

IBERO-AMERICAN OBSERVATORY OF TELEVISION FICTION

# OBITEL 2018

## Ibero-American TV Fiction on Video on Demand Platforms

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## PRESENTATION

This Yearbook is a result of a partnership that started in 2008 between Globo and the Ibero-American Observatory of Television Fiction (Obitel). The Observatory, which in 2018 publishes its **12<sup>th</sup> yearbook**, aims to monitor and analyze TV fiction production, audience and sociocultural repercussion in Latin America and the Iberian Peninsula, throughout publications and seminars.

### **Publications:**

- *Obitel Yearbook 2007: cultures and markets of Ibero-American television fiction*
- *Obitel Yearbook 2008: global markets, local stories*
- *Obitel Yearbook 2009: television fiction in Ibero-America: narratives, formats and advertising*
- *Obitel Yearbook 2010: convergences and transmediation of the television fiction*
- *Obitel Yearbook 2011: quality in television fiction and audience's transmedia interactions*
- *Obitel Yearbook 2012: transnationalization of television fiction in Ibero-American countries*
- *Obitel Yearbook 2013: social memory and television fiction in Ibero-American countries*
- *Obitel Yearbook 2014: transmedia production strategies in television fiction*
- *Obitel Yearbook 2015: gender relations in television fiction*
- *Obitel Yearbook 2016: (re)invention of TV fiction genres and formats*
- *Obitel Yearbook 2017: one decade of television fiction in Ibero-America. Analysis of ten years of Obitel*
- *Obitel Yearbook 2018: Ibero-American TV fiction on video on demand platforms*

**About Globo:**

In addition to publications, Globo supports researches and promotes courses and seminars in partnership with Brazilian and foreign institutions on topics considered relevant to society in the areas of communication, arts, management, technology and citizenship.

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## EDITOR'S NOTE

This Obitel Yearbook 2018 is published concomitantly in three languages by Globo/Editora Sulina (Brazil): in printed and digital form bilingual (Portuguese/Spanish), and in digital form in English.

Former Obitel Yearbooks:

- *Obitel Yearbook 2007*, published in Spanish by Editorial Gedi-sa, Spain.
- *Obitel Yearbook 2008*, published in Portuguese and English by Globo Universidade, under the seal of Editora Globo, Brazil.
- *Obitel Yearbook 2009*, published in Spanish by the European Children's Television Observatory (Oeti); in Portuguese and English by Globo Universidade/Editora Globo, Brazil.
- *Obitel Yearbook 2010*, published in printed form in Portuguese and Spanish by Globo Universidade/Editora Globo, Brazil.
- *Obitel Yearbook 2011*, published by Globo Universidade/Editora Globo in printed form in Portuguese and Spanish, and in digital form in English.
- *Obitel Yearbooks 2012, 2013, 2014, 2015 and 2016*, published by Globo Universidade/Editora Sulina in printed form in Portuguese, and in digital form in Spanish and English.
- *Obitel Yearbook 2017*, published by Globo Universidade/Editora Sulina in printed form in Portuguese and Spanish, and in digital form in English.

Since its inception, in Bogotá, in 2005, Obitel elected the centrality of television fiction production in Ibero-America due to the growing interest of different countries in conflating a number of policies involving production, exchange and creation of distinctive media, artistic, cultural and commercial products. Thus, in face of the constitution of a major geopolitical and cultural zone, Obitel performs not only the quantitative record of fiction production in the



12 countries, but also the analysis of programming trends, broadcast television and the analysis of television fiction transmedia reception.

In the course of these 13 years of history, Obitel has consolidated in the field of Ibero-American communication as an international research network, which produces and intersects quantitative and qualitative analyses with the purpose of identifying similarities and specificities, adaptations and also appropriations among several national television narratives produced and exhibited in the region. It is, therefore, an intercultural and comparative study that allows identifying and interpreting points such as: the representations these countries make of themselves and of others through fictional television productions; cultural indicators through which these countries build and rebuild daily elements of their cultural identity. These approaches facilitate the Observatory to build, at the same time, a comprehensive overview about the economic strength that fiction has gained in the television and in the life of these countries.

On the other side, it is necessary to point out the construction and improvement of a unified methodological protocol adopted by all Obitel teams during 13 years of the yearbook. This protocol integrates techniques of observation and data collection, procedures and patterns of quantitative and qualitative analysis, which enables researchers and communication professionals to have a synchronic and diachronic vision of the transformations undergone by television industries in the Ibero-American context.

A result of all this continuous and coordinated work carried out by Obitel has been the **historical series of data and analysis**, which is rarely achieved in the field of research. Equally important has been the **collaboration between the university and the productive sector**, a relationship that is renewed every year, demonstrating that, if desired, the alliance of interests around the study of our main TV product is possible, which is the telenovela and its derived formats.

For all this, throughout 13 years of Obitel, the general and national coordinators and the research teams reaffirm their commit-

ment with the improvement of knowledge on television fiction, with the qualified formation of its researchers and professionals, with the application and intervention of this knowledge in promoting TV fiction, which increasingly speaks as the narrative of the Ibero-American nations.

General and national coordinators of Obitel once again wish to express our appreciation to Globo for its continued support over these years and its decisive involvement in this publication and the realization of our annual seminar. We also reiterate our appreciation for the cooperation received from institutes Kantar Ibope Media (Argentina, Brazil, Chile, Colombia, Peru, Uruguay), Nielsen-Ibope-México (Mexico), GfK/Caem and Marktest (Portugal), Barlovento Comunicación/Kantar Media (Spain), Nielsen Media Research (United States, Venezuela). Finally, our deepest gratitude to all the universities and research centers of the countries members of Obitel for their support and collaboration to their national teams.



## NOTE ON METHODOLOGY

The IBERO-AMERICAN OBSERVATORY OF TELEVISION FICTION – OBITEL, since its foundation, in 2005, works as an intercontinental project for Ibero-America, including Latin American and Iberian countries, besides the United States Hispanic population. As at the time, it is considered important to speak of an Ibero-American context due to the growing interest of different national states in conflating policies of production, exchange and commerce, and of media, cultural and artistic creation, which could cooperate to constitute a major geopolitical and cultural zone.

The studies that have been carried out by Obitel comprise at least five dimensions of television fiction as its vast object of analysis: production, exhibition, distribution, consumption and thematic content. To these dimensions, the phenomenon of “transmediation” has been added since 2010, which, while emerging, carries a high potential for understanding TV production and the expectations, distribution and consumption of TV fiction. With this analysis we intend to explain the new forms in which the audiences relate with television fiction – now also watched and consumed on the internet or on mobile devices, such as smartphones, laptops, tablets, etc.

In the Obitel Yearbook 2018, we continued the same line of research from previous years, focusing on the analysis of transmedia TV fiction in the Obitel countries, this time also looking at video on demand (VoD) platforms. The methodological work for that has been mainly:

- 1) Systematic annual monitoring of the fiction shows that were broadcast by free-to-air TV channels in the 11 Obitel countries that took part of this Yearbook.

- 2) Generation of comparable quantitative data from these countries: rating and share, premiere shows, number of hours, titles and chapters, audience profiles, and the central fiction themes.

3) Identification of plural and bilateral flows of fiction genres and formats, translated in the ten most watched productions, their central themes, rating and share.

4) Analysis of trends in the audiovisual context of each country: data of consumption of other media, such as the internet, and other program genres, investments in advertising, legal and political events of the year, as well as what each national research team considers the highlights of the year, especially regarding to changes in production, narrative aesthetics and thematic contents.

5) The analysis of transmedia reception and the interactions of the audiences with fiction in every country; case studies considering the TV shows that, due to their singularity, have had great repercussion on the internet or on social networks.

6) The proposal for a study theme that takes the 11 groups to a theoretical and methodological integration around it, whose result is intended to be a unique contribution of *Obitel* to television fiction studies, under the title of the **theme of the year**.

7) The publication of the results of the systematic monitoring as yearbook, with special attention to one theme. The theme of the year for the *Obitel* Yearbook 2018 is “**Ibero-American TV fiction on video on demand platforms**”.

Our monitoring was carried out by research teams from 11 countries and different universities from the Ibero-American region: Argentina, Brazil, Chile, Colombia, Spain, United States, Mexico, Peru, Portugal, Uruguay and Venezuela.

The main sources of audience data have been granted in the different countries by: Kantar Ibope Media (Brazil, Argentina, Chile, Colombia, Peru, Uruguay), Nielsen Ibope México (Mexico), CAEM, GfK and Marktest (Portugal), Barlovento Comunicación and Kantar Media (Spain) and Nielsen Media Research (United States, Venezuela). The work has also been done with data generated by the proper research teams from other sources, such as press releases, websites information (clippings), audio and video materi-

als, as well as those derived from direct contacts with agencies and agents of the audiovisual media in each country.

The data statistical treatment was carried out according to *productive typologies* (programming grids, time slots, duration of each fiction, chapters or episodes) and *measuring typologies* (audience rating and share). It makes possible the creation of comparative tables on the offer conditions and the production profiles of television fiction in each country, which include such categories as: programs data, formats, producers, scriptwriters, creators and exhibition strategies.

This Yearbook is divided into three parts. The first is an **introduction chapter**, containing a **comparative synthesis of fiction in the Obitel countries**. This comparison is made from a quantitative and qualitative point of view, which makes possible to observe the development of fiction in each country, highlighting their main productions, as well as the theme of the year.

The second part consists in **11 chapters**, one for each country, with an internal structure of fixed topics, but with new additions every year. The sections that compound each chapter are the following:

1) **Country's audiovisual context**: this section presents general information about the audiovisual sector regarding the production of television fiction, such as history, trends and relevant events.

2) **Analysis of premiere fictions**: it is made through quantitative tables that show specific data about national and Ibero-American TV fictions released in each country. In this section the **ten most watched titles of the year** are highlighted. Since 2017, the Yearbook also brings the **five most watched national productions of the year** in an effort to enhance and deepen the issue of national identities in each country.

3) **Transmedia reception**: this section presents and exemplifies what channels offer to the audience fiction on the internet, as well the description of the audience's behavior when watching, con-

suming and interacting with their fictions through websites, social networks and other platforms.

4) **Highlights of the year:** the most important productions not only in terms of audience (rating), but also for their sociocultural impact and for generating innovation in television fiction production or reception.

5) **Theme of the year**, which this year is **Ibero-American TV fiction on video on demand platforms**. This theme converges with the interests of *Obitel*, which for years has been following the trajectory of Ibero-American television fiction by rapidly changing scenarios. Multiple screens, transmissions, new formats, pay TV, UGC, among other topics, have been monitored and analyzed theoretically by each *Obitel* country research group. In this Yearbook, the proposal is to discuss production on video on demand platforms (VoD), addressing new forms of distribution and consumption.

The objective was to verify the panorama of VoD production and consumption in the *Obitel* countries and the presence of national fiction on these platforms. In order to do so, we attempted to identify the reconfigurations that are occurring in the television scenario of each country in the face of new platforms of production, distribution and audiovisual consumption. Such reconfigurations take place from production to reception, from narrative forms to business models, to debates on legislation and regulation.

The qualitative analyses of each country were based on the local scenario and address issues such as: marketing strategies of the channels that offer their content on demand, new business models stimulated by the deployment of VoD in the country; spaces for alternative production (independent production webseries, or exclusive co-productions for the internet); production, sharing and interaction of fans, especially on YouTube.

The third part is an **appendix** that brings **the technical specifications of the ten most watched titles** in each country, with the basic necessary information about these productions.

# FIRST PART

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TELEVISION FICTION IN THE IBERO-AMERICAN SPACE IN 2017





# COMPARATIVE SYNTHESIS OF OBITEL COUNTRIES IN 2017

*Authors:*

Catarina Duff Burnay, Pedro Lopes, Marta Neves de Sousa

The first part of this Obitel Yearbook is formed by a comparative and synthetic overview of the main data monitored in 2017 on the production, circulation and reception of new fictional TV shows airing in Ibero-American countries. This data is the result of the mapping carried out last year by the Obitel research teams.

For the present yearbook, several TV shows were monitored, shows from open channels – both private and public – with national reach, in 11 out of the 12 countries that form the geocultural scope of the Observatory.<sup>1</sup>

**Table 1. Obitel countries and channels analyzed in 2017<sup>2</sup>**

Obitel countries	Private channels	Public channels	Total
<b>Argentina</b>	América 2, El Nueve, Telefe, El Trece	TV Pública	5
<b>Brazil</b>	Globo, Record TV, SBT, Band, RedeTV!	TV Brazil, TV Cultura	7
<b>Chile</b>	UCV TV, Canal 13, Telecanal, La Red, Chilevisión, Mega	TVN	7
<b>Colombia</b>	RCN, Caracol, Canal Uno	Señal Colombia, Canal Institucional	5
<b>Spain</b>	Antena3, Tele5, Cuatro, LaSexta	La1, La2	6 <sup>1</sup>

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<sup>1</sup> Obitel is composed by 12 countries, however, this year, Ecuador was unable to perform the analysis and be a part of the yearbook. This fact impacts the comparative overview in a three-year period (2015-2017), wherefore, anytime there is a need, a further explanation will be handled.

<sup>2</sup> Spain has over 30 autonomous TV channels, not analyzed in this comparative chapter, which includes only the broadcasters with national reach from each country. In the Spain chapter of this yearbook, most part of those regional channels can be found.

<b>United States</b>	Azteca America, Estrella TV, Tel-emundo, UniMás, Univision	-	5
<b>Mexico</b>	Televisa, TV Azteca, Imagen TV	Once TV, Conaculta, Una Voz Con Todos	6
<b>Peru</b>	Frecuencia Latina, América Televisión, Panamericana Televisión, ATV, Nextv	TV Peru	6
<b>Portugal</b>	SIC, TVI	RTP1, RTP2, RTP3, Canal Parlamento, RTP Memória	7
<b>Uruguay</b>	Montecarlo TV, Saeta, Teledoce	Televisión Nacional del Uruguay (TNU), Canal de la Intendencia de Montevideo (TV Ciudad)	5
<b>Venezuela</b>	Canal I, Globovisión, Meridiano Televisión, Televen, TV Familia, Vale TV, Venevisión	Colombeia, VTV, ConCien-cia TV, TVES, Corazón Llanero, TV Fanb, C.A. Tele Sur, Vive TV	15

From 2016 to 2017 we can see a decrease on the sum of the number of channels (from 80 to 74<sup>3</sup>) as a result of the changes observed in four countries: in **Brazil** a new public channel was born (TV Cultura); in the **USA** a commercial channel was shut-down (Mundo Max) and the public channel changed its status; in **Portugal** both news channel RTP3 and RTP Memória became available free-to-air; and in **Venezuela** a new public TV channel, called Corazón Llanero, was born, with programs strongly linked to the folklore of Los Llanos region. Generally speaking, a domain of private channels over public channels can be observed. However, in **Portugal** the tendency is the exact opposite (five public channels to two private channels), as a result of the transition to the digital terrestrial television (DTT).

## 1. Audiovisual context in Obitel countries

### 1.1 Audience's panorama

The audience in the free-to-air TV channels has either shown, in comparison with 2016, a tendency to decline in most countries

<sup>3</sup> While the sum of Ecuadorian channels was not determined, there were alterations in the rest of the countries, which made total sum of all countries change.

(**Argentina, Chile, Peru, Portugal, Mexico, Uruguay and Venezuela**) or a slight oscillation (**Colombia and United States**), with **Brazil** and **Spain** sticking out for their positive performance – with the interruption of the growth of pay TV in **Brazil** and with the increase of television consumption and great performance from some public channels in **Spain**. The genres that are mostly offered by the broadcasters are consensual in the Obitel countries, with news, fiction and entertainment taking the first three spots in the table, as well as a strong presence of sports in **Mexico** and **Spain**. **Chile, Spain, United States, Peru** and **Portugal** were the countries broadcasting a high number of fictional content, with **Portugal** broadcasting about 7 thousand hours and **Peru** almost 20 thousand.

The consumption of content on demand, streaming and digital platforms fluoresced in 2017 across countries, particularly amongst the younger generation. We can separate the countries in two groups, according to the dynamics adopted, taking into account, however, the different speeds of implementation and consumption. In the first group of countries, we have the ones where digital has emerged and/or became significant: **Colombia, Chile, Peru, Portugal, Uruguay** and **Venezuela**. In a second group of countries, we have the ones where digital supply and consumption have reached a point of consolidation: **Brazil, Spain, United States** and **Mexico**.

## 1.2. Advertising investment of the year: in TV and in fiction

Despite the decrease of audiences in most of the Obitel countries and the reshaping of the audiovisual panorama, TV is still the preferred medium for advertising investment. In **Argentina**, 36% of the investment went to television, while **Brazil** and **Portugal** registered the highest numbers of all countries, with 67% and 79% respectively. **Colombia** has seen a rise of its television advertising investment thanks to an increase of fictional content. In **Spain** an increase in investment was also observed for the fourth year in a row; and in **Uruguay**, while a slight decrease in investment can be observed, television is still the main chosen medium by advertisers and

brands. In the remaining Obitel countries, we can observe a different scenario, with **Chile** suffering from a fall of 26.6% when compared to 2016, with **Peru** registering the lowest numbers in terms of investment of the last five years, and the **United States** compensating the fall with money from the Olympic Games in Brazil. The advertising industry in **Venezuela**, following the same tendencies of 2016, has suffered the consequences of the economic crisis that affected the country, and predictions are that, in time, activities will decrease, markets will be lost, and businesses, either advertising or communication agencies and production companies, will close. In general, however, a growth of advertising investment can be observed, particularly in **Mexico**, which registered, in 2017, an investment quote superior on the web than on TV.

### 1.3. Merchandising and social merchandising

The eleven countries analyzed contain the four facets concerning commercial and social merchandising:

1) The commercialization of products used in the productions: in **Spain** board games were created inspired in TV shows *El Ministerio del Tiempo* (TVE) and *La que se Avecina* (TV5); and in **Portugal** the wardrobe of the villain of telenovela *Amor Maior* (SIC) was sold, and the money was given to charity.

2) Product placement and soft sponsoring actions inside the stories: **Portugal, Mexico, Colombia** and **Brazil** resort to this strategy as a complement to traditional advertising and as an alternative to the break, avoiding zapping and the migration of audiences. Globo, the Brazilian production company, stands out as the promoter of this innovative technique, placing characters of the 21h telenovela in a scene in the 19h telenovela, in interaction with a clothing store/brand.

3) The use of social and current events to the construction of nuclei and stories inside the TV content: in **Argentina**, suicide and the recent social and economic crisis were themes explored in fiction; in **Uruguay**, productions explored stories about addiction, To-

urette and Down Syndrome; in **Brazil**, **Peru** and **Portugal**, gender issues were commonly explored too, with transgenderism, prostitution, child abuse and domestic violence being prominent themes. While somewhat unusual, in 2017 social causes were evoked in the **Chilean** television stories, in particular the recent emigration waves from foreign countries. The same theme has also been addressed in **Portugal** by SIC, opening the first episode of a prime time telenovela with the rescue of Syrian refugees in the Mediterranean Sea. In **Mexico**, and setting a difference in relation to the audiences, themes linked to justice and the struggle of the first lady against political corruption were explored.

4) Crossing between television/fiction and current events/public interest: both in **Brazil** and **Peru**, TV stations used real testimonies or displayed information in the end of the telenovela episodes as a way of sensitize for the importance of reporting or asking for help in unfair or dangerous situations. In **Colombia**, the characters of fictional shows participate in fund raisings for social projects. In a similar way, in **Portugal** homage to the firefighters following the wildfires that killed over 90 people was made in a prime time telenovela. In the **United States** movements in support of the victims of the hurricanes and the earthquake in **Mexico** multiplied, as well as in support of Hispanic communities in reaction to the threats of deportation made by Trump's administration, whereas in **Venezuela** specific spots were implemented in the television schedule to show examples of surpassing adversities and encouraging people to fight against them in daily situations.

#### **1.4. Communication policies**

As it had already been verified in previous years, the communication policies of these 11 countries being analyzed in this work experienced, either by modifications in the law or by the enforcement of new laws, some significant changes in their communicational environment. In the case of **Argentina**, the modifications in the 2017 communication policies followed what had already been

implemented since 2015, the laws of the *Servicios de Comunicación Audiovisual* (Audiovisual Communication Services) and *Argentina Digital*, which allowed a higher number of concentration and expansion of the dominant networks. However, if in previous years these changes have contributed to the elimination of the limits in pay TV concentration; for the increase of concentration in open TV and radio stations; to the possibility of transferring licenses; and to the extension of all audiovisual licenses; in 2017 this regulation went from essential to fragmented, with the implementation of laws that were, in most of the cases, contradictory with each other in a scheme of political integration. The end of 2017 in **Argentina** was marked by the possible formation of the biggest telecommunication conglomerate, with the fusion between Telecom with Cablevisión (Grupo Clarín), leading the domination of the audiovisual market in the urban centers.

In **Brazil**, 2017 will be remembered as the year of the analog TV blackout (only completely concluded by 2018) in most of the country, leading to the formation of a joint-venture between SBT, Record and RedeTV! and new rules on the broadcast of digital content, namely the payment of a service that used to be free. Concerning the implementation of DTT, **Chile** and **Peru** kept their program, since in the case of Chile the promulgation of Law n. 20,750/2014 delayed the deadline for the ceasing of the analogic broadcasts, now postponed for April 2020.

During the year 2017, **Colombia** established different types of laws that targeted improvements in the reception of mobile internet, cloud technology, IoT and social technologies. A recurring aspect of this commitment was the implementation of public policies for the indigenous people, with the creation of distribution sites, all over the country, of digital and internet signal (Vive Digital).

In 2017 the deals between the European Union member nations to coordinate the trans-frontier frequencies and avoid interferences have ceased, and a revision of the directive Services of Audiovisual Media was initiated, a fact that has conditioned the communication

policies in **Spain** and **Portugal**. The revision sought a reflection on: advertisement restrictions in terms of television slots; the protection of minors against potentially inappropriate content; the extension of the rules on European works to the suppliers and services; and the application of copyright rules in the digital environment, in order to enable a higher internationalization of content between member nations.

**Mexico**, when it comes to communication policies, has been through a lot of legal changes over the last year, which brought modifications on its media ecosystem. An example of this was the opening of new open network channels. Also, in November, the Supreme Court issued a resolution to regulate the State incentives in the media, since the lack of regulation on official State propaganda was conditioning, indirectly, freedom of speech.

In **Uruguay**, despite the entry into force of the *Ley de Servicios de Comunicación Audiovisual* (Law on Audiovisual Communication Services), approved in 2014, there was no regulation on the communication policies in 2017, having been constituted, in November, a *Comisión Honoraria Asesora de Servicios Audiovisuales* (Honorary Commission for the Audiovisual Services), which the law already provided, however without designated parliamentary representation to preside it. In **Venezuela** sanctions on certain media practices are still not being applied, like in the case of content produced by independent media. As a consequence of this policy, in November of last year, the *Ley Constitucional Contra el Odio, por la Convivencia Pacífica y la Tolerancia* (Constitutional Law against Hate, for Pacific Interaction and Tolerance) entered into effect. Thought of to promote peace, with a non-hate and non-violence message, this instrument has, however, provided a breeding ground for censorship and self-censorship, since it is the case that the establishment of this law enabled the silencing of any content that Venezuelan government considered in any way critical or contrary to its action. Proof of this was the cancellation of the subscription of US television channel CNN and the blockage of access to its website.



Censorship has also reached fictional content, with the restriction of the broadcast of Colombian series *El Comandante*, a biopic based on the life of late Venezuelan president Hugo Chávez, produced by Sony Pictures Television.

Lastly, in the **United States** the last year started with the Federal Communications Commission (FCC) authorizing Televisa to increase in 49% its presence in Univision Communications, which stands as the most important law in 2017, as it affected the corporative composition of Spanish TV channels in the US, which lead to Televisa being able to increase its participation in the broadcaster and run to the position of Univision's main shareholder. As the year was coming to the end, in December, another law was decisive in the communication policies' panorama in the US: Trump renews "net neutrality", forcing several Spanish telecommunication companies to negotiate basic access to internet services in the same molds of any other basic service, which lead, as a consequence, to the establishment of different services, provoking a "digital divide" rooted in economic factors, with direct impact in the transmission of information, the promotion of education and the access to entertainment offered by the internet.

## 1.5. ICT trends

The penetration of Obitel Latin American countries in the digital environment is still a very significant evidence, with a generalized concern, in this comparative, in the betterment of the internet's coverage, as a way of reaching a higher and higher number of people, once the global data indicate towards an exponential growth of internet users who consume audiovisual content through the internet.

**Argentina** leads the ranking of Latin American countries in the field of broadband connections, reaching about 7.4 million domestic accesses, with a penetration of 16.8% in the population (especially in the urban areas, with a strong decline in the rural areas), and with an average speed of 6 Mbps. However, **Brazil** and **Mexico** kept their places as the first and second biggest markets, respectively, for busi-

nesses in the area of telecommunication and radio broadcasting in Latin America.

In 2017, access to the internet in **Mexico** reached 71 million people with constant access to it. Data also show that, when Mexicans connect to the web, they prefer to do it mainly through their smartphones, with 40 million users choosing this device to access online content. In **Brazil**, domestic internet access is still one of the market's main concerns, with an increase in 2017 of about 64%, being mobile devices the main source of access. The consumption of videos on demand is the biggest tendency in the distribution of content in Brazil's digital environment, gaining territory in relation to TV. **Chile** followed the trend, having a growth in terms of access quality in mobile devices, with official data pointing towards a penetration of 100%. Because of its impact, the access to audiovisual content made the use of 4G technology in the access to internet by telephone grow exponentially. Contrarily to this, **Peru**, even though celebrating ten years of digital television, has not recorded any advance or significant tendency in the use of ICTs, showing a tardiness in the exploration of technological advances on behalf of the consumer.

**Colombia** had in 2017 a very important growth concerning the use of ICTs, with 72% of Colombian homes having access to electronic devices. This environment revealed an increase in the country's connectivity, with 76% of the homes having access to the web. In **Spain** the technological impact was manifested essentially with a higher demand for smartTVs, with 49% of the Spanish homes owning at least one of these devices, and 4K and HDR were the most popular options. Spanish data has also shown a significant increase in the audiovisual consumptions, particularly through smartphones, with an average consumption of four hours per week by each user. **Portugal** followed a similar tendency, with a significant growth in smartphone and social media use in the consumption, particularly, of online videos, Instagram permanence and web interaction while content is being consumed on TV. The same happened with the pop-

ulation of **Uruguay**, whose internet users kept increasing and the penetration of smartphones has reached 86% in 2017. Accordingly, with this tendency, cellphones became the most used device by the Uruguayans to access the internet (93%).

