

# Fundamental Changes in the Portuguese Television Ecosystem: Platformisation, Domestic Production Dynamics, and Reception

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# What is Crescine

An Horizon funded project dealing with increasing the future competitiveness of the European Film industry.

CRESCINE's overall objective is to enhance the competitiveness and cultural diversity of the European film industry by focusing on small markets.

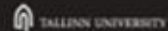
This will be achieved by understanding, engaging with, empowering, and ultimately transforming European small markets through original research and piloting the results in 7 countries.

The countries within our specific scope are Estonia, Lithuania, Denmark, Ireland, Belgium (Flanders), Croatia, and Portugal.

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## Portuguese Audiovisual? What is the audiovisual sector?

- Portuguese idiosyncrasy that implies a linguistic nuance that is extremely meaningful: in Portugal what is called anywhere else as “tv content” is referred to as “audiovisual content”.
- In formal contexts language needs to be “toned down” and the TV sector is called the audiovisual sector
- A similar situation happens with “telenovela” and “national fiction”

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## Framing the Portuguese Film and Audiovisual Ecosystem

- Small European Market, relies heavily on state-funding initiatives (both sectors)
- Television operates under a mixed model: public broadcaster and private media groups operate in FTA
- Two sectors with very distinct realities (e.g. volume of production, domestic market share, etc...)
- TV companies with strong ties to Brazil and the “telenovela format”
- Few players dominate the sector
- Characterised by problems with international circulation

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## Mapping the “Audiovisual” Ecosystem

- State-supported broadcaster: **RTP**
- Currently has 4 FTA channels in the Portuguese mainland
  - Held the “monopoly” until 1992
  - Its proprietary streaming platform can be accessed for free and without login with any IP address recognised from Portuguese territory
    - It is ad-free, does not profile viewers, and has a vast archive, going back decades. Also contains some third-party content.

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## Mapping the “Audiovisual” Ecosystem

- Private Media Groups: **SIC (channel 3) and TVI (channel 4)**
  - Each one only has one FTA channel, but substantially more cable channels
  - There are several other players (cable), but with very reduced artistic/cultural output, since they run mainly news/sports/niche channels
  - Both SIC and TVI have streaming services/platforms (Opto and TVIPlayer).  
Incipient stage. Content is behind a paywall and the both possess algorithms and track viewership. They contain some third-party content, but are no real competitors against majors like Amazon, Netflix, Disney, or MAX.

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## Mapping the “Audiovisual” Ecosystem

- Since the 1980s the whole daily programming (linear TV) has revolved around the soap operas in the evening, with longer commercial breaks. More recently, around some humour shows, reality TV and talent shows (especially on Sunday night)
- Soap operas began to be aired during “prime-time” only, now 4 to 5 different soap operas can be aired each day, on each channel.
- SIC has held a deal since the 1990s with Globo (the Brazilian giant)
- Against all odds and through a structured process, TVI managed to operate a major sea change: in the mid-2000s its domestic product overthrew the Brazilian one



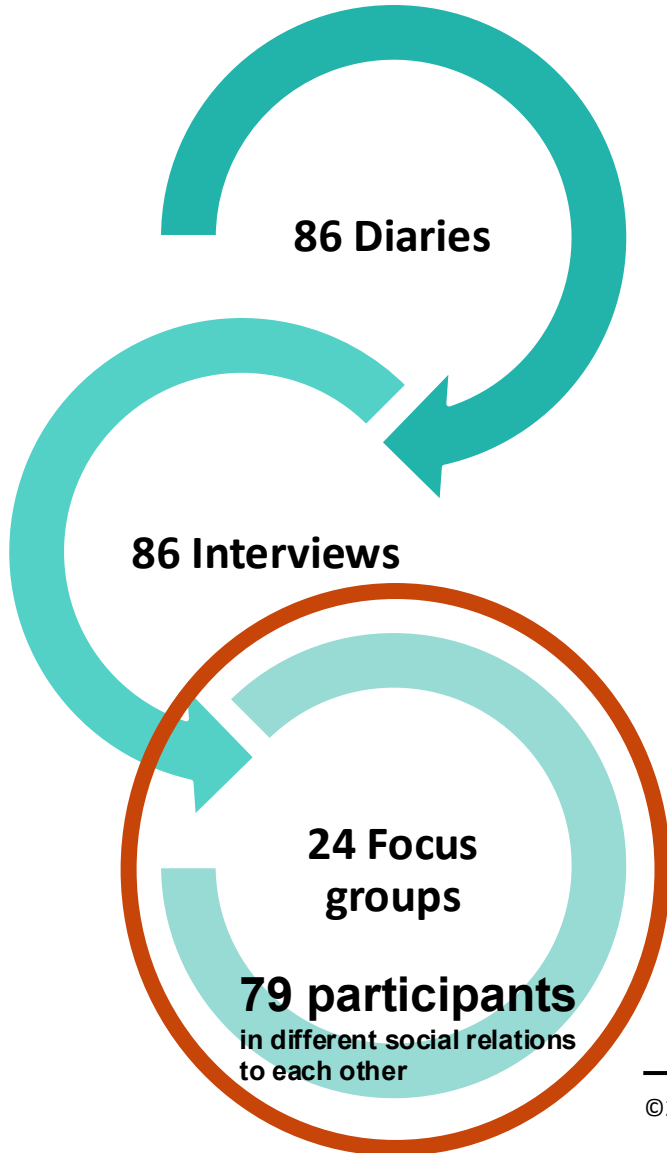
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## Mapping the Streaming Ecosystem

