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Spanish cinema in the Netflix catalog: a diversity perspective[1]

El cine español en el catálogo de Netflix: una aproximación desde la perspectiva de la diversidad

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The arrival of the multinational Netflix has had a strong impact in all markets. This article analyses the diversity of its catalog in Spain using the results of two catalog stills taken in November 2018 and July 2019. In addition, these data are compared with those of the main international SVOD platforms operating in Spain (HBO, Amazon Prime Video and Rakuten TV) and with those of the platforms of Spanish origin (Movistar+, Filmin and FlixOlé). The work draws conclusions that are not very encouraging regarding the diversity of Spanish cinema in the Netflix catalog.
Keywords: Netflix, Spanish cinema, catalog, diversity, SVOD.

La llegada de la multinacional Netflix ha generado un fuerte impacto en todos los mercados. Este artículo acomete un análisis en términos de diversidad de su catálogo en España con los resultados de dos fotos fijas del catálogo realizadas en noviembre de 2018 y julio de 2019. Además, estos datos se comparan con los de las principales plataformas de SVOD internacionales que operan en España (HBO, Amazon Prime Video y Rakuten TV) y con los de las plataformas de origen español (Movistar+, Filmin y FlixOlé). El trabajo arroja conclusiones poco esperanzadoras a propósito de la diversidad del cine español del catálogo de Netflix.
Palabras clave: Netflix, cine español, catálogo, diversidad, SVOD.

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Introduction

The arrival of Netflix, in 2015, has shaken the audiovisual ecosystem in Spain. Globally, the impact of subscription video-on-demand (hereinafter SVOD) platforms and the attention they received from researchers around the world make this audiovisual formula of production/dissemination one of the research areas with more development in recent years (Albornoz & García Leiva, 2019; Heredia, 2017; Jenner, 2018; Lobato, 2019; Lotz, 2017; Straubhaar et al., 2019). One of the key issues is the evaluation of SVOD platforms' impact on local audiovisual communication systems (Albornoz & García Leiva, 2021; Cascajosa, 2019; Dwyer et al., 2018; García Leiva, 2019; Izquierdo-Castillo, 2015; Lobato & Scarlata, 2019; Wayne, 2019) as there is a significant alteration in the logics established in the markets and previous public policies. As they are Over The Top (hereinafter OTT) services, their initial regulation has been complex because they operate, on many occasions, from outside the national (and even continental) territories, thus breaking the established flows of audiovisual products and the basic rules of fiscal coexistence (Sobrino, 2019).

The first objective of this paper is to analyze how OTT platforms have landed in the Spanish market. The second is to evaluate the impact of these platforms on the supply of locally produced programming, focusing on the case of Netflix and its impact on the diversity of Spanish content offered. This measure of diversity will particularly consider the production companies, their genres and the production dates of the compiled films.

Regarding the political economy of communication and culture, we focus on the Los Gatos company because, although there are platforms that began operating earlier in Spain (Filmin, Movistar+, Filmotech/FlixOlé, Wuaki.TV/Rakuten TV, RTVE.es), its growth in subscribers and the effect of its arrival at the media level has fueled a triumphalist discourse on its effects on production and the generation of a panorama of diversity for broadcasters and audiences (Aranzubia, 2020).

When we talk about audiovisual, the impact of this type of platforms has been fundamental for the film and television industries that were already hit after the general economic crisis, and the crisis in the audiovisual sectors in particular, in the last decade (García Santamaría, 2018; Monzoncillo & Villanueva, 2016).

The new audiovisual platforms have confirmed the rupture of the dual logic of flow and publishing industries established by Flichy (1980) by generating a more evident convergence between the producer and the broadcaster and eliminating the logic of the programmatic flow, which has been replaced by a system marked by the algorithmization of cultural consumption. The consumer's choice is valued, but the diversity of supply and subsequent consumption is, as we shall see, clearly conditioned by the platform and its interface, requiring an average audiovisual viewer to have access to different platforms to achieve a varied consumption.

