SPAIN: MORE WOMEN AND GREATER PROMINENCE, BOTH IN FRONT OF AND BEHIND THE CAMERA

DOI: https://doi.org/10.7764/obitel.26.e.esp

Authors:
Charo Lacalle (https://orcid.org/0000-0002-0024-6591)
Beatriz Gómez-Morales (http://orcid.org/0000-0002-0557-528X)
Sara Narvaiza (https://orcid.org/0000-0002-5092-2690)
Javier Mateos-Pérez (https://orcid.org/0000-0003-2056-8704)[1]
Mireya Vicent-Ibáñez (https://orcid.org/0000-0002-8331-5387)
Team: *Rosa Ferrer, Raquel Crisóstomo, Tatiana Hidalgo-Marí, Jesús Segarra-Saavedra, Irene Sorrentino, Maria Porta*

Introduction

Once again, Spanish television fiction demonstrates the strength of its production, as reflected both in the number of new releases and in the slight increase compared with the previous year (89 in 2025 versus 86 in 2024). Thrillers stand out, accounting for a total of 22 thriller series and miniseries, in a year in which comedy confirms its recovery on video-on-demand (VoD) platforms, while soap operas reaffirm their dominance in linear television programming. This production landscape is accompanied by an increase in both the number and the prominence of female characters. From an intersectional perspective, this is reflected in the higher average age of female protagonists and the growing number of lesbian women represented on screen.

1. The Audiovisual Context of Spain in 2025

For the fifth consecutive year, traditional television viewing has declined, in contrast to the growing number of viewers using hybrid television services (internet, recorded content, video games, and DTT radio). The annual weighted audience share of the three major generalist television channels increased compared with the previous year (33.3%, +0.4), as did that of the regional public channels (8.5%, +0.4) and the pay-TV thematic channels, which reached a new record high (11.4%, +0.5).

[1] Javier-Mateos Pérez is the author of section 6 (Theme of the 2025: Women Behind the Camera in Ibero-American Television Fiction).

1.1 Open television in Spain

Traditional television viewing fell to a historic low of 162 minutes per person per day, representing a decrease of nine minutes compared with the previous year (-5.3%). By contrast, hybrid television consumption (internet, recorded content, video games, and DTT radio) reached its highest annual figure, with 55 minutes per person per day (four minutes more than in 2024, +8%). As a result, total television consumption (traditional broadcast, conventional pay TV, and hybrid television) amounted to 216 minutes per person per day, only five minutes less than in 2024 (-2.3%). These figures confirm a trend identified in the last four editions of this Yearbook: although traditional television viewing continues to decline, television sets maintain their remarkable ability to attract audiences thanks to their expanding range of functionalities.

Table 1. National open television channels in Spain

Ownership	**Public Stations (14)**		**Private Stations (9)**	
State (national coverage)[2]	**First channel (14)**	**Second channel (15)**	**First channel (9)**	**Second channel (18)**
	La1	La2 24H Clan Teledeporte	Antena3, Cuatro, LaSexta, Tele5	Atreseries, BEMADtv, Boing, BOM Cine, Divinity, DKISS, DMax, Energy, FDF, Mega, Neox, Nova, Paramount Network, Real Madrid HD, Squirrel, Ten, Trece, Veo7
Autonomic (regional coverage)	Á punt, Aragón TV, CanalSur, CMM, Canal Extremadura TV, IB3, ETB1, La 7TV, Telemadrid, TPA, TV3, TVCAN, TVG	3CatInfo, AND-TV, Esport3, ETB2, ETB3, ETB4, LaOtra, SX3/33, TPA2, TV3CAT, TVG2	8Madrid, HitTV, La7, La8, La 8 Mediterráneo	
TOTAL STATIONS = 23 TOTAL CHANNELS = 56				

Source: Obitel España

Antena3 retained its leadership for the fourth consecutive year (12.8%, +0.2), ranking as the most-watched channel on 292 days of 2025, from Monday to Saturday and across the midday, afternoon, and prime-time slots. La1 (11.1%, +0.7) experienced substantial audience growth thanks to its new current affairs and political programming, achieving its highest audience share in 13 years and consolidating its position as the second most-watched channel. It also became the leading choice among the

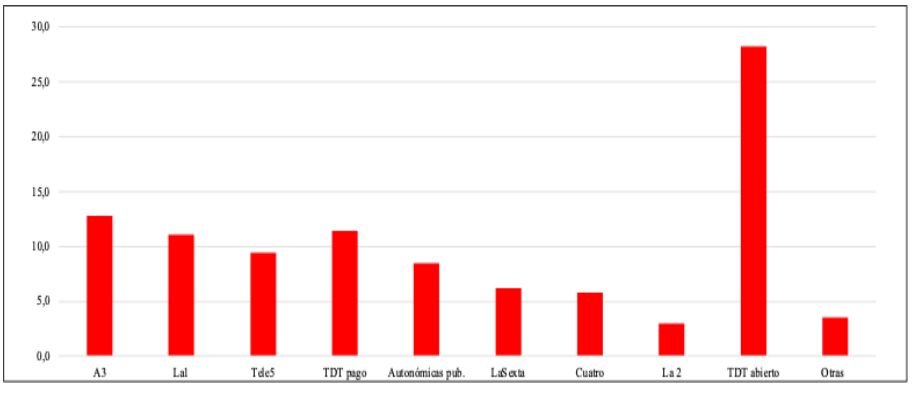
2 Translator note: In the Spanish case, "state coverage" or "national coverage" refer to networks that reach the whole country, while "autonomic coverage" refers to networks with regional coverage of their own Autonomic Communities. Both autonomic and state networks include public and private ownership.

so-called "commercial target" audience, the segment most sought after by brands and advertisers. By contrast, Telecinco recorded a new annual low (9.4%, -0.4), remaining in third place. La Sexta lost 0.1 percentage points (6.2%) but continued to outperform Cuatro, which increased its audience share in its twentieth anniversary year (5.8%, +0.4). La2 also improved its performance, reaching a 3.0% audience share (+0.3).

The combined audience share of the free-to-air thematic channels on Digital Terrestrial Television (DTT) continued its downward trend (28.2%, -1.7), largely due to the significant audience declines recorded by Divinity (1.4%, -0.5), FDF (2.4%, -0.2), Nova (2.0%, -0.2), and Ten (1.1%, -0.2). Among the most notable developments affecting DTT thematic channels in 2025 were the closure of Gol Play, which moved exclusively to pay-TV platforms under the name *Gol*, and the discontinuation of Disney Channel's free-to-air broadcasts, with its frequency being taken over by Squirrel, while its content remained available on the Disney+ streaming platform. Squirrel, the first channel launched by the Squirrel Media group, plans to begin 2026 with the launch of its second channel, Squirrel 2, on the frequency formerly occupied by Paramount Network.

Graph 1. Share by state channels

Networks	%
A3	12,8
La1	11,1
Tele5	9,4
Pay-TV	11,4
Regional public channels	8,5
LaSexta	6,2
Cuatro	5,8
La2	3,0
Free DTT	28,2
Others	3,5
TOTAL	**100**



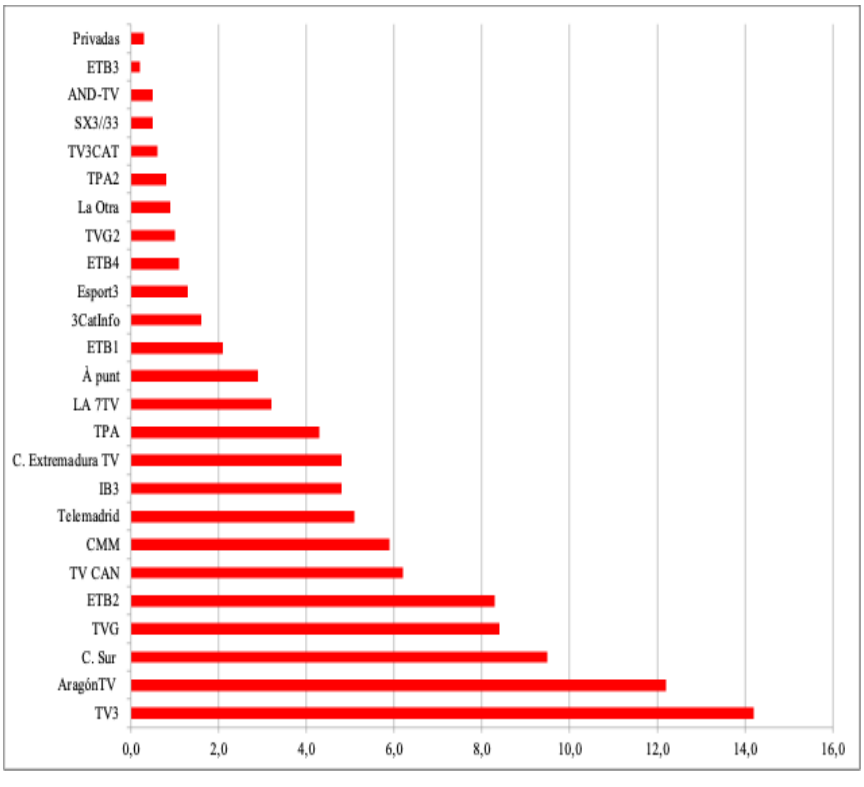
Source: Barlovento Comunicación/KantarMedia.

