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The golden five years of Spanish audiovisual media in VOD: production, content and reception (2020–2024)

El lustro dorado del audiovisual español en VOD: producción, contenido y recepción (2020-2024)

O lustro dourado do audiovisual espanhol em VOD: produção, conteúdo e recepção (2020-2024)

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Abstract

Introduction. This study analyses the Spanish productions for video on demand (VOD) platforms, taking as a time-window the period 2020-2024. It is intended to assess characteristics, patterns and common formulas in the contents in order to establish a know-how of the Spanish production for VOD. **Methodology**. Based on a mixed methodology that combines qualitative analysis with quantitative data, the article analyses a total of 325 audiovisual productions created by the leading platforms in Spain and establishes patterns on forms, styles, production and acceptance of the public. **Results**. The results point to a growing interest in Spanish audiovisual production for VOD. All this is motivated by the demands of the platforms and their audiences, with their own productive characteristics, which mark the new way of making national fiction. **Discussion and conclusions**. The study shows an evolution in the production and distribution strategies of Spanish serialised fiction in VOD. Prime Video and Atresplayer are committed to seriality, while Netflix prioritises high-impact miniseries. Binge-watching fragments narratives, and documentary series gain ground. Quality and differentiation remain key to audience reception.

Keywords:
VOD; Fiction; Television; Production; Series; Binge-watching.

Resumen

Introducción. El presente trabajo analiza las producciones españolas para las plataformas de video on demand (*VOD*), tomando como ventana temporal el periodo 2020-2024. Se pretende conocer características, patrones y fórmulas comunes en los contenidos con la finalidad de establecer un *know how* propio de la producción española para el *VOD*. **Metodología.** Basado en una metodología mixta que combina el análisis cualitativo con los datos cuantitativos, en el artículo se analizan un total de 325 producciones audiovisuales creadas por las plataformas de mayor alcance en España y se establecen patrones sobre formas, estilos, producción y aceptación del público. **Resultados.** Los resultados apuntan a un interés creciente

por la producción audiovisual española para el *VOD*. Todo esto motivado por la demanda de las plataformas y sus audiencias, con unas características productivas propias, que marcan la nueva forma de hacer ficción nacional. **Discusión y conclusiones.** El estudio muestra una evolución en las estrategias de producción y distribución de la ficción seriada española en *VOD*. Prime Video y Atresplayer apuestan por la serialidad, mientras que Netflix prioriza miniseries de alto impacto. El *binge-watching* fragmenta narrativas, y las series documentales ganan espacio. La calidad y diferenciación siguen siendo claves en la recepción del público.

Palabras clave:
VOD; Ficción; Televisión; Producción; Series; Binge-watching.

Resumo

Introdução. Este artigo analisa as produções espanholas para plataformas de vídeo a pedido (*VOD*), tomando como janela temporal o período 2020-2024. O objetivo é identificar caraterísticas, padrões e fórmulas comuns nos conteúdos, a fim de estabelecer um *know how* da produção espanhola para *VOD*. Metodologia. Com base numa metodologia mista que combina análise qualitativa com dados quantitativos, o artigo analisa um total de 325 produções audiovisuais criadas pelas plataformas com maior alcance em Espanha e estabelece padrões sobre formas, estilos, produção e aceitação do público. Resultados. Os resultados apontam para um interesse crescente na produção audiovisual espanhola para *VOD*. Tudo isso é motivado pela demanda das plataformas e de seus públicos, com suas próprias caraterísticas de produção, que marcam a nova forma de fazer ficção nacional. Discussão e conclusões. O estudo mostra uma evolução nas estratégias de produção e distribuição da ficção seriada espanhola em *VOD*. O Prime Video e o Atresplayer apostam na serialidade, enquanto o Netflix dá prioridade às minisséries de grande impacto. O binge-watching fragmenta as narrativas e as séries documentais estão a ganhar espaço. Qualidade e diferenciação continuam a ser fundamentais na receção do público.

Palavras-chave:
VOD; Ficção; Televisão; Produção; Séries; Binge-watching.

1. Introduction

The audiovisual ecosystem has undergone an unprecedented transformation with the consolidation of video on demand, subsequently referred to as VOD, as the dominant distribution model. This change has had a significant impact on the dynamics of content production and consumption, leading to a redefinition of the role of traditional television and the consolidation of new narrative forms adapted to the digital environment (Lotz, 2014; Lobato, 2019). In this context, Spain has emerged as a key player in the production of serialised fiction for platforms, establishing its own identity within the competitive global streaming market.

The relevance of the Spanish case lies in its capacity to generate original content with both local and international impact. Platforms such as Netflix, Prime Video, Max and Movistar + have performed a remarkable job in the production of content in Spain, so the focus on productions of Spanish origin has increased exponentially. These have been integrated into their catalogues as part of their expansion and export strategies to a multitude of countries (Hidalgo-Marí & García-Escrivá, 2024). However, this increase raises a fundamental issue: does a distinct audiovisual canon exist within Spain's original VOD productions? If so, what characteristics would define it? (Hidalgo-Marí *et al.*, 2022).

It is worth noting that a number of studies have examined the impact of VOD on TV production, exploring aspects such as seriality, gender representation and the evolution of audiovisual narratives (Barrios *et al.*, 2021; Forteza-Martínez & Longhi-Heredia, 2021). However, in the context of the lines of research previously raised by authors such as Hidalgo-Marí (2018), it is both necessary and relevant to carry out an analysis examining the convergence between industrial strategies, narrative trends and public reception in a specific context, such as that of Spain.

This article therefore proposes a study of the original productions of the main VOD platforms in Spain between 2020 and 2024, seeking to identify the production and consumption patterns that shape a possible distinct audiovisual canon. By way of an approach combining production analysis and narrative content, the aim is to provide a critical approximation of the role these platforms have played in reshaping the Spanish audiovisual landscape.

2. Theoretical framework

The rise of VOD has brought about a structural change in the audiovisual industry, shifting the traditional linear television model and changing content consumption dynamics (Lotz, 2018). This phenomenon has been reinforced by technological development, the proliferation of connected devices and the growth of streaming as the main form of access to audiovisual services (Lobato, 2019). The globalisation of markets has allowed platforms such as Netflix, Prime Video and Max to expand their international presence, promoting a reconfiguration of the audiovisual market (Chalaby, 2016).

