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RESEARCH

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THE ADAPTATION STRATEGY OF FREE-TO-AIR TELEVISIÓN IN SPAIN: ATRESPLAYER PREMIUM AND MITELE PLUS IN THE PHASE OF THE INTERNATIONAL SVOD ECOSYSTEM AND THE BREAKDOWN OF CONSUMPTION HABITS

La estrategia de adaptación de la televisión en abierto en españa: Atresplayer Premium y Mitele Plus ante el ecosistema de las SVOD internacionales y la ruptura de los hábitos de consumo

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ABSTRACT

In 2015, the Spanish audiovisual market began a period of transformation. Netflix lands in the country and consolidates the streaming and subscription audiovisual consumption business. From 2019, with 53% of Internet users consuming paid TV, a readjustment of the business and content strategy becomes necessary. The current consumption model is changing and with it the business lines of the main television groups in our country, forced to create and formalize new entities to face and position themselves in the international ecosystem. In this study we analyze the models of the national streaming platforms Atresplayer Premium of the Atresmedia group and

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MiTele Plus of the Mediaset group to determine the state of the conventional agents compared to the international players. A descriptive and content analysis methodology is followed, completed with interviews to the heads of both SVOD, contemplating a close relationship between the current rupture of consumption habits and the consequent destructuring of the sector, and the consequent business decisions that are modifying the work of the national streaming platforms based on the change in demand for content, posing a progressive and changing business scheme. The results of the study of the two main platforms are analyzed from their genesis, the development experienced and the keys to their success. Atresmedia has created a premium content strategy, mainly fiction, and exclusively for its paid application. Mediaset, on the other hand, is betting mainly on the entertainment programs of its main channels and its objective is to gain subscribers for its new line of business through extra content of its star reality TV formats.

Keywords: Television in Spain; Atresplayer; MiTele; On-demand television; Streaming; Content Strategy.

RESUMEN

En 2015 el mercado audiovisual español inicia un periodo de transformación. Netflix desembarca en el país y consolida el negocio del consumo audiovisual en *streaming* y bajo suscripción. A partir del 2019, con un consumo de la televisión de pago del 53% de los usuarios de Internet, se hace necesaria una readaptación de la estrategia empresarial y de contenidos. El modelo de consumo presente cambia y con ello las líneas de negocio de los principales grupos televisivos de nuestro país, obligados a crear y formalizar nuevas entidades que hicieran frente y se posicionaran ante el ecosistema internacional. En este estudio analizamos los modelos de las plataformas de *streaming* nacionales Atresplayer Premium del grupo Atresmedia y MiTele Plus del grupo Mediaset para determinar el estado de los agentes convencionales frente a los *players* internacionales. Se sigue una metodología descriptiva y de análisis de contenido completado con entrevistas a los responsables de ambas SVOD, contemplando una estrecha relación entre la actual ruptura de los hábitos de consumo y la consecuente desestructura del sector, y las consecuentes decisiones empresariales que van modificando la labor de las plataformas de streaming nacionales en base al cambio de demanda de contenido, planteando un esquema de negocio progresivo y cambiante. Los resultados del estudio de las dos principales plataformas se analizan desde su génesis, el desarrollo experimentado y las claves de su éxito. Atresmedia ha creado una estrategia de contenidos premium, principalmente de ficción, y de forma exclusiva para su aplicación de pago. Por su parte, Mediaset apuesta principalmente por los programas de entretenimiento de sus principales canales y su objetivo es lograr suscriptores para su nueva línea de negocio a través de contenidos extra de sus formatos de telerrealidad estrella.

Palabras clave: Televisión en España; Atresplayer; MiTele; Televisión bajo demanda; Streaming; Estrategia de contenidos.

A estratégia de adaptação da televisão gratuita em Espanha: Atresplayer Premium e MiTele Plus face ao ecossistema internacional SVOD e à perturbação dos hábitos de consumo.

