

Transnational Subscription Video-On-Demand Services in Spain: Promotion and Advertising of Audiovisual Works

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This article explores transnational subscription video-on-demand (SVOD) services in Spain, focusing on the promotion and advertising of audiovisual works by five services: Netflix, Prime Video, Disney+, HBO Max, and Apple TV+. Based on the fieldwork conducted, this study aims to provide quantitative and qualitative insight into the most promoted audiovisual works in the Spanish market in 2021 and 2022. Three variables are considered to assess the sample of the most promoted audiovisual works: (1) place of production (international or national origin of works), (2) format of audiovisual works (series, films, documentaries, or programs), and (3) the strategic use of out-of-home advertising of audiovisual works. The article explores dialogues and tensions between the local and the global, trends in audiovisual production and promotion, and the presence of advertising in media, social media, and public spaces.

Keywords: subscription video-on-demand services, audiovisual industry, Spain, promotion, advertising

The contemporary audiovisual media landscape is marked by the global rise and popularity of SVOD services. U.S.-based companies such as Netflix, Warner Bros. Discovery, Amazon, The Walt Disney Co., and Apple, among others, have become key rising players operating in distinct markets and audiences and playing an increasing role in contemporary popular culture. Accordingly, their expansive global mission has been strategically accompanied by the promotion of their brands and audiovisual content associated with different nations, identities, and languages. Amid intense competition in audiovisual industries, the popularization of SVOD services channels complex convergence processes between the television and film industries. Moreover, the importance of promotion and advertising has been reinforced because of the pressing need for visibility and distinction in the public sphere.

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Framed within a larger, five-year research project, this article explores the presence of transnational SVOD services in the Spanish audiovisual market by focusing on the promotion and advertising strategies of five U.S. services: Netflix, Prime Video, Disney+, HBO Max, and Apple TV+. Within a global framework, these companies cater to distinct markets and audiences by digitally distributing vast amounts of audiovisual content (series, films, documentaries, reality shows, animation . . .). For instance, Netflix is available in more than 190 countries, surpassed only by Prime Video, which is present in more than 200 countries and territories (Netflix, n.d.; Video Central Support, n.d.). Involved in so-called streaming wars, these companies have different origins and business models. Starting with Netflix, which arrived in Spain in 2015, these new players have been firmly established in recent years, highlighting the need to examine this complex process.

Within Europe, the case of Spain is particularly significant for two main reasons. First, Spain has become a regional center for global SVOD investment. In 2019, Netflix opened its first European production hub in Madrid. Stimulated by the global popularity of Spanish series, Netflix cofounder and CEO Reed Hastings declared, "Our aim is to be part of the Spanish creative ecosystem. We are investing for the long term, we are here to stay and to participate" (Business, 2019, para. 4). Netflix's strategic investment in Spain reflects its commitment to producing original content throughout Europe, highlighting the global potential of Spanish-language content to break national and cultural barriers, particularly across Latin America and the United States.

More generally, as indicated by the European Audiovisual Observatory (2024), "in 2022, most TV fiction commissioned by global streamers [in Europe] was produced in Spain and the United Kingdom" (p. 18). The concentration of global SVOD spending in Europe also points toward the United Kingdom and Spain, which "accounted together for 55% of global streamer spending on original European content" (European Audiovisual Observatory, 2024, p. 32). Furthermore, "the share of global streamers in original content spending is particularly high in Spain (over 50%) and, to a lesser extent, in the United Kingdom, Italy, Denmark and Sweden" (European Audiovisual Observatory, 2024, p. 32). These factors illustrate the establishment of Spain as an important market for SVOD.

Second, the Spanish audiovisual industry and the Spanish government have welcomed the interest of global streamers and supported it with further investments. Between 2021 and 2025, the Spanish government will invest 1.603 million euros to develop "Spain: Audiovisual Hub of Europe," a strategic plan to boost the audiovisual sector. By boosting national audiovisual production and attracting investment and economic activity, the goal is to increase audiovisual production in Spain by 30%. On a visit to Los Angeles, Spanish president Pedro Sánchez referred to Spain as "Europe's Hollywood" (Europa Press Nacional, 2021).

Based on the fieldwork undertaken throughout 2021 and 2022, this article aims to provide both quantitative and qualitative insight into the most promoted SVOD audiovisual works in the Spanish market. Specifically, it addresses the following questions: Which titles are the most promoted SVOD works? Which SVOD services promote more works? What are the national origins of the most promoted SVOD works? What format is being promoted most? What media is being used to advertise and promote SVOD works? And is there a balance in terms of content diversity? Along with the observed services, three variables are considered to assess the sample of the most promoted audiovisual works in Spain: (1) place of production,

according to the international or national origins of works; (2) the format of audiovisual works, based on the distinction between series, films, documentaries, and programs; and (3) the strategic use and value of out-of-home advertising of audiovisual works. This article explores dialogues and tensions between local and global, audiovisual production and promotion trends, and advertising presence in media, social media, and public spaces.

One of the main challenges of studying these SVOD service operators lies in their opacity. These companies are usually unwilling to share information about their activities and impose strict confidentiality clauses on their agents. To overcome this difficulty, we developed the research based on complementary perspectives and *ad hoc* research method tools. These include documentary and bibliographic review and analysis, critical observation of the selected services, quantitative analysis, mapping, and discourse analysis. This article reflects on the mapping of works developed, and it relies on an *ad hoc* methodological tool, applied since January 2021. It provides insight into audiovisual works and advertising campaigns and reveals how the SVOD promotional territory permeates different media dimensions, including out-of-home (OOH) advertising, media agenda and conversation, and social media.

First, we discuss the theoretical and methodological framework. The following section reveals the quantitative results of the mapping conducted over two years. Its geographic basis has been in Madrid, as the researchers live and work in the Spanish capital, yet it has been conducted in dialogue with other national and international realities. Data are structured around the three main variables: the place of production, the format of audiovisual works, and the presence of OOH advertising of audiovisual works. Finally, we elaborate conclusions about transnational SVOD services in Spain and the performances and identities of each service.

Theoretical and Methodological Framework

The selection of these five SVOD services—Netflix, HBO Max, Prime Video, Apple TV+, and Disney+—is justified by the fact that the first three had the most subscribers in Spain in this market segment, while the last two followed them in accessing the market. According to the first 2023 TV-OTT barometer by the Spanish consulting company Barlovento Comunicación (2023), 81.2% of Spaniards have access to pay TV (30.3 million people). The OTT ranking indicates the following data on the reach of SVOD services: Netflix, 52.6%; Prime Video, 49.3%; Disney+, 28%; HBO Max, 26.4%; and Apple TV+, 3.3%. The national service Movistar+ plays an important role and is situated in fifth place (18.2%).