The regional public channels returned to the positive trend recorded between 2017 and 2023, reaching an 8.5% audience share (+0.4) and matching the all-time high achieved in 2023. Thus, the Federation of Regional Public Radio and Television Organizations (FORTA) confirms its position as an audience alternative through its regional and local programming, leading the ratings in some geographical areas. In Catalonia, for example, TV3 (14.2%, +0.5) is the channel with the highest audience

share, confirming its leadership for the sixteenth consecutive year. It is followed by AragónTV (12.2%, +0.6), which reaches a new all-time high; CanalSur (9.5%), which gains one percentage point; and TVG, which records a new annual low (8.4%, -0.2). By contrast, the combined audience share of the private regional broadcasters increased by 0.1 percentage points, reaching 0.3%.

Graph 1a. Share by regional networks

Networks	%
TV3	14,2
AragónTV	12,2
C. Sur	9,5
TVG	8,4
ETB2	8,3
TV CAN	6,2
CMM	5,9
Telemadrid	5,1
IB3	4,8
C.Extremadura TV	4,8
TPA	4,3
LA 7TV	3,2
À punt	2,9
ETB1	2,1
3CatInfo	1,6
Esport3	1,3
ETB4	1,1
TVG2	1
La Otra	0,9
TPA2	0,8
TV3CAT	0,6
SX3//33	0,5
AND-TV	0,5
ETB3	0,2
Regional private channels	0,3
TOTAL	**100**



Source: Barlovento Comunicación/KantarMedia.

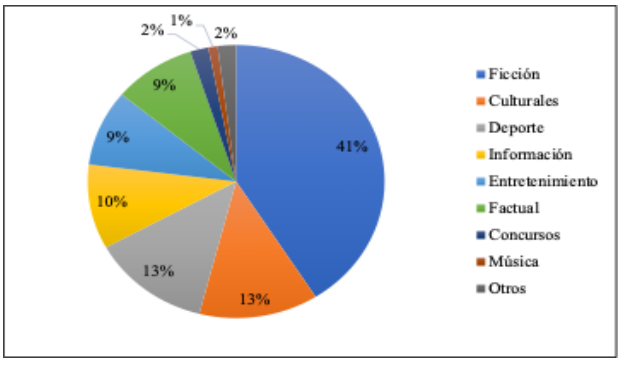
Atresmedia (26.1%) remained the leading media group despite a decline of 0.3 percentage points, followed by Mediaset (24.4%, -0.5). The combined audience share of the two groups continued to account for more than half of the total (50.5%), although this represented a decline of 0.8 percentage points compared with the previous year. RTVE confirmed its positive trend, increasing by 0.8 percentage points (16.6%), as did FORTA, which gained 0.4 percentage points (8.4%). Squirrel Media (2.6%) maintained the same audience share as the previous year, while Unidad Editorial lost 0.2 percentage points (2.4%).

Fiction remained the most prominent genre across all television channels, recording the same figures as in the previous three years (41%), followed by cultur-

al programming (13%) and sports (13%), both of which also matched their 2024 results. Fiction was the leading genre across all three types of channels: national free-to-air channels (47%), regional channels (28%), and pay-TV thematic channels (51%). It was also the genre with the highest average audience share (35%, -0.1), mainly driven by the pay-TV thematic channels (47%).

Graph 2. Genres in TV programming

Genre	%
Fiction	41
Culture	13
Sports	13
News	10
Entertainment	9
Factual	9
Contests	2
Music	1
Others	2
TOTAL	**100**



Source: Barlovento Comunicación/KantarMedia.

1.2. Pay TV and VoD platforms in Spain 2025

DTT remained the main television content distribution system in Spain (70.4%, -0.7), although it reached a new all-time low as a result of the increase in viewing through pay television (IPTV, cable, digital satellite, and OTT services), which, by contrast, recorded a new all-time high (29.6%, +0.7), driven by the growth of IPTV services (20.3%, +0.4).

The pay-TV thematic channels, which have continued to gain viewers since 2013, reached a new annual high of 11.4% (+0.5). In 2015, traditional pay television recorded an audience share of 6.8%. Ten years later, in 2025, this television model reached an audience share of 11.4%, representing a growth of 67.6% over the decade. Its evolution reflects, with remarkable accuracy, the transformation of Spain's audiovisual ecosystem: greater content availability, increased audience fragmentation, and the growing importance of non-linear viewing integrated into pay-TV platforms.

Table 2. Pay television in Spain

10 most watched pay TV channels in Spain			
Channel	**Genre**	**Source**	**% Pay[3]**
LALIGA TV por M+	Soccer	Spain	2,8
Movistar Plus+	Entertainment	Spain	2,6
DAZN LaLiga	Soccer	Spain	2,6
Warner TV	Fiction	USA	2,3
Star Channel	Fiction	USA	2,1
Liga de campeones por M+	Soccer	Spain	1,7
Canal Hollywood	Film	USA	1,6
AXN	Fiction	USA	1,5
Calle13	Fiction	USA	1,3
Eurosport	Sports	France	1,3

Source: Barlovento Comunicación/KantarMedia

The leading international SVoD platforms in Spain are Netflix, Amazon Prime Video, Disney+, HBO Max (Warner Bros. Discovery), DAZN, SkyShowtime, and Apple TV+. The most prominent Spanish platforms are Movistar+ (Telefónica), Atresplayer Premium, Filmin, Mediaset Infinity, and FlixOlé.

1.3. Financing sources for the audiovisual sector

During 2025, television remained the leading medium in terms of advertising revenue, accounting for 28.5% (-1.6%) of the total advertising market, with an investment of €1,784.4 million, 4.4% less than in the previous year[4]. Of this total, €1,513.7 million corresponded to non-digital television and the remaining €270.7 million to digital television. The previous year, non-digital television reached €1,647.6 million, while digital television accounted for €209.5 million, implying a decline of 8.1% for the former and a growth of 29.1% for the latter. Thus, although total television advertising investment declined slightly in 2025, the disaggregated figures appear to challenge the myth that the economic value of television advertising has diminished; rather, it is changing its "platform," with investment shifting from traditional channels to digital ones.

However, in 2025, advertising investment in the national free-to-air television sector declined by 9.4%, bringing its market share to 75.6%, with total revenue of €1,348.9 million. Atresmedia generated €621.8 million, representing a 9.5% decrease compared with 2024 and a market share of 34.8%. Mediaset España, with a decline of 9.7%, generated €615.8 million, corresponding to a 34.5% share of the television advertising market. In terms of audience share, Atresmedia achieved 26.1%, while

[3] Percentage of the channel's screen share in relation to pay television as a whole.
[4] For more information: https://www.infoadex.es/es#annual-report

Mediaset España recorded a weighted audience share of 24.4%. Consequently, their combined audience share amounted to 50.5%, whereas their combined share of advertising investment reached 69.3% of the total. Overall, the power ratio of Atresmedia and Mediaset España indicates that, taken together, they generate advertising revenues substantially higher than would be expected based on their audience share alone.

1.4. Communication policies

In 2024, Royal Decree-Law 5/2024 of 22 October was enacted, amending the 2006 law to facilitate the renewal of RTVE's Board of Directors by lowering the parliamentary voting thresholds (from a two-thirds majority to an absolute majority in the second vote) and increasing the number of board members (from 11 to 15, with 11 appointed by the Congress of Deputies and 4 by the Senate). In addition, the Royal Decree-Law grants RTVE's new President greater executive authority and broader decision-making powers over matters that were previously the responsibility of the Board of Directors.

On 2 December 2024, José Pablo López assumed the presidency of the Spanish Radio and Television Corporation (RTVE). He is the first President of RTVE whose expenditure on programming, as well as other current operating expenses, does not require prior approval from the Board of Directors. This has enabled him to pursue a notably expansive spending policy in the acquisition of broadcasting rights and the purchase of programmes of all types, contributing to the corporation's significant audience growth in 2025. Nevertheless, the President has stated that he intends to follow the path taken by the BBC in 2024, which involves reducing costs and eliminating duplication to make the corporation more efficient.

