

PORTUGAL DIFFERENT DEMOGRAPHICS AND VIEWING PATTERNS, THE SAME OLD TELEVISION¹

Authors:

Catarina Duff Burnay (<https://orcid.org/0000-0001-7730-1707>)

Pedro Lopes (<https://orcid.org/0000-0002-9283-6117>)

Marta Neves de Sousa (<https://orcid.org/0000-0002-8358-3189>)

João Félix (<https://orcid.org/0000-0002-3433-2877>)

Ana Lúcia Carvalho (<https://orcid.org/0000-0002-3942-6688>)

Introduction

Different demographics and viewing patterns, the same old television. There is an observable current trend of fiction programs migrating from the traditional linear medium to streaming platforms. This model enables new forms of consumption, but also the possibility of extending the content lifespan, with alternative profitability models and a kind of viewing freedom that doesn't require the traditional curation practices of programming directors. In the era of broadcast television, consumption was governed by fixed schedules and the limited availability of channels. Families used to gather to watch programs that were airing at that moment, creating a collective experience. The rise of cable has brought channel specialization, segmented by genres, but still keeping audiences dependent on the programming slots defined by schedulers. Platforms compete to create new content, but it has become increasingly clear that there is a need to grow catalogues with shows that were previously aired on free-to-air television, offering new opportunities for reach and monetization. Series like *Friends* or *Suits* have found new audiences on these platforms, often reaching viewers who did not follow the original broadcasts. Similarly, platform-commissioned productions have started airing on traditional television, in search of a broader audience. This bidirectional movement shows that, irrespective of any differences in the way viewers watch the content, the integration between the two worlds has increased, with a different approach to how generations and consumption habits are managed. Millennials and Generation Z grew up in a digital environment and value flexibility and content personalization, while older generations remain loyal to certain routines, preferring the structured programming of generalist television. The future, as mentioned in the title, points to an ever growing convergence between traditional television and streaming platforms. Smart TVs enable the integration of platforms directly into their remotes with internet access,

¹ The Portuguese team would like to thank CAEM, GfK and Marktest-MediaMonitor for their cooperation in gathering and processing the necessary data.

thus creating a model that integrates free-to-air, cable, and other platforms, while streaming platforms are now releasing weekly episodes and investing in live content, such as sports events. In short, the so-called death of television has been clearly exaggerated, as it remains a constant presence in family life as one of the main sources of information, education, and entertainment, maintaining its relevance and adaptability in an increasingly digital and globalized world.

1. The Audiovisual Context of Portugal in 2023

1.1 Broadcast television in Portugal

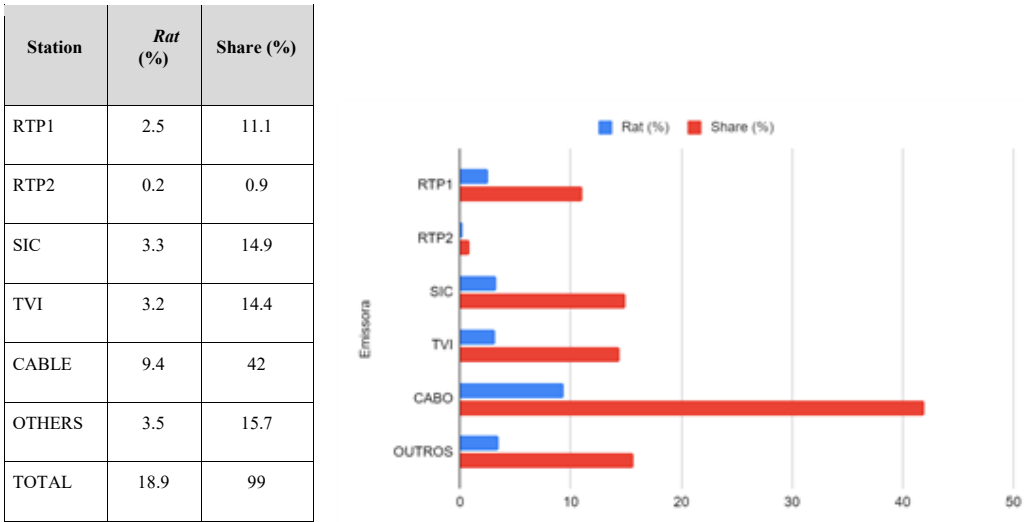
Table 1 National TV Networks/broadcast television channels in Portugal

Private networks/channels (2)	Public networks/channels (4+1)
SIC	RTP1
TVI	RTP2
	RTP3
	RTP Memória
	Canal Parlamento
Total networks = 3	
Total channels = 7	

Source: Obitel Portugal

The free-to-air offer has remained stable in recent years, with three stations since 1993 and a total of seven free-to-air channels since 2004. Despite discussions on the possibility of granting two new licenses for the launch of two private channels (one for news and another for sports), this has not yet materialized. The implementation process of the Digital Terrestrial Television (DTT) in Portugal was slow and late when compared to other European countries, falling short of its promised offerings to this day.

Graph 1 TV rating and share per station

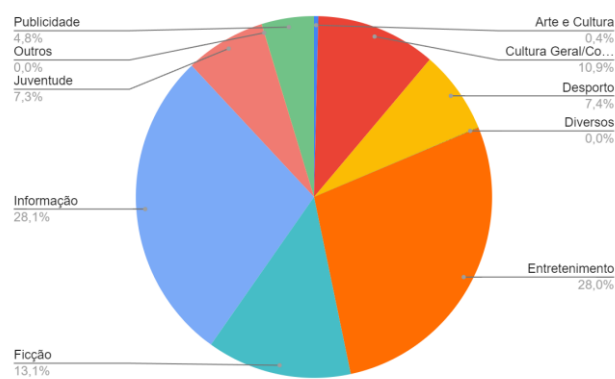


Source: Obitel Portugal/ Marktest MediaMonitor

In 2023, the public broadcaster’s first channel saw its audience ratings slightly increase on average. Meanwhile, the private channels experienced a decline when compared to 2022 (SIC dropped from a 3.7% rating to 3.3%, and TVI from 3.5% to 3.2%), with the gap between them narrowing. Paid channels, along with alternative forms of consumption, continued to rise steadily and consistently, showing the audience’s interest in a diverse range of options as well as the ability to consume content outside of pre-scheduled programming.

