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THE MIRAGE OF OVERPRODUCTION IN SPANISH CINEMA
A Critical Analysis of Audiovisual Policies and Their Impact

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ABSTRACT
Despite a stable market share, Spanish cinema experiences an overproduction that threatens its competitiveness. Through a comparative analysis of production, box-office, and genre data, this study demonstrates a critical gap between audiovisual promotion policies and market demand. Public subsidies are concentrated on genres with limited commercial appeal, overlooking the proven success of animation, thrillers, and comedies. It is concluded that the system must be urgently reformed, redistributing resources towards fewer productions with greater commercial viability to strengthen the sustainability of the industry.

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1. Introduction

The Spanish film industry currently finds itself in a paradoxical situation. On one hand, the market share of Spanish cinema fluctuates between 14% and 19%, a figure that could be considered relatively stable (Heredero, 2019). However, the number of annual productions has experienced a significant increase, rising from approximately 200 to 375 feature films per year in 2023 (Spain Audiovisual Hub, 2024). This rise in production raises serious questions about the sustainability and competitiveness of the sector. The latest Focus 2024 - World Film Market Trends report, from the European Audiovisual Observatory (2024), reveals that Spain currently surpasses countries such as Germany in the number of feature films produced. Nevertheless, these figures are not supported by an increase in production budgets (Pablo Martí and Muñoz Yebra, 2001; Spain Audiovisual Hub, 2023). This phenomenon, which we might term "overproduction," poses significant concerns regarding the sustainability and competitiveness of the national film industry.

The Spanish film industry has been the subject of numerous studies over recent decades, focusing primarily on aspects such as the historical evolution of Spanish cinema (Cánovas Belchí, 2024; Guarinos and Aubert, 2021; Gubern et al., 2009), audiovisual promotion policies (Álvarez-Monzoncillo and López-Villanueva, 2006; Heredero Díaz and Reyes Sánchez, 2017), and the challenges of distribution and exhibition (Carballo Sánchez, 2022; García Santamaría, 2015; Pérez-Rufí and Castro-Higueras, 2020). However, the specific phenomenon of overproduction and its implications for the sector's competitiveness have not been explored in depth.

This research aims to address the phenomenon of overproduction in Spanish cinema and its implications for the national film industry comprehensively. To this end, four objectives have been established to guide the study. Firstly, it seeks to conduct an analysis of the evolution of Spanish film production over the last decade (2013-2023), establishing a comparative framework with other European countries to contextualise Spain's position within the international landscape. This analysis will enable the identification of trends and patterns in national film production and its relative standing in the European context. Secondly, the research will focus on evaluating the impact of current audiovisual policies on the fragmentation and overproduction of Spanish cinema, exploring how regulatory frameworks and promotion strategies have influenced the proliferation of productions and the sector's structure. The third objective is to examine the relationship between the cinematic genres produced and their box-office performance, with the aim of identifying which types of films are achieving greater commercial success and how this aligns with production trends. Finally, based on the findings from the previous objectives, recommendations will be explored and proposed for an audiovisual policy that fosters the competitiveness and commercial viability of Spanish cinema, seeking a balance between cultural diversity and the economic sustainability of the sector.

1.1. Context and Evolution of the Spanish Film Industry

The Spanish film industry has undergone significant fluctuations in its production volume over the past decade, characterised by a trend towards the proliferation of low-budget projects (Morala Girón, 2023). This phenomenon has been particularly driven by the emergence of so-called "low-cost" cinema, which has facilitated the entry of new creators into the market but has also contributed to the fragmentation of the industrial fabric (Abuja, 2017).

The economic crisis of 2008 led to new production models (Oliver, 2017), creating a dichotomy between large-scale productions with commercial intent and an increasing number of low-budget films that explore alternative narratives and experimental formats (Altabás, 2014; Álvarez, 2021). The post-crisis period has been marked by the search for new cinematic languages, as evidenced, for example, by the emergence of "posthumor" as a cultural response to economic and social precarity (Morala Girón, 2023). This trend not only reflects an adaptation to budgetary constraints but also a transformation in modes of representation and the relationship with audiences.

On the other hand, international influence, particularly from the Anglophone world, has left a significant imprint on the production forms and narrative models adopted by contemporary Spanish cinema (Rodríguez González, 2023). This cultural hybridisation manifests itself in both formal aspects and production and distribution models.