1.5. Digital and mobile connectivity infrastructure

According to the *Connected TV Study 2025* conducted by IAB Spain and Elogia, and sponsored by Publiespaña[5], connected television has become firmly established in Spain as a widespread and cross-generational habit: 95% of internet users aged 16 to 75—almost 34 million people—use internet-based audiovisual content services on television. Most users are between 16 and 54 years of age, and fiction remains the most widely consumed type of content. The continued growth of connected television reflects changing audience viewing habits, but it also represents a unique opportunity for advertisers, who can benefit from the strength and reach of television while taking advantage of the precision and targeting capabilities of the digital environment.

[5] For more information: https://iabspain.es/estudio/estudio-television-conectada-2025-iab-spain/

2. Analysis of the year: the National and Ibero-American Fiction Premiere on Open TV in 2025

The 89 fiction premieres released in 2025 exceeded the 86 recorded the previous year by three, with the same number of titles on free-to-air television (27 in 2024) and 62 on VoD (59 in 2024), three of which were released on the platforms of the Basque and Galician regional broadcasters, respectively (one title on Primeran and two on A Galega). Thirteen of the premieres on linear television were broadcast by the national channels (12 in 2024), while the remaining 14 were released by the regional broadcasters (15 in 2024). As for the Ibero-American contribution, although it matched the four titles released the previous year, the main development was the incorporation of Televisa-Univision's VIX platform into Atresplayer on 28 January 2025, significantly expanding the options available in Spain for accessing Spanish-language fiction produced overseas.

The sector's high level of activity has undoubtedly been supported by the Government's "Spain Audiovisual Hub" initiative, launched within the framework of the Audiovisual Recovery, Transformation and Resilience Plan, which, between 2021 and 2025, received approximately €1.6 billion to strengthen the production of both television fiction and films.[6] This has proved to be a successful strategy, as reflected both in the growth of domestic consumption (24.3% of viewers watch television fiction every day and 58% at least once a week[7]), and in exports. In the latter area, the ICEX and Parrot Analytics report presented at MIPCOM 2025 confirmed that Spain had achieved a 26.1% success rate in the Global Streaming Index, the highest among production countries in Europe and Latin America during the period from 2022 to the first half of 2025.[8]

TVE led the national free-to-air broadcasters in terms of the number of fiction premieres, with nine titles. Antena 3 and Telecinco released two titles respectively.

[6] For more information: https://spainaudiovisualhub.digital.gob.es/es/home

[7] See the *Survey of Cultural Habits and Practices in Spain 2024–2025*, prepared by the Statistics and Studies Division of the Technical General Secretariat of the Ministry of Culture. Available at: https://www.cultura.gob.es/dam/jcr:f6d9b66a-ac72-4d89-8986-7f6c6e94aaa5/encuesta-de-habitos-y-practicas-cultures-en-espana-2024-2025.pdf

[8] For more information: https://www.icex.es/es/sala-prensa/notas-de-prensa/2025/10/ICEX_MIPCOM_2025

TABLE 1. Premiere fictions shown in 2025 on state channels

PREMIERE NATIONAL TITLES - 14	PREMIERE FOREIGN TITLES - 4
Antena3	**Divinity**
1. *Sueños de Libertad* (serial)	1. *Cacao* (telenovela-Portugal)
2. *La Encrucijada* (serial)	**Nova**
Telecinco	2. *Eternamente Amándonos* (soap opera-Mexico)
3. *Desaparecidos* (serie)	3. *Mi Fortuna Es Amarte* (soap opera-Mexico)
4. *La Agencia* (series)	4. *Mi Secreto* (soap opera-Mexico)
5. *La Favorita 1922* (series)	
TVE1	
6. *Ena* (miniseries)	
7. *Sin Gluten* (series)	
8. *La Promesa* (serial)	
9. *Salón de Té La Moderna* (serial)	
10. *Valle Salvaje* (serial)	
11. *Asuntos Internos* (series)	
12. *Weiss y Morales* (miniseries)	
13. *Perverso* (series)	
14. *Custodia Repartida* (series)	**TOTAL PREMIERE TITLES: 18**

Source: Obitel España

Catalan public television TV3 accounted for six of the 14 titles released by the regional broadcasters. Galicia's TVG premiered four series, including a co-production with Portugal; the Basque broadcaster ETB1 released two, while the Balearic broadcaster IB3 and the Valencian broadcaster À Punt each premiered one series.

TABLE 1a. Premiere fictions exhibited in 2025 on regional channels

PREMIERE REGIONAL TITLES - 14	PREMIERE FOREIGN TITLES - 0
À Punt	
1. *L´Alqueria Blanca* (series)	
ETB1	
2. *Go!azen* (series)	
3. *Zeru Ahoak* (miniseries)	
IB3	
4. *Norats* (miniseries)	
TV3	
5. *Com Si Fos Ahir* (serial)	
6. *El Creador de Influencers* (series)	
7. *El Mal Invisible* (series)	
8. *Jo. Mai Mai* (series)	
9. *Sala Polivalent* (anthology)	
10. *Vintage* (series)	
TVG	
11. *A Coral* (series)	
12. *Era Visto: A choupana* (series)	
13. *Lume* (single)	
14. *O Home Perfecto* (series)	
	TOTAL PREMIERE TITLES : 14

Source: Obitel España

In line with previous years, the continued expansion of fiction on the VoD platforms of public broadcasters has significantly reduced the linear repeat fiction of both 2025 premieres and reruns. Examples include the rebroadcasts of *Ángela* (2024) and *Eva & Nicole* (2024) on Disney+ following the agreement between Atresmedia and the streaming platform, which has also fostered further collaborative initiatives. These include the simultaneous release on both platforms of *Mar Afuera*, a remake of the RAI teen drama *Mare Fuori*, and the Disney+ comedy *Custodia Compartida*, whose first two episodes premiered on LaSexta, while the remaining six were released exclusively on the U.S. platform.

TVE continued its partnership with Prime Video through the simultaneous release of *Sin Gluten* (following the free-to-air broadcast of its first episode) and the addition of *Perverso* to Amazon's streaming platform in April, after its broadcast on La1 in February. As for reruns on the generalist television channels themselves, current scheduling strategies have become increasingly unsystematic. Nevertheless, one notable development was the rebroadcast by regional broadcasters of titles originally released on both the major national channels and streaming platforms, such as Antena 3's long-running serial *Amar Es Para Siempre* (2013–2024) on Telemadrid and *Las Pelotaris* on À Punt following its release on Movistar+ in 2023. Another

noteworthy case is the success of the reruns of *L'Alqueria Blanca* on the Valencian broadcaster, as reflected in the narrow gap of just 0.7 percentage points between the average audience share of its nine reruns broadcast during weekends in 2025 (3.9%) and that of the premiere episodes of its seventeenth season (4.6%).

Finally, it should be noted that the relatively small number of Ibero-American telenovelas broadcast on Divinity and Nova (the digital channels of Mediaset España and Atresmedia, respectively) resulted in the rebroadcast during 2025 of a considerable number of landmark titles, these include *La Doña*, *Ana de Nadie*, *Yo Soy Betty, La Fea*, *Soy Tu Dueña*, *El Clon*, and *Mía Es La Venganza*.

Table 2. Formats of new national fiction in 2025 and their evolution over a five-year period

Format	Titles						Hours					
	2021	2022	2023	2024	2025	Total	2021	2022	2023	2024	2025	Total
Serial	5	3	7	6	5	26	754:55:00	480:00:00	747:35:00	821:25:00	788:55:00	3592:50:00
Series	8	5	8	6	6	33	70:35:00	73:30:00	48:00:00	44:30:00	53:10:00	289:45:00
Miniseries	0	1	0	0	2	3	0:00:00	3:00:00	0:00:00	0:00:00	15:40:00	18:40:00
Tvmovie	0	1	1	0	0	2	0:00:00	1:30:00	2:40:00	0:00:00	0:00:00	4:10:00
Docudrama	0	0	0	0	0	0	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00
Others	0	1	0	0	0	1	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00
Total	13	11	16	12	13	65	825:30:00	558:00:00	798:15:00	865:55:00	857:45:00	3905:25:00

Source: Obitel España

The broadcast time of national free-to-air premieres (857 hours and 5 minutes) was slightly lower than in 2024 (865 hours and 55 minutes), despite there being one more title than the previous year. However, the most significant feature of the overview presented in table 2 is the stability of Spanish television fiction production, providing further evidence of its strength, particularly considering that the decline recorded in 2022 was primarily due to the effects of the pandemic on the audiovisual sector.