Graph 2: TV genres and broadcast programming hours - % (Open signal TV)

Genre	Hours	%
News	10522:09:44	28.1
Entertainment	10460:36:54	28.0
Fiction	4911:12:22	13.1
General interest/knowledge	4067:00:29	10.9
Sports	2785:35:27	7.4
Young audiences	2729:44:14	7.3
Advertisement	1778:42:22	4.8
Art and Culture	146:56:39	0.4
Other	08:29:14	0.0
Others	02:58:34	0.0
TOTAL	37407:26:02	100



Source: Obitel Portugal / Marktest MediaMonitor

The total number of hours of free-to-air television programming decreased by around 1,000 hours from 2022 to 2023. By genre, there was an increase in entertainment and fiction content, while, for example, the volume of news hours decreased. However, news content remains dominant when compared to other genres, thanks to the presence of three thematic 24-hour news channels in free-to-air broadcasting (RTP 3, SIC Notícias, and CNN), which act as extensions of news services, allowing for the development and in-depth exploration of topics and attracting audiences. Apart from this phenomenon, entertainment is the genre with the second-highest number of broadcast hours, only slightly less than news.

1.2. Paid TV and VoD Platforms in Portugal 2023

According to the annual report on Subscription Television Signal Distribution Services ² by Anacom (Autoridade Nacional de Telecomunicações), there was an increase in the number of subscription based television consumers, although this annual growth (2.1%) was the lowest since 2013.

² Anacom. Retrieved on May 30, 2023 https://www.anacom.pt/streaming/TVS_2023.pdf?contentId=1774395&field=ATTACHED_FILE

Regarding Pay-TV channels, an analysis presented by Dentsu/Carat for 0+M, among adults over 15 years old³, shows that these channels reached a market share of 42.1% (an increase of 2.1 percentage points when compared to the previous year). Among these channels, CMTV remained the leader (with a 1.5% increase in share when compared to 2022), followed by Hollywood channel with 2.5% share (an increase of 0.8% when compared to 2022), CNN Portugal with 2.2% share (a 0.9% decrease from 2022), Fox with 2.1% share (an increase of 0.2% from the previous year), and SIC Notícias with 2.0% share (a decrease of 0.3% when compared to 2022).

Table 2 Pay TV networks in Portugal

10 most watched Pay TV networks in Portugal			
TV Station	Genre	Source	Share (%)
CMTV	Generalist	Portugal	6.3
Hollywood	Fiction	Spain	2.5
CNN Portugal	News	USA	2.2
Fox	Fiction	USA	2.1
SIC Notícias	News	Portugal	2.0
TVI Reality	Entertainment	Portugal	1.7
Fox Movies Portugal	Fiction	USA	1.6
Globo	Generalist	Brazil	1.3
TVI Ficção	Fiction	Portugal	1.3
Fox Life	Fiction	USA	1.2

Source: Obitel Portugal

Table 2 shows TOP 10 for paid television in 2023, with none of them premièring national fiction this year. Comparatively to the 2022 TOP 10, there has been a slight shift in consumption preferences, with an increase in the consumption of fiction channels, and the channel TVI Ficção entering the TOP 10.

As for VoD platforms in Portugal, according to Martest’s BStream – Barómetro de Plataformas *Streaming*⁴, 49.7% of Portuguese people use streaming platforms (a 5.6% increase when compared to 2022), and 33.4% of the Portuguese population over 15 years old, residing in mainland Portugal, subscribes to at least one such service.

The same study indicates that Netflix remains the market leader in streaming, being subscribed by almost 77.6% of the respondents, followed by Disney+ with 56.5%, HBO Max (WarnerMedia) with 50.6%, Prime Video with 50.4%, and NOS Play with 47.1%.

³ Eco Sapo. Retrieved on May 30, 2023 <https://eco.sapo.pt/2024/01/03/sic-e-tvi-separadas-por-cinco-decimas-em-2023/>
⁴ “Netflix perdeu utilizadores e assinantes em Portugal desde o início do ano”. Retrieved on May 30, 2024 <https://www.publico.pt/2023/06/01/culturaipsilon/noticia/estudo-netflix-perdeu-utilizadores-assinantes-portugal-desde-inicio-ano-2051814>

RTP Play (associated with the public free-to-air television channel RTP) remains the only platform belonging to a national public organization that does not offer paid subscription services.

1.3. Sources of financing for the national audiovisual sector

In 2023, the landscape of advertising investment in the audiovisual sector maintained a strong focus on television, with a 22% growth when compared to the previous year. A remarkable 90.3% of total advertising investment was directed towards television, with the largest investors allocating 94.4% of their advertising budgets to this medium⁵. This traditional concentration demonstrates the continued confidence in generalist television's ability to reach a broad and diverse audience, thus solidifying it as a strong platform for long reaching advertising campaigns. Additionally, product placement and soft sponsoring continued to play a crucial role in fiction content, particularly as a way to expand advertising space within the content itself.

It's also noteworthy that streaming platforms have increased their investment in national fiction, partly to comply with regulations in this regard. This commitment has been reflected in the production of national content through co-productions with free-to-air channels, thus contributing to the diversification and strengthening of the audiovisual sector. Moreover, the presence of Portuguese productions on global platforms has increased the visibility of national content.

In terms of government support, the Instituto do Cinema e do Audiovisual (ICA) managed to increase the funding planned for 2023 by approximately 6.75 million Euro, reaching a total of 29.65 million Euro in support⁶. This significant increase was made possible thanks to additional funds raised from digital media taxes. With a more robust budget, the ICA was able to extend its support to a wider variety of projects, from feature films and documentaries to television series and multimedia works, thus contributing to a more dynamic and resilient audiovisual ecosystem.

On the other hand, the Tourism and Cinema Support Fund (FATC) was extended until 2026, with an initial allocation of 30 million Euro and annual increments of up to 14 million Euro. The success of this fund, which aims to attract international film and television productions, has been evident, as applications consistently exceed the planned allocations⁷.

At the European level, programs such as MEDIA (Creative Europe) and IBERMEDIA continued to foster cultural development by providing the usual financial support to various audiovisual projects. These programs have been essential for

⁵ Marktest. Retrieved on June 14, 2024: <https://www.marktest.com/wap/a/n/id~2a7c.aspx>

⁶ Plano estratégico 2024-2028 para o ica, i.p. e a sua ação no setor do cinema e do Audiovisual. Retrieved on June 14, 2024: https://ica-ip.pt/fotos/editor2/2024plano_estrategico_plurianual_ica.pdf

⁷ Retrieved on June 14, 1024: <https://observador.pt/2023/12/29/fundo-de-apoio-ao-turismo-e-ao-cinema-deixa-de-ter-teto-maximo-de-50-milhoes-de-euros/>. Retrieved on June 14, 1024: <https://observador.pt/2023/12/29/fundo-de-apoio-ao-turismo-e-ao-cinema-deixa-de-ter-teto-maximo-de-50-milhoes-de-euros/>

international cooperation and the growth of the creative industries in Europe, particularly in countries with smaller industries, as they benefit from specific funding for their development.