The financial structure of Spanish cinema exhibits distinctive characteristics that have shaped its development over recent decades. The complex financing system of Spanish cinema has been marked by a notable dependence on public funding, though with significant differences compared to other

European countries such as France, where a more established and diversified model of industry support exists (Castillo, 2011). This dependence has sparked debates about the sector's sustainability and the need to seek alternative funding sources. The average budgets of Spanish productions have experienced a marked polarisation during the period 2007-2017, with a growing gap between large-scale productions and low-budget cinema (Díaz-González and González-del-Valle, 2021). This budgetary dichotomy has contributed to the atomisation of the sector, resulting in two clearly differentiated production speeds.

The economic crisis of 2010-2012 had a significant impact on film financing policies, necessitating a restructuring of state support mechanisms and the exploration of new funding formulas (Díaz-González and González-del-Valle, 2021). The tax incentive system, though improved in recent years, still shows notable differences compared to other European countries that have developed more attractive models for private investment.

The COVID-19 pandemic marked a new turning point for the Spanish film industry, generating structural transformations that have redefined production, distribution, and exhibition models. The pandemic drastically accelerated change processes already underway in the sector, particularly concerning release windows and consumption models (Formoso, 2022).

A highly significant aspect of this transformation was the reconfiguration of cinema's social functions during lockdown (García Benítez, 2022). Audiovisual consumption underwent substantial changes, with a notable increase in streaming and digital platforms, prompting a rethinking of traditional distribution strategies. The advent of 5G and the expansion of broadband have catalysed new forms of audiovisual production and realisation, giving rise to emerging languages and predominantly individualised consumption modalities (Moura, 2023). This technological evolution has been fundamental in the sector's post-pandemic recovery, facilitating innovative solutions for content production and distribution. The recovery period has been marked by considerable versatility in release windows and the emergence of new professional roles, particularly those related to health and safety on film sets. However, it is noteworthy that changes in production were primarily sanitary and temporary, while deeper transformations manifested in the areas of distribution and exhibition (Carballo Sánchez, 2022).

Lastly, the atomisation of the sector must be framed within a notable business fragmentation over the past decade, characterised by a proliferation of small production companies and low-budget projects that, while democratising access to cinematic creation, have also contributed to weakening the industrial structure. This atomisation is exemplified by phenomena such as the #Littlesecretfilm movement, which emerged in 2013, illustrating the trend towards low-cost production models (Loriguillo-López and Rubio Alcover, 2019).

Persistent structural imbalances in the production sector continue to hinder the consolidation of a robust film industry, manifesting primarily in excessive business fragmentation, economic weakness, limited presence in international markets, and weak integration between production, distribution, and exhibition sectors. This situation has led to a resizing of all sectors of the Spanish film industry towards a less ambitious scale, though potentially more sustainable given current economic realities (Pérez-Rufí and Castro-Higueras, 2020).

1.2. Framework of Audiovisual Promotion Policies

The financing and support system for Spanish cinema has undergone notable evolution over the past decade, characterised by a complex regulatory framework and various forms of public assistance. The foundational basis of this system lies in Law 55/2007 on Cinema (Castro-Higueras and Pérez Rufí, 2023), which establishes the guiding principles for the promotion of cinematographic and audiovisual activities. More recently, Royal Decree-Law 6/2015, of 14 May, which amends Law 55/2007 of 28 December on Cinema, introduced changes to the grant allocation models (Codes Calatrava, 2018).

The Institute of Cinematography and Audiovisual Arts (ICAA) serves as the central body for the management and distribution of support to the Spanish film industry (Lago, 2014). With the onset of the 2008 economic crisis, funding for cinematography was undoubtedly reduced. During the period 2013-2023, the budget allocated to grants has fluctuated considerably, reaching a peak in 2021 with 100 million euros, a notable increase from the 40 million euros of 2013 (ICAA, 2023b).

Support for production forms the cornerstone of the assistance system, divided into two main categories: selective grants and general grants. The former are directed towards projects of special cultural value, which can receive up to 800,000 euros per project, while the latter are based on objective criteria of business track record and commercial potential; commercial films are subject to maximum caps of 1.2 million euros per grant—1.4 million for animation films. This duality within the grant system has sparked debate within the sector, particularly regarding its effectiveness in fostering sustainable film production. On one hand, it is argued that selective grants are essential for preserving cultural diversity and supporting the creation of works that might otherwise lack commercial viability (Messuti, 2019). On the other hand, general grants are seen as a necessary mechanism to ensure the economic sustainability of production companies, enabling them to compete in an increasingly globalised market dominated by digital platforms such as Netflix (Bonilla-Ávila and Jauregui-Caballero, 2021; Gómez-Pérez et al., 2022).