RESUMO

Em 2015, o mercado audiovisual espanhol iniciou um período de transformação. A Netflix desembarcou no país e consolidou o negócio de streaming e subscrição do consumo audiovisual. A partir de 2019, com 53% dos utilizadores da Internet a consumir TV paga, torna-se necessário um reajustamento da estratégia do negócio e do conteúdo. O actual modelo de consumo está a mudar e com ele as linhas de negócio dos principais grupos televisivos do nosso país, que foram forçados a criar e formalizar novas entidades para enfrentar e se posicionar no ecossistema internacional. Neste estudo analisamos os modelos das plataformas nacionais de streaming Atresplayer Premium do grupo Atresmedia e MiTele Plus do grupo Mediaset para determinar o estado dos agentes convencionais em comparação com os agentes internacionais. Segue-se uma metodologia descritiva e análise de conteúdos, completada com entrevistas com os responsáveis de ambos os SVOD, contemplando uma relação estreita entre a actual quebra nos hábitos de consumo e a consequente desestruturação do sector, e as decisões empresariais resultantes que estão a modificar o trabalho das plataformas nacionais de streaming com base na mudança da procura de conteúdos, colocando um esquema empresarial progressivo e em mudança. Os resultados do estudo das duas principais plataformas são analisados desde a sua génese, o desenvolvimento experimentado e as chaves do seu sucesso. Atresmedia criou uma estratégia de conteúdo premium, principalmente ficção, e exclusivamente para a sua aplicação paga. Por seu lado, a Mediaset está principalmente empenhada nos programas de entretenimento dos seus principais canais e o seu objectivo é ganhar assinantes para a sua nova linha de negócios através de conteúdos extra dos seus formatos de TV de realidade estrela.

Palavras chave: Televisão em Espanha; Atresplayer; MiTele; Televisão a pedido; Streaming; Estratégia de conteúdo.

1. INTRODUCTION

In the year 2011, the Spanish streaming era began, with the main telecommunications groups in the country starting to take notice of what was happening in the West. The launch was initially modest, thanks to Filmin, Wuaki, and Yomvi from Canal+ (Cascajosa, 2018). During this period, Spanish commercial groups were not really concerned about the arrival of major international distributors since, initially, they had no intention of "establishing themselves on the peninsula" (El País, 2012).

However, Netflix, the American entertainment company's new subscription-based online content broadcasting business, had already achieved success in its home country since its implementation in 2007, starting a domino effect that its competitors would soon begin to imitate. It later expanded to several European countries, including Spain, in 2015 (Canapé, 2020).

Initially, the free-to-air audiovisual corporations in Spain did not follow in Netflix's footsteps. Neither Atresmedia nor Mediaset were concerned about this business model, and in fact, their CEOs warned at the 2018 UTECA annual meeting that they were capable of consolidating their dominance of the audiovisual content market. They only needed the state to restrict the new platforms and equate their business conditions to guarantee that their situation would not change (El País, 2020).

Looking at the history of television in Spain, Canal+ was the first Spanish player to enter the new consumer battle. Inheriting the paid production style of HBO, it facilitated the Spanish public's familiarity with the paid format in an environment where free access was the norm. Indirectly, since 1990, it had been preparing society for the reality that would be established years later, and was a pioneer in paid television in Spain. After obtaining its license, the biggest challenge the channel faced, as explained by Mikel Cid, was:

> Initially, Canal+'s monthly fee was 3,000 pesetas a month, although it later went up to 4,000 pesetas. But how to win over an audience that until then had not paid to watch television? The channel built a programming that wanted to offer a higher quality than the open channels. (Cid, 2015)

Canal+ established itself as a paid channel with exclusive content and a different lineup compared to its private competitors. It coexisted with them for almost 15 years until it consolidated its transformation towards the business models imposed by international players. In 2015, Movistar+ was created within Telefónica, a paid content platform present in the production, distribution, and commercialization phases. It had already launched an online version called Yomvi in 2011 (El País, 2011a). With this move, "it ceased to be a conventional paid television to become a digital entertainment brand that is transferred to all media" (El País, 2011a).

From 2015 to 2020, an unstoppable revolution began in the entertainment industry, driven by new business models, global players operating in all markets, and, above all, accelerated by the adaptation of audiences to these new viewing environments and changes in consumer habits.

In this sense, viewers no longer want to adapt their day to the traditional content lineup set by general television. Instead, they prefer to have control over both the content and the time and media of their enjoyment (Saavedra et al., 2021). Similarly, viewers are moving away from the realities that are still present in free-to-air television systems, such as the systematic delay of prime time and constant interruption of content due to advertising (De la Morena et al., 2018).

Today's viewer wants to have the ability to personalize their viewing experience by modulating the hours of exposure to the medium and deciding how they want to watch it, whether it be watching a single episode per week or binge-watching an entire season at once (Neira , 2021). To cater to this new empowered user, platforms rely on the use of artificial intelligence and recommendation engines that generate a personalized catalog of content that is more attractive to the subscriber (Clares-Gavilán et al., 2019).

The COVID-19 pandemic in 2020 accelerated the unprecedented consumption of online content, resulting in a transition from individual consumption to consumption across multiple platforms, breaking any tacit exclusivity with OTTs. This demonstrated that viewers would be willing to assume the cost of multiple platforms if the content offerings were attractive enough (Tuğce et al., 2022; Paun and Olsen, 2022).

