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Audiovisual production in the streaming era: transformations, narratives and global challenges

Lorena Antezana | lantezana@uchile.cl
Universidad de Chile
https://orcid.org/0000-0003-3195-3325
Carlos Gutiérrez-González | carlos.gutierrez6@unisabana.edu.co
Universidad de La Sabana
https://orcid.org/0000-0002-0646-4653

Abstract

Over the past ten years, streaming platforms have become the preferred medium for both serialised fiction and non-fiction — as well as hybrid audiovisual content — transforming the role of audiences and giving rise to other forms of narrative expansion that continue to reshape the media ecosystem. Moreover, audiovisual productions on these platforms seek global audiences, which requires producers to develop stories that, while retaining their original and local character, engage with broader tastes and preferences. This is where the premise "think local, produce global" becomes relevant, representing a challenge for the industry that entails changes in business models, cultural policies, funding schemes, and the professionalisation of the creative sector, as well as inevitably, shifts in audience behaviour. Audiovisual content platforms are here to stay, and it is already possible to observe that the speed, flexibility, and associative capacity of production companies to adapt to these transformations are key to the survival of the Spanish-speaking industries.

Keywords

Audiovisual production, industry, streaming, business models, television

During the first decades of the current century, the film and television landscape has undergone a profound structural transformation, marked by the decentralisation and diversification of audiovisual industries, particularly television. In the last decade, a genuine revolution in global production has taken place, driven by the emergence of streaming platforms that have become the leading medium for serial fiction as well as for non-fiction and even hybrid content.

This paradigm shift has displaced a model largely based on competition among local production companies seeking projects to finance their proposals, moving instead towards the intersection of governance, new incentive schemes, and the territorial capacity for services and infrastructure that enable international productions. In many countries — particularly in Latin America — private and public service broadcasters continue to fight for their place, exploring different business models to position their productions in other markets that may sustain local content creation in the face of global corporate giants. This situation has encouraged alliances between independent production companies and international platforms, as well as the development of government incentives to stimulate national content creation. In countries such as Mexico, Argentina, and Colombia, there has been growth in co-production funds and legislation promoting minimum quotas of national content in global catalogues (Uribe-Jongbloed & Mora-Moreo, 2024). In others, incentives exist to facilitate production and attract foreign investment thanks to diverse locations, support infrastructure, competitive costs, and tax rebates, among other factors.

Furthermore, the expansion of on-demand content has compelled public and private broadcasters to rethink their distribution strategies, adopting their own OTT platforms or integrating into broader services (Antezana, 2021). These local platforms generally serve as a mechanism for accessing live broadcasts and as repositories of archive programming. This has also meant, at least in some countries, that such content is no longer available on global platforms, which could be interpreted as a resistance or protection strategy that, in more developed industries — such as Brazil's — seems to be working.

The tension between local protection and international projection implies a reconfiguration of competition, which is no longer solely about attracting wider audiences but about maintaining their attention over time through personalised algorithms and data analytics (Lotz, 2017). The method of releasing serial productions — entire seasons or weekly episodes — reflects the different retention strategies implemented by platforms and distribution channels. The timing of release dates, either staggered or simultaneous across countries, also forms part of these strategies, which are in turn regulated by contracts or agreements between production companies, financial entities and distribution platforms.

In this context, and particularly from the standpoint of production, online television in Latin America and Spain has managed to respond to the challenges posed by global streaming platforms under the motto "think local, produce global", overcoming early crises and unsuccessful initial attempts as audiences increasingly show interest in stories with local flavours (de Almeida et al., 2025). This phenomenon of glocal internationalisation has enabled successful audiovisual products to become global mass phenomena, even if this often entails content management practices that may lead to the overexploitation of narrative formulas. The need for content that combines local identity with global distribution standards now defines the agendas of major independent production companies and international platforms.

Although a certain standardisation or repetition of narrative formulas characteristic of each platform can be observed — homogenising catalogues to some extent — it is also evident that each national industry is consolidating a distinctive hallmark. This creates a positive synergy between local knowledge and expertise and global guidelines and sensibilities. These latter sensibilities — which may also be understood as "zeitgeist values" — revolve around universal principles such as human rights, gender equality, child protection, and respect for nature and animals, among others. These reflect a necessary cultural shift that responds to current audience preferences.

Audiovisual productions adapt quickly to both local and global events, incorporating themes, characters and situations that portray and interrogate what is happening in our societies: demographic shifts, migration challenges, major global crises — including wars — climate change, the emergence of artificial intelligence and its impact on everyday life, corruption and other issues addressed in the articles included in this dossier.

