sciendo

CREATIVITY

Theories – Research – Applications

Vol. 9, Issue 2, 2022

Are Video Streaming Platforms Stifling Local Production Creativity? The Spanish Case*

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ABSTRACT

International streaming platforms have broken into the European market and are partnering with local production companies to produce content. Online consumption generates a huge database on the tastes and consumption patterns of viewers. Although the business of video streaming platforms is to attract subscribers, all this data could be used to produce content adapted to the different sensibilities of the audience. We want to investigate to what extent entry of the streaming companies has impacted the creativity of the production process in Spain and how creativity may be affected by this. We carried out semi-structured interviews with creative workers who produce for both linear television channels and video on demand platforms. The sample focuses on four workers from independent production companies with years of experience working for the television channels that have started working for new streaming companies. Their responses imply that big data does not appear to reduce uncertainty and is not applied to make decisions in the first stages of the production process. However, production of local shows has changed significantly.

KEYWORDS:
creativity, audiovisual production, streaming platforms, consumer data, subscription video-on-demand (SVOD), television industry

* The research was financially supported by the project "From an architecture of listening and audience interaction to social footprint: good practices in content production" (INTERACT; reference number: RTI2018-101124-B-I00), funded by the Ministry of Science, Innovation and Universities of the Spanish Government (2019-2022).

Article history:

Received: January 13, 2022
Received in revised form: August 13, 2022
Accepted: September 8, 2022

ISSN 2354-0036
DOI: 10.2478/ctra-2022-0015

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INTRODUCTION

The audiovisual market has radically changed with the entry of international streaming platforms (Vacas-Aguilar, 2021; Noam, 2021; Lotz, 2017). Streaming companies, controlled by large multinational tech companies, have reshaped the production, distribution, and reception practices traditionally associated with legacy television (Sanson & Steirer, 2019). They now regularly partner with local production companies to produce local content. New platforms have brought about a change in understanding audiences (Arnold, 2016). The digital revolution has fostered a social change whereby likes, affections, and feelings have acquired social as well as business value (Fernández-Manzano & González-Vasco, 2018). In the age of streaming, there are some researchers who question whether the creativity of creators can be threatened by the algorithm economy (Farchy et al., 2016; Kaye, 2013). Napoli and Ropenack (2018) fear that the abundance of data will discourage innovation and risk-taking. With the present investigation, we want to examine what kinds of data producers can access in preparing television series for the video streaming platforms and how it feeds into the production agreements promoted by these international companies. Finally, we wonder how creativity may be stifled through the use of consumer data extracted from online video consumption.

To achieve these aims, we conducted empirical research through interviews with creative workers from Spanish production companies. Our goal was to see how the new market players have affected their creative decisions. The universe of the study includes independent production companies with significant experience in producing shows for both traditional television channels and subscription-based video-on-demand platforms in Spain.

This paper is structured as follows. First, we define how creativity is used in the context of audiovisual production. We then present a theoretical background for the research, including a description of the transformation of the audiovisual production process and the current research regarding user data and audiovisual production. The following section maps the context of the Spanish television market, where this research is carried out. After describing the research questions and the methodology applied, we present the findings and provide a discussion. Finally, the concluding section outlines some practical implications for local content producers in the streaming era and some questions for further research.

THE CREATIVE PROCESS OF TELEVISION PRODUCTION

This paper addresses 'creativity' as an intellectual and intangible human activity. We assume that media goods can be considered creative goods (Arrese, 2004; Wolf, 1999). Audiovisual products are a combination of technical, monetary, and creative resources, which result from the creativity of scriptwriters, the producer and the rest of the production team, the casting crew and technicians. Audiovisual production implies teamwork and requires coordination of all creative workers.

In each audiovisual product, the creative producer is essential to implement original creative ideas from the scriptwriters. This coordination needs each team to assume responsibility for their own task and have a broad vision of the final result. The first step is scriptwriting. The script is a fundamental first step; however, even if the narrative is coherent and close to the viewers, the rest of the team must do its best to shape the story as a real and marketable product. There are many decisions that need to be taken once the script is written, but they must be aligned with the script itself.

Every labor related to audiovisual production has to muster creative talent. Creative talent is defined as the capacity to coordinate the creative crew that produces an audiovisual work. The difference between the scriptwriter and the producer is that the former is the creator, in the sense that this one creates from scratch, while the latter shapes that idea. According to Pardo (2020), the creative talent of the producer centers around a character able to recruit and organize the needed resources to efficiently create an audiovisual work.