This study analyzes transnational SVOD services in Spain from an audiovisual diversity perspective rooted in the political economy of communication (Albornoz & García Leiva, 2019, 2022; Napoli, 1999). The conceptual discussion about the diversity of/in the audiovisual industry depends on multiple factors. To assess this complex relationship, we consider ownership, content, and audiences:

- a) The production, distribution, promotion, and exhibition/broadcast of contents are not concentrated into a reduced number of stakeholders that, additionally, can be characterized as evidencing differences in terms of ownership, size, and geographical origin.

b) The contents show differences in variety, balance, and disparity in relation to values, identities, and looks. These reflect the multiple groups that coexist in a given society and the cosmogonies and expressions of foreign cultures.

c) Citizens and social groups should have access to a wide range of choice contents and should even be able to create and disseminate them (Albornoz & García Leiva, 2019, p. xxx).

Focusing on the promotional presence of transnational SVOD services in Spain, this article addresses the first two components of diversity (Napoli, 1999): source diversity, as it relates to ownership by observing U.S. companies performing in Spain; and content diversity, as it delves into the place of production and format of the works. The source-content relationship is explored through the examination of SVOD services and advertised contents, which engage with audiences through different media outlets.

This article seeks to contribute to studies about audiovisual industries and globalization, particularly to transnational SVOD studies in the Global South and the Spanish-speaking world (Albornoz, García Leiva, & Gallo, 2023; Bouquillion, Ithurbide, & Matterlart, 2024; Straubhaar, Santillana, Higgins Joyce, & Duarte, 2021). The underlying concern from the political economy perspective is to deepen understanding of how power relations shape the production, distribution, and consumption of media commodities. We consider two paradigms to interrogate the obtained results: media and cultural imperialism (Gómez García & Birkinbine, 2018; Salsabila, 2021), a dominant perspective within the political economy of communication that highlights cultural domination and the homogenizing aspects of globalization; and glocalization, a concept that questions univocal readings of globalization by stressing its heterogeneous aspects and the blend between the global and the local (Pedro, 2022b; Robertson, 1994).

In terms of methodology, an analysis template was developed to identify the most promoted SVOD works in the Spanish market. We monitored new releases and advertising campaigns to identify the main audiovisual works promoted in Spain. The mapping of works is based on three selection criteria: (1) significant public presence in the everyday environment of citizens through OOH, (2) prominent presence in specialized and general media, and (3) prominent presence in social media and digital environments. The empirical study of OOH advertising stems from concerns about the complex relationships among SVOD, media, the public space and sphere, culture, and the imaginary. This process was based on a critical contextualization of previous OOH advertising by Netflix in Spain—for instance, the campaigns for *Narcos* (Brancato, Bernard, & Miro, 2015–2017) and *Sex Education* (Nunn, 2019–2023) in Madrid, which had a notable impact on the public sphere and on subsequent campaigns.

When investigating the transformations caused by the popularization of audiovisual platforms, we understand that advertising is key in their mission to expand and build loyalty among global audiences. The hypothesis is that SVOD works promoted through OOH advertising (the first selection criteria) constitute a privileged selection of the most promoted works. In the context of hyper-exposure to multiple texts, SVOD operators use OOH advertising as a fundamental strategic tool to proclaim their presence in different

territories. They consolidate their public presence in different cities and countries by forcefully erupting into predominantly urban landscapes, as well as in social and media conversations. Through the mapping of the most promoted SVOD works, this research allows for the identification of paradigmatic examples of the advertising presence in contemporary cities.

About the observation of OOH advertising, the focus was on Madrid because of the greater possibility of observation—being the authors' city of residence and research. Additionally, because it is the Spanish capital, there is more news about SVOD providers' actions in this territory. Nonetheless, based on their coverage in media and social media, other cities such as Barcelona, Bilbao, Valencia, and Cuenca were also considered. Furthermore, the examination of different cases revealed transnational connections with other cities around the world where OOH advertising might be similarly present. For instance, the analysis of *Sky Rojo* (Martínez Lobato & Pina, 2021–2023) and *The Falcon and the Winter Soldier* (Spellman, 2021) allowed us to identify its OOH advertising in New York, Los Angeles, Las Vegas, Buenos Aires, Mexico City, London, Amsterdam, Leiden, Eindhoven, Zurich, Rome, Milan, Marseille, and Melbourne (Pedro & Camáñez García, 2023).

Significant presence in specialized and/or mainstream media, the second selection criterion, speaks about presence in the public sphere and in daily conversation. This mapping of works is based on a daily review of well-known national media (particularly newspapers) and of the Google News feed, which includes different specialized media. Presence in the media may relate to the themes of the works, participants in the project, sociocultural and political movements, and/or audience ratings or awards. It also relates to two other selection criteria: the presence of work in OOH advertising and/or in social media. On one hand, "out-of-home advertising may be an urban spectacle intended for mediatization and celebration in media and networks" (Pedro & Camáñez García, 2023, p. 321). On the other hand, digital media often amplify trends and conversations that emerge in social media outlets.

Finally, the third selection criteria—significant presence in social media and digital platforms—relates to SVOD's online accounts and to how these brands and their works generate engagement and fandom in the digital sphere. Besides their promotional activities, undertaken through multiple daily posts on social media, SVOD services also benefit from the promotional actions of active audiences, which include the online sharing of significant OOH advertising, media controversies, and specific social media content. In the digital public sphere, subject to the logic of quantification and virality, this presence and "noise" are desirable to obtain further visibility and resonance. Overall, the promotion of audiovisual work may circulate through all the observed dimensions: OOH advertising, media, and social media.

Methodologically, we employ multimedia documentation and cartography as complementary tools. Documentation is based on the daily review of journalistic and academic texts about SVOD services and on the monitoring of the social media profiles of SVOD services on Facebook, X, and Instagram. The authors follow the social media accounts of the observed services, and they photograph or screen capture the advertisements of new releases, considering the services, dates, and locations. They count on the collaboration of all members of the broader project who share images, photographs, and news of SVOD

advertisements and releases within a WhatsApp group dedicated to the project. This information is then used to map the works in the *ad hoc* methodological tool.

We explore the object of study based on a metaphor about territory, understanding that streamers shape and deploy their own dynamic territories within which they engage with citizens-consumers. The SVOD territory includes an online dimension, with catalogs as its main manifestation, and an offline dimension, where OOH advertising symbolizes the public presence of SVOD services. Cartography is employed offline and online, and tables or maps are created to address the vast and dynamic SVOD territory. Through its ethnographic inspiration and empirical approach, this theoretical and methodological perspective explores the links among communication, sociology, and anthropology. Following Martín-Barbero (2002), communication studies involve "an artisan exercise of cartography" (p. 10). Martín-Barbero (2002) argues that cartography can "construct images of relations and interrelations" and "open up social sciences by following and overflowing" previously traced paths (p. 14). Thus, maps allow us to navigate the complex SVOD territory in a specific market.

