

SPAIN: THE MOST PROLIFIC YEAR FOR TV FICTION

Authors:

Charo Lacalle (<https://orcid.org/0000-0002-0024-6591>)

Beatriz Gómez (<http://orcid.org/0000-0002-0557-528X>)

Mariluz Sánchez (<https://orcid.org/0000-0002-0076-7522>)

Sara Narvaiza (<https://orcid.org/0000-0002-5092-2690>)

Javier Mateos Pérez (<https://orcid.org/0000-0003-2056-8704>)¹

Team: Rosa Ferrer, Berta Trullàs, Raquel Crisóstomo, Tatiana Hidalgo-Marí, Jesús Segarra-Saavedra, María Porta, Suzamara Bastos, Irene Sorrentino, Tomás Cajueiro

Introduction

Original scripted fiction has reached its historical peak in 2023 with 98 productions; a remarkable increase both in streaming platforms and linear television, despite the lower number of viewers in the free-to-air reception mode compared to recent years. The activity of the Spanish television system, characterized by the rapid succession of premieres, is reflected in the variety of formats and in the alliances between channels and platforms, which seek to monetize new investments profitable and giving free-to-air fiction a second chance. Particularly noteworthy is the significant contribution of Atresplayer and the persistence of thrillers in VoD mode despite their decline in traditional broadcasting.

1. Spain's audiovisual context in 2023

Traditional television consumption continues to decline, as does advertising investment, contrasting with the increase in the number of viewers of hybrid TV (internet, video games and DTT radio). The annual weighted audience index of the three major generalist channels (33.4%, -1.9) reaches a new historical low; while traditional pay-TV channels register a high (10.4%, +0.6) and the regional public channels obtain their best figure since 2013 (8.5%, +0.1).

¹ Javier Mateos Pérez is the author of section 6 (Theme of the year: What is happening with the narratives in Ibero-American television fiction?)

Table 1. National open television channels in Spain

Ownership	Public Stations (14)		Private Stations (10)	
	First channel (14)	Second channel (16)	First channel (10)	Second channel (19)
State (national coverage) ²	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
Autonomic (regional coverage)	Ápunt, Aragón TV, CanalSur, CMM, C. Extremadura, IB3, ETB1, La 7TV, Telemadrid, TPA, TV3, TVCAN, TVG	3/24, And-TV, Esport3, ETB2, ETB3, ETB4, Galicia TV, LaOtra, SX3/33, TPA2, TV3CAT, TVG2	8Madrid, 8TV, HitTV, La7, La8, TV Mediterráneo	
TOTAL STATIONS = 24 TOTAL CHANNELS = 59				

Source: Obitel España

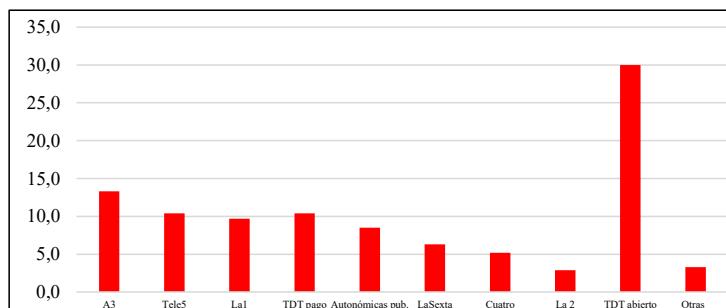
For the second consecutive year, Antena3 is the most-watched channel (13.3%, -0.6) thanks to its leadership for 298 days of the year, every day of the week and in the afternoons (14:00-17:00), evenings (17:00-20:30) and prime time (20:30-00:00). Tele5, on the other hand, records a new annual low (10.4%, -1.9), losing almost two points in audience share. Third position once again goes to La1 (9.7%), which grows by six tenths compared to the previous year, even reaching the second position in the annual ranking between July and November. LaSexta improves its results (6.3%, +0.2) and surpasses Cuatro once again (5.2%, +0.1). La2, however, deviates from its positive trend and loses one tenth (2.9%).

The cumulative index of the thematic channels (DTT) maintains its positive trend (30%, +1.3) due to the significant audience increases of BEMADtv (1.4%, +0.7) and Energy (3.0%, +0.5), both reaching their annual peak. Neox (2%) also grows by two tenths, while Atreseries (1.8%), Disney Channel (0.7%), Divinity (2.2%), Mega (1.5%), Real Madrid TV (0.6%), Teledeportes (0.7%) and TEN (0.9%) increase by one.

²Translator 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.

Graph 1. Share by state channels

Networks	%
A3	13,3
Tele5	10,4
La1	9,7
TDT pago	10,4
Autonómicas pub.	8,5
LaSexta	6,3
Cuatro	5,2
La 2	2,9
TDT abierto	30
Otras	3,3
TOTAL	100

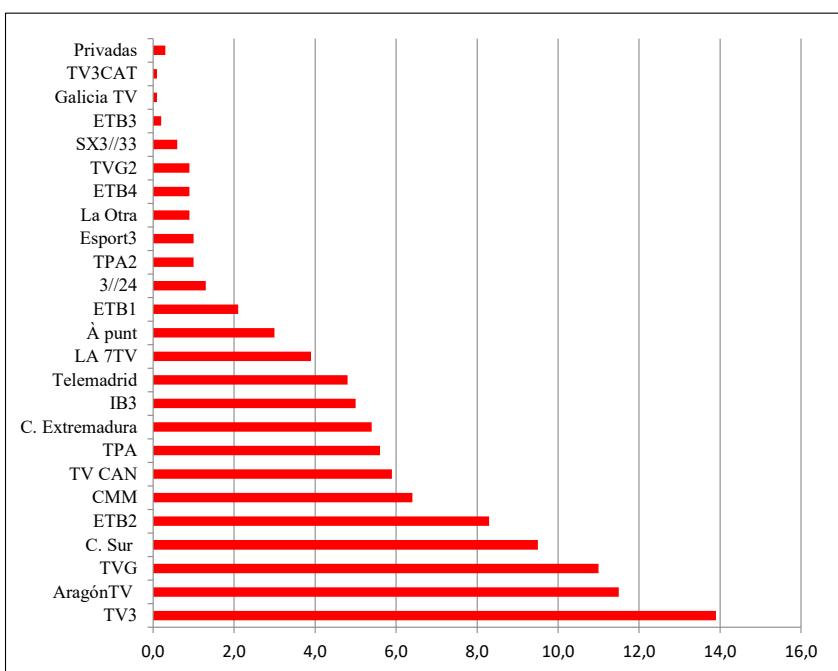


Source: Barlovento Comunicación/KantarMedia.

Public regional channels improve their results from the previous year (8.5%, +0.1), which already constituted their best record since 2013. TV3 (13.9%, -0.2) is the channel with the highest audience share, ratifying its leadership in Catalonia for the fourteenth consecutive year. It is followed by AragónTV (11.5%, +1), which repeats its historical peak of 2013, and TVG (11%, +0.5), which achieves its best figure since 2012. Conversely, the group of private regional channels loses one tenth (0.3%), to which should be added the disappearance of two channels due to the end of broadcasts of 8TV and Verdi Classics in October.