1.4. Communication Policies

In 2023, there was a consolidation of policies initiated in previous years aimed at strengthening the national industry.

As anticipated in 2022, the process of integrating the Portugal Film Commission (PFC) into the structure of the Instituto do Cinema e Audiovisual (ICA) was completed, with the PFC now operating under ICA's direct management. This move aimed to increase efficiency and transparency in the application procedures for the Tourism and Cinema Support Fund, boosting Portugal's competitiveness as a destination for international productions⁸.

Regarding streaming platforms, the implementation of a broadcast tax on advertising, not only on these platforms but also on online media such as YouTube, generated significant revenue in 2023. This helped align the tax revenues from online media more closely with those from traditional television, addressing the imbalance that existed in terms of advertising taxes⁹. Additionally, streaming platforms were required to give greater prominence to independent European productions spoken in Portuguese, a measure aimed at both protecting local culture and encouraging national independent production. This requirement not only increased the visibility of Portuguese productions but also encouraged streaming platforms to invest more in national content.

Finally, the Commission for the drafting of the white paper on public radio and television service, established at the end of 2022, presented its final report in May 2023. This detailed document analysed the evolution of the Portuguese audiovisual sector over recent decades, highlighting current challenges and proposing strategies for the future. Among the recommendations were the need to modernize RTP's technological and organizational infrastructure and to promote greater inclusion of innovative digital content to keep pace with new consumption habits¹⁰.

⁸ "Governo consolida Portugal Film Commission, abre duas fases de candidaturas em 2023 e garante continuidade do sistema até 2026". Retrieved on June 14, 2024: <https://www.portugal.gov.pt/pt/gc23/comunicacao/noticia?i=governo-consolida-portugal-film-comission-abre-duas-fases-de-candidaturas-em-2023-e-garante-continuidade-do-sistema-ate-2026>

⁹ "Taxas cobradas a sites como o YouTube renderam ao Estado 7,5 milhões em 2023". Retrieved on June 14, 2024: <https://www.publico.pt/2024/03/27/culturaipilon/noticia/taxas-cobradas-sites-youtube-renderam-estado-75-milhoes-2023-2084920>

¹⁰ *Livro Branco do serviço público de rádio e de televisão*. Retrieved on June 14, 2024: "<https://www.portugal.gov.pt/download-ficheiros/ficheiro.aspx?v=%3d%3dBQAAAB%2bLCAAAAAAABAAzNDY3MQYakFAjn-QUAAAA%3d>"

1.5. Digital and mobile connectivity infrastructure

The National Communications Authority (Anacom) publishes an annual comprehensive report on the evolution of the communications sector in Portugal, which includes digital connectivity, television consumption and electronic communications services on which audiovisual media rely. According to this report, in 2023, the number of subscription television subscribers reached 4.6 million, marking a 2.1% growth compared to the previous year, though this was the lowest rate of growth since 2013¹¹. Similarly, there was a slowdown in the adoption of fibre optic technology, which, despite a 7.2% growth over the previous year, represents the lowest growth rate since its implementation in 2007.

Regarding ISPs (Internet Service Providers), MEO continued to lead the market, holding a 41.5% share in 2023, a slight increase of 0.5% when compared to the previous year. NOS maintained the second position with 36.4% of subscription television subscribers, although it lost 0.7%. Vodafone followed with 19.2% of subscribers, registering a growth of 0.4%. NOWO saw its market share decrease to 2.7%, a drop of 0.2% from the previous year. Subscription television services continued to dominate the market, with 88% of households using this type of service. Meanwhile, the number of households with exclusive access to Digital Terrestrial Television (DTT) continued to decline, standing at 8% in 2023.

In terms of mobile connectivity, LTE (Long Term Evolution) coverage in Portugal reached over 99% of the population, with the main operators (MEO, NOS, and Vodafone) ensuring widespread mobile broadband service coverage.

¹¹ “O Sector das Comunicações em 2023”. Retrieved on June 14, 2024: https://anacom.pt/streaming/SectorDas-Comunicacoes2023.pdf?contentId=1778182&field=ATTACHED_FILE

2. Analysis of the Year: National and Iberian-American Premièring Fiction on broadcast television

CHART 1. National and Iberian-American fiction premièring in 2023 (national and foreign under the scope of Obitel and co-productions)

PREMIERING NATIONAL TITLES– 40	PREMIERE IMPORTED TITLES – 6
RTP1 – 19 <i>A Hora da Liberdade (telefilm)</i> <i>Abandonados (series)</i> <i>Ao Largo (series)</i> <i>Braga (series)</i> <i>Cavalos de Corrida (series)</i> <i>Conta-me como Foi (series)</i> <i>Curral de Moinas - Os Banqueiros do Povo (series)</i> <i>Emília (series)</i> <i>Glória (series)</i> <i>Há-de haver uma lei (telefilm)</i> <i>Histórias da Montanha (miniseries)</i> <i>Jogos de engano (telefilm)</i> <i>Km224: a série (series)</i> <i>Lusitania (miniseries)</i> <i>O Crime do Padre Amaro (miniseries)</i> <i>O Natal do Bruno Aleixo (tminiseries)</i> <i>O Pio dos Mochos (telefilm)</i> <i>Salgueiro Maia - O Implicado (miniseries)</i> <i>Serpentina (telefilm)</i> RTP2 – 1 <i>Regresso a Itaca (series)</i> SIC – 10 <i>A Casa de Aurora (sitcom)</i> <i>Flor sem tempo (telenovela)</i> <i>Lucia - A guardiã do segredo (miniseries)</i> <i>Marco Paulo: a história da minha vida (miniseries)</i> <i>O Clube (series)</i> <i>Os Eleitos (series)</i> <i>Papel Principal (telenovela)</i> <i>Patrões Fora (sitcom)</i> <i>Por Ti (telenovela)</i> <i>Sangue Oculto (telenovela)</i> TVI – 10 <i>Festa é Festa V (telenovela)</i> <i>Festa é Festa VI(telenovela)</i> <i>Festa é Festa VII - Verão (telenovela)</i> <i>Festa é Festa VIII(telenovela)</i> <i>Jacinta (telefilm)</i> <i>Morangos com Açúcar (series)</i> <i>Para Sempre (telenovela)</i> <i>Pecado (mini-series)</i> <i>Queridos Papás (telenovela)</i> <i>Quero é Viver (telenovela)</i>	SIC – 6 <i>Amor Eterno Amor (telenovela)</i> <i>Dona Flor e seus dois maridos (telenovela)</i> <i>Flor do Caribe (telenovela)</i> <i>Pantanal (telenovela)</i> <i>Travessia (telenovela)</i> <i>Um lugar ao Sol (telenovela)</i> TOTAL ORIGINAL OBITEL TITLES: 46

Source: Obitel Portugal / Marktest MediaMonitor

After a slight decline in the number of fiction titles from 2021 to 2022 (two fewer titles), 2023 saw an increase of around 39% when compared to the previous year. The diversification of formats that has characterized television fiction offerings in recent years was notable in 2023, including from private channels. SIC cross launched titles in OPTO, its own streaming platform, while TVI capitalized on the success of the telenovela *Festa é Festa* by artificially splitting it into additional seasons. As for imported titles, following the trend of the past decade, they remain largely confined to Brazilian telenovelas produced by Globo, broadcast by SIC during the early evening and late-night slots (from 11 p.m. or midnight onwards).