Table 2a. Formats of new national and regional fiction in 2025 and their evolution over a five-year period

Serial	6	6	10	7	6	35	860:55:00	742:40:00	977:35:00	928:25:00	842:40:00	4352:15:00
Series	20	14	19	17	16	86	168:35:00	150:30:00	122:15:00	160:00:00	157:10:00	758:30:00
Miniseries	4	3	2	1	4	14	1:40:00	9:10:00	4:40:00	2:15:00	21:40:00	39:25:00
Tvmovie	0	4	3	0	0	7	4:25:00	6:30:00	6:00:00	0:00:00	0:00:00	16:55:00
Docudr.	0	0	0	0	0	0	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00
Others	0	1	0	2	1	4	0:00:00	2:40:00	0:00:00	6:00:00	2:00:00	10:40:00
Total	30	28	34	27	27	146	1035:35:00	911:30:00	1110:30:00	1096:40:00	1023:10:00	5177:45:00

Source: Obitel España

The stability of production is also reflected in the combined output of the national and regional broadcasters, which released the same number of titles as the previous year (27). The difference in the total number of broadcast hours in 2025 (73 hours and 40 minutes fewer than in 2024) was mainly due to the lower number of episodes of TV3's serial *Com Si Fos Ahir* and, to a lesser extent, to the increase in the number of mini-series relative to series, which inevitably resulted in a lower total number of episodes.

Table 3. State fiction premieres in 2025: countries of origin

Country	Titles	%	Hours	%
NATIONAL (total)	**13**	**76**	**857:45**	**81**
OBITEL COUNTRIES (total)	**4**	**24**	**200:40**	**19**
Argentina	0	0	0:00	0
Brasil	0	0	0:00	0
Chile	0	0	0:00	0
Colombia	0	0	0:00	0
Ecuador	0	0	0:00	0
Spain	13	76	857:45	81
US Hispanos	0	0	0:00	0
Mexico	3	18	152:40	14
Peru	0	0	0:00	0
Portugal	1	6	48:00	5
Uruguay	0	0	0:00	0
Venezuela	0	0	0:00	0
CO-PRODUCTIONS (totales)	0	0	0:00	0
National Co-productions	0	0	0:00	0
Co-productions Countries Obitel	0	0	0:00	0
TOTAL	**17**	**100,00**	**1057:45**	**100**

Source: Obitel España

National fiction premieres accounted for 76% of the total number of titles. Their predominance was even greater in terms of broadcast time, with 81% devoted to domestic productions and 19% to productions from the other Obitel member countries.

Table 3a. State and regional premiere fiction in 2025: countries of origin

Country	Titles	%	Hours	%
NATIONAL (total)	**27**	**87**	**1022:50**	**84**
OBITEL COUNTRIES (total)	**4**	**13**	**200:40**	**16**
Argentina	0	0	0:00	0
Brasil	0	0	0:00	0
Chile	0	0	0:00	0
Colombia	0	0	0:00	0
Ecuador	0	0	0:00	0
Spain	26	84	1016:50	83
US Hispanos	0	0	0:00	0
Mexico	3	10	152:40	12
Peru	0	0	0:00	0
Portugal	1	3	48:00	4
Uruguay	0	0	0:00	0
Venezuela	0	0	0:00	0
CO-PRODUCTIONS (total)	1	3	6:00	1
National Co-productions	1	3	6:00	1
Co-productions Countries Obitel	0	0	0:00	0
TOTAL	**31**	**100**	**1223:30**	**100**

Source: Obitel España

These percentages increase when considering the total Spanish output (national and regional), with 87% of the premieres corresponding to Spanish productions and 13% to productions from the other Ibero-American countries, accounting for 84% and 16% of total broadcast time, respectively. In line with previous years, the Galician broadcaster TVG continued its collaboration with Portugal's RTP, in this case through the co-production of the thriller *Lume*, set in A Raia Seca, the border region between the two countries.

TABLE 4. Formats of national fiction and Obitel exhibited in 2025

Format	Titles				Hours			
	Nationals	%	Other Obitel	%	Nationals	%	Other Obitel	%
Serial	5	38,5	4	100.0	788:55:00	92.0	200:40	100.0
Series	6	46,2	0	0.0	53:10:00	6.2	0:00	0.0
Miniseries	2	15,4	0	0.0	15:40:00	1.8	0:00	0.0
Tvmovie	0	0.0	0	0.0	0:00:00	0.0	0:00	0.0
Docudrama	0	0.0	0	0.0	0:00:00	0.0	0:00	0.0
Others	0	0.0	0	0.0	0:00:00	0.0	0:00	0.0
Total	**13**	**100.0**	**4**	**100.0**	**857:45**	**100.0**	**200:40**	**100.0**

Source: Obitel España

By format, national free-to-air fiction was distributed almost evenly between serials (five titles) and series (six titles), although serials accounted for 92% of the total broadcast time. Two miniseries were also released this year, although it should be noted that the distinction between this format and the series is becoming increasingly blurred.

TABLE 4a. National and regional fiction formats Obitel exhibited in 2025

Format	Titles				Hours			
	National	%	Other Obitel	%	National	%	Other Obitel	%
Serial	6	22,2	4	100.0	892:55:00	87.3	200:40	100.0
Series	16	59,3	0	0.0	106:55:00	10.4	0:00	0.0
Miniseries	4	14,8	0	0.0	21:40:00	2.1	0:00	0.0
Tvmovie	0	0.0	0	0.0	0:00:00	0.0	0:00	0.0
Docudrama	0	0.0	0	0.0	0:00:00	0.0	0:00	0.0
Others	1	3.6	0	0.0	2:00:00	0.2	0:00	0.0
Total	**27**	**100.0**	**4**	**100.0**	**1023:30**	**100.0**	**200:40**	**100.0**

Source: Obitel España

The number of series increased substantially when considering the combined output of the national and regional broadcasters, with 16 premieres compared with six serials, in addition to four miniseries and one anthology series. Once again, however, there was a marked imbalance between the broadcast time devoted to serials (87.3%) and that allocated to the remaining formats (12.7%).

TABLE 5. 10 10 National most viewed titles in 2025

Title		Channel	Producer (Country)	Format/Genre	Chap./Ep.	Time slot	Thousands	Share	Rating
1	*Sin Gluten*	La1	Onza Entertainment (ES)	Series/Comedy	1	Prime time	1,214,000	17	2.6
2	*La Promesa*	La1	StudioCanal, Bambú Producciones (ES)	Serial/Drama	254	Evening	1,171,000	14	2.5
3	*Sueños de Libertad*	A3	Diagonal TV (ES)	Serial/Drama	253	Evening	1,195,889	13.7	2.5
4	*Ema*	La1	La Cometa TV (ES)	Miniseries/Biopic	5	Prime time	1,661,120	12.7	3.5
5	*La Encrucijada*	A3	Secuoya Estudios y Ay Yapim (ES)	Serial/Drama	60	Prime time	604,978	10.3	1.3
6	*La Favorita 1922*	T5	Bambú Producciones (ES)	Series/Drama	16	Prime time	843,500	10	1.8
7	*Valle Salvaje*	La1	Bambú Producciones y StudioCanal (ES)	Serial/Drama	251	Evening	762,338	9.9	1.6
8	*Salón de Té La Moderna*	La1	Boomerang TV y Mediawan (ES)	Serial/Drama	44	Evening	843,500	9.7	1.8
9	*La Agencia*	T5	Good Mood (ES)	Series/Comedy	13	Prime time	644,417	8.7	1.4
10	*Asuntos Internos*	La1	Mediacrest (ES)	Series/Thriller	6	Prime time	705,333	8.2	1.5
Total national productions: 10				Foreign original scripts: 0					
100%				0%					

Source: Obitel España

TVE placed six titles among the most-watched national fiction productions, while Antena3 and Tele5 each contributed two to the ranking, in which the outstanding performance of serials is particularly noteworthy, with all of them featuring in the year's top ten. Indeed, the second-place ranking of *La Promesa* (14% share) effectively represents the leading position, given that La1 broadcast only the first episode of the top-ranked title, *Sin Gluten* (17% share), while its remaining seven episodes premiered on Prime Video.

TABLE 5ª. 10 Regional most viewed titles in 2025

Title		Channel	Producer (Country)	Format/genre	Chap./Ep.	Time slot	Thousands	Share	Rating
1	*Com Si Fos Ahir*	TV3	TVC (ES)	Serial/Drama	208	Evening	234,000	19.3	3
2	*Vintage*	TV3	Brutal Media (ES)	Series/Dramedy	8	Prime time	237,000	15.6	3
3	*El Mal Invisible*	TV3	Mediapro, 3cat, The Mediapro (ES)	Series/Thriller	8	Prime time	265,000	14.9	3.4
4	*Jo Mai Mai*	TV3	Abacus (ES)	Series/Comedy	8	Prime time	150,000	10.8	1.9
5	*A Coral*	TVG	Tex45 (ES/POR)	Series/Comedy	13	Evening	69,000	8.7	2.6
6	*Era Visto: A Choupana*	TVG	Produciónss Zopilote (ES)	Series/Comedy	9	Prime time	44,000	5.7	1.7
7	*L'Alqueria Blanca*	À Punt	RTVV À Punt Mèdia (ES)	Series/Comedy	11	Prime time	63,000	4.6	1.2
10	*Lume*	TVG	Coral Europa, Sete media (ES/POR)	Series/Thriller	6	Prime time	23,000	4.2	0.9
8	*O Home Perfecto*	TVG	Voz Audiovisual (ES)	Series/Drama	13	Prime time	37,000	1.4	5.6
9	*El Creador de Influencers*	TV3	The Mediapro Studio, 3cat (ES)	Series/Comedy	8	Prime time	14,000	1.1	0.2
Total regional productions: 10				Foreign original scripts: 0					
100%				0%					

Source: Obitel España

TV3 once again topped the ranking of regional television fiction, with a total of five premieres, four of which occupied the leading positions in a ranking headed by the only serial in the group (19.3% share). The strong performance of TVG was also noteworthy on this occasion, with four titles among the most-watched productions in a year in which À Punt's series *L'Alqueria Blanca* also returned to the ranking. The Spanish–Portuguese co-production *Lume* ranked seventh.