**Venezuela's** case is still special and different, since, just like it was identified in the public policies, subscription television, the penetration of internet and its free access were also conditioned by the existence of governmental censorship, which has limited the diffusion of free information and access to plural entertainment. Such fact has provoked the emergence of an illegal market that offers services like Netflix.

## 1.6. Public TV

During the year 2017, the Obitel countries have witnessed a further loss of public TV audiences, like in the case of **Argentina**, where the State's media have lost, inclusively, their centrality. **Chile** shares the same scenario: in the eminence of bankruptcy of TVN, the Congress has approved a capitalization plan to help the Chilean public channel, which has been in fourth place in the ratings for the last four years. In **Spain**, despite the slowing down of the advertisement investment, the big corporate groups were able to, contradicting the tendency, declare an increase of profit when comparing with the previous year. However, it has been possible through a cooperation model, with co-production to reduce costs and adjust production rhythms, with the paid platforms that have been a strong presence in Spanish open TV. **Portugal** has followed the same market logic, registering a decrease in terms of audiences in the open channels, where the fictional content, particularly telenovelas, are still the most popular programs.

Contrarily to this tendency to decrease, in **Mexico** public TV witnessed a moderated "resurging" in 2017, through the production and diffusion of fictional content in its programming grid.

In **Brazil**, despite budget cuts, salary adjustments and workers' strikes, both public TV channels have positioned themselves

as the broadcasters that, simultaneously with Record, produced the higher number of national content in 2017, as well as brought to the screen portraits of regions that would not otherwise have place in the television scene. An emphasis must also be put on the increase of importation, by TV Brasil, of content originating from Portuguese-speaking countries. With same values on the essence of different regions, **Colombia** funded their public TV into a strategy that offers alternative content for viewers with incentive for the local production, with the inclusion of regional and particular dynamics, from where transmedia experiences carried by Señal Colombia and Telecaribe are highlighted.

As indicated in the previous yearbooks, in 2017 TV in **Peru** kept performing the role of State channel, being utilized by the government as a broadcaster at the service of the Executive Power. This way, the broadcast of information shows was promoted, a juvenile channel for national identity promotion was launched, and a refuse to invest in fictional content production was kept, which was substituted by the broadcast, for six months, of show *Conversando con el Presidente*. In lockstep with this, in **Venezuela** we witnessed a system of public media, composed by 12 broadcasters (national, local, international and digital) that work as an instrument of official propaganda for the Partido Socialista Unido de Venezuela (Socialist Party), with content oriented only towards the obligatory political propaganda.

In **Uruguay**, in 2017, two public channels, TNU and TV Ciudad, have suffered profound changes in their organizations, with the change of those responsible for running both broadcasters and with the impossibility to access audimetric data on public TV, which got in the way of the management of public funds that sustained the channels.

The only TV channel oriented towards the Spanish public in the **United States** ceased to exist in 2017. As it ceased in the format it was known, it transformed itself. So, Vme stopped being an open television channel, linked to PBS, and started integrating the cable offer as a broadcaster with commercial goals.

## 1.7. Pay TV

The emergence and development of new players, the increase in competition, the diversification of supply in terms of telecommunication operators, and the social and economic crises were key factors to the configuration of pay TV's penetration and audience in the Obitel countries. So, in **Argentina**, where is estimated that 81% will adhere to pay TV, an increase in the 2016 numbers, we can highlight the agreement between the open signal channels and the pay channels for the co-production of series and miniseries in order to try to reduce the risks and increase international distribution. In **Colombia**, subscriptions kept on increasing, as well as in **Mexico**, mostly related to a lowering of costs and a diversification on the supply, as well as to the "mexicanization" of the supplied content with the production of local versions of popular entertainment formats. In **Spain**, in the **United States** and in **Peru**, consolidation was the way to go, with channel Movistar Plus broadcasting the first Peruvian production on pay TV. In **Portugal**, despite the increase in audiences, there was a decrease in subscriptions, a situation that was opposite to what happened in **Chile**. This same decrease was also visible in **Brazil**, particularly linked to the loss of purchase power of the middle and lower middle class. However, as a result of the Pay TV Law<sup>4</sup>, 30 original works of fiction were produced and broadcast in Brazil on channels Fox, AXN, HBO, Multishow, Warner and Universal. In **Uruguay**, contrarily to the tendencies of the last nine years, the number of subscribers slightly dropped, as in **Venezuela**, where the economic crisis and the censorship have led to the exit of some channels from the pay TV panel, like in the case of CNN in Spanish.

The internet content market, especially OTT, saw its presence becoming more significant in all countries, whether in the supply of foreign content or the supply of national content, and working

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<sup>4</sup> Proclaimed in 2011, the Pay TV Law forces foreign channels that produce films, series, animation and documentaries to produce 3h30 of weekly Brazilian content, and at least 50% of the works have to be produced by a national independent company.

as a threat to the linear supply. This can be particularly observed in **Brazil, Colombia, Spain, United States and Uruguay.**

### **1.8. Independent production companies**

Great part of the TV channels resorted to external production, which allowed a higher number of fiction on screen as well as a bigger narrative diversity. The resort to co-production has been a way of increasing budgets and improving the quality of the products. Such is the case of **Argentina**, which, during 2017, promoted a deal between open signal channels, pay TV operators, independent companies and international distributors. In **Brazil**, as a result of the Pay TV Law, independent companies saw their work grow, and advances in the open TV channels were made, with the co-production of nine titles. In **Chile**, the economic crisis of the open TV channels turned into an opportunity for the independent companies, as these same channels started choosing to externalize their productions, something that also happened in **Venezuela**, where, however, the situation of crisis in which the country finds itself led to a profound decrease in the number of content being produced. Bearing in mind the consolidation of the independent industry, in **Spain** several fusions were made between small companies, and in the **United States** and **Peru** the independent companies have ensured work.

In the case of **Colombia** and **Mexico**, independent production companies worked only for VoD, streaming and the internet (YouTube), while in **Portugal**, for the lack of obligations in terms of local production, these platforms have not distributed Portuguese content. In this country, the 27 independent companies have to fight for work for only two clients – State channel RTP and private channel SIC, since channel TVI resorts to its own internal production company.

### **1.9. International trends**

A generalized trend can be observed towards the appropriation of formats, styles and products. **Argentina, Chile and Mexico**

made their bets strongly on Turkish telenovelas, very popular in these countries, and **Peru** broadcasted a Korean version of show *Betty, la Fea* and *doramas*, both niche and low cost products of Korean origin. Characteristics of the American series were adopted by other countries, like **Brazil** and **Colombia**, which made their productions shorter, divided in seasons, with more violence and sex in order to attract a younger audience and appeal to the international market. The **United States** set the difference with new formats, like the superseries. In Europe, **Spain** distinguishes by being able to export a large number of formats and participating in international co-productions that have been giving a lot of visibility to its fiction, at the same time that we see the consolidation of the position of operators, like Telefónica, performing different roles such as aggregators, distributors and financiers of fiction projects. In **Portugal**, in spite of not having any legal decision up to now, French company Altice, owner of national company MEO, has positioned itself to acquire Media Capital, owner of commercial TV channel TVI. On the other hand, **Venezuela**, due to its economic and social crisis, which allowed foreign currency investment to be profitable in the local currency, turned into an interesting ally for the development of co-productions.

## 2. Comparison of television fiction in Obitel countries in 2017

The comparative synthesis of the monitoring of television fiction in the 11 Obitel countries<sup>5</sup> is based on production indicators established in the Obitel's Methodological Protocol. Discussed and updated annually, it is followed by every national research team. The main data we present pertains to the total of hours of fictional content, total of titles, format, schedule, number of chapters/episodes, as well as circulation (import/export) and co-production data. We will also do, when there is an opportunity, analyses of the three-

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<sup>5</sup> Due to the absence of Ecuador in the 2017 analysis and in order to guarantee the comparability of the national data in the last three years, the results displayed from years 2016 and 2015 do not contemplate the data from Ecuador.

year period between 2015 and 2017, in order to see the bigger picture in terms of time and, particularly, to identify and analyze the most significant tendencies in the Ibero-American television fiction.

**Table 2. Number of hours of Ibero-American television fiction in 2017**

Total number of hours	2015		2016		2017		TOTAL
	National	Ibero-American	National	Ibero-American	National	Ibero-American	
	8,833	16,178	9,299	17,090	10,507	15,172	
<b>TOTAL</b>	<b>25,011</b>		<b>26,389</b>		<b>25,679</b>		<b>77,079</b>

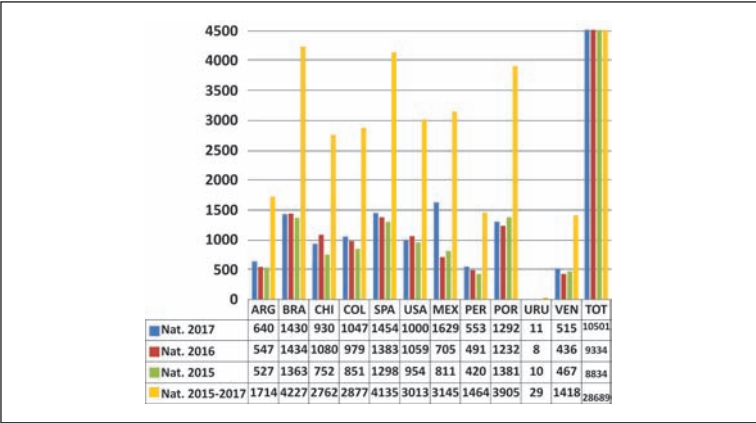
The global number of hours dedicated to national and Ibero-American fiction in 2017 registered a decrease of 2.8% in comparison to 2016, and the reason is the decrease in the offer of Ibero-American content, namely from **Argentina, Brazil, Chile, the United States** – after increasing the offer in 2016 in comparison to 2015 –, **Colombia, Portugal and Uruguay** – in a descending curve since 2015.

When it comes to premiering national content, 2017 registered the highest number of the triennial 2015-2017, with an increase of almost 16% when comparing with 2015. Most *Obitel* countries (**Argentina, Colombia, Spain, Mexico, Peru, Portugal, Uruguay and Venezuela**) can take credit for this accomplishment. The decrease of offer in **Brazil** and the **United States** was residual, while the decrease of offer in **Chile** was more significant, a similar situation to what happened with the Ibero-American offer of fictional content.



**Table 3. Supply of hours of national and Ibero-American fiction by country (2015-2017)**

**3.1. Supply of hours of national fiction (2015-2017)**

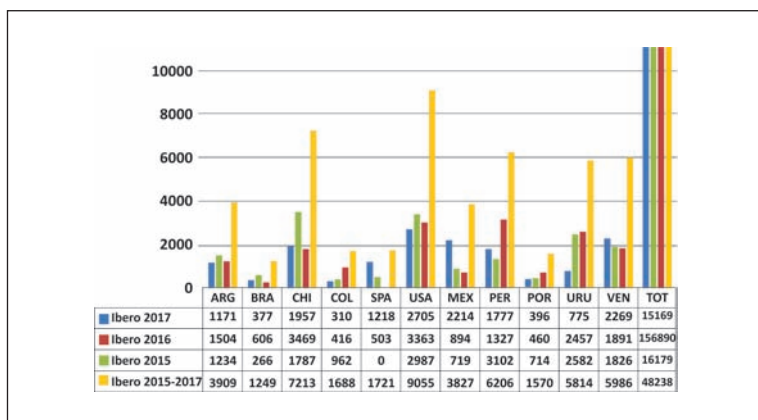


As previously referred, the offer on national fictional content has been increasing in relation to the last two years. Regardless of real volume of production, the countries that have been showing a gradual and consistent growth in the last three years and have been contributed positively to the performance of domestic product are **Argentina, Colombia, Spain** and **Peru**. Obitel considers that national production measured in hours is the best quantitative indicator of the production capacity in television fiction. Following the classification made for the triennial 2013-2015<sup>6</sup> and taking into consideration the changes in the volume of supply undertaken in 2016 and 2017, we present the following classification:

High production capacity (4000h-)	Brazil, Spain
Medium-high production capacity (3000h-3999h)	Portugal, Mexico, United States
Medium production capacity (2000h-2999h)	Colombia, Chile
Medium-low production capacity (1000h-1999h)	Argentina, Peru, Venezuela
Low production capacity (0h-999h)	Uruguay

<sup>6</sup> See Obitel Yearbook 2016, available at <http://obitel.net/wp-content/uploads/2016/09/obitel-portugues-2016-1.pdf>

### 3.2. Supply of hours of Ibero-American fiction (2015-2017)

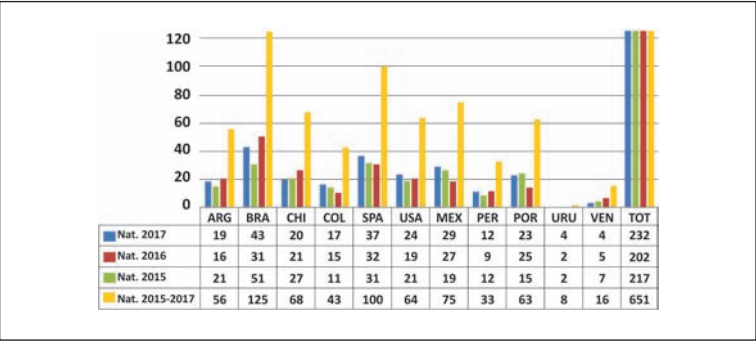


In terms of the supply of hours of fictional content imported from the Obitel countries, a decrease is registered by most countries (**Argentina, Brazil, Chile, Colombia, United States, Portugal** and **Uruguay**), with **Brazil** and **Portugal** offering the lowest volume of Ibero-American content (377 and 396, respectively). In the remaining four countries – **Spain, Mexico, Peru** and **Venezuela** – an increase can be observed in terms of supply of imported products, with the European country scoring a growth of about 23% in relation to 2016, due to also an increase of telenovelas in the schedules of DTT thematic channels.

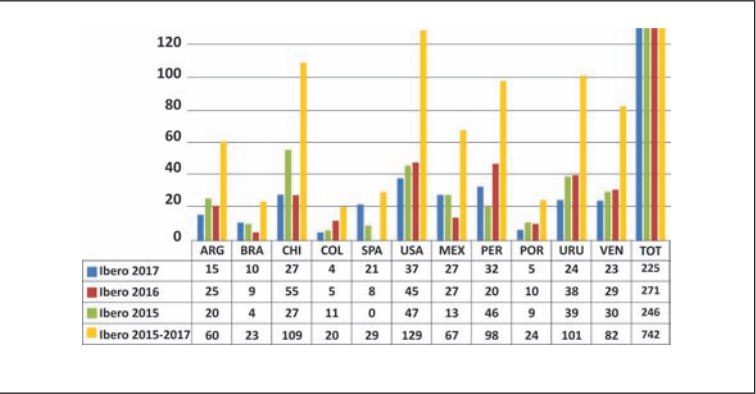
If we compare the sum of hours of national and imported fiction by country, we will see that, in 2017, keeping the tendency of the last seven years, only **Brazil, Colombia, Spain** and **Portugal** have supplied more hours of domestic content.

**Table 4. Supply of national and Ibero-American fiction by country (2015-2017)**

**4.1. Supply of national fiction**



**4.2. Supply of Ibero-American fiction**

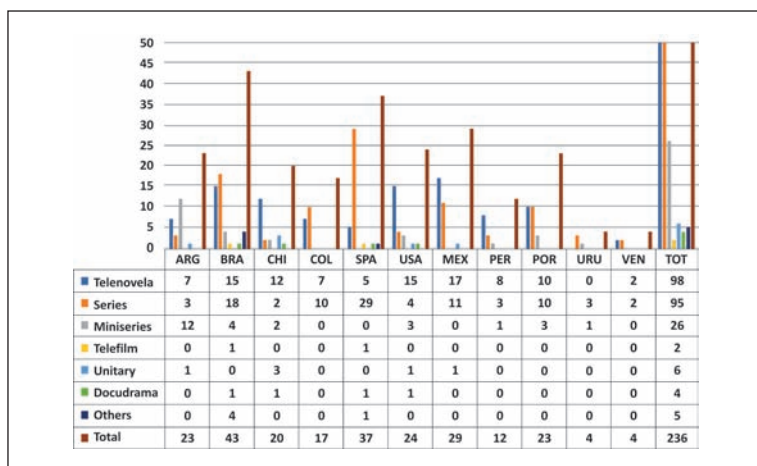


Concerning the supply of national fiction in 2017, we can see that **Argentina, Brazil, Colombia, Spain, United States, Mexico, Peru** and **Uruguay** have increased their production, while **Chile, Portugal** and **Venezuela** have decreased it. Nonetheless, **Portugal** and **Venezuela** have seen an increase in the number of hours, a result of the supply of long-term serialized content. If we analyze the three-year period, the top five countries with the higher number of

fiction titles produced domestically are **Brazil** (125), **Spain** (100), **Mexico** (75), **Chile** (68) and **Portugal** (63).

The same analysis made to the importation of products shows a top five with **United States** (129) in the first place, followed by **Chile** (109), **Uruguay** (101), **Peru** (98) and **Venezuela** (82), although this last country has seen a growth in the supply of foreign products from 2016 to 2017. The tendency towards decrease is transversal, with **Colombia** and **Portugal** having the lowest numbers (four and five titles, respectively).

**Table 5. Formats of national fiction and number of titles in 2017**



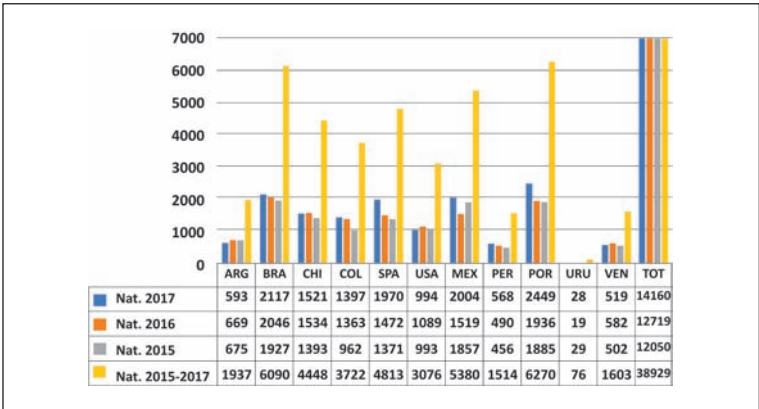
In 2017, **telenovelas** were, once again, the preferred format for the presentation of television fiction narratives in the *Obitel* countries (98). In first place, we have **Mexico** (17), followed by **Brazil** and the **United States** (15), **Chile** (12) and **Portugal** (10). The countries with the lowest numbers of telenovelas were **Spain** (5), traditionally distant from the format, and **Venezuela**, as a consequence of the political, economic and social crisis the country has been going through, and, lastly, **Uruguay** (0), whose titles are essentially imported, showing a lack of production capacity.

The second most popular format is the **series**, with **Spain** being its main producer (29). All the other countries have produced titles in the category, notwithstanding the accentuated contrast with the Spanish numbers (between 18 and 2). The third most popular format, just like in previous years, was the **miniseries**. With a total number of 26 titles, it had its bigger expression in **Argentina**, in virtue of the public television policies for the scheduling of premieres and the national co-productions offered by Telefe and El Trece.

The **telefilm**, **docudrama** and **unitary** were formats used residually. Besides, although sporadically, the use of **sitcoms** and **soap operas** (with an unlimited number of episodes) was registered, particularly by **Brazil** and **Spain**.

**Table 6. Supply of chapters/episodes of national and Ibero-American fiction (2015-2017)**

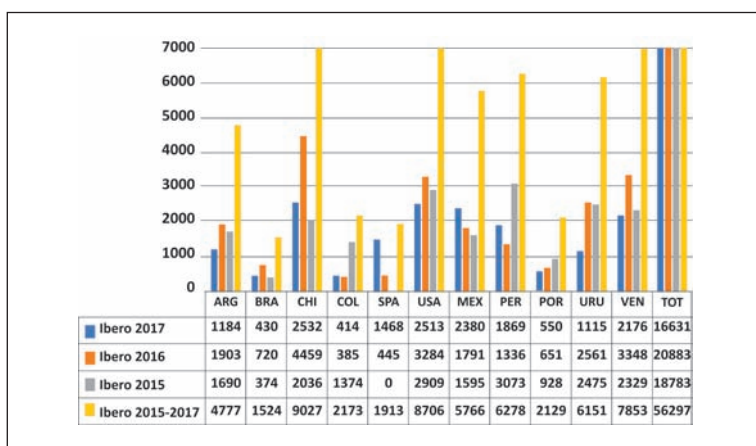
**Table 6.1. Supply of chapters/episodes of national fiction**



The serial dimension on the total supply of the Obitel countries has been increasing in the last three years (from 12,050 in 2015 to 14,160 in 2017). The country with the highest number was **Portugal**, with 6,270 chapters/episodes in the three-year period, a consequence, essentially, of the bet from the open signal channels on the

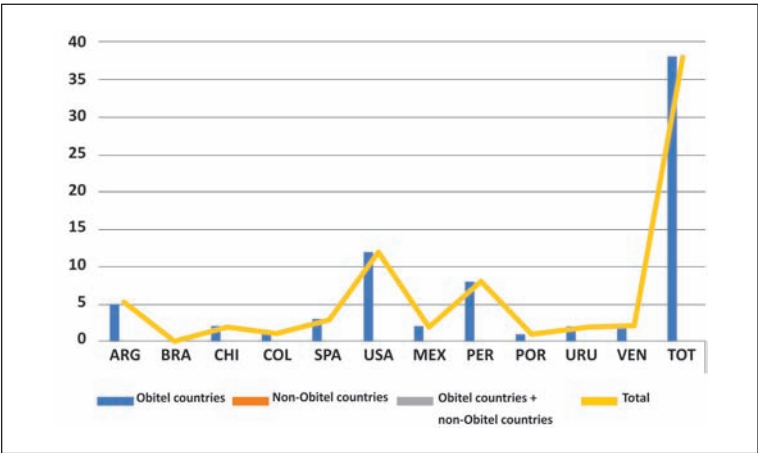
continuous scheduling of two or three daily telenovelas in prime time with a duration of about 400 episodes each (a year of exhibition). In second and third places we can find **Brazil** (6,090) and **Mexico** (5,380), countries with high and medium-high production capacity.

**Table 6.2. Supply of chapters/episodes of Ibero-American fiction**

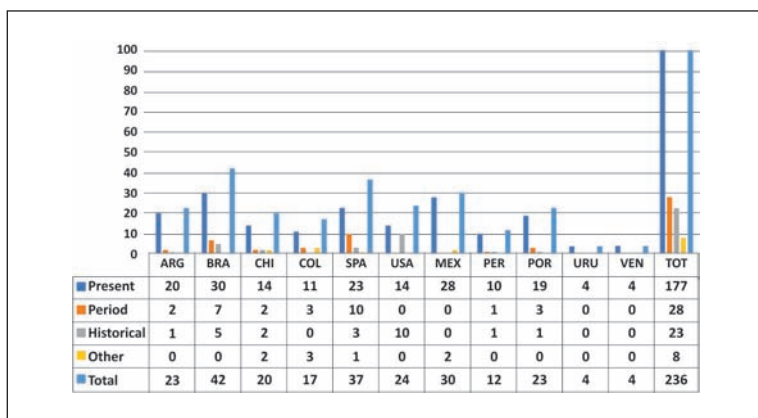


In a three-year analysis, we can verify that 2016 registered the highest number of chapters/episodes in the whole of the *Obitel* countries, followed by 2015; in 2017, a decrease could be observed, in about 21%, in relation to the previous year. These oscillations are due to the decrease of productions and hours of Ibero-American fictional content operated by most countries. We highlight two countries for their inverse singularity: **Portugal**, due to the success of national fiction in prime time, diminished the number of Brazilian titles and dragged them to the late night time slot, allowing the speculation on their final disappearance from the schedule, like it happened to Latin American content; and **Spain**, by showing, throughout the years, an incongruent supply of Ibero-American products – from zero in 2014 to 1,468 in 2017, making up an increase of almost 70% of chapters/episodes in relation to 2016.

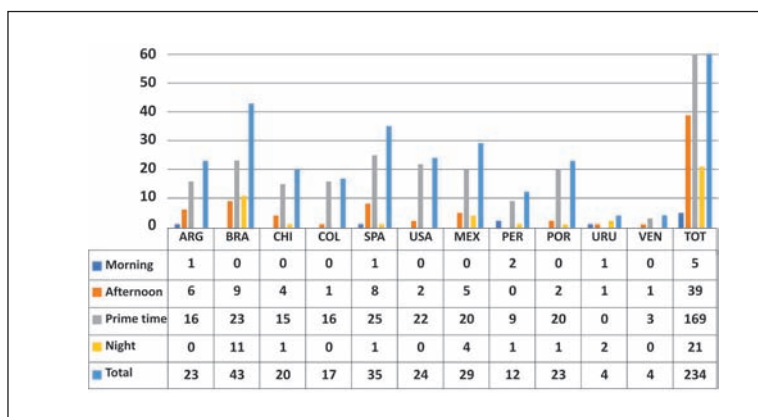
Table 7. Co-productions in 2017



On the whole, 38 co-productions were made between the Obitel countries, with the **United States** and **Peru** developing a total number of 20 titles. Some of these titles figured on the top ten of the most watched titles, standing out *La Piloto* (a co-production between **Colombia**, the **United States** and **Mexico**), which tells the story of the challenges faced by Yolanda Cadena, a woman pursuing a career as an airplane pilot; and *El Regreso de Lucas* (a co-production between **Argentina** and **Peru**), which is a dramatic thriller, integrally shot in Peru’s natural scenery, whose main conflict is the loss and search of a child who went missing on a beach. The two titles figured between the most watched products in 2017 in the several countries where they were broadcast, showing the vitality and importance of sharing financial efforts as well as technical and artistic resources.

**Table 8. Time period of national fiction in 2017**

Just like in previous years, the present was the most common time period in fictional content, representing 75% of the titles. Stories happening in the present allow an exploration of contemporary themes, adapted to the format of serialized content. In second place come the period pieces, with Spain concentrating most of the supply of this type (10 out of the 28 titles), resulting from an already established tradition. Nevertheless, we can see a diversification on the storytelling of the different stories.