From a methodological and structural point of view, the first part of this analysis will provide the context of the audiovisual sector in Spain and Europe, with emphasis on the digital sector and OTTs operating in the territories. The second part will relate how the arrival of Netflix in Spain has been presented based on a review of secondary sources. Finally, and to begin to quantify in a more precise way what Netflix's impact has been, this article will examine the results of two still photos of Netflix's Spanish catalog that we took in November 2018 and July 2019. The collection of information focused on the variables of film, director, production company, year of production and genre on a corpus of 139 (2018) and 119 (2019) Spanish films that comprised its catalog at those times. In addition, we will compare Netflix to other platforms present in Spain at that time, focusing on selected variables. Thanks to this research, we know which Spanish films can be accessed by users of the platform and we can undertake an analysis in terms of that catalog's diversity of supply (Albornoz & García Leiva, 2017; Napoli, 1999).

The digital audiovisual sector in Spain

The current picture of the digital audiovisual sector in Spain is marked by some key trends that have been developing in recent years. If we think about the relationships between the two differentiated logics of audiovisual consumption, the consumption of television flow and the consumption of on-demand products (in the movie theater, video, digital archives and current VOD services), these already produced significant crises due to substitution. For example, the emergence of video recorders/ players and the ubiquity of television sets already resulted in a significant number of movie theater closures in neighborhoods and towns throughout Spain during the 1970s and 1980s (García Santamaría, 2015).

The subsequent evolution of television and the development of commercial Internet continued to modify consumption habits and significantly alter the audiovisual market. As an example, in the year 2000, cinema penetration (weekly attendance) was 11% and in 2019 it was 4.6%, after a rebound from 3.9% in 2018. Television in 2000 had a daily penetration of 89.2% with 222 minutes of consumption per day, and in 2019 its penetration was 85.4% with 212.9 minutes per day (Asociación para la Investigación de Medios de Comunicación [AIMC], 2020).

If we focus on pay TV consumption, Spain has never been a big market for it, although there has been a significant change in recent years marked by triple-play offers (telephone-Internet-television) from telecommunications operators and by the growing offerings of OTT platforms that, in many cases, link their development and acquisition strategies to the same operators. To understand this important transformation and, according to the *Marco General de los Medios en España* (General framework of media in Spain) study (AIMC, 2020), in 2015 the penetration of pay TV was 26.5%, and in 2019 it reached 57%. According to the chart presented by this study (see Figure 1) the high penetration between 2017 and 2019 is striking as the reception of OTT services rose from 2% to 41%. In the absence of user and/or subscriber figures provided by the platforms themselves, this study (based on some 29 000 surveys of people over 14 years of age) gives us a clear idea of the impact of the different OTT platforms, with Netflix occupying the first place in terms of penetration with 35.3%, Amazon Prime Video 13.4% and HBO 11.7%.

Among the national platforms, Movistar+ stands out with 20% penetration, and pure OTT platforms such as Filmin have 0.8%. FlixOlé is not represented in this study.

TABLE 1
GENERAL FRAMEWORK OF MEDIA IN SPAIN

Evolution of pay TV 2015-2019

(% individuals)	1st wave 2015	2nd wave 2015	3rd wave 2015	1st wave 2016	2nd wave 2016	3rd wave 2016	1st wave 2017	2nd wave 2017	3rd wave 2017	1st wave 2018	2nd wave 2018	3rd wave 2018	1st wave 2019	2nd wave 2019	3rd wave 2019
Receive pay TV	26.5	26.8	28.6	30.8	32.3	33.5	35.2	35.9	39.1	43.7	45.2	51.6	53.3	55.3	57
Receive traditional platforms	24.1	24.5	26	28	29.1	29.9	30.5	30.2	32.4	33.6	33.9	35.3	34.3	35.3	33.6
Movistar TV	16.2	16	16.4	17	17	17.2	16.7	16.6	18.4	19.9	19.4	21.3	21	21.8	20
Vodafone TV/Ono	4.7	5.5	5.5	6	6.2	7	7.6	7.5	7.5	7.2	7.6	7.2	6.5	7	6.8
Orange TV	0.7	0.6	1.6	1.8	2.4	2.6	2.9	2.7	3.1	4.1	4.4	4.4	4.8	4.5	4.8
Euskaltel TV	1	0.7	0.8	1.1	1.1	1.1	1.1	1.2	1.2	1.1	1.1	0.9	0.9	0.9	0.8
Telecable Asturias	0.8	0.8	0.7	0.8	0.8	0.6	0.7	0.8	0.8	0.7	0.8	0.7	0.8	0.6	0.7
R Galicia	0.8	0.7	0.6	0.8	0.7	0.7	0.8	0.7	0.6	0.6	0.6	0.9	0.6	0.6	0.7
Jazztel (1)	0.1	0.1	0.4	0.5	0.6	0.7	0.8	0.8	0.9						
Receive OTT's	0	0	0.1	0.5	0.6	1.2	2.6	4.1	6.1	20.4	21.1	28.9	33.7	36.5	41
Netflix				0.4	0.5	1.1	2.5	3.8	5.5	16.3	17.8	23.9	28.5	30.6	35.3
Amazon Prime Video							0	0.1	0.3	3.3	3.5	7.1	9.7	10.8	13.4
HBO							0.2	0.3	1.3	5.4	5.1	7.9	8.1	11.3	11.7
DAZN														1.3	1.9
Rakuten TV	0	0	0	0.1	0.1	0.1	0.1	0.1	0	0.2	0.3	0.8	0.9	1.3	1.2
Sky										0.6	0.4	1.2	1.5	1.3	1.1
Filmin														0.7	0.8
beIN Connect									0.2	2	1.4	0.8	0.8	0.7	0.5