We acknowledge a double conception of maps. On one hand, they are results: textual productions of ethnographic research and writing. On the other hand, they are mechanisms of practical and mental orientation. As expressed by Malinowski (2014), "the object of scientific training is to provide the empirical investigator with a *mental chart*, in accordance with which he can take his bearings and lay his course" (p. 46). Thus, we recognize the inevitable interaction of the researchers with SVOD services, both in the urban space and in the online environment, governed by algorithmic systems. Peñamarín (1999), who notes that disorientation is a fundamental experience of postindustrial worlds, explains that maps are helpful because they provide "objective knowledge of the territory expressed in a symbolic system of visual representation" (p. 18). As summed up by García Leiva (2016), "a map is a guide, a way to visualize a territory and, of course, to situate oneself in it" (p. 14).

In the dynamic SVOD territory, the creation of maps allows us to identify and classify works and to recognize the relationships among them. Tables 1 and 2 show data from our map and *ad hoc* methodological tool.² We refer to the chart from which the data is taken as Map 2, which includes a different page per year, organized on a monthly basis. This is how we visualize and situate ourselves in the SVOD territory. The tables correspond to March 2021 and March 2022, and they illustrate the mapping of the most promoted SVOD works after observing their advertisements in media, social media, and/or the urban space. The map is structured around the examined services and variables: place and countries of production of the works (international and national); the release date and the format of the titles; and the potential observation of OOH advertising. For the latter, a number of x's are included depending on their minor (x) or major (xxx) presence in several advertising formats. No x is included if no OOH advertising is identified.

² All tables and figures have been elaborated by the authors.

Table 1. Most Promoted Works by Transnational SVOD Services in Spain, March 2021.

| Services | International titles | OOH | National titles | OOH | Remarks |
|-------------|---|--------------|--|--------------|--|
| Apple TV+ | --- | | --- | | --- |
| Disney+ | *5/3. <i>Raya and the Last Dragon</i> (Hall, López Estrada, & Briggs, 2021; United States, animation film) 19/3. <i>The Falcon and the Winter Soldier</i> (Spellman, 2021; United States, miniseries)—original | x xxx | 26/3. <i>Besos al aire</i> (Madrona, 2021; Spain, miniseries)—original | x | *Simultaneous release: theatres, SVOD |
| HBO | *11/3. <i>Generation</i> (Barnz & Barnz, 2021; United States, series)—original **18/3. <i>Zack Snyder's Justice League</i> (Snyder, 2021; United States, film) 27/3. <i>Tina</i> (Lindsay & Martin, 2021; United States, United Kingdom, documentary film)—original | | --- | | *Producer: Lena Dunham **TVE news, 16/3 |
| Netflix | 24/3. <i>¿Quién mató a Sara?</i> (Valenzuela, 2021–2022; Mexico, series)—original | | 5/3. <i>Nevenka</i> (Sánchez-Maroto, 2021; Spain, documentary series)—original *19/3. <i>Sky Rojo</i> (Martínez Lobato & Pina, 2021–2023; Spain, series)—original | x xxx | *Hotel RIU, Quevedo, Colón Square, Getafe, Times Square. Trailer features a song by Rosalía |
| Prime Video | *5/3. <i>Coming 2 America</i> (Brewer, 2021; United States, film)—original **26/3. <i>Invincible</i> (Kirkman, 2021; United States, series)—original | xxx | 26/3. <i>La templanza</i> (López Rubio, 2021; Spain, series)—original | | *Premiere: planned for theatres; YouTube, <i>El País</i> newspaper **Weekly episode release |

Table 2. Most Promoted Works by Transnational SVOD Services in Spain, March 2022.

| Services | International titles | OOH | National titles | OOH | Remarks |
|-------------|---|-----|---|-----|---|
| Apple TV+ | --- | | --- | | --- |
| Disney+ | *11/3. <i>Turning Red</i> (Shi, 2022; United States, animation film)—original | x | --- | | *Pixar. Deals with diversity in Canada. |
| | 30/3. <i>Moon Knight</i> (Slater, 2022; United States, miniseries)—original | x | | | |
| HBO Max | 3/3. <i>The Tourist</i> (Williams & Williams, 2022–present; United Kingdom, Australia, United States, Germany, series)—Max original | | --- | | |
| | 6/3. <i>Winning Time: The Rise of the Lakers Dynasty</i> (Borenstein & Hecht, 2022–2023; United States, series)—HBO original | | | | |
| | *7/3. <i>King Richard</i> (Green, 2021; United States, film) | | | | *Oscar 2022 Academy Award, Will Smith |
| Netflix | 11/3. <i>The Adam Project</i> (Levy, 2022; United States, film) | x | --- | | OOH big format, Madrid. |
| | 25/3. <i>Bridgerton. S2</i> (Van Dusen, 2019–present; United States, series)—original | xx | | | Madrid Fashion Week |
| Prime Video | 4/3. <i>Star Trek: Picard. S2</i> (Beyer, Chabon, & Goldsman, 2020–2023; United States, series)—original | | 11/3. <i>El desafío: 11M. S2</i> (Agulló, 2022; Spain, documentary miniseries)—original | | --- |

In these tables or maps, works are identified according to their original titles. Different seasons of a given series are considered different titles. Of the 12 audiovisual works observed in March 2021, three are promoted by Disney+, three by HBO, three by Netflix, and three by Prime Video. No works by Apple TV+ were identified during this month. Furthermore, 10 of 12 works were promoted as originals. Of the identified works, eight are international titles, while four are Spanish titles. Of the eight international titles, six were produced in the United States, one in Mexico, and one was a coproduction between the United States and the United Kingdom. Moreover, seven titles are series, three are films, and two are documentaries (one documentary film and one documentary series). Within 2021, March was selected as a noteworthy month for the study of SVOD promotion and advertising because of the

significant number of titles, the combination of international and national titles, and the exploration of case studies such as *The Falcon and the Winter Soldier* (Spellman, 2021), an international Disney+ original, and *Sky Rojo* (Martínez Lobato & Pina, 2021–2023), a national Netflix original. Additionally, March may be considered a “regular” month for SVOD promotional activities, in contrast with months marked by special campaigns such as Christmas or summer.