SVODs are aware of the new type of empowered user they are facing and have been shaping themselves around three key pillars: subscriber financing, transnational reach, and on-demand access. These pillars are based on the absence of advertising, which is seen as the current enemy of the viewer. As a result, streaming platforms are sought out for a product experience without interruptions, which requires SVODs to create distinctive content for a mass audience that justifies the monthly subscription fee, with the financial costs that this entails (Lotz, 2023).

The opportunity created by the pandemic brought a new challenge for SVODs, in addition to other non-pandemic factors that have already accelerated the transformations of the cultural industries. One such factor is the conversion of the so-called GAFA or "the four" (Google, Amazon, Facebook, and Apple) into content producers and broadcasters. In 2017, GAFA generated a profit of 2,300 million euros (Galloway, 2018). Another factor is the growth forecasts for OTTs, which in Europe estimate an improvement in population reach from 23% to 40% from 2021 to 2030 (Future TV & Digital Content, Idate Digiworld, 2022). In Spain, the year-on-year growth of OTTs exceeds 8%. According to the CNMC household panel, in the second half of 2022, Netflix, HBO, Amazon Prime Video, and other paid platforms were used in 48% of households with internet access, which is 6% more than the previous year (CNMC, 2022).

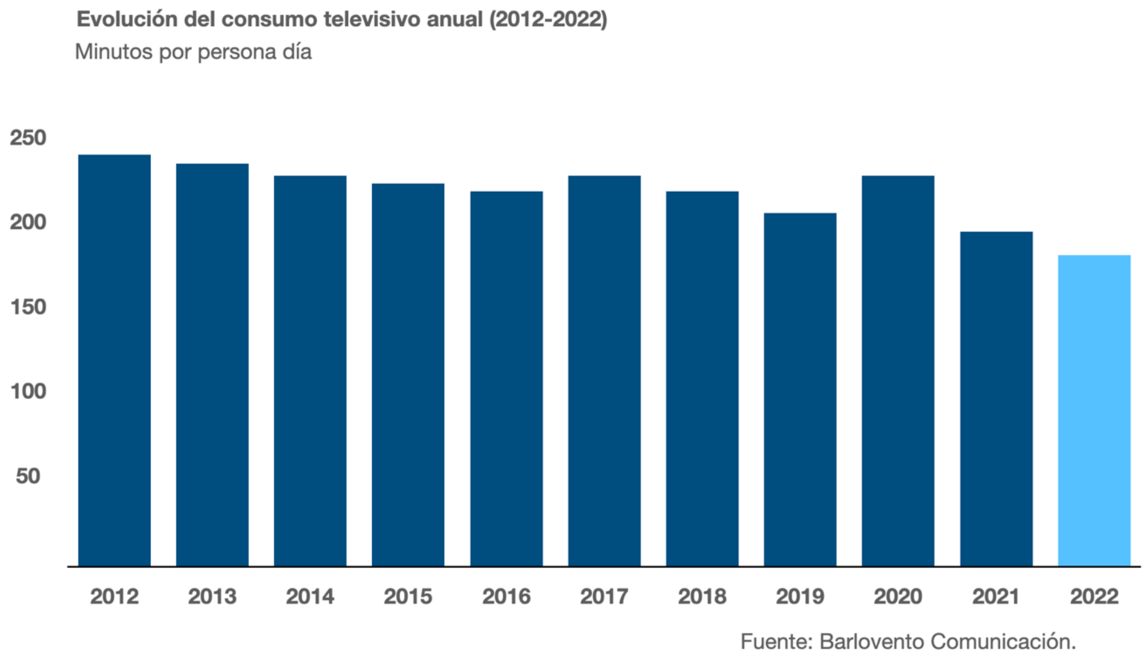
As a result, we can observe a national landscape that is rich in foreign streaming platforms that have entered the Spanish market, as well as domestic platforms seeking to expand globally. Spain has recently emerged as a significant hub for SVOD content creation, largely due to its language. According to Castro and Cascajosa (2023), Spain's position as a European country with a strong cultural and linguistic connection to Latin America has led to a growing demand for local content beyond Spanish borders.

This shift is pushing conventional players in the audiovisual market to come up with new commercial strategies, which require adapting to the changing environment and exploring new business opportunities, especially since advertising is continuing to reduce its investment in media. According to CNMC (2022), free-to-air television generated 7.1% less revenue in the second half of 2022 compared to the previous year, while paid television revenues increased by 2.5%.