**Table 9. Titles of national fiction by time slot in 2017**



**Prime time** is still the preferred time slot for the broadcasting of national fiction (72%), followed by the **afternoon** slot, usually after the lunchtime newscast and aimed at a female audience. In third place, there is the **night** slot, destined to products of less consensual content, in particular the series format. The **morning** slot was the least significant, having products directed at the young audience or, just like the night slot, showing a lot of reprises.

### 3. The most watched TV fictions of the year

**Table 10. The ten most watched titles in each of the Obitel countries in 2017 (origin, format, rating and share)**

Title	Rat%	Sh%	Format	Producer	Channel	Country of origin	Country of exhibition
<i>A Força do Querer</i>	35.4	51.9	Tele-novela	Globo	Globo	Brazil	Brazil
<i>O Outro Lado do Paraíso</i>	32.4	48.7	Tele-novela	Globo	Globo	Brazil	Brazil
<i>A Lei do Amor</i>	30.3	45	Tele-novela	Globo	Globo	Brazil	Brazil
<i>Perdona Nuestros Pecados</i>	28.8	42.5	Tele-novela	Mega	Mega	Chile	Chile
<i>Pega Pega</i>	28.3	44.1	Tele-novela	Globo	Globo	Brazil	Brazil
<i>Malasartes</i>	27.7	45.9	Miniseries	Globo, O2 Filmes, Universal Pictures, Globo Filmes	Globo	Brazil	Brazil
<i>Rock Story</i>	27.5	42.8	Tele-novela	Globo	Globo	Brazil	Brazil
<i>Sob Pressão</i>	26.3	45.2	Series	Globo, Conspiração Filmes	Globo	Brazil	Brazil
<i>Sol Nascente</i>	25.3	43.9	Tele-novela	Globo	Globo	Brazil	Brazil
<i>Novo Mundo</i>	25.2	41.1	Tele-novela	Globo	Globo	Brazil	Brazil
<i>Aldo – Mais Forte do que o Mundo</i>	25.1	40.8	Miniseries	Globo, Black Maria, Universal Pictures, Globo Filmes	Globo	Brazil	Brazil
<i>Señores Papis</i>	24.2	36.5	Tele-novela	Mega	Mega	Chile	Chile

<i>VBO: Todo por la Fama</i>	20.3	33	Tele-novela	América PROTV	América Televisión	Peru	Peru
<i>Amanda</i>	20.2	40.8	Tele-novela	AGTV, Mega	Mega	Chile	Chile
<i>De Vuelta al Barrio</i>	19	29.8	Tele-novela	América Televisión	América Televisión	Peru	Peru
<i>Verdades Ocultas</i>	18.9	39.3	Tele-novela	AGTV, Mega	Mega	Chile	Chile
<i>La Rosa de Guadalupe</i>	18.7	32.5	Series	Televisa	Canal 2	Mexico	Mexico
<i>Hoy Voy a Cambiar</i>	18.5	27.2	Miniseries	Televisa	Canal 2	Mexico	Mexico
<i>Enamorándome de Ramón</i>	18.2	29.3	Series	Televisa	Canal 2	Mexico	Mexico
<i>Solo una Madre</i>	18.3	29.8	Tele-novela	Del Barrio Producciones	América Televisión	Peru	Peru
<i>Mi Marido Tiene Familia</i>	17.6	25.6	Tele-novela	Televisa	Canal 2	Mexico	Mexico
<i>La Doble Vida de Estela Carrillo</i>	16.9	25.8	Tele-novela	Televisa	Canal 2	Mexico	Mexico
<i>El Bienamado</i>	16.8	25.5	Tele-novela	Globo	Canal 2	Brazil	Mexico
<i>Mujercitas</i>	16.8	26.3	Tele-novela	Del Barrio Producciones	América Televisión	Peru	Peru
<i>Papá a Toda Madre</i>	16.6	26.2	Tele-novela	Televisa	Canal 2	Mexico	Mexico
<i>Caer en Tentación</i>	16.5	24.6	Tele-novela	Televisa	Canal 2	Argentina	Mexico
<i>Tranquilo Papá</i>	16.4	27.1	Tele-novela	Mega	Mega	Chile	Chile
<i>La Piloto</i>	16.3	26.9	Tele-novela	W Studios, Lemon Studios, Televisa, Univision	Canal 2	Colombia, United States, Mexico	Mexico
<i>Justicia</i>	15.9	27.6	Miniseries	Globo	Mega	Brazil	Chile
<i>Ámbar</i>	15.6	27	Tele-novela	Mega	Mega	Chile	Chile
<i>El Regreso de Lucas</i>	15.4	24.7	Tele-novela	América Televisión, Telefe	América Televisión	Peru, Argentina	Peru

<i>Moisés y los Diez Mandamientos</i>	15.3	26	Tele-novela	Rede Record	Telefe	Brazil	Argentina
<i>Colorina: Madre por Siempre</i>	15	24.3	Tele-novela	Del Barrio Producciones	América Televisión	Peru	Peru
<i>Las Estrellas</i>	14.9	22.9	Tele-novela	Pol-ka Producciones	El Trece	Argentina	Argentina
<i>Colorina</i>	14.3	22.7	Tele-novela	Del Barrio Producciones	América Televisión	Peru	Peru
<i>A Herdeira</i>	14.3	30	Tele-novela	Plural Entertainment	TVI	Portugal	Portugal
<i>Verdades Secretas</i>	13.8	22.7	Tele-novela	Globo	Teledoce	Brazil	Uruguay
<i>Moisés y los Diez Mandamientos</i>	13.7	27.5	Tele-novela	Record	Saeta	Brazil	Uruguay
<i>Amanda</i>	13.7	20.1	Tele-novela	Mega	Teledoce	Chile	Uruguay
<i>Amores que Matan</i>	13.6	28	Series	América Televisión	América Televisión	Peru	Peru
<i>Ouro Verde</i>	13.6	28.5	Tele-novela	Plural Entertainment	TVI	Portugal	Portugal
<i>Reglas del Juego</i>	13.5	20.3	Tele-novela	Globo	Teledoce	Brazil	Uruguay
<i>Las Estrellas</i>	13.4	19.4	Tele-novela	Pol-ka Producciones	Teledoce	Argentina	Uruguay
<i>Amor Maior</i>	12.8	26.8	Tele-novela	SP Televisão, SIC	SIC	Portugal	Portugal
<i>Josué y la Terra Prometida</i>	12.7	19.8	Tele-novela	Rede Record	Telefe	Brazil	Argentina
<i>Única Mulher</i>	12.6	30.5	Tele-novela	Plural Entertainment	TVI	Portugal	Portugal
<i>Josué y la Tierra Prometida</i>	12.4	22.4	Tele-novela	Record	Saeta	Brazil	Uruguay
<i>Moisés y los Diez Mandamientos</i>	12.4	21.4	Tele-novela	Rede Record	Latina	Brazil	Peru
<i>Tarde lo Conocé</i>	12.2	36.1	Series	Caracol	Caracol	Colombia	Colombia
<i>Amar Después de Amar</i>	12.1	20.9	Tele-novela	Telefe Contenidos	Telefe	Argentina	Argentina
<i>Los Morales</i>	12.1	25.5	Series	Caracol	Caracol	Colombia	Colombia

<i>Perdona Nuestros Pecados</i>	12.0	19.3	Tele-novela	Mega	Tele-doce	Chile	Uruguay
<i>Paixão</i>	11.7	24.3	Tele-novela	SP Televisão, SIC	SIC	Portugal	Portugal
<i>Totalmente Diva</i>	11.5	22	Tele-novela	Globo	Mega	Brazil	Chile
<i>La Rosa de Guadalupe</i>	11.5	24.6	Series	Televisa	América Televisión	Mexico	Peru
<i>Moisés y los Diez Mandamientos</i>	11.3	18	Tele-novela	Rede Record	TVN	Brazil	Chile
<i>Sin Tetas Sí Hay Paraíso</i>	11.1	39.3	Series	Fox Telecolombia	Caracol	Colombia	Colombia
<i>El Regreso de Lucas</i>	10.9	22.4	Tele-novela	Telefe, América Televisión	Mega	Peru, Argentina	Chile
<i>Golpe al Corazón</i>	10.7	18.8	Tele-novela	LCA Producciones	Telefe	Argentina	Argentina
<i>El Maestro</i>	10.7	16.8	Miniseries	Pol-ka Producciones	Tele-doce	Argentina	Uruguay
<i>La Fragilidad de los Cuerpos</i>	10.4	18	Miniseries	Pol-ka Producciones, Turner International Argentina, El Trece, Cablevisión	El Trece	Argentina	Argentina
<i>Los Milagros de Jesús</i>	10.2	19.3	Tele-novela	Rede Record	Telefe	Brazil	Argentina
<i>Fanny, la Fan</i>	10.2	15.5	Tele-novela	Underground Producciones	Telefe	Argentina	Argentina
<i>A Impostora</i>	10	25.9	Tele-novela	Plural Entertainment	TVI	Portugal	Portugal
<i>Quiero Vivir a tu Lado</i>	9.9	17.5	Tele-novela	Pol-ka Producciones	El Trece	Argentina	Argentina
<i>Un Gallo para Esculapio</i>	9.8	21	Miniseries	Underground Producciones, Boga Bogagna, TNT	Telefe	Argentina	Argentina
<i>Cuando Vivas Conmigo</i>	9.8	32.6	Tele-novela	Caracol	Caracol	Colombia	Colombia
<i>El Color de la Pasión</i>	9.6	18.8	Tele-novela	Televisa	Univision	Mexico	United States
<i>Jogo Duplo</i>	9.6	26.2	Tele-novela	Plural Entertainment	TVI	Portugal	Portugal
<i>Velvet</i>	9.3	19.4	Series	Atresmedia	Tele-doce	Spain	Uruguay
<i>La Nocturna</i>	9.1	32.1	Tele-novela	Caracol	Caracol	Colombia	Colombia

<i>Vino el Amor</i>	9	16.3	Tele-novela	Televisa	Univision	Mexico	United States
<i>El Señor de los Cielos 5</i>	8.9	18	Tele-novela	Telemundo, Argos	Telemundo	United States, Mexico	United States
<i>Rainha das Flores</i>	8.8	24	Tele-novela	SP Televisão, SIC	SIC	Portugal	Portugal
<i>El Chema</i>	8.8	17.3	Tele-novela	Telemundo, Argos	Telemundo	United States, Mexico	United States
<i>Los Ricos no Piden Permiso</i>	8.8	16.6	Tele-novela	Pol-ka Producciones	Tele doce	Argentina	Uruguay
<i>Polvo Carnavalero</i>	8.7	26.2	Tele-novela	Caracol	Caracol	Colombia	Colombia
<i>Espelho D'Água</i>	8.6	23.4	Tele-novela	SP Televisão, SIC	SIC	Portugal	Portugal
<i>La Ley del Corazón</i>	8.3	24.7	Series	RCN	RCN	Colombia	Colombia
<i>Sin Senos Sí Hay Paraíso 2</i>	7.8	14.7	Tele-novela	Fox Telecolombia	Telemundo	United States, Colombia	United States
<i>Alias JJ</i>	7.6	28.8	Series	Caracol	Caracol	Colombia	Colombia
<i>La Piloto</i>	7.4	14.9	Tele-novela	W Studios, Lemon Studios, Televisa, Univision	Univision	Colombia, Mexico, United States	United States
<i>La Doble Vida de Estela Carrillo</i>	7.4	14.5	Tele-novela	Televisa	Univision	Mexico	United States
<i>Mi Marido Tiene Familia</i>	7.4	13.9	Tele-novela	Televisa	Univision	Mexico	United States
<i>La Cacica</i>	7.1	26.3	Series	Caracol	Caracol	Colombia	Colombia
<i>La Doña</i>	7.1	12.8	Tele-novela	Telemundo, Argos	Telemundo	United States, Mexico	United States
<i>Allí Abajo</i>	7	19.7	Series	Plano a Plano	Antena3	Spain	Spain
<i>El Chapo</i>	7	13.6	Miniseries	Netflix, Univision	Univision	United States	United States
<i>La que se Avecina</i>	6.6	19.9	Series	Contubernio	Tele5	Spain	Spain
<i>Cuéntame Cómo Pasó</i>	6.5	17.6	Series	Grupo Ganga Producciones, RTVE	La1	Spain	Spain
<i>Perdóname, Señor</i>	6.3	19.1	Series	Gossip Events & Producciones	Tele5	Spain	Spain

<i>Las Vegas</i>	6.1	20.3	Series	Vista Producciones	RCN	Colombia	Colombia
<i>El Accidente</i>	6.1	17.5	Series	Globomedia	Tele5	Spain	Spain
<i>Sé Quién Eres</i>	5.4	15.2	Series	Arca Audiovisual	Tele5	Spain	Spain
<i>Tiempos de Guerra</i>	5.2	15.5	Series	Bambú Producciones	Antena3	Spain	Spain
<i>La Casa de Papel</i>	5.2	14.2	Series	Vancouver Producciones	Antena3	Spain	Spain
<i>Estoy Vivo</i>	4.9	14.1	Series	Globomedia	La1	Spain	Spain
<i>Pulsaciones</i>	4.8	12.9	Series	Globomedia	Antena3	Spain	Spain
<i>A Força do Querer</i>	4.7	20.8	Telenovela	Globo	SIC	Brazil	Portugal
<i>Para Verte Mejor</i>	3.3	17	Telenovela	Venevisión	Venevisión	Venezuela	Venezuela
<i>La Dinastía</i>	3.1	16.3	Series	Caracol	Venevisión	Colombia	Venezuela
<i>Las Hermanitas Calle</i>	2.8	19	Telenovela	Caracol	Televen	Colombia	Venezuela
<i>Cuando Vivas Conmigo</i>	2.6	14.1	Telenovela	Caracol	Televen	Colombia	Venezuela
<i>Silvana sin Lana</i>	2.5	13.3	Telenovela	Telemundo	Televen	United States	Venezuela
<i>Un Camino Hacia el Destino</i>	2.2	19.3	Telenovela	Televisiva Int.	Venevisión	Mexico	Venezuela
<i>Vino el Amor</i>	2.1	18	Telenovela	Televisa	Venevisión	Mexico	Venezuela
<i>Tres Veces Ana</i>	2	10.3	Telenovela	Televisa	Venevisión	Mexico	Venezuela
<i>La Suegra</i>	1.9	10	Telenovela	Caracol	Venevisión	Colombia	Venezuela
<i>Mi Marido Tiene Familia</i>	1.9	11.5	Telenovela	Televisa	Venevisión	Mexico	Venezuela

Table 10 gathers the top ten titles of the eleven countries organized by rating, in a total of 110 productions. Among the ten first places, we find nine **Brazilian** productions, all from Globo, and one **Chilean** production, telenovela *Perdona Nuestros Pecados*, produced and broadcasted by Mega. Out of the ten titles, eight are telenovelas, and the rest are series and one miniseries, both produced and broadcast by Globo, a tendency that has been kept through the years.

*Moisés y los Diez Mandamientos* (Brazil, Record) was the title with the most occurrences, figuring among the top ten most seen

titles in **Argentina, Uruguay, Peru** and **Chile**. While originally from Brazil, it did not figure in the country's top ten list, showing the impact of imports in some of the countries (like in Uruguay and Venezuela, where the most viewed titles come from Ibero-America).

An emphasis should also be given to co-productions between Obitel countries, exhibited in the producing countries, but also in other countries: *La Piloto* (co-produced by **Mexico, United States** and **Colombia**, successfully broadcast in the **United States** and **Mexico**); *El Regreso de Lucas* (a co-production between **Peru** and **Argentina**, successfully broadcast in **Peru** and **Chile**); *El Señor de los Cielos 5* (a co-production between the **United States** and **Mexico**); *Sin Senos Sí Hay Paraíso* (a co-production between the **United States** and **Colombia**, successfully broadcast in both countries); and *La Doña* (a co-production between the **United States** and **Mexico**, successfully broadcast in the first country). Another interesting fact that shows the growing impact of the Korean products on a global scale is the Mexican adaptation of *My Husband Got a Family* (KBS 2TV, 2012), *Mi Marido Tiene Familia* (Televisa), a telenovela successfully broadcast in **Mexico, Venezuela** and the **United States**.

**Table 11. Format and time slots of the tem most watched titles in 2017**

Country	Formats				Time slots			
	Tele-novela	Series	Mini-series	Other	Morn-ing	After-noon	Prime time	Night
Argentina	8	0	2	0	0	0	10	0
Brazil	8	1	1	0	0	2	8	0
Colombia	3	7	0	0	0	0	10	0
Chile	9	0	1	0	0	2	8	0
Spain	0	10	0	0	0	2	8	0
United States	9	0	1	0	0	0	10	0
Mexico	4	4	1	1	0	2	8	0
Peru	8	2	0	0	0	0	10	0
Portugal	10	0	0	0	0	0	7	3
Uruguay	8	1	1	0	0	0	2	8
Venezuela	9	1	0	0	0	2	8	0
<b>TOTAL</b>	<b>76</b>	<b>26</b>	<b>7</b>	<b>1</b>	<b>0</b>	<b>10</b>	<b>89</b>	<b>11</b>

While telenovela is the most common format (76 titles), just like in 2016, the series and miniseries registered, combined, 33 titles, showing a global tendency towards the decrease of serialization of the products. **Spain** and **Colombia** were the countries that presented a higher number of series (ten and seven, respectively), confirming, in the first case, the tradition of non-production of highly serialized content.

The products with a higher audience were presented, in most countries, in prime time (89 titles), making this the privileged time slot for the presentation and consumption of fictional content. The night slot came in second (11 titles), working as an arena for the extension of titles premiered in prime time, to the introduction of a second or third line of fiction, or even to the introduction of products of short or medium dimension and with a plot less suitable for families.

**Table 12. Producing and importing countries between the ten most watched titles in 2017 in the *Obitel* countries**

Producing country	Number of occurrences	Number of titles	Number of trades	Importing countries
Argentina	13	11	6	Chile, Mexico, Peru, Uruguay
Brazil	23	18	13	Argentina, Chile, Peru, Mexico, Portugal, Uruguay
Colombia	16	16	6	United States, Venezuela
Chile	8	8	2	Uruguay
Spain	11	11	1	Uruguay
United States	8	7	1	Venezuela
Mexico	19	15	13	United States, Peru, Venezuela
Peru	9	7	1	Chile
Portugal	9	9	0	0
Uruguay	0	0	0	0
Venezuela	1	1	0	0
<b>TOTAL</b>	<b>117</b>	<b>103</b>	<b>43</b>	-

Table 12 shows the circulation of the ten most watched titles of each *Obitel* country. The fictions with the highest audience vary between national productions, Ibero-American productions and co-productions. The number of occurrences indicates how many times



a production from the same country shows up between the 110 most viewed titles, and these productions could have been the most watched in the producing country or successfully broadcast in other countries. Just like it happened in 2016, **Mexico** and **Brazil** were the countries with the highest number of occurrences, but **Colombia** entered this group in 2017. These three countries combined have also registered the highest number of trades, allowing Brazilian products to be consumed with high audience in **Argentina**, **Chile**, **Mexico**, **Peru** and **Portugal**. Mexican products were sold and consumed successfully for/in the **United States**, **Peru** and **Venezuela**, while Colombian products were sold to the **United States** and **Venezuela**.

#### 4. Transmedia reception in Obitel countries

For the year 2017 the production of stories to be consumed through diverse platforms kept on being part of the transmedia strategies operated by the TV broadcasters in the Obitel countries. With different transmedia options, the 11 countries, in the comparative, reiterated the importance of audience interaction and manifested globally a growing interest in the creation of different and complementary stories that spread out through different communication platforms.

In the case of **Venezuela**, the transmedia reception was, just like in other Obitel countries, limited by the plea, from the TV channels, to the participation of audiences through social network like Facebook, Instagram and Twitter and in the promotion of the respective YouTube channels of television products. However, public interaction is almost unseen. In this aspect, the only difference in relation to 2017 was the incorporation of inserts with Twitter tags on the screen on Venesisión broadcasts to increase the production of social media content with this tag. Another aspect was the creation, by Diosdado Cabello, president of the Partido Socialista Unido da Venezuela (Venezuela's Socialist Party), of a website for accusations through Twitter of all the cable television operators that broadcasted *El Comandante*, a series about the life of ex-president Hugo Chávez, with the hashtag #AquíNoSeHablaMalDeChávez, demon-

strating how “hashtaging” can serve as a digital tool for audience interaction.

In general, the transmedia reception of fictional content in **Argentina** did not show many particularities, besides the initiatives taken to establish a dialogue between fictional content and the audience through participation on social media (Facebook, Twitter, Instagram), which complement visualization on the TV screen. The only example that followed a different strategy was *Animadores*, a series that jumped from the universe on demand to the TV screen, in a contrary movement to what was known so far, but that ended up dragging the audiences it had already collected in the online platform and giving feedback to the already existing commentaries.

On the other hand, in **Brazil**, there were many demands from the broadcasters to reach the audience through multiplatforms. Since the adoption of binge watching techniques, of continuous consumption (like Netflix), Brazilian open TV sought to place, for the production of webseries, platforms like Gshow and Globo Play to reach this consumption goal. There was the release of *Dois Irmãos* (Globo), a series that adapted the storyline of the book to a graphic novel and ended up turning into a miniseries. Amongst transmedia strategies applied in 2017, Globo stands out by creating the interaction with e-book *Assista a Esse Livro*, of series *Dois Irmãos*, which allowed the access to video clips to watch on Kindle, using different types of media to create different experiences that one medium only cannot produce. Another example involving the broadcast of TV content with social media was the execution of a Twitter live in the exhibition of *Dancing Brasil*, broadcast by Record, which enables a bigger interaction and participation from the audience on multiple screens. In Brazilian networks, the highlight goes to telenovela *A Força do Querer* (Globo), which, due to the social and polemic nature of the themes discussed, became the fiction with the highest repercussion on Twitter in 2017, registering over 800 million impressions in 6 million tweets, making this network the preferred medium to make contact between TV and audience.

In **Chile**, the transmedia strategy took quite a different route from the previously observed, for there were no cases, in 2017, of transmedia production and reception of Chilean works of fiction. There was, however, the creation of specific groups on Facebook, Twitter and Instagram, by the broadcasters and networks, through hashtags to motivate discussions on the content between the followers. This option only was demonstrated with show *Perdona Nuestros Pecados*, which created specific users in the networks for the protagonists. However, the most interesting Chilean example of audience interaction was the use of social media from one character of series *Soltera Otra Vez*, which ended in 2013, but kept the same accounts active. Last year, when they decided to make a new season, the accounts were reactivated and their shared content became richer, allowing for continuity to the three seasons aired and a larger space for advertisement.

Accordingly to this media ecosystem, **Colombia** has also not registered a true transmedia reception, with the creation of proper places to develop different narratives according to multiplatforms. As observed in other countries, in Chile, the space of interaction by excellence between the producers and the consumers are the social media platforms, and Facebook is the most popular one. It is important to highlight that in **Colombia** there was no creation of specific pages for the fiction products by the channels, but it is the audience itself who creates fan profiles with the name and content related to the products in question. Only the more independent sectors of production and content, like the documental universe, have been producing transmedia dynamics, like in the case of *Pasión: Otra Cara de Colombia*.

In the case of **Spain**, *Estoy Vivo* (La1), a show about cops with fantastic elements that became the leader in its time slot, was the fiction show that had the biggest activity in terms of transmedia characteristics. It was present in four official platforms: a Facebook page, a Twitter account, an Instagram profile and a video blog available on YouTube. To capture their audience even more and build

more content to engage the public, *Estoy Vivo* created a diverse strategy, with several products in several platforms, such as: a musical, “Bienvenido a la passarella”; a podcast that works as a six-episode prequel; and a videoblog “En la dimensión de Bea”. This way it was very interesting to realize that the chosen strategy has also contributed for the transmedia universe promoted by RTVE, which allowed the visualization of the weekly episodes and the search of content in different web platforms, improving the comprehension of the series, although it can be consumed autonomously.

On the other hand, the fiction that had the biggest attention in the **United States** for its transmedia products was *El Señor de los Cielos*, which was able to expand its narrative universe in a spin-off of the superseries, and the premiere of *El Chema*, as a free version of the life of Joaquín “El Chapo” Guzmán. It is in this narrative process of two distinct television products, with different timelines, that the main characters of *El Señor de los Cielos* are introduced to the great audience. This process broadens the characters’ universe, the paths and possible narratives that intercept in an intertextual level, offering a richer universe to the fictional product. At the same time, television corporations are following the same strategy of media synergies, with NBC-Universal of *El Señor de los Cielos* owning Telemundo, which broadcasted *El Chema*, which became the most viewed fictional show in 2017.

Contrarily to what happened in the United States, in **Mexico**, in 2017, there was no special interest to keep implementing a transmedia strategy; and when it actually happened (Televisa) it did not work with the audience, in opposition to what occurred in 2016 with series *Club de Cuervos*, which registered high popularity rates, with a great number of followers on social media and a lot of audience participation. This way, *Club de Cuervos* was considered the television product with the greatest transmedia game in **Mexico**, taking into consideration that the public is still not participating as creator of content, like in the cases of Brazil, Spain and the United States. Private televisions kept betting on the creation of pages on social

media, not to expand the stories they produce, but to help publicizing the product, as well as to get to know the audiences' preferences, although they are not very active. The new problem Mexican broadcasters have to face are the so-called influencers, who, through their YouTube channels, are able to reproduce television content, getting millions of views, particularly from a younger generation, getting this age group further and further away from TV.

Just as it has been referred in previous yearbooks, the precariousness and shyness with which **Peruvian** broadcasters deal with the appropriation of transmedia narratives and the use of internet platforms to conquer a new public and diversify the consumption of local productions is still a reality in 2017. What can be observed, however, is that Peruvian channels that invest in some of these strategies are, coincidentally, the ones that get higher audiences: América Televisión and Latina. Both have developed propositions to transcend the television arena and enjoy the possibilities that the internet has to offer and reaching a greater audience. However, to put these strategies in progress, América Televisión endangered the transparency commitment it had with the public: the processes that were previously free (since 2013) started to be charged in 2016, leading to a great distrust by the viewers, who protested the decision, which caused a significant decrease of audiences. Latina, on the other hand, by the beginning of 2017, announced that it would resume fiction production, and the result was series *Pensión Soto*. This was announced as the first fiction produced in Peru, whose premiere would happen on the internet and not on television. This decision provoked a privileged online access for that same purpose and, while internet audiences were good for the first episodes, the public got confused with the development of the story, as it happened simultaneously on television and online, which ended up provoking a certain discontentment on part of the viewers. This was, then, a counter-productive construction of a transmedia culture, for what was expected from the internet was to bring something complementary in terms of televised narrative, and not the same content.