Note: It includes individuals who pay as well as those who access for free.

(1) Since the 1st wave of 2018 Jazztel becomes Orange TV.

Source: AIMC (2020).

Therefore, the OTT landscape in Spain, whose structure and development are extensively documented in the article "Online platforms and audiovisual diversity: challenges for the Spanish market" (García Leiva, 2019), is led by the three major platforms of US origin (Netflix, HBO and Amazon Prime Video), and they were joined by Apple TV+ in November 2019 and Disney+ in March 2020. In addition, Spain also has Rakuten TV (founded in Barcelona as Wuaki.tv and currently owned by a Japanese group dedicated to e-commerce), which offers movies on demand, and the subscription service Starzplay.

As for OTTs with mainly Spanish capital, the aforementioned Filmin and FlixOlé stand out. Filmin was owned until 2020 by several Spanish producers and distributors and the French companies Metropolitan Film Export and Le Meilleur du Cinema; in November 2020, it became controlled by the venture capital fund Nazca Capital, with the entry in its share capital of Seaya, another venture capital entity. FlixOlé[4] is owned by producer Enrique Cerezo and the Swedish company Magine Pro. To these we must add the attempts by conventional television channels to establish online access platforms: the Atresmedia channels, with Atresplayer; Mediaset, with its MiTele platform; and the public corporation RTVE, with RTVE.es. The latter achieves significant visitor traffic thanks to its offer of entertainment programs, news programs and series. RTVE's platform also offers Playz, an online space for audiovisual innovation. On the other hand, it does not offer films, despite being an important financier of national production. Finally, the two large private audiovisual groups and public television have a common platform with a presence on Internet-connected televisions called LovesTv.

This whole scene is regulated by two fundamental tools, the General Law on Audiovisual Communication (LGCA) of 2010 and the EU's Audiovisual Media Services Directive (AVMSD), the latter of which was last revised in 2018. These rules address two fundamental issues in the case of digital services: investment in audiovisual content production and the establishment of content quotas of up to 30% for European

4 Between 2007 and 2018, Enrique Cerezo's Spanish film catalog found a home in Filmotech, the EGEDA platform that to some extent would be replaced by FlixOlé in 2018.

content available on the services. According to the LGCA, private television and telecommunications operators are required to invest 5% of revenues in European production and public operators are required to invest 6%. They must invest 60% of this percentage in cinematographic films; 75% in the case of public operators.

Within this regulation, OTT SVOD platforms would fall under the category of “program catalog service providers”, which also have this obligation. However, the main SVOD platforms, most of them with capital of origin and headquarters outside Europe, present a problem due to the opacity of their content consumption data and the establishment of their tax headquarters outside the countries where they generate revenues. Although the National Commission of Markets and Competition (CNMC) obliges the so-called “program catalog service providers” to invest 5% of their revenues in audiovisual production, in its 2019 report it highlighted the exemption from this obligation of three companies (Flooxplay –Atresmedia’s subsidiary for its defunct platform Flooxer–; Cineclick –a limited-impact online videoclub service–; and Comunidad Filmin S. L.) for not reaching the minimum revenues according to Royal Decree 988/2015; only Rakuten TV complied with this requirement by investing 571 485 euros. None of the three major audiovisual OTTs with US capital (HBO, Amazon and Netflix) were listed among these providers since they are not established for business, tax and legal purposes in Spain.