In this context, large media groups have seen the arrival of VOD platforms as an opportunity for exploiting audiovisual content, which has led to the coexistence between traditional television and digital services. This strategy has facilitated the creation of new alliance models, diversifying business opportunities and transforming fiction production in Spain (Cascajosa-Virino, 2018a). In addition, streaming giants have reformulated their strategies, retrieving their own products to distribute them exclusively on their platforms, in order to act as a counterpart to the offering of large suppliers (Komissarov & Sánchez-Narvarte, 2020).

Spain has established itself firmly as a pivotal production centre within the VOD ecosystem, notably distinguished by its substantial volume and diverse range of productions. Recent reports from The European Metadata Group indicate that Spain is among the leading producers of content for streaming in Europe, with notable growth over the last decade (Schneeberger & Fontaine, 2022). In the contemporary context, the Spanish industry has established strategic alliances with prominent digital platforms with the objective of augmenting domestic production and promoting the global dissemination of their content (Pedro-Carañana & Albornoz, 2024). While it is true that the internationalisation of the Spanish product is currently at a high level, it should not be forgotten that audiovisual production for its own market is governed by the logic of cultural proximity (Straubhaar, 1993) and the social theory of localisation (Robertson, 1992), which undoubtedly constitutes an obvious advantage in distributing its own content on platforms operating in Spain.

The period between 2020 and 2024, which constitutes the time-frame for this research, coincides with what could be considered the 'golden five-year period' of Spanish production on VOD platforms. This is supported by several studies carried out by different institutions. For example, according to the *Entertainment and Media Outlook* report 2022-2026, Spain globally has maintained a composite annual growth rate (CAGR) of 7.6 % up to 2026 (PwC, 2022). Similarly, a tightening of the fiction series was detected in 2022 and 2023, with 50 and 53 products respectively (GECA, 2024).

One notable case in the Spanish landscape is Movistar+, which, from a strategic perspective, has integrated production among its main functions, all of which is a reference in terms of acting not only as a distributor but also as a producer (Pérez-Rufí *et al.*, 2020). In this regard, TV companies in Spain started forming alliances to share content on video-on-demand services, but soon faced the difficulties inherent in this long-term strategy (Cascajosa-Viriño, 2018b), as content differentiation ended up becoming a key competitive advantage in this new environment (Doyle, 2015).

The COVID-19 pandemic accelerated pre-existing trends in media consumption habits, driving a massive shift towards the online environment and consolidating streaming as the main option for accessing audiovisual content (Comscore, 2020). It also boosted the rise of phenomena such as binge-watching, and redefined production and distribution models to adapt to the growing demand for digital content (Chaudhari & Damle, 2023). This period also had a significant impact on industry, as declining production and economic uncertainty slowed down the growth of some platforms. One example of this is Netflix, which at the end of 2020 and early 2021 attracted four million new users in the first quarter, fewer than the predicted six million (Roig *et al.*, 2021). At the same time, it eventually led to the consolidation of streaming as a dominant model and favoured experimentation in hybrid formats, leading platforms to diversify their narratives to attract more diverse audiences (Batlle-Beltrán & Mateo-Doll, 2023).

This context has given rise to the so-called "Streaming Wars". In fact, a new chapter is unfolding in which fierce competition between platforms is focused primarily on securing content exclusivity and attracting new subscribers.

This scenario has forced platforms to rethink their content strategies, prioritising certain formats and distribution models (Comscore, 2020).

In the light of this situation, Spanish television fiction has experienced one of its most prolific periods in terms of series exports, with numerous titles being adapted in other markets. This demonstrates the competitiveness of the national production on the global stage (Diego-González & Grandío-Pérez, 2018). This has prompted Spanish producers to adapt to an increasingly globalised ecosystem (Robertson, 1992), where fragmentation of the sector and dispersal of production remain key factors in its development (Hidalgo-Marí & García-Escrivá, 2024). In an era of increasing globalisation, the role of independent producers in consolidating television fiction in Spain is of significant importance. This is particularly relevant in the context of the rise of VOD, which is leading to a structural transformation in the industry, with a growing orientation towards externally financed production (Lacalle & Sánchez-Ares, 2019).

Interest in serialised fiction has grown exponentially, both in the media and in academia. The conversation no longer takes place in specific forums, but rather through social media itself, generating a debate that only serves to enrich the experience (Martínez *et al.*, 2021). On the other hand, this trend has led to an increase in the amount and importance of academic research on Spanish series and miniseries in the twenty-first century (Mateos-Pérez, 2021). In fact, Spain is the leader in scientific publication on VOD in Spanish language, which demonstrates its strategic importance in the academic and cultural spheres (Abad-Pérez & Hidalgo-Marí, 2025; Segado-Boj *et al.*, 2022).

Various studies have addressed the transformation of the television canon in the context of streaming (Hidalgo-Marí *et al.*, 2022), gender representation in serialised fiction (González-de-Garay *et al.*, 2019) and the impact of transnational platforms on the Spanish audiovisual market (García-Leiva & Hernández-Prieto, 2021). This growing interest in scientific production from social sciences is reflected in the work of authors such as Araüna *et al.* (2017) and González-de-Garay *et al.* (2019), who have analysed audiovisual narratives and gender representation on digital platforms. Furthermore, studies such as Clares-Gavilán y Medina-Cambron (2018) and Neira et al. (2024) have enhanced production and distribution strategies in the Spanish context, providing keys

to understanding the reconfiguration of the audiovisual ecosystem in the VOD era. Special mention should be made of the Albornoz *et al*. report (2025), which highlights the importance of Spanish production in international streaming catalogues.

In short, this highlights the transformation of the Spanish audiovisual landscape, where the rise of VOD has reshaped both the production and consumption of serialised fiction. The convergence of technological, economic and social factors has positioned Spain as a key player in the global streaming market, driving a new era of production and distribution. The adaptation of producers to a dynamic environment in such a specific period as 2020-2024, marked by challenges and opportunities, reflects the ability of the Spanish industry to innovate and compete in an increasingly globalised and competitive scenario.

3. Objectives and methodology

This paper aims to describe the landscape of Spanish fiction created for VOD platforms, from both a formal and a content perspective, in order to establish the existence of a characteristic canon of serialised fiction products.

Accordingly, the overall objective of the research is to identify and analyse serialised audiovisual production on the main VOD platforms in Spain between 2020 and 2024, focusing in particular on the existence of specific patterns in each type.

On the basis of this general objective, the following specific objectives arise:

1. Identify the most prevalent genres on each platform.
2. Analyse formats (series, films, documentaries, programmes, etc.), average.
3. duration of episodes, number of seasons and production characteristics.
4. Explore the relationship between platforms and common producers, seeking to identify any regular links.
5. Collect and analyse recurrent trends and patterns, highlighting possible production canons.