In **Portugal**, the digital platforms are still being explored for transmedia processes in a shallow way, where products related to the telenovelas are only “adapted” for the internet and new supports. Just like it happened in previous years, fan interaction keeps happening only in the form of commentaries left on digital platforms. However, *Amnésia* (RTP) was, in 2017, the first truly transmedia manifestation that Portuguese television has ever seen. Producer be-Active created the first interactive series with the combined usage of platforms, like RTP Play, YouTube and Instagram. With a “Insta stories” format, the 12-episode crime thriller told and involved the viewers in the story of Joana Almeida, a young successful blogger who, in the morning of the release of her first novel, wakes up with Carlos, her boyfriend, dead next to her. This story was told on several platforms, with daily updates on Instagram, with photos, videos and other information, and it was able to captivate a younger audience and explore the narrative on several digital platforms. For the irreverence and transmedia nature of the project, it was chosen by The WIT for the panel “Fresh TV Around the World”, which took place in Cannes between October 16 and 19, 2017.

**Uruguay** kept the same analysis strategy from the previous year, with the application of the formula created by them to count the level of average engagement of fans in posts made by the production in an official page of the fictional product. The analyzed case was the official page of *El Mundo de Los Videos* and the official YouTube channel of TV Ciudad. The analysis revealed that the content produced does not appeal to user participation, but it tries to spread information throughout the platforms. One should also underline that, in the comparative analysis, the data related to YouTube interaction revealed that, for the same period of time, there was a bigger interaction between the participants in this platform than in the fictional product’s official website, as a bigger tendency to have longer and more complex texts posted by the users.

**Table 12. Transmedia reception of the Obitel countries**

Country	Fiction	Transmedia strategy	Type of fan transmedia participation	Level of transmedia implementation
Argentina	<i>Fanny, La Fan</i> (series)  <i>Las Estrellas</i> (series)	Official website  Facebook	Pictures Backstage videos VoD platform  Fans commentary on certain topics	1.0 Incipient  2.0 Mildly active by fans
Brazil	<i>A Força do Querer</i> (telenovela)	Twitter  YouTube	Commentary by fans on the most polemic characters according to the themes (gender equality, lifestyle, drug dealing)	2.0 Very active by fans  Active by part of the producer (Globo)
Chile	<i>Perdona Nuestros Pecados</i> (telenovela)	Facebook  Hashtags  Twitter  Instagram	Commentary by fans of certain themes  Creation of groups and new users by the followers of the product  Memes	2.0 Mildly active by fans
Colombia	<i>Pasión: Otra Cara de Colombia</i> (documentary)	Photo exhibition  Illustration exhibition  E-book  Web documentary  Official website  Facebook  Twitter  Vimeo  YouTube  Instagram	Commentary by fans on the discussed themes	2.0 Mildly active by fans
Spain	<i>Estoy Vivo</i> (series)	Facebook  Twitter  Instagram  Podcast  Videoblog/YouTube	Commentary on Facebook  No chance of contribution to change the narrative, creating different content	1.0 Incipient  Active by the producers

Mex-ico	<i>La Rosa de Guadalupe</i> (telenovela)	Facebook Twitter YouTube Instagram	Commentary on Face-book  Memes  Merchandising	2.0 Mildly active by fans
Peru	<i>Pensión Soto</i> (series)	Social media	Commentary	1.0 Incipient
Uru-guay	<i>El Mundo de los Videos</i> (series)	Official fan page YouTube	Fan page Commentary	1.0 Incipient
Ven-ezuela	<i>Para Verte Mejor</i> (telenovela)	Facebook Instagram  Twitter YouTube	Hashtags  Commentary  Flyers	1.0 Incipient

In the comparative of the results, it is essential that the broadcasters are honest in the way they use the transmedia narratives and their platforms. These should not be only mere echoes of television; they have to be explored taking into consideration a public that is getting closer to present day technology and less identified with the traditional TV consumption model. However, the results indicate that the majority of the countries is still sharing an experimental attitude towards transmedia, qualified with 1.0 level, which corresponds solely to the creation and maintenance of social media pages (Twitter, Facebook, Instagram and YouTube), to the sharing of news about chapters and episodes and advances in the story, images, videos interviews, and a very basic audience participation, who only comments and shares inputs given by the production. This interaction stems from the nature of each one of the referred social media networks, which does not allow for a greater diversity in terms of interaction. Contrarily to this, about half of the *Obitel* countries, like **Argentina, Brazil, Colombia, Chile** and **Mexico**, were already able to create different kinds of interaction with their audience, due to applications, videoblogs or other strategies that, in order to get a higher involvement with fans, allow the creation of content. We should stress out that none of the *Obitel* countries are risking at a



3.0 level, which would appeal to a larger participation from the users, who could then create expansions to the narrative and in other characters that could create different situations in distinct platforms.

It is also important to highlight the choice of some transmedia stories, like in the cases of **Colombia** and **Venezuela**, whose fiction stands out for mixing with reality. This narrative option has been more present in formats like series and documentaries, giving more chances for participation, once the relation of proximity with the themes triggers a higher will to be a part of the story.

When comparing with previous years, we can see that social networks, the main medium where interaction takes place between users, have suffered two important additions in the last year: Instagram and YouTube. They caused the producers to increase their platforms of content diffusion, but they are also places to captivate new audiences, particularly YouTube, which is the most popular social network among the younger generation.

From the obtained data, it is possible to say that most interactions between audiences and producers are made through the latter and not by fans. User participation is still very limited, not only by the constraints in terms of digital platforms, but also by all the possibilities that are left out by content producers who do not search or encourage for interaction, and only crave a limited reaction to know how their public behaves and how their products are received. This fact deserves a deeper reflection, already announced in previous year's comparative chapters, on the pertinence of these transmedia products. The results show that the broadcasters are not yet available to give up full control over the creative process; however, results show that the stories that are more interactive and allow a larger narrative openness are the ones that get more participation and captivate higher audiences.

## 5. Highlights of the year in Obitel countries

In general, the open TV channels are still undertaking strategies for fictional content, bearing in mind the maintenance of audiences,

specifically in terms of formats, genres and themes. The telenovela is still the most popular and usual format, with both **Brazil** and **Portugal** scheduling national titles in their access, prime time and night slots; **Argentina** is bringing back the melodramatic nature of stories and betting strongly on Turkish products, while, in **Peru**, these products are starting to lose audience, leading to the import of content from other “exotic” locations, like the Philippines, Korea, Romania or India. Notwithstanding, a parallel tendency could be observed for the decrease of serialized content, particularly by the hand of the public television services (**Argentina** and **Portugal**), but also in **Colombia**, in the **United States**, with the consolidation of the superseries, and in **Spain**, with the increase of the demand of content resulting from the penetration of VoD platforms. This path of appropriation of structural, technical and aesthetic resources, which is typical of the North American series of global penetration and success, made Chile, contrary to **Argentina**, break the typical melodramatic nature on the construction of telenovelas and introduce characteristics of the American series and superseries, just like in **Colombia**, **Spain**, **Portugal** and **Brazil**, particularly through cinematic visual effects, producing genres like thriller and crime stories. Still in relation to the genres, it was interesting to see that comedy was a strong presence in domestic content in **Brazil**, **Portugal** and **Colombia**, but it was absent from the **Argentinean** titles.

Social themes, based on socio-educational premises close to the realities of the receptors, were also relevant, mainly in products coming from **Brazil**, **Colombia**, **Mexico**, **Peru**, **Portugal**, **Uruguay** and **Venezuela**. They emphasized problems like gender roles (the role of women in society, empowering, domestic violence, transgender), as well as logics of violence and crime. Emphasis for the utilization of real characters/personalities in a mix of reality and fiction by Colombia and Mexico, and the latter explored the story of an earthquake victim, which happened in September 2017, under the title *Rescate de #FridaSofia*.

The media ecosystem of some of the Obitel countries has shown advances and setbacks of impact in the production of fictional content, like the analogic shutdown in **Brazil**, the non-promulgation of an equal ethics conduct to all channels in **Mexico**, the attribution of the award Autores to a telenovela for the first time in **Portugal**, or the effort by the government of **Venezuela** for the construction of works dedicated to the memory of late President Hugo Chávez, either on television, through series and documentaries, or in the movies, with feature films.

## 6. Theme of the year: Ibero-American TV fiction on video on demand platforms

The level of penetration of video on demand in the different countries shows variations; however, we can say that the new modalities of television viewing are beginning to take root, especially among the younger generations, even if at different speeds, contributing to a decrease of audiences on the free-to-air channels. Most of them have adopted the big international platforms, like Netflix (with **Mexico** standing out as the second most important market on a global scale), YouTube or Snapchat, as well as some national platforms that have been able to impose, such as Globo Play (**Brazil**), Loop 13 (**Chile**), Atresmedia Conect (**Spain**), Veo Play (**Mexico**), América TVGO (**Peru**), NPlay (**Portugal**), Vera TV (**Uruguay**) or Vivo Play (**Venezuela**); and the **United States** market is the most dynamic in this kind of offer (Netflix, Hulu, Amazon, HBO Now, CBS All Access, DirecTV Now, YouTube TV, Sling TV, PlayStation Vue). **Brazil** is one of the countries that produces the highest number of web content, while **Venezuela** is the country that is the furthest behind in terms of development of its platforms – the precarious economic situation set back the proliferation of international giants, like Hulu and Netflix, and the local platforms are scarce and do not produce their own content. The independent or state-sponsored production of fictional content could also be observed (for example, in **Argentina**, **Chile** and **Colombia**), as well as the growth of the power of the

telecommunication operators, who are, gradually, quitting playing the part of aggregators only and starting to have channels and their own fiction production (in **Spain**, with the case of Telefónica and channel Movistar+).

Taking into account what was exposed here, and as mentioned in the beginning of this chapter, two groups of countries were formed according to their digital development. So, in **Colombia, Chile, Peru, Portugal, Uruguay** and **Venezuela**, the production and consumption of fictional content emerged and/or became more expressive. In **Brazil, Spain, the United States** and **Mexico**, this dynamic found its way to consolidation.

The new screens are living in parallel with the traditional tiny screen, and, although an environment of competition is getting stronger, the telenovelas and domestic productions of linear broadcast still have the power to aggregate due to their ludic-affective function (Fuenzalida, 1996) and their capacity to narrate a nation, giving themes, rituals and motivating audience participation (Lopes, 2003, 2009). In the Obitel countries, we can also observe incongruence in the way to approach the online: it is either seen as an extension of television, or an autonomous space for the exploration of new formats, genres, themes and production companies. Because of this, analyzing the reconfiguration of media audiovisual ecosystems requires time and distance, so we can understand the dynamics of industrial production and individual reception, and understand how it is ever going to be possible to find the equilibrium taking into account what was, is and will be the nature of “television content”.

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## SECOND PART

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FICTION IN OBITEL COUNTRIES IN 2017



## ARGENTINA: THE YEAR IN WHICH NATIONAL FICTION DID NOT FIND ITS AUDIENCE<sup>1</sup>

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### 1. Argentina's audiovisual context in 2017

In 2017 the serial fiction offer found little echo in the audiences. Although they were produced and exhibited in a number similar to 2016 and the total hours increased, the audience did not accompany the titles. One of the reasons is that the political debate remains very strong in the media agenda, both because it is an election year and because of the information related to the cases of political corruption. The fiction of the Obitel field almost doubles the number of hours exhibited in national production, the offer of Turkish origin is maintained and a good number of titles are preserved thanks to the programming of miniseries on Televisión Pública Argentina. We can point out, as dominant figures of the national serial fiction production, stories that are narrated in fewer episodes and the inclusion of new topics, keeping the telenovela's generic pacts over other long-term fictions such as comedy and telecomedy.

The communications market in Argentina accentuates its historic concentration and promises to take it to unprecedented levels through the ongoing merger between monopoly telephone company Telecom and multimedia cable operator Clarín, Cablevisión. The

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<sup>1</sup> Obitel Argentina team thanks Kantar Ibope Media, because, without the information provided by them, it would not be possible to carry out the analyses presented here, as well as the collaboration of Leonardo Murolo in preparing the theme of the year about fiction on video on demand platforms in Argentina.

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media system is currently governed by two national laws intervened since late 2015 by decrees and resolutions that operate under a logic of *faits accomplis*, transforming the structure of the sector without the need to give parliamentary discussion of a new legal text.

**1.1. Open TV in Argentina**

The open television system in Argentina is made up of five networks with national coverage. TV Pública is part of the Federal System of Public Media and Content and is financed by contributions from the National Treasury, official publicity, taxes provided by the Law on Audiovisual Communication Services and other own resources. The other four networks have private commercial management.

**Chart 1. Open national television broadcasters in Argentina**

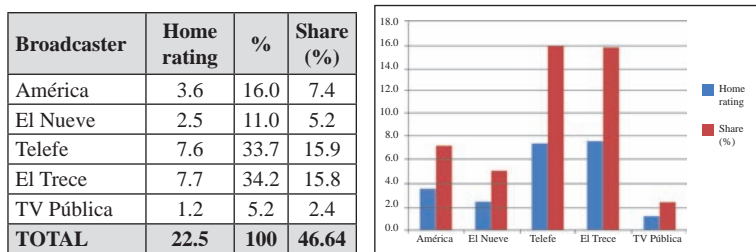
Private networks (4)	Public networks (1)
América 2 (channel 2) El Nueve (channel 9) Telefe (channel 11) El Trece (channel 13)	TV Pública (channel 7)
Total networks: 5	

Source: Obitel Argentina

Three of the networks have transmission to all the country through their respective repeaters: TV Pública, Telefe and El Trece. TV Pública is the one that covers the largest proportion of the national territory (99.5%). El Trece and Telefe cover all the provinces through direct ownership or by association with the main local stations. The five national networks broadcast their programming through cable television, mostly privately managed, although there is also an extensive network of pay TV cooperatives in the countryside. TV Pública depends on the directory of Argentine Radio and Television, State Society (RTA S.E.), which operates within the scope of the Federal System of Public Media and Content (SF-MyCP), created in 2015. América 2 is part of group América Medios. El Nueve is part of international group Albavisión, owned by

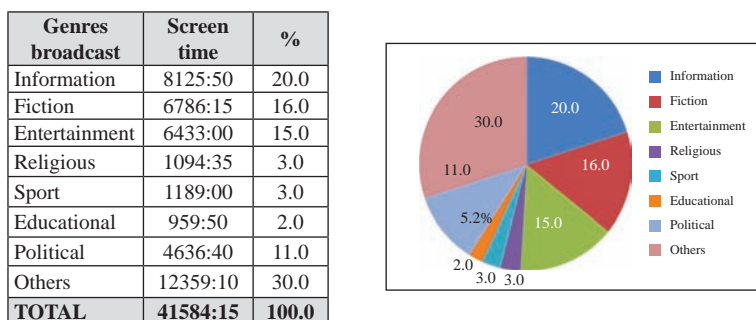
Mexican businessman Ángel González. Telefe became property of US company Viacom Inc.<sup>5</sup>, after Telefónica S.A. sold it, at the end of 2016, along with eight repeaters from the countryside for 345 million dollars. Holding company Clarín exploits El Trece. It owns newspapers, open channels, cable television networks nationwide, a digital TV company, internet service providers, a mobile phone company, etc. It is also co-owner of a news agency and the only newsprint factory, in addition to a significant number of companies outside the mass media.

**Graph 1. Audience and share per broadcaster**



Source: Kantar Ibope Media and Obitel Argentina

**Graph 2. Genres and hours broadcast on TV**



Source: Kantar Ibope Media and Obitel Argentina

<sup>5</sup> Viacom Media Networks has participation in cable signals Comedy Central, MTV, Nickelodeon, VH1 and Paramount Channel. Since 2017, the management has been in charge of Guillermo Campanini and Darío Turovelzky, both with experience in television and commercial management at Viacom.

During 2017, the open TV audience decreased (−4.6 rating points) and all channels lost audience. *Telefe* and *El Trece*, the two leading channels, tied the year, while *TV Pública* continues in the last position and losing viewers two years after the replacement of authorities. There is a slight increase in the informative genre due to the coverage of the electoral activity of the mid-term legislative elections.

## 1.2. Audience trends over the year

In general, all air channels lost audience in 2017 and the open TV decreased in its viewing. This happens in parallel to a constant increase in the participation of cable signals, which as a whole exceeded the open ones since 2014.<sup>6</sup> *Telefe* and *El Trece* ended the year in a technical draw. *Viacom*'s channel led the audience until the month of May, when *El Trece* launched, first, entertainment cycle *Showmatch*, one of the most watched show on TV, and then, in the same month, telenovela *Las Estrellas*, which became the most viewed national fiction of the year, raising the general average of the station.

*América TV* retained the third place with entertainment programming and live political discussion shows, but it lost one point in relation to the previous year. *El Nueve*, thanks to the transmission of a large number of long fictions from Ibero-America and some journalistic entertainment programs, achieves a lower but stable rating that stays between two and three points throughout the year. *TV Pública* accumulates a loss of more than 50% of the audience since the change of government, in December 2015, and in 2017 it reached its lowest level in the last ten years.

## 1.3. Advertising investments of the year: in TV and in fiction

By 2017, television continued to be the medium with the largest participation, representing 36% of advertising sales. On the other hand, advertising in digital media continued to grow and, by the end

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<sup>6</sup> See <http://www.lamac.org/argentina/metricas/share/>

of the year, represented 32% of total sales, above the regional average. Argentina is the second advertising market in Latin America, after Brazil, and it was estimated that during 2018 the local market had an expansion of over 25% driven by the FIFA World Cup.<sup>7</sup>

For its part, the national government continued to be the largest single investor and had brought to the market \$ 1,777,110,865 during the first six months of 2017, that is 6.5% more than the previous semester. Of this total, 36.5% went to open television, far from pay TV (+8.3%) and internet (−6.3%). This last data in particular contrasted with the behavior of private advertising that grows on the internet. Thus, analyzed by Espada and Marino (2017), the state becomes a key agent in the survival of some traditional media whose audiences fall, but not so the financing.<sup>8</sup>

#### 1.4. Merchandising and social merchandising

In 2017 there are no cases of products or cultural goods derived from television fiction. Among the most viewed series, two address social issues: *La Fragilidad de los Cuerpos* (El Trece) takes suicide as the starting point of its narration, while *Un Gallo para Esculapio* (Telefe) shows with cruelty the violence between rival bands on impoverished stages of the Buenosairean conurbano. To these we can add *Cartoneros* (El Nueve), which is set in the social and economic crisis of 2001. On the other hand, TV Pública returned to release miniseries with social themes, the majority produced in the previous years by means of the state promotion plans: *La Pulsera* addresses the world of house arrest; *Mis Noches Sin Ti*, set in 1947, recounts the tensions unleashed by Peronism and its rise to power; *Olimpia* shows sports as a path towards social inclusion and personal improvement; *Siete Vuelos* is about the search for true identity. The state channel also made the local adaptation of Spanish telenovela

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<sup>7</sup> Data from Magna Global annual report, retrieved by specialized portal Total Media. Available at <https://goo.gl/SpJx9p>

<sup>8</sup> Source: Espada, A. and Marino, S. (2017). Publicidad oficial 2017: concentrada y en aumento. *Revista Fibra*. Available at <http://revistafibra.info/publicidad-oficial-2017-concentrada-y-en-aumento/>

*Cuéntame Cómo Pasó*, reviewing the facts of Argentine history since the death of Perón, in 1974, until the return of democracy, in 1983, from the perspective of a middle class family.

## 1.5. Communication policies

As of December 2015, and with the argument of adapting the regulations in force to technological progress and digital convergence, the government modified central aspects of the laws of Audiovisual Communication Services (26.522) and Argentina Digital (27.078), especially those that set limits to the commercial treatment of communication resources, which in practice served to liberalize the activity and re-regulate it in favor of the largest private commercial players, generating the conditions for a greater concentration of ownership. At the same time, the political authority of the sector under the executive power was concentrated, for which the institutional architecture of pre-existing regulation and control was completely dynamited, limiting or eliminating the participation of civil society and a large group of interested parties.

This intervention, carried out mainly by way of presidential decrees, some of necessity and urgency, was presented as a transitory instance that would lead to the elaboration of a new bill. However, the commission created for these purposes has not submitted any proposal for new regulation after receiving numerous extensions since its creation, in April 2016.

In this context, during 2017 the modifications introduced in recent years became consolidated and permanent. A look at the current regulatory framework of the communications sector returns a fragmented image, composed of two national laws intervened by a growing tangle of decrees – some of them contradictory to each other – and other provisions of lower hierarchy, some emanating from a Ministry of Communications created in 2015 and already extinct, and others from the National Agency of Communications (ENaCom) – agency now under the Ministry of Modernization –, which replaced Afsca and Aftic, repeating in its directory a political

integration scheme, without selection according to professional suitability and with direct dependence on the executive branch.

At the end of 2016, Decree 1340 allows telephone companies to provide pay TV services as of January 2018; it also protects operators of new generation networks for 15 years and raises barriers against the entry of new competitors. At the end of 2017 ENaCom approved the merger between Telecom and Cablevisión (Grupo Clarín); all that remained was the decision – not binding – of the National Commission for the Defense of Competition (CNDC). If it happens, this merger will be the largest act of concentration in the history of communications in the country and it would lead to the largest telecommunications group in Argentina, gaining significant or dominant market power in several urban centers. Regarding open digital television (TDA), the government dismantled its content area and paralyzed the expansion of the physical transmission infrastructure. In two years, it inaugurated just six towers, putting in doubt the deadlines of the analogical blackout, originally planned for 2019.

## **1.6. ICT trends**

According to official figures, in the first semester of 2017 there were 7.4 million connections to residential broadband, an increase of 2.4% compared to the previous year, which represents a penetration of 16.8% of the population. The cost of average broadband subscription increased 40.6% in one year. In turn, there were deep inequalities in terms of penetration by provinces: while in the Autonomous City of Buenos Aires, it reached 52.2% of households, in provinces such as Formosa, Jujuy, Santiago del Estero and Catamarca it was around 5%. Nationwide, 60% of connections were up to 6 Mbps speed.<sup>9</sup>

There are 64.1 million mobile lines – although it is estimated that those actually in use are significantly lower –, 87.8% of which correspond to prepaid subscribers, generally users with lower pur-

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<sup>9</sup> Source: Report on Market Indicators of the 1st semester of 2017 of ENaCom. Available at [https://www.enacom.gob.ar/informes-de-mercado\\_p2877](https://www.enacom.gob.ar/informes-de-mercado_p2877)

chasing power. The cost of the second location for prepaid subscribers increased 66%, while the average postpaid subscription increased 25%. As of June 2017, there were 13,620 4G radio base stations in the country, almost the double of the previous year. Fixed telephony, following the global trend, is a mature market and in virtual stagnation for ten years: in 2017 there were 9.9 million active fixed lines, just above 2016.

Digital TV covers approximately 85% of the territory and has an estimated penetration of 7% of households.<sup>10</sup> The number of users who consume audiovisual content through the internet continues to grow.<sup>11</sup>

### **1.7. Public TV**

During 2017, the loss of audience and centrality in all media operated by the National State deepened. In the last stretch of the year, there were also budget cuts and reduction of the employee plant. Strengthened after the electoral triumph of October 2017, the government began to apply to public media the policy of “optimal endowments”, with which it seeks to reduce the number of employees throughout the public administration. Since then, the Federal System of Media and Public Content (SFMyCP) enabled the “voluntary” withdrawal (in some cases induced by the deterioration of working conditions), to which more than a hundred workers of public signals Encuentro, PakaPaka and DeporTV adhered. It also dropped almost 200 contracts in the area in charge of the TDA contents, a project that was virtually paralyzed. In the historic TV Pública, the cuts came shortly after the resignation of Horacio Levin, director of the channel named by the current management. In this case, the government publicly denounced a high level of absenteeism, salaries of privilege and overpopulation of employees;

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<sup>10</sup> Different studies carried out independently by the SInCA, the University of Quilmes and AR-SAT during 2013 and 2014 placed the penetration in 7% of households.

<sup>11</sup> Source: New Media Essentials report, from Business Bureau Consultancy. August 2017.

so, to the voluntary withdrawals, the announcement of a zero wage increase for 2018 was added, and TV Pública was eliminated from the news on weekends to reduce production costs.

## 1.8. Pay TV

According to data from Lamac, the penetration of pay TV per household in 2017 was 81%, just +0.8% than the previous year. This consultant estimated that about 4.2 million households had this service in the country.<sup>12</sup> Overall, pay TV signals accounted for 53.2% of television share, surpassing open television.<sup>13</sup>

Open TV channels try to set agreements with pay TV channels, international distributors and pay TV providers in order to co-produce potential series or miniseries, reducing risks and assuring more possibilities of international distribution. In this scheme, during 2017, they produced: *La Fragilidad de los Cuerpos* (Pol-ka and Turner International Argentina); *El Jardín de Bronce* (Pol-ka and HBO); *Divina en tu Corazón* (Pol-ka and Televisa); *El Maestro* (Turner, Cablevisión and Pol-ka); and *Un Gallo para Esculapio* (Telefe and TNT). The tendency seems to be a relief and for 2018 they announced the second seasons of: *Un Gallo para Esculapio* and *El Marginal* (Underground and Netflix); *El Lobbista* (El Trece, TNT and Cablevisión Flow); and a unitary produced by Fox Latinoamérica base on telenovela *Santa Evita* (1995), by Tomás Eloy Martínez.

## 1.9. Independent producers

Pol-ka, which is the producer associated to El Trece (Clarín Group), kept producing fiction for this channel along the year, while Underground and LCA Producciones were the ones that managed to insert fiction on open TV in association with Telefe. As mentioned

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<sup>12</sup> Source: Latin American Multichannel Advertising Council (Lamac). Available at: <http://www.lamac.org/argentina/metricas/total-por-tv-paga/>

<sup>13</sup> Source: Latin American Multichannel Advertising Council (Lamac). Available at: <http://www.lamac.org/argentina/metricas/share/>



before, during 2017, there was the consolidation of the model of co-production between independent producers, open and pay TV channels and operators, and international distributors. This way, local companies set production agreements with companies such as Turner, HBO, Televisa and TNT, among others, for the production of potential miniseries.