CHART 2. National fiction titles premiering in 2023
and their evolution over five years

Format	Titles						Hours					
	2019	2020	2021	2022	2023	Total	2019	2020	2021	2022	2023	Total
Telenovela	10	6	10	13	11	50	878:00	709:05	801:05	824:30	847:25	4060:05
Series	8	6	10	13	13	50	145:00	68:25	144:05	62:20	73:25	493:15
Mini-series	1	3	3	1	8	16	02:15:00	08:10:00	12:15:00	01:20:00	29:10	53:10
Sitcom	0	1	6	0	2	9	0:00	0:00	0:00	0:00	33:05	33:05
One-shot	0	0	0	0	0	0	0:00	01:00:00	04:00:00	0:00	0:00	05:00:00
Docudrama	0	0	0	0	0	0	0:00	0:00	0:00	0:00	0:00	0:00
Other	2	3	13	6	6	30	03:20:00	07:05:00	36:10	23:05:00	05:25:00	75:05
Total	21	19	42	33	40	155	1028:35	793:45	997:35	911:15	988:30	4719:40

Source: Obitel Portugal / Marktest MediaMonitor

Although telenovelas continue to dominate prime-time programming on free-to-air television, the past five years have shown a trend toward diversifying content, with series matching telenovelas in number (50 titles), telefilms (categorized as “other”) maintaining a steady and significant presence on screens, and miniseries gaining traction. As identified in recent annual reports, the Public Media Service has been instrumental in revitalizing the market by investing in independent national productions and short-form serial stories across multiple genres, actively contributing to the growth of the audiovisual sector and cultivating new audiences. Private channels, while having less room for experimentation, have also been testing different formats, typically on weekends or one day a week, breaking the standard two-to-three-telenovela lineup. SIC, which owns the paid streaming platform OPTO, has leveraged its premium catalogue by premiering shows on free-to-air TV, while TVI, in addition to offering two miniseries throughout the year, revived its iconic show *Morangos com Açúcar*, which was a huge hit between 2003 and 2012, in partnership with Amazon Prime Video. Despite this more diverse offering, the nearly 5,000 hours of fiction broadcast over the past five years are largely attributed to telenovelas, which are programmed daily during prime time. Each telenovela often consists of more than 400 episodes, with a runtime between 45 and 60 minutes per episode.

CHART 3. Fiction premièring in 2023: Countries of Origin

Country	Titles	%	Hours	%
NATIONAL (total)	40	87	988:20	78
OBITEL COUNTRIES (total)	6	13	285:15	22
Argentina	0	0	0:00	0
Brazil	6	13	0:00	0
Chile	0	0	0:00	0
Colombia	0	0	0:00	0
Ecuador	0	0	0:00	0
Spain	0	0	0:00	0
USA Hispanic	0	0	0:00	0
Mexico	0	0	0:00	0
Peru	0	0	0:00	0
Portugal	40	87	988:20	78
Uruguay	0	0	0:00	0
Venezuela	0	0	0:00	0
CO-PRODUCTIONS (Total)	0	0	0:00	0
National Co-productions	0	0	0:00	0
Co-productions on Obitel Countries	0	0	0:00	0
TOTAL	46	100	1273:30	100

Source: Obitel Portugal / Marktest MediaMonitor

As previously noted, in 2023, the total number of national titles increased significantly compared to 2022. However, the production under the Obitel scope remained stable, both in terms of the number of titles and their origin (primarily Brazil, from TV Globo). Ibero-American fiction has almost disappeared from Portuguese screens since 2000, when private channels shifted their focus to continuous domestic production for prime-time slots. The only remaining exception has been Brazilian telenovelas, which continue to air on SIC, a channel that has maintained an agreement with Globo since its inception in 1992.

CHART 4. National and Iberian-American fiction formats aired in 2023

Format	Titles				Hours			
	National	%	Rest of Obitel	%	National	%	Rest of Obitel	%
Telenovela	11	27.5	6	100.0	847:25	85.7	11:00:00	9.5
Series	13	32.5	0	0.0	73:25	7.4	12:00:00	10.3
Mini-series	8	20.0	0	0.0	29:10	3.0	13:00:00	11.2
Sitcom	2	5.0	0	0.0	33:05	3.3	15:00:00	12.9
One-shot	0	0.0	0	0.0	0:00	0.0	16:00:00	13.8
Docudrama	0	0.0	0	0.0	0:00	0.0	17:00:00	14.7
Other	6	15.0	0	0.0	05:25:00	0.5	32:00	27.6
Total	40	100.0	6	100.0	988:30	100.0	116:00	100.0

Source: Obitel Portugal / Marktest MediaMonitor

As identified above, the number of titles in formats other than telenovelas has been growing. In 2023, series even surpassed long-running serials, thus becoming the most offered type of fiction by free-to-air channels. Miniseries (ranging from 2 to 6 episodes) and telefilms also saw significant growth, overall exceeding the number of titles in these categories when compared to the previous year.

CHART 5: 10 Most watched titles in 2023

Title		TV Station	Producer (Country)	Format/Genre	Nº ch.ep.	Time Slot	Rating	Share
1	<i>Festa é Festa</i>	TVI	Plural Entertainment (PT)	Series/Comedy	329	<i>Primetime</i>	9.8	20.7
2	<i>Marco Paulo: A história da minha vida</i>	SIC	Coral Europa (PT)	Miniseries /biopic	3	<i>Primetime</i>	8	17.2
3	<i>Amor , Eterno Amor</i>	SIC	TV Globo (BR)	Telenovela/Drama	14	<i>Acess</i>	7.7	17.7
4	<i>Sangue Oculto</i>	SIC	SP Televisão (PT)	Telenovela/Drama	208	<i>Primetime</i>	7.7	17.5
5	<i>Quero Viver</i>	TVI	Plural Entertainment (CL)	Telenovela/Drama	57	<i>Primetime</i>	6.9	17.9
6	<i>Morangos com Açúcar</i>	TVI	Casa da Criação (PT)	Series / YA	10	<i>Primetime</i>	6.8	14.4
7	<i>Queridos Papás</i>	TVI	Plural Entertainment (AR)	Telenovela/Comedy	220	<i>Primetime</i>	6.2	16.6
8	<i>Flor Sem Tempo</i>	SIC	SP Televisão (PT)	Telenovela/Drama	239	<i>Late Night</i>	5.5	17.4
9	<i>Papel Principal</i>	SIC	SP Televisão (PT)	Telenovela/Comedy	67	<i>Primetime</i>	5.4	13.1
10	<i>Curral de Moinas: Os Banqueiros do Povo</i>	RTP	Miguel Cadilhe (PT)	Miniseries/Comedy	10	<i>Primetime</i>	5.4	11.3
Total National Productions: 9				Foreign Original Scripts: 3				
90%				30%				