6. Detect public reception of these productions through the main audiovisual databases: IMDb and Filmaffinity.

This study adopts a mixed methodology combining qualitative and quantitative approaches to analyse Spanish original products on the main VOD platforms in Spain over the period 2020-2024. Data collection was performed by manual coding of the exclusive content available in the catalogues of eight VOD platforms: Netflix, Max, Disney+, Prime Video, Apple TV, Filmin, Movistar+ and Atresplayer. An *ad hoc* statistical variable table was drawn up, including all the productions detected in the indicated period, and the variables were completed based on the information provided by the platforms themselves. In addition, the collection was supported by other documentary sources, such as IMDb and Filmaffinity, specifically to obtain rating data and to ensure the comprehensivity and reliability of the data.

The analysis covered a total of 325 serialised fiction products, including series, miniseries and documentary series. The sample selection was made on the basis of wholly original productions of Spanish origin, distributed on the platforms under study during the period analysed. Other formats, such as feature films, documentaries and entertainment programmes, were excluded as they were not in line with the study approach focused on serialised narratives. For the purposes of this analysis, a series is understood to be a production structured in multiple episodes and seasons, a miniseries is a self-contained work with a limited number of episodes and no continuity, and a documentary series is a non-fiction product that uses an episodic structure to develop its content.

The study focuses on eight main dimensions, allowing the content to be disaggregated and categorised from different angles, thus providing a complete picture of the trends and characteristics of the period under review. These are as follows:

1. **Platforms:** The distribution of content on each of the eight platforms is analysed.
2. **Formats and Years:** Categorise content according to its format (series, miniseries or documentary series) and launch year.

3. **Genres:** Content is classified by predominant genres, allowing trends to be identified and classified into canonical genres (drama, comedy, thriller, etc.).
4. **Seasons, Episodes and Duration:** The structure of the series is examined in terms of the number of seasons, episodes and average duration of each episode.
5. **Status**: The current status of each production (renewed, finalised or cancelled and pending) is assessed.
6. **Launch**: Determine the type of launch of fiction programmes (simultaneous, staggered and mixed).
7. **Type of Production**: A distinction is made between original productions, distributions and co-productions.
8. **Collaborating Production Companies**: Identify the producers involved in the creation of the products analysed.
9. **Audience ratings:** Audience ratings are collected and analysed from databases such as IMDb and Filmaffinity to gauge the reception of productions.

The quantitative approach makes it possible to identify patterns, frequencies and distributions across the different categories, while the qualitative approach provides a deeper understanding of the trends and evolution of Spanish fiction content in the VOD ecosystem over the study period. As this is a mixed work combining quantitative with qualitative narrative content analysis, the results are expressed in hybrid form. Percentage and numerical data are used to complement and strengthen qualitative findings, seeking to present the findings in the most orderly, understandable and comprehensive way possible. This combination makes it possible not only to capture quantifiable trends but also to enhance the specificities and context of each platform and product. With regard to manual data collection, this was carried out after comparing the data collected and variables and sharing the initial results, in order to validate the clarity of the collection method and ensure consistency between the two researchers involved.

The selection of platforms is based on criteria related to the production of original content, which allows for a more accurate observation of the dynamics of creation in the VOD sector. Platforms such as Netflix, Max, Prime Video,

Disney+, Apple TV, Filmin, Movistar+ and Atresplayer were actively involved in the production of exclusive series, miniseries and documentaries. However, it was decided to exclude Mitele and RTVEplay, as their business model is based mainly on the redistribution of content previously broadcast on their traditional television channels, without a substantial commitment to original productions for their platforms. In addition, their free distribution model or as a complement to a conventional television channel differs significantly from the strategies of the selected platforms.

4. Results

4.1. Formats, genres, years and platforms

When analysing the data on Spanish original serialised fiction across the main platforms in the sample, it can be seen that the predominant format is the series, which accounts for 58.77% of the total with 191 productions. It is followed by the documentary series, with 25.54 % (83 titles). Finally, the miniseries, which attained 15.69 % (51), is a growing format in recent years. Prime Video and Atresplayer are the platforms with the highest percentage of series, accounting for over 68% of their catalogues with 50 and 39 series, respectively (Table 1). Notable examples are *Reina Roja* [*Red Queen*] (Prime Video, 2024-present) and *Nacho* (Atresplayer, 2022). Netflix is close behind, with 63.77% of its production in series format, equivalent to more than 44 titles, including *La chica de nieve* [*The Snow Girl*] (Netflix, 2023-present). In addition, the platform excels in the miniseries format, which accounts for 20.29% of its catalogue with 14 productions, such as *El desorden que dejas* [*The Mess You Leave Behind*] (Netflix, 2020) and *El caso Asunta* [*The Asunta Case*] (Netflix, 2024). On the other hand, the documentary series have a notable presence in Max, Prime Video and Movistar+. In the case of Max, this format represents 47.06 % of its catalogue, with works such as *Salvar al rey* [*Save the King*] (HBO Max, 2022), *Dolores: La Verdad sobre el Caso Wanninkhof* [*Dolores: The Truth About the Wanninkhof Case*] (HBO Max, 2021) and *El hombre sin corazón* [*The Heartless Man*] (HBO Max, 2024).

Table 1. *Total formats of Spanish serialised productions*

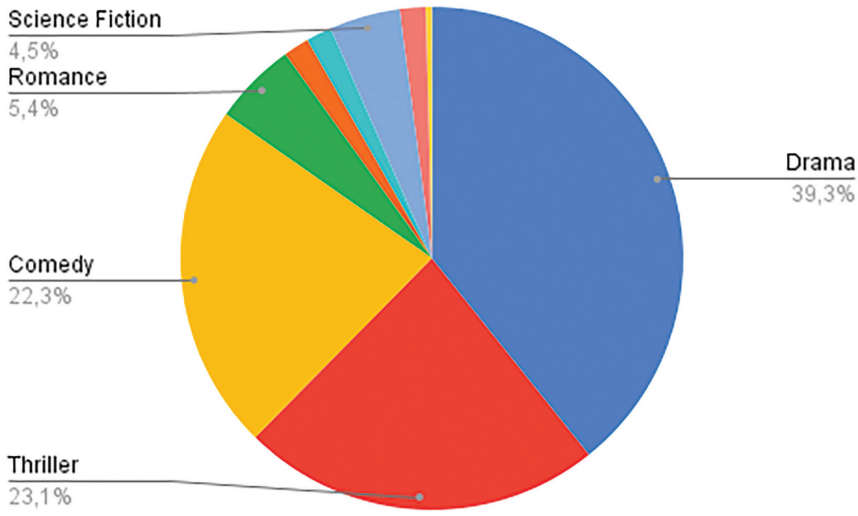
FORMAT	No.	%
Series	191	58.77%
Documentary series	83	25.54%
Miniseries	51	15.69%
TOTAL	**325**	