However, the crisis in the sector is maintained, due to the decrease of national fiction and the strong presence of international titles. Also, there is the unexpected result of high bet national fiction. This is the case of *Fanny, la fan* (Underground – Telefe), a comedy that was originally programmed to be aired in prime time, but, one month later its premiere, and after changing time slots twice, it started to be broadcast online, also resulting in low ratings.

1.10. International trends

As in previous years, the tendency of programming Turkish telenovelas and biblical transpositions from Brazil is maintained. Likewise, the denomination of season converges for the series and miniseries format, in a duration of less than one hour. Reality and entertainment programs whose format comes from abroad were incorporated.

2. Analysis of the year: national and Ibero-American premiere fiction

Table 1. Fiction broadcast in 2017  
(national and imported; premieres and reruns; co-productions)

<b>PREMIERE NATIONAL TITLES – 19</b>	<b>El Trece – 1 title**</b>
<b>Telefe – 5 national titles</b>	4. <i>Revancha</i> (telenovela – Colombia)
1. <i>Amar después de amar</i> (telenovela)	<b>El Nueve – 11 titles</b>
2. <i>Fanny, la Fan</i> (comedy)	5. <i>Amo Despertar Contigo</i> (cont. telenovela – Mexico)
3. <i>Golpe al Corazón</i> (telenovela)	6. <i>Amores con Trampa</i> (telenovela – Mexico)
4. <i>Por Amarte Así</i> (telenovela)	7. <i>Enamorándome de Ramón</i> (telenovela)
5. <i>Un Gallo para Esculapio</i> (series)	

<p><b>El Trece – 4 titles</b></p> <p>6. <i>El Maestro</i> (series)</p> <p>7. <i>La Fragilidad de los Cuerpos</i> (miniseries)</p> <p>8. <i>Las Estrellas</i> (telenovela)</p> <p>9. <i>Quiero Vivir a tu Lado</i> (telenovela)</p> <p><b>El Nueve – 1 title</b></p> <p>10. <i>Cartoneros</i> (miniseries)</p> <p><b>América – 0 titles</b></p> <p><b>TV Pública – 9 titles</b></p> <p>11. <i>Animadores</i> (miniseries)</p> <p>12. <i>Balas Perdidas</i> (miniseries)</p> <p>13. <i>Cuéntame Cómo Pasó</i> (telenovela)</p> <p>14. <i>La Pulsera</i> (miniseries)</p> <p>15. <i>Los Rampante</i> (miniseries)</p> <p>16. <i>Mis Noches Sin Ti</i> (miniseries)</p> <p>17. <i>Olimpia</i> (miniseries)</p> <p>18. <i>Siete Vuelos</i> (miniseries)</p> <p>19. <i>Vida de Película</i> (miniseries)</p> <p><b>CO-PRODUCTIONS – 4</b></p> <p>1. <i>Divina</i> (miniseries – Argentina/Mexico)</p> <p>2. <i>El Regreso de Lucas</i> (telenovela – Argentina/Peru)</p> <p>3. <i>Kally's Mashup</i> (miniseries – Argentina/Mexico)</p> <p>4. <i>Supermax</i> (series – Argentina/Brazil)</p> <p><b>PREMIERE IMPORTED TITLES – 16</b></p> <p><b>Telefe – 3 titles*</b></p> <p>1. <i>Josué y la Tierra Prometida</i> (telenovela – Brazil)</p> <p>2. <i>Los Milagros de Jesús</i> (cont. series – Brazil)</p> <p>3. <i>Moisés y los Diez Mandamientos</i> (cont. telenovela – Brazil)</p>	<p>– Mexico)</p> <p>8. <i>La Doble Vida de Estela Carrillo</i> (telenovela – Mexico)</p> <p>9. <i>La Rosa de Guadalupe</i> (cont. unitary – Mexico)</p> <p>10. <i>Mi Adorable Maldición</i> (telenovela – Mexico)</p> <p>11. <i>Muchacha Italiana Viene a Casarse</i> (cont. telenovela – Mexico)</p> <p>12. <i>Sin Senos Sí Hay Paraíso</i> (telenovela – Colombia/USA)</p> <p>13. <i>Tres Veces Ana</i> (cont. telenovela – Mexico)</p> <p>14. <i>Un Camino Hacia el Destino</i> (telenovela – Mexico)</p> <p>15. <i>Vino el Amor</i> (telenovela – Mexico)</p> <p><b>TV Pública – 1 title</b></p> <p>16. <i>Celia</i> (cont. telenovela – Colombia)</p> <p><b>RERUNS – 1</b></p> <p><b>Telefe – 7 titles</b></p> <p>1. <i>Casados con Hijos</i> (comedy – Argentina)</p> <p><b>El Trece – 0 titles</b></p> <p><b>América – 0 titles</b></p> <p><b>El Nueve – 0 titles</b></p> <p><b>TV Pública – 0 titles</b></p> <p><b>TOTAL PREMIERE TITLES: 39</b></p> <p><b>TOTAL RERUNS: 1</b></p> <p><b>GENERAL TOTAL TITLES: 40</b></p>
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\* Telefe aired two Turkish telenovelas: *El Sultán* and *Tiempo de Amar*.

\*\* El Trece aired two Turkish telenovelas: *Esposa Joven* (cont.) and *Medcezir*; and a Hindu one: *Saras & Kumud* (cont.)

Source: Kantar Ibope Media and Obitel Argentina

In 2017, 39 titles were released, three fewer than in 2016; the number of repetitions also dropped. Like the previous year, Telefe and El Trece released nine fictions of their own. They also partici-

pated in four co-productions with countries in the Obitel field. Out of the Obitel field, four Turkish and one Hindu fiction were issued.

**Table 2. Premiere fiction in 2017: countries of origin**

Country	Titles	%	Chapters/ episodes	%	Hours	%
<b>NATIONAL (total)</b>	<b>19</b>	<b>48.7</b>	<b>593</b>	<b>30.1</b>	<b>640:00</b>	<b>32.1</b>
<b>OBITEL COUNTRIES (total)</b>	<b>15</b>	<b>38.5</b>	<b>1184</b>	<b>60.1</b>	<b>1171:10</b>	<b>58.7</b>
<b>Argentina</b>	19	48.7	593	30.1	640:00	32.1
<b>Brazil</b>	3	7.7	203	10.3	243:40	12.2
<b>Chile</b>	0	0.0	0	0.0	0:00	0.0
<b>Colombia</b>	2	5.1	30	1.5	31:40	1.6
<b>Ecuador</b>	0	0.0	0	0.0	0:00	0.0
<b>Spain</b>	0	0.0	0	0.0	0:00	0.0
<b>USA (Hispanic production)</b>	0	0.0	0	0.0	0:00	0.0
<b>Mexico</b>	10	25.6	951	48.3	895:50	44.9
<b>Peru</b>	0	0.0	0	0.0	0:00	0.0
<b>Portugal</b>	0	0.0	0	0.0	0:00	0.0
<b>Uruguay</b>	0	0.0	0	0.0	0:00	0.0
<b>Venezuela</b>	0	0.0	0	0.0	0:00	0.0
<b>CO-PRODUCTIONS (total)</b>	<b>4</b>	<b>10.3</b>	<b>123</b>	<b>6.2</b>	<b>115:50</b>	<b>5.8</b>
<b>Argentinian co-productions</b>	<b>1</b>	<b>2.6</b>	<b>69</b>	<b>3.5</b>	<b>66:30</b>	<b>3.3</b>
<b>Co-productions between Obi- tel countries</b>	<b>5</b>	<b>12.8</b>	<b>192</b>	<b>9.8</b>	<b>182:20</b>	<b>9.1</b>
<b>TOTAL</b>	<b>39</b>	<b>100.0</b>	<b>1969</b>	<b>100.0</b>	<b>1993:30</b>	<b>100.0</b>

Source: Kantar Ibope Media and Obitel Argentina

The number of national premieres increases from 16 to 19 in relation to 2016. As a counterpart, the fictions of the Obitel field fall from 25 to 15 due to changes in the policy of El Nueve, which programmed fewer foreign telenovelas in its afternoons. In general, the amount of chapters issued from all origins falls by 32%, but the number of hours remains constant due to the presence of long-term titles. The co-production is gaining ground and this year four titles in which Argentina participates with companies such as Turner, Televisa and TNT were released.

The privilege of national fiction is maintained in prime time. The novelty is the growth of Ibero-American fictions during this time, although its privilege remains in the afternoon hours.

Table 3. Chapters/episodes and hours broadcast by time slot

Time slot	National			Ibero-American			Total		
	C/E	%	H	%	C/E	H	%	C/E	H
Morning (6:00-13:00)	17	2.4	12:30	1.7	0	0:00:00	0.0	17	12:30
Afternoon (13:00-21:00)	160	22.3	153:50	20.4	981	927:30	74.9	1141	1081:20
Prime time (21:00-24:00)	539	75.3	589:30	78.0	272	310:10	25.1	811	899:40:00
Night (00:00-06:00)	0	0.0	00:00	0.0	0	0:00:00	0.0	0	0:00:00
Total	716	100.0	755:50	100.0	1253	1237:40	100.0	1969	1993:30

\* Co-production titles are included in the national calculation

Source: Kantar Ibope Media and Orbitel Argentina

Table 4. Formats of national and Ibero-American fiction

Format	National			Ibero-American		
	Titles	%	C/E	H	%	Titles
Telenovela	7	30.4	523	73.0	562:55	16
Series	3	13.0	70	9.8	67:45	0
Miniseries	12	52.2	112	15.6	112:20	0
Telefilm	0	0.0	0	0.0	0:00:00	0
Unitary	1	4.3	11	1.5	12:50	0
Docudrama	0	0.0	0	0.0	0:00:00	0
Others (soap opera, etc.)	0	0.0	0	0.0	0:00:00	0
Total	23	100.0	716	100.0	755:50	16

\* Co-production titles are included in the national calculation.

Source: Kantar Ibope Media and Orbitel Argentina

Although national fiction maintains its pre-eminence, it is reduced by 15% in prime time, part of which moves to the afternoon slot. The titles of the Obitel field predominate in the afternoon as in the previous year. For the second year in a row, the national telenovela increases in number of titles, episodes and hours broadcast. The presence of the miniseries is duplicated due to the policy of TV Pública, which reprogrammed premieres, and because of the national co-productions of Telefe and El Trece also in this format. Regarding Ibero-American premiere fiction, the predominance of telenovela is maintained.

**Table 5. Formats of national fiction by time slot**

Format	Morning	%	Afternoon	%	Prime time	%	Night	%	Total	%
<b>Telenovela</b>	0	0.0	2	33.3	5	31.3	0	0.0	7	30.4
<b>Series</b>	1	100.0	1	16.7	1	6.3	0	0.0	3	13.0
<b>Miniseries</b>	0	0.0	3	50.0	9	56.3	0	0.0	12	52.2
<b>Telefilm</b>	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
<b>Unitary</b>	0	0.0	0	0.0	1	6.3	0	0.0	1	4.3
<b>Docudrama</b>	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
<b>Other (soap opera, etc.)</b>	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
<b>Total</b>	<b>1</b>	<b>100.0</b>	<b>6</b>	<b>100.0</b>	<b>16</b>	<b>100.0</b>	<b>0</b>	<b>0.0</b>	<b>23</b>	<b>100.0</b>

\* Co-production titles are included in the national calculation.

Source: Kantar Ibope Media and Obitel Argentina

Although national premiere fiction continues to dominate prime time, it was reduced by 30% in this time slot, while the premieres in the afternoon tripled, a segment in which most of the Obitel titles are also programmed.

**Table 6. Time period of national fiction**

Period	Titles	%
Present	20	87.0
Period	2	8.7
Historical	1	4.3
Others	0	0.0
Total	23	100.0

\* Co-production titles are included in the national calculation

Source: Kantar Ibope Media and Obitel Argentina

The predominance of national fiction set in the present is maintained. However, two period miniseries and a telenovela by TV Pública that replenishes historical facts in its plot stand out.

**Table 7. The ten most watched titles: origin, rating, share**

Title		Country of original idea or script	Channel	Format/genre	N. of chap./ep. (in 2017)	Rating	Share
1	<i>Moisés y los Diez Mandamientos</i>	Brazil	Telefe	Telenovela/drama	25	Prime time	15.3
2	<i>Las Estrellas</i>	Argentina	El Trece	Telenovela/drama	154	Prime time	14.9
3	<i>Josué y la Tierra Prometida</i>	Brazil	Telefe	Telenovela/drama	170	Prime time	12.7
4	<i>Amar Después de Amar</i>	Argentina	Telefe	Telenovela/drama	70	Prime time	12.1
5	<i>Golpe al Corazón</i>	Argentina	Telefe	Telenovela/drama	64	Prime time	10.7
6	<i>La Fragilidad de los Cuerpos</i>	Argentina	El Trece	Miniseries/suspense	8	Prime time	10.4
7	<i>Los Milagros de Jesús</i>	Brazil	Telefe	Miniseries/drama	8	Prime time	10.2
8	<i>Fanny, la fan</i>	Argentina	Telefe	Telenovela/comedy	18	Prime time	10.2
9	<i>Quiero Vivir a tu Lado</i>	Argentina	El Trece	Telenovela/comedy	77	Prime time	9.9
10	<i>Un Gallo para Esculapio</i>	Argentina	Telefe	Miniseries/drama	9	Prime time	9.8
Total productions: 10				Foreign scripts: 3			
100%				30%			

Source: Kantar Ibope Media and Obitel Argentina

**Table 7a. The ten most watched national titles**

	Title	Country of original idea or script	Channel	Format/genre	N. of chap./ep. (in 2017)	Rating	Share
1	<i>Las Estrellas</i>	Argentina	El Trece	Telenovela/drama	154	14.9	22.9
2	<i>Amar Después de Amar</i>	Argentina	Telefe	Telenovela/drama	70	12.1	20.9
3	<i>Golpe al Corazón</i>	Argentina	Telefe	Telenovela/drama	64	10.7	18.8
4	<i>La Fragilidad de los Cuerpos</i>	Argentina	El Trece	Miniseries/suspense	8	10.4	18.0
5	<i>Fanny, la Fan</i>	Argentina	Telefe	Telenovela/comedy	18	10.2	15.5
6	<i>Quiero Vivir a tu Lado</i>	Argentina	El Trece	Telenovela/comedy	77	9.9	17.5
7	<i>Un Gallo para Esculapio</i>	Argentina	Telefe	Miniseries/drama	9	9.8	21.0
8	<i>El Maestro</i>	Argentina	El Trece	Miniseries/drama	12	9.6	17.9
9	<i>Por Amarte Así</i>	Argentina	Telefe	Telenovela/drama	25	6.9	16.4
10	<i>El Regreso de Lucas</i>	Argentina	Telefe	Telenovela/drama	61	6.6	15.2
<b>Total productions: 10</b>				<b>Foreign scripts:</b>			
100%				0%			

Source: Kantar Ibope Media and Obitel Argentina

In relation to 2016, the average rating and share of the ten most watched titles remains constant, as well as the proportion in national and Brazilian fictions that make up the list. As in the previous year, Telefe issued seven of the ten most watched fictions. Among the national ones, we highlight the entry into the top ten of three co-production miniseries and a telenovela (*Fanny, la Fan*, Telefe) that was lifted from the air by low rating.

Regarding the dominant themes of the top ten fiction programs, the interest in biblical dramas and religious themes continues. The national telenovelas cover more common themes such as union, the importance of family, betrayal and the search for love. The miniseries of co-production risk in their themes and approach from suicide and the exploration of sexuality to a realistic portrait of marginality and social conflicts. The social issues related to violence are in line

with the news and political agenda, which presents an important growth of the social debate on gender violence and trafficking in persons.

**Table 8. Audience profile of the ten most watched titles:  
gender, age, socioeconomic status**

Title		Channel	Gender %		Socioeconomic status %			
			Women	Men	ABC1	C2	C3	D
1	<i>Moisés y los Diez Mandamientos</i>	Telefe	58.3	41.7	11.0	20.4	30.1	38.6
2	<i>Las Estrellas</i>	El Trece	56.5	43.5	21.5	24.7	26.9	27.0
3	<i>Josué y la Tierra Prometida</i>	Telefe	60.3	39.7	12.7	19.2	30.7	37.3
4	<i>Amar Después de Amar</i>	Telefe	63.0	37.0	24.2	18.4	27.5	29.9
5	<i>Golpe al Corazón</i>	Telefe	61.3	38.7	14.0	17.4	29.6	39.0
6	<i>La Fragilidad de los Cuerpos</i>	El Trece	55.8	44.2	24.2	22.4	27.2	26.3
7	<i>Los Milagros de Jesús</i>	Telefe	56.7	43.3	17.1	18.4	25.7	38.7
8	<i>Fanny, la Fan</i>	Telefe	60.1	39.9	19.7	13.2	31.2	35.9
9	<i>Quiero Vivir a tu Lado</i>	El Trece	59.6	40.4	12.4	31.7	25.9	29.9
10	<i>Un Gallo para Esculapio</i>	Telefe	53.1	46.9	12.6	18.5	31.7	37.2

Title		Channel	Age group %				
			4-12	13-18	19-24	35-44	45+
1	<i>Moisés y los Diez Mandamientos</i>	Telefe	19.4	22.4	21.1	19.5	17.6
2	<i>Las Estrellas</i>	El Trece	13.9	23.8	25.0	21.7	15.7
3	<i>Josué y la Tierra Prometida</i>	Telefe	18.9	19.4	21.6	19.2	20.9
4	<i>Amar Después de Amar</i>	Telefe	14.8	25.8	24.1	20.1	15.3
5	<i>Golpe al Corazón</i>	Telefe	17.2	18.9	22.2	22.0	19.6
6	<i>La Fragilidad de los Cuerpos</i>	El Trece	11.3	23.4	24.7	26.0	14.5
7	<i>Los Milagros de Jesús</i>	Telefe	18.3	22.2	20.8	20.1	18.7
8	<i>Fanny, la Fan</i>	Telefe	24.1	18.2	21.5	18.5	17.7
9	<i>Quiero Vivir a tu Lado</i>	El Trece	17.6	22.7	18.2	22.5	19.0
10	<i>Un Gallo para Esculapio</i>	Telefe	13.1	21.1	18.1	26.2	21.4

Source: Kantar Ibope Media and Obitel Argentina



The audience profile of the top ten is composed mostly of women. There was a slight increase of 2.4% in the audience of ABC1 segment compared to the previous year. The outstanding figure is the greater aging of the spectators: there is a fall of 6% in the age groups from 4 to 24 years in relation to 2016 and, as a counterpart, a similar increase in audience share of +35 years.

### 3. Transmedia reception

In general terms, the transmedia reception of fiction in Argentina does not present particularly noteworthy actions since the main open television signals do not establish links that go beyond a series of referrals to the series itself, feeding the social networks in such a way that, in turn, they feed the visualization on the television screen. In the field of nonfiction, however, the activity of viewers in different spaces presents a more creative and online response to events. In the field of information, in general, and sports and politics, in particular, the production of memes and videos that rework what is displayed is of great importance.

However, in the year under study, transmedia production and reception in our country maintains the usual spaces, especially on social networks (Facebook, Twitter, Instagram) and the websites of television signals. It is interesting to highlight some cases. On the one hand, a failure, that of *Fanny, la Fan*, which, as previously mentioned, due to low rating, was lifted from the daily broadcast on Telefe to be programmed on the network's website. However, despite being a series aimed at an adolescent audience, it was not successful either in a viewing on demand, and on its official Facebook page it only had 19 thousand followers. It is a story in which transmedia production could have been explored, due to the meta-discursive character that it entailed. The main character, president of a telenovela actor's fan club, manages to integrate as a producer the fiction about vampire teenagers that he stars, where love will grow between them. The potential spinoffs of both *Twilight* stories that are parodied in the series and the behind-the-scenes games would

allow for greater forms of fictional expansion. However, not only did these forms of “hooking” with the audience not take advantage, but the passage of the show to the web conspired against these developments. On the official page of the TV station only photos and videos of the backstage are offered, as well as some videos of the actors greeting the community that follows them. The VoD platform has more ways to access the chapters and their summaries than a true transmedia expansion.

The other case of transmedia reception that is interesting to note is *Las Estrellas*, the most watched fiction of the year, which presents the story of the five daughters of Mr. Estrellas, who upon dying gives them a hotel, which they decide to manage together. Throughout the story, one of the sisters will discover her gay sexual preference. In national fictions of previous years, this subject and mode of treatment have been well considered by the audience. In the transmedia reception, certain critical participations begin to appear more strongly, showing distance between the insistence of fiction in the development of the story and positions of the audience. Within the responses to the posting of the couple of women about Valentine, there are, among others, comments such as:



Source: Facebook page El Trece – Las Estrellas

In this way, we find that the fictions and proposals generated from the networks that produce the most fiction present a certain disorientation regarding the direction of the audience. In contrast, it is interesting to tell the case of a fiction that has jumped, this year, from the video on demand platforms to the television screen. This

happened with *Animadores* (available until the beginning of 2016 in the Audiovisual Bank of Argentine Universal Content – Bacua). Winner of one of the federal contests (Prime Time 2013 contest), it was programmed in the prime time of Televisión Pública Argentina. This inverse passage is interesting since its broadcast on the television screen revived its views on YouTube and fed back the comments that are enabled there.<sup>14</sup>

#### 4. Highlights of the year

In 2017 strategies are defined to maintain the audience of fictions in open television. With this objective, a large part of the programming and the audience turn to the narrations linked to the classical melodramatic matrix. In this context, the Turkish telenovelas, the Brazilian productions from Record and the Mexican productions from Televisa cover most of the programming hours, and in the first two cases they call the largest audiences. Faced with this difficult scenario, national producers and open television networks propose different strategies. Private channels with a lower audience level (América and El Nueve) do not give space to Argentine fictions in their programming. The first did not issue any because it was focused on entertainment and information, away from fiction. The second, although occupying big part of its time with fiction of Mexican origin, barely aired, in a marginal hour, a national miniseries produced by state development fund.

For its part, TV Pública continues with the exhibition of eight miniseries produced in previous years thanks to the state funding, in which issues of social inclusion, problems of identity and the relationship between historical episodes and the lives of the leading characters are themed. In 2017, the public signal addressed the production of a version of Spanish television classic *Cuéntame Como Paso*, set in Argentina during the traumatic period that goes from

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<sup>14</sup> It should be noted that the fictions financed by the State in the Bacua are no longer available; the chapters are uploaded to YouTube by non-institutional users. The possibility of interaction is not available on the channel's website.

1974 (the death of President Perón) until 1983 (the democratic recovery). Despite the production effort made, the telenovela did not exceed the low levels of audience that the state network has.

El Trece, although it issued three fictions of Turkish origin outside prime time or during the low season, continued to grant a central spot to Pol-ka's production programs. However, in 2017 there was a renewal in the offer. The two daily programs (drama *Las Estrellas* and comedy *Quiero Vivir a tu Lado*) were produced exclusively by Pol-ka, as has been happening in recent years. The two weekly series (*El maestro* and *La Fragilidad de los Cuerpos*) were co-produced with international network TNT, being broadcast simultaneously by the cable signal at a different time. The four fictions were shown during prime time with unequal luck. While telenovela *Las Estrellas* was the most watched national production program, comedy *Quiero Vivir a tu Lado* did not meet previous expectations and was suspended earlier than planned. Series *El Maestro*, interpreted by Julio Chavez (the usual protagonist of this type of Pol-ka programs), did not reach the top ten of the national productions, but miniseries *La Fragilidad de los Cuerpos* had a greater impact, although limited within the low audience levels of Argentine fiction. Within the programming of El Trece there is a fall of comedy (until a few years ago, the most popular fiction genre) and a greater interest in miniseries than in traditional series. The greatest fortune can be attributed to programs that, while preserving generic conventions (love with difficulties, problems of identity), introduce renewed themes such as crossed couples, homosexual love, new views on motherhood or child exploitation.

Telefe, on the other hand, reached the highest levels of audience in fiction thanks to the biblical stories of Record (*Moisés y los Diez Mandamientos*, *Josué y la Tierra Prometida* and *Los Milagros de Jesús*) and also placed most of its national fiction production in the national top ten. It co-produced series *Un Gallo para Esculapio*, with Underground and TNT, and comedy *Fanny, la fan*, with Underground. Also it produced telenovela *ADDA. Amar Después de Amar*

and bought telenovelas *Golpe al Corazón* (from LCA) and *Por Amarte Así* (from Cuarzo and Televisa). The failure of *Fanny, la fan* expresses the fall of the interest for the local comedy and the success of the most conservative variants of the telenovela linked to its classic matrix. The exception is series *Un Gallo para Esculapio*, which, with a view to a wider international audience, places its story in environments of marginality and poverty where cockfighting introduces a new content for the stories of Argentine television. In turn, telenovela *ADDA. Amar Después de Amar* captures the attention of the audience by starting a story in two different times articulated by a plot that seeks the resolution of the murder of the protagonist couple. Focused on an exchange of couples, with lost and recovered identities, it renews the classic themes of telenovelas.

In general, it is possible to consider some common strategies in the main national productions, such as the tendency of formats reduction, approaching new themes maintaining the classical melodramatic narratives, and the abandonment of comedy.

## **5. Theme of the year: TV fiction on video on demand platforms**

Two elements are fundamental to understand the panorama of fiction on video on demand (VoD) platforms. On the one hand, there is the concentration of companies that offer internet, telephony and television services, facilitated by the regulations promoted by the government since December 2015. During 2017, this process is concreted with the purchase of Telefe by Viacom, defining a project from a multiscreen perspective, where internet platforms appear as a fundamental axis. At the same time, El Trece directs part of its fiction production by partnering with international cable networks and platforms.

On the other hand, with the passing of the years, the fall in the rating of fictions broadcast by open television and the increase in the consumption of audiovisual stories through streaming on demand are verified simultaneously. As of 2011, the massification of home broadband connections is consolidated, and Netflix operations begin

in Argentina. This platform had a slow start, but, according to data collected in the New Media Essentials report, from Business Bureau Consultancy, by August 2017 it had reached 847,458 unique subscribers, leading the video on demand segment. It was followed by: Cine.ar Play (624,144), owned by the state; Telefónica's On Video service (121,065); and national capital platform QubitTV (49,850). Despite these advances, the prophecies about the end of television are not yet fulfilled. A survey conducted by Eugenia Mitchelstein and Pablo Boczkowski (2017) define the three main cultural consumptions: 51% choose television; 37%, music; and 26%, social networks. The same survey shows a lower prevalence of television in the sectors of greater purchasing power.