Source: Obitel Portugal / Marktest MediaMonitor

CHART 5a: 10 most watched national titles

Title		TV Station	Producer (Country)	Format/Genre	N° ch.ep.	Time Slot	Rating	Share
1	<i>Festa é Festa</i>	TVI	Plural Entertainment (PT)	Series/Comedy	329	<i>Primetime</i>	9.8	20.7
2	<i>Marco Paulo: A história da minha vida</i>	SIC	Coral Europa (PT)	Miniseries/Melodrama	3	<i>Primetime</i>	8	17.2
3	<i>Sangue Oculto</i>	SIC	SP Televisão (PT)	Telenovela/Drama	208	<i>Primetime</i>	7.7	17.5
4	<i>Quero Viver</i>	TVI	Plural Entertainment (CL)	Telenovela/Drama	57	<i>Primetime</i>	6.9	17.9
5	<i>Morangos com Açúcar</i>	TVI	Casa da Criação (PT)	Series / YA	10	<i>Primetime</i>	6.8	14.4
6	<i>Queridos Papás</i>	TVI	Plural Entertainment (AR)	Telenovela/Comedy	220	<i>Primetime</i>	6.2	16.6
7	<i>Flor Sem Tempo</i>	SIC	SP Televisão (PT)	Telenovela/Drama	239	<i>Late night</i>	5.5	17.4
8	<i>Papel Principal</i>	SIC	SP Televisão (PT)	Telenovela/Comedy	67	<i>Primetime</i>	5.4	13.1
9	<i>Curral de Moinas: Os Banqueiros do Povo</i>	RTP	Miguel Cadilhe (PT)	Miniseries/Comedy	10	<i>Primetime</i>	5.4	11.3
10	<i>A Casa da Aurora</i>	SIC	SP Televisão (PT)	Sitcom/Comedy	6	<i>Primetime</i>	4.7	11.3
				Foreign Original Scripts: 2				
				20%				

Source: Obitel Portugal / Marktest MediaMonitor

Contrary to previous years, in 2023, a Brazilian production, *Amor, Eterno Amor*, reached third place in the top ten most-watched shows in Portugal. Regarding original scripts, 70% are of national origin, as shown in Table 5, with three being of international origin: *Amor, Eterno Amor* (Brazil, SIC), *Quero Viver* (Chile, TVI), and *Queridos Papás* (Argentina, TVI). TVI was the channel that relied most on adaptations of original scripts, with two titles.

In 2023, SIC had the highest number of entries in both charts, leading the rankings with five (5) titles, two (2) of which were among the most-watched by Portuguese audiences last year. TVI remains the only other channel to appear in both tables, with four (4) fiction products, thus reversing the trend of previous years when it dominated the top of the most-watched national content.

The series/telenovela *Festa é Festa*, split into seasons VI, VII - Summer and VIII, continued to captivate Portuguese audiences in 2023, occupying the top four spots in the overall ranking. Therefore, its total viewership overall was considered in the analysis of Tables 5 and 5a. It's noteworthy that, although the trend of favouring national fiction remained, foreign titles - particularly Brazilian productions - had a greater presence in the previous year. In contrast to data from other years, the Portuguese public broadcaster RTP managed to enter the top ten with the film-turned-series *Curral de Moinas: Os Banqueiros do Povo*.

In 2023, audience preferences were evenly split between series (four titles) and telenovelas (six titles), with a similar division between comedy and drama. The trend towards lighter, more relaxed content, which began in 2021, continued into 2023.

**CHART 6: Audience profile of the 10 most viewed titles:
gender, age, socioeconomic segment**

Title		TV Station	Sex %		GSE%			
			Women	Men	AB	C	D	E
1	<i>Festa é Festa</i>	TVI	62.00	38.0	11	16.5	38.8	33.7
2	<i>Marco Paulo: a história da minha vida</i>	SIC	56.7	43.3	14.4	19.9	34.6	31.1
3	<i>Sangue Oculto</i>	SIC	60.5	39.5	14.6	16.8	40.8	27.8
4	<i>Quero é Viver</i>	TVI	66.0	34.0	10.3	18.4	38	33.2
5	<i>Morangos com Açúcar</i>	TVI	61.5	38.5	9.8	18.4	42.6	29.3
6	<i>Queridos Papás</i>	TVI	63.9	36.1	10.8	16.6	40.2	32.4
7	<i>Flor Sem Tempo</i>	SIC	62.2	37.8	16.4	18.6	37.6	27.5
8	<i>Papel Principal</i>	SIC	61.8	38.2	13.9	17.1	39.6	29.3
9	<i>Curral de Moinas: Os Banqueiros do Povo</i>	RTP	52.8	47.2	19.3	17.7	31.1	31.9
10	<i>A Casa da Aurora</i>	SIC	63.7	36.3	10.9	17.9	36.2	35.0

Source: Obitel Portugal / Marktest MediaMonitor

Title		TV Station	Age %						
			04-14	15-24	25-34	35-44	45-54	55-64	65+
1	<i>Festa é Festa</i>	TVI	3.1	6.1	6.2	8.5	13.7	19.7	21.4
2	<i>Marco Paulo: a história da minha vida</i>	SIC	3.6	4.9	4.8	10.7	16.2	25.7	18.0
3	<i>Sangue Oculto</i>	SIC	4.0	7.3	5.8	10.3	16.2	20.9	21.6
4	<i>Quero é Viver</i>	TVI	3.3	5.7	6.7	8.0	15.3	22.6	18.9
5	<i>Morangos com Açúcar</i>	TVI	3.7	7.0	8.1	9.4	12.2	21.9	19.9
6	<i>Queridos Papás</i>	TVI	3.3	3.8	6.0	7.5	13.4	25.1	21.9
7	<i>Flor Sem Tempo</i>	SIC	3.0	5.7	5.3	10.8	16.2	22.1	22.9
8	<i>Papel Principal</i>	SIC	2.3	5.6	6.7	9.7	16.3	20.8	20.8
9	<i>Curral de Moinas: Os Banqueiros do Povo</i>	RTP	3.0	4.7	4.4	8.7	12.3	16.2	20.7
10	<i>A Casa da Aurora</i>	SIC	2.4	3.1	8.4	8.4	11.7	21.9	17.9

Source: Obitel Portugal / Marktest MediaMonitor

When analyzing the Audience Profile for 2023, it remains clear, as in previous years, that women are the primary consumers of telenovelas and series. However, the gender gap was significantly narrowed with *Marco Paulo: A História da Minha Vida* and *Curral de Moinas: Os Banqueiros do Povo*, two miniseries that were particularly well-received by male audiences. This trend may be attributed to the themes and the short duration of these miniseries, which likely appealed more to men.