Source: *authors' own creation.*

In terms of genres in Spanish series and miniseries, drama predominates with 39.3% of the total, equivalent to 95 productions. This is followed by thrillers and comedies, with 23.14% (56 products) and 22.31% (54) respectively. Other genres such as romance and science fiction also have notable proportions (see Figure 1). On analysing the distribution by platform, it can be seen that Netflix is particularly committed to the drama, comedy and thriller genres, a trend reflected in the recent seasons of *Las chicas del cable* [*Cable girls*] (Netflix, 2017-2020) and the *Alta mar* [*High Seas*] (Netflix, 2019). This preference for the three genres listed above is shared by Max, Prime Video and Disney+, as can be seen in titles such as *Patria* (Gabilondo *et al.*, 2020), *Sin huellas* [*No traces*] (Prime Video, 2023) and *Invisible* (Disney+, 2024). More specifically, Movistar+ and Atresplayer show a particular inclination for comedy and thriller, with examples such as *Nasdrovia* (Movistar+, 2020-2022) and *La Ruta* [*The Route*] (Atresplayer, 2022-present). In terms of documentary series, the true crime genre dominates with 35.38 %, followed by productions focusing on cultural topics (26.15 %) and sports (21.54 %). This type of content is particularly prominent in Max, Prime Video and Atresplayer, with representative creations such as *El Caso Sancho* [The Sancho Case] (HBO Max, 2024), *Cómo cazar a un monstruo* [*Hunting a Monster*] (Prime Video, 2024) and *El Palmar de Troya* (Movistar+, 2020).

It is also important to consider the evolution of the platforms' offerings over time. In the case of Prime Video, production grew from 2020 onwards, reaching its peak in 2021 with 18 productions. Similarly, Netflix showed a gradual development, with its peak in 2022, also with 18 productions. Movistar+ maintained a steady pace between 2020 and 2024, largely exceeding the 10 fictions per year. Atresplayer launched 22 in four years, although 2024 registered the lowest number.

Figure 1. *Total number of genres of Spanish series and miniseries*

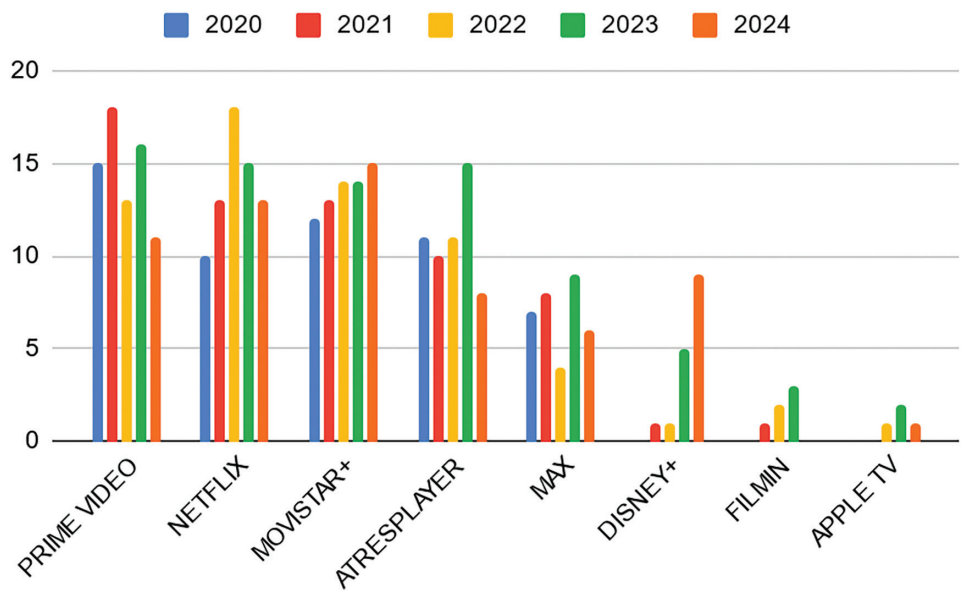


Source*: authors' own creation.*

The cases of Max and Disney+ are paradigmatic, with a notable increase in 2023 and 2024, while Filmin and Apple TV experienced a significant growth in recent years.

The data show that Prime Video leads with 22.46 % of the total, equivalent to 73 series, miniseries and documentary series. It is closely followed by Netflix (21.23 %, 69 cases) and Movistar+ (20.92 %, 68 cases). Examples of titles highlighted on these platforms are *Inés del alma mía* [*Inés of My Soul*] (Prime Video, 2020), *La casa de papel: Berlín* [*Money Heist: Berlin*] (Netflix, 2023) or *Rapa* (Movistar+, 2022-2024). Atresplayer (16.92 %, 55 cases) and Disney+ (10.46 %, 34 cases) have launched high-impact fictions such as *Veneno* (Atresplayer, 2020) and *Nos vemos en otra vida* [*See You in Another Life*] (Disney+, 2024). Finally, with percentages of 1.85% and 1.23%, Filmin and Apple TV represent a significantly smaller percentage of the market. However, in order to understand Spanish fiction production strategies on these platforms, these descriptive data need to be interpreted using a retrospective and evolutionary approach. Prime Video has been the leader in Spanish series since 2020 (Figure 1), beginning with the première of *Pequeñas coincidencias* [*Small Coincidences*] (Prime Video, 2018-2021), a highly successful and long-running series produced by Atresmedia Studios, Medio Limón, and Onza Entertainment. This title began to consolidate Prime Video's position as the leader in the original series (see Figure 2).