Regarding the 2018 AVMSD, at the time of writing it is still in the process of transposition into Spanish law, but it already requires a minimum of 30% of European production in SVODs. According to a recent report by the European Audiovisual Observatory (Grece & Jiménez Pumares, 2019) that evaluated the presence of European cinematographic films in 136 SVOD services, 35% were European films (EU28), of which Spain is represented in 6%; the AVMSD report does not specify percentages across platforms but is limited to a global analysis. At the end of 2018, there were estimates that 16% of the works on Netflix and Amazon services in Spain were European (Clarke, 2018).

The arrival of Netflix in Spain

Netflix's landing in Spain took place in October 2015. Long before that date, the media had already repeatedly announced the imminent arrival of the streaming giant in our country (Europa Press, 2011; Minue, 2012). Among the reasons given at the time to explain the successive postponements of Netflix's arrival in Spain, high piracy rates were one of the most frequent. As is often the case, the explanation for this delay is more complex; it was structural factors –more accurately, the pace of consolidation of the SVOD market on a global scale–.

According to McGahan et al. (2004), the life cycle of an industry is divided into four stages: fragmentation, consolidation, maturity and decline. The "fragmentation" stage is a sort of pioneering period in which there are few barriers to entry into the business and there is a proliferation of small companies (start-ups), with little capitalization, which are born driven by the business opportunity but which find themselves in a market in which the conditions (for example, technological or demand) are not yet in place for them to be profitable. This is why these pioneering companies either disappear quickly or are absorbed by larger companies.

In the next stage, which we can consider "consolidation", the barriers to entry into the business begin to proliferate. In other words, a certain size becomes necessary. This is the period in which, through mergers and acquisitions, large companies are created, which will later take the lead in the maturity stage. In the specific case of the global SVOD market, improvements in broadband, compression systems, the increase in the size of screens and the ostensible improvement of catalogs will create demand that did not exist before. Finally, we speak of "maturity" when the oligopoly that will dominate the market for a long period of time is consolidated; and of "decline" when the dominant companies are unable to innovate and other industries take over their market.

To some extent, the arrival of Netflix marks the transition from fragmentation to consolidation in the Spanish SVOD market. When Emma García, Director of Content and Acquisitions at Vodafone TV (Diversidadaavv, 2019), drew attention to the standstill caused by the delay of Netflix's arrival in the SVOD business in Spain, she identified the Los Gatos company as the fundamental agent or engine for the consolidation of a market, until then clearly fragmented, in which many small companies coexisted. Some of these small companies were ephemeral (Youzee, 400Películas); others, more long-lived (Wuaki.tv/Rakuten TV, Filmin, Filmotech/FlixOlé), but with many challenges in making their businesses sustainable.

Not by chance, just a year before the arrival of Netflix in Spain, telecommunications companies (Telefónica with Digital+ and Vodafone with ONO) entered the SVOD market (Monzoncillo & Villanueva, 2016), paving the way for the definitive consolidation of a business in which two types of companies would stand out from then on. On the one hand were telecommunications companies, which are committed to a mixed grouping strategy known as *triple play* (the possibility of combining television, Internet and telephony), which allows them to attract new customers and build loyalty among those they already have (in 2014, Yomvi, Digital+'s SVOD platform, became part of the Movistar+ package); on the other hand were OTT services. Over the last five years, following in the wake of Netflix, other major OTT service providers operating on a global scale have been joining the Spanish market: Amazon Prime (in December 2015), HBO (in November 2016), Apple TV+ (in November 2019) and Disney+ (in March 2020). Although, at first, the coexistence between the so-called "telecos" and the OTTs was marked by confrontation, the agreements –on the one hand, between Movistar+ and Netflix, and between Vodafone and HBO on the other– have served to consolidate the market. Whereas the logics of business expansion are similar to those of other countries in our environment, it is striking how quickly the Spanish market has gone from extreme fragmentation to a situation of consolidation. According to Ripoll (2018), founder of Filmin, "Spain is a unique case in the European Union, as we have gone from topping the piracy rankings to doing so in the online platform per capita rankings" (p. 33).