For Pardo (1999), the creative talent has to do with finding the story, selecting the screenwriter, choosing the director and the rest of the creative and technical crew, whose work includes, among others, choosing the music score and the composer, selecting the actors and actresses, preparing the budget and seeking financing, supervising the shooting, controlling the editing, preparing the strategy of previews and release, designing the marketing campaigns, controlling the quality of prints and streaming conditions.

As in other media industries, information and data are needed to make decisions, as media companies are audience-driven companies (Chan-Olmsted & Wang, 2019; Picard, 2010). Within the audiovisual production sector, however, it is not just data that is needed, because the creative work is formed by knowledge, experience, imagination, intuition, and talent that cannot be measured. Lee (2022), who analyzes creativity through the lens of Artificial Intelligence, concludes that the algorithm technology can dehumanize creativity in cultural industries (Lee, 2022). We intend to argue in the same vein as Athique (2017), who affirms that "as long as we remember that audiences are not data, then everything should be fine" (p. 14). The economic value and engagement capacity of an audiovisual work is not easy to predict empirically because it depends on the creative talent of producers and the public taste and emotions of consumers that do not always respond to mathematical predictions (Caves, 2000). Media products share the uncertainty of experience goods.

A fiction series production process carried out in audiovisual production companies inherited three phases all audiovisual production is divided into: pre-production, production, and postproduction. In this process, the first step, which consists of the genesis of the idea and its development, is where creative talent is needed the most, but not solely. Specifically, the process goes from the selection of an idea to making a reference document, which is then used as a guide for the design and development of the whole series and contains the details of the characters and a proposal for the plots. It may sometimes even include the shooting of a pilot episode (Barroso, 1996; Diego & Pardo, 2009; García de Castro, 2002).

While the series is produced, it is also sold to distributors: a television channel, a distributor for the international market, or, more recently, to streaming companies. Traditionally, apart from the budget, casting, timeline, art direction, technical crew, complete episode scripts, storylines, and the agreements related to format rights and royalties, there was an additional series of clauses that showed that the television channel was in a better negotiating position than the production company. In the *audience rate per share point and audience clause*, all contracts state that a minimum share-quota will be applied – usually below the channel average and applicable to a specific number of episodes lower than the total for a season – so that the channel can terminate the contract and withdraw the series while taking responsibility for the funding of those episodes already produced. In addition, there was a *content control clause* applied to all contracts, which authorized the channel to make final decisions regarding script approval, casting and other details related to the content (Diego & Pardo, 2009).

Before the on-demand streaming era, the previous transformation of the television market in Europe, following privatization and deregulation of the television markets, negatively affected creativity in the sense that producers were under significant pressure to produce popular shows that reached as many viewers as possible (Lee, 2012). Lundin and Norbäck (2009) concluded that the industry consensus at the beginning of the 2000s centered on the need to achieve cost efficiency and explore future possibilities of attracting revenues. According to them, "the current industrial wisdom is dominated by exploration into the future tastes of TV audiences" (Lundin & Norbäck, 2009, p. 119). Because of increasing competition, the quality of many shows declined and the creativity of scriptwriters was threatened by homogenization of programs and popularity of low cost shows (Wayne, 2021).

Some years later, arrival of video streaming platforms undoubtedly caused qualitative and quantitative change in the production of TV shows. Since 2015, there has been fierce competition between Netflix, Amazon, HBO and Disney+, among others, and the work of production companies is in high demand. Companies have committed several billion dollars to producing new shows and acquiring popular content from big and small production companies (Flint, 2019). As Shattuc (2020) outlines, streaming companies invest in content according to user preferences and big data analytics.

These streaming platforms reach an international audience, and as public goods, the wider the audience of their shows, the more profitable the content will become, because the cost of reproducing and supplying it to extra consumers is relatively low (Doyle, 2016). When globalized pay-TV or online subscription VOD services buy new content, they typically want exclusive rights across multiple territories and over time (Auletta, 2014).