Graph 1a. Share by regional networks

Channels	%
TV3	13,9
AragónTV	11,5
TVG	11
C. Sur	9,5
ETB2	8,3
CMM	6,4
TV CAN	5,9
TPA	5,6
C. Extremadura	5,4
IB3	5
Telemadrid	4,8
LA 7TV	3,9
À punt	3
ETB1	2,1
3/24	1,3
TPA2	1
Esport3	1
La Otra	0,9
ETB4	0,9
TVG2	0,9
SX3/33	0,6
ETB3	0,2
Galicia TV	0,1
TV3CAT	0,1
Privadas	0,3
TOTAL	100

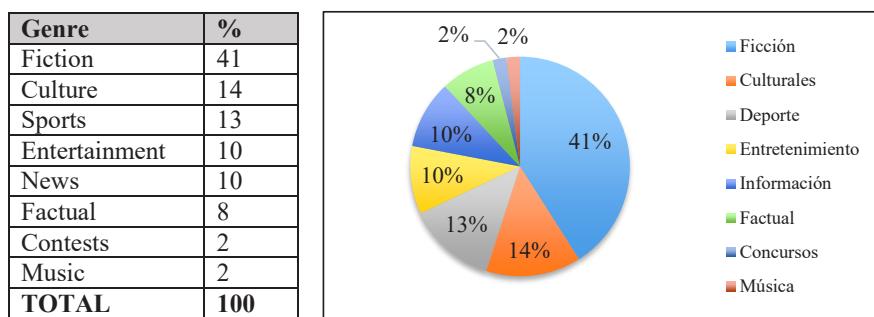


Source: Barlovento Comunicación/KantarMedia.

Atresmedia (26.8%) remains the leader among media groups despite a decrease of two tenths, followed by Mediaset (25.6%, -0.6). The audience share of both groups continues to represent more than half of the total (52.4%), but decreases by one point compared to last year. RTVE confirms its positive trend and is up six tenths (15.3%), while FORTA (Federation of Regional Radio and Television Organizations) gains one tenth (8.4%). Unidad Editorial (2.6%) and Squirell Media (2.5%) each lose one tenth.

Fiction continues to be the genre with the highest presence across all channels, with results identical to those of 2022 (41%), followed by cultural programmes (14%) and sports (13%), which also repeated the results of the previous year. Entertainment, on the other hand, loses seven points (10%) and falls to fourth place. Fiction is also the genre with the highest average audience share (38%), mainly thanks to thematic pay channels (49%).

Graph 2. Genres in TV programming



Source: Barlovento Comunicación/KantarMedia.

1.2. Pay TV and VoD platforms in Spain in 2023

DTT (Digital Terrestrial Television) continues to be the main distribution system for television content in Spain, but it decreases again compared to the previous year (71.7%, -0.6) and sets a new historical low due to the increase in viewing through pay TV (IPTV, cable, satellite and/or OTT), which also reaches a record high (28.3%, +0.6) due to the growth of the IPTV system (19%, +1.3).

The 79 traditional pay TV channels, a form of television that has been gaining viewers since 2013, maintain their positive trend and reach a new annual milestone: 10.4% (+0.6). The main novelty among the top ten most-watched pay TV channels in 2023 is the replacement of TNT by Warner TV, which has announced the inclusion of an extensive catalogue of flagship titles from the prestigious Warner Bros. Studio, thus aligning itself with the rest of Warner's channels in Europe.

Table 2. Pay television channels in Spain

10 most watched pay TV channels in Spain			
Channel	Genre	Source	% Pay ³
LALIGA TV por M+	Soccer	Spain	3,1
DAZN LaLiga	Soccer	Spain	3,1
Fox	Fiction	USA	2,7
AXN	Fiction	USA	2,6
Warner TV	Fiction	USA	2,3
Canal Hollywood	Film	USA	2,3
Calle 13	Fiction	USA	1,9
Liga de campeones por M+	Soccer	Spain	1,8
Comedy Central	Fiction	USA	1,7
Vamos por M+	Sports	Spain	1,5

Source: Barlovento Comunicación/KantarMedia

The most important international VoD platforms in Spain are Netflix, Amazon Prime Video, Disney+, HBO Max (Warner Bros. Discovery), DAZN, Apple TV+, SkyShowtime, RakutenTV, Lionsgate+ (Starz) and Pluto TV (Paramount). The most relevant Spanish platforms are Movistar+ and Movistar+ Lite (Telefónica), RTVE Play, Atresplayer, Mitele Plus and Filmin.

1.3. Sources of financing for the audiovisual sector

Advertising investment grew by 2.4% in the first nine months of 2023. However, investment in “Television”, the second largest area after “Digital”, decreased to 1,121.4 million euros, 2.3% less than in the same period of the previous year. The advertising investment of the group of national open broadcast televisions decreased by 2.5% (1,004.1 million), thus obtaining a market share of 89.4% (-0.1%). 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, decreased by 3.4% and 3%, respectively, compared to the same period of the previous year. Nevertheless, the former reached 463.7 million; while the latter had an advertising turnover of 465.5 million, with a market share of over 40% (41.3% and 41.5% respectively). On the contrary, the investment of the regional television group increased by 3.9% (from 62.8 million), with a market share of 5.6% (+0.3). On the other hand, pay channels continued their negative trend and showed a decrease of 4.2% (52.9 million), bringing their market share to 4.7% (-0.4).⁴

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

⁴ For more information, see <https://www.infoadex.es/home/inversion-publicitaria-crece-primeros-nueve-meses-2023/>

1.4. Communication Policies

The regional elections in May brought about important changes in the governments of the regional administrations and in the management teams of the regional television stations. For example, Radio Televisión Canaria (RTVC) and Corporación Aragonesa de Radio y Televisión (CARTV) have new general directors, as does the Balearic channel IB3. In their respective inaugurations, all have expressed their intention to launch a content platform to boost television consumption.

Corporació Catalana de Mitjans Audiovisuals (CCMA) anticipated these types of initiatives with the launch of 3Cat, the platform that integrates its various media outlets (TVC and Catalunya Ràdio). This new brand of Catalan audiovisual content aims to reformulate the classic structure of television and radio to include podcasts, videopodcasts, and exclusive television programs.

1.5. Digital and mobile connectivity infrastructure

The “Digital Decade 2023 Report”, published by the European Commission, highlights that Spain is at the forefront of fiber optic deployment in the European Union, standing 35 points above the EU average despite its large size and orography. The country leads in the adoption of ultra-fast broadband - mainly fiber optic - and in coverage of very high-capacity networks. Over the last legislature, more than 2,000 million euros have been invested in the universalisation of digital infrastructures - fixed and mobile - within the framework of the Digital Spain Agenda. Mainly aimed at closing the digital gap in ultra-fast connectivity via fiber optics and satellite and deploying 5G technology networks, with a special focus on rural areas.

2. Analysis of the year: national and Ibero-American premiere fiction on open TV

The 98 premieres of 2023 (20 more than in 2022) mark a milestone in the production of television fiction in Spain with a figure never achieved before, comprising 34 titles for linear broadcasting (16 national and 18 regional) and 64 for streaming. Conversely, Ibero-American fiction suffers yet another year, although it offers one more title than the previous year (seven).

TVE increases its contribution with 16 titles (10 in 2022), which are also offered in streaming on RTVE Play or other OTT platforms after their premiere on La1, with some variables in the programming to enhance their profitability. For example, the release of the first two episodes of *Los Pacientes del Doctor García* on La1 and the premiere on Prime Video from the third episode onwards, or the launch on RTVE Play of the youth series *Ser o No Ser (To Be or Not To Be)*. Tele5's four titles constitute

an extraordinary event, in a year in which this channel has drastically modified its offer, reducing its reality TV shows and betting on other genres which, like fiction, have not quite taken off on its pay platform, Mitele Plus. This strategy contrasts with that of Atresmedia, which has reserved all its fictions for broadcast on Atresplayer, except for the successful daily serial *Amar Es para Siempre* (Antena3).