The grant system has progressively incorporated criteria related to gender and sustainability. Since 2019, additional points have been awarded to projects directed by women and those incorporating environmental sustainability measures into their production plans (Coronado, 2022; Yébenes, 2022). This evolution reflects the adaptation of film policies to contemporary social demands.

Autonomous communities have simultaneously developed their own support systems, creating a multi-level network of assistance to the sector. Notable examples include Catalonia, the Basque Country, and Madrid, which have implemented audiovisual policies with varying outcomes in terms of industrial and cultural development.

The COVID-19 pandemic marked a turning point in support policies for the sector (Hernández, 2020). Extraordinary assistance measures were introduced, temporarily modifying grant allocation criteria and project execution deadlines for beneficiaries. These adaptations have left a lasting impact on the subsequent design of support policies, highlighting the need for flexibility in assistance mechanisms.

The financing model is complemented by the obligations imposed on television operators to invest in European production, as established in the General Audiovisual Communication Law (2022), which is fundamental to the viability of numerous film projects, though it has faced criticism for favouring certain more commercial production models.

1.3. Framework for Audiovisual Promotion Policies

Digital transformation has also brought profound changes to the film industry, redirecting not only production and distribution processes but also traditional business models (Heredia, 2017). Streaming platforms, for instance, have become major players in this new ecosystem, significantly altering the value chain of the audiovisual sector.

The shift in consumption habits, where audiences have progressively migrated towards digital consumption, with an increase in subscriptions to VOD platforms penetrating 78% of households (Andrade, 2022), compels the traditional film industry to analyse and rethink its distribution and exhibition strategies.

Digital platforms have not only transformed distribution channels (Izquierdo, 2009) but have also emerged as significant financiers of original content (Hidalgo, 2020; Gómez-Pérez et al., 2022). Investment in local production by these platforms has quintupled over the past three years, reaching 850 million euros in 2023. This new funding stream has created opportunities for national production but has also fostered dependencies in terms of intellectual property rights.

Furthermore, the horizon marked by the application of artificial intelligence to cinema—from the film's inception to its release and exhibition—is shaped by algorithms: analysing success patterns, identifying audiences and their preferences, examining demographic and audience data, crafting successful scripts, creating realistic worlds and settings, automating and generating movements and contexts for animated characters and props, selecting the best takes in editing and sound, ensuring precise lip-synchronisation, adapting character voices to the required language, curating music according to proposed narratives, and devising effective advertising and marketing strategies to diversify the film. This, in turn, raises questions about the safeguarding of intellectual property and copyright, where the human element remains essential to preserve the art of cinema (European Parliament, 2014).

2. Research methodology

This research employs a mixed methodology that combines quantitative and qualitative techniques to address the phenomenon of overproduction in Spanish cinema (Corbetta, 2007). The methodological design is structured in three complementary phases.

The first phase involves a longitudinal quantitative analysis of secondary data on Spanish and European film production (Hernández Sampieri et al., 2014). Variables such as the number of annual productions, box-office revenue, and audience figures are analysed, drawing on validated industry sources such as the annual reports of the Institute of Cinematography and Audiovisual Arts (ICAA), under the Ministry of Culture, reports and publications from the European Audiovisual Observatory, an entity of the Council of Europe, and Focus Reports from the Marché du Film at Cannes, covering the period 2013-2023.

In the second phase, a systematic content analysis of Spanish film production is conducted, categorising films by genre and production characteristics according to the methodology proposed by Casetti and Di Chio (2007). The variables analysed include: cinematic genre, type of production, budget, and box-office results. For this purpose, a sample has been compiled consisting of feature films exhibited post-pandemic between 2021 and 2023 with over 150,000 spectators.

The third phase comprises a qualitative analysis of current audiovisual policies, following the critical discourse analysis method proposed by Van Dijk (2016). This involves examining the Spanish audiovisual legislative framework, promotion policies and subsidies, relevant European directives, and strategic sector plans.

The triangulation of these three methodological approaches enables a holistic view of the studied phenomenon, combining academic rigour with the interpretative depth necessary to understand the underlying dynamics of the Spanish film industry.

The specific research objectives set out are as follows:

- SO1. Analyse the evolution of Spanish film production between 2013 and 2023, contrasting it with other European countries.
- SO2. Identify relationships between the cinematic genres produced and their box-office performance.
- SO3. Evaluate the impact of current audiovisual policies on the fragmentation and overproduction of Spanish cinema.
- SO4. Explore recommendations for an audiovisual policy that fosters the competitiveness and commercial viability of Spanish cinema.