Nonetheless, when comparing March 2021 with March 2022, significant differences are observed. The map of March 2022 includes nine works (three less than a year before): two are promoted by Disney+, three by HBO Max, two by Netflix, and two by Prime Video. Again, no works promoted by Apple TV+ were identified. Out of the nine works, seven are originals. Significantly, there is only one local title. Of the eight foreign titles, seven were produced in the United States, while the remaining one was a coproduction between the United Kingdom, Australia, the United States, and Germany. Moreover, five titles are series, three are films, and one is a documentary (series). If we add up the results from March 2021 and 2022, we identify 21 works (17 originals; 10 promoted through OOH advertising). Six were promoted by HBO Max, five by Netflix, five by Disney+, and five by Prime Video. There are 16 international titles (13 U.S. productions) and five national titles. 14 works are series, and seven are films. This small sample of most promoted works is representative of monthly mapping, and it suggests a predominance of foreign works and series in the SVOD advertising territory deployed in Spain.

Results

This section reveals quantitative data and a qualitative discussion about the promotion of SVOD services in Spain during 2021 and 2022. First, Table 3 summarizes the performances of the five observed services. The biannual results are shown in several figures. The results of the most promoted audiovisual works are aligned with the three main variables established: place of production (national, international) and number of originals; format (series, films, programs, documentaries); and OOH advertising.

Table 3. Most Promoted Works by Transnational SVOD Services in Spain, 2021–2022.

| 2021–2022 | Apple TV+ | Disney+ | HBO | Netflix | Prime Video | TOTAL |
|-----------------|-----------|---------|-----|---------|-------------|-------|
| International | 20 | 51 | 33 | 44 | 22 | 170 |
| National | 0 | 2 | 10 | 41 | 24 | 77 |
| Total | 20 | 53 | 43 | 85 | 46 | 247 |
| Series | 16 | 34 | 26 | 61 | 27 | 164 |
| Movies | 4 | 18 | 10 | 17 | 8 | 57 |
| Documentaries | 0 | 1 | 5 | 4 | 7 | 17 |
| Programs | 0 | 0 | 2 | 3 | 4 | 9 |
| Originals/Excl. | 20 | 40 | 32 | 75 | 42 | 209 |
| OOH | 0 | 31 | 10 | 34 | 15 | 90 |

The resulting total of most promoted titles in 2021 and 2022 is 247. Of these, 129 titles correspond to 2021, and 118 correspond to 2022. The average number of most promoted works per month is 10.3. In terms of range, November and December are the months with more works (31), followed by January (28),

and September (24). This is in sync with the key importance of Christmas and back-to-school campaigns. The months with the least promoted works are October (12) and February (13). Seen in sequence, the February valley may represent a contrasting response to the previous peak. Furthermore, these months included ongoing advertising of works that were released and already promoted in previous months, including *House of the Dragon* (Condal & Martin, 2022–present), and *The Lord of the Rings: The Rings of Power* (McKay & Payne, 2022–present), as well as new channels like Star (Disney+, 2021–present), season finales—*Euphoria* (Levinson, 2019–present)—and branding campaigns, all of which are not counted as new monthly titles. In the remaining months, an intermediate number of titles were identified: March (21), June (19), July (18), May (17), August (17), and April (16).

Figure 1 provides a general visualization of the most promoted works by the observed SVOD providers in the Spanish market during 2021 and 2022. The vast majority of these works are labeled as original or exclusive: 85% (209/247). These are the titles with which streamers develop stronger identification, distinction, and branding. Netflix is the company that promotes more works: 34% (85/247). Apple TV+ promotes the fewest works: 8% (20/247). Disney+ (22%, 53/247), Prime Video (19%, 46/247) and HBO Max (17%, 43/247) are at an intermediate level.

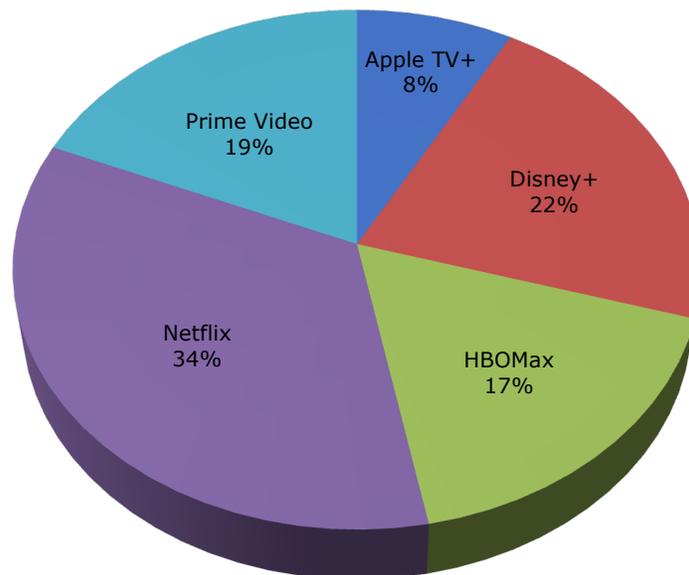


Figure 1. Most promoted works by transnational SVOD services in Spain (2021–2022). Total works: 247.

Audiovisual Works and Place of Production

The place of production of a work is a key aspect of the audiovisual industry, particularly in film and television. It speaks about economic aspects like where the financing originated and about cultural aspects, including linguistic diversity, diversity of identities, and diversity of worldviews represented. From a political economy perspective, these issues are observed in terms of power relations and ongoing competition within a global scenario. For instance, the European film market has typically been dominated by U.S. productions, as U.S. cinema's share has repeatedly reached approximately 70% of the market.³ In response, Europe has developed protectionist measures to preserve its industry and culture. A similar unbalanced situation has taken place in the Spanish market, where the share of the total box office revenue generated by U.S. films reached 73.5% in 2019, in contrast with the 15% reached by Spanish productions (Statista, 2024).

In the digital SVOD reality, opportunities for global distribution have been heightened, as have the chance for different works and countries to participate. This is best exemplified with Netflix originals such as *Squid Game* (Dong-hyuk, 2021–present), from South Korea; *La Casa de Papel* (Pina, 2017–2021), from Spain; and *Lupin* (Kay & Uzan, 2021–present), from France, which have enjoyed extraordinary global successes. These titles are in the top three of Netflix's most popular non-English TV rankings: Based on their performances in their first 91 days on Netflix, Season 1 of *Squid Game* is first with 265.2 million views, Part 4 of *La Casa de Papel* is second with 106 million views, and Part 1 of *Lupin* is third with 99.5 million views (Netflix, 2024). Nonetheless, further assessments of content diversity in terms of national and international production should be conducted.

The mapping of the most promoted SVOD works in Spain indicates a clear hegemony of the international over the national. As shown in Figure 2, the majority of most promoted works are of international production: 69% (170/247) vs. 31% (77/247) of national works. Within international works, U.S. productions stand for the vast majority: 82% (140/170), while added production from other countries (France, United Kingdom, South Korea, Japan, Mexico, Argentina, and Ireland) accounts for 8.8% (15/170).