TABLE 1. Premiere fictions shown in 2023 on state channels

PREMIERE NATIONAL TITLES - 16	PREMIERE FOREIGN TITLES - 6
La1	Divinity
1. <i>Cuéntame Cómo Pasó</i> (serie)	1. <i>Los Miserables</i> (telenovela)
2. <i>Laura y Sus Misterios</i> (TV Movie)	2. <i>Ana de Nadie</i> (telenovela)
3. <i>4 Estrellas</i> (serial)	
4. <i>La Promesa</i> (serial)	Nova
5. <i>La Caza. Guadiana</i> (serie)	3. <i>Quererlo Todo</i> (telenovela)
6. <i>Los Pacientes del Dr. García</i> (serie)	4. <i>La Mujer del Diablo</i> (telenovela)
7. <i>Salón de Té la Moderna</i> (serial)	5. <i>La Herencia</i> (telenovela)
8. <i>Servir y Proteger</i> (serial)	6. <i>Vencer el Pasado</i> (telenovela)
9. <i>Fuerza de Paz</i> (serie)	
Tele5	
10. <i>La Que Se Avecina</i> (serie)	
11. <i>Entrevías</i> (serie)	
12. <i>Escándalo, Relato de una Obsesión</i> (serie)	
13. <i>Mía Es la Venganza</i> (serial)	
14. <i>Desaparecidos</i> (serie)	
Antena3	TOTAL PREMIERE TITLES: 22
15. <i>Amar Es para Siempre</i> (serial)	
Divinity	
16. <i>Mía Es la Venganza</i> (serial)	

Source: Obitel España

Despite the impact of streaming on the decline in linear television audiences, it should be noted that the rebroadcasting of free-to-air premieres on platforms monetizes fictions with unsatisfactory audience results, such as *Entrevías* or *Escándalo, Relato de una Obsesión* (Tele5 and Netflix). The premiere of some series on free-to-air channel and their transfer to platforms after the second or third episode, such as the comedy *La Que Se Avecina* (Tele5) or the aforementioned historical drama *Los Pacientes del Doctor García*, is another rising strategy. Moreover, OTTs' catalogues also rescue fictions that, despite their audience success on their respective channels, were destined to fall, sooner or later, into oblivion.

As in previous years, reruns typically take on various modalities, including repetitions aimed at filling programming slots during periods of lower viewership

throughout the year. Another common strategy among Spanish channels is the combination of each new episode with a rerun; a practice systematically employed by *La Que Se Avecina* on Tele5 after airing previously on Prime Video.

The stability of regional fiction is confirmed by the 19 premieres in 2023 (one more than in 2022), among which the prominence of drama stands out, with 11 titles, to which four dramedies should be added. Unlike national premieres, fiction set in the past continues to maintain a significant presence on FORTA channels, with 13 titles, including two TV movies from TV3, *Quico Sabaté*, *Sense Destí* and *Mirò*, and one from À Punt, *L'Alqueria Blanca*. This last long-running Valencian fiction has explored the serial format of daily broadcasting throughout 2023 (season 15), until it returned to its traditional Sunday programming in October, once again transformed into a series format (season 16). Also noteworthy are the two co-productions with Portugal by Galician TVG: the drama *Faro. O Reencontro* and the thriller *Motel Valkiria*.

TABLE 1b. Premiere fictions exhibited in 2023 on regional channels

PREMIERE REGIONAL TITLES - 18	PREMIERE FOREIGN TITLES - 1
TV3	RTVC
1. <i>Quico Sabaté, Sense Destí</i> (TV Movie)	1. <i>Fuego Ardiente</i> (telenovela)
2. <i>Cites Barcelona</i> (serie)	
3. <i>Això No És Suècia</i> (serie)	
4. <i>Bojos per Molíere</i> (serie)	
5. <i>Com Si Fos Ahir</i> (serial)	
6. <i>Mirò</i> (Tvmovie)	
À Punt	
7. <i>Després de Tu</i> (serie)	
8. <i>L'Alqueria Blanca</i> (serial)	
9. <i>L'Alqueria Blanca</i> (serie)	
TVG	
10. <i>Saudade de Ti</i> (serial)	
11. <i>Faro. O Reencontro</i> (serie)	
12. <i>Artemisa</i> (serie)	
13. <i>Motel Valkiria</i> (serie)	
IB3	
14. <i>Closed Bar</i> (serie)	
15. <i>Llim</i> (miniserie)	
ETB1	
16. <i>Irabaxi Arte!</i> (serie)	
RTVC	
17. <i>Canarias de Leyenda</i> (serie)	
3cat	
18. <i>La Mirada de la Fiona</i> (serie)	TOTAL REGIONAL TITLES: 19

Source: Obitel España

As for reruns, the serials *L'Alqueria Blanca* and *El Faro* continue to be rebroadcast on some regional channels (on RTVC this year), albeit intermittently. À Punt, successor to the now defunct Canal9, has also rescued some seasons of *L'Alqueria Blanca* broadcast some years ago by its predecessor. TVG offers its fictions on AGalega, the OTT of the CRTVG group; TV3 on 3Cat and ETB1 on Primeran.

As can be seen in table 2, the 16 national premieres represent a significant increase after last year's historical low (10 titles), although competition from streaming places the open offer at a considerable distance from the last year of the previous decade (24 titles in 2019). However, even though the seven serials aired in 2023 surpass even 2019's offer (six titles), the airtime this year (798 hours and 15 minutes) evidences the gradual decrease in both the number of chapters/episodes and the length of broadcasts.

The stabilization of the number of series since 2020 at eight titles (except for the mentioned decrease in 2022), half of those premiered in 2019 (16 series), confirms the migration of this format to streaming platforms; but also the relevance of serials in linear programming. As in previous years, the contribution of other formats of national fiction premieres remains practically negligible, with only one miniseries.

Table 2. Formats of new national fiction in 2023 and their evolution over a five-year period

Format	Titles						Hours					
	2019	2020	2021	2022	2023	Total	2019	2020	2021	2022	2023	Total
Serial	6	5	5	3	7	26	997:15	969:00	754:55	480:00	747:35	3948:45
Series	16	8	8	5	8	45	179:30	61:10	70:35	73:30	48:00	432:45
Miniseries	1	0	0	1	0	2	3:30	0:00	0:00	3:00	0:00	6:30
Tvmovie	0	0	0	1	1	2	0:00	0:00	0:00	1:30	2:40	4:10
Docudrama	1	0	0	0	0	1	14:00	0:00	0:00	0:00	0:00	14:00
Others	0	0	1	0	0	1	0:00	0:00	0:00	0:00	0:00	0:00
Total	24	13	14	10	16	77	1194:15	1030:10	825:30	558:00	798:15	4406:10

Source: Obitel España

The 19 premiere titles of regional fiction allow the total (national and regional) to overcome the steep decline of the last five years, reaching 34 premieres in 2023 (14 titles more than in 2022). The similarity between regional and national channels in programming strategies combined with streaming has expanded the space dedicated to serials, with 10 proposals that constitute the highest figure of the five-year period.

Table 2a. Formats of new national and regional fiction in 2023 and their evolution over a five-year period

Format	Titles						Hours					
	2019	2020	2021	2022	2023	Total	2019	2020	2021	2022	2023	Total
Serial	7	7	6	6	10	36	1102:15	1035:50	860:55	742:40	977:35	4719:15
Series	29	20	20	14	19	102	314:50	169:00	168:35	150:30	122:15	925:10
Miniseries	2	4	1	3	2	12	6:30	12:20	1:40	9:10	4:40	34:20
Tvmovie	3	0	3	4	3	13	4:40	0:00	4:25	6:30	6:00	21:35
Docudrama	1	0	0	0	0	1	14:00	0:00	0:00	0:00	0:00	14:00
Others	1	0	0	1	0	2	9:10	0:00	0:00	2:40	0:00	11:50
Total	43	31	30	28	34	166	1451:25	1217:10	1035:35	911:30	1110:30	5726:10

Source: Obitel España

The number of airtime of the 16 premieres of national fiction this year amounts to 798 hours and 15 minutes (558 hours in 2022), which represents 69% of the total of Ibero-American fiction. One Colombian telenovelas, another from the United States, three Mexican ones and a co-production between the latter two countries account for the remaining 31%, representing a total of 365 hours and 40 minutes of airtime.