In terms of socioeconomic segments, the D and E brackets are the most avid viewers of telenovelas during the prime time slot, with little variation between the top ten channels. In 2023 the miniseries *Curral de Moinas: Os Banqueiros do Povo* managed to attract a significant portion of viewers from brackets A and B (19,3%).

With respect to age groups, based on Chart 6, one can infer that viewers over 65 are the most engaged with fiction formats. Meanwhile, younger audiences were captured by *Morangos com Açúcar* (TVI), which resonated with those aged 0 to 14, and *Sangue Oculto* (SIC), which drew viewers in the 15 to 24 age group.

3. VoD Monitoring in 2023

3.1 VoD platform market in 2023

According to the BStream study – Streaming Platforms Barometer by Marktest¹², although Netflix remains the market leader for streaming services in Portugal, the

¹² Público. Retrieved on May 30, 2024 <https://www.publico.pt/2023/06/01/culturaipsilon/noticia/estudo-netflix-perdeu-utilizadores-assinantes-portugal-desde-inicio-ano-2051814>

platform experienced a 13% drop in the number of subscribers in Portugal during the first semester of 2023. While it recovered some subscribers in the following semester, it shows a 4.4% decline when compared to 2022. Still, the Top 5 for streaming platforms remains the same from the two previous years, with Netflix leading, followed by Disney+, HBO Max (WarnerMedia), Prime Video and NOS Play.

Regarding access to these platforms via telecom operators, Netflix can be accessed on corresponding channels in Vodafone and MEO, while for NOS it is necessary to download an app on the set-top box or Smart TV. Disney+ is independent of any telecommunications contract, requiring only the app to access its content. HBO Max (WarnerMedia) is available to Vodafone customers (with some operator packages including the service) and via the platform's app available on set-top boxes or Smart TVs. Prime Video can be accessed directly on MEO, Vodafone and NOS, while NOS Play is only available through NOS.

3.2. Local VoD platform offering in 2023 (national, regional within the country)

In 2023, nine (9) national streaming services were identified in Portugal: RTP Play, OPTO, TVI Player, NOS Play, FilmIn, Spamflix, Q Play, GinásticaTV, and Panda+. The first eight services were presented in OBITEL's 2021 and 2022 yearbooks.

Panda+ is a platform associated with the Panda channel, which became exclusively Portuguese in December 2022 following the channel's shutdown in Spain. It is aimed at children between the ages of 6 and 12, offering a catalog of animated series and educational entertainment programs (also available on the paid channels Panda and Panda Kids). Throughout 2023, the platform was freely accessible.

3.3 VoD Analysis in 2023: Premiering national fiction and co-productions

As shown in Chart 7, there was a decrease in the offering of national titles, with only nine premiering Portuguese titles, and just one being a co-production.

Chart 7. National and Ibero-American fictions in 2023 on VoD systems

PREMIERING NATIONAL TITLES	CO-PRODUCTIONS
RTP Play – 1 1. <i>De tanto fingir encontrei-me</i> (series) Opto – 5 1. <i>Praxx</i> (series) 2. <i>Projecto Delta</i> (series) 3. <i>Lúcia, a guardiã do segredo</i> (miniseries) 4. <i>O Clube</i> (series) 5. <i>Os Eleitos</i> (series) Netflix – 1 1. <i>Rabo de Peixe</i> (series) Prime Video – 1 1. <i>Morangos com Açúcar</i> (series)	Prime Video – 1 1. <i>Operação Maré Negra</i> (series – Spain, Portugal) Globoplay – 1 1. <i>Codex 632</i> (series – Portugal, Brasil)
Total: 8	Total: 2

Source: Obitel Portugal

3.4. Narrative characteristics on VoD in 2023

In 2023, eight national fiction series premièred (one less than the previous year) across four VoD platforms: OPTO launched five series, while RTP Play, Netflix, and Prime Video released one series each. These series were exclusively aired on their respective platforms, except for *Morangos com Açúcar*, which was also broadcast on TVI, and *Lúcia, a Guardiã do Segredo*, which was later aired on SIC. Two co-productions are noteworthy, one on Amazon Prime Video (*Operação Maré Negra*) and another that, even though it premièred on the public service channel, was made available on the Globoplay streaming platform a few days later with the first three episodes released at once.

De tanto fingir encontrei-me premièred in July on RTP Play, a six-episode series of 20 minutes each, produced as part of the RTPLab program. Directed at a young audience, it follows the lives of six young actors, portraying both their everyday lives and the dramatization of personal issues. The series explores themes such

as domestic violence, identity, discrimination, life choices, procrastination, and the cost of fame. It had only one season and, to date, no plans for continuation have been announced.

The OPTO series stand out for offering narratives of various genres, primarily targeting a younger audience. In January 2023, OPTO premiered the second season of *Praxx*, with six episodes released weekly. As mentioned in last year's yearbook, this series inspired by real events and follows a young woman seeking to uncover the truth behind her sister's death, which occurred in an alleged accident on a beach with other university students. This series is a young adult drama with two distinct timelines that intertwine on each episode. Its main theme focuses on university hazing practices.

Projecto Delta premiered on OPTO in March, with eight weekly episodes (each 45 minutes long). A sci-fi, mystery, and fantasy series, it tells the story of a teenage girl investigating her father's apparent suicide attempt while realizing her dreams intersect with reality, offering clues to solve the mystery that is tormenting her.

Lúcia, a Guardiã do Segredo is a three-episode miniseries that launched on OPTO on May 13, 2023, the day the Catholic community celebrates the first apparition of Our Lady of Fatima in 1917 to the three shepherd children. The miniseries is based on the story of Lúcia dos Santos, one of the "shepherds" who claimed having received multiple apparitions of the Virgin Mary. The episodes, around 45 minutes each, were released throughout May on the streaming platform.

Between September and October 2023, OPTO aired the fourth season of *O Clube*, a six-episode crime and mystery series of around 45 minutes per episode focusing on the lives of employees at a famous nightclub. This season's plot follows a police investigation involving a club customer and its consequences for the business. The series aimed at an adult audience blends crime and mystery with sex, politics and business.