Increasing demand for new shows is driving up production costs and new buyers are desperately looking for creative talent to produce popular and long life shows. This involves changes in how producers are paid and agreements between producers and distributors. Changing the terms of program financing and remuneration has a real impact on the competitive field in ways that change the creative goods that are created and the cultural functions they take on (Lotz, 2019). Neira et al. (2020) clarified that creative control of Netflix over its programs differs depending on contracts. Control is high in what they call "developed originals:" a production company owns IP and its exploitation rights. On the other hand, "acquired originals" are produced by others, while

Netflix owns the exclusive rights. On the contrary, the “co-licensed originals” rights are distributed in different markets for different owners and the “licensed originals” rights that are exploited by Netflix in a new market are different from the domestic one.

In the new subscription video streaming scenario, audience rating is no longer the only commodity to make money in the television market because their business model is not based on advertising (Lotz, 2017). For example, when BBC One decided not to renew the drama *Ripper Street* after its second season due to low ratings, Amazon Prime stepped in and commissioned additional three seasons. The reason for this was clear: although *Ripper Street* had only garnered a relatively small audience in its domestic market, the show had in fact a global fan base (Hill et al., 2017). In Spain, there is the case of *Money Heist* [La casa de papel] produced by Vancouver Productions for Antena 3; in the third season, Netflix entered as a co-producer and it was launched on the streaming platform too. This was seen as a new exploitation stream by Antena 3 and it eventually became one of the most highly-viewed series worldwide.

According to PriceWaterhouseCoopers (2015), in order to attract attention and build value, companies need to understand how local and global markets are impacted by the changing pace of the media industry. In that sense, streaming services have understood that locally produced content is key in attracting local audiences where they have launched their platform. Local content is close and has a special appeal for audiences (p.e. Salgado, 2010, p. 29–49).

The need to comply with the European Directive 2007/65/EC *Audiovisual media services without frontiers* is the other reason why international streaming companies are battling to produce local content. A new version of the directive drove investment in local production, since the obligation to reserve 20% of programming for European projects affects all audiovisual content providers that distribute their content in EU member states. That is why the international streaming companies have allied with local production companies (from each country) to produce series that can be considered “European”.

LITERATURE REVIEW

Recent literature about audiences as part of the audiovisual creation process and how audience research has changed on the new streaming scenario is abundant (Iordache, 2021; Wayne, 2021; Castro & Cascajosa, 2020). Online consumption data goes beyond how many people watched audiovisual content and their socio-demographic characteristics, as the audimeter panel did. OTT streaming platforms use internal data on what its users watch to make decisions about shows. Havens (2014) outlined the case of Netflix on the example of *House of Cards*. They used the data to select the main actor, Kevin Spacey, as well as the director, David Fincher. Thanks to personal data gathered from viewers, Netflix creates clusters according to tastes, behaviors and topics. In total, Netflix has 19 umbrella genres, 400 subgenres and 76,897 micro-genres (The Atlantic, 2018). Big data obtained from audiences also helps online platforms to classify people who watch a series or movie by measuring the time they dedicate to it. Netflix considers three types of viewers: the "starters" who watch a couple of minutes, the "observers" who view 70% of the series or movie, and the "completers" who watch 90% or more (Drita, 2019). However, Netflix's business model is based on a large catalog formed by high-cost productions, sophisticated algorithm technology, and big marketing campaigns. It does not employ audience data to increase subscriber numbers.

However, some researchers criticize streaming platforms because they do not provide third parties with any meaningful insight into actual audience preferences, and they are not particularly transparent (Lobato 2018; Nelson & Webster 2016). For Doyle (2016), resistance to share data about their audiences adds difficulty for producers to plan optimal exploitation strategies. The lack of data makes one doubt the accuracy and reliability of data collection method (Lotz, 2017; Portilla, 2018).

Finally, research on the interaction *via* social media and collaborative apps between users and viewers is increasing. For some authors (Evans, 2019; Guo, 2018; García-Avilés, 2012), the number of comments that the audience posts in social media is positively related to their engagement with the content. From the industry side, there are some companies, such as *Parrot Analytics*, that measure the digital footprint of television content by tracking online information from social media, viewing online promotional videos, and even keeping note of illegal peer-to-peer downloading of episodes. Kantar Social TV Ratings includes activity on Twitter as a complement to TV audience have addressed the risks for creative talent if algorithms and big data are used to generate content directly without involving writers (Napoli & Ropenack, 2018; Marín-Cano, 2017).