Figure 2. *Distribution of Spanish series productions each year by platform*

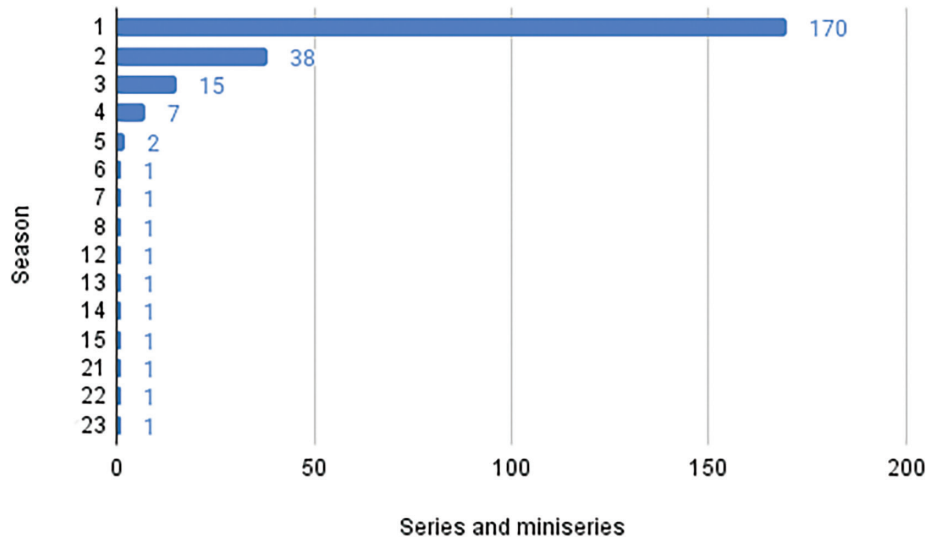


Source: *authors' own creation.*

4.2. Characteristics of productions, status, release and seasonality

Most of the series premièring between 2020 and 2024 are first seasons, accounting for 70.25% of the total, which is equivalent to 170 products. This contrasts sharply with sequels, where second seasons account for 15.70% and third seasons for 6.20%. Additionally, these fiction series would have an average of 8.8 episodes per season, each lasting 39.55 minutes. The first seasons of series and miniseries predominate on the platforms: Netflix has 68.97% (40 programmes), Max has 77.78% (14), Movistar+ has 64.58% (31) and Atresplayer has 86.05% (37). Disney+ and Apple TV+ are wholly dominated by first seasons, accounting for 100% of their respective catalogues (13 and 3 programmes, respectively). However, Prime Video exhibits a greater diversity in terms of seasons: first seasons account for 49.06% (26 programmes), second seasons for 18.87% (10) and third seasons for 13.21% (7). This is reflected in programmes with multiple seasons, such as *El Cid* (Prime Video, 2020-2021), *El internado: Las Cumbres* [*The Boarding School: Las Cumbres*]

Figure 3. *Total episodes per season of Spanish series and miniseries*

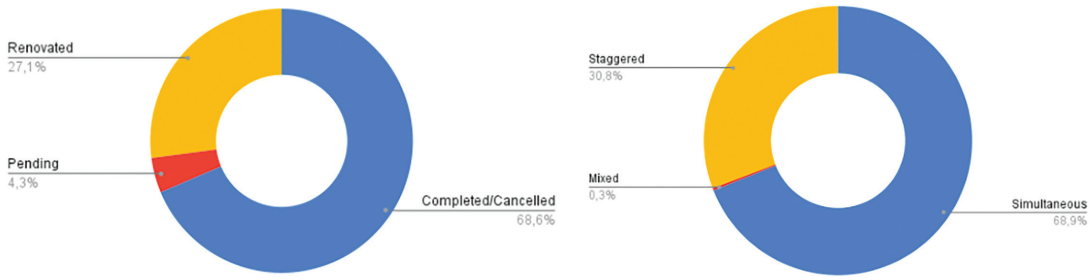


Source: *authors' own creation.*

(Prime Video, 2021-2023) and *Pequeñas coincidencias* [Small Coincidences] (Prime Video, 2018-2021) (see Figure 3).

In the context of documentaries, initial seasons predominate, accounting for 81.93% of the sample (68 products). This is followed by second seasons, which constitute 10.84% of the sample (9 products). With regard to the number of documentary series released on various platforms, it is apparent that Max and Prime Video have the highest number. On Max, the initial seasons comprise 93.75% of the total (15 documentary series), whereas on Prime Video, they account for 80% (16 documentary series). Movistar+ is a notable case in point, as it is committed to continuing this format with 75% first seasons (15), 15% second seasons (3) and 2% third and fourth seasons (2). This tendency is exemplified by the works *Luz en la oscuridad* [*Light in the Darkness*] (Movistar+, 2023-present) and *Informe+* [*Report+*] (Movistar+, 2021-present). This development ultimately serves to reinforce the strategic approach of these platforms, which is to invest in new formats and content during their initial stages, with a view to consolidating their catalogue by offering a varied and renewed selection (see Figure 4).

Figure 4. *Total status and release of Spanish series productions on platforms*



Source: *authors' own creation.*

Over the five-year period analysed, 68.6% of productions (223 titles) were cancelled, while 27.1% (88 titles) were renewed. The future of the remaining 4.3% (14 titles) is still pending. Max and Disney+ have high percentages of cancelled or completed fiction series, exceeding 80%, while renewal rates do not achieve 15%. By contrast, Prime Video and Netflix exhibit a different trend, with fewer than 70% of their productions completed. These platforms are the most committed to continuity, with rates of 35.62% and 26.08%, respectively. Series such as *Operación Marea Negra* [*Silent Cargo*] (Prime Video, 2022), *Élite* (Netflix, 2018-2024), and *Valeria* (Netflix, 2020-2025) follow this pattern. As for the Spanish platforms, Filmin finished all its works, while Movistar+ and Atresplayer finished 72.06% and 56.36% of their products, respectively, renewing 26.47% and 34.55%. Notable examples of series that have been renewed include *Cardo* (Atresplayer, 2021-2023) and *La novia gitana* [*The Gypsy Bride*] (Atresplayer, 2022).

In terms of release, the majority of productions were released simultaneously (68.9%, or 224 products), followed by the more conventional television strategy of staggered release (30.8%, or 100 products). A residual 0.3% (1 product) were mixed releases, following a combination of both strategies. Major platforms such as Netflix, Max, Prime Video, Disney+, Apple TV and Filmin mostly commit to full premières. Netflix achieves 98.55% simultaneous premières, while Prime Video achieves 84.93%. However, Max employs a hybrid approach, releasing 20.59% (7 products) of titles on a staggered basis, including *Patria* (HBO Max, 2020) and *30 monedas* [*30 Coins*] (HBO Max, 2020-2023). The opposite trend can be seen on Movistar+ and, in particular, Atresplayer. Movistar+ strikes a balance between

the two models, with 58.82% simultaneous releases (40 products) and 41.17% staggered releases (28 products). In recent years, however, it has increased the weekly release of series and miniseries, such as *Querer* [*To love*] (Movistar+, 2024) and *Los años nuevos* [*The New Years*] (Movistar+, 2024). In contrast, Atresplayer's strategy focuses on staggered premières, a practice inherited from its television counterpart.

