for fiction, entertainment and documentaries in Spain, Italy, Portugal, Great Britain, Finland, Colombia and Mexico. The uniqueness of The Mediapro Studio lies in its ability to cover “the entire value chain, from development, creation, production, provision of audiovisual services, artistic direction and distribution”, as stated by managing partner Jaume Roures on the occasion of its launch<sup>17</sup>. The Studio shares productions with major OTTs, the Spanish state networks and the Brazilian Globo Internacional, while Mediapro appears as the Spanish production company with the most activity in the 2021/22 season. The fictions promoted from The Mediapro Studios in 2022 have been *Incidents* (El Terrat), *Dos Años y Un Día* (Estela Films, Globomedia, Lacoproductora, Pólvora Films), *El Internado. Las Cumbres* (Globomedia) and *Express* (The Mediapro Studio).

<sup>16</sup> See <https://www.geca.es/geca/informes/20220807--Informe%20Producci%C3%B3n%20Temporada%20202122.pdf>

<sup>17</sup> See <https://www.elmundo.es/television/2019/03/19/5c91413b21efa08b168b45e4.html>

### 6.1. Business movements among production companies in 2022

In recent years, profound changes in the Spanish audiovisual landscape have turned competitors into business partners. This trend continues in 2022, the year in which fiction producers have continued to join forces to boost the industry. For example, Buendía Estudios, created by Atresmedia and Telefónica in 2020, has signed an agreement with Universal International Studios, a division of Universal Studio Group, to co-develop and produce original fiction, as well as to adapt NBCUniversal formats for the entire Spanish-language market. The Spanish adaptation of the Australian fiction *Safe Harbour*, winner of the international Emmy, will be the first project to be launched as a result of this agreement.

Secuoya Studios and Caracol TV have also signed an agreement in the international arena to jointly develop, produce and finance premium fiction projects in Spanish. Secuoya Studios and Caracol TV will be joint owners, with a 50% stake each, of the intellectual property of all the audiovisual works made within the framework of this agreement, they will retain the distribution rights in their own territories and will negotiate the possible international windows.

In parallel, PRISA Media has reinforced its video area with the incorporation of Lacoproductora (known for *Por H or B* and *Riders*), with whom they had been collaborating externally, as a unit for format creation, marketing and production of audiovisual projects. Banijay Iberia, formed in 2020 after the merger of Banijay and Endemol Shine, and encompassing eight of the most successful production companies operating in Spain and Portugal (Cuarzo Producciones, Diagonal TV, Endemol Portugal, Gestmusic, Magnolia, Shine Iberia, Tuiwok Estudios and Zeppelin), incorporated a new member: Pokepsie Films, the independent production company by Álex de la Iglesia and Carolina Bang, responsible for *30 Monedas*.

Finally, the Squirrel Media group closed 2022 with the acquisition of the Grupo Ganga production conglomerate, responsible for *Cuéntame Cómo Pasó* or *HIT*. It is worth noting that Squirrel Media had previously strengthened its position by acquiring Veralia Distribución de Cine and 75% of the shares of NET TV in January of the same year, thus becoming the third national private free-to-air television operator in Spain, behind only Mediaset and AtresMedia.

All these alliances and mergers between independent production companies strengthen the sector and consolidate the privileged position of the Spanish audiovisual industry. For example, after the merger of Warner and Discovery, budget cuts and strict cost-cutting measures continued to affect HBO Max, which has dismantled the production of originals in Nordic countries, Central Europe, the Netherlands and Turkey. Spanish production, however, has been maintained due to its good performance in Latin American markets and in the United States of America.

## 6.2. Internationalization of fiction production

Spanish fiction production has also been characterized by the interest it generates outside its borders. The Series Atresmedia label continues to captivate audiences worldwide and solidified its position as the group with the highest investment in Spanish fiction. In 2022, for example, it reached an agreement with the distributor Jung Consulting for the broadcast, in South Korea, of *El Tiempo Entre Costuras*, a critically acclaimed and popular series produced in collaboration with Boomerang TV. Additionally, *UPA Next*, the sequel to *Un Paso Adelante* also produced by Globomedia, can be seen in France thanks to the agreement reached with Groupe M6, one of the main French TV operators. In 2004, Groupe M6 already aired *Un Paso Adelante*, one of the pioneering Spanish series in internationalization that achieved a great success, reaching over 60 countries. Among the public television titles, the case of *La Otra Mirada* stands out, a fiction produced by Boomerang TV for RTVE, which has been aired since 2022 in the United States of America and Canada through Public Broadcasting Service (PBS).

Regarding the acquisition of formats for adaptation in 2022, *Il Patriarca*, the Italian version of *Vivir Sin Permiso*, a Mediaset España production in collaboration with Alea Media, has had its rights sold to Camfilm production company, for broadcast on Canale 5. Another notable adaptation from 2022 is *La Casa de Papel: Corea* (Netflix), an adaptation of the successful fiction created by Álex Pina.

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