While the trend of commercial production is oriented towards the stories for VoD, the serial narrative of the internet does not originate either in the networks or in the producers of open TV. The first webseries made in Argentina started experimentally. Some of the most important were independent productions such as *Plan V* (2009), *Yo Soy Virgen* (2010), *Un Año sin Televisión* (2011) or *Doble Click* (2012). This is how some producers were born, interspersing their work in webseries with advertisements, short films and video clips such as Tangram, Dontask, Macaco Films or Soleado Films. Within this context, telephone companies and various organizations made serial stories for the internet that continued their television logic and publicized services or products such as *La Pareja del Mundial* (2010), sponsored by Clarín, Movistar and Garbarino, and *El Rastro* (2011), with Renault as sponsor. These bets served to rehearse formal aspects and a narrative that manages a rhythm and duration of its own. A later stage shows the appearance of websites and YouTube channels in which Argentine fiction series occupy an important space, such as UN3TV (from the National University of Tres de Febrero), FWTV (a private web channel dedicated to entertainment) or Cine.ar Play (from INCAA) (Murolo, 2018).

On the basis of these years of experience, open TV networks and their associated producers begin to guide their fictional produc-

tion towards stories suitable for video on demand. Thus, producer Pol-ka launched in 2015 the first fiction for the web, *Igual te Quiero*, which extended to one of the stories addressed in television fiction *Esperanza Mia*, broadcast by El Trece that same year. In 2016, Telefe released *Primera Cita*, a specific content for the internet. In 2017, Telefe produced for its website *La Búsqueda de Laura*, a series of 18 episodes of five minutes, an independent story and at the same time complementary to the main plot of telenovela *Amar Después de Amar* (broadcast on television). In addition, it distributed the six-episode web miniseries *Secretarias*.

In relation to the financing of VoD fictions, the business model is diffuse and is in the process of being transformed. In principle, state promotion played a key role. Since 2010, in the operative framework of the Argentine Digital Terrestrial Television System (SATVDT), the national government financed the production and acquisition of audiovisual content through different lines of national (Incaa) and provincial (Buenos Aires Web Festival, Festival Graba de Mendoza, Espacio Santafesino, etc.) contests, in which producers with or without previous background participated. The Operative Plan for the Support and Promotion of Digital Audiovisual Content for TV carried out 43 contests and distributed 573 subsidies, of which 267 productions (series, animations, short films and documentaries) were equivalent to 1,521 hours of content. Some of them were programmed by private channels from the City of Buenos Aires and the countryside and by public channels, while others were not broadcast on television. Most of the productions were hosted at the Audiovisual Bank of Argentine Universal Content (Bacua), a repository that distributed 12 thousand hours of programming to 74 public and private channels from all over the country. In turn, Bacua created Contenidos Digitales Abiertos (CDA), a free web platform designed as an online exhibition window. However, this VoD platform has been offline since October 2016, so that fictions produced through state promotion are not available for public access. As an alternative, public platform Cine.ar Play – launched in 2015 by the

National Institute of Cinema and Audiovisual Arts (Incaa) and state company Arsat – works as an exhibition window for national series and films. However, at present, it does not include public promotion series in its catalog and it maintains an offer that highlights the hits of private television, also giving the pay-per-view possibility for national film premieres.

From the point of view of government policy regulation, guidance has not yet defined a strategy for State intervention, except concerning the tax regime. In 2017, a Tax Reform was approved, which charges diverse digital services with the value added tax of 21%, including streaming. With regard to the state role, the subsecretary of regulation of the ICT Secretary (Ministry of Modernization), Oscar González, proposes to abandon the television regulation model, supporting the existence of a sectoral consensus contrary to any type of prior state intervention in the OTT. Following this position, in 2017 the Ministry of Communications prepares a preliminary draft resolution that maintains that the provision of OTT services does not require a license, authorization, permit or registration of any kind. Silvana Giudici, coordinator of the drafting commission for the new Communications Law and director of the National Communications Agency, believes that OTT should be considered in future regulation. In this sense, it takes into account the need to promote and protect national audiovisual contents. The legislative field saw the presentation of a project that extends to the providers of audiovisual services in VoD the tax of 10% that makes up the fund foreseen in the Law of Promotion to the cinematographic activity. The initiative was approved by the Culture Committee of the Chamber of Deputies and awaits its treatment. At the moment, no minimum agreements are observed, even within the sector's application body (Baladron and Rivero, 2017).

So far, the bulk of national webseries has been developed outside of television production. There are few transmedia narratives that articulately use social networks and open or cable television. In this sense, it is worth highlighting UN3TV experience. It is the first



signal with national reach through the open digital television platform (or its inclusion in the programming of different cable operators throughout the country). At the same time, the project develops a web platform through which all its streaming programs can be accessed freely. Most of the contents that are hosted on UN3TV and circulate on television are fiction and non-fiction webseries, for whose production the university provides resources to independent producers, who develop content with an aesthetic proposal and a novel narrative that points to ways of consumption characteristic of social networks. Several serial fictions (*Un Año Sin Amor*, *Tiempo Libre*, *Depto*) have the traditional webseries format. They present a linear narrative structure, without the capacity for expansion or modification of the universes through the intervention of the spectators. Each chapter does not run for more than ten minutes, the plot is developed from few characters and in few locations. However, other programs have a strong link with forms of audiovisual narration of the web: videoblogs, youtubers or influencers. Some fictions focus on personalities from the web. For example, series *Mundillo*, written and starred by youtuber and “estandapera” Malena Pichot, which tells a story with delirious characters who live in a nursery; or *Cumbia Nena*, which arises from the proposal of two youtubers of the same name who perform acoustic covers of recognized songs of Argentine cumbia. The webseries *Retwittube* is a story where the content of social network Twitter is transformed into short fictional chapters triggered by different users’ tweets. For its part, the programs of director Esteban Menis (*Un Mundo Horrendo* and *Dilemas Existenciales*) present a proposal halfway between docu-reality and fiction, whose themes and humor can be perceived as extensions of the content that the protagonist generates on Instagram. These are mixed with comic sketches, docu-reality, webseries and stand-up. The content of the stories, the tone and the protagonists of UN3TV expand the narrative universe of social networks and generate new forms that express the convergence between platforms and new media. The convergence of media implies a type of transmedia narra-

tive that traces forms of consumption and formats, along with a new approach to audiovisual genres, aesthetics and arguments of fiction.

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## 2

# BRAZIL: DYNAMICS OF TELEVISION FICTION IN THE MULTICHANNEL TRANSITION<sup>1</sup>

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### 1. Brazil's audiovisual context in 2017

Within a scenario of slow economic recovery combined with the worsening of the political crisis, the audiovisual overview in 2017 repeated the contradiction and it even strengthened the dynamics verified the previous year. Investments in the areas of creation, production, distribution, and marketing have led to a rapid and growing presence of fictional products and formats in different channels, whether in open or pay television, digital channels, streaming and mobile devices.

It would be possible to call this a scenario of multichannel transition, which is characterized by the coexistence of television fiction (its genres and formats) in broadcasting/post-broadcasting channels and in network/post-network channels. We exemplify with the production of a series that premieres on Globo Play with a start allocation in out-of-network (or post-network) channel with all the episodes of the first season, which allows watching it in a marathon or at the time the user wants to. After a while, we check its reallocation in a narrowcasting network – Mais Globosat – a paid channel, already with a time slot and some advertising breaks. Soon after, the same series has

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<sup>1</sup> Obitel Brazil team thanks Kantar Ibope Media, whose information, kindly provided, made it possible to carry out the analyses presented here.

other open channel relocation (broadcasting) – Globo –, with weekly frequency and extended commercial intervals. We observe this new production logic (Martín-Barbero, 2001), to be implemented in the country, based on the dynamics of the audiovisual context in 2017.

### 1.1. Open TV in Brazil

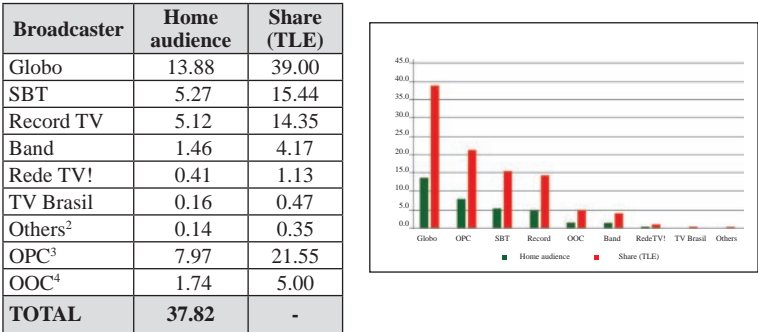
The Brazilian television system started being composed of seven national networks, with the entry, in 2017, of a public station, TV Cultura. Thus, there are five private and two public broadcasters. Only RedeTV! did not produce national premiere fiction in the year.

**Chart 1. Open national television broadcasters in Brazil**

Private broadcasters (5)	Public broadcasters (2)
Globo Record TV SBT Band RedeTV!	TV Brasil TV Cultura
Total broadcasters = 7	

Source: Obitel Brazil

**Graph 1. Audience and TV *share* by broadcaster in 2017**



Fonte: Kantar Ibope Media – Media Workstation – 15 Markets

<sup>2</sup> Other: data from Record News, TV Câmara, TV Justiça, TV Senado and channels not identified or registered by Kantar Ibope Media.

<sup>3</sup> OPC: Other Paid Channels: pay TV broadcasters that do not have individually published audience.

<sup>4</sup> OOC: Other Open Channels: open TV broadcasters that do not have individually published audience.

The national audience for open TV grew compared to 2016, from 37.41 to 37.82. Globo is still leading, with an increase of 0.54 points (from 13.34 to 13.88), and SBT and Record keep the fight for second place, which is SBT's position since 2015, despite a decrease of 0.21 points (from 5.48 to 5.27) and Record's increase of 0.07 points (from 5.05 to 5.12). Band, in the third position, had a decrease from 1.52 to 1.46 points. There was a decrease in the audience of RedeTV! (from 0.47 to 0.41) and TV Brasil (from 0.17 to 0.16).

Meanwhile, the growth in pay TV (OPC), registered since 2013 by Obitel, was interrupted. Even with a loss of 2.32% in audience, OPC maintains the second position (it decreased from 8.16 points in 2016 to 7.97 in 2017). It is not possible to compare the index to that of the open channels since it reflects the sum of the audiences of the pay TV broadcasters.

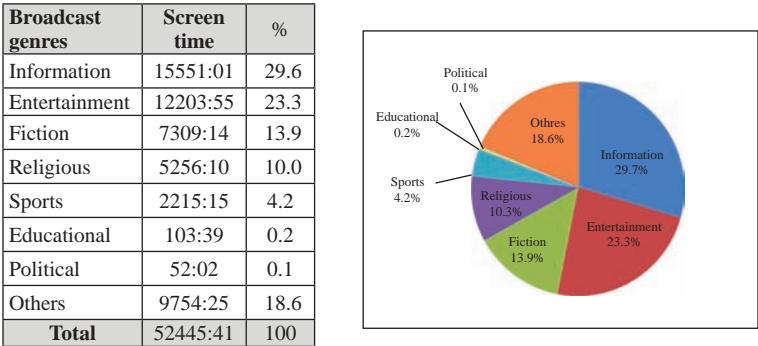
When analyzing the domestic share of televisions connected in television channels (TLE), the so-called "pure audience" of TV, we observed an increase of 2.8% in Globo's share in TLE of 2016 (from 37.93% to 39%), as well as a decrease in the share of OPC, from 23.23% to 21.55%. As for the other broadcasters, the share on TLE remained stable (fluctuations below one percentage point).

The penetration of the audience in the year decreased in all means<sup>5</sup>, except for the internet. The ranking had only one change (in the last positions), and open TV remained the leader, with 89%, followed by the expansive media, which includes media such as outdoor, with 78.9%. In third place, we have the internet, which, with an increase of 3.3 percentage points, reached a 76.1% penetration. Next, in order, radio, pay TV, cinema and magazines, which started occupying the last position.

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<sup>5</sup> Decrease in the media penetration index from 2016 to 2017: open TV, 92.3% to 89%; extensive media, 83.1% to 78.9%; radio, 67.9% to 62.9%; pay TV, 47% to 39%; newspapers, 31.7% to 17.2%; cinema, 15.5% to 15.2%, magazines, 24.7% to 17.8%. Internet was the only means with an increase, going from 72.8% to 76.1%. Source: Kantar Ibope Media.

**Graph 2. Genres and hours broadcast on TV**



Fonte: Kantar Ibope Media – Media Workstation – 15 Markets

The television genre chart shows the leadership of the three genres in the same order – information, entertainment and fiction, which together account for 67% of the programming hours of open TV (in 2016, they were 60%). While information and entertainment grew more than 3 points each, fiction remained stable. The other genres had small oscillations from one point up (religious) or down (sport).

### 1.2. Audience trends over the year

Telenovelas were the highlight of the audience in 2017. Two productions of 9 PM set records. *Força do Querer* (Globo, 2017), with the highest audience since *Avenida Brasil* (Globo, 2012), averaged 35.5 points and 50 points in the last chapter (a reach of 34,410 million people<sup>6</sup>). Its successor, *O Outro Lado do Paraíso*, until December 31st, 2017 scored an average of 32.5 points, with peaks of 41 points.

In the 7 PM range, *Pega Pega* (Globo, 2017) had the highest audience of the time since *Cheias de Charme* (Globo, 2012). Following the increasing trend, two plots from Globo’s 6 PM, *Sol Nascente* and *Novo Mundo*, scored 25 points on average.

<sup>6</sup> Cf. <http://www.imcgrupo.com/fsb/e52619e6ce6fbf3d4af399155d35352f.pdf>. Accessed in: Mar. 2018.

The Brazilian time in front of the TV has been growing since 2014. The daily average went from 5h57min in 2016 to 6h04min in 2017, an increase observed mainly between the ages of 18 and 24 years (an increase of 6.7%). On the positive side, as regards the “right to communicate” (Hamelink, 1995), the index of access to television by different screens is increasing. This index is 70% in the urban area and 56% in the rural area (in 2010, it was 57% in the urban area and 33% in the rural area).<sup>7</sup>

### 1.3. Advertising investments: in TV and in fiction

Advertising investment in television in 2017 grew again, after a slight decrease in 2016. The market invested R\$ 134 billion in ads<sup>8</sup>, an increase of 3%. Open TV received 54% of the value (R\$ 71.9 billion) and it remained a leader in the concentration of resources. Next, we have, in order, pay TV (13%), newspapers (12%), TV merchandising (6%), radios (5%) and magazines (4%). We have noticed a significant increase in investments in out-of-home (OOH) media and digital formats. The first one (advertisements in commercial buildings, street clocks, subways, etc.) grew 38% compared to 2016, which represented R\$ 3.9 billion in investments; and digital formats had an increase of 9% (total of R\$ 6.2 billion). These include advertisements on internet websites (display) and search engines such as Google (search). The increase was mainly in sponsored ads (91%). The digital formats totaled R\$ 6.2 billion (5% of investments), equating to radio in fifth place in the ranking. In the open TV, the main advertisers were, in order: commerce; personal hygiene, and beauty; pharmaceutical; financial and security; public and social administration.

### 1.4. Merchandising and social merchandising

In 2017, the more frequent actions of product placement happened in the 9 PM telenovela, *A Força do Querer*, the most expen-

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<sup>7</sup> Cf. <http://cetic.br/pesquisa/domicilios/>. Acesso em: mar. 2018.

<sup>8</sup> Source: Kantar Ibope Media.



sive programming time. An example is the scene in which a character discovers that his driver is a cross-dresser in a lingerie show. In the same telenovela, there was merchandising crossover, unprecedented until then<sup>9</sup>: two characters shopped at the hotel shop of the 7 PM plot, *Pega Pega*.

About social merchandising, *A Força do Querer* was one of the most relevant telenovelas of the year. The theme of transgender people has mobilized public opinion in media and social networks. Treated with sensitivity, it followed the transformation of the protagonist Ivana into Ivan. Its relevance lies in having addressed the issue within gender policies, illuminating its complexity.

Other fictions of Globo focused on socio-educational actions, such as the insertion of informative cards at the end of chapters/episodes, with phones to report and assistance. This was done in series *Sob Pressão* (sexual abuse and domestic violence); superseries *Os Dias Eram Assim* (HIV/aids); and in telenovela *O Outro Lado do Paraíso* (domestic violence and pedophilia).

### 1.5. Communication policies

Started in 2016, the analog TV signal shutdown has already occurred in most of the country. With the shutdown in Greater São Paulo in March 2017, three broadcasters (SBT, Record, and Rede TV) formed a joint venture and negotiated new rules with the pay TV operators, for which they would charge for digital transmission (previously free). The switch off<sup>10</sup>, which in some operators lasted up to five months, has caused these channels to lose their audience. The termination of the analog shutdown is scheduled to the end of 2018.

### 1.6. ICT trends

As we pointed out in recent years, internet access has increased in Brazilian households, with an index of around 64%. Mobile de-

<sup>9</sup> Cf. <http://nilsonxavier.blogosfera.uol.com.br/2017/09/15/acao-de-merchan-inedita-personagem-da-novela-das-9-compra-na-novela-das-7>. Accessed in: Mar. 2018.

<sup>10</sup> Analog TV signal shutdown.

vices are the main source of access – mobile phones are present in 94.8% of households. The watching of videos on demand continues to expand and it affirms the trend of “digital first”, i.e., the distribution of content in the digital environment before TV.<sup>11</sup>

### 1.7. Public TV

In 2016, public channel TV Cultura became a national network. TV Brasil, in turn, operated in 2017 in the midst of cuts, lack of salary readjustment and strike of employees of Empresa Brasil de Comunicações, to which it is subordinated.<sup>12</sup>

The two public TV stations tied with Record among the ones that most exhibited national premiere titles in 2017 (six each) and they aired series made in unusual regions of the television scene, such as the Federal District, Bahia and Paraná, resulting from Programa Brasil de Todas as Telas<sup>13</sup>, outcome of regional notices of the first government of Dilma Rousseff that aimed at extending public television production.

At TV Cultura, the highlights were series *Máximo & Confúcio*, a spin-off of *Papai Sabe Nada* (Record, 1962-1966) – a precursor of the family sitcoms on Brazilian TV –, and the two seasons of the hybrid program *Terradois*, a mix of dramatizations and comments. TV Brasil still had an increase in the importation of titles from Portuguese-speaking countries. It broadcast a Portuguese docudrama and telefilm (see Table 1 in topic 2); a Mozambican TV movie (*O Dia em que Explodiu Mabata Bata*) and an Angolan one (*O Calvário de Joceline*)<sup>14</sup>; and, in its prime time, Angolan telenovela *Jikulumessu – Abre o Olho*.

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<sup>11</sup> See topic 5 of this chapter.

<sup>12</sup> Cf. <http://observatoriodatelevisao.bol.uol.com.br/noticia-da-tv/2017/12/sem-reajuste-trabalhadores-da-tv-brasilebc-encerram-greve-apos-quase-duas-semanas>. Accessed in: Feb. 2018.

<sup>13</sup> Line of the Audiovisual Sectorial Fund (FSA), launched with the objective of consolidating public policies for audiovisual of the Guidelines and Goals Plan, created in 2012 by the National Agency of Cinema (Ancine).

<sup>14</sup> Produced by the CPLP Audiovisual Program, created to promote the production and broadcasting of audiovisual content in the States that are members of the Community of Portuguese-Speaking Countries.

## 1.8. Pay TV

After the *golden years* of pay TV in Brazil (2014-2015), we see a sequence of subscriber decreases – currently, 18.64 million.<sup>15</sup> The decrease was almost 5%, and in 2016 it had already been 2% compared to 2015.<sup>16</sup> Several factors are associated with the process. The first: the country's economic crisis may have led to the loss of class C access to this kind of services – and Brazilian pay TV is one of the most expensive in the world. The second: increasing competition of digital services (OTT) such as Netflix.

The decrease in pay TV penetration was not reflected in the audience since the subscriber spent more time on content: it was 3h19min a day in the first five months of 2017 versus 3h16min a day in 2016. Brazil is the eighth pay TV market in the world – paid channels are watched daily by 56.4 million people in the country.<sup>17</sup>

### *Fiction on pay TV*

Pay TV has been surpassing the minimum national content broadcasting quota.<sup>18</sup> Fifteen channels broadcast Brazilian television fiction in 2017, six of them are national ones and nine international ones. In total there were 30 premiere national fictions, mainly comedy, like *Suburbanos* (Multishow), with the fourth season confirmed, and dramatic comedy *171 Negócio de Família* (Universal). In the drama genre, HBO debuted *A Vida Secreta dos Casais* and the third season of *Magnífica 70* and *Psi*; and Fox broadcast the second season of *Me Chama de Bruna*.

There was also the second season of the most watched national series of 2016, *Um Contra Todos* (Fox), presenting political and cor-

<sup>15</sup> In 2016, they were 18.80 million, and in 2015, 19.11 million subscribers. Source: <http://oca.ancine.gov.br/televisao>. Accessed in: Feb. 2018.

<sup>16</sup> Cf. <http://nextvnews.com/base-de-tv-paga-registra-queda-de-5-em-2017/>. Accessed in: Feb. 2018.

<sup>17</sup> Cf. <http://www.meioemensagem.com.br/home/midia/2017/06/06/brasileiro-dedica-mais-de-3-horas-diarias-a-tv-paga.html>. Acesso em: fev. 2018.

<sup>18</sup> Cf. <http://www.ancine.gov.br/pt-br/sala-imprensa/noticias/veicula-o-de-obras-brasileiras-em-canais-de-tv-paga-supera-os-m-nimos>. Accessed in: Feb. 2018.

ruption issues. *Era uma Vez uma História*, recorded in Portugal and Brazil, was simultaneously broadcast on open TV (Band) and pay TV (Warner). The transmedia action of *Missão AXN* (AXN) stood out, in its second edition in 2017, which selected fans to form a side team and help to unravel a fictional murder. *Missão AXN* can be described as a branding action that was transformed into channel content production.

### 1.9. Independent production companies

Independent productions have been progressively increasing their performance along the open channels, and this year we had nine co-productions.

Globo co-produced three miniseries: *Cidade dos Homens* (with production company O2 Filmes), *Aldo – Mais Forte que o Mundo* (with Black Maria, Globo Filmes and Universal Pictures) and *Malasartes* (with O2 Filmes, Globo Filmes and Universal Pictures) – these last two were films turned into short fictions for TV.

Production company Casablanca and Record made five fictions in 2017: telenovelas *A Terra Prometida*, *Escrava Mãe*, *O Rico e Lázaro*, *Belaventura* and *Apocalypse* – the last one is a biblical plot set in the present day. And with production companies Chatrone and Panorâmica, it co-produced series *Sem Volta*.

Band, in its turn, broadcast docudrama *Era uma Vez uma História*, co-produced by Cine Group and Eyeworks. Merging information and dramaturgy, in four episodes it dealt with the history of Brazil, since the coming of the Portuguese Court until the Proclamation of the Republic.

### 1.10. International trends

Following an international trend, Globo adopted the nomenclature “superseries” for its 11 PM fictions. Told in chapters, such as telenovelas, the term seems to want to create a niche audience, with more adult themes and scenes with violence and sexuality. A “serialization of the telenovela” is experimented, in which the resulting format is hybrid, between the telenovela and the series.

The superseries is born linked to a double strategy: on the one hand, taking into account the international market, which prefers shorter stories (between 50 and 70 chapters) than the telenovela; on the other, it is a cultural strategy, since this is a serial narrative to particularly engage the male audience, with controversial and violent themes. It was a term coined in Mexico and the Hispanic US that was extended to other Latin countries. Globo has been working with the format since 2011, but by 2016 it was called “short telenovela” or “11 PM telenovela”.

## 2. Analysis of the year: national and Ibero-American premiere fiction

**Table 1. Fiction broadcast in 2017**  
(national and imported; premieres and reruns; co-productions)<sup>19</sup>

PREMIERE NATIONAL TITLES – 43	CO-PRODUCTION TITLES – 0
<b>Globo – 23 national titles</b> 1. <i>A Cara do Pai</i> (series) – 1st season 2. <i>A Cara do Pai</i> (series) – 2nd season 3. <i>A Força do Querer</i> (telenovela) 4. <i>A Fórmula</i> (series) 5. <i>A Lei do Amor</i> (telenovela) 6. <i>Aldo – Mais Forte que o Mundo</i> (mini-series) 7. <i>Cidade dos Homens</i> (miniseries) 8. <i>Cidade Proibida</i> (series) 9. <i>Dois Irmãos</i> (miniseries) 10. <i>Filhos da Pátria</i> (series) 11. <i>Malasartes</i> (miniseries) 12. <i>Malhação – Pro Dia Nascer Feliz</i> (soap opera) – 24th season 13. <i>Malhação – Viva a Diferença</i> (soap opera) – 25th season. 14. <i>Mister Brau</i> (serie) – 3rd season 15. <i>Novo Mundo</i> (telenovela) 16. <i>O Outro Lado do Paraíso</i> (telenovela) 17. <i>Os Dias Eram Assim</i> (telenovela) <sup>19</sup> 18. <i>Pega</i> (telenovela) 19. <i>Rock Story</i> (telenovela)	<b>PREMIERE IMPORTED TITLES – 10</b>  <b>SBT – 7 imported titles</b> 1. <i>A Gata</i> (telenovela – Mexico) 2. <i>Lágrimas de Amor</i> (telenovela – Mexico) 3. <i>O que a Vida me Roubou</i> (telenovela – Mexico) 4. <i>Querida Inimiga</i> (telenovela – Mexico) 5. <i>Sou Luna</i> (telenovela – Argentina) – 1st season 6. <i>Sou Luna</i> (telenovela – Argentina) – 2nd season 7. <i>Um Caminho para o Destino</i> (telenovela – Mexico)  <b>TV Brasil – 3 imported titles</b> 8. <i>A Casa</i> (docudrama – Portugal) 9. <i>O Dia em que as Cartas Pararam</i> (telefilm – Portugal) 10. <i>O Tempo Entre Costuras</i> (series – Spain)

<sup>19</sup> According to Obitel’s methodological protocol – which does not register the superseries format – and the observation and analysis of the narrative of *Os Dias Eram Assim*, we registered this fiction as a telenovela.