A balanced distribution is evident in the premières of fiction (Table 2), with the fourth quarter (October-December) accounting for the highest number of releases (28.62%). The first and second quarters are closely followed by the third quarter, which demonstrates the least activity (20.93%). It is apparent that Netflix primarily releases new content during the summer months, while Max, Prime Video and Disney+ focus their releases on the fourth quarter. In the context of Spanish platforms, Movistar+ demonstrates a preference for the initial six months of the year, while Atresplayer exhibits a balanced distribution strategy.

Table 2. *Release dates of Spanish productions on streaming platforms*

Quarter	2020	2021	2022	2023	2024	Total	Percentage
1.	11	24	15	20	15	85	26.15%
2.	12	12	14	25	23	86	26.46%
3.	14	11	14	13	9	61	18.77%
4.	18	17	21	21	16	93	28.62%

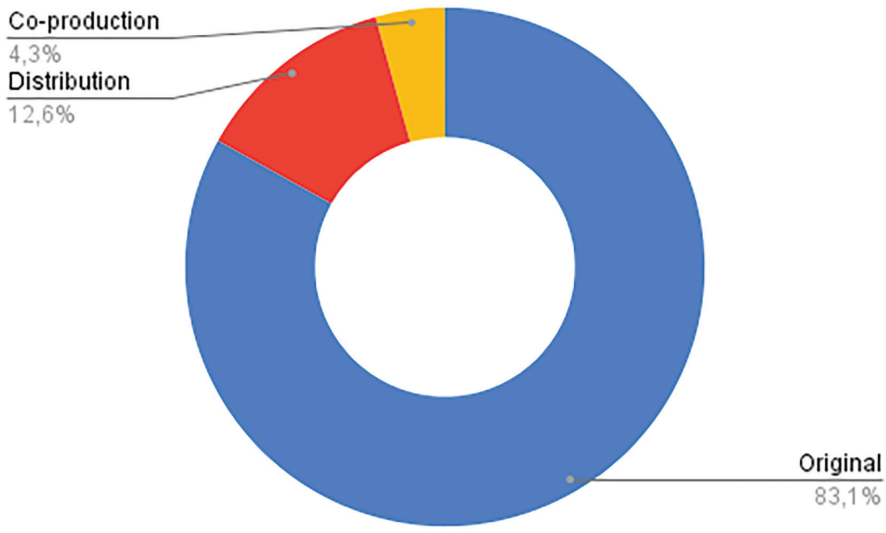
Source*: authors' own creation.*

4.3. Type of production and producers

The productions of the aforementioned platforms are categorised as follows: in-house production, co-production and distribution. In-house production refers to projects financed and developed by the platform, which owns the exclusive rights. Co-production is defined as a collaborative process involving the joint investment and distribution of media content by multiple entities, including independent production companies and television networks. This collaborative approach entails the sharing of both financial investments and intellectual property rights.

Finally, distribution of the subject matter is constrained by the acquisition of rights to broadcast or market content produced by third parties (see Figure 5). A significant proportion of the productions (270) are original to the platforms, indicating a commitment to proprietary content. 83.1% of productions (270) are original to the platforms, reflecting their commitment to their own content. Distribution accounts for 12.62% (41), while co-production accounts for 4.3% (14). Netflix, Apple TV, Movistar+ and Atresplayer are fully committed to originals (100% of their catalogues), while Disney+ achieves 93.75% (15). Max (61.77%, 21) and Prime Video (46.58%, 34) show a greater inclination towards originals, although they combine this with distribution and co-production. Filmin maintains a balanced portfolio, with 66.6% of its content being original productions (4) and the remaining 33.3% consisting of distribution (2). This inclination towards proprietary content enables platforms to distinguish themselves, exercise control over rights, and attract subscribers in a highly competitive market.

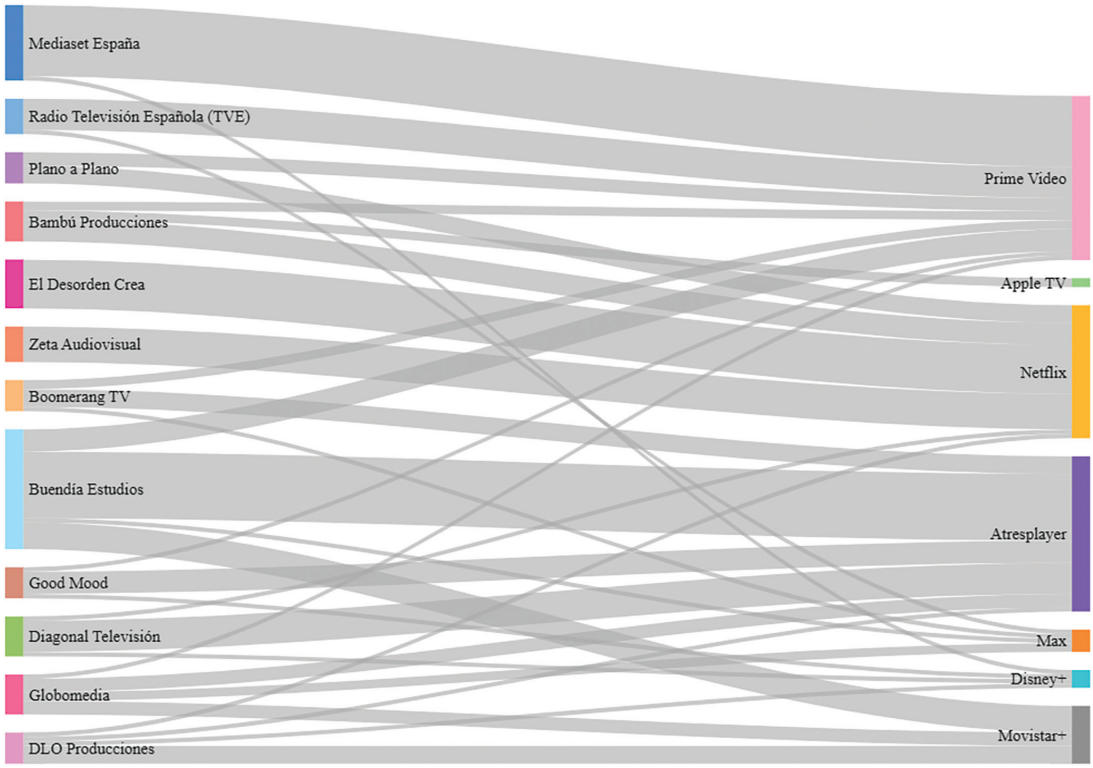
Figure 5. *Total Spanish serialised production on streaming platforms*