Os Eleitos was the last Portuguese series to premiere on OPTO, in December 2023. The first season has 26 episodes of around 45 minutes each. It is a youth drama interwoven with mystery and crime, targeted at a young adult audience. Set in a high-performance sports centre, the series portrays the dreams of a group of young athletes striving to become the best in the world. It addresses themes such as racism, xenophobia, eating disorders, violence in relationships and marriage, gender dysphoria, and more.

Netflix released the series *Rabo de Peixe* in October 2023, its second Portuguese production. This thriller is based on real events and tells the story of a young fisherman and his group of friends who find a large amount of cocaine off the coast of Rabo de Peixe, a village in São Miguel, Azores. Their discovery draws them into a dangerous chase both by drug lord who wants it back and the police who are trying to seize it. The seven-episode series of about 45 minutes each made it to the global Top 10 of Netflix in 33 countries during its first week of release.

The last national series to première on a VoD platform was *Morangos com Açúcar*, also in October 2023. This youth drama with elements of comedy and mystery is a reboot of the original telenovela that aired on TVI from 2003 to 2012. The first season has 10 episodes of 45 minutes each and is set at the same school as the original series, now focusing on the personal and family conflicts of a new group of students. Themes such as homosexuality, polyamory, fatphobia, and the impact of social media on adolescence are explored.

4. Interactivity and Audience Participation

Regarding strategies for greater audience engagement and interactivity, what was observed in 2023 was an apparent focus on the basic offering, without much room for experimentation or innovation. The channels' efforts remained on securing anchor content (main shows at specific times) to solidify their programming schedules, without any entirely interactive products or initiatives that fostered more creative audience participation beyond promoting engagement on social media. In this area of production, we could even say there was a regression, as some transmedia attempts seen in previous years were not replicated in new productions this year.

4.1 Social Interactivity

A notable exception is SIC's transmedia strategy with the creation of a series born from the telenovela *O Papel Principal*. *Os Eleitos*, a spin-off, was released on the OPTO streaming platform on December 29, 2023. This youth series revives the storyline of the character from the original telenovela who becomes famous. In other words, *Os Eleitos* is somewhat of a russian doll of stories and characters that cross over from the *O Papel Principal* universe. This was SIC's way of capitalizing on resources allocated to the telenovela, addressing audience results, and enhancing the characters that resonated most with the public. Additionally, the sitcom *A Casa de Aurora*, a spin-off exploring the comedic core of the same telenovela, was aired on linear TV. However, the strategy fell short of expectations, as the audience was not very engaged, likely feeling lost.

The series *Morangos com Açúcar*, targeted at a younger audience, had some initiatives to enhance audience interactivity and increase fans' interest beyond real-time viewing. In October 2023, TVI launched the "Clube Morangos com Açúcar" platform, a digital experience where, for a monthly subscription (€2.99), fans could access exclusive content, perks, and follow a spin-off of the main series' protagonists' lives. With *#NaWeb*, Lucas Dutra created several short films based on the series' characters, and *Milkshake* became the section of the club where subscribers could access behind-the-scenes footage and live interactions with the cast.

4.2 Social Participation

Continuing a trend from previous years, social participation tied to national fiction titles remained confined to traditional internet spaces—clips of episodes on YouTube, video snippets of major scenes, and photos on Instagram, as well as videos on TikTok—following the conventional engagement metrics (likes, shares, and followers).

Just as with interactivity, there was very little investment by either the production side (channels) or the audience in creating complementary narratives (through memes, blogs, profiles, and other content mixes) to participate more actively with their favourite fiction products.

5. Highlight of the Year

Rabo de Peixe was Netflix's second original production in Portugal. For the first time, the streaming platform released a global report with some general audience data for the first half of 2023, revealing that the Portuguese series garnered 31.5 million hours of streaming by June of that year. Directed by the Azores-born advertising filmmaker Augusto Fraga, the project won the platform's content competition with a real-life story that had a devastating impact on the island of São Miguel. The Azores archipelago is located in the middle of the Atlantic Ocean, halfway between Europe and America, making it a stopover for all kinds of sea routes. In 2001, a storm forced a yacht to drop half a ton of cocaine, which washed ashore, forever changing the lives of the fishing community of Rabo de Peixe, one of the poorest in the region and all of Europe.

The impact can still be felt in the community to this day, having yet to recover from the consequences of what this extraordinary event brought on over 20 years ago. The series departs from a dramatic approach and instead revolves around a group of young people with few life prospects who see the situation as an opportunity to change their lives. However, what begins as an opportunity soon turns into a nightmare. The series was an international success, quickly becoming one of the most successful non-English-language series. Netflix has confirmed two more seasons, though the release date is yet to be announced.

The series fits into a global trend of serialized content offerings based on true stories and crime thriller genres, appealing to a diverse audience. Its puzzle-like structure and enigmatic approach capture the attention of viewers seeking focused entertainment, with the podcast segment also expanding.

Still in the realm of streaming, the year also saw the rise of FAST (Free Ad-Supported Streaming Television). The nature of linear television joined forces with the convenience of on-demand streaming, allowing audiences to have a lean-back

experience, which had been nearly overtaken by the proliferation of streaming platforms and their à la carte functionalities. In recent years, however, there has been growing audience fatigue with SVoD experiences due to issues such as the need to juggle multiple subscriptions, binge searching (inconsequential content searching) or constant content migration between platforms.

In March 2023, OPTO SIC launched Portugal's first FAST channel—SIC Novelas—and by 2024, it had opened two more channels (SIC Alta Definição and SIC Replay). These channels capitalize on already monetized stock content without the need for significant marketing expenses. TVI also embraced this global trend, launching a dedicated channel for the hit series *Morangos com Açúcar* on TVI Player (its own streaming platform, still lacking a robust offering of original content). This helped the series be relaunched with a renewed aesthetic and thematic approach in line with international youth content offerings.

6. Topic of the Year: “What is happening with narratives in Ibero-American television fiction?”

In a static audiovisual market such as in Portugal, finding new trends that break the pattern set by a market dominated by three major broadcasters is challenging, especially as international platforms have been slow to define an active strategy for national production. Portuguese producers currently face the issue of finding relevance and competitiveness in a globalized market that remains heavily Anglo-Saxon, though Spanish-language fiction has gained prominence. According to data made public by C21, “in the fourth quarter of 2020, the percentage of fiction orders worldwide was 67% for linear channels and 31% for VOD services, while in the fourth quarter of 2023, it was 77% and 23%, respectively.” The public perception may perhaps be the opposite, but traditional players remain fundamental to the survival of the audiovisual industry, especially outside the hegemonic USA-UK axis.