20. <i>Sob Pressão</i> (series) 21. <i>Sol Nascente</i> (telenovela) 22. <i>Tempo de Amar</i> (telenovela) 23. <i>Vade Retro</i> (series)  <b>Record TV – 6 national titles</b> 24. <i>A Terra Prometida</i> (telenovela) 25. <i>Apocalipse</i> (telenovela) 26. <i>Belaventura</i> (telenovela) 27. <i>Escrava Mãe</i> (telenovela) 28. <i>O Rico e Lázaro</i> (telenovela) 29. <i>Sem Volta</i> (series)  <b>TV Brasil – 6 national titles</b> 30. <i>A Felicidade de Margô</i> (telefilm) 31. <i>A Grande Viagem</i> (series) 32. <i>Entre o Céu e a Terra</i> (series) – 2nd season. 33. <i>Ernesto, o Exterminador de Seres Monstruosos (e Outras Porcarias)</i> (series) 34. <i>Nóis por Nóis</i> (series) 35. <i>Quero Ter um Milhão de Amigos</i> (series)  <b>TV Cultura – 6 national titles</b> 36. <i>A Música da Minha Vida</i> (series) 37. <i>Cidade Invisível</i> (series) 38. <i>Máximo &amp; Confúcio</i> (series) 39. <i>Rarefeito</i> (series) 40. <i>Terradois</i> (others) – 1st season 41. <i>Terradois</i> (others) – 2nd season  <b>SBT – 1 national title</b> 42. <i>Carinha de Anjo</i> (telenovela)  <b>Band – 1 national title</b> 43. <i>Era uma Vez uma História</i> (docudrama)	<b>RERUN TITLES – 24</b>  <b>Record TV – 7 reruns</b> 1. <i>A Escrava Isaura</i> (telenovela) 2. <i>Amor e Intrigas</i> (telenovela) 3. <i>Bicho do Mato</i> (telenovela) 4. <i>Milagres de Jesus</i> (miniseries) 5. <i>Os Dez Mandamentos</i> (telenovela) 6. <i>Ribeirão do Tempo</i> (telenovela) 7. <i>Vidas em Jogo</i> (telenovela)  <b>TV Brasil – 7 reruns</b> 8. <i>A Saga – Da Terra Vermelha Brotou o Sangue</i> (series) 9. <i>Cidade Invisível</i> (series) 10. <i>Descalço Sobre a Terra Vermelha</i> (miniseries – Brazil/Spain) 11. <i>Natália</i> (series) – 1st season 12. <i>O Tempo Entre Costuras</i> (series – Spain) 13. <i>Rarefeito</i> (series) 14. <i>República do Peru</i> (series)  <b>Globo – 5 reruns</b> 15. <i>A Grande Família</i> (series) 16. <i>Celebridade</i> (telenovela) 17. <i>Cheias de Charme</i> (telenovela) 18. <i>Gonzaga – De Pai pra Filho</i> (miniseries) 19. <i>Senhora do Destino</i> (telenovela)  <b>SBT – 5 reruns</b> 20. <i>A Usurpadora</i> (telenovela – Mexico) 21. <i>Chiquititas</i> (telenovela) 22. <i>No Limite da Paixão</i> (telenovela – Mexico) 23. <i>Rubi</i> (telenovela – Mexico) 24. <i>Sortilégio</i> (telenovela – Mexico)  <b>TOTAL OF PREMIERE TITLES: 53</b> <b>TOTAL OF RERUN TITLES: 24</b> <b>GENERAL TOTAL OF BROADCAST TITLES: 77</b>
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Source: Obitel Brazil

In 2017, Brazil recorded a 39% increase in the number of premiere national titles compared to 2016: 43 fictions compared to 31 of the previous year. This increase was due to the titles showed on public TV stations: the sum of fictions shown by private networks in

2017 is equivalent to the national total registered in 2016, when TV Brasil, the only public broadcaster then, aired only one title.

We also observed a record in the number of imported fictions (see Table 2) and reruns. It seems logical that, in a year marked by the economic crisis, broadcasters have resorted to their archives to maintain the programming grid. As in 2016, Globo, besides the reruns of telenovelas in the evening *Vale a Pena Ver de Novo*, broadcast other productions again during the night period; Record and SBT consolidated the rerun of telenovelas in their afternoons, while TV Brasil resorted to excessive reruns of series and miniseries.

**Table 2. Premiere fiction in 2017: countries of origin**

Country	Titles	%	Chapters/ episodes	%	Time	%
<b>NATIONAL (total)</b>	<b>43</b>	<b>81.1</b>	<b>2117</b>	<b>83.1</b>	<b>1430:50</b>	<b>79.1</b>
<b>OBITEL COUNTRIES (total)</b>	<b>10</b>	<b>18.9</b>	<b>430</b>	<b>16.9</b>	<b>377:05</b>	<b>20.9</b>
Argentina	2	3.8	80	3.1	32:00	1.8
<b>Brazil</b>	<b>43</b>	<b>81.1</b>	<b>2117</b>	<b>83.1</b>	<b>1430:50</b>	<b>0.0</b>
Chile	0	0.0	0	0.0	0	0.0
Colombia	0	0.0	0	0.0	0	0.0
Ecuador	0	0.0	0	0.0	0	0.0
Spain	1	1.9	10	0.4	08:00	0.4
USA (Hispanic production)	0	0.0	0	0.0	0	0.0
Mexico	5	9.4	338	13.3	335:30	18.6
Peru	0	0.0	0	0.0	0	0.0
Portugal	2	3.8	2	0.1	01:35	0.1
Uruguay	0	0.0	0	0.0	0	0.0
Venezuela	0	0.0	0	0.0	0	0.0
<b>CO-PRODUCTIONS (total)</b>	<b>0</b>	<b>0.0</b>	<b>0</b>	<b>0.0</b>	<b>0</b>	<b>0.0</b>
Brazilian co-productions	<b>0</b>	<b>0.0</b>	<b>0</b>	<b>0.0</b>	<b>0</b>	<b>0.0</b>
Co-productions between Obitel countries	<b>0</b>	<b>0.0</b>	<b>0</b>	<b>0.0</b>	<b>0</b>	<b>0.0</b>
<b>GENERAL TOTAL</b>	<b>53</b>	<b>100.0</b>	<b>2547</b>	<b>100.0</b>	<b>1807:55</b>	<b>100.0</b>

Source: Obitel Brazil

Despite the increase in national titles, the number of chapters/episodes recorded an increase of only 3% compared to 2016. On the other hand, the number of hours presented a slight decrease of 0.3%, reflecting the proliferation of short seriality fictions and less time in the duration of each chapter/episode.

In the year, Brazil has observed a diversification in the origin of the Ibero-American fictions not seen since 2011: four countries of the Obitel scope aired. The number of chapters/episodes of imported fictions, however, registered a decrease of 40% compared to 2016, which is reflected in the hours – a retraction of 38%. This was due to two factors: SBT, the broadcaster that most imports titles, reduced the schedules aimed at Mexican telenovelas in its afternoons from three to two, dedicating one of them to reruns; TV Brasil has favored short seriality formats.

Recent years have revealed changes in the habits of viewers, who are increasingly watching the night range – dawns have shown a higher average audience than in the morning.<sup>20</sup> These transformations were reflected in the programming strategies of broadcasters: in 2011, Globo, which guides its time slot and the palimpsest of its prime time (Lopes, 2009) in the watching habit, started to call its traditional 8 PM telenovela of 9 PM telenovela, in addition to starting one telenovela at 11 PM a year; the investments of Record and SBT in talk shows and news media after midnight are also indications of the audience increase in this range.

Facing this scenario, we consider it appropriate, as of this year, to adjust the prime time period, marking it from 7:30 PM to 11 PM. This meant a new record in the number of chapters/episodes and hours in prime time – an increase of 4% and 2% respectively compared to 2016. The change also implied a decrease of chapters/episodes (16%) and hours (33%) in the night range.

If in 2016 Ibero-American fictions, although they remain concentrated in the afternoon, also appeared in prime time, this year they appear in all the time slots. During the night period, two Portuguese fictions were shown on TV Brasil. And in the morning, two seasons of *Sou Luna* were broadcast by SBT.

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<sup>20</sup> Cf. <http://tvefamosos.uol.com.br/colunas/flavio-ricco/2018/02/23/publico-que-assiste-tv-na-madrugada-e-maior-que-o-das-manhas.htm>. Accessed in: Mar. 2018.



Table 3. Chapters/episodes and hours broadcast by time slot

Time slot	National			Ibero-American			Total		
	C/E	%	H	C/E	%	H	C/E	%	H
Morning (6:00 AM-12 PM)	0	0.0	0	80	18.6	117:25	80	3.1	117:25
Afternoon (12:00 PM-7:30 PM)	615	29.1	327:30	330	76.7	248:05	945	37.1	575:35
Prime time (7:30 PM-11:00 PM)	1333	63.0	1024:55	18	4.2	10:00	1351	53.0	1034:55
Night (11:00 PM-06:00 AM)	169	8.0	78:25	2	0.5	01:35	171	6.7	80:00
Total	2117	100.0	1430:50	430	100.0	377:05	2547	100.0	1807:55

Source: Obitel Brazil

Table 4. Formats of national and Ibero-American fiction

Format	National			Ibero-American		
	Titles	%	C/E	H	%	Titles
Telenovela	15	34.9	1627	76.9	83.4	7
Series	18	41.9	192	9.1	102:50	1
Miniseries	4	9.3	20	0.9	12:55	0
Telefilm	1	2.3	1	0.0	00:50	1
Unitary	0	0.0	0	0.0	0	0
Docudrama	1	2.3	3	0.1	02:25	1
Others (soap opera, etc.)	4	9.3	274	12.9	118:50	0
Total	43	100.0	2117	100.0	1430:50	10

Source: Obitel Brazil

For the first time, the specific series format has surpassed the number of telenovelas. At a first glance, we can relate this fact to the hypothesis about the “short stories” phenomenon as a narrative expression of the present (Lopes and Mungioli, 2015): summed, short seriality titles account for 56% of the fictions broadcast, a lower number only compared to 2015 (67%). However, as in that year – in which telefims commemorating the 50 years of Globo were broadcast –, also in 2017 there was an atypical factor: the titles broadcast on public TV stations from government policies encouraging the audiovisual.

**Table 5. Formats of national fiction by time slot**

Format	Morn- ing	%	Af- ter- noon	%	Prime time	%	Night	%	To- tal	%
<b>Telenovela</b>	0	0.0	3	33.3	11	47.8	1	9.1	15	34.9
<b>Series</b>	0	0.0	4	44.4	7	30.4	7	63.6	18	41.9
<b>Miniseries</b>	0	0.0	0	0.0	3	13.0	1	9.1	4	9.3
<b>Telefilm</b>	0	0.0	0	0.0	0	0.0	1	9.1	1	2.3
<b>Unitary</b>	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
<b>Docudrama</b>	0	0.0	0	0.0	0	0.0	1	9.1	1	2.3
<b>Others (soap opera, etc.)</b>	0	0.0	2	22.2	2	8.7	0	0.0	4	9.3
<b>Total</b>	<b>0</b>	<b>0.0</b>	<b>9</b>	<b>100.0</b>	<b>23</b>	<b>100.0</b>	<b>11</b>	<b>100.0</b>	<b>43</b>	<b>100.0</b>

Source: Obitel Brazil

The adjustment in prime time made the slot return to concentrating the largest number of national titles. On the other hand, the number of telenovelas recorded the lowest percentage in prime time since the beginning of Obitel monitoring, in 2006, while the series reached a record – summed, short seriality formats represent 43.4% of the prime time total. The series also started dominating the afternoon slot, traditionally occupied only by 6 PM telenovelas and by soap opera *Malhação*, all Globo’s fictions. The night period, despite having registered a decrease in the number of titles, is still the one that presents greater diversification of formats.

**Table 6. Time period of national fiction**

Time	Titles	%
<b>Present</b>	30	69.8
<b>Period</b>	7	16.3
<b>Historical</b>	5	11.6
<b>Others</b>	1	2.3
<b>Total</b>	<b>43</b>	<b>100.0</b>

Source: Obitel Brazil

Although the primacy of present-day fictions remains the same, the sum of the percentages of titles set in the past (period and historical – 27.9%) is the highest since the Obitel monitoring implemented this table, in 2010. This panorama allows us to infer that Brazilian television fiction seems to be increasingly appropriating the concept of “return to the past”, used by Buonanno (2012) in her analysis of television fiction and cultural debate around the media in the early 21st century. Proof of this is the broadcast of Globo’s historical telenovela, *Novo Mundo*, at 6 PM, a time slot traditionally dedicated to period plots. In the midst of the troubled Brazilian socio-political scenario, the past, in the case of *Novo Mundo*, interested not only as an allegory but as a reflection on the historical process of the country, bringing the people to the centrality of remarkable events such as the Proclamation of the Independence.<sup>21</sup>

Among the historical titles, there are *Os Dias Eram Assim* (Globo) – set in the military dictatorship –, *Era uma Vez uma História* (Band) and two Record’s biblical telenovelas, *A Terra Prometida* and *O Rico e Lázaro*. The period titles are: *Tempo de Amar*, *Dois Irmãos*, *Cidade Proibida* and *Filhos da Pátria*, all Globo’s; and *Escrava Mãe* and *Belaventura* – a medieval telenovela, an unusual genre in Brazilian fiction –, both Record’s. The category “other” presents series *A Grande Viagem* (TV Brasil), whose narrative contemplated time travels.

<sup>21</sup> Cf. <http://mauriciostycer.blogosfera.uol.com.br/2017/09/09/historiadora-ve-renovacao-de-cliches-na-cena-da-independencia-de-novo-mundo/>. Accessed in: Mar. 2018.

**Table 7. The ten most watched titles: origin, rating, share**

	Title	Country of original idea or script	Channel	Format/genre	N. of chap./ep. (in 2017)	Time slot	Rating	Share
1	<i>A Força do Querer</i>	Brazil	Globo	Telenovela/drama	172	Prime time	35.4	51.91
2	<i>O Outro Lado do Paraíso</i>	Brazil	Globo	Telenovela/drama	59	Prime time	32.4	48.78
3	<i>A Lei do Amor</i>	Brazil	Globo	Telenovela/drama	77	Prime time	30.3	45.00
4	<i>Pega Pega</i>	Brazil	Globo	Telenovela/romantic comedy	177	Prime time	28.3	44.15
5	<i>Malasartes</i>	Brazil	Globo	Miniseries/comedy	3	Prime time	27.7	45.91
6	<i>Rock Story</i>	Brazil	Globo	Telenovela/romance	133	Prime time	27.5	42.82
7	<i>Sob Pressão</i>	Brazil	Globo	Series/drama	9	Prime time	26.3	45.23
8	<i>Sol Nascente</i>	Brazil	Globo	Telenovela/romance	68	Afternoon	25.3	43.99
9	<i>Novo Mundo</i>	Brazil	Globo	Telenovela/historical romance	160	Afternoon	25.2	41.15
10	<i>Aldo – Mais Forte que o Mundo</i>	Brazil	Globo	Miniseries/biographical drama	4	Prime time	25.1	40.85
<b>Total productions: 10</b>					<b>Foreign scripts: 0</b>			
100%					0%			

Source: Kantar Ibope Media – Media Workstation – Metropolitan Regions TR Premium | Obitel Brazil

Globo's 9 PM telenovelas returned to conquer the first positions of the top ten list. In addition, the last time all the top three places in the table recorded indexes above 30 points was in 2014. The share of the most watched title, however, decreases yearly since 2013. This scenario proves the indisputable centrality of television, but it also highlights the increase of new options to watch.

*Sob Pressão* represents the return to top ten of the series broadcast shortly after the 9 PM telenovela, because since 2014, the year of the last season of *A Grande Família* and the penultimate of *Tapas & Beijos*, the series of this time slot are not included in the ranking.

The series also registers the preference of the class AB and it figures as the second most watched title between viewers aged 18 to 49 years (see Table 8).

**Table 8. Audience profile of the ten most watched titles:  
gender, age, socioeconomic status**

Title		Channel	Gender %		Socioeconomic status %		
			Female	Male	AB	C	DE
1	<i>A Força do Querer</i>	Globo	62.1	37.9	28.5	52.6	18.9
2	<i>O Outro Lado do Paraíso</i>	Globo	62.6	37.4	28.4	51.8	19.8
3	<i>A Lei do Amor</i>	Globo	62.1	37.9	28.7	51.8	19.5
4	<i>Pega Pega</i>	Globo	64.0	36.0	26.8	52.5	20.7
5	<i>Malasartes</i>	Globo	60.0	40.0	26.3	53.1	20.5
6	<i>Rock Story</i>	Globo	63.9	36.1	26.8	53.3	20.0
7	<i>Sob Pressão</i>	Globo	62.3	37.7	29.3	52.6	18.1
8	<i>Sol Nascente</i>	Globo	65.5	34.5	26.8	52.5	20.8
9	<i>Novo Mundo</i>	Globo	64.9	35.1	26.4	53.3	20.3
10	<i>Aldo – Mais Forte que o Mundo</i>	Globo	59.0	41.0	28.3	52.6	19.1

Title		Channel	Age group %					
			4-11	12-17	18-24	25-34	35-49	50+
1	<i>A Força do Querer</i>	Globo	5.7	6.5	7.8	14.6	24.7	40.7
2	<i>O Outro Lado do Paraíso</i>	Globo	5.4	5.8	7.5	13.8	24.9	42.6
3	<i>A Lei do Amor</i>	Globo	5.3	6.4	7.9	14.2	24.0	42.3
4	<i>Pega Pega</i>	Globo	6.2	6.5	7.6	13.1	24.1	42.5
5	<i>Malasartes</i>	Globo	6.4	7.1	8.1	16.0	26.4	36.0
6	<i>Rock Story</i>	Globo	6.5	7.6	8.4	14.3	23.9	39.3
7	<i>Sob Pressão</i>	Globo	6.3	7.1	9.3	16.6	25.9	34.9
8	<i>Sol Nascente</i>	Globo	6.4	7.9	8.7	13.9	23.2	39.9
9	<i>Novo Mundo</i>	Globo	6.3	7.0	8.2	13.2	23.4	41.9
10	<i>Aldo – Mais Forte que o Mundo</i>	Globo	6.2	7.9	9.4	17.2	26.4	32.9

Source: Kantar Ibope Media – Media Workstation – Metropolitan Regions TR Premium | Obitel Brazil

We observe the preference of the female audience for the romances exhibited at 6 PM, while the male audience registers expressive percentages in the adapted fictions of movies shown in the cinema, mainly in drama *Aldo – Mais Forte que o Mundo*, based on the life of an MMA fighter. DE class again reaches its apex in the genres of romance and comedy. The audience over 50 years old, in

turn, is more representative in telenovelas that privileged the melodrama matrices, such as *O Outro Lado do Paraíso*, *A Lei do Amor* and *Pega Pega*.

### 3. Transmedia reception

The actions of broadcasters to accompany their audiences on multi-platforms in 2017 were of different orders. The main concern of open TV is to observe the business model of SVoD companies (such as Netflix), especially the offer of products for continuous and immersive watching, without intervals (binge watching).<sup>22</sup> The production of webseries as *A Beleza de Cada História*<sup>23</sup> and *Põe na Conta* (both 2017), available on Gshow platform and Globo Play, continues to be one of the strategies adopted.<sup>24</sup>

Among the transmedia actions of 2017 is “Assista a Esse Livro”, a partnership between Globo, Amazon and Companhia das Letras to offer an innovative experience.<sup>25</sup> The proposal allows interaction with the e-book because in certain excerpts of classic works adapted for TV it is possible to watch corresponding scenes. Each digital book has links to videos that are up to one minute long to be seen with Kindle application. This project is an example of what authors like Ryan (2018) and Scolari (2013) point out as the use of various types of media to create experiences that cannot be achieved with just one means.

An example of a project involving TV companies and social networks was the first Twitter live transmission in partnership with Record to show the final of reality show *Dancing Brasil*. The project was developed by agency iProspect and it represents another possibility of interaction and audience participation on multiple screens.

There was also the launch of series *Dois Irmãos* at Comic Con Experience (CCXP) in São Paulo, space traditionally aimed at niche

<sup>22</sup> Cf. <http://bit.ly/2GCHc8j>. Accessed in: Mar. 2018.

<sup>23</sup> Derivative of telenovela *Pega Pega*.

<sup>24</sup> As predicted by Alex Medeiros, the multiplatform manager of the broadcaster, in 2014.

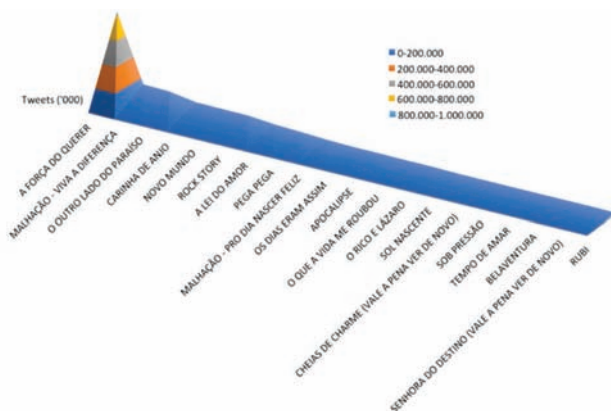
<sup>25</sup> Cf. <http://bit.ly/2GG88jr>. Accessed in: Mar. 2018.

audiences. In this case, the adaptation of the narrative passed from the book (by Milton Hatoum) to a graphic novel (by Fábio Moon and Gabriel Báe) and it finally became a miniseries. The clip featured a mix between comic animation and scenes of the series.<sup>26</sup>

### ***A Força* in the networks**

The main highlight in the networks was telenovela *A Força do Querer*. In addition to the success of the audience, the social (and controversial) character of the topics covered in the plot contributed to content spreading. The data from Kantar Ibope Media indicate that this was the most successful television fiction on Twitter in 2017, recording more than 829 million impressions through 6 million tweets, as we can see in the Graph 3.

**Graph 3. Titles with the most impact on Twitter in 2017**



Source: Kantar Ibope Media

Due to its repercussion, the last chapter of *A Força do Querer* was eight times a worldwide trending topic on Twitter, 30 times in Brazil and nine on Moments (featured content), which means, in terms of impact, a greater outreach than that achieved by *Avenida*

<sup>26</sup> Cf. <http://bit.ly/2HhNbMZ>. Accessed in: Mar. 2018.





title of the telenovela, indicates the centrality of two aspects discussed: is the presence of a trans character positive or negative? Is the issue handled appropriately? The exposure of a controversial subject on open TV is understood positively by the majority. The second issue has generated more debate, especially regarding hormonal manipulation and the choice of the actress since some you-tubers consider that the selection of a trans actor would be more appropriate. We thus notice that several factors contributed to the discussion of telenovela subjects in the networks. This time, unlike previous years monitored by *Obitel*, the first place in the audience of the top ten was also the first in terms of transmedia reception.

#### 4. Highlights of the year

##### *Deep Brazil highlighted in prime time*

Brazil's countryside has never been as present in Brazilian telenovelas as in 2017, which we perceive as a trend started by *Velho Chico* (Globo, 2016), set in the northeast of the country. Before, only *Porto dos Milagres* (Globo, 2001) was located mainly outside the big capitals. We note a phenomenon in which series, miniseries and especially telenovelas are moving out from the Rio-São Paulo area. One of the indicators is the sequence of 9 PM plots outside the traditional region.<sup>30</sup>

In 2017, this “deep Brazil” appeared in three productions (9 PM telenovelas *O Outro Lado do Paraíso* and *A Força do Querer* and miniseries *Dois Irmãos*). Belém and fictional Parazinho, in the same state of northern Brazil, were the background for *A Força do Querer*, located in the Rio-Pará area. Palmas, the capital of Tocantins, was the scenario for *O Outro Lado do Paraíso*.

If we cannot yet confirm a trend, we emphasize a higher frequency of stories with regional content. This results in a positive and

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ly/2uOiwE9; <http://bit.ly/2q8swm8>; <http://bit.ly/2GYaXQd>. Accessed in: Mar. 2018.

<sup>30</sup> *Velho Chico* was followed by *A Lei do Amor*, set in Greater São Paulo and the only one to break the chain.

necessary visibility of the *local* inside a *national* as diversified and unequal as the country is.

### **A Força do Querer: a telenovela with strong themes**

*A Força do Querer* marked the return of audience success in prime time. The last chapter reached 50 points<sup>31</sup>, the highest average since *Avenida Brasil* (Globo, 2012), whose final scored 56 points.

Ivana/Ivan's drama highlighted the complex issues of gender identities and policies. The audience followed his transition since he found himself being a trans man, surrounded by prejudices and family repulsion. Examples were the repeated scenes of Ivana/Ivan in front of the mirror, in a game of unawareness/recognition. Self-acceptance, love and sexual relations, struggle for the social name, and the unprecedented transgender pregnancy were a true socio-educational action.

The telenovela also dealt with drug trafficking in order to escape the dichotomy of favela/urban middle class in Rio. The transformation of a law student into "Bibi Perigosa", a trafficking chief wife, was a resource to enter the daily life of the favela and the logic of crime, especially under the prism of the woman, her family, and people with whom she relates.

Other themes, such as cross-dressing, beauty standards, and gambling addiction, each in its own way, are part of the contemporary public/private agenda of the Brazilian telenovela.

### **Decrease of biblical telenovelas?**

In 2017, there was a reduction of audience of the biblical telenovelas. *Os Dez Mandamentos* (Record, 2015) was the first of these productions and it had a successful audience. Since then, the biblical plots have consolidated what we call a religious niche on the country's open TV.

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<sup>31</sup> Fonte: Kantar Ibope Media – Media Workstation – 15 Markets.

One of the possible causes of the decrease was the switch off<sup>32</sup> and consequent exit of Record from the list of the main pay TV operators. In that period, it broadcast its third biblical telenovela, *O Rico e Lázaro*, replaced by *Apocalypse*, the first fiction of the genre set in the present days and the one that had lower audience.

Due to these factors, it is still difficult to say whether the decrease in the audience was a momentary consequence or if we observed a depletion of the genre. The monitoring will tell us that in the coming years.

### ***The success of Globo's 7 PM telenovelas***

Since 2015, Globo's 7 PM telenovelas have come in a flow of increasing audience and repercussion. In 2017, with *Rocky Story* and *Pega Pega*, it was no different.

Merging romantic comedy with the music scene, *Rocky Story* focused on the story of a decadent musician attempting to return to the spotlight and a girl cheated and accused of international drug trafficking. The production was based on a record label and it discussed current issues, such as the nudes leak on the internet.