Table 3. State fiction premieres in 2023: countries of origin

Country	Titles	%	Hours	%
NATIONAL (overall)	16	73	798:15	69
OBITEL COUNTRIES (total)	6	27	365:40	31
Argentina	0	0	0:00	0
Brazil	0	0	0:00	0
Chili	0	0	0:00	0
Colombia	1	5	42:40	4
Ecuador	0	0	0:00	0
Spain	16	73	798:15	69
US Hispanic	1	5	54:45	5
Mexico	3	14	242:15	21
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-PRODUCCIONS (total)	1	5	26:00	2
National Co-productions	0	0	0:00	0
Co-productions Countries Obitel	1	5	26:00	2
TOTAL	22	100	1163:55	100

Source: Obitel España

In addition to the 34 titles of original fiction broadcasted by national and regional channels, this year also includes seven Ibero-American telenovelas, which represent 29% of the airtime (450 hours and 40 minutes) compared to 71% of the Spanish total

(1,110 hours and 29 minutes). Only one of the aforementioned soap operas features on a regional channel (RTVC): the Mexican *Fuego Ardiente*, which raises to four the number of Spanish premieres from the Aztec country, supplemented by the co-production with the United States by TelevisaUnivision, *La Mujer del Diablo*.

The FORTA channels' offer includes in 2023 a co-production between Galician TVG and Portuguese RTP1 (*Moltel Valkiria*)⁵.

Table 3a. State and regional premiere fiction in 2023: countries of origin

Country	Titles	%	Hours	%
NATIONAL (overall)	34	83	1110:30	71
OBITEL COUNTRIES (total)	7	17	450:40	29
Argentina	0	0	0:00	0
Brazil	0	0	0:00	0
Chili	0	0	0:00	0
Colombia	1	2	42:40	3
Ecuador	0	0	0:00	0
Spain	33	78	1095:30	70
US Hispanic	1	2	54:45	4
Mexico	4	10	327:15	21
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-PRODUCTION (total)	2	7	41:00	3
National Co-productions	1	5	15:00	1
Co-productions Countries Obitel	1	2	26:00	2
TOTAL	41	100	1561:10	100

Source: Obitel España

The contribution of the seven national serials to the airtime of original fiction is extremely high (43.8%), in line with the increasing shift from series to streaming mentioned in various parts of this chapter. However, the weight of the serial format in premiere fiction increases exponentially considering that they represent 93.7% of airtime (747 hours and 35 minutes) compared to the 6% dedicated to series (48 hours). The difference in presence on schedules of both formats widens even further when considering the contribution of Obitel, as the six soap operas aired by national channels represent 100% of the time dedicated to serials (365 hours and 40 minutes).

⁵ Regarding domestic production, four FORTA channels (Televisión de Galicia, Telemadrid, Castilla La Mancha and Televisión de Asturias) as well as Canal Extremadura have co-produced this year's *Faro. O Reencontro*. It is a spinoff of the serial *El Faro* (2013-2016), one of the most repeated fictions among this group of channels.

TABLE 4. Formats of national fiction and Obitel exhibited in 2023

Format	Titles				Hours			
	National	%	Other Obitel	%	National	%	Other Obitel	%
Serial	7	43,8	6	100,0	747:35	93,7	365:40	100,0
Series	8	50,0	0	0,0	48:00	6,0	0:00	0,0
Miniseries	0	0,0	0	0,0	0:00	0,0	0:00	0,0
Tvmovie	1	6,3	0	0,0	2:40	0,3	0:00	0,0
Docudrama	0	0,0	0	0,0	0:00	0,0	0:00	0,0
Others	0	0,0	0	0,0	0:00	0,0	0:00	0,0
Total	16	100,0	6	100,0	798:15	100,0	365:40	100,0

Source: Obitel España

The indicated proportions are significantly altered when considering the total by formats of national and regional premiere fiction, even though 88% of broadcasts correspond to the 10 serials of the total Spanish content (977 hours and 35 minutes). The contribution of the miniseries and the three TVmovies of 2023 remains very modest (0.3% and 0.5% respectively), due to their short duration.

TABLE 4a. National and regional fiction formats Obitel exhibited in 2023

Format	TITLES				HoURS			
	National	%	Other Obitel	%	National	%	Other Obitel	%
Serial	10	29,4	7	100,0	977:35	88,0	450:40	100,0
Series	20	58,8	0	0,0	123:35	11,1	0:00	0,0
Miniseries	1	2,9	0	0,0	3:20	0,3	0:00	0,0
Tvmovie	3	8,8	0	0,0	6:00	0,5	0:00	0,0
Docudrama	0	0,0	0	0,0	0:00	0,0	0:00	0,0
Others	0	0,0	0	0,0	0:00	0,0	0:00	0,0
Total	34	100,0	7	100,0	1110:30	100,0	450:40	100,0

Source: Obitel España

The twenty-third and final season of *Cuéntame Cómo Pasó* leads the audience ratings for national fiction with 1,405,000 viewers (13.2% share), a figure significantly lower than the 1,713,000 viewers (15.9% share) obtained by *Entrevías*, which topped the ranking in 2022. This Tele5 series, last year's revelatory premiere, placed its third season in eighth position, with 953,000 viewers (10% share), despite the excellent reviews received by the first two seasons. The other thriller in the line-up, *La Caza Guadiana*, precedes it in seventh position (957,000 viewers and 7.6% share).

Once again, Spanish viewers' attachment to past big hits is reflected in the second and third positions of the top 10 of 2023, occupied respectively by the two TVmovies from La1, *Laura y sus Misterios*, a spin-off of *Los Misterios de Laura* (La1, 2008-2014), and the 12th and 13th seasons of the long-running series on Antena3, *Amar Es Para Siempre*, with 1,073,000 (10.3% share) and 1,058,000 viewers (11% share)

respectively. However, the opening episode of the fourteenth season of *La Que Se Avecina* (Tele5) did not fare as well, dropping to sixth place, perhaps due to the immediate availability of the complete season on Prime Vídeo.

The success of serials is corroborated by the fourth and fifth positions of two contributions from La1 to this format: *4 Estrellas* (1,057,000 viewers and 8.4% share) and *La Promesa* (1,031,490 viewers and 11.3% share). Closing the annual ranking are the series *Escándalo*, *Relato de una Obsesión* (936,000 viewers and 8.1% share) and *Los Pacientes del Doctor García* (927,000 viewers and 8.0% share), an adaptation of the eponymous novel by the prematurely deceased writer Almudena Grandes.