Since its arrival in Spain, Netflix has bet on this country as a strategic place as far as its own production is concerned. Its first original productions were the film *7 años* (2016) and the TV series *Las chicas del cable* (2017) (Castro, 2017). The importance for the company of the Spanish-speaking market, together with the technical and creative talent of the Spanish audiovisual industry (Neira, 2019) and the affordable production prices, are the reasons behind the decision to locate the company's first audiovisual production center in Europe in Tres Cantos (Madrid). In the last five years, the North American giant has produced several television series in Spain: *Las chicas del cable*, *Paquita Salas*, *Elite*, *La casa de papel*, *Diablero*, *El crimen de Alcasser*, *Alta mar* and *Brigada Costa del Sol*, among others. As far as cinema is concerned, Netflix has been involved in different ways in the production of feature films such as *7 años*, *Fe de etarras*, *Dos cataluñas*, *Elisa y Marcela*, *Diecisiete*, *A pesar de todo* and *Klaus*.

Case study: Spanish cinema in the Netflix catalog

As previously mentioned, studying the way in which Netflix contributes to the diversity of the Spanish audiovisual industry is a complex task due to the opacity that surrounds the OTT activity in Spain. The confidentiality clauses that Netflix introduced in its contracts with Spanish production companies deprive us of relevant information when studying diversity from the point of view of supply (that which in the glossary of the Diversidad Audiovisual group's website is defined as "diversity offered") –i.e., of creation and production–. The same is true of diversity consumed, which, according to this definition, "is related to the diversity of those audiovisual goods and services effectively accepted and enjoyed by agents and/or citizens" (Diversidad Audiovisual, 2020, s.p.).

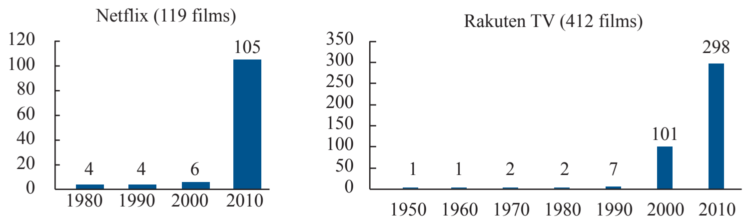
Our analysis of the presence of Spanish audiovisuals in the Netflix catalog starts from two stills that we made in November 2018 and July 2019. The procedure used consisted of using the lists of Spanish productions that the ICAA (Spain's Institute of Cinematography and Audiovisual Arts) prepares every year to check how many of those titles are available in the catalog. The two time slices have helped us to study the evolution of that part of the catalog –i.e., the flow of withdrawals and additions– over time. This "title-by-title" research has been complemented with the data provided by the European Audiovisual Observatory (EAO) on the presence of Spanish cinema in the Netflix catalog and in the catalogs of other platforms operating in Spain.

According to the data provided by the European Audiovisual Observatory [EAO] (2018), in 2017 the presence of Spanish cinema in the Netflix catalog was 4%. Although this figure is above the average of the 27 European Netflix catalogs (according to the EAO, 2%), it is very similar to that offered by the four major European producers (United Kingdom, France, Germany and Italy). In other words, of the 2 156 films that made up that catalog, 87 were Spanish. One year later, our first snapshot shows that, of the 2 832 film titles in the catalog, 139 were Spanish (4.9%). The increase in the overall number of films was proportionally reflected in the increase of Spanish films. As with Netflix catalogs in other countries, during the first years of the company's implementation in a particular territory, the catalog grew to achieve a diverse offer that aimed to serve as a lure to attract and retain new users (Napoli, 2016).

The second still was taken in July 2019, nine months after the first one, and the presence of national production had decreased in the catalog from 139 titles to 119. The number of withdrawals amounted to 46 and the number of additions to 27. Beyond the relative surprise of seeing that, after three years of growth, the catalog had stagnated or shrunk, with the consequent loss of variety and diversity, the most striking aspect of this variation arose when we looked at the profiles of the specific films. All the films that disappeared from the catalog were released in theaters in the 2000s or the early 2010s. Only Pedro Almodóvar's films, and two other titles released before 2010 –*Mi vida sin mí* (I. Coixet, 2003) and *Celda 211* (D. Monzón, 2009)– survived on Netflix in July 2019 after the readjustment of additions and deletions just mentioned. Thus, the criterion that had been followed when withdrawing some films and not others was a criterion of topicality.

At this point, it should be noted that the presence of Spanish cinema in the catalogs of international OTTs operating in Spain is, in some cases, insignificant; in July 2019, and according to the EAO's Lumiere VOD database, HBO and Amazon had 14 and 11 titles, respectively (Lumiere VOD, 2019). On the other hand, platforms such as Netflix and Rakuten TV limit their offer, almost exclusively, to Spanish cinema of the last two decades (see Figure 1).