3. VoD Monitoring 2025

The 63 fiction premieres released in 2025 (three more than in 2024) demonstrate the strong performance of the streaming platforms operating in Spain, which have progressively developed an increasingly integrated system of synergies and strategic partnerships aimed at surviving and thriving in an intensely competitive global market. As a result, Spain has become the second-largest country in terms of OTT investment in content production, with €2 billion invested—second only to the

United Kingdom (€2.9 billion) and well ahead of Germany and France, which rank third with €800 million each.[9]

3.1. VoD Platform Market in 2025

According to the twelfth wave of the OTT Barometer published by Barlovento Comunicación in December 2025, the overall ranking of international OTT platforms in Spain was led by Netflix (19 million unique monthly viewers), followed by Prime Video (17.2 million), YouTube (12.1 million), Disney+ (8 million), and HBO Max (7.6 million)[10]. The latest Household Panel (Q2 2025) published by the Spanish National Commission on Markets and Competition (CNMC)[11] confirms Netflix's leadership among subscription platforms (44.6% of households), followed by Prime Video (19.7%), Disney+ (6.0%), and HBO Max (5.3%). Netflix (73.7%) also ranked as the platform with the highest penetration in Spain according to the twenty-seventh wave of GECA[12] –the last survey of 2025 devoted exclusively to subscription platforms– followed by Prime Video, Disney+, and HBO Max. By contrast, the latest *VOD Audience Report* by SigmaDos30' (December 2025), which includes both subscription and free platforms, ranked Prime Video (73.8%) first, followed by Netflix (72.6%), HBO Max (32.0%), and Disney+ (31.2%).[13]

To mark its first ten years in Spain and the third anniversary of its ad-supported plan, Netflix released several figures relating to its advertising business: its ad-supported model in Spain has 10.2 million active monthly viewers, whose users consume an average of 46 hours of content per month—more than one hour per day[14]. The twenty-seventh edition of the "Internet Users Survey" (*Navegantes en la Red*), conducted by the Spanish Association for Media Research (AIMC), indicates that subscriptions to ad-supported plans on paid streaming platforms have increased over the past year, with Disney+ and Netflix recording the highest uptake of this type of subscription. The report concludes that 34.1% of Disney+ subscribers have an ad-supported plan (+24 percentage points year-on-year), while the equivalent figure for Netflix stands at 33.1% (+17 percentage points)[15].

---

[9] See the report by José M. Rodríguez Silva and Cinta Fosch published in the newspaper *El Mundo* on 27 September 2025. Available at:https://www.elmundo.es/economia/empresas/2025/09/22/68c98f30e9cf4a8b1b8b458c.html

[10] For more information: https://barloventocomunicacion.es/barometrotv-ott/11a-ola-diciembre-2025-barometro-ott-tv-conectada/

[11] For more information: https://www.cnmc.es/prensa/panel-sector-audiovisual-20251121

[12] For more information: https://webgeca.geca.es/barometro-ott-de-geca-27o-oleada/

[13] For more information: https://www.dos30.com/actualidad/category/audiencias-vod/

[14] For more information: https://elpais.com/economia/2025-11-05/netflix-supera-los-10-millones-de-usuarios-con-su-plan-de-anuncios-en-espana.html

[15] For more information: https://www.eldiario.es/vertele/series/suscripciones-publicidad-plataformas-netflix-disney-crecen-ultimo-ano_1_12203890.html

According to the twenty-seventh wave of GECA, all the subscription platforms included in the study (Netflix, Disney+, Prime Video, HBO Max, Atresplayer Premium, and SkyShowtime) have more subscribers on ad-supported plans than on ad-free plans, suggesting that most users prefer this pricing model[16]. In 2025, HBO Max also introduced an ad-supported subscription tier, priced at €6.99 per month (€69.90 per year), alongside a general increase in the price of its remaining subscription plans.

3.2. Offer of local VoD platforms in 2025

The twelfth wave of the OTT Barometer published by Barlovento Comunicación ranks Movistar+ (9.8 million unique monthly viewers) fourth in the overall ranking of streaming platforms in Spain, while RTVE Play (8.2 million) ranks fifth and Atresplayer Premium ninth (3.3 million). Data from the Spanish National Commission on Markets and Competition (CNMC) place Movistar+ (17.8% of households) in third position, whereas the twenty-seventh wave of GECA ranks it fifth. According to this audiovisual consultancy, Atresplayer Premium ranks tenth, followed by Filmin in eleventh place, Mediaset Infinity in twelfth, and FlixOlé in thirteenth. Finally, the latest VOD Audience Report by SigmaDos30' ranks Movistar+ (23.4%), RTVE Play (19.6%), and Atresplayer Premium (12.4%) in fifth, sixth, and seventh place, respectively.

3.3. VoD analysis in 2025: national premiere fiction and co-productions

In 2025, Netflix led the streaming platforms in terms of fiction premieres, with 15 titles (11 in 2024). It was followed by Movistar+ with 10 titles (eight in 2024) and Prime Video, which also released 10 titles (10 in 2024). Atresplayer ranked fourth with nine premieres (11 in 2024), while Disney+ followed with seven (nine in 2024). SkyShowtime (one in 2024) and HBO Max (no premieres in 2024) each released three titles, while Apple TV+ premiered one title (none in 2024). These figures also include the previously mentioned releases on the regional platforms A Galega (two titles) and the Basque platform Primeran (one title), marking the first time that two regional public broadcasters premiered their fiction on their streaming platforms rather than on their primary linear channels.

[16] For more information: https://webgeca.geca.es/barometro-ott-de-geca-27o-oleada/

TABLE 7. National fictions and co-productions exhibited in 2025 on VoD systems

NATIONAL PREMIERES	PREMIERE CO-PRODUCTIONS
Apple TV (1) *01. A Muerte (series)* **Atresplayer (9)** *02. El Gran Salto (series)* *03. Física o Química. La Nueva Generación (series)* *04. La Ruta. Volumen 2: Ibiza (series)* *05. Las Hijas de la Criada (series)* *06. Los Protegidos: Un Nuevo Poder (series)* *07. Mar Afuera (series)* *08. Mariliendre (series)* *09. Perdiendo El Juicio (series)* *10. Santuario (series)* **Disney + (6)** *11. Custodia Repartida (series)* *12. El Clan Olimpia (miniseries)* *13. El Mal Invisible (series)* *14. Entrepreneurs (series)* *15. La Suerte. Una Serie de Casualidades (series)* *16. Ladrones. La Tiara de Sánta Águeda (series)* **Filmin (1)** *17. Una Perra Andaluza (series)* **HBO Max (3)** *18. Cuando Nadie Nos Ve (series)* *19. Furia (series)* *20. Pubertad (series)* **Movistar+ (10)** *21. Anatomía de Un Instante (miniseries)* *22. La Canción (miniseries)* *23. La Caza. Irati (series)* *24. La Vida Breve (series)* *25. Los Sin Nombre (series)*	62. *Dime Tu Nombre (miniseries-España y EEUU)*
26. Muertos S.L. (series) *27. Poquita Fe (series)* *28. Silencio (series)* *29. Tierra Alta (series)* *30. Yakarta (series)* **Netflix (15)** *31. Animal (series)* *32. Ciudad de Sombras (series)* *33. Dos Tumbas (miniseries)* *34. El Cuco de Cristal (series)* *35. El Jardinero (series)* *36. El Refugio Atómico (series)* *37. Innato (series)* *38. La Chica de Nieve 2: El Juego del Alma (series)* *39. Legado (series)*	

40. Machos Alfa (series) *41. Manual Para Señoritas (series)* *42. Olympo (series)* *43. Respira (series)* *44. Superstar (series)* *45. Valeria (series)* **Prime Video (10)** *46. Atasco (antology)* *47. La Frontera (series)* *48. La Que Se Avecina (series)* *49. Memento Mori (series)* *50. Punto Nemo (series)* *51. Romi (series)* *52. Sin Gluten (serie)* *53. Su Majestad (series)* *54. Zoomers (series)* **Primeran (1)** *55. Desagertua (series)* **Skyshowtime (3)** *56. Camino a Arcadia (series)* *57. Matices (series)* *58. Nails (series)* **TVEplay (1)** *59. Bocas de Cielo (series)* **A Galega (2)** *60. A Arte de Ser (Mal) Pai (miniseries)* *61. A Coral (series)*	
	Total: 62

Source: OBITEL España

3.4. Narrative features of VoD in 2025

The high number of VoD premieres, together with the fragmentation of Spain's audiovisual production sector (Lacalle & Sánchez, 2019), makes it difficult—if not impossible—to construct a representative profile of the narrative characteristics of VoD fiction. Suffice it to say that, in 2025, a total of 52 independent production companies were involved, producing 41 fiction titles on their own and 11 through partnerships. It should be noted, however, that within this complex production landscape it is not uncommon for several companies to belong to, or be partly owned by, larger corporate groups. For example, Banijay Iberia encompasses leading production companies such as Diagonal TV, DLO Producciones, Portocabo, and Bambú Producciones, while the French group Mediawan España includes Boomerang TV, Good Mood (*La Agencia*), and Zeta Studios.