In addition to the local channels and their platforms, there are several other subscription services with their own platforms and catalogues.

- Netflix, HBO/MAX, Disney+ (subscription only)
- Amazon Prime, Apple TV, Filmin (art-house cinema), SkyShowtime, MUBI and Rakuten TV (subscription and pay-per-view)
- The overwhelming majority of the Portuguese has cable TV (it is bundled with internet by comcast operators). Sometimes cross-subscription to SVOD is offered
- Yet, about 42.2% of the Portuguese have at least one active subscription

## Understanding European small markets' domestic audiences



- 24 FGs explored the role of sociality for (domestic) film viewing
- Participants' group-based film consumption can be understood as a specific, situational taste community that is not aligned with what people watch on their own and (domestic) films are quickly assessed based on whether they are likely to fulfill the group's situational needs
- The stakes of recommending a (domestic) film to friends can be too high if no sufficient information (incl. Previous experiences) is available
- Discounts or memberships acted as catalysts for social viewing in the cinema.

- **Group tastes/practices differ** from individual behaviour
- **Situational group needs** & dynamics determine film choice above all else (e.g. practicalities, mood-management, relationship work, shared rituals, cinephilia, pleasure or fan cultures)
- Suitability for the given group situation is **quickly** assessed, based on a broad **variety of markers** depending on group, social situation and viewing mode (e.g. genre, convenience, artwork, blurbs, awards, trailers, imdb, previous experiences with the very film or its creatives...).

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## Implications

- Sociality can push domestic film and (temporarily) **change/shift individual consumption profiles**, but such leverage can only be achieved if audiences can see how their group-needs can be met by domestic film
- Special (event) programming, bringing film into social settings, memberships, **diversified marketing**, and a **balance between broad and niche targeting** (of films and marketing) could help to support the power of sociality

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## Aspects to consider: Price-point

- The price of subscriptions has been rising since the majors entered the market in the mid-2010s. However, a monthly subscription is usually cheaper than a double ticket for a single film.
- Admissions for theatrical screenings are notoriously high in Portugal, making a subscription for various devices and members of the same family seem in perspective like a good value proposal
- The social element: content in SVOD platforms is now as much anticipated and part of the conversation as content that circulates in theatres or is broadcasted on TV

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## Final Remarks– The platformisation of television

- TV products, even domestic ones, are starting to adhere to the marketing logic of platforms: e.g. subscribers get the chance to view the shows earlier, without commercial breaks, as well as extra content (extender versions, making of, etc...)
- Platform as teleology: some shows that are aired on TV are narratively structured, designed and aesthetically conditioned to be made available on multi-screen platforms
- Due to regulations, SVoD platforms must have EU and domestic content. Often the same products are available across several providers, meaning that there is an unequal distribution of attention to certain domestic products over others

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## Final remarks

As we progress into the era of platformisation and algorithms, enquiries must be framed and reframed. Going back to the basics is sometimes a necessity

Portuguese television is changing (fast) and needs to be properly researched. Not only for local cultural reasons, but also due to for being a paradigm of an ecosystem from a small European country

The market and regulation are leaving us with a situation that seems unsatisfactory to everyone: this should also motivate further investigation