³ In 2019, the U.S. market share in the European Union was 68.2% (European Audiovisual Observatory, 2021, p. 40). In 2020, the pandemic brought the market share taken by U.S. productions to a record low of 49.5%, but the percentage increased to 58.2% in 2021 (European Audiovisual Observatory, 2023, p. 40).

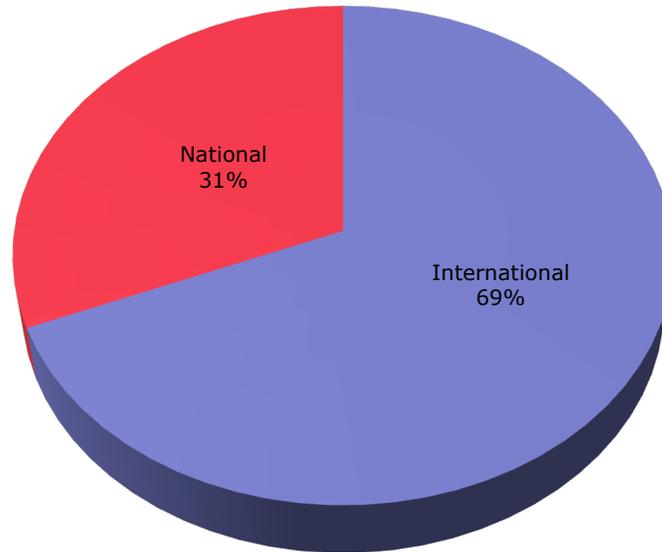


Figure 2. Most promoted works by transnational SVOD services in Spain (2021–2022), according to place of production. Total works: 247.

The remaining international works, 8.8% (15/170), are coproductions: four from the United States and the United Kingdom, one from the United States, Poland, and Hungary; one from the United States and Poland; one from the United States and Mexico; one from the United States and Spain; three from the United Kingdom and the United States, one from the United Kingdom and Italy, one from the United Kingdom, Australia, the United States, and Germany; one from Canada, Ireland, and the United States; and one from Chile and Colombia. Again, the United States leads the way in coproductions. On the other hand, only two national coproductions were observed: a title from Spain and Brazil and a title from Spain and Japan.⁴

As observed in Figure 3, the largest imbalances between foreign and local titles are observed in AppleTV+ (20 international and 0 national works), Disney+ (51 international and two national works), and HBO Max (33 international and 10 national works). The biggest balance is found in Netflix (44 international and 41 national works) and Prime Video (22 international and 24 national works).

⁴ The foreign or local status of co-productions depends on the primary partner: while a production from the United States and Spain is considered international, a production from Spain and Japan is considered national. This information has been checked in the online database IMDb.

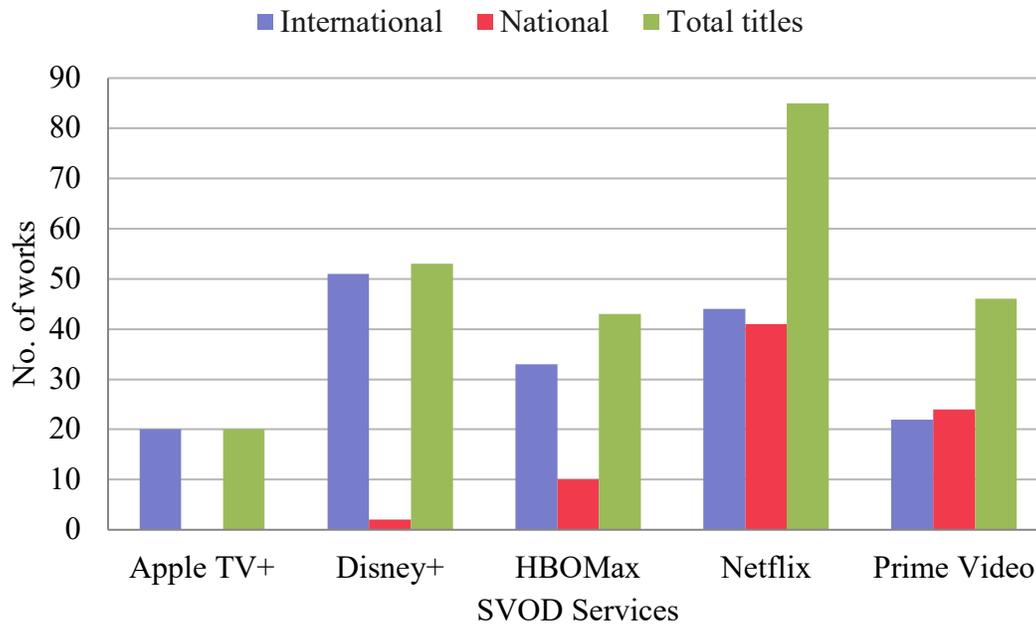


Figure 3. Most promoted works by transnational SVOD services in Spain (2021–2022), according to service and place of production.

Netflix promotes the most national works, 53% of the total of national works (41/77). This suggests that, despite the clear predominance of foreign titles, efforts are being made to promote local works that appeal to local audiences. *Sky Rojo* (Martínez Lobato & Pina, 2021–2023) provides a clear example, even though many local productions like this one tend to look for international audiences through different strategies, including cast selection and OOH advertising both in Spain and elsewhere (European, Latin American, and U.S. cities). Still, Netflix promotes more international than national works: 26% of the total foreign titles (44/170).

Significantly, only in the case of Prime Video did the number of most promoted local works surpass that of foreign ones. Amazon's strategy in the Spanish market combines the release of originals such as *La templanza* (López Rubio, 2021) with exclusive titles that are typically coproduced with linear TV channels, both public and private, including TVE or Telecinco. The long-lived *La que se avecina* (Caballero, Caballero, & Deorador, 2007–present) exemplifies this: originally aired in Telecinco, its 12th season was exclusively released on Prime Video (January 2021) and later aired on linear TV. This illustrates the debt of SVOD services to linear television.

In contrast to Netflix, Apple TV+ only promotes international works. Disney+, Prime Video, and HBO Max are at an intermediate level. Disney+ promotes the most international titles: they represent 96% of its most promoted works (51/53), and 30% of the total of all foreign titles (51/170). *The Falcon and the Winter Soldier* (Spellman, 2021) illustrates the trend of producing U.S. global blockbusters, which may form

part of consolidated franchises such as Marvel Cinematic Universe. About national titles, only two Disney+ works were identified: *Besos al aire* (Madrona, 2021), linked to the creation of the adult-oriented channel Star, and *La última* (Schaaff, Calafí, & Oristrell, 2022), which featured local pop star Aitana. The varying degree of commitment to local cultures relates to SVOD players' different identities and strategies. Netflix's innovation is linked to its ability to showcase works from different countries, while Disney+ relies on mainstream-oriented U.S. franchise works and on the legacy of a film major, The Walt Disney Company.