In the present research, we aim to find out how the work of audiovisual producers may be affected by streaming companies. Following Lotz´s insights, while legacy media companies did not have a major impact on creative freedom, in the new platform scenario, "creatives have no idea about how many viewers watch their shows and are dependent on data not externally verifiable" (2017, p. 56). After studying the USA market, the author does not have a clear thought whether this is good or bad for creative producers (Lotz, 2017). Given this managerial dilemma, the question we want to address is whether the user data coming from streaming platform algorithms is stifling creativity.

In light of the concept of "industrial wisdom" (Hellgren et al., 1993; Melander, 1997), our goal is to define the frontiers of creativity in scriptwriting and project development for fiction production in the new streaming ecosystem. For Hellgren (1993, p. 103), industrial wisdom "describes collectively shared ideas, beliefs, values and norms about the rules of the games and possible strategic action in the industrial field." Therefore, we want to see if the new streaming platforms have changed industrial wisdom concerning audiovisual production of content and how this change affects creative tasks.

THE IMPACT OF VIDEO STREAMING COMPANIES IN THE SPANISH INDUSTRY

The Spanish television market is experiencing significant growth due to the market entry of international streaming companies and legal support for private investment in production. Production of fiction grew significantly, from 35 series produced in 2015 to over 60 in 2020. After the implementation of DTT (Digital Terrestrial Television), the launch of new channels and online transformation of traditional television channels, new OTTS (Over the Top Media Services) entered and disrupted the market (Author, 2013). Netflix was launched in 2015, HBO and Amazon in 2016, Sky in 2017 and Disney+ in 2020. In 2020, Netflix was the most viewed platform, reaching 6.2 million households, while Disney reached 4 million, Amazon Prime reached 2.7 million, and HBO reached 1.7 million households (Statista, 2022). By contrast, Sky closed down its Spanish division in 2020.

Streaming companies began investing in Spanish productions. Of the 20 most watched series on Netflix from 2018–2021, three were produced by Spanish companies: *Money Heist* [La casa de papel], made by Vancouver Media; *Elite*, made by Zeta Studios and *Cable girls* [Las chicas del cable], made by Bambú. In 2018, following a strategy to expand and dominate national markets, Netflix opened two subsidiaries in Spain: one company dedicated to development and production of films and series and another dedicated to marketing, business development, and public relations. In the same year, the American company signed an agreement with a local audiovisual group Secuoya to establish its first European production center in Madrid.

Amazon Prime followed Netflix's path and produced a number of Spanish-produced series: *El Cid*, with Zebra Producciones; and *La templanza*, *Three ways* [3 Caminos] and *Little Coincidences* [Pequeñas Coincidencias] with Onza Partners. HBO started producing in Spain in 2019. To date, the titles of the series are: *Foodie Love*, *At home* [En casa], *Stage 0* [Escenario 0], *Thirty coins* [30 monedas] and *Homeland* [Patria], the story of two families affected by ETA terrorism in the Basque Country.

Some of these projects have been funded by Aggrupations of Economic Interest (AIE). The AIE is a legal firm, incorporated in Spanish regulations since the 2007 economic crisis, to incentivize financial aid for audiovisual production and to attract private investment in audiovisual production, thanks to task deduction and co-ownership of the secondary and exploitation rights of the works there are more than 100 audiovisual producers and the market has grown significantly, the television channel market is still an oligopoly: though there are new entrants, the number of broadcasters and streaming platforms are still few (Lundin & Norbäck, 2009).

RESEARCH QUESTIONS AND METHODOLOGY

To prove if there is any difference in the way of production before and after the streaming companies entry in the market, we compare production for linear television companies and new online platforms in light of the differences in data sources available to them and their level of application in creative decision-making. Thus, the research questions were focused on whether consumption online data impacts the industrial knowledge of local production companies in Spain:

RQ1. Is the development process different when local producers work for a video streaming platform or for a linear television channel?

RQ2. If there is a different process? What are the main differences?

RQ3. Which information is shared in the negotiation process between the streaming platforms and the producers, specifically regarding consumption data from the SVOD platforms?

RQ4. How important is social media data for local producers? Do they follow what users say or share on social media to decide creative aspects of the shows?

We conducted an exploratory case study based on semi-structured interviews with four of the creative staff from independent production companies. The sample focuses on independent production companies with years of experience working for television channels, which have started working for the new streaming companies. We thought comparison between both systems could help to better understand transformation of creative work. Up to now, in Spain relatively few production companies have been contracted by new streaming companies and have prior experience producing for traditional television companies.