After the reconfiguration of the audiovisual landscape caused by the health crisis, Spain begins 2023 leaving behind a year that has consolidated the hybridization of consumption and television models (ReasonWhy, 2023). Linear television consumption in 2022 decreased to an average of 190 minutes per person per day. On the other hand, 28,835,000 unique viewers were recorded in terms of accumulated audience, representing a decrease of 5.5% compared to the previous year (Barlovento Comunicación, 2023).

Figure 1

Evolution of annual television consumption in the last decade.



Source: Own elaboration based on Barlovento Communication.

Therefore, the main objective of this article is to analyze the current strategies of the main Spanish commercial television channels with regards to the exploitation of on-demand services and streaming content. Specifically, we focus on studying the Atresplayer and MiTele Plus platforms, which belong to Atresmedia and Mediaset, respectively.

2. OBJECTIVES

This investigation is based on the evolution that the main Spanish SVODs have experienced, from their respective births to their reconversion in recent decades until they established themselves in the industry in their current form. Focusing on Atresplayer Premium and MiTele Plus, we study two examples of innovation and change of models based on the projection of consumption.

As a consequence, our main objectives, focusing on the aforementioned platforms, are the following:

1. Approaching the origins of SVOD in Spain and analyzing the impact that international players have had on the national market.
2. Analyze the fundamental elements of their commercial strategy and understand how their channels have been established based on the demands of the industry, which are subject to change depending on the circumstances and adaptable to each period's contexts.
3. Observe the shift in consumption habits and establish a direct relation with the internal policies of the Atresmedia and Mediaset communication groups.

3. METHODOLOGY

To conduct this study, which aims to examine the adaptation of Atresmedia and Mediaset España to new business models and audiovisual viewing, the research is structured into three stages.

First, a descriptive study is conducted based on secondary sources that will help contextualize the object of study. Thus, the general framework for the implementation of paid audiovisual services in Spain has been presented in the introduction, as well as the keys to consolidating these platforms.

Secondly, already within the results of this research, an analysis of the Atresplayer Premium and MiTele Plus platforms is carried out, for which both primary and secondary sources have been used, as well as direct observation of the applications of the two main private chains in the country.

The third stage of this study involves conducting in-depth interviews with experts affiliated with both SVODs. This qualitative technique was chosen because there is no better way to confirm the impressions obtained from analysis than by listening to those responsible for the platforms. The interviews will help to expand upon information regarding the business model, subscriber attraction and retention strategies, and editorial and content approach currently being followed. These are, in fact, the thematic axes of the interviews.

It should be noted that this mixed work of content analysis and comparison of the conclusions with the authors through the in-depth interview is successful in other works that analyze the structural changes of the audiovisual industry (Gago et al., 2022; Formoso , 2022; Higueras et al., 2021; Gago et al., 2021; or, among others, Ortega and Santos, 2020).

Let us recall that according to Peña (2013), in alignment with Denzin and Lincoln (2000), the most appropriate approach for qualitative research is the use of in-depth interviews. Similarly, Ruiz-Olabuenaga (2012) upholds that it is the most suitable method to address divergent perspectives and impressions, obtaining information, and gaining a more intimate understanding of the attitudes held by the research participants.

In this way, wanting to study the business strategy of the two competitors of our -until now- television duopoly, two experts are selected who represent the two corporations and who meet three concurrent variables: belonging to the selected media (Atresmedia and Mediaset), direct involvement in the paid content strategy and more than five years of experience in the company they represent to be able to narrate the evolution of the market in this convulsive five-year period for the media. We present the interviewees below:

Figure 2

Interviewed representatives of Atresmedia and Mediaset: Emilio Sánchez Zaballos and Carlos Fernández Rodríguez.

Source: Author's own work from their CV's.

Following Ruiz-Olabuénaga's (2012) recommendations, the interview model used in this study adheres to the individual model, involving separate interviews with each expert. Additionally, it is monothematic in nature, as specific and closed interests were expressed during the interview process. The model is also semi-structured, as it began with predetermined thematic axes, but the experts were given the freedom to expand upon the information provided.

4. RESULTS

4.1. The case of Atresplayer Premium

4.1.1. Origin and development of the Atresmedia platform

The Atresmedia group launched Nubeox Premium in 2012, which was two years before the birth of MiTele. This platform was configured as "its new online video rental, purchase, and subscription platform" (Panorama Audiovisual, 2012). The portal had around 3,000 titles with the aim of "consolidating itself as the reference platform for online video consumption". However, just a year later, the same communication group launched another platform that was much more connected to its leading channel, Antena 3, and the rest of its extensions, thus differentiating it from Nubeox:

> Atresplayer is the new online platform for accessing the entire Atresmedia video and audio offer, as well as all the live broadcasts. With it, users will have the contents of television channels (Antena 3, laSexta, Neox, Nova, Nitro and Xplora) and radio stations (Onda Cero, Europa FM and , soon, FM Melody). (Audiovisual 451)