TABLE 5. 10 National most viewed titles in 2023

Title		Channel	Producer	Format/Genre	Chap./ep.	Time slot	Rating	Share	Thousands
1	<i>Cuéntame Cómo Pasó</i>	La1	Ganga Producciones (ES)	Serie/Drama	6	Prime time	3,0	13,2	1.405.000
2	<i>Laura y sus Misterios</i>	La1	RTVE y Veranda TV (ES)	Tvmovie/Policíaco	2	Prime time	2,3	10,3	1.073.000
3	<i>Amar Es para Siempre</i>	Antena3	Diagonal TV (ES)	Serial/Drama	251	Tarde	2,3	11,1	1.058.000
4	<i>4 Estrellas</i>	La1	RTVE y Good Mood (ES)	Serial/Comedia	134	Prime time	2,3	8,4	1.057.000
5	<i>La Promesa</i>	La1	StudioCanal, Bambú Producciones y RTVE (ES)	Serial/Drama	263	Tarde	2,2	11,3	1.031.000
6	<i>La Que Se Avecina</i>	Tele5	Contubernio Films (ES)	Serie/Comedia	1	Prime time	2,1	10,6	975.000
7	<i>La Caza. Guadiana</i>	La1	DLO Producciones	Serie/Thriller	8	Prime time	2,1	7,6	957.000
8	<i>Entrevías</i>	Tele5	Alea Media (ES)	Serie/Thriller	8	Prime time	2,1	10,0	953.000
9	<i>Escándalo, Relato de una Obsesión</i>	Tele5	RTVE y Alea Media (ES)	Serie/Thriller	8	Prime time	2,0	8,1	936.000
10	<i>Los Pacientes del Dr. García</i>	La1	Diagonal y DAPlaneta (ES)	Serie/Drama	2	Prime time	2,0	8,0	927.000
Total national productions: 10				Foreign original scripts:0					
100%				0%					

Source: Obitel España

TV3's six premieres top an annual ranking of regional fiction are characterized by the diversity of its formats (six series, two serials and two TVmovies), to the point of the ranking is led by a TVmovie: *Quico Sabaté* (389,000 viewers and 19.5% share). Along with the success of TV3's two biopics, the aforementioned *Quico Sabaté* and *Mirò*, about the painter Joan Mirò (207,000 viewers and 11.1% share), the most outstanding feature of this group of channels is surely the presence of the three Catalan

dramedies: *Cites Barcelona* (295.000 viewers and 15.5% share) and *Això no és Suècia* (289,000 viewers and 14.6% share), on TV3, and *Després de Tu* (85,000 viewers and 5.3%), on À Punt. Closing the ranking are two TVG productions: the serial *Saudade de Ti* (64,000 viewers and 9.0% share) and the aforementioned series *Faro. O Reencontro* (59,000 viewers and 7.8% share), which occupy the eighth and tenth positions respectively, while À Punt's serial *L'Alqueria Blanca* is in ninth place (63,000 viewers and 6.0% share).

TABLE 5a. 10 Regional most viewed titles in 2023

Title		Channel	Producer	Format/Genre	Chap./ep.	Time slot	Rating	Share	Thousands
1	<i>Quico Sabaté, Sense Destí</i>	TV3	Minimal Films y TV3 (ES)	TVmovie/Biopic	1	Prime time	5,2	19,5	389.000
2	<i>Cites Barcelona</i>	TV3	Arca Audiovisual (ES)	Serie/Dramedia	6	Prime time	3,9	15,5	295.000
3	<i>Això No És Suècia</i>	TV3	Nanouk Films, Funicular Films, Anagram Sweden, TVC (ES)	Serie/Dramedia	8	Prime time	3,8	14,6	289.000
4	<i>Bojos per Molière</i>	TV3	Veranda y TV3 (ES)	Serie/Drama	8	Prime time	3,3	11,7	252.000
5	<i>Com si fos ahir</i>	TV3	TVC (ES)	Serial/Drama	213	Tarde	3,1	17,7	233.000
6	<i>Mirò</i>	TV3	IB3 Televisió, ICEC, Setmàgic Audiovisual y TV3 (ES)	TVmovie/Biopic	1	Prime time	2,7	11,1	207.000
7	<i>Després de Tu</i>	À Punt	Albena Produccions y Minoria absoluta (ES)	Serie/Dramedia	18	Prime time	1,7	5,3	85.000
8	<i>Saudade de Ti</i>	TVG	Voz Audiovisual (ES)	Serial/Drama	62	Prime time	2,4	9,0	64.000
9	<i>L'Alqueria Blanca</i>	À Punt	Trivision y Zenith TV (ES)	Serial/Drama	60	Tarde	1,3	6,0	63.000
10	<i>Faro. O Reencontro</i>	TVG	Atlántida Media (ES)	Serie/Drama	10	Prime time	2,2	7,8	59.000
Total national productions: 10				Foreign original scripts: 0					
100%				0%					

Source: Obitel España

3. VoD monitoring 2023

Digital platforms continue to integrate advertising and update their prices with new rates. Regarding content, VoD focuses on incorporating diversity, especially in terms of gender, with female characters who strive to regain control of their lives, unravel police intrigues, or navigate the initiation stage to adulthood as best they can.

3.1. VoD Platform Market in 2023

The third and last wave of Barlovento Comunicación's TV-OTT Barometer in 2023 gives Prime Video (53%) the leadership of the platform ranking, followed by Netflix (46.1%), Disney+ (31%), HBO Max (23.5%) and Movistar+ (16.3%). The three waves of GECA's OTT Barometer 2023 and SigmaDos30's VOD reports for the last three months (September, October and November) confirm these same five positions. However, the third wave of the General Media Study (EGM) and the Household Panel of the National Commission of Markets and Competition (CNMC) attributes leadership to Netflix in the first half of 2023. According to the first report, Netflix is followed by Prime Video, Disney+, HBO Max and Movistar+; while the second ranking order is Prime Video, Movistar+, HBO and Disney Plus.

The "Entertainment on Demand (EoD)" study by Kantar's Worldpanel division on the Spanish streaming market indicates that Netflix lost one million users during the first quarter of 2023 as a result of its new strategy against shared accounts. However, the company still has reasons to defend its new policy: Kantar indicates that two thirds of the one million lost were not subscribers, but users using someone else's account, which represents a decrease in potential audience but not an economic loss for the company. In any case, the OTT does not seem to be afraid of losing users as long as it retains a substantial number of subscribers and has decided to implement its anti-account sharing plan worldwide.

Following in Netflix's footsteps, other platforms have also embraced advertising. In November, commercials came to Disney+, which launched its new ad-supported subscription model, months after announcing a reduction in production, and the removal of more than 50 original titles in the face of losses and a drop in subscribers in the millions. Amazon Prime Video is also on board with the inclusion of advertising and has already announced a new ad-supported fee for 2024. On the other hand, HBO Max and Apple TV have opted to increase their subscription prices (HBO Max by one euro and Apple TV+ by three).

While the established platforms are implementing different strategies to solidify their position in the market, new players are joining the Spanish SVoD scene. The latest addition has been SkyShowtime, the joint venture between Comcast and Paramount Global, which thanks to a launch offer like HBO Max - half price forever for subscribers who signed up during the launch period - gained almost one in three new subscribers in the first quarter of 2023 (32.6%), according to the aforementioned Kantar study. The first wave of GECA's OTT Barometer confirms that, after just one month of existence and thanks to its launch promotion, SkyShowtime reached 4.5% user penetration, a figure very close to that of Apple TV+ (4.8%).

3.2. Offer of local VoD platforms in 2023

Movistar+ appears in the Top 5 of the aforementioned Barlovento Comunicación and GECA reports. Atresplayer (6.4%), Movistar+ Lite (5.4%), Filmin (4.5%) and Mitele Plus (3.5%) respectively occupy the seventh, eighth, eleventh and twelfth positions in the ranking according to the last two waves of GECA's OTT Barometer.

Movistar Plus+, the Spanish leading platform, presented its renewed television service, which will no longer be available only to customers of its telephone operator as it has been until now, but will be open to the entire public in OTT mode. Atresplayer Premium, Atresmedia Televisión's exclusive content platform, was renamed Atresplayer, and it presented a new interface with important new features and content. In addition to the free content with its corresponding commercials, Atresplayer will continue to offer exclusive content through its subscription plan, which will continue to cost €4.99 per month and which now includes an advert at the start of each viewing, as Movistar Plus+ and MiTele Plus already do (in this case there are three adverts). In addition, they are launching a family plan for €7.99 a month, which will allow access to the complete catalogue for three people at the same time and without any type of advertising, and will be integrated as a channel in Prime Video thanks to the agreement with this OTT. It is a strategy that demonstrates the changes undergone by an industry that no longer only buys content from third parties, but also acquires productions from its main competitors in order to increase economic profitability, even if this sometimes means relinquishing the principle of "exclusivity" on which the business was built.