A qualitative technique has been applied to obtain as much information as possible from each participant. The selected method consisted of semi-structured interviews held during February and March 2020. Since they were busy professionals with tight schedules, we adjusted the dates for the meetings and means of contact for each participant. The first contact was made in person or by telephone. Before the final interviews, we sent them a questionnaire by email. After receiving their answers, we contacted them again to clarify some aspects. Although most of them were accustomed to writing screenplays, their answers were very comprehensive.

Questions for the interviewees included the following: What data or information from the audience does the platform provide in commissioning a program? Do you consider there to be a difference in terms of the creative control you have when producing a season for a streaming platform or for a linear TV channel? While the show is on air, what audience data, viewing numbers, profiles, territories, etc. does the platform provide you with? When a second season is requested, what audience data does the platform provide? Do streaming platform executives modify or suggest changes to scripts, narratives, or characters for successive seasons? Do you pay attention to social media followers and comments related to the programs produced by your company? As a specific change due to streaming consumption, how has binge-watching modified the series development process?

Furthermore, we asked them to describe whether the three key variables – time, cost, and quality – changed in the production process and contracts since they started working for the platforms. In all cases, we asked them to compare the streaming development process with the established one for advertising-funded television companies. Interview transcripts were verbatim and analyzed according to final research questions. Beyond these questions, we also wanted to analyze whether creative freedom has been modified or come under pressure because of the new streaming players in the market. Table 1 below shows the list of questions for the producers, divided into the two main topics: transformation of the creative production process and sharing of collected data on streaming.

Table 1. Questions for creative workers

	Creative process comparison linear *vs* streaming
Q1.	Do you consider there to be a difference in terms of the creative control you have when producing a season for a streaming platform or linear TV channel?
Q2.	Do the streaming platform executives modify or suggest changes to the scripts, narratives or characters for successive seasons?
Q3.	As a specific change due to streaming consumption, how has binge-watching modified the series development process?
Q4.	Have time, cost and quality of production changed in the production process and contracts since they started working for the platforms
	Collected data on streaming
Q5.	What data or information from the audience does the platform provide in commissioning a program?
Q6.	While the show is on air, what audience data, viewing numbers, profiles, territories, etc. does the platform provide you with?
Q7.	When a second season is requested, what audience data does the platform provide?
Q8.	Do you pay attention to social media followers and comments related to the programs produced by your company?

The participants came from different production companies. They have produced drama series for free-to-air television channels such as TVE and Atresmedia and platforms such as Netflix and Amazon Prime in Spain. We did not interview anyone from Mediaset, the other audiovisual competitor, because up to the present moment, Mediaset does not want to compete against the streaming companies. As its CEO stated, "Telecinco produces television for viewers who watch the programs, not for those who do not watch them" (Saiz, 2018). They do not yet trust the streaming data. They prefer to base their strategy on live television and reality shows. Table 2 below lists production companies and platforms our anonymized participants worked for.

Table 2. List of participants and companies

	Production company	Previous TV partner	Current SVOD platform
E1 & E2	Onza partners (2014)	Atresmedia Telecinco TVE TVI (Independent Televisión, Portugal)	Amazon Movistar +
E3	Zeta Studios (2009)	Atresmedia TVG (Televisión Gallega)	Netflix Movistar + Amazon HBO
E4	Bambú (2007)	Atresmedia TVE BBC	Netflix

All participants are outstanding professionals thanks to their extensive experience in the creation, writing, and production of fictional series in Spain. They have established expertise in the writing and production of successful shows before and after streaming video platforms launched in Spain. The interviewed professionals were executive producers and scriptwriters at production companies. We chose these two professional profiles because they were the most relevant to decision-making in fiction series production. These roles address both creative issues (scriptwriters and sometimes executive producers or show-runners) as well as logistical and financial issues (producers) (Diego, 2005), selected production companies, where these professionals currently work, are three of the most representative in the sector as their works are currently most viewed in Spain and other countries. In addition, they share the experience of having produced both for Spanish linear channels and for OTT platforms.