Audiovisual Works and Formats

The format of audiovisual works is another key aspect of the audiovisual industry. It relates to the historical development of film and television and to its tension, competition, and shifting hierarchies. The mapping of the most promoted SVOD works in the Spanish market indicates that there is a clear hegemony of series over films. As shown in Figure 4, most of the works are series: 66% (164/247). Movies represent almost a quarter of the most promoted works (23%, 57/247), while documentaries (7%, 17/247) and programs (4%, 9/247) have a much lower presence.

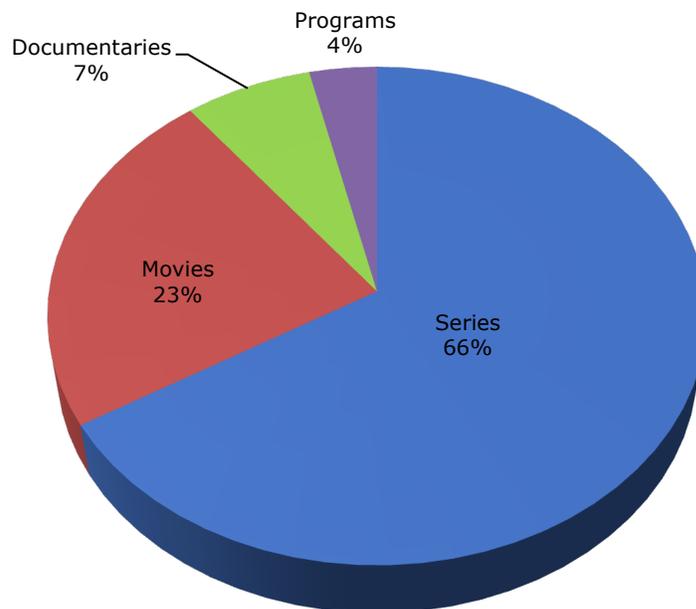


Figure 4. Most promoted works by transnational SVOD services in Spain (2021–2022), according to format. Total works: 247.

Moreover, as shown in Figure 5, Netflix leads in the promotion of series, Disney+ leads in movie promotion, and Prime Video leads in documentary and program promotion.

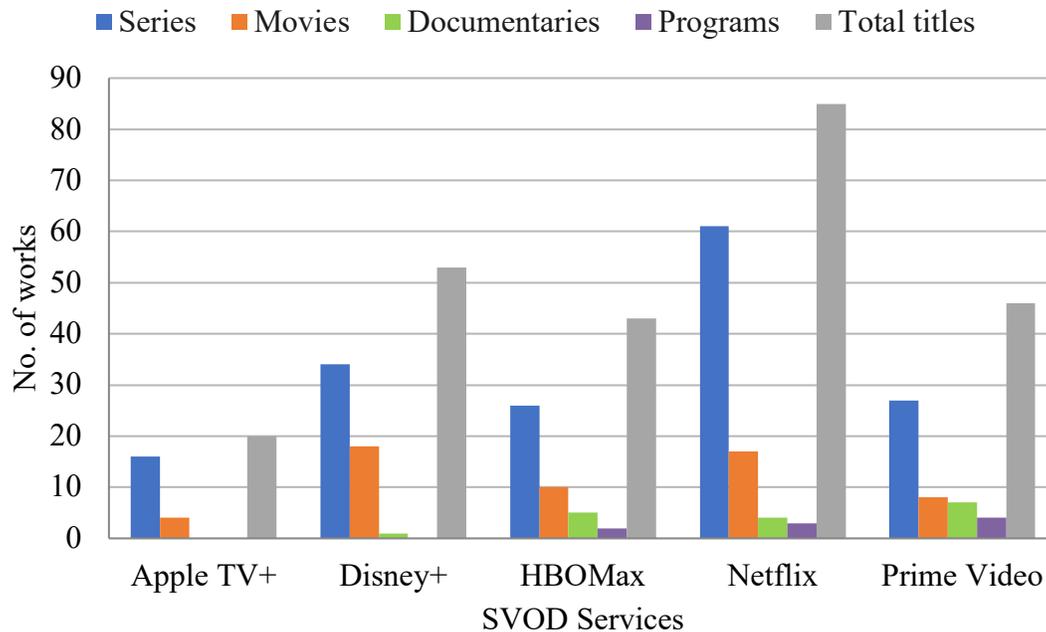


Figure 5. Most promoted works by transnational SVOD services in Spain (2021–2022), according to service and format.

These results suggest that, while film has historically represented art discourses in the audiovisual industry, series have transcended mere association with televisual entertainment to become a prime cultural product of the digital era. This renewed status of series is deeply connected with the popularization of SVOD services, with its higher popular appeal and cultural prestige than traditional television, and with the changing pace of serial consumption and society. SVOD services represent the convergence of film and television and the disruption of deeply entrenched categories that converge within online and offline territories.

Audiovisual Works and Out-of-Home Advertising

One key finding of this research is the discovery of the strategic value of OOH advertising in the promotion and advertising of SVOD services. We confirm the hypothesis: Works promoted through OOH advertising form a privileged selection of the most promoted works: 36% (90/247). Only a small part of the most promoted works are granted the special economic and symbolic investment of OOH advertising. We also confirm that SVOD operators use OOH advertising as a fundamental strategic tool to proclaim their presence in different markets, such as the one under study. In the face of hyper-population and accessibility in the online sphere, where many can publish, the OOH advertising of transnational SVOD companies is a demonstration of their power, conveyed through special actions, novel formats, and large advertisements in symbolic locations.

While OOH is a conventional form of advertising, its persistent and renewed presence illustrates its ongoing dynamism and dialogue with digital and social media. The works promoted through OOH advertising are strategically selected by SVOD services to stand out in the public space and sphere, bringing extra attention and recognition to the companies. Together, audiovisual works and promotional campaigns allow SVOD services to break into the media agenda and social conversation. Thus, rather than settling for their unique time and space, OOH advertising campaigns are increasingly planned as offline spectacles that anticipate online mediatization and social media dissemination. Examples of this were observed in titles by Netflix, HBO Max, Disney+, and Prime Video.⁵

In Spain, OOH advertising has more than 120,000 locations, including 5.635 digital screens (Oficina de Justificación de la Difusión [OJD], 2021). A developing sector, OOH was the fifth media in terms of investment in 2021 (Infoadex, 2022). Figures 6 and 7 illustrate the strategic value of OOH advertising in SVOD promotion and advertising. Netflix and Disney+ lead the way in the use of OOH advertising, as they represent 37% (34/90) and 34% (31/90) of the total. Prime Video follows with 16% (15/90), and HBO Max with 11% (10/90). In the case of Apple TV+, no works were identified in this category.