In relation to free and nationwide OTTs, RTVE Play is the platform with the highest penetration in Spanish households, according to the third wave of Barlovento Comunicación's TV-OTT Barometer and the three waves of GECA's OTT Barometer. It is followed by Atresplayer, Pluto TV and Mitele according to both barometers.

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

The 65 streaming titles released this year (50 in 2022) bear witness to the commitment to fiction of both Spanish and foreign platforms operating in Spain, in a production context characterized by the rapid succession of premieres. In fact, the renewal for a new season is becoming an exceptional event, reserved for a few series with a lot of success. For example, *Élite*, *Valeria* and *Sky Rojo* on Netflix; *El Internado*, *Las Cumbres* and the aforementioned *La Que Se Avecina* on Prime Video.

The general stabilization of the number of chapters/episodes, between six and eight per season, and the length of each episode at around 50 minutes, are also characteristics shared by the OTTs' premieres in 2023, while at the same time raising some theoretical questions about formats, precisely because of the difficulty of

distinguishing between episodes and chapters; but, above all, between series and miniseries.

The increase in premieres in 2023 is mainly due to the contribution of Atresplayer (15 in 2023 and seven in 2022), Netflix (15 in 2023 and nine in 2022) and Prime Video (12 in 2023 and six in 2022), one of which is a co-production with Portugal (*Operation Black Tide*). Movistar+ is committed to stability with the same number of titles as last year (nine). Disney+ also maintains its commitment to Spanish fiction with two titles in 2023, one of which is a co-production with the United States (*Tú También Lo Harías*). Also noteworthy are the four titles from SkyShowtime (following the departure in March of Lionsgate+) and the three contributions from Filmin, showcasing the platform's intention to enhance its own television fiction production, initially emerging as a film distributor. Starzplay contributes one title to the mix.

**TABLE 7. National fictions and co-productions exhibited in 2023
on VoD systems**

NATIONAL PREMIERES	PREMIERE CO-PRODUCTIONS
Prime Vídeo	Disney+
1. <i>Culpa Mía</i> (Tvmovie)	1. <i>Tú También Lo Harías</i> (series) Spain-USA
2. <i>Días Mejores</i> (series)	
3. <i>El Internado. Las cumbres</i> (series)	Prime Vídeo
4. <i>El Pueblo</i> (series)	2. <i>Operación Marea Negra</i> (series) Spain-Portugal
5. <i>Escándalo</i> (miniseries)	
6. <i>Los Farad</i> (series)	
7. <i>Memento Mori</i> (series)	
8. <i>Romancero</i> (series)	
9. <i>Sin Huellas</i> (series)	
10. <i>Urban. La Vida Es Nuestra</i> (series)	
11. <i>La Que Se Avecina</i> (series)	
Atresplayer	
12. <i>Entre Tierras</i> (series)	
13. <i>Honor</i> (serie)	
14. <i>Las Noches de Tefía</i> (series)	
15. <i>Camilo Superstar</i> (series)	
16. <i>Cardo</i> (series)	
17. <i>Cristo y Rey</i> (series)	
18. <i>Déjate Ver</i> (series)	
19. <i>La Caja de Arena</i> (series)	
20. <i>La Red Púrpura</i> (series)	
21. <i>Los Protegidos ADN</i> (series)	
22. <i>Nacho</i> (series)	
23. <i>Sentimos Las Molestias</i> (series)	
24. <i>UPA Next</i> (series)	
25. <i>Vestidas de Azul</i> (series)	
26. <i>Zorras</i> (series)	
Disney+	
27. <i>La Chica Invisible</i> (series)	
Filmin	
28. <i>B-Siders</i> (series)	
29. <i>Putos Modernos</i> (sketch)	
30. <i>Selftape</i> (series)	
HBO Max	

Source: Obitel España

Unlike broadcast premieres, the 25 suspense titles (thriller and detective) bear witness to the significance of this genre in the VoD catalog, aligning with international

trends particularly on Netflix, with seven of the 12 releases offered this year by the North American platform. Drama makes up the rest of this OTT's productions, as is the case with Atresplayer. Another rising trend, youth drama, is included in this latest platform with *Cardo*, *UPA Next* and *Los Protegidos* (the latter with fantasy elements), as well as the seventh season of *Élite* on Netflix, *Culpa Mía* on Prime Vídeo and the aforementioned *Ser o no Ser* on RTVE Play. The relevance of young characters in other genres, such as thrillers like *La Chica Invisible* (Disney+) or *La Chica de Nieve* (Netflix), demonstrates the OTTs' desire to capture this target audience.

3.4. Narrative features of VoD in 2023

The breadth of the offer, the constant hybridization of genres and formats and the variety of the themes addressed prevent the systematization of a set of narrative characteristics applicable only to VoD. This is because, except for serials, the rest of the fiction offered in streaming does not particularly differ from linear fiction and because of the growing interrelation between the different modes of production in a system that, with the current structure, is bound to diversify its business structure to survive. Consider, for example, the strategies adopted by free-to-air channels to maximise the impact of their premieres, such as launching one or two episodes and shifting the subsequent ones to paid platforms (see section 2). Both free-to-air fiction and VoD productions are forced to combat obsolescence in order to guarantee their continuity.

The redefinition of social class and gender relations, and the gradual inclusion of diversity in all its manifestations (sexual, cultural, origin, etc.), shape the main narrative motifs shared by most of today's Spanish fiction. Regarding general characteristics, the prominence of female characters stands out, along with the emphasis on space and the construction of an unstructured temporality, aimed at enhancing both the rhythm and the narrative complexity of the different productions.

4. Interactivity and audience participation

In 2023, some TV fiction continued to encourage interactivity and audience participation by expanding their narrative universes. This year's paradigmatic example has been *UPA Next*, the sequel to *Un Paso Adelante* made almost two decades later, featuring some of the former students who have now become teachers. This Atresmedia series previewed its first episode the 25th of December 2022, as a Christmas present for Atresplayer subscribers; however, it did not release the next seven episodes until just over four months later. To enhance its launch, the platform developed an impressive transmedia strategy so that fans could enjoy an extended and

innovative experience, with exclusive content beyond each episode and across different windows.

However, the promotional campaign had started much earlier, in April 2022, with a casting to select the protagonists of the series; that is, the new students of the dance school. The search was carried out through challenges on TikTok and Instagram designed by Toni Espinosa, choreographer *UPA Next*, which led to a face-to-face casting, where participants were evaluated by the choreographic team of the fiction. 500 people participated in the virtual casting and their videos reached more than 4 million views. Only 27 out of the initial 500 participants were called to the in-person casting, where they had to face four tests to become one of the five winners. Finally, the five winners, as well as the rest of the main cast of the series, were announced on the 14th of July at a huge gathering on ATRESplayer's Twitch channel: *UPA NEXT Reveal Party*.

On the 21st of December 2022, four days before the preview of the first episode, fans of the series had another very special appointment on the Twitch channel: a live meeting with the protagonists. Previously, the series had activated and promoted their official profiles on Instagram, where they shared details about their lives and explained their day-to-day lives, expanding the plots and content of the series with unpublished and exclusive stories from the digital world. The idea was for fans to connect with the characters even before the start of the fiction's broadcasts; but, above all, to capture their attention in the period between the launch of the first episode in December and the remaining seven episodes at the beginning of May 2023.