The first company is Onza Partners (E1 & E2). This company has produced such long-running and successful series for television channels as *The ministry of time* [El Ministerio del tiempo] (TVE, 2015–). They also produced great historical productions for video streaming companies, such as *Hernán Cortés* (Amazon, 2019) or *Parot* (2021, Amazon), as well as comedies, such as *Little Coincidences* [Pequeñas coincidencias] (Amazon, 2018–2021).

The second, Zeta Studios (E3), has been selected because it has produced one of the greatest Spanish hits on Netflix, the youth thriller Elite (2018-). It currently runs its fifth season. Elite is the second Netflix original series in Spain after Cable Girls (Bambú, 2017-2020).

Bambú (E4), the third selected company, is one of the largest Spanish series producers in the last decade. It produced such titles such *White Glove* [Guante blanco] (TVE 1, 2008), *Grand reserve* [Gran reserva] (TVE 1, 2010–2013), *Grand hotel* [Gran hotel] (Antena 3, 2011–2013), *Velvet* (Antena 3, 2014–2016), *Fariña* (Antena 3, 2018). The aforementioned *Cable Girls* [Las chicas del cable] and *High seas* [Alta mar] for Netflix (Netflix, 2019), among others, have also been produced by Bambú.

FINDINGS

The interviewed subjects have different know-how and industrial knowledge, but their answers were similar in terms of the research questions addressed here. In this section, the key findings are presented in relation to the four research questions. In addition, some of the key quotes from interviews are included in the text, since these are considered to be the most informative expressions related to each question.

Changes in the production process

Producers recognize that the market has changed, but not quite enough to transform industrial knowledge of audiovisual production for television. As stated by the third interviewee (E3), "I don't think that being on a SVOD platform or a TV channel is one of the variables that affects creative freedom.” However, the first interviewee (E1) recognized that “The streaming platforms have more resources and leave you more freedom.”

All of them claim that the volume of series production has increased and that they are more expensive and of higher quality. According to E4, an episode of a free-to-air television series has a budget of € 540,000–550,000 and an episode for a streaming platform can cost an average of €1 million, which may increase to €2 million for certain series. In the words of E4, “Budgets have gone up because the series are more ambitious. When the budgets go up, the filming times increase and, undoubtedly, the quality.”

According to the Onza Partners team, the film production model began to be established through the creation of AIE (Aggrupations of Economic Interest), in which the expenses and exploitation rights are shared between the production company, the TV company, and the streaming platform. In fact, many film producers now show interest in producing series because the content for streaming companies has higher artistic and technical quality. As E2 points out, “what has changed in recent years is that audiovisual products are increasingly accessible in a more global market, and therefore exploitation often has second and third windows. This has helped make national production more dynamic and profitable”.

One of the most significant adaptations for the SVOD companies has been changing to meet the terms of the European contract system. When they started their operations in Europe, they tended to use the United States format production agreement, in which English was the common language and different rights protection rules were used according to actors, musicians and other intellectual properties. According to E1, they are slowly adapting to European laws and regulations.

The production time is another variable that has changed. Production is now faster. The narrative structure of the episodes has also partly changed; episodes have a shorter duration than those of the series produced by conventional channels and the public must be hooked in the first few minutes of the series. In this regard, E2 points out that, “For example, there are no longer hooks that keep the viewer in tension for a week, nor do we have to reinforce parts of a plot in case our audience no longer remembers what happened to the character four episodes ago.” As E3 points out, some television series are more like feature films divided into episodes.

Consumption data shared with creators

The response of creators and producers is unanimous: platforms do not provide information on audience consumption. As E1 explains, “With platforms you work with a lot of uncertainty. This has its positive aspects in terms of creativity and the guarantee of continuity of the series, but negative aspects in not knowing whether the public is watching the series, and whether they like it.” There are no further conversations about the success of the series based on their algorithms.

The four professionals agree that they receive more information from the linear television companies. The Kantar audimeter panel can provide them data related to the type of audience that can be reached more easily. According to E3, “the situation is more transparent on television. You have a real x-ray of the impact among the public.”

Production companies develop ideas by considering the audience they are targeting. At the time of sale, information is exchanged with the platforms regarding two basic points: the age range they want to reach and the territories where they want to distribute (because platforms generally take care of subtitling and dubbing). According to the experience of producer E4, once the series is produced and exhibited, Netflix shares the data collected during the first 7 days of a premiere and 28 days after the launch. In this case, they offer two types of information: the number of viewers who have watched at least two minutes of the series and the number of users who have finished the season.