As in previous years, most streaming fiction consisted of episodic series, typically comprising six to eight episodes of approximately 50 minutes each. Of the 63 series

released on VoD platforms, 84% premiered their first season in 2025, in a context in which renewals are becoming increasingly uncommon: only seven series released a second season, two a third, and another two a fourth. *La Que Se Avecina* deserves special mention in this regard, with the premiere of the seven episodes comprising its sixteenth season during the year.

Nevertheless, it is possible to identify several defining features of contemporary thrillers, which stood out in a year when thriller series and miniseries (22 titles) outnumbered dramas (15 titles), traditionally the most popular genre, and even comedies (15 titles), which have experienced a notable resurgence in recent years.

4. Interactivity and audience participation

The scarcity of initiatives aimed at expanding the viewing experience became even more pronounced in a year in which the only creative and innovative proposals came from the serial format—the only format that continues to resist binge-watching and still requires audiences to remain engaged daily. Accordingly, this section focuses on the three serials broadcast throughout 2025: *Sueños de Libertad*, *La Promesa*, and *Valle Salvaje*. The analysis examines their audience engagement and expansion strategies on Instagram and TikTok, the two social media platforms most widely used by Spanish television fiction because of their audiovisual orientation. *Sueños de Libertad* was the television ratings leader, although not in terms of social media audiences, where *Valle Salvaje* stood out with 127,000 Instagram followers, 187,600 TikTok followers, and 6 million likes as of 31 December 2025. *La Promesa* had 103,000 Instagram followers, 50,200 TikTok followers, and 917,300 likes on TikTok. Finally, *Sueños de Libertad* had 69,300 Instagram followers, together with 22,100 TikTok followers and 651,900 likes on the platform.

The social media content of the three serials shares a common focus on discussions of storylines, characters, and theories about the future development of both. Occasionally, *Valle Salvaje*'s posts explore the interests of its most popular characters,[17] but its strategy relies primarily on behind-the-scenes content and humorous videos, particularly on TikTok, where the characters are shown in modern-day situations or taking part in twenty-first-century challenges. Polls, historical curiosities, and the promotion of spin-off products (for example, the recently released official companion book, *Valle Salvaje y la España Oculta*, by Alberto Barrera) are also recurring features of its social media activity. Its virality, however, is largely attributable to its inclusion in Netflix's catalogue and to the fact that it has attracted a

[17] They also frequently publish content about historical novels and strong female protagonists, such as the novel that inspired Adriana's character, as well as about eighteenth-century fashion and creative activities, such as knitting.

younger audience than the other daily afternoon serials. The social media strategy of *La Promesa* includes facts and curiosities about the historical events that inspired the series, behind-the-scenes insights into its production, celebrations of the programme's achievements—such as its International Emmy Award—and initiatives designed to encourage audience participation through discussions of storylines in spaces such as *El Club de La Promesa*, where viewers and journalists debate the latest plot developments. Finally, the social media content of *Sueños de Libertad* capitalises on the *#Mafin* phenomenon, the hashtag through which the romantic relationship between the characters Marta and Fina became popular; celebrates the serial's television success; and promotes its filming locations (primarily Toledo) to reinforce its visual authenticity. Nevertheless, its social media content follows a more conventional style, and its strategy tends to be more institutional than that of its RTVE competitors, which place greater emphasis on vertical content and viral clips.

Sentiment analysis of audience comments posted on Instagram and TikTok about *Valle Salvaje* during 2025 reveals a clear progression from initial curiosity to deep emotional engagement, with a highly committed audience displaying a strong emotional connection to the series. The predominant sentiment was one of empathy and "positive anxiety" in response to plot revelations and twists, fuelled by the serial's daily previews. Positive comments also frequently praised the production's visual quality, although by mid-year viewers were calling for a faster narrative pace. Later, at the end of the second season (August), Julio's death shocked the audience, triggering a wave of sadness and frustration.

In the case of *Sueños de Libertad*, audience responses reflected a predominantly positive and enthusiastic sentiment, driven mainly by the fandom phenomenon surrounding *#Mafin* and by the series' audience milestones. The *#Mafin* phenomenon was, in fact, the main driver of audience interaction, with comments often combining romantic enthusiasm with social advocacy. The series' first anniversary in February, together with the cast's message of thanks to the community in June for keeping the programme as the most-watched television series, also generated peaks of positive sentiment. By contrast, negative and critical reactions stemmed primarily from leaks and spoilers resulting from the early release of episodes on Atresplayer Premium ahead of their free-to-air broadcast, as well as from dramatic plot twists and the departure of key characters toward the end of the year.

Finally, the analysis of audience responses to *La Promesa* also reveals a predominantly positive sentiment, largely driven by the fan community surrounding the series' central romantic couple, Jana and Manuel. Their relationship generated the highest level of audience interaction, with comments alternating between expressions of support and frustration over the obstacles they faced. Another key factor

contributing to audience enthusiasm and comic relief was the publication of behind-the-scenes content and bloopers. Nevertheless, despite viewers' overall satisfaction with the series, two issues overshadowed audience responses: the death of the protagonist, Jana, and the frequent changes to the broadcast schedule. Jana's death triggered a wave of shock, profound sadness, and disbelief, with many viewers questioning whether the series could continue without its heroine. At the same time, repeated schedule changes due to special programming prompted numerous complaints and generated a strong sense of indignation among loyal viewers. The volume of these reactions was such that RTVE's Audience Ombudsperson publicly addressed the complaints concerning both the direction of the storylines and the broadcaster's treatment of the series' followers.

5. Highlights of the Year 2025

The growing prominence of female characters has been accompanied by a marked increase in middle-aged women occupying leading roles. This trend is, in turn, linked to the decline in the number of sexual scenes observed in recent years, which undoubtedly contributes to greater intersectionality. *Furia* (HBO Max) exemplifies both developments through the story of five women in their fifties who rebel against the men who, for different reasons, constrain their lives, in an interwoven narrative that combines suspense and (black) humour with remarkable effectiveness. Its success has already led to the commissioning of a second season. Similarly, the Civil Guard officer Lucía (*Cuando Nadie Nos Ve*), the Basque police officer Alaya (*Romi*), and the head of Spain's intelligence service, Aitana (*El Centro*), are all portrayed as constantly confronted either by dangerous criminals (Lucía and Alaya) or by the pressures of political manipulation (Aitana).

Another noteworthy development concerning female protagonists and intersectionality is the substantial increase in the number of lesbian and bisexual women, as well as female characters who begin to redefine their sexual identity following their first same-sex relationship. Júlia in *Delta* (TV3) and Sandra in *Segunda Muerte* (Movistar+) explore this newly discovered dimension of their sexuality, which had apparently remained unrecognized until then, while Romi's response to Nerea's declaration of love in *Romi* fluctuates between bewilderment and ambiguity.

The adolescent stories portrayed in *Pubertad* explore, without reservation—although not with the starkness of *Adolescence* (Netflix)—the complexities of one of the most turbulent stages of life. Directed by filmmaker Leticia Dolera, this well-crafted experimental drama is nevertheless somewhat hindered by its slow pacing. Generational conflicts, which are common in both drama and comedy, also

feature prominently in the crime genre through the relationships between the widowed protagonists Lucía (*Cuando Nadie Nos Ve*) and Alaia (*Romi*) and their respective daughters, who, by contrast, enjoy an excellent relationship with their paternal grandmothers, with whom they also share the family home. *Romi* is particularly noteworthy because Alaia's daughter—who gives the series its title (Romi derives from Romina) and also plays a central role—is deaf as a result of an explosion at the age of eight in which her father was killed. Throughout the series, she communicates extensively through sign language while also using the hearing provided by her cochlear implant.