To this end, the official website of the “Escuela de artes escénicas Carmen Arranz” (“Carmen Arranz Performing Arts School”) was also launched, where series fans could register, as a new student, to enjoy exclusive and unpublished content from inside the legendary academy. The website included several sections that reviewed the school's history, expanded information about the teachers and showed the facilities in detail. In addition, it allowed users to get to know Yolanda better, the school's secretary and the person in charge of explaining the ins and outs of what happened there. Finally, fans were invited to join the show's Telegram channel and not miss any of its updates, while the recovered actors of *Un Paso Adelante* (Miguel Ángel Muñoz, Silvia Cruz and Beatriz Luengo) increased their appearances in the media in order to awake the nostalgia of the fans of the original series and pique the curiosity of the young target audience.

Another transmedia add-on deployed around *UPA Next* was the launch of ATRESplayer's first metaverse experience: *UPA LAND* Dance Academy, a recreation of the *UPA Next* academy on the Roblox platform. It was a music and dance activity, which included games and challenges specially designed to entertain fans and provide them with an extended version of the story. Fans, through their avatars, could recreate the choreographies of the series protagonists, compete in dance

challenges, dress up in the clothes and fashion accessories of the fiction, and interact with the avatars of other characters, such as Lola, Silvia, Luca or Tara.



Source: Atresplayer

The official premiere of the series boosted the activity of the strategies described, integrated with other forms of participation such as, for example, the opportunity to win, through the academy's website and the UPA Land Dance Academy, double tickets to attend the series premiere in Madrid, which was attended by its protagonists.

5. Highlights of the year

The increase in premieres on linear television reflects the *tour de forces* between linear television and streaming, both adversaries and allies, in the battle for the second life of reruns on the platforms of the channels themselves or OTTs. The significant contribution of the public channel La1 (nine out of the 16 titles in 2023) is complemented by the return of Tele5 to its own fiction after the renewal of its management team and reality shows; and also, maybe, by the unsatisfactory performance of its series in its paid version of Mitele Plus, with a historic low of 1.7% according to the GECA consultancy barometer, published on the 8th of November.⁶ On the other hand, Atresplayer holds a prominent position in the ranking of Spanish platforms, despite having a smaller market scale among OTTs, which explains the systematic premiere of all its fiction in its paid version except for the long-running serial *Amar Es Para Siempre*, which has announced its conclusion in March 2024 after 12 seasons on Antena3.

At a time of tremendous uncertainty about the future of free-to-air fiction, the offering of La1 is bolstered by past successes and the replacement of programs with declining audience curves. Thus, the once timeless *Cuéntame Cómo Pasó*, on air

⁶ See <https://www.audiovisual451.com/la-ultima-claquetas-de-cuentame-como-paso-la-mitica-serie-espanola-termina-la-grabacion-de-su-ultima-temporada/>

since 2001, bid farewell leading the annual ranking, after 23 seasons and 413 episodes, with a finale classified by the media as 'shocking and indescribable'.⁷ The two *Laura y Sus Misterios* TVmovies, entitled *Laura y el Misterio de la Novia que Esperó Demasiado* and *Laura y el Misterio de la Paciente Suspicaz*, updated the narrative world of the series *Los Misterios de Laura* with a format previously explored in 2021, about the return of the protagonist to the police investigation field to continue unveiling mysteries in a humorous way. However, there was a lukewarm reception for the first two episodes of one of the most anticipated titles of the year, the aforementioned series *Los Pacientes del Doctor García*, set in the Spanish Civil War and post-war period, which offered the remaining eight episodes on Netflix.

The premiere of the first episode of *La Que Se Avecina* on Tele5, available thereafter in its entirety on Prime Video, represents a similar experience to that of *Los Pacientes del Doctor García*, which also failed to produce the expected audience results despite the impatience with which its fans awaited its fourteenth season. Nonetheless, worse off has been the fate of Tele5's only serial, *Mía Es La Venganza*, which languished on the Divinity channel after being withdrawn from Tele5 after the first 25 episodes. It was Tele5's first attempt to strike back at its rivals, Antena3 and La1, after the cancellation of its flagship show *Sálvame*, the gossip show on air since 2009 which, like the rest of the channel's reality programs, displayed unmistakable signs of exhaustion.

The diversification of formats within the same fiction also holds a prominent place in the offerings of regional channels, with the return of some of their emblematic series. For example, *L'Alqueria Blanca*, which returned to the weekly broadcast on the Valencian channel À Punt after a run of 60 episodes in its serial version, or the comeback of *El Faro*, transformed into a 10-episode series in *Faro. O Reencontro* (TVG). But perhaps the most notable impact achieved by the FORTA channels is the audience and critical acclaim of the TVmovie, *Quico Sabater: Sense Destí* on TV3, the biopic of a member of El Maquis who continued fighting after the establishment of Franco's dictatorship in 1939, directed by the filmmaker Silvia Quer. The dramedy *Això No És Suècia*, about a family whose preconceived idyllic image of the neighborhood they have moved to crumbles, testifies to the Catalan channel's willingness to innovate with this almost documentary-style narrative, also female-led (Mar Coll and Aina Clotet), which has earned the Prix Europa for fiction. The sudden death of the mother unites two noteworthy dramas from À Punt and TVG: *Després de Tu* and *Saudade de Ti* respectively, although intrigue also forms an essential part of the latter, in line with most of the premieres of the Galician channel in recent seasons.

Unlike free-to-air fiction, thrillers prevail in the platforms' offer, with 22 titles out of the 65 premiered in 2023, in an array where other genres less common in recent

⁷ See the article by Esther Mucientes, *El final de Cuéntame, estremecedor e indescriptible*, published in *El Mundo* on the 30th of November 2023. (<https://www.elmundo.es/television/momentvs/2023/11/30/65681f14e85ebe2418b458a.html>)

years also stand out, such as comedy (11 titles). In fact, two comedies that appeal respectively to acid humor and *costumbrismo* lead the offer of the Spanish platform Movistar+, both recorded (*El Otro Lado*) and linear (*Poquita Fé*).⁸

El Cuerpo en Llamas, portraying a local policewoman who murders her partner with the complicity of her lover, has turned this fictionalized version of true crime into one of Netflix's best releases in Spain⁹; a feat it shares with the American OTT thriller *La Chica de Nieve*, which tackles another of fiction's timeless themes: the kidnapping of a little girl. This time around, on Atresplayer, the biopic *Camilo Superstar* stands out, set in the 1970s musical starring the famous pop singer, along with the youth series aimed at raising awareness about bullying, *La Caja de Arena*, sponsored by the ColaCao Foundation. This latter subgenre, which has made a strong comeback on both linear TV and streaming, includes, among other notable contributions due to its pedagogical vocation, the aforementioned *UPA Next* and the Amazon Prime Video film *Culpa Mía*, based on Mercedes Ron's bestselling novel.

In summary of the highlights of the streaming offer, it can be said that that, despite the variety of genres, formats and themes of 2023, the common thread running through most of the productions in the most prolific year for Spanish fiction is the confrontation of the protagonists with their own time, their longings, and their worries.

6. Theme of the year 2023: What is happening to narratives in Ibero-American television fiction?

Spanish television fiction premieres lavished yet another season with a panorama of overabundance, where quantity and convention are observed; but also, an assortment of titles that are diverse in terms of genres, themes and formats, which increase in number when including the production coming from streaming operators. In this opulent scenario, it is not difficult to choose a sample of five original works that stand out for their quality, the interest generated by their protagonists, the novelty of the themes addressed and the uniqueness of their narrative proposals.