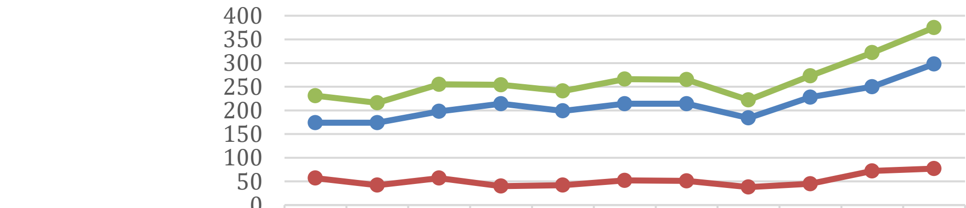
3. Results

3.1. Film Production

3.1.1. Production in Spain

Spanish film production (Figure 1) exhibits a clear upward trend over the past decade, with several notable highlights, such as sustained growth. A significant increase in total production is observed, rising from 231 feature films in 2013 to 375 in 2023, representing a 62.3% increase. The year 2020 marks the decade's lowest point with only 222 productions, reflecting the impact of the health crisis.

Figure 1. Film production in Spain between 2013 and 2023.



	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Spanish feature films	174	174	198	214	199	214	214	184	228	250	298
International co-productions	57	42	57	40	42	52	51	38	45	72	77
Total	231	216	255	254	241	266	265	222	273	322	375

Source: Authors´own elaboration based on data from the Instituto de la Cinematografía y de las Artes Audiovisuales (2013-2023).

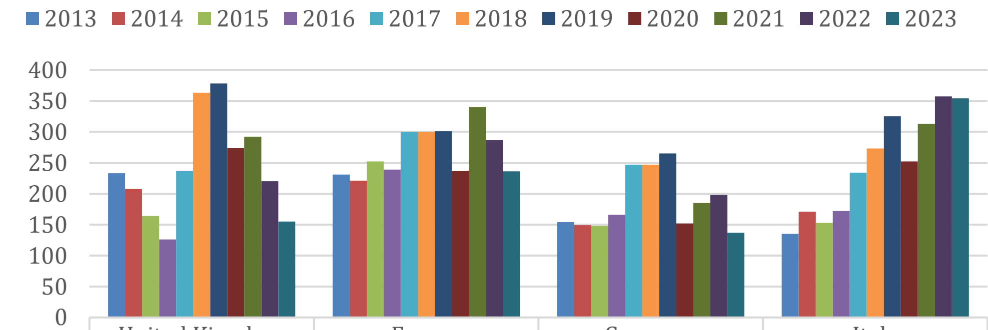
However, from 2021 onwards, a rapid recovery is observed, with notable growth culminating in 2023 with the decade's highest figure.

International co-productions have maintained a relatively stable trend until 2021, with a significant increase in the last two years, reaching 77 co-productions in 2023. As for entirely Spanish productions, these have experienced steady growth, particularly notable in the post-pandemic period, rising from 184 in 2020 to 298 in 2023.

3.1.2 Production in Europe

Analysing film production in the main European countries, we can observe different trends and developments in recent years (Figure 2).

Figure 2. Film production in the United Kingdom, France, Germany and Italy between 2013 and 2023.



	United Kingdom	France	Germany	Italy
2013	233	231	154	135
2014	208	221	149	171
2015	164	252	148	153
2016	126	239	166	172
2017	237	300	247	234
2018	363	300	247	273
2019	378	301	265	325
2020	274	237	152	252
2021	292	340	185	313
2022	220	287	198	357
2023	155	236	137	354

Source: Authors´ own elaboration based on data compiled by the European Audiovisual Observatory (2013-2023).

The United Kingdom exhibits an irregular trend with significant fluctuations, reaching its peak between 2018 and 2019 with 363-378 films. However, it has experienced a notable decline since 2020, dropping to 220 films in 2022. The average over the period is 260 films per year.

On the other hand, France maintains a more stable and robust production. Its range fluctuates between 221 and 340 films per year, reaching its maximum in 2021 with 340 feature films. The average over the period is 275 films per year. In terms of production, it is the most consistent country among the four analysed.

Germany shows an upward trend until 2019; however, following the pandemic, it suffers a significant drop in film production. Its production ranges between 148 and 265 films, with the peak reached in 2019 with 265 films. Since 2020, it has maintained more moderate levels (152-198 films). The average over the period is 180 films per year.