Source: *authors' own creation.*

The most prominent production companies in the creation of Spanish fiction series for the main VOD platforms in the 2020-2024 period reflect a diversity of collaborations and strategies (see Figure 6). A total of 67 production companies

Figure 6. *Production companies with the most collaborations with platforms*

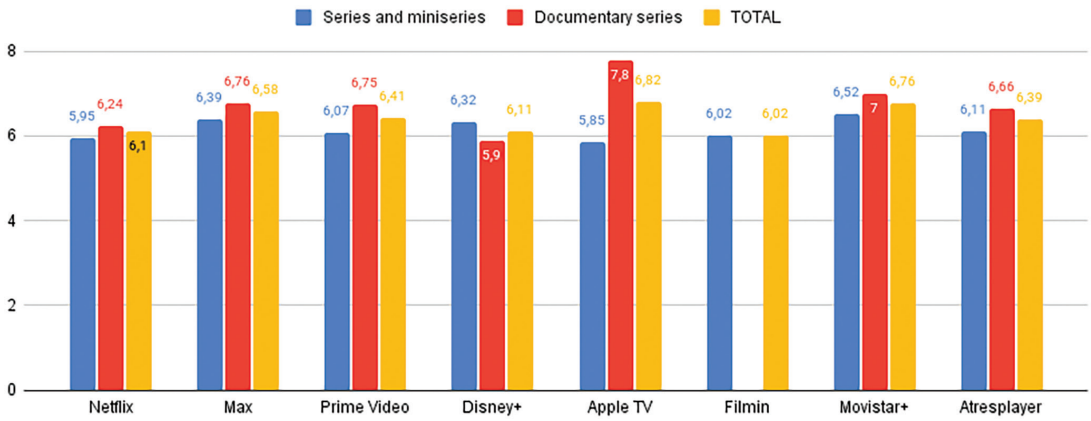


Source: *authors' own creation.*

have been identified, with Buendía Estudios leading the way with 28 productions distributed mainly among Atresplayer (15), Movistar+ (6), Prime Video (5) and Max (1), thus consolidating its position as a key partner in national production. Examples of its work include *La cocinera de Castamar* [*The Cook of Castamar*] (Atresplayer, 2021), *Poquita fe* [*Little Faith*] (Movistar+, 2023-present) and *El internado: Las Cumbres* [*The Boarding School: Las Cumbres*] (Prime Video, 2021-2023). Mediaset España, with 17 collaborations, has focused its production on Prime Video (16 of them), with titles such as *Madres*: *Amor y vida [Mothers: Love and Life*] (Prime Video, 2020-2022) and *La que se avecina* [*What's Coming*] (Prime Video, 2007-present). El Desorden Crea has produced 11 series exclusively for Netflix, including *El desorden que dejas* [*The Mess You Leave Behind*] (Netflix, 2020) and Élite (Netflix, 2018-2024).

On the other hand, Diagonal Televisión and Globomedia have each engaged in nine collaborative endeavours with various platforms, with Atresplayer being particularly noteworthy for its ten productions, including *Luimelia* (Atresplayer, 2020-2021) and *Dos años y un día* [*Two Years and a Day*] (Atresplayer, 2022). Finally, Zeta Audiovisual, Bambú Producciones and Radio Televisión Española (RTVE) have eight collaborations each (see Figure 7). The first two have worked extensively with Netflix, with highly successful productions such as *Las chicas del cable* [*Cable Girls*] (Netflix, 2017-2020). RTVE and Prime Video have a notable collaborative relationship, having launched the fiction series *Inés del alma mía* [*Inés of My Soul*] (Prime Video, 2020) and *Sin límites* [*Boundless*] (Prime Video, 2022).

Figure 7. *Ratings of productions in the main databases*



Source: *authors' own creation.*

4.4. Reception and evaluation of productions

The ratings of productions in the main databases, IMDb and Filmaffinity, provide an insight into the public's perception of the different formats available on VOD platforms over the period 2020-2024. The mean average for series and miniseries is 6.15, for documentary series it is 6.73, and for both combined it is 6.44. An analysis of the ratings across various platforms reveals significant variations. Apple TV achieved an overall average score of 6.82, with *Real Madrid: Hasta el final* [*Real Madrid: Until*

the End] (Apple TV, 2023) receiving the highest rating of 7.8. Movistar+ follows with 6.72, with *Antidisturbios* [*Riot Police*] (Movistar+, 2020) (8.0) and *Querer* [*To Love*] (Movistar+, 2024) (8.0) being of particular note. Max's score is 6.32, with *Patria* (HBO Max, 2020) (8.05) being the most significant title. Atresplayer and Disney+ also show positive ratings, with averages of 6.42 and 6.11 respectively, with *Veneno* (Atresplayer, 2020) (8.05) and *Déjate ver* [*Let Yourself Be Seen*] (Atresplayer, 2023) (7.55) in the case of Atresplayer, and *Yo, adicto* [*I, Addict*] (Disney+, 2024) (7.75) and *Nos vemos en otra vida* [*See You in Another Life*] (Disney+, 2024) (7.4) on Disney+. With regard to the platforms exhibiting the lowest ratings, Prime Video has an average of 5.95, although it is notable for its high ranking in the documentary genre, as evidenced by *El desafío: ETA* [*The Challenge: ETA*] (Prime Video, 2020) (7.95) and *GEO: Más allá del límite* [*Spain's Elite Police: Beyond Limits*] (Prime Video, 2021) (7.75). Filmin recorded an average rating of 5.97, with *Selftape* (Filmin, 2023) (7.0) being the only film to receive a higher score. The lowest-rated titles on Netflix, with an average score of 5.81, include *Las de la última fila* [*The Girls at the Back*] (Netflix, 2022) (7.3), *El inocente* [*The Innocent*] (Netflix, 2021) (7.25), and *Smiley* (Netflix, 2022) (7.2).

The data suggest that there is a divergence in perceptions among the various platforms, with Apple TV and Movistar+ being notable for the higher ratings they receive for their content. In contrast, Netflix and Prime Video, despite their substantial production volume, have a lower average rating. An analysis of the most notable works reveals a preponderance of themes centred on thrillers, social drama and investigative documentaries. In particular, productions related to ETA and the Basque conflict predominate, such as *Patria* (HBO Max, 2020) and *El desafío: ETA* [*The Challenge: ETA*] (Prime Video, 2020), reflecting public interest in historical memory and notable events in Spain. The genre of social drama has maintained its relevance, as evidenced by the release of prominent titles such as *Veneno* (Atresplayer, 2020), Antidisturbios [*Riot Police*] (Movistar+, 2020), and Yo, adicto [I, Addict] (Disney+, 2024). Concurrently, there has been a discernible rise in the prominence of sports and investigative journalism, as exemplified by *Real Madrid: Hasta el final* [*Real Madrid: Until the End*] (Apple TV, 2023) and *GEO: Más allá del límite* [*Spain's Elite Police: Beyond Limits*] (Prime Video, 2021). Notwithstanding the presence of genres such as comedy and romance, as evidenced by titles including *Smiley* (Netflix, 2022) and *Déjate ver* [*Let Yourself Be Seen*] (Atresplayer, 2023), audiences express a predilection for narratives that are characterised by their intensity, social impact and the capacity to provoke reflection.