La Mesías (Movistar+), created and directed by Javier Calvo and Javier Ambrossi, was premiered in the official section of the San Sebastian Film Festival. It addresses current concerns such as home abandonment, identity, family relationships or the perversion of religious fundamentalism. The story begins in Montserrat, a mountain in Barcelona that attracts attention for its supernatural charge. The narrative draws on the case of Flos Mariae, a freak phenomenon starring a Catholic pop music group in 2014, made up of seven sisters. They viralize eccentric music videos on YouTube to save their mother, who spoke to God and suffers from a malignant tumor.

⁸ See <https://www.loslunesseriefilos.com/2023/12/audiencias-cuantos-espectadores-tienen-series-movistar-2023.html#respond>

⁹ See <https://webgeca.geca.es/nuevo-barometro-ott-de-geca-2/>

La Mesías is the alienated, chaotic and unstable mother of a Catalan family, composed of six cloistered sisters, a father who is as religious as he is disturbing, and two other brothers who flee in search of catharsis and who act as connections between the past and the present of the story. The narrative structure is made up of the puzzle pieces of a plot that intersects three timelines and concludes with an allegorical epilogue.

The abundant stylistic resources, primarily aimed at the construction of the characters, illustrate the visual style. For example, shooting in the round, circular panning shots to depict conversations, the play with light and shadow, or surreal long takes to portray a narcotic rave, among others. Photography is also modified to differentiate between alternative timelines using cold and warm colors, and the syncretic soundtrack and the use of music as a narrative element are highlighted.

El hijo zurdo (Movistar+) is an adaptation of Rosario Izquierdo's homonymous novel. The literary world is evident at the beginning of the episodes with the voice-over of the mother (protagonist of the story) who reads fragments of the book she writes. The genre is human drama, but it applies a vibrant rhythm to synthesize the work in six twenty-minute episodes. Written and directed by screenwriter Manuel Cobos, this award-winning miniseries at Canneseries tells the story of a mother whose son becomes a skinhead in reaction to a dysfunctional family system. The series raises reflections on family, genetic and cultural heritage (the characteristic of being left-handed as an image of anomaly), early motherhood and education.

The family is made up of characters locked in themselves, separated from each other in order to survive. For the father, a politician and the mayor's right-hand man (with whom he also maintains sexual relations), public image is more important than people. The mother fluctuates between stigma and guilt, questioning her identity and redefining her expectations and sense of belonging. The context surrounding the damaged family unit refers to a classist society, corrupted by political favour or religious fervour.

The action of *El Hijo Zurdo* (Movistar+) unfolds in Seville. It shows recognizable spaces of the city, and, at the same time, conventional places are avoided to reflect contradictions. Holy Week is made present through evocations and explicit references, as well as accompanying the protagonist's inner procession as she seeks to atone for her sins and shows her repentance.

The miniseries is formally introspective and composes a distressing atmosphere. It abounds in silences, gestures, glances, waits, close-ups that brush against the mother's face. Transitions between sequences and flashbacks are presented in a novel way, through a vertical format that extends to the present. The soundtrack stands out for its disruptive nature, with music that contrasts with the tragic narration and adds a narrative layer to the story.

El otro lado, created by and starring Berto Romero, which also premiered at the Donostia Zinemaldia, presents an exercise in harmony between horror and

naturalistic comedy, aiming to elicit spontaneous reactions through the concatenation of humour with dramatic sequences and vice versa. It is an innovative and original proposal within the genre. The fiction tells the story of a paranormal journalist who survives in the modern era with his YouTube channel after having worked in programs of the Spanish public broadcasting. Luck leads him to investigate the poltergeist case of an abuser who, even after his death, continues to terrorize his wife and son in their hive apartment in Bellvitge. This synopsis brings to light behaviours of today's world and focuses on the precariousness of the media and the deontology of idealistic journalism. To achieve this, it resorts to a play of mirrors between characters (ethical/sensationalist journalist, good/bad ghost) and genres (it combines a sexual scene with a tense seance, or a policeman holding a poodle licking his face when discovering the owner's corpse with the face devoured by the creature). A chained alternation, which circumvents clichés, surprises and throws the spectator off balance, presenting the series as a closed unit with two timelines set in different spaces. The technical effort is evident in the special effects, which combine practical special effects to support that naturalist tone, and the use of digital technology.

Selftape (Filmin) is created and starred by sisters Joana and Mireia Vilapuig and directed by Bárbara Farré. The title refers to the self-recording method sent to casting directors for the first round of sifting when choosing the performer for a role. In this way, the series proposes a vital reflection from the actress's point of view, resorting to autofiction to relate the experiences of two performer sisters who love each other, but at the same time are rivals. The metafiction occurs because both were popular teenage faces on Catalan television, thanks to the series *Polseres Vermelles* (TV3, 2011-2013).

This narrative fosters themes related to the acting world. It portrays the role of women in this field, their precarious situation, their lack of opportunities and the repercussions of success at an early age. The industry appears as a space where the lack of protection of female intimacy, competition and selfishness rule. The story is, therefore, personal and carefully crafted. The reflexivity is elaborated through an intimate and European aesthetic, which resorts to narrative economy and naturalistic photography. But its main innovation lies in the use of domestic family videos which, inserted through cuts, function as separators between fiction and reality, proposing a metanarrative mechanism aimed at interweaving the past with the present. The archival footage (domestic VHS, real promotional television interviews, casting images and selftapes) enhances the verisimilitude of the story by providing videos of the sisters growing up, performing theatricals, dressing up, reciting, being interviewed on television or playing while laughing. The resource serves as a reminder of vocation (dreams and hopes) and underlies the idea of the transience of life by recreating past moments that will not return.

Déjate ver (Atresplayer), created, written and directed by Álvaro Carmona, is an original science fiction dramedy. It tells the story of a young artist who works as an assistant to Bassil (a mix between Bansky and Damien Hirst), one of the most famous conceptual artists, until he is diagnosed with an early stage of invisibility: he is disappearing through his toe. The doctor prescribes changing his life and admitting his contradictions. This surreal premise helps to frame a story about identity crisis and personal growth, the challenge of accepting oneself to avoid disappearing (metaphorically and literally), in an alternative and hyperbolic, yet recognizable world.

The approach is innovative because it harnesses the dystopian component to parody today's society and directs a satirical social critique against it. It individualizes a general ill to express a superficial and depersonalized society, where social media and the commodification of relationships reign, ultimately threatening self-esteem. The theme exposes the art world and introduces issues such as the concept of authorship, the prevalence of brand value over the artist, the sense of job insecurity, or failure.

The series charts a horizontal plot that runs through all episodes, although there is a meticulous construction of each part. The narrative emphasizes absurd humor and a sense of everyday strangeness thanks to the intellectualization of gags (in the excursion to a village in La Mancha, the protagonist witnesses the phenomenon of "having a Stendhal momento", that is levitating due to cultural richness), the use of irony, elaborate dialogues, and recurring metaphors. All this crystallizes into a hybrid of postmodern costumbrismo with magical realism. The aesthetics are synchronized with the dramaturgy. Camera movement, framing and editing are executed in a meaningful way, making the very form of the series part of the message. An example of this use is the crafting of the episode with a loop structure.

In conclusion, in these distinguished series it can be observed that the predominance of the female gaze is situated in a realistic and contemporary framework, and adopts themes taken from contemporary social problems, with an emphasis on identity and personal progress. The expositive structures are shaped in different temporalities (past and present), explaining the evolution of the characters and actions. There is a noticeable effort to provide genre innovation, originality in the proposals, and differentiated visual styles. The result allows us to glimpse a horizon of narrative prosperity expressed through plural, progressive and personal voices, which assume styles intertwined with influences from foreign production and traces of Spanish identity.