Lastly, Italy experiences sustained growth, rising from 135 films in 2013 to 357 in 2022. It displays the most clearly upward trend among the four countries. It only saw a significant decline in 2020 (252 films) due to the pandemic. The average over the period has increased progressively.

Overall, we can observe a clear general impact from the pandemic in 2020 and a subsequent uneven recovery depending on the country. France retains leadership in terms of volume and stability, while Italy demonstrates the most consistent growth. The United Kingdom presents the greatest volatility in its production data, possibly due to successive changes by the British Film Institute in measurement methods, including and excluding certain segments throughout the studied period. On the other hand, the German country maintains more moderate but stable levels.

3.2. Exhibition and Box Office

3.2.1. Cinema Screens in Spain

The analysis of exhibition and box-office performance over the period focuses on three customary variables: the number of screens, revenue, and audience volume (Table 1). Based on total figures, the data indicate that the sector experienced a phase of sustained growth during the period 2013-2019. Revenue increased steadily from 506.3 million euros in 2013 to reach its peak in 2019 with 614.7 million euros, representing a cumulative increase of 21.4%. Parallely, the number of spectators followed a similar trend, rising from 78.6 million in 2013 to 104.8 million in 2019, reflecting a growth of 33.3%.

Table 1. Data on screens, box office takings and cinema-goers in Spain

Year	Screens	Revenue			Spectators		
		Spanish feature films	**Foreign feature flms**	**Total**	**Spanish feature films**	**Foreign feature films**	**Total**
2013	3.908	70,15 €	436,15 €	506,30 €	11,01	67,68	78,69
2014	3.700	131,79	286,38	518,18	22,41	65,58	87,99
2015	3.588	111,73	463,51	575,24	18,57	77,57	96,14
2016	3.554	111,15	490,89	602,04	18,84	82,99	101,83
2017	3.618	102,97	488,32	591,29	17,35	82,45	99,80
2018	3.589	103,08	482,54	585,74	17,73	81,17	98,90
2019	3.395	92,19	522,56	614,74	15,87	89,02	104,89
2020	3.701	39,39	121,59	160,98	6,80	20,20	27,00
2021	3.625	29,69	212,25	251,94	6,73	35,00	41,73
2022	3.650	77,52	289,93	367,45	13,06	46,07	59,13
2023	3.608	82,36	410,67	493,03	13,43	63,28	76,71

Source: Authors´own elaboration based on data from the Instituto de la Cinematografía y de las Artes Audiovisuales (2013-2023). Note: Revenue in millions of euros. Viewed in millions of people.

Nevertheless, the year 2020 marked a turning point, a consequence of the pandemic. Revenue experienced an unprecedented contraction to 160.9 million euros (-73.8% compared to 2019), while the number of spectators dropped to 27 million (-74.2%). Paradoxically, the number of screens remained relatively stable, even registering a slight increase to 3,701 units. The period 2021-2023 is characterised by a gradual but consistent recovery. By 2023, revenue reached 493 million euros, approaching pre-pandemic levels, while the number of spectators stood at 76.7 million, indicating a substantial recovery, though still below 2019 figures.

The disparity between national and foreign cinema is notable. National film production reached its peak in 2014 with 131.79 million euros, whereas foreign productions achieved their maximum in 2019 with 522.56 million. This asymmetry reflects a consistent dominance of foreign cinema in the Spanish market, with an approximate 80-20 ratio in favour of international productions in the pre-pandemic years. The health crisis of 2020 affected both sectors disproportionately. Spanish cinema saw its revenue fall to 39.39 million euros (a 57% drop from 2019), while foreign cinema declined to 121.59 million euros (a 77% decrease). The subsequent recovery has been uneven: by 2023, Spanish cinema reached 82.36 million euros, while foreign cinema stood at 410.67 million euros.

The attendance pattern in Spanish cinema screens shows a similar trend. Spanish cinema recorded its highest attendance in 2014 with 22.41 million spectators, whereas foreign cinema peaked in 2019 with 89.02 million. The proportion of spectators maintains a distribution comparable to revenue, evidencing a clear preference among Spanish audiences for international productions. The post-pandemic recovery reveals that, in 2023, Spanish cinema attracted 13.43 million spectators (60% of its historical maximum), while foreign cinema reached 63.28 million (approximately 71% of its maximum).