5. Discussion and conclusions

Over the last five years, serialised fiction on VOD in Spain has undergone a significant evolution. Although the period analysed is limited in historical terms, emerging patterns can be detected that enable us to understand the dynamics that are defining a new way of producing and consuming fiction.

An analysis of the predominant formats on Spanish VOD platforms reveals that series are the most popular, followed at a considerable distance by documentary series and miniseries. With regard to genres, drama is the most popular, followed by thrillers and comedies. Within the domain of documentary series, true crime has firmly established itself as the most prolific subgenre. Furthermore, since 2020, there has been an incremental increase in the production of fiction series, which attained its highest point in 2023 with 79 premières. This is a clear indication of the evolution that has taken place over the last five years. With regard to distribution by platform, Prime Video is in the lead with 73 productions, followed closely by Netflix and Movistar+. These data corroborate the thesis of Cascajosa-Virino (2018b) and the data from the GECA report (2024) itself, which confirmed the upward trend in the production of serialised fiction in Spain.

In the context of on-demand consumption, it is worth noting the variations in the continuity strategies employed by each platform. Atresplayer and Max stand out for their emphasis on initial seasons, while Prime Video and Netflix are distinguished by their dedication to continuity. Prime Video, in particular, prioritises audience loyalty by means of extensive, sustainable narratives. In contrast, Netflix leans towards miniseries, a format that encourages rapid consumption and allows it to constantly attract new viewers. A similar trend is evident in the case of documentary series, with most comprising initial seasons, with Max, Prime Video and Movistar+ identified as the primary driving forces.

Nevertheless, it has been demonstrated that launch strategies also reflect different approaches. Whilst prominent platforms such as Netflix, Prime Video, Disney+, Apple TV and Filmin predominantly adopt the strategy of releasing entire seasons simultaneously, Max and Movistar+ adopt a methodology analogous to linear television, whereby content is made available in a staggered manner. Atresplayer, conversely, adopts an approach oriented towards episodic broadcasting, a reflection of its television heritage. In this regard, it is notable that Movistar+, in its dual ca-

pacity as distributor and producer (Pérez-Rufí *et al.*, 2020), employs a distinctive approach to the dissemination of its own content, deviating from the prevailing paradigm of binge-watching. This approach, despite its apparent incongruity, as evidenced by reception data, positions Movistar+ as one of the most highly rated platforms in terms of its original productions.

It is important to note that the phenomenon of binge-watching continues to define consumption dynamics, with a clear preference for simultaneous releases that allow viewers to consume entire seasons in a short period of time. However, this model has resulted in narrative fragmentation, whereby mass production takes precedence over the longevity of stories. This response is indicative of the necessity for platforms to maintain a constantly updated catalogue, a circumstance that has resulted in an environment in which many fiction programmes fail to establish themselves. This phenomenon was already evident in research on the product-offering in the early years of VOD (Hidalgo-Marí *et al.*, 2022).

A salient finding is the mounting commitment to serialised fiction conceived expressly for VOD, an imperative strategy for differentiation in a highly competitive market. In this context, partnerships with production companies are emerging as a crucial factor. Examples of such collaborations include those of Buendía Estudios, Mediaset España, Bambú Producciones and El Desorden Crea and, in particular, the former's collaboration with multiple platforms. These examples illustrate how such partnerships drive diversification of supply and confirm production companies as key players in the streaming era. The significance of these collaborations becomes apparent when one considers the current dynamics of the Spanish audiovisual market. Furthermore, it underscores the capacity of Spanish production companies to adapt to the fragmentation of an increasingly fragmented audiovisual ecosystem (Hidalgo-Marí & García-Escrivá, 2024), although a reduction in atomisation, as previously detected in other studies (Lacalle & Sánchez-Ares, 2019), has been observed, attributed to production-distribution alliances.

With regard to audience reception, the data indicate substantial disparities between platforms. Apple TV and Movistar+ have been found to offer content of the highest rating, while Netflix and Prime Video, despite their high production volume, have a lower average rating. Furthermore, analysis of the highest-rated fiction programmes has revealed a broad spectrum of genres, ranging from thrillers to social dramas and investigative documentaries. There is a perceived interest in exploring human

complexity, generating narrative tension and reflecting on society, all from different perspectives and with different objectives. This thematic inclination correlates with the volume of production that accentuates the dramatic genre over comedy, thereby corroborating the findings of Hidalgo-Marí (2018), which highlighted the ease of exporting family drama and dramedy over the cultural complexities of comedy.

In summary, the Spanish series industry is currently experiencing a period of transformation, characterised by a simultaneous commitment to continuity and a pursuit of more concise, impactful formats. In the context of audience reception, factors such as production volume, quality, and differentiation are of crucial importance. However, the market faces significant challenges, including catalogue saturation, volatile consumer trends, audience fragmentation, coexistence with advertising, and the rise of AVOD models. As the sector evolves, it will be crucial to observe how platforms balance mass production with the need to build viewer loyalty, optimising the profitability of their content. In this context, the ability to innovate and adapt will be decisive for the success of platforms, production companies, and creators. These entities will have to find new ways to tell stories that connect with an ever-changing audience.

Author contributions

Jorge Abad-Pérez: Conceptualization, Methodology, Formal analysis, Data curation, Investigation, Project administration, Resources, Software, Supervision, Validation, Visualization, Writing-original draft, Writing-review & editing. **Tatiana Hidalgo-Marí:** Formal analysis, Investigation, Methodology, Project administration, Resources, Software, Supervision, Validation, Visualization, Writing-review & editing, Funding acquisition. All authors have read and accepted the published version of the manuscript.

Conflicts of interest

The authors declare that they have no conflict of interest.

Data availability

The dataset for the analysis of Spanish productions for video-on-demand (VOD) platforms (2020-2024) [Dataset]. https://zenodo.org/records/18391774

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Note: The link to the data availability page contains all the information regarding the narrative references to the audiovisual productions mentioned in the text.