FIGURE 1
SPANISH MOVIES BY DECADE. JULY 2019

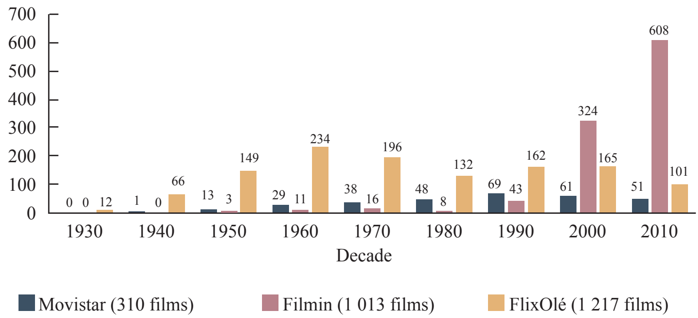


Source: The authors based on own data (Netflix) and Lumiere VOD (2019) (Rakuten TV).

In Netflix, for example, the only titles in its catalog with a release date prior to the year 2000 corresponded to the batch of Almodóvar films that was bought from the production company El Deseo. The Spanish film offerings of the most significant national platforms moves from Filmin's commitment to titles from the last two decades (both commercial films and auteur or independent films) to Movistar+, which favors Spanish films made during the last 50 years, and FlixOlé, which, being specialized in Spanish cinema, offered the only catalogs in which the classics of our cinema (films released, above all, during the Franco period) were more numerous than films from the last decades (see Figure 2).

When it introduced modifications to its Spanish film catalog between November 2018 and July 2019, Netflix's decision to cancel all but two productions from the 2000s and some from the early 2010s exposed a strategy based largely on the commitment to those films whose media impact was still present in the memory of the viewer when they were released on the platform. We are talking about a sort of "drag effect" that usually accompanies both the productions involving the two major generalist television channels and their parent groups (Telecinco/Cuatro –Mediaset España–, and Antena 3/La Sexta –Atresmedia–), which usually take advantage of their programming to announce their premieres and turn them into "events", and those that have won awards (especially the Goyas) and have had, consequently, an extra promotion.

FIGURE 2
NUMBER OF FILMS PER DECADE IN SPANISH CAPITAL PLATFORMS. JULY 2019

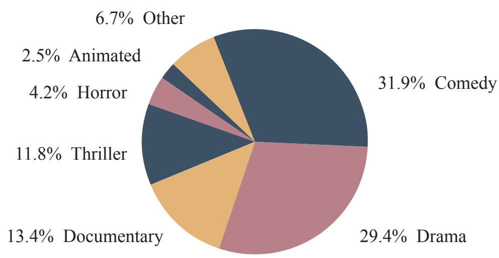


Source: The authors based on Lumiere VOD (2019) database (Filmin and Movistar+) and own data (FlixOlé).

These productions will also enjoy greater visibility in the Netflix interface, as evidenced by the simple exercise of entering the criterion "Spanish cinema" in the platform's search engine. The substitution of some titles for others based on their topicality seems to us to be an operation that casts reasonable doubts on the data engineering that both the company itself and the Spanish media often publicized and on which a good part of Netflix's success supposedly rests.

At a production diversity level, and considering that in Spain there were 319 production companies in 2019 (Ministerio de Cultura y Deporte, 2019), it is a clear bet on a certain type of Spanish cinema, which subtracts diversity from Netflix's catalog by concentrating 40% of its July 2019 offering in the major productions of Atresmedia Cine (23 titles in the catalog), Telecinco Cinema (10), Telefónica (9) and Grupo Zeta (5). In this way, this offer transfers to the field of OTTs that process of increasing homogenization in which Spanish cinema has been immersed in recent decades (García Santamaría, 2018). This homogenization or loss of diversity is evident, from the point of view of supply, in the growing number of films produced by television platforms, which lessens the weight that independent Spanish production companies traditionally had. From the point of view of demand, the homogenization is clear from the fact that in 2016, 75.3% (and in 2017, 85%) of Spanish viewers who went to the cinema did so to see films produced by Atresmedia Cine and Telecinco Cinema (García Santamaría & López Villanueva, 2019).

FIGURE 3
PERCENTAGE OF FILMS BY GENRE. JULY 2019



Spurce: Netflix catalog.