3.2.2. Cinema Screens in Europe

The situation of cinema screens in Europe is marked by significant successes of American titles, despite the Hollywood writers' strike, ongoing conflicts in Ukraine, Russia, and the Middle East. Cinema admissions in the EU exceeded 998.1 million spectators, generating revenues of 7.3 million euros in 2023 (SGAE, 2023). At the same time, many European territories benefited from national releases, largely due to investments aimed at capturing diverse audiences. The German film *Chantal in Märchenland* (Bora Dagtekin, 2023) outperformed *Barbie* (Greta Gerwig, 2023) on its opening day, while *Un p'tit truc en plus* (Víctor Artus Solaro, 2023) recorded nine million tickets sold, surpassing the total audience of *Oppenheimer* (Nolan, 2023) in France. Market shares of national films have ensured box-office sustainability in countries such as France with 36.7%, Italy with 24.3%, and Turkey with 42.7%, despite the economic recession affecting the latter. One of the European films with the highest ticket sales in 2023 is the Spanish *Momias* (Juan Jesús García Galocha, 2023), with 4.4 million spectators, alongside the French *Astérix and Obélix: The Middle Kingdom* (Guillaume Canet, 2023) with 6.4 million, *Alibi.com 2* (Philippe Lacheau, 2023) with 4.5 million, and the Italian *There's Still Tomorrow* (Paola Cortellesi, 2023) with 4.9 million tickets sold.

Table 2. Distribution of film genres of feature films released in 2022 and 2023, by number of viewers

Genre	Number of films	Viewers
Comedy	13	6.904.194
Family (comedy)	8	6.651.209
Drama	9	2.526.028
Animation	2	1.938.984
Thriller	6	1.880.418
Horror	3	1.290.780

Source: Authors´own elaboration, 2025.

The analysis reveals a clear predominance of genres linked to comedy, which collectively (pure comedy and family comedy) account for over 13.5 million spectators, representing approximately 64% of the total audience in the sample. This dominance manifests not only in quantitative audience terms but also in the number of productions, totalling 21 titles across both categories.

The efficiency of the animation genre is particularly noteworthy; with just two productions—*Tadeo Jones 3* (Enrique Gato, 2022) and *20,000 Species of Bees* (Estibaliz Urresola, 2023)—it has attracted nearly two million spectators, evidencing a high performance per title. This suggests a potentially underexploited market niche in national production.

Drama, with nine titles, holds an intermediate position in terms of spectators (2.5 million), though its qualitative presence at festivals and awards typically exceeds its box-office performance. Thrillers, on the other hand, demonstrate notable consistency, with six productions achieving 1.8 million spectators.

The horror genre, despite its minority status in terms of productions (only three titles), has attracted 1.2 million spectators, indicating a favourable performance ratio per film, also suggesting a potential market niche for future productions.

In conclusion, it can be observed that since 2013, a sharp division has emerged between commercial Spanish cinema and Spanish auteur cinema; however, irrespective of this, an optimal response from Spanish audiences in cinemas is evident, with a 26% increase in attendance in 2023 compared to the previous year, the predominant narrative genre trends being comedy and thrillers. This division has developed throughout the history of global cinema, from the classical tradition established in the first fifty years with the exhaustion of the classic American musical, paving the way for the incorporation of avant-gardes and the new waves of Western cinema in the 1960s and the renewal and revolution of the musical category—*West Side Story* (Robert Wise, Jerome Robbins, 1960)—and thus to modern cinema. Postmodernism, with its blending of genres, introduced us to the disruptive decades of the 1970s and 1980s, where differentiation emerged in Italian and French films and the new cinema of Bollywood and Nollywood. This has inevitably led to a differentiation of cinema as entertainment, in some cases lacking artistic depth, characteristic of cinema that deeply reflects the director's artistic personality. The integration of cinema on television boosted spectacle cinema as an attraction, which later settled with the advent of the internet and streaming platforms.

3.4. Policies and Support for Spanish Cinema

To determine whether overproduction occurs in Spanish cinema, it is necessary to contextualise the support granted to productions, while also reflecting the trend towards making films with lower budgets. Consideration must extend beyond ICAA grants to productions, requiring a broader perspective that includes, for example, European funds managed by the Spanish Audiovisual Hub or support through tax relief and fiscal benefits for filming, with the Canary Islands serving as a prime example of regions transformed into filming hubs.