The arrival of Netflix in Portugal in 2015, followed by other international platforms, sparked anticipation about the development of the national audiovisual industry and the potential for internationalizing European productions in Portuguese. The transposition of the European directive into national legislation was a point of tension that revealed persistent fractures in the cultural and creative industries, particularly between producers focused on film and those producing television content. The former fought to ensure that financial contributions would exclusively increase funding for the Portuguese Film and Audiovisual Institute (ICA), which would then decide, via public calls, which culturally relevant projects to support and, consequently, produce. However, the television industry seemed to favour broadcasters and platforms investing directly in audience-relevant projects, revealing a clear opposition between statist and market strategies.

The ICA was expected to reach 30% financing for audiovisual works by 2018, but it remains below that obligation (28.8%), with a clear favouritism towards the cinema industry, which is still heavily reliant on this financing model and, consequently, fights against any increase of funding towards the audiovisual sector. As a result, the objective set in 2014 was transferred to the 2024-2028 Strategic Plan. However, it is worth highlighting the efforts seen in 2023: a 16.7% increase in funding for the writing and development of audiovisual works, in relation to the call where production companies with multiple projects apply, and an 8.7% increase in funding for individual works, where authors apply on their own. This increase is due to the fact that the Institute's budget was reinforced after the implementation of the AVMSD (Audiovisual Media Service Directive).

The fees paid by platforms in 2023 amounted to 7.7 million euros and an investment in national audiovisual production of around 8 million euros is expected, with this amount serving more for the acquisition of national series and films than for original production. As mentioned in the latest Audiovisual Production Sector Yearbook in Portugal, "since 2022, the number of national productions on platforms has been growing, with particular emphasis on HBO Max (over 40 titles), followed by Amazon Prime Video (around 20 titles), and finally, Netflix (more than a dozen titles)."¹³

Although the investment from the public broadcaster in series is increasing, when looking at the volume of fiction hours, national production remains focused on telenovelas, a format seen as lesser or culturally irrelevant which, in turn, receives no support, in contrast to markets that have become significant or even hegemonic, such as Turkey. Telenovelas dominate the prime time of private broadcasters and, despite the evident erosion of audiences, they remain the anchor product for that time slot. SIC and TVI collectively broadcast about 1200 hours of Portuguese soap operas per year, in contrast with the strategies of other European countries. As mentioned above, the public broadcaster RTP, in a strategy to balance the ecosystem, has been dedicated to broadcasting national series by premiering 14 new titles in the year under review, with a wide variety of genres and themes, but the number of episodes per season has been shortened, clearly influenced by platform strategies. Influence, however, works both ways. Recently, in the case of Portugal, fiction produced for generalist television, often declared obsolete, has found new audiences through Video On Demand (VOD) and Subscription Video on Demand (SVOD) services.

If we focus on the new landscape for series, when assessing the last 9 years, RTP financed and broadcast 81 titles, while platforms Max, Apple, Skyshowtime, Prime Video, and Netflix only distributed and financed two national originals, both from Reed Hastings' platform. Based on this, and with no expected change in the near future, producers' strategies will likely focus on creating co-productions that integrate

¹³ Own translation. Retrieved on <https://www.apitv.com/wp-content/uploads/2024/05/240506-ANU-ARIO-UCP-23-DIGITAL.pdf>

funding from broadcasters, platforms, distributors, and sector support funds, such as PIC Portugal¹⁴. This approach allows for risk-sharing among the different parties but leads to audience fragmentation across multiple exhibition outlets, making it less attractive to players, despite the low investment from each one. There is one other downside to this model: the time it takes from the creative development of the series to its realization, risking the content becoming diluted due to the many, sometimes contradictory, visions that need to be accommodated within a single series.

Considering all the previously discussed issues, it is safe to say that the strategies for streaming platforms are increasingly focused on acquiring national content that has already been aired by local broadcasters, finding new, younger audiences through non-linear viewing who are disconnected from traditional players' programming. The comedy *Pôr do Sol* (2021-2022) is a good example of this strategy. Its broadcast on RTP 1 had an average audience of 350,000 viewers but, as José Frago, Director of Programming at the public broadcaster, noted, "the results spike in non-linear viewings." After its free-to-air run, the series debuted on Netflix and immediately appeared in the platform's Top 10 in Portugal. "If we stick to the live airing, the results are modest, but they don't reflect the feedback we received. The last episode will be shown in cinemas, and we sold out," said producer and director Manuel Pureza¹⁵. The show's success with younger audiences led the fictional band from this comedy, Os Jesus Quisto, to perform in several venues nationwide, culminating in a performance at the NOS Alive festival in 2023, on the same day that Sam Smith headlined. Also in 2023, the feature film *Pôr do Sol, o Colar de São Cajó*, based on the series' characters, premiered and became the most-watched national film in theaters, with 118,671 viewers.¹⁶

This strategy of multi-outlet exhibition increases the longevity of series, allowing them to reach a broader audience, but this reality does not result in any significant increase in budgets for fiction, which remain very modest. In contrast to Spain, for example, these budgets have been decreasing year by year, with the average cost per episode now lower than it was fifteen years ago and, when accounting for inflation, it shows a sector struggling to survive. These problems could be mitigated by sharing rights with producers, but the fact that it is such a limited market allows for a dominant position, with all participants, even creators, being forced to give up the rights to their works and receiving no revenue from sales. Despite all the talk of a new golden age of audiovisual, peripheral markets continue to suffer from underinvestment and inequality in rights and, without a national strategy for the sector, the development of a strong and competitive audiovisual industry is at risk.

¹⁴ The reason for choosing 2015 pertains to the fact that it was in this year that Netflix became available in Portugal.

¹⁵ Statement to Agência Lusa 1.09.2022. Own translation.

¹⁶ Data by the Instituto de Cinema e Audiovisual https://ica-ip.pt/fotos/downloads/ranking_dos_filmes_nacionais_mais_vistos_2004_2024_197136659a5fed5199.pdf,

Works Cited

- Anacom – Autoridade Nacional de Telecomunicações: <https://anacom.pt/>
- Burnay, Catarina Duff (2024). *Anuário do Sector de Produção Audiovisual*. Lisboa: CECC/APIT
- Marktest: <https://www.marktest.com/wap/>
- ICA – Instituto do Cinema e do Audiovisual: <https://www.ica-ip.pt/pt/>
- Lopes, Felisbela, Burnay, Catarina Duff, Almeida Santos, Clara, *et al* (2023). *Livro Branco do serviço público de Media*. Lisboa: Ministério da Cultura.
- Schneeberger, Agnes (2024). *Adaptations in Audiovisual production in Europe*. European Audiovisual Observatory