The group itself highlighted the differential characteristics of its SVOD in its Annual and Corporate Responsibility Report:

> The new platform includes the most innovative technical functionalities; The contents can be enjoyed in HD and HD+ quality that offer a much higher image quality than other online platforms. In addition, in some devices it is already possible to have Dolby Digital Plus sound providing a sound clarity that has never been broadcast online before. (Antenna3, 2013)

In just one year, Atresplayer Premium achieved its goals and "became the leading online TV platform in Spain with a monthly average of 2.5 million unique visitors/viewers," according to data from comScore (ObjetivoTV, 2014). However, the strategy of having both Atresplayer and Nubeox as separate platforms did not last long. It became clear that the parallel development of two platforms would not consolidate its offer and would divide its audience. At the same time, Nubeox began to face weaknesses as it was criticized for its limited content selection, high prices, and delayed releases. Even users who subscribed to the Atresplayer app noted "the continuous insertion of advertisements in the content" (Ford, 2013).

For the year 2015, the Atresmedia group recognized the need for a final merger of its contents. The CEO of Atresmedia Digital at the time, José Manuel González Pacheco, explained the merger:

> The incorporation of Nubeox into Atresplayer is a strategic move, but also a natural one within the group because with this merger we build a stronger and more competitive platform, with which we want to lead the digital world under a single brand. (Audiovisual 451, 2015)

In the following three years, Atresplayer, with all the content centralized, tried to survive with an imported catalog and the online upload of its traditional content. However, the strategy gradually became obsolete due to the new context that was taking place in our country. Netflix arrived in Spain in 2015 and HBO and Prime Video did the same in 2016. The international SVOD conglomerate was forced, once again, to make decisions.

In 2019, Atresplayer underwent a significant transformation and was rebranded as Atresplayer Premium. The primary objective behind this revamp was to showcase original content on the subscription platform and monetize the group's own series differently. While the initial impression might be that it was merely an update, the service offers a host of unique features such as previews of content before anyone else and original, exclusive shows like Veneno, the new series from Los Javis, El Knot, and more (Business Insider, 2020).Furthermore, Atresplayer Premium provides much of its content in 4K, the ability to download shows and movies to watch at the viewer's convenience, and Dolby Digital Plus sound quality (Business Insider, 2020). The subscription service was launched at a starting price of €2.99 per month and was renewed with a clear objective of surpassing competitors like Netflix and HBO (Pérez, 2020).

Its competitive pricing, coupled with the aforementioned features, has been the key factor behind the gradual rise in Atresplayer Premium's subscriber base. According to Oller (2022), as of early 2022, Atresplayer Premium boasted a subscriber count of 427,000, surpassing the 207,000 subscribers of its competitor, MiTele Plus.

Figure 3

Evolution of Atresplayer.

Source: Own elaboration based on Atresmedia.

4.1.2. Keys to the Atresplayer Premium content strategy. Interview with Emilio Sánchez Zaballos, head of Atresplayer Premium

Emilio Sánchez Zaballos, the expert representative of Atresmedia in this investigation, holds the position of manager of video and online platforms at the media company, thus responsible for its OTT service. Since its inception, Atresplayer Premium, the group's OTT platform, has prioritized "streaming in Lounge mode, including previews", according to Zaballos. Furthermore, he stated that "three years ago, we made a commitment to strengthening the distribution aspect." Zaballos believes that "technology is causing a shift in the ecosystem, and it is important for Atresmedia to be a part of it." To this end, the platform aims to deliver the content that users demand and want to consume.

And it's precisely on video-on-demand platforms where subscribers play an essential role in the decision-making process. As in traditional television, the audience has a crucial role in determining the success of the content on the programming grids.

The platform has a global audience perspective, given that it operates under a hybrid business model that integrates both open and paid services. As Sánchez Zaballos states, "if there are users who demand content that is not available on linear broadcasting and we can offer it to them for a fee, we have a Premium package for that." This approach remains a key element in adapting to the ever-changing technology and market demands.

When selecting content for the platform, a meticulous market study is conducted to assess the tastes and preferences of potential users. In many cases, the goal is to anticipate the needs of SVOD consumers by offering innovative content that resonates with them and motivates them to consume it. At the same time, a thorough review of the chain's content on its open channels is conducted to determine which content could be included in the OTT offerings.