On the other hand, it becomes essential to analyse the loss of competitiveness in productions and its relationship with the budgets of commercial cinema. For over two decades, our country has prioritised a specific genre: comedy and family cinema. Apparently, comedy and family films generate substantial revenue, audience satisfaction in cinemas, and reduced costs; however, the confidence of investors in these genres is not always fully assured. The average production budget for a feature film has remained static over the years, representing a regression for the audiovisual film market, where spectators are drawn to American blockbusters. This has led to a collapse in larger Spanish productions due to stagnation in total production expenditure.

What might appear, based on these data, as an abundance of prosperity and growth in Spanish cinema paradoxically raises questions about the concept of overproduction. This is particularly evident when comparing results with countries like France, where only half as many films were produced in 2023. The low budgets under which productions operate necessitate subsidies or support to continue, alongside the sale of productions to television and platforms. Spain's production volume not only surpasses stronger film industries such as the French, but also the Italian and German ones. In 2023, Spain produced 375 films, compared to 137 in Germany and 236 in France. When extrapolating these figures to population sizes—Spain with 48 million, Germany with 84.4 million, and France with 68.1 million—the high level of film production and the existing overproduction in our country stand out.

The upward trajectory of animation is another example that helps elucidate policies and subsidy support. Animation cinema achieved one of its highest market shares since 2013 in 2023 (6.6 million euros out of 487.5 million euros globally, representing 8.12% of the total national cinema box-office revenue in 2023). This genre benefits from a very clear audience loyalty, with its exploitation divided between mainstream and independent cinema. Between 2014 and 2024, animation in Spain has generated 823 million euros, with box-office revenue exceeding 1,000 million euros, accounting for 18% of annual box-office takings (Spain Audiovisual Hub, 2024). In 2016, *Tadeo Jones 2: The Secret of King Midas* (Enrique Gato, 2016) grossed 17.9 million euros. It should be noted that the preceding years, 2014-2015, were challenging, with a decline in worldwide animation ticket sales, not only in Spain, despite standout titles like *Mortadelo and Filemón Against Jimmy the Creep* (Javier Fesser, 2014), which earned 4.6 million euros and 637,000 spectators. The Spanish-Chinese co-production, produced by Manuel Cristóbal and Larry Levene, *Dragonkeeper* (Salvador Simó, 2024), has placed in the top ten most-viewed animation films, grossing 1.9 million euros in its first week in cinemas.

Support also comes from television networks and their groups. Adult animation proved key in 2023 with *Robot Dreams* (Pablo Berger, 2023), nominated for the Oscars. The Bilbao native's film achieved "curious" results in our country, failing to exceed 110,000 euros with 175 distributed copies; however, it achieved significant revenue abroad, nearing ten million dollars in Mexico and China (BoxOffice España, 2024, p. 16). Despite Spain producing animation of the highest artistic quality, such as *Buñuel in the Labyrinth of the Turtles* (Simó, 2018), which did not surpass 55,000 euros, Disney and its films dominate the market share at 46.3%, equivalent to 73 million euros and over 11 million spectators (BoxOffice España, 2024, p. 19). *Inside Out 2* (Kelsey Mann) ranks as the fourth biggest commercial success in Spanish history, with 6.7 million spectators by the end of August. Santiago Segura represents the strongest bet for summer box-office success, as *Father There Is Only One 4* (Santiago Segura, 2024) attracted over two million spectators, alongside the animation film from Pedro Solís' studio, *Buffalo Kids*, which nearly reached 3.5 million euros (ICAA, 2024). These figures reveal a reduced impact of mid-range products, leading to scant revenue and causing instability in the Spanish market.

4.2. Regarding Cinematic Genres Produced and Box Office Performance

The analysis of genre prevalence in Spanish film production reveals a marked concentration on genres with high commercial appeal, primarily comedy and family animation. These genres not only dominate in terms of the number of productions but also lead in audience figures, accumulating over 13.5 million spectators, which represents approximately 64% of the total sample analysed. This trend suggests that Spanish production companies have directed their resources towards genres that ensure greater box-office profitability, possibly in response to market demands and prevailing promotion policies, through the concentration of support on these commercial genres.

The predominance of comedy, both in its pure form and its family variant, indicates a clear preference among audiences for light and accessible content. With a total of 21 productions across these categories, these films have succeeded in attracting a broad spectrum of spectators, translating into higher revenue. This strategic focus may be driven by the lower investment required to produce comedies, which reduces financial risk and facilitates a quicker return on investment. However, this concentration on commercial genres may limit the diversification of cinematic offerings and reduce space for more experimental genres or those with lesser commercial appeal, thereby affecting the cultural diversity of Spanish cinema.