According to the experience of two interviewees, Netflix shares viewing data of a series with production companies confidentially: this information is not public and is published only for investors (E3). E4 explained that, "the series are renewed after verifying that after 28 days the number of people who have finished watching all the chapters is profitable with reference to the investment made according to a formula that the platform has and that we do not know." Despite basing their income on subscriptions, the platforms want to know if the productions are seen by the audience to reiterate the production of similar content or to extend distribution to other geographic markets.

Importance of social media data for the scriptwriters

The production companies that were studied all have social media accounts. Bambú has an account on Instagram that is very active with 84.4k followers. However, its activity on other platforms (Facebook, Linkedin, Twitter, and Vimeo) is very limited. Onza Partners is more active on Facebook; it also has Instagram and Twitter accounts. Zeta Studios has accounts on Facebook, Twitter, Instagram, and YouTube, and all four show intense activity.

Some specific programs have accounts on Twitter linked to the television company or to the platform. The Netflix account is more active when the series is more popular, as exemplified by the *Elite* account. Meanwhile, the accounts on Twitter, Facebook, or Instagram for shows such as *Cable girls* [Chicas del Cable] or *Little Coincidences* [Pequeñas Coincidencias] do not show much activity.

When asked about the importance of user activity on these social networks, the interviewees did not seem to think it warranted special attention. However, E3 thinks that the data from social media give clues about whether the audience is satisfied and whether they like the series. For example, when the Instagram accounts of actors increase in follower numbers, it is "a sign that audiences are on the right track." (E3) They believe social media only provides sensations and comments from a specific target and thus cannot respond to a significant sample or provide rigorous information. That is why these individuals do not usually look at follower data to make decisions about one of the creators (E4) added, "we very soon learned not to modify the series because of the opinions of the followers." E4 had negative experience of modifying the *Hispania* series (Antena 3, 2010–2012) due to the information found on social media, which did not help increase the show's audience, it can be as wrong to want to satisfy the demands of social media as to ignore them. The production process of a series should always move forward in advance of its consumption.

Creative freedom in the negotiating process

When we asked the interviewees about advantages or disadvantages of knowing information on audience consumption for the creative development process, their answers varied. They consider that audience information helps to make correct decisions. For E3, audience data is important so that the cache of the artistic team can be identified; for E2, knowing how the audience receives what they see is essential to producing what they like most. However, E2 recognizes that decisions are currently taken by consensus in the creative team rather than by what audiences watch, comment, or do. Industrial knowledge from the creative crew is more accurate than the "orders of the public" (E2).

Notwithstanding this, the interviewees mentioned some examples where data were used to shape the creative aspects of some of the projects. E4 outlined that according to Netflix, the series that work best in Spain are those dealing with Nazis, which is why they produced a series on that subject. With Amazon, Onza's team had the experience of incorporating a Mexican character, Mauricio Ochmann, because the series *Little Coincidences* [Pequeñas coincidencias] was very popular with the Mexican audience.

The respondents agree that creative control of stories, scriptwriting, actors, and narratives is much greater for the creators now than before, as compared with such freedom in relation to television companies funded by advertising. However, they say that they do not like to work with the uncertainty of not knowing who is watching the series (E1). For E3, creative freedom does not depend on the contractor, but rather on the budget: the smaller the budget, the larger the producer's freedom, because the risk is lower. One of the aspects in which creative freedom is limited is actor exclusivity. According to E1, "platforms require exclusive contracts with actors."

CONCLUSIONS

Our research confirms that the Spanish production market is entering a new development era. In it, new players coexist with legacy companies, as many research projects have previously outlined (Neira et al., 2020; Vacas-Aguilar, 2021). When producers work for a traditional television broadcaster that is airing their series, they can retrieve the number of audience members reached using the national audimeter panel.

The main result obtained in this study is that producers and creators of television series have less information when they work for SVOD companies than when they work for free-to-air TV channels. Although an SVOD platform can manage more information about their users than an open television channel, they do not share it with the producers; and if they do, it is off the record, as one of the interviewees said (E4). The responses confirmed that OTTS are not transparent and do not share data with Spanish producers, as Doyle (2016) and Lotz (2017) concluded in relation to other countries.