In relation to the popularity of the films offered by Netflix, we highlight the figures related to the genre of the films present on the platform in July 2019. As Figure 3 shows, more than 60% of the films offered are dramas and comedies –a figure that connects with the most successful genres at the movie box office in recent years (Espinel, 2017)–.

As we have just seen, the specialization in the platforms' catalogs forces the consumer interested in obtaining a diverse audiovisual diet (in specific genres or national cinematographies) to subscribe to several streaming services. In the case of Spanish cinema, it would be necessary to subscribe to one platform specializing in the greatest hits of contemporary Spanish cinema (Netflix or Rakuten TV), another in Spanish auteur or independent cinema (Filmin) and, finally, one that has a good assortment of our cinema's classics (FlixOlé and, to a lesser extent, Movistar+).

Conclusions

To understand the circumstances surrounding the recent arrival of OTT platforms in Spain, as we proposed in the first objective of this article, it is important to bear in mind that, beyond the peculiarities of the Spanish audiovisual system (the lack of previous penetration of pay TV, for example), what has led to this new scenario are the dynamics of the online distribution business on an international scale. In other words: Netflix (which was, of the large OTTs, the first to operate in the Spanish market) took a long time to arrive because the streaming business did not yet have the circumstances (technological, for example) to make it profitable. In the Spanish case, consolidation came from OTTs but also from the triple-play offers of the telecommunications companies, with Telefónica at the forefront. The furious fight for the market between one and the other soon gave way to a logic of collaboration that has proved to be profitable for both, insofar as it has helped the streaming business to become a profitable business in Spain as well. In addition, the high penetration of OTT services in Spain in just a few years has put paid to the idea that supply and consumption through parallel circuits (so-called piracy) were what prevented the development of an offer of this type.

As for the second of this article's objectives, although it is still too early to quantify the real impact that Netflix and the other OTTs have had on Spanish film production, it does seem clear that the Los Gatos company is helping to revive a sector, that of production, which the economic crisis of 2008 had plunged into a deep depression. The decision to make Spain the location of the studios that will help raise the European production index required by the new directive is excellent news in this sense. However, it should not be forgotten that the crisis in Spanish cinema is a systemic and that, therefore, the solution to its problems (starting with the absence of well-funded production companies) can hardly be derived from the irruption of new agents, no matter how powerful they may be.

On the other hand, our analysis of the presence of Spanish cinema in the Netflix catalog makes extensible to the Spanish case the conclusion of Napoli (2016) that the first years of implementation of the platform in a given country are marked by a gradual increase in the number of titles that results in a diverse catalog, at least from a purely quantitative point of view. However –and this is evidenced by the results of the two snapshots we took in 2018 and 2019– at a certain point, the catalogs begin to dwindle. Specifically, in nine months (between November 2018 and July 2019) the number of Spanish films dropped from 139 to 119.

The most striking conclusion derived from the results of the two still photos is that the diversity offered not only decreases in quantitative terms (there are 20 fewer Spanish productions) but also qualitatively, since we have discerned a certain homogenization of the offer from Netflix clearly betting on a certain type of Spanish cinema. That type is the high-budget Spanish films produced in the last ten years by the two major generalist television networks and, to a lesser extent, by the major media groups; in other words, that cinema which in recent years has overwhelmingly dominated (more than 80%) the screen share of Spanish cinema. This cinema, from the aesthetic and narrative point of view, also clearly tends toward standardization, since the typical story behind these productions is a story that desperately seeks to satisfy the average spectator. It is a story that constantly relies on formulas well known to the general public: clichés, stereotypes, commonplaces; a story that leaves the task of conveying its meaning to the spectator mostly in the hands of the dialogues; a story, therefore, alien to any kind of expressive audacity; a story, in short, that does not seem to contribute much to the evolution, in aesthetic terms, of Spanish cinema. With few exceptions (Almodóvar's films and some independent or medium-sized productions), the Spanish films in Netflix's catalog belong unequivocally to this category.

Thus, the user loyalty strategy of Netflix does not take into account differentiation based on quality –as, for example, with the positioning of HBO (Jaramillo, 2002)– but is based on the idea of a voluminous catalog (which, as we have just seen, is increasingly shrinking) in which the user can always find something to watch. According to Neira (2019), the more popular a content is [within Netflix] the more similar content the platform offers. It is not surprising, then, that Spanish cinema, which sweeps the box office and is characterized by standardization, is gaining influence within its catalog.

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