Comedy also deserves special mention this year for the way in which series such as *Poquita Fe* and *Machos Alfa,* successfully reinvent the well-worn tradition of Spanish *costumbrismo* through generous doses of absurd humor. The former portrays the surreal everyday life of Berta and José Ramón, a lower-middle-class couple whose relationship miraculously survives despite the constant chaos surrounding them. Widely regarded by critics as one of the finest series of its time, it is packed with comic inventions and running gags that effortlessly draw viewers into a kind of contest between lovable losers in whom many contemporary Spanish couples are likely to recognize themselves. *Machos Alfa*, by contrast, highlights the anachronism embodied by four friends in their forties, who oscillate between their attachment to traditional machismo and the need to adapt to a social environment in which gender relations are undergoing irreversible change. Under the pretext of searching for love, the protagonists become embroiled in a succession of absurd situations that consistently culminate in a hilarious deconstruction of traditional masculinity. The complexity of couple relationships is also explored through the challenges and tensions of co-parenting after separation in *Custodia Compartida*, which follows a divorced couple forced to move back in with their respective parents and share the upbringing of their five-year-old daughter.

Historical fiction maintained the high standards of quality achieved in previous years, despite its steady decline over recent seasons. Among the most notable titles is *Ena* (La1 and Prime Video), a biographical drama about the English wife of King Alfonso XIII, based on Pilar Eyre's novel of the same name. The series recounts the personal misfortunes of Queen Victoria Eugenie in a country that never truly understood her, but which she herself also failed to understand. *Anatomía de un Instante* is likewise an adaptation, this time of Javier Cercas's novel about the failed *coup d'état* of February 1981. Through a well-paced narrative supported by voice-over narration, the series explores the complex political context surrounding the assault on the Congress of Deputies and the role of the three prominent figures who remained standing despite the coup leaders' command, "Everybody on the floor":

Prime Minister Adolfo Suárez, the leader of the Communist Party Santiago Carrillo, and Lieutenant General Manuel Gutiérrez Mellado. *Asuntos Internos* reconstructs the experience of one of the first female inspectors in the National Police in a crime thriller that examines the impact of heroin and the devastation it caused in a working-class neighborhood of Madrid in 1979. Female solidarity and the scourge of heroin addiction in Spanish society at the time constitute the two central themes around which this fast-paced police drama is structured.

However, as every coin has two sides, the setbacks of 2025 include the disappointment generated by several productions that failed to meet the expectations they had raised. First, the post-apocalyptic thriller *El Refugio Atómico*, an ambitious project whose intention to innovate ultimately resulted in a simplistic plot and character design that is not without a degree of inconsistency. As a result, despite ending on a cliffhanger in the hope of securing a second season that might justify its substantial initial investment, the series has not achieved the desired renewal. *Olympo*, centred on a young woman who joins a high-performance training center for athletes, represents another misstep for Netflix in its attempt to fill the gap left by *Élite*, relying on the display of idealized bodies in a context of reduced sexual content, while failing to move beyond clichés and banal dialogue. *Punto Nemo* (Prime Video) starts from a promising premise that is ultimately undermined by the implausibility of its mixed crew (military personnel, scientists, influencers, journalists, etc.) embarking on a geological mission to the South Seas. However, it is arguably TVE that fares worst with *Weiss y Morales*, a police drama set within the German community in the Canary Islands, in which the lack of motivation behind character behavior occasionally borders on incoherence.

6. Theme of the Year: Women Behind the Camaras in Television Fiction

In Spain, television emerged during the Franco dictatorship, in a context in which cultural activity offered one of the few avenues through which some women were able to pursue professional careers. This was the case in literature, cinema, and television, where a handful of women achieved remarkable—though exceptional—success. However, the emergence of a genuinely female perspective in Spanish television is generally situated during the democratic Transition.

The advent of democracy brought about a profound transformation that reshaped Spain's political system and had a significant impact on the country's social and cultural landscape. Women experienced major advances in terms of freedom and equality, enabling them to gain greater access to the labour market. Public television embraced this period of change by producing content aimed at promoting democratic values

among citizens (Palacio, 2012). Many of the women who entered the television industry during this period went on to achieve considerable recognition for their work in television series, both behind and in front of the camera, beginning with the 1976–1977 season.

Among the most prominent professionals of this period was the playwright Ana Diosdado, who achieved considerable success in democratic Spain with television dramas that she both wrote and starred in, including *Anillos de Oro* (1983) and *Segunda Enseñanza* (1986). Other notable figures include the directors Pilar Miró, who directed *Los Enemigos* (1974), *Pequeño Teatro* (1977), and episodes of such popular series as *Curro Jiménez* (1976–1978), and Josefina Molina, who directed and adapted television dramas including *El Camino* (1978)—which won the Best Director Award at the International Television Festival in Prague—the landmark production *Teresa de Jesús* (1984), and *Entre Naranjos* (1998), for which she received the Academy of Television Award for Best Director (Cascajosa, 2010).

Male predominance continued following the end of the state television monopoly with the arrival of private broadcasters. This was a crucial moment, as television production expanded significantly in response to the launch of new channels and the competitive reaction of Spanish Public Television (TVE). Equally decisive was the introduction of the standardised television series production model imported from the United States, based on writers' rooms, which marked the beginning of modern television series production in Spain (Mateos-Pérez, 2023).

During this period, women increased their presence behind the camera in a medium that represented one of the most accessible entry points into the audiovisual industry and allowed for more stable career paths than film. Throughout the 1990s, several female creators stood out, such as the writer Carmen Martín Gaite, who adapted Elena Fortún's *Celia* saga (1993); Mercedes Segura, who contributed to the development of the popular series *Médico de Familia* (1995–1999); and Esther Jiménez, executive producer of the long-running *El Comisario* (1999–2008). In addition, women's professional roles were increasingly channelled into so-called "feminine" categories such as costume design, makeup, hairdressing, and script supervision/script continuity.

In the new century, independent production companies became a driving force in television fiction. The presence of women within the creative teams of these companies became both common and sustained, although they continued to work within mixed-gender groups in which men remained predominant. Among other notable female co-creators, it is worth mentioning professionals such as Verónica Fernández (*El Síndrome de Ulises*, 2007–2008), Diana Laffond (*Motivos Personales*, 2005), and Laura Belloso and Rocío Martínez-Llano (*El Internado*, 2007), as well as

directors such as Begoña Álvarez (*Periodistas*, 1998–2002; *Los Serrano*, 2003–2008) and Yolanda García Serrano (*Abuela de Verano*, 2005).

The introduction of streaming platforms in the second decade of the twenty-first century has driven significant transformations in television fiction, among which the increased presence of women stands out, resulting both from their greater visibility in acting casts and from their growing participation in technical and creative teams. This expansion is attributable to multiple factors, such as the implementation of public policies by progressive governments, the broader social debate on gender equality, the emergence of professional women's associations, increased access for women to university studies in audiovisual communication, film, and journalism, and the industry's improved recognition of female audiences. This trend has consolidated into a sizeable and stable group of female television creators (writers, directors, and producers) who currently pursue careers of notable merit and interest. Some are distinguished by commercially oriented projects aimed at audience success, such as executive producer Teresa Fernández-Valdés; producer and creator Virginia Yagüe, specialising in historical fiction; writer and creator Gema R. Neira; and Laura Caballero, co-creator of popular comedies. Others are characterised by a more auteur-driven approach and backgrounds outside television, such as playwright Anna R. Costa; film directors Mar Coll, Isabel Coixet, and Leticia Dolera; and actresses-turned-creators Ana Rujas and Claudia Costafreda.

Despite the progress achieved, series creation in Spain remains far from equal. Female creators report facing greater difficulties than their male counterparts, persistent prejudices regarding their ability to hold positions of responsibility, and challenges in promoting greater female representation within production teams (Torres, Castro, Díaz & Pérez, 2022). As a result, women remain underrepresented in many roles, accounting for approximately 38% of employment in the audiovisual sector; only 29% of directing roles are held by women, they represent 35% of screenwriters, and 31% of executive producers. By contrast, they are the majority in departments such as costume design (85%), makeup and hairdressing (80%), and art direction (64%), reflecting a clear gender-based occupational segregation. Furthermore, projects led by women tend to receive lower budgets (in some cases up to 42% less), and the persistence of stereotypes continues to typecast female characters into specific roles, genres, or themes (Marcos-Ramos & González de Garay, 2021).