When we asked what information they would like to have about the audience next time they work for an online platform, one of the interviewed creators mentioned the need for specific information regarding the goals and needs of the platform before starting the project and another showed interest regarding the audience numbers reached. For the development of a series, they would like to have information about audience gender, social class, residence, and tastes that the platforms are targeting. In the words of E4, “more or less what is necessary [is] to create an ad hoc series for that audience.”

Furthermore, the producers see some differences in the production process for an SVOD platform as compared with a linear channel, as the first question suggested. Budget and production volume of local shows are larger; the production process is faster and the time spent on the production of shows is lower; the episodes are shorter and the artistic value and quality of the series are higher; the possibility of reaching the global market is viable; and suspense narrative is different due to binge watching. In other words, the series are produced as a unique piece instead by episodes.

Having explored how the market entry of large international video platforms affects the production process, we can confirm that creativity from the producers’ side is not currently stifled by online consumption data, since much of the information coming from the streaming platforms is not shared with producers; and what is shared provides few clues as to the creative direction of a series. In an attempt to respond to the creativity direction question, we can assert that the creators have greater control of creative aspects when they work for streaming platforms and do not depend on consumption indicators to make decisions. In this sense, their freedom and creative scope are greater. Rather than being dictated to by audience consumption data, they retain their industrial knowledge to create stories with new and surprising narratives that engage viewers. Certainly, audiovisual production of fiction throughout the process (search for the idea, development, scriptwriting, pre-production, recording, post-production, etc.) requires knowledge, experience, a little luck, and mastery of technique that cannot be substituted by mere consumption data or subjective comments from a public with little or no specialized knowledge. And yet as Pardo (2014, p. 26) pointed out, when detailing the economic principles that govern production of an audiovisual project, “There is no magic formula for sure success and, consequently, it is not possible to guess with certainty the economic potential of the draft.”

Therefore, big data does not limit creativity and innovation in the Spanish market, as Napoli and Ropenack (2018) asserted. There is no risk that data from the past will prevent investment in something groundbreaking in the future, at least for now. Data from consumption feed the algorithm culture that mainly acts as “a means of encouraging consumption” (Farchy et al., 2016, p. 171).

Demand for local artistic talent and audiovisual production activity for television in Spain have increased and programs are now being distributed in other countries. The only problem for creators is that they do not have any data from streaming platforms, which increases general uncertainty across the audiovisual economy that may prove disconcerting to production teams. Though they work with the guarantee that they are producing an entire series, they do not know whether the next season will be renewed.

Hence, uncertainty is still one of the primary features of the attention economy. Consumption continues to be unpredictable, although there are algorithms that attempt to reify audience's tastes and choices. We concur with Sanson and Steirer (2019, p. 1210), who, having studied how streaming television impacted the TV ecosystem, affirm that "legacy practices persist alongside and often in competition with new modes of production, dissemination, and consumption."

Because platforms do not share much information, social media could be an indicator of how series are being received. However, the producers interviewed in this research project try not to be too influenced by the comments on social media when they write new episodes. This research confirms that the Spanish producers interviewed are not unhappy with this lack of information because, although more information would be welcome, they know that excess data or merely following comments from audiences could restrict their creative "nose," as noted by Kelly (2017).

Based on this research, we can conclude that television production in Spain does not follow the nature of the digital economy like other media companies do (Nelson, 2021). It is surprising that, in the data age, producers receive less data than before: SVOD companies have more information, but there is less transparency. Therefore, we have drawn the conclusion that audience data has no weight in the process of creating TV series for streaming audiovisual companies probably because their business model depends on the quality of the catalog rather than on audience ratings. As Lotz (2019) explained, the business model of such platforms does not respond to the earlier model that was sensitive to immediate audience results. Advertiser-funded, schedule-based service seeks to continually offer new programming to maintain attention. Rating data are required and measure success of the content and may determine its end. However, a subscriber-funded, on-demand service creates value from its library's stability and does not benefit when its programming becomes available elsewhere – especially on services that do not require a fee. SVOD platforms manage big data, but for their own reasons, they ultimately trust the producers and their creative ability (Iordache, 2021).

Finally, we conclude that, from the origin of the idea through the writing of the scripts, throughout all phases of production from pre-production to post-production, there is a demand for knowledge, experience, and resources that are not easy to replace with simple impressions or data from algorithms. The way in which SVOD platforms operate might change in the future: they may share all the data they capture with the story creators. At that point, we will have to interview the creators again to find out how the information has influenced their work.

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