According to Sánchez Zaballos, "there are certain series and programs that we may like a lot as a group, and we know that they work very well, but their place is not on general television with an editorial line and specific entertainment content." Based on these parameters, there are series or entertainment programs that would not fit into linear channels despite having a large niche, and yet examples such as "having brought Drag Race to Spain have been possible because Atresmedia has a paid platform like Atresplayer Premium."

Delving deeper into SVOD, it has two types of content: exclusive premieres, those that will be seen on linear channels and that are aired weeks, months, and even a year before their premiere, such as Los Hombres de Paco, Mentiras, or The Knot; and original premieres, which are produced exclusively to be viewed on the platform, such as Venom, The Bourbons: a Royal Family, or Luimelia.

However, it is true that there are exceptions — as in the case of Veneno — as the person in charge of Atresplayer comments, due to the fact that "in a product that works, by way of promotion, marketing, or special action, we decided to release a first chapter openly, with the aim of attracting a new public." "It is a strategy to attract new subscribers, but the production of Premium content is not designed for the open market because we want to take care of subscribers," he says.

One of the main objectives of the Over-The-Top (OTT) platform is to complement the products they already possess with original content that possesses a distinct local identity, "that is grounded in our knowledge, what is nearby, and what is national , but that has a global impact due to its meaning and stories, capable of traversing the world," as elucidated by the spokesperson. Furthermore, a third line of business is the sale of content to third parties. If the Veneno series is not displayed on the shelf, it is to maintain the respect for the subscribers who have paid their fees to enjoy the premium catalogue, but there exists the possibility of distributing it to other countries via the international sale of the product. Thus, this series has achieved worldwide success in the hands of HBO Max.

According to the head of Atresplayer, video-on-demand platforms and traditional or online channels coexist "with absolute normality and harmony" within the group since they coexist naturally, just as user consumption. The products are generally very similar, and there is a clear synergy in their distribution. Users seek content and not so much a different platform to watch it on. In fact, the spokesperson comments that "the user who sees La Voz or El Hormiguero is not thinking about where to see the product. The contents that are seen in the linear channels represent a great weight within the consumption of the platform."

In an effort to align with the audience's interests, they conduct market studies and exploit the data extracted from the platform. The primary objective of the San Sebastián de los Reyes platform is to anticipate the demands of the audience, and for this, "we tend to observe what interests society at all times and attempt to ensure that when a product is released, it is at a stage where the story has a place, that it will work according to the study, knowledge, and analysis," says Sánchez Zaballos.

In conclusion, it is imperative to emphasize the role that Atresplayer Premium plays in the group's business strategy. For Atresmedia, Atresplayer is an integral part of its chain's essence: "it is one more leg of your business." It remains a crucial component adapted to society's consumption patterns. The group's tasks are to generate production, distribute content, and provide entertainment and information. While the weight of traditional television remains high, the audiences state that "there are more and more people who want to consume on demand or consume the linear in other environments," as the spokesperson points out. Atresplayer is fundamental to the group's strategy.

4.2. The case of MiTele Plus

4.2.1. Origin and development of the Mediaset platform

Telecinco made its entrance into Spanish households as the second private television channel on March 3, 1990. The inaugural ceremony was hosted by the renowned artists Victoria Abril and Miguel Bosé.

In 2005, Canal+ was rebranded as Cuatro, which triggered a competition between the Mediaset group and the Telecinco and Cuatro channels to challenge Canal+'s established track record in the industry. As a result, Mediaset became the first group to launch a streaming and on-demand video platform in Spain, with the birth of MiTele in November 2011.

The development of MiTele was the cause-effect of the events that were beginning to shape the audiovisual market (El País, 2011):

> In response to the growing demand of users who seek to enjoy their favorite programs on the Internet whenever and wherever they want, the audiovisual group has concentrated a wide and attractive television offer with some of the most outstanding productions of its six channels now broadcast: Telecinco, Cuatro, La Siete, Factoría de Ficción, Boing and Divinity.

MiTele was created as an online television platform by Mediaset, with free access through computers, smartphones, and tablets. The platform aimed to gradually incorporate the most relevant series and formats from their channels. In the introduction, it is mentioned that the service was presented as a complement rather than a new line of business, and thus did not compete with new players in the market.

During its initial launch, MiTele offered nearly 700 hours of television content, consisting of successful Spanish series from their channels and foreign fiction obtained through agreements with other groups. Additionally, they added content for younger audiences. The platform was motivated not only by the existence of video-on-demand in the American market, but also by Spanish figures. In fact, a month before the premiere of MiTele, "12.2 million users used the Internet to follow Telecinco and Cuatro programs, according to data published by the Office for the Justification of Diffusion" (La Voz de Galicia, 2011).

Figure 4

Evolution of MiTele.

Source: Own elaboration based on Mediaset.