Another central aspect of this transformation is the emergence of creative responsibility as a valid alternative for operators and producers seeking to tell real stories from their contexts (Gutiérrez-González & Uribe-Jongbloed, 2025). This pursuit of cultural proximity in fiction not only enables the representation of diverse identities but also reshapes the geography of the industry, allowing professionals to work in their places of origin without needing to move to hegemonic production centres (Antezana, 2024). Thus, contemporary audiovisual creation negotiates between artistic autonomy and the demands of constant narrative flows within cultural industries.

Likewise, the expansion of on-demand content has reshaped the role of audiences, integrating the use of artificial intelligence to personalise services and offer differentiated user experiences. Platforms no longer aim merely to attract subscribers but to retain them over time, relying on personalised algorithms and detailed data analytics. This shift towards data-driven and attention-based business models has triggered a transition from purely subscription-based models (SVOD) to hybrid and advertising-based schemes.

This new ecosystem also requires a profound transformation in professional skills within the sector. It is no longer enough to know how to tell a story; today's environment demands profiles capable of handling digital tools, understanding algorithmic operations, and adapting content for multiple screens and formats (Lotz, 2017). Professional training and innovation in education must therefore integrate these skills to ensure sustainability and quality in a market characterised by accelerated production and consumption rhythms.

This special issue includes studies on emerging narratives, social representation, governance, and business models. Regarding the first thematic line, Miguel Martínez Navarro and Almudena Muñoz Gallego analyse a corpus of 5,246 fiction films produced in Spain (2000-2023), showing how thematic and territorial diversification has created an unprecedented landscape for contemporary local production. Meanwhile, Javier Mateos-Pérez, through an analysis of *La Fortuna* (Movistar+), argues that current adaptations of graphic novels transcend mere translation, becoming autonomous works composed of discursive additions and transformations.

The study by Joana Doñate-Ventura, Esteban Galán-Cubillo and Javier Marzal Felici on *La casa de papel* reveals how Netflix's acquisition turned a local product into a global mass phenomenon, enhancing its stylistic and promotional quality. Likewise, Bruna Silva's research on the Chilean industry through the case *Al sur del corazón* identifies how digitalisation introduces new tools and "digital tropes" that redefine the production, distribution and consumption of this traditional genre.

In the second thematic line, a study on representations of political harassment by Bénédicte Brémard analyses productions such as *Intimidad*, *Nevenka* and *Soy Nevenka*, highlighting the sudden interest in stories of women politicians who have experienced harassment following the #MeToo movement, and examining their capacity to construct images of solidarity. Meanwhile, Patricia Palomares-Sánchez and Jorge Abad-Pérez examine the sustained rise of true crime in Spain (2016-2025), noting a preference for the documentary format and a narrative focus on perpetrators rather than victims.

In the third and final line, competition to attract and retain audiences no longer depends solely on content but also on the sophistication of business models and institutional support through tax incentives and operational capacities. Thus, Pablo Jesús Huerta-Viso analyses the institutional positioning of the Valencian Community in comparison with the Andalusian model, identifying strategies to attract film shoots based on coordinated support mechanisms and standardised audiovisual management procedures. Fernando García-Chamizo, Jose Manuel López-Agulló, and Belén Ávila examine the impact of advertising on giants such as Netflix and Disney+, concluding that the hybrid model is consolidating as the emerging standard for optimising average revenue per user.

The eight studies featured in this special issue — authored by scholars from Spain, France, and Chile — confirm that the transformation of the audiovisual ecosystem is not merely technological but entails a reconfiguration of relationships among all players in the industry. The emergence of streaming has compelled public and private broadcasters to reconsider their strategies, adopting their own OTT platforms or integrating into global services to sustain local production (Antezana, 2021). In this regard, innovation labs and film commissions have emerged as essential infrastructure for the economic sustainability of regional production (Uribe-Jongbloed & Mora-Moreo, 2024).

The impact of artificial intelligence and emerging technologies on content creation presents ethical and creative challenges that we are only beginning to grasp, particularly for screenwriting and creative teams. The consolidation of hybrid business models — balancing advertising load with user tolerance — will determine the medium-term viability of current platforms. It also remains essential to continue researching how audiences and fandoms organise and interact in this saturated and fragmented media ecosystem, and how new user experiences are developed (Fieiras-Ceide et al., 2024).

In conclusion, this special issue examines the transformations and challenges facing audiovisual production industries — especially those in Spanish-speaking regions — from a rigorous academic perspective. The works presented here offer a comprehensive overview of emerging narratives, viewing habits and business models that define our era.

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