On the other hand, the animation genre, with only two productions and nearly two million spectators, demonstrates high performance per title. This suggests a niche with significant growth potential that has yet to be fully exploited. Animation not only attracts a wide audience, including families and children, but also offers opportunities for export and penetration into international markets, where Spanish animated productions could compete favourably.

Although genres such as drama, thriller, and horror represent a smaller proportion in both the number of productions and audience, they present interesting dynamics worth noting. Compared to other European countries, where genres like drama and thriller maintain a more balanced presence in film production, Spain exhibits a distinct inclination. Countries such as France and Italy have successfully balanced the production of commercial genres with those of greater artistic value, enabling them to maintain a more stable market share. This highlights the need for Spain to reassess its approach to film production, seeking a balance that ensures economic profitability while also preserving diversity and artistic quality.

4.3. Regarding the Impact of Current Audiovisual Policies on Fragmentation and Overproduction

In the post-pandemic context, the genres that have demonstrated the greatest resilience at the box office are family animation, thrillers, and comedy. Recent productions such as *Inside Out 2* (Kelsey Mann, 2024) by Pixar or *Gru: My Villain Favourite 4* (Chris Renaud, 2024) exemplify this trend. However, a significant proportion of public support for Spanish cinema is allocated to intimate dramas, which typically have a limited run in cinemas. The causes of this situation can be attributed to audiovisual policies that have not adequately adapted to current market demands and have fostered the fragmentation of national film production. The current system does not appear to adequately recognise or incentivise the development of projects with greater commercial potential.

On the other hand, general support, intended to ensure the economic sustainability of production companies, has proven insufficient to counteract the growing number of productions, particularly in genres with low economic returns. This imbalance has led to the fragmentation of the sector, where numerous similar productions compete for limited resources, reducing investment in larger-scale projects that could offer greater commercial returns and enhance the international competitiveness of Spanish cinema.

The average budget per film in Spain has remained around 900,000 euros, a figure that has facilitated the proliferation of feature films but simultaneously limits the capacity of productions to achieve high levels of quality and competitiveness. This budgetary stagnation has prevented the realisation of films with greater investment that could attract wider audiences and generate higher box-office revenues. The ongoing reliance on subsidies and public support, without a proportional increase in budgets, has exacerbated the phenomenon of overproduction, creating a market saturated with productions lacking the resources to stand out.

5. Conclusions

The overproduction in Spanish cinema, though seemingly a sign of prosperity and growth, harbours serious threats to the sustainability and competitiveness of the sector. The disproportionate increase in production without a corresponding rise in market share reflects a disconnect between promotion policies and the true demands of the market.

The predominance of commercial genres has ensured a certain level of profitability, but at the expense of diversification and cultural enrichment, factors essential for global competitiveness. Furthermore, the influence of digital platforms has significantly transformed the landscape of financing and distribution, creating new opportunities but also new dependencies that must be managed strategically. The competition with more balanced and diversified film industries, such as those of France and Italy, underscores the urgency of reforming audiovisual policies to promote a more balanced and higher-quality production.

In conclusion, for Spanish cinema to not only maintain its production volume but also enhance its impact and competitiveness on the international stage, a profound restructuring of promotion policies is required. This restructuring must focus on a more strategic distribution of resources, the diversification of genres, the increase of average budgets, and the promotion of international co-productions, among other measures. Only through these actions can Spanish cinema overcome the mirage of overproduction and establish itself as a robust, diverse, and competitive film industry on the global scene.

Based on the results derived from the objectives of this research, a series of clear recommendations are proposed to reform audiovisual policies with the aim of fostering a more competitive and sustainable film production.

Firstly, consideration should be given to the strategic redistribution of resources, increasing the average budget per film to enable the realisation of higher-quality productions with international competitiveness, thus avoiding market saturation with low-budget films.

This entails a critical review of the distribution of public support, both at national and European levels, which currently favours genres with limited commercial potential. It is necessary to reassess the social and cultural profitability of productions that fail to connect with audiences, seeking a balance between artistic value and the economic viability of Spanish cinema.

This strategic redistribution could be complemented by a policy to strengthen international co-productions, promoting and facilitating bilateral co-production agreements with countries that have a strong presence in key markets, thereby enabling access to more diversified funding sources and greater international distribution.

Lastly, fostering collaboration between the public and private sectors is recommended, facilitating greater cooperation between public institutions and the private sector to create a more resilient and adaptable cinematic ecosystem, promoting strategic alliances that enhance the financing and distribution of high-impact productions.

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