For almost ten years, MiTele remained a free content repository before transitioning into a paid OTT service in 2019 after two years of development. The switch to a subscription model came with an initial price of €2.5/month, optional football transmission for an additional fee, and ad-free content (Valero, 2019). The platform's update coincided with that of Atresplayer, its competing platform, which also underwent changes in 2019 to improve its offer, quality, and functionality, thereby gaining ground in the market.

4.2.2. Keys to the MiTele Plus content strategy. Interview with Calos Fernández Rodríguez, responsible for MiTele Plus

Carlos Fernández Rodríguez, an expert interviewed, is responsible for Mediaset's SVOD. Both MiTele and Atresplayer were born, as he comments, "in response to a growing demand from users who wanted to enjoy their favorite programs over the Internet." Initially, MiTele began its journey with 50 different titles and the "broadcasting of two channels in simulcast". Currently, the Mediaset España platform has 25,000 hours of content and they came to offer more than 20 live signals simultaneously.

The Fuencarral platform has evolved with the technology itself. Nowadays, these advances are reflected, as the expert says, in that "content can be served without latency, in HD and 4K, thanks to the exponential evolution of communications bandwidth, as well as the possibilities of distribution , becoming more and more relevant connected televisions".

For MiTele Plus, the role of the audience is vital since "it has a direct impact on the decisions we make every day about the development of the product and the content to include." For the Mediaset platform, what subscribers think is essential to work on the content they demand. "They are an advanced barometer to know to what extent the content that we incorporate into the platform can interest customers", commented the person in charge.

MiTele is currently developing a mixed business model. On the one hand, they continue to monetize content through digital advertising on the products they offer for free on their platform, and on the other, with the arrival of MiTele Plus, they offer their customers a premium subscription service without interruptions. All of this means, as Fernández explains, "the possibility of giving the user an experience that includes exclusive content, advanced functionality and much less content advertising."

The platforms are financially supported through several ways of income: through digital advertising (AdVOD) in all its formats (display, video advertising, branded content) or through subscription (SVOD) in which users pay a monthly or annual fee. , according to your preferences, to access the contents. "A third way to monetize is through rental or PPV (TVOD), in which the user pays only once to access content, usually movies for a limited time," he adds. “On our platform we have all three types.”

The content offered on MiTele Plus is closely related to Mediaset España's free-to-air channels. A study conducted by the network has revealed that the users of MiTele and those of its linear channels are very similar. As a result, MiTele Plus selects its content carefully. According to Carlos Fernández, "an important part of our premium content is previews of programs or series that can later be seen on television."

Carlos Fernández believes that SVOD and traditional media "are two services that coexist in parallel" but that in this case "both have a clear target to which they are directed." "Traditional platforms and channels complement each other and each platform was born as an exclusive SVOD service and right now they are increasingly considering opening up to AdVOD." “It is a model that Mediaset has been developing in the last three years with great success”, he acknowledges.

To understand the interests of their audiences, MiTele Plus relies on its Advanced Analytics and Business Intelligence departments, which "allow decisions to be made quickly based on continuous study of user and customer behavior." The platform also has a Customer Service department that provides essential information for understanding user satisfaction. Additionally, through social media, they foster constant interaction with customers, resulting in greater brand engagement.

As in the case of the previous platform, it is important to understand the significance of SVOD in the group's strategy. The intention of the company led by Paolo Vasile is to continue growing and evolving within Mediaset's global content distribution strategy. "The objective is to take on new challenges and opportunities that will mark the evolution of the market and streaming," as Carlos Fernández comments.

It should be noted that MiTele Plus is an independent business line within the Mediaset Group. This has resulted in a strong commitment to SVOD, a service that is gaining importance in Spain. Mediaset has embraced this business policy and "is committed to interaction with the user and extended content, with additional developments, premium events, live and exclusive channels, and applications that enhance user experiences."

Therefore, the synergy between the group and the platform is complete.

5. CONCLUSIONS

The transformation of the audiovisual consumption habits and the worldwide distribution of formats through streaming platforms with global reach is causing an unprecedented change in the history of television.