Figure 6 illustrates the weight of OOH advertising in relation to the most promoted works by the observed services. It shows that Disney+ employed OOH advertising in more than half of its most promoted audiovisual works (58%). This is a remarkable rate, highlighting Disney+'s rapid integration into the Spanish market since 2020. It is, by a considerable margin, the highest number compared with the other services: Netflix (40%), Prime Video (33%), HBO Max (23%), and AppleTV+ (0).

⁵ These include: *Sky Rojo* (Martínez Lobato & Pina, 2021–2023), *Stranger Things* (Duffer Brothers, 2016–present), *House of the Dragon* (Condal & Martin, 2022–present), *The Batman* (Reeves, 2022), *The Falcon and the Winter Soldier* (Spellman, 2021), *She-Hulk: Attorney at Law* (Gao, 2022), *Coming 2 America* (Brewer, 2021), and *LOL: Si te ríes, pierdes* (Sopeña, 2021–present). Consider examples of *Stranger Things* in Bilbao and Madrid (<https://acortar.link/isBH99>); *Coming 2 America* in Madrid (<https://rb.gy/1couwg>); and *The Batman* in Valencia (<https://acortar.link/gIMDuY>). These eye-catching transmedia campaigns are typically developed in dialogue with international advertising campaigns.

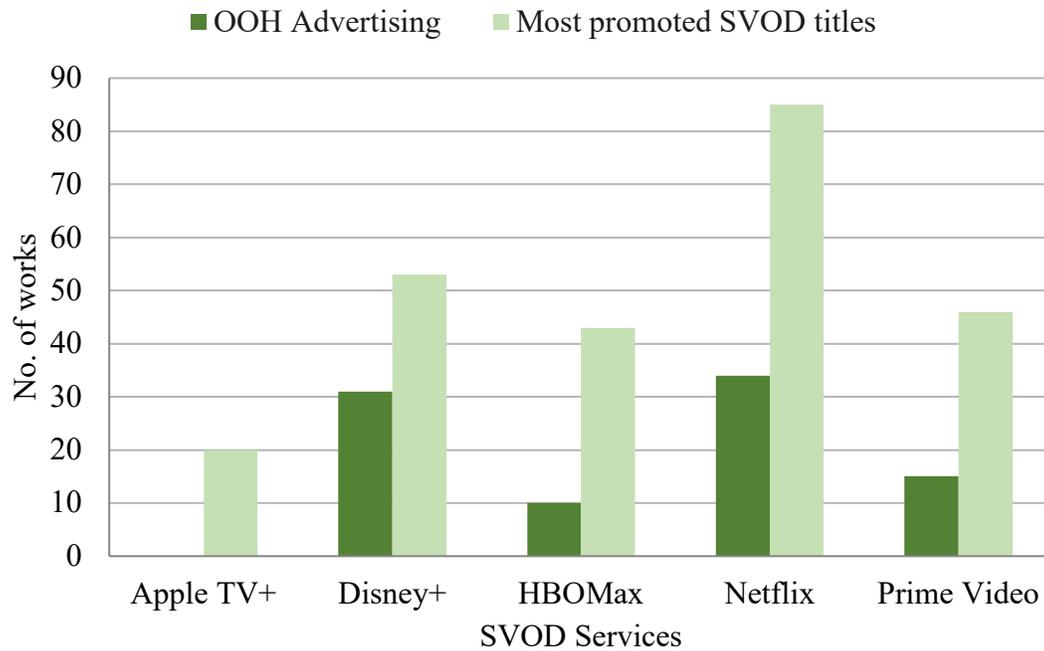


Figure 6. Most promoted SVOD works in OOH advertising in Spain (2021–2022), according to service. Total OOH works: 90. Total works: 247.

Figure 7 shows the number of most promoted works through OOH advertising, according to the different SVOD services and the place of production of the works. This allows us to visualize the promotion patterns of each service provider and to affirm the prevalence of international works (62%) over national works (37%) in the promotion of audiovisual content by these transnational SVOD services. Significantly, Netflix promoted more national than international works through OOH advertising: 19 and 15, respectively. This is also the case, yet with smaller numbers, with Prime Video: nine national titles and six international titles. In contrast, Disney+ has only two national titles, along with 29 international ones.

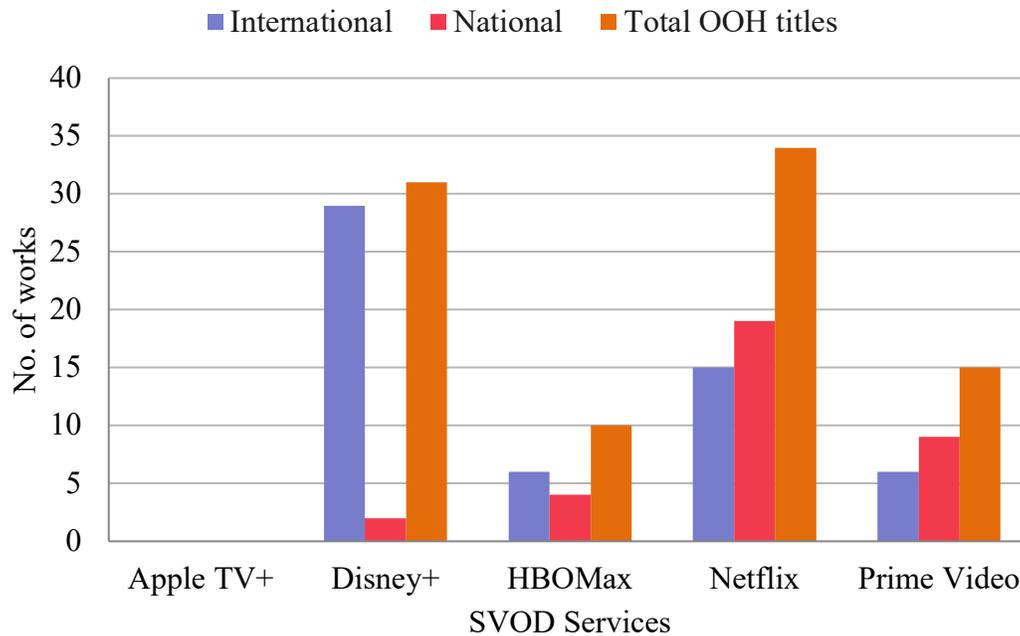


Figure 7. Most promoted SVOD works in OOH advertising in Spain (2021–2022), according to service and place of production.

Conclusions

Based on research conducted in 2021 and 2022, this article has explored the presence of transnational SVOD services in Spain by focusing on the promotion and advertising of audiovisual works by Netflix, Prime Video, Disney+, HBO Max, and Apple TV+. The first aspect worth highlighting is that audiovisual works constitute the main advertising object of SVOD companies. There is a strong identification between SVOD brands and the works they distribute, particularly their so-called originals, which provide valuable material for brand identity.