In this context, it is worth asking whether works created by female authors offer distinctive narratives. The selection of titles discussed below presents a heterogeneous sample intended to illustrate some of the most relevant contributions of 2025. *Manual Para Señoritas* (Netflix) marks Gema R. Neira's first solo executive producer project. She is one of the leading figures in contemporary creation, whose professional

career was this year recognised by the Spanish General Society of Authors with its Honorary Medal for "being a fundamental part of the renewal of television fiction in Spain." The series, created together with María José Rustarazo, directed by Claudia Pinto and Carlos Sedes, and written by a predominantly female writers' room, foregrounds female protagonism in a fundamentally male-dominated context—the nineteenth century. The central character is a matchmaker hired by the widowed father of an upper-class family to supervise, accompany, and help his three daughters find suitable husbands. From this patriarchal premise emerges a romantic comedy of misunderstandings structured in eight episodes, whose novelty lies in its approach to period storytelling. To this end, *Manual Para Señoritas* adopts a vibrant visual style, using contemporary lighting, colour design, and soundtrack choices, combined with a postmodern narrative featuring on-screen text overlays and a narrator who directly addresses the audience, breaking the fourth wall. This stylistic approach contrasts with the series' historical setting, which reconstructs Madrid in 1880 through classical exterior locations, carefully designed interiors, and meticulously crafted nineteenth-century costumes.

The series, which employs a range of clichés typical of the romantic genre, reflects on the condition of women: their independence and male guardianship, social inequality, and the freedom to choose their own future. This is illustrated through the contrast between the two older sisters. One seeks to find a husband and marry, while the other challenges social and family conventions by insisting on pursuing access to university education.

Machos Alfa (2022–present) is screenwriter Laura Caballero's first series for Netflix, written alongside Araceli Álvarez de Sotomayor, Alberto Caballero, and Daniel Deorador. The series reached Netflix's global Top 10 and has French and Italian adaptations. The creative team delivers a realistic comedy that presents everyday situations and relatable characters in order to explore, in a parodic tone, the roles of men and women in contemporary society. It does so through the story of four middle-aged friends who, with varying degrees of sensitivity to ongoing egalitarian social change, confront the loss of privileges they once held within a patriarchal structure. The female characters who accompany them function as narrative catalysts, driving male transformation and propelling the development of the plot.

The series addresses topics that are difficult to explore in light comedy with sufficient depth, such as new masculinities, feminism, sexual harassment, the boundaries of consent, the manosphere, and the misogynistic subculture of incels. Due to its contemporary relevance, *Machos Alfa* has gained public visibility, which has also generated a wide range of criticism. The main reproach is that the series is superficial, lacks an educational dimension, and may even convey sexist ideas by giving

prominence to men who are resistant to gender equality, portraying them as gentle and harmless figures and appealing to audience empathy, even when they behave in patriarchal ways.[18]

A similar narrative proposal, but from a female perspective, is offered by *Valeria* (Netflix), a series conceived and produced by an entirely female team: created by María López Castaño, who freely adapts the novel series *En los zapatos de Valeria* by Elísabet Benavent; written by López Castaño, Aurora Gracià, Almudena Ocaña, and Fernanda Eguiarte; and directed by Inma Torrente and Nely Reguera. *Valeria* follows the sentimental, emotional, and professional experiences of four women in their thirties, with the aim of portraying a generational snapshot. It follows in the tradition of *Sex and the City* (HBO, 1998–2004), featuring a writer-protagonist and a female quartet organised around archetypes: the nonconformist dreamer; the strong and sexual woman; the naïve and insecure one; and the responsible lesbian character. As in this model, particular attention is also paid to urban aesthetics, depicting a summery, radiant, and vibrant Madrid that showcases some of its most picturesque locations: Gran Vía, La Latina, El Retiro Park, Plaza de Oriente, and the Temple of Debod.

The production opts for dramedy as the format to portray the lives of young, aspirational, urban women, and at times directs its dialogue towards feminist statements, generational concerns, and claims regarding the rights of minorities. However, this discourse does not fully align with the actions of its protagonists, who reproduce a range of stereotypical behaviours: anxiety about finding a partner, emotional dependency, and fear of abandonment, among others, which suggests that conservative discourses are socially embedded and also affect female characters.

Arantxa Cuesta is a veteran screenwriter for film and television, with experience in both comedy and drama series. Her latest work, *El Clan Olimpia* (Disney+), conceived with David Muñoz and directed by Gracia Querejeta, Claudia Pedraza, and Violeta Salama, depicts Olimpia's meteoric rise within drug trafficking, from small-scale hashish dealing in a neighbourhood square to international cocaine trafficking involving Colombian cartels and Neapolitan mafias. The series explores female empowerment within patriarchal contexts. The protagonist is a *merchera* woman living within a constrained family environment governed by traditions and a strong sense of family unity. However, Olimpia becomes a "warrior mother," breaks established norms, and enters the criminal underworld in order to support her children following her husband's cancer diagnosis. This decision generates tensions rooted in structural family machismo, where male figures (her father, husband, and brother) deny

[18] For more information: https://elpais.com/smoda/feminismo/2025-02-06/es-machos-alfa-realmente-una-serie-feminista.html

her autonomy on the basis of gender and impose domestic obligations that outweigh even criminal motivations. Nevertheless, through determination, deception, and self-sufficiency, Olimpia finds in illegality the freedom that her clan denies her.

The series is conceived as a narrative about gender equality and the breaking of stereotypes, but it fails to achieve this aim. Although it centres on a woman who rises within organised crime, the script relies on predictable twists and follows well-trodden paths in drug-trafficking narratives: family drama as a narrative trigger, the redemption-seeking character, the use of violence, and the glorification of criminal culture. However, it does not offer any moral reflection on criminal activity or crime itself, nor do ethical doubts or considerations about the social harm caused by the drug trade ever emerge, despite the profits generated from it.

Director and actress Leticia Dolera is another clear example of television authorship. Her drama about motherhood and new couple models, *Vida Perfecta* (2019), earned her the award for Best Series at the Cannes Festival. In *Pubertat* (HBO Max), which she stars in, directs, and co-writes with Almudena Monzú, she broadens the social focus through the story of a sociologist and feminist activist who is the mother of a 13-year-old boy accused, along with his cousin and another friend, of a group sexual assault against a female peer. This event constructs a complex scenario that raises questions about where the line is drawn between sexual exploration and transgression, consent and abuse, and the responsibility of the minor versus that of the adult in charge. It also raises broader issues, such as how a child becomes a sexual offender, how the assault affects the families involved, and how a feminist mother who advocates believing victims should act when her own son is accused. The series also addresses questions related to gender roles, feminism, motherhood and fatherhood, the influence of social media, and the social contamination of the manosphere.

The merit of *Pubertat* lies in addressing a social issue from a space of discussion that does not seek to deliver a verdict, but rather to explore a process without reducing it to a simple good-versus-evil framework. To this end, it alternates between the perspectives of the perpetrators (and their families) and the victim (and her family), allowing the audience to empathise with and understand all those involved. Particularly noteworthy is its realistic portrayal of restorative justice, a procedure focused on highlighting the harm caused by the offence and the needs of all parties involved: the victim, the perpetrators, and the wider community.

The analysed series suggest a broad, diverse, and central representation of women. There is an evident intention to construct new meanings, reflect social trans-

formations, redefine gender roles, and develop more complex female protagonists. However, at the same time, it can be concluded that female authorship does not necessarily entail innovation in the representation of women, the overcoming of traditional stereotypes, or a distinctive narrative creativity. In any case, it is clear that women are contributing increasingly to the creation of television fiction in Spain, although there is still a long way to go before genuine equality is achieved.

Bibliography

Cascajosa, C. (2015). "Mujeres pioneras y creación televisiva en España. Una revisión crítica". En *Transversalidad de género en el audiovisual andaluz*, Núñez, T.; Vera, M. T. y Díaz, R. M. (Editoras), pp. 91-104.

Cascajosa, C. (2010). "Mujeres creadoras de ficción televisiva en España". En *La representación de las mujeres en el cine y la televisión contemporáneos*, Sangro, P. y Plaza, J. F. (Coordinadores), pp. 177-198.

Lacalle, Ch.; Sánchez, M. (2019) Producción de ficción televisiva española a partir de la desregulación: entre la atomización de las empresas y la concentración vertical. *Profesional de la información*, 28(1), 1-9. doi: https://doi.org/10.3145/epi.2019.ene.10

Marcos-Ramos, M. y González de Garay, B. (2021). Gender representation in subscription video on demand Spanish TV Series. *International Journal of Communication*, 15, pp. 581-604.

Mateos-Pérez, J. (2023). "Las series de ficción españolas durante la primera competencia televisiva (1990-1994). El origen de la producción moderna". *Historia y Comunicación Social*, 28(1), pp. 181-189. doi: https://doi.org/10.5209/hics.88633

Palacio, M. (2012). *La televisión durante la Transición española*. Madrid: Cátedra.

Torres, J.L., Castro, A., Díaz, P. Y Pérez, C (2022). Mujeres directivas y creadoras en el audiovisual. Análisis de las series de ficción españolas presentes en los catálogos de Prime Video, Movistar+ y Netflix (2019-21). *Perspectivas de la Comunicación*, 15(2), 217-248. doi: https://doi.org/10.56754/0718-4867.1502.217