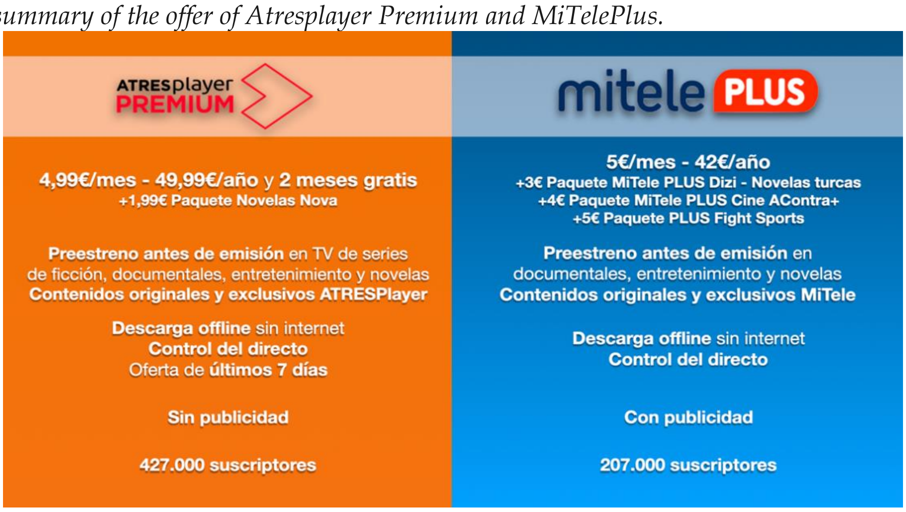
National free-to-air channels, which are privately owned and therefore have commercial interests, are threatened for the first time as previous payment formats did not reach a significant audience share or advertising investment, whereas the new players do have an impact on the market. When international SVODs arrived in Spain in 2015, the major free-to-air television groups, Atresmedia and Mediaset, attempted to halt the wave that was already transforming the American audiovisual sector, by trying to persuade the State to reverse the rules of the game.

The shift in audiovisual consumption habits and the distribution of formats through global streaming platforms is causing an unprecedented change in the history of television.

National free-to-air channels, privately owned and thus driven by commercial interests, are facing a threat they have never experienced before, as previous payment formats failed to capture a significant audience share or advertising investment. Meanwhile, new players are making a considerable impact on the market. When international SVODs made their way into Spain in 2015, major free-to-air television groups, such as Atresmedia and Mediaset, attempted to stem the tide that was already transforming the American audiovisual landscape, by lobbying the State to change the rules of the game.

Figure 5

Comparative summary of the offer of Atresplayer Premium and MiTelePlus.



Source: Own elaboration based on commercial information from the groups themselves and their respective platforms.

Both OTT platforms offer a free service with fewer benefits, and a paid service with different modalities that complements the open content. Initially, the starting price for both services was similar: Atresplayer Premium at 4.99 euros per month and MiTele Plus at 5 euros.

In the second paid section, Premium for Atresplayer and Plus for MiTele, the Atresmedia group chooses to unify its offer, presenting only one extension with its Soupoperas catalogue. On the other hand, Mediaset's extra content packages are more disaggregated, with profiles related to Turkish fiction, cinema, or sports.

During the development of this new business line and exhibition window, the Atresmedia platform has completely eliminated advertising, understanding that paid users also pay for this benefit. However, Mediaset is reluctant to remove ads between content, either at the beginning or during viewing.

At the subscriber level, as we have seen, Atresplayer is the platform with the most users of the two private ones and at the moment they are one of the references in the production and distribution of content at a local level due to their differentiating strategy. As we have verified, the figures are the result of its line of business: betting on new creators, with different languages that give diversity to the content and that are easily exportable to other markets. However, although Atresplayer doubles its counterpart, it has fallen compared to the figures for 2021 and MiTele has been narrowing the gap with its rival, better positioning itself in the market according to its previous data.

If we analyze the technical aspects, both MiTele Plus and Atresplayer Premium are at the forefront of technological advances, having adapted the structures of their OTTs, interfaces and displays to the user of 2022, already familiar with the consumption of this type of platform.

In both cases, for both business groups, the paid channel becomes a fundamental part of the company's strategy, which seeks to favor a new channel of monetization when facing a moment of falling advertising investment; also to attract new followers or retain the base audience, and finally, to improve the brand positioning and engagement with the audience. Also, in both cases, as in the rest of the audiovisual streaming strategies, the user is the key, and the data analytics part takes on special importance in creating a catalog that has to stand out within an immense sea of hours of fiction and TV entertainment.

Atresmedia, a priori, entrusts its premium content, above all, to fiction. It offers in advance on the platform the episodes of the most ambitious products of its first channel and also creates, produces, and broadcasts exclusive fictional content for its payment application. In contrast, Mediaset focuses, as in its main channels, on entertainment and tries to attract subscribers to its new business line by offering complementary and exclusive products related to the major reality shows it has on air (Saavedra et al., 2022), which still maintain very marked audience shares, being the only formats - excluding sports - that can currently exceed 20% of share (Montón, 2021).

Now, the competition for data and audience extends beyond the duopoly as the networks operate in a global market full of opportunities but also challenges.

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