About the established variables, the mapping indicates three general conclusions about the most promoted SVOD works in the Spanish market:

1. There is a clear hegemony of international works over national works, even though there are significant variations between SVOD services. Within the promotion of international works, there is a majority of U.S. productions, pointing toward the cultural hegemony of the United States and the ongoing difficulties for other countries to compete in the global scenario.
2. About the format of audiovisual works, there is a clear hegemony of series over films and a rather marginal emergence of documentaries (increasingly documentary series) and programs, including humor and reality shows.

3. OOH advertising has strategic value for SVOD promotion and advertising, since the works that access this medium represent a privileged selection of the most promoted works, which are in turn a limited selection of the number of works that are available in SVOD catalogs.

From the prism of content diversity in the Spanish market, these conclusions illustrate clear unbalances about the place of production and the format of the most promoted SVOD titles. Format is clearly dominated by series, and this trend may hinder further film production and distribution while adding pressure for stories to fit into serial production patterns. Furthermore, the dominance of international works over national titles echoes concerns about U.S. media and cultural imperialism in Europe, particularly the traditional unbalances in the film industry. Clearly, content diversity is still a work in progress. However, the different nature and performance of transnational SVOD providers prevents broad generalizations.

In this regard, the mapping results allow us to reach more particular and accurate conclusions through the ranking and comparison of the observed services:

1. Netflix, the hegemonic SVOD player, is the service that promotes more works, the one that promotes more national works, and the one that promotes more series. It ranks second in OOH advertising.
2. Disney+ ranks second in the number of works promoted and first in the number of international works promoted. It is the service that promotes more films, and it ranks first in OOH advertising.
3. Prime Video ranks third in the number of works promoted. It promotes more national than international works. It is the service that promotes more documentaries, and it ranks third in OOH advertising.
4. HBO Max ranks fourth in the number of works promoted. It promotes more international than national works and ranks fourth in OOH advertising.
5. Apple TV+ ranks fifth in the number of works promoted. It only promotes international works, and it ranks fifth in OOH advertising.

The resulting profile of the observed SVOD services brings further insight into their promotional and advertising strategies in Spain, as well as into the business and cultural identities of their transnational providers. Created in 1997 as a DVD movie rental service, Netflix is the only true SVOD player whose business model relies essentially on subscriptions. While its sample of most promoted works is still dominated by international titles, it leads the way in embracing the production and distribution of local original works, which represent different cultures, places, and languages around the world. Accordingly, Netflix strategically represents and identifies itself with the notion of diversity both on-screen and off-screen (Asmar, Raats, & Van Audenhove, 2022; Pedro, 2022a). Its promotional, advertising, and branding strategies may be associated with the idea of glocalization, since it seeks local stories with the potential to become global hits. The dialogic interaction between local and global is key in their distinction from other SVOD services, and we may speak of a glocalization-influenced model for SVOD promotion.

Disney+ is integrated into a multinational mass media and entertainment company, the Walt Disney Company, whose origin is found in the film industry. While the conglomerate is diversified, both within and beyond the audiovisual industry, the Disney brand and imaginary are still intimately linked to

Disney films associated with the legacy and trajectory of the major film studio Walt Disney Pictures, founded in 1923. Thus, it makes sense to find Disney+ leading the way in the number of films promoted. However, the number of series promoted by Disney+ is higher than the number of films promoted, and this speaks about its adaptation to the current era of hegemonic serial fiction. Its production and promotional policies may be considered opposite to Netflix: Rather than assuming the risk of investing in unknown local stories, Disney+ typically relies on successfully proven formulas, sagas, and franchises such as family-oriented animation works, serial adaptations of the *Star Wars* (Lucas, 1977) saga, and big-budget miniseries based on the ever-expanding Marvel Cinematic Universe. Compared with Netflix, its strategy is to produce and promote fewer and bigger works directed toward an established global fandom that is ideally already familiar with their narrative universes. Therefore, Disney+ may be associated with a blockbuster model, which mirrors a more unidirectional and homogenizing notion of globalization, reminiscent of the premises of media and cultural imperialism theory.

Prime Video has not been as aggressive in promoting audiovisual works in the Spanish market, although it enjoys increasing success among audiences. Its key distinguishing factor in terms of the business model comes from the fact that the SVOD service is bundled with online shopping on Amazon. It is part of a bigger offer, whose cost is assumed by consumers to enjoy free shipping and prime member status on Amazon. Prime Video's strategy resembles Netflix because of its interest in and emphasis on local works, and it may also be thought of as a glocalization-influenced model. In fact, Prime is the only SVOD service whose number of most promoted local works surpasses that of most promoted foreign works. Nonetheless, an important difference between Prime Video and Netflix is that the works promoted by Prime Video do not typically reach the same level of success as Netflix originals. They arguably have less pressure to become hits, and this allows Prime Video to diversify the format of works, as it leads the way in the number of documentaries and programs promoted.

Currently integrated with the Warner Bros. Discovery conglomerate, the HBO Max SVOD service has been marked by its shifting nature. It arrived in the Spanish market as HBO, transformed into HBO Max, and recently became Max. This reveals a lack of stability that affects the development of a consistent promotional strategy for its works and brand. HBO Max retained part of the valuable symbolic capital associated with HBO as a sign of quality television, but it also resembled Disney+ because of its connection with a currently operating film major such as Warner Bros. Pictures, founded in 1923, and a comic-inspired universe like DC. Its promotional presence in the Spanish market has been slower than the three aforementioned services, and its promotional strategy has typically been centered on foreign works, even if they count with significant local productions. Overall, HBO Max's performance may be framed within the homogenizing notion of globalization related to media and cultural imperialism theory, but it is a mixed and impure representation of it.

Finally, Apple TV+ is much less known and promoted in the Spanish market. Integrated into a multinational technological company, Apple, the service is primarily used by those citizens-consumers who own Apple equipment. Rather than directly competing with the more established transnational SVOD services, Apple TV+ seems to be comfortable in its association with minority exclusivity and cultural distinction. It only promotes foreign works, showing no interest in local works or identities, and it does not

invest in OOH. Its lack of mainstream aspiration and territorial conquest ambition distances its performance from the media imperialism paradigm.

As observed, the reality of transnational SVOD services in Spain is constantly evolving. Through its empirically based comparative approach, this article provides quantitative and qualitative insights into the promotion and advertising activities of these services in the Spanish market, which may resemble or be compared with other markets in Europe and elsewhere. As transnational SVOD services deploy their online and offline territories throughout the world, it is pivotal to produce research maps that allow us to examine their presence in different markets and the evolution of audiovisual industries and mediated culture in the twenty-first century.

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