Its successor was police comedy *Pega Pega*, which dealt with ethical conflicts regarding crime and punishment. Chambermaids, waiters and receptionists gained prominence, being the authors of a US\$ 40 million theft of fictional hotel Carioca Palace. One of the cores was a popular class black family, whose eldest son disappeared as a child – and soon we know he had been adopted by a rich white woman and raised in Switzerland. In spite of the fact that it still brings the subordinate black, the plot introduced a rich black man educated in Europe, allowing the breakdown of stereotypes and discussions about the black representativeness in telenovelas (Araújo, 2004; Faria and Fernandes, 2007).

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<sup>32</sup> See topic 1.5.

## **5. Theme of the year: TV fiction on video on demand platforms**

Video on demand (VoD) is defined by the Superior Council of Cinema as “a service that enhances the circulation of content and the audiovisual consumption of users of mobile technologies, TVs, and personal computers”.<sup>33</sup> Thanks to streaming, a technology that consists of the transmission and the flow of data through the use of the internet, this model does not fit in historical concepts of television or cinema because it uses broadband networks to give the user access and enjoyment, at the desired moment, to audiovisual contents to be chosen. This is a reality of non-linear network connections, with ratings not yet established, where actors and service modalities may belong to one or more segments and new arrangements.

In Brazil, the diffusion of these technologies falls within frameworks that, stable for many years, have also been reconfigured by communication policies. Historically, pay TV and open TV had a development imbricated to infrastructural issues, which was reflected in the production and distribution of television fiction. Thus, the identity of the nascent VoD in Brazil is based on Globo’s hegemony on open TV and pay TV legislation. Brazilian television fiction, for decades, reigned in the open channels and it was practically invisible on pay TV, dominated by major companies like TNT, Fox, Warner and HBO. The Pay TV Law changed this scenario by requiring the production and exhibition of Brazilian content on paid channels.

At the beginning of 2017, Ancine, the Brazilian cinema and audiovisual regulator, started the process to regulate<sup>34</sup> VoD services in the country, but there are still divergences of representatives of pay TV companies, teles, collectors and other stakeholders regarding the model and deadlines to be adopted. Meanwhile, it is possible to watch more than 40 different VoD services in the country registered by Ancine itself, including Globo TV+, YouTube, R7 Play,

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<sup>33</sup> Cf. [http://www.ancine.gov.br/sites/default/files/CSC%20-%20Consolida%C3%A7%C3%A3o%20Desafios%20VoD%2017%2012%2015\\_1.pdf](http://www.ancine.gov.br/sites/default/files/CSC%20-%20Consolida%C3%A7%C3%A3o%20Desafios%20VoD%2017%2012%2015_1.pdf). Accessed in: Mar. 2018.

<sup>34</sup> Regulation regarding catalogs of titles available, tax, information monitoring, exhibition, and quotas of national content.

Netflix, Microsoft Movies & TV, HBO Go, Net Now and Telecine On. In this list, there are VoD services enabled by open TV and pay TV channels, pay TV operators, “pure” OTTs<sup>35</sup> and technology companies.

We are facing structural changes in the audiovisual field where television fiction circulates, amidst market pressures, demands for content, new production models, and a series of distribution possibilities. Next, we present an overview of VoD in the country, seeking to identify the reconfigurations of the Brazilian television scenario based on the analysis of open TV, YouTube, pay TV and Netflix.

### ***Open TV***

The dynamism that has been characterizing the Brazilian audiovisual scenario in recent years reveals a progressive movement of the symbiosis between telecommunications, TV and computing (Fechine and Figueirôa, 2011), where open TV, central to the country’s audiovisual scenario, searches new experiences of television narrative in the digital universe and modalities of information and entertainment consumption (Mendes and Amaral, 2016).

The dialogue between open TV and new platforms of production, sharing and consumption of videos started intensifying when Globo and Record<sup>36</sup> entered YouTube, in 2014 and 2015 respectively. Still in this last year, Record started making its biblical fictions available on Netflix, and Globo launched Globo Play, its OTT application.

In 2016, Globo started exploring the principle of “digital first” (see topic 1.6) and, in 2017, full access to the first series on Globo Play, before broadcasting them on open TV (*Brasil a Bordo* and *Carcereiros*). The high productive capacity of the broadcaster allows it to dialogue with VoD more broadly than other channels. Re-

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<sup>35</sup> OTT: Over-The-Top: content, service or application available online to the end user. “Pure” OTTs are those that do not rely on pay TV services, for example: Netflix, Amazon, HBO Go.

<sup>36</sup> Discontinued in 2017 due to the development of a specific platform. Cf. <http://nextvnews.com/record-prepara-novo-servico-de-streaming/>. Accessed in: Mar. 2018.

cently, Globo announced the creation of a new OTT platform with effectively unprecedented content, i.e., series that will not necessarily be aired on open TV.<sup>37</sup>

### ***YouTube***

In Brazil, the heating of VoD market has made broadcasters such as Globo, Record and SBT produce and/or make contents available through official channels on YouTube. Channel SBT Online, for example, attentive to children and young audience, features scenes from the broadcaster's works as they air, while channels Globo and RecordTV on YouTube have promotional content for their television productions through calls or excerpts of telenovelas, series and shows.

The presence of amateur channels with TV content on YouTube is relevant and it raises comments and discussions. In this context, SBT's Mexican telenovelas are highlighted. Of the titles broadcast in 2017, we noticed that all the works were broadcast by some amateur channel.<sup>38</sup>

Talking about YouTube is considering it a space that aggregates mass media to the emergence of cultural practices based on participatory audience behavior (Castilho, 2014). Not without a cause, the platform has become a debate environment that will certainly deserve a closer look in the next few years, especially when it comes to its dialogue with television.

### ***Pay TV***

Brazilian pay TV offers VoD service through the dedicated networks of the operators and OTT services, via internet. Therefore, two models coexist: one in which pay TV remains with its traditional formula; and another in which it joins VoD and provides this

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<sup>37</sup> Cf. <http://www1.folha.uol.com.br/ilustrada/2017/11/1933663-rede-globo-e-globosat-somam-esforcos-para-enfrentar-netflix-em-streaming.shtml>. Accessed in: Mar. 2018.

<sup>38</sup> For example, channel ZBTECK ZBT anticipated the chapters of *Um Caminho para o Destino* (Televisa, 2016), even though they had not yet been broadcast by SBT.

service. The complexity of the environment, however, goes beyond these notions: just as pay TV channels produce content, VoD services also follow this path, which makes “pure” OTTs compete at various stages of the pay TV chain.

Thus, the television fiction distribution configurations change: series *Carcereiros*, as we mentioned in the introduction, debuted in full in the application Globo Play and it was shown on pay TV on channel Mais Globosat, before going to Globo on open TV.<sup>39</sup>

In Brazil, broadband penetration surpasses that of pay TV, which makes the country an important market for VoD platforms.<sup>40</sup> Among them, the main one is Now (América Móvil) – more than 1.3 billion streamings<sup>41</sup> –, which has its largest audience of television fiction in the comedy genre, such as *Vai que Cola* (Multishow) and *Os Homens São de Marte e É Pra Lá que Eu Vou* (GNT).

### *Netflix*

Netflix, the “pure” OTT platform, started operating in Brazil in 2011, with a catalog of films, shows and TV programs (Ladeira, 2013). Today, in the first place among the video services in streaming in Brazil, it is used by 91% of the public.<sup>42</sup>

The first Brazilian “Netflix original” series debuted in November 2016: it is 3%, a science fiction performed by independent producer Boutique Filmes. Distributed worldwide, it was the most watched non-English language series in the United States.<sup>43</sup> For 2018, the second season is scheduled, as well as the premiere of *O Mecanismo*, inspired by the controversial Lava-Jato operation of the federal police. There are also two other Brazilian productions in progress.

<sup>39</sup> *Carcereiros* will be aired by Globo in 2018.

<sup>40</sup> Cf. <http://teletime.com.br/17/07/2017/setor-de-tv-paga-amplia-aposta-em-vod-sem-abrir-mao-do-modelo-tradicional/>. Accessed in: Mar. 2018.

<sup>41</sup> Cf. <http://nextvnews.com/alessandro-maluf-o-now-e-hoje-a-principal-plataforma-de-streaming-de-video-disponivel-no-brasil/>. Accessed in: Mar. 2018.

<sup>42</sup> Cf. <http://www.b9.com.br/84968/no-brasil-97-do-publico-consome-streamings-de-video-e-netflix-e-a-queridinha-da-galera/>. Accessed in: Mar. 2018.

<sup>43</sup> Cf. [http://www.huffpostbrasil.com/2017/03/17/primeira-serie-brasileira-da-netflix-3-virou-um-baita-sucesso\\_a\\_21901598/](http://www.huffpostbrasil.com/2017/03/17/primeira-serie-brasileira-da-netflix-3-virou-um-baita-sucesso_a_21901598/). Accessed in: Mar. 2018.

Netflix's market strategies, in addition to making available all the chapters/episodes, motivating binge watching, still seek to obtain the maximum public engagement, appealing to affection, proximity and familiarity, which symbolically stimulates the development of local productions. In this sense, it is important to remember that, in some countries, there is a mandatory quota of national content in VoD, issue still being studied in Brazil.

### ***Reconfiguration and complexity: new dynamics, new paradigms***

Initially viewed as rivals, the new media came to be allied with open TV and pay TV, reconfiguring the panorama of television fiction in Brazil. In open TV, the increase in actions that encourage audience participation in the web universe and the multiplication of screens are important factors (Mendes and Amaral, 2016). Regarding pay TV, the sector extends the bet on VoD without, however, giving up the traditional means. In relation to Netflix, there is a strategy to stimulate the development of local productions. Finally, YouTube points to new rituals (Martín-Barbero, 2001) by the audience, as it enables performances and interactions between different audiences.

These reconfigurations also come into conflict with the strength of the telenovela, which remains a paradigm for other formats, both in terms of narrative parameters and production logic. In 2018, Globo's Weekly Drama sector, responsible for managing the series for open channel, pay TV and digital platforms, was unified to the area of Daily Dramaturgy<sup>44</sup>, in charge of telenovela supervision, betting on the deepening of the dialogue between the two formats.

The Pay TV Law, on the other hand, extended the performance of independent producers in order to create narratives of short seriality, affecting the labor market and business possibilities. There is also experimentation with new production models, typical of North

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<sup>44</sup> Cf. <http://www.meioemensagem.com.br/home/ultimas-noticias/2018/03/02/globo-unifica-areas-de-dramaturgia-sob-comando-de-silvio-de-abreu.html>. Accessed in: Mar. 2018.



American models, which will bring new pieces and actors to compose this dynamic.

It is unquestionable that new audiovisual platforms further complicate production logics and reception skills (Martín-Barbero, 2001). However, a greater distance is needed to see how these dynamics will act in terms of industrial formats and cultural matrices. In a continuous expansion, studies and research on television fiction are faced with issues that involve paradigm adjustments. The question of what we consider television – in television itself and in other environments – tends to be one of the most problematic issues.

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CHILE: SEARCHING FOR THE LOST AUDIENCE<sup>1</sup>*Authors:*

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### 1. Chile's audiovisual context in 2017

It is a fact that something has happened with the national television channels' audience in the last year. Although not significant, there has been a fall in the numbers when comparing the 42% audience that open television had in 2005 to the 39% achieved in 2017. The rating per household is falling and that of cable television not only stopped its ten-year growing period, but slightly decreased.

Regarding the offer, last year there was a drop in the Ibero-American titles, shown by the reduction to a half of the hours of exhibition of regional fiction. Although the Turkish telenovelas no longer have the success they had when they began to be broadcast in 2014, what matters nowadays is their volume of titles. In any case, despite the changes, telenovela continues to be the fiction format with the greatest presence on television.

The figures from the National Television Council show that people still prefer to watch television with their families, and that the penetration of other video platforms through the internet already surpasses 15% of the population. The access to internet through mobile phones—82% of the population has some form of connection in those devices—is linked to these new forms of watching television.

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<sup>1</sup> The authors wish to thank Kantar Ibope Media Chile, a company that makes possible this work through its invaluable collaboration.

Apparently, the relative importance of television as a platform to access fiction shows has diminished, but this does not mean that there are fewer people watching this type of content. Although the percentages have slightly fallen, the audience in general terms remains within the 40% margin and, as we will show, the new VoD platforms also present new and different options to consume fiction, especially for the younger audience. There is an audience and an audiovisual consumption, but which platform they use is still unclear. In this chapter, we hope to give clues to find that lost audience.

1.1. Open TV in Chile

Chart 1. Open TV national stations in Chile

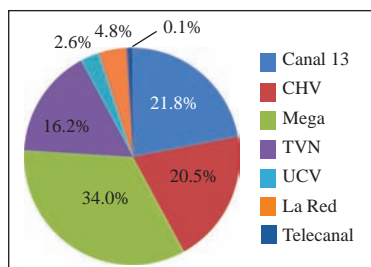
Private channels (6)	Public channels (1)
Canal 13: Luksic group (67%), Pontifical Catholic University of Chile (33%) Chilevisión (CHV): Time Warner, through Turner Broadcasting System La Red: belongs to Albavisión group Mega: Grupo Bethia (72.5%), Discovery Communications (27.5%) Telecanal: belongs to Inversiones Alfa Tres (linked to Albavisión) UCV: GCO EntretenCIÓN Group	TVN, exclusively advertising-funded
Total number of channels: 7	

Source: Obitel Chile

The year 2017 was the period in which the university television model, established 60 years ago in Chile, came to an end. The Catholic University of Chile sold its share in Canal 13 to Luksic group, thus putting an end to both the only participation left of an academic entity in television and to the last link of the Catholic Church in a mass media.

**Graph 1. TV rating and share per channel during 2017<sup>2</sup>**

Channel	Household rating (%)	Total TV share (%)	Share in open TV (%)
Canal 13	5.4	13.6	21.8
CHV	5.1	12.8	20.5
Mega	8.4	21.3	34.0
TVN	4.0	10.2	16.2
UCV	0.7	1.7	2.6
La Red	1.2	3.0	4.8
Telecanal	0.0	0.1	0.1
<b>Total open TV</b>	<b>24.8</b>	<b>62.6</b>	<b>-</b>
<b>Total pay TV</b>	<b>14.8</b>	<b>37.4</b>	<b>-</b>
<b>Total pay and open TV</b>	<b>39.7</b>	<b>100.0</b>	<b>100.0</b>

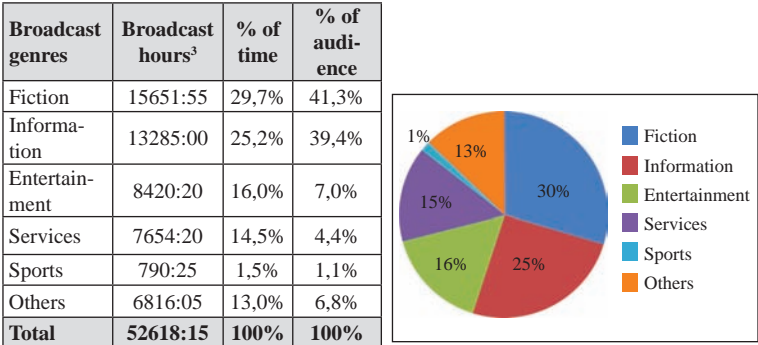


Source: Kantar Ibope Media Chile

There is not a significant change in the overall audience results from 2016 to 2017. Mega remains the leader in audience of national television channels, even doubling Televisión Nacional de Chile (TVN), which is now in the last place of the so-called main channels. Chilevisión and Canal 13 compete for the second and third places with a difference of almost three points with the leader, closer to TVN and not exactly in a comfort zone. As we will see later, the various programming strategies of Canal 13 point to a search for differentiation and an audience rise.

<sup>2</sup> Household ratings consider a 24-hours a day period, regardless of the transmission time slots of the channels.

**Graph 2. Genres and hours in TV programming during 2017**



Source: Kantar Ibope Media Chile – Obitel Chile

The fiction and the informative content decidedly dominate the offer of contents in open television. The absence of a major world sporting event during 2017 relegated sports coverage to barely over 1% of the programming time. In the case of fiction, compared to the previous year, the exhibition time fell almost 5 points, leaving it just under 3 thousand hours in 2017. This remaining time was divided into informative content, entertainment, service programs and others, all of which went up in 2017.

**1.2. Audience trends over the year**

Despite the diversification of the platforms through which television content can be accessed, television continues to be the preferred medium in front of which people gather to share. According to the National Television Council, 61% of people still watch TV as a family, especially those who have access to cable television and children under 13 years old (CNTV, 2017:23). In fact, families prefer to watch national television channels (70%) and channels that can only be seen through cable TV (52%). Of the families that watch television programs together, 15% of them do so via internet.

<sup>3</sup> For presentation purposes, the times on this and the following tables are rounded to five minutes.

Regarding phenomena such as sharing and commenting on what is seen on television through social networks (social TV), this is still a behavior mostly associated with the younger segments of the population.

### **1.3. Advertising investments of the year: in TV and in fiction**

The relative decline of advertising investment in Chile has become an incontestable trend. According to figures from the Chilean Association of Advertising Agencies, in 1997 advertising investment in Chile represented 0.93% of GDP; in 2007, it was 0.6% and, in 2017, 0.45%. In per capita terms, the maximum was registered in 2012, with US\$ 76.7 per inhabitant, while last year it reached US\$ 67.8. This affects the whole sector, but in the case of open television, the situation is aggravated because, in addition, there is a reduction of its participation in these numbers. Concretely, advertising investment in open television was US\$ 436 million, which represents a fall of 2.6% over the previous year.

### **1.4. Merchandising and social merchandising**

The use of fiction as a deliberate instrument to promote social causes is rare in Chile – a big contrast with countries such as Brazil or Mexico, with a strong tradition in this area. However, in 2017 a production, *La Colombiana*, broke the mold completely.

In the last decade, the phenomenon of immigration has gained relevance and visibility in Chile: population movements with bordering countries are frequent, but recent immigration, which has become the subject of debate in public opinion, comes from Colombia, Venezuela, the Dominican Republic or Haiti. Each one has a very different nature. As in other countries, the migratory wave has been rejected by some sectors of the population, and there is a surge of xenophobic expressions.

TVN, the public channel, saw the phenomenon as an opportunity. In the hours prior to the news, it programmed *La Colombiana*, a telenovela starring Colombian actress Elizabeth Minotta, who

plays a young mother who arrives to Chile looking for a new life and faces discrimination problems.

Although it was not a great audience success, it fulfilled its objective of giving visibility to the subject through deeply relatable characters. The embassies of Peru and Colombia made an explicit acknowledgment of the contribution that this production represented.

*La Colombiana* had a spin off through the webseries *James Style*, a Colombian hairdresser with a secondary role in the tele-novela that became very popular.

### **1.5. Communication policies**

Although it has not had a major media impact at the national level, the implementation of digital terrestrial TV has continued within the framework of Law n. 20,750, of 2014, on Digital TV (DTT), and its regulations issued in 2015. The deadline to end the analog transmissions of free reception television is set for April 2020.

As for the reception in large cities, in 2017 DTT is received throughout the Metropolitan Region (which accounts for approximately one third of the country's population), Valparaíso, Concepción, Temuco and Rancagua, meaning that more than half of the country already receives it. For those border areas with scarce population and difficult access to the territory – 120 localities –, the State has already implemented an alternative solution to terrestrial transmission: they developed a self-installing satellite antenna and decoder kit, which will broadcast the national DTT signal via satellite for the 30 thousand homes located in remote areas. The pilot plan began in northern Chile, with over a hundred households.

Likewise, the government opened public tenders for the new digital concessions of 116 frequencies available throughout Chile; 154 applications were submitted. This process is carried out by the National Television Council and its results are expected in early 2018.

## **1.6. ICT trends**

Interestingly, the growth in the number of subscribers to mobile telephony has stagnated over the last year, probably because since the beginning of the decade the official figures pointed to a penetration of more than 100% and to the conditions of the national economy. In September 2017, the percentage of growth compared to the last 12 months was negative, with a variation of 0.4%. The positions of mobile telephone companies have remained the same as last year, although the relative share of each one has changed: the dominants – Entel PCS, Movistar and Claro – fell slightly, while WOM has been growing permanent since its entry in 2010. In the last year, its participation in the market increased by more than 30%, as indicated by the statistics of the Undersecretariat of Telecommunications (Subtel, 2018).

The growth in the use of 4G technology and access to the internet via mobile telephony needs to be highlighted due to its potential of accessing audiovisual content wirelessly. In September 2017, the penetration of this technology was of 83.72% of the population, a figure much higher than that of fixed internet connections, which at the same time had a penetration of 16.64%. It should be noted that, during the last year, mobile companies offered flat rate subscription plans to access certain audiovisual contents, although with a limit on monthly data traffic. This commercial strategy could be one of the reasons for the constant increase in the use of mobile internet.

According to data of the IX National Television Survey, conducted by the National Television Council in 2017, smart TVs reach a 35% penetration, while 42.9% of the population's highest socioeconomic class (ABC1) have a subscription to internet TV services; the lowest socioeconomic groups, D and E, only reach 8.5% and 2.7%, respectively. Regarding the electronic devices for accessing content, the mobile phone is the most widespread, with 82% of presence in households. It is followed by the notebook (52%) and the tablet (32%). The desktop computer is only present in 23% of the cases, and the devices to receive TV and video over the internet,



such as AppleTV, Google Chromecast or other decoders, have only 12% of presence in households.

### **1.7. Public TV**

After several years of heavy economic losses (US\$ 25 million in 2015 and US\$ 16 million in 2015), TVN, the Chilean public channel – funded solely by advertising –, finally collapsed. The imminence of bankruptcy urged the Congress to approve a capitalization plan that had been postponed: TVN received US\$ 47 million, in addition to another US\$ 18 million to develop a public channel devoted to children and culture. Actually, the capitalization resources are being used to sort the channel's liabilities and to give it time to return to a balance situation, as well as to put an end to the four-year period being fourth in the audiences' ranking and last among the large channels. On the other hand, the children-cultural channel project seems stagnated and there has been no political will to push it.

### **1.8. Pay TV**

Until September 2017, the penetration of pay television has had a slow but steady growth. Compared to the previous year, the total variation was 7.5%, a figure that includes a 10% growth in the number of television subscribers via coaxial cable, and 5.1% in satellite cable. The official figures given by the Chilean Undersecretary of Telecommunications indicate that the total number of subscribers of pay TV was 3,246,457 in the last quarter of 2017. After three years in which the number of subscribers of direct-to-home satellite television exceeded the cable subscriptions, in 2017, the difference between both platforms was a little more than 15 thousand subscribers.

As for the audience, there has been a general stagnation, and, even in general terms, pay television has dropped for the second year in a row. There have also been no changes regarding the exhibition of national television fiction. As in the previous period, the most relevant channels are the ones that broadcast news, cultural content and entertainment. Something more dynamic has been the

incursion of pay TV platforms in the VoD offer, a topic that will be discussed later.

### **1.9. Independent production companies**

Although the most radical actions have occurred during 2018 (the closure of Canal 13's drama area and the announcement that its production will be outsourced to Fábula TV, the local partner of Secuoya), the underlying phenomenon has been incubating in recent years. The economic crisis of the open television channels has pushed them to reduce their fixed costs, which has resulted in outsourcing – totally or partially – their fiction production to independent producers, such as Bowen DDR, Fábula TV, Wood Producciones or AGTV, among others.

### **1.10. International trends**

Undoubtedly, the phenomenon of Turkish telenovelas continues to be the protagonist of the trends in the Chilean market, mainly since – due to their presence – Mexican productions, which used to be very relevant, have diminished; and nowadays they are supported only by products such as *La Rosa de Guadalupe*, which adds hours of programming but is marginal in terms of audience. The phenomenon that we are currently living, partly with the Turkish productions, happened once on Chilean television, when Mega was owned by Televisa; then, from the organization of the Festival of Viña del Mar, there was a Mexicanization in the offer of that channel, although with very different results to those of the Turkish telenovelas, which are more successful.

In 2017, Mega subscribed an agreement with Globo, from Brazil, which implies that the Chilean station of Bethia group has the priority to broadcast their telenovelas, a prerogative that Canal 13 had for more than three decades, until 2016. From then on, Mega began to bet on productions from other origins, with very dissimilar results. This led the channel to use the clause that allows it to

retransmit some old productions of Globo, thus broadcasting *Siete Mujeres*, a telenovela of 2004.

## 2. Analysis of the year: national and Ibero-American premiere fiction

**Table 1. Fiction broadcast in 2017 (national and imported; premieres and reruns; co-productions)**

PREMIERE NATIONAL TITLES (21)	PREMIERE FOREIGN TITLES (25)
<b>Canal 13</b> 1. <i>Irreversible</i> (unitary) 2. <i>Papá Mono</i> (series) 3. <i>Preciosas</i> (telenovela)	<b>CHV</b> 1. <i>Amar Después de Amar</i> (telenovela – Argentina) 2. <i>Esperanza Mía</i> (telenovela – Argentina)
<b>CHV</b> 4. <i>12 Días que Estremecieron a Chile</i> (unitary) 5. <i>Lo que Callamos las Mujeres</i> (unitary) 6. <i>Vidas en Riesgo</i> (docudrama)	<b>La Red</b> 3. <i>Águila Roja</i> (series – Spain) 4. <i>El Barco</i> (miniseries – Spain) 5. <i>Amo Despertar Contigo</i> (telenovela – Mexico) 6. <i>Como Dice el Dicho</i> (unitary – Mexico) 7. <i>El Vuelo de la Victoria</i> (telenovela – Mexico) 8. <i>La Rosa de Guadalupe</i> (unitary – Mexico) 9. <i>Mi Adorable Maldición</i> (telenovela – Mexico) 10. <i>Mi Corazón es Tuyo</i> (telenovela – Mexico)
<b>Mega</b> 7. <i>Amanda</i> (telenovela) 8. <i>Ambar</i> (telenovela) 9. <i>Neruda (La Serie)</i> (miniseries) 10. <i>Perdona Nuestros Pecados</i> (telenovela) 11. <i>Señores Papis</i> (telenovela) 12. <i>Tranquilo Papá</i> (telenovela) 13. <i>Verdades Ocultas</i> (telenovela)	<b>Mega</b> 11. <i>A Través del Tiempo</i> (telenovela – Brazil) 12. <i>Justicia</i> (miniseries – Brazil) 13. <i>Totalmente Diva</i> (telenovela – Brazil)
<b>TVN</b> 14. <i>62: Historia de un Mundial</i> (miniseries) 15. <i>Dime Quién Fue</i> (telenovela) 16. <i>El Camionero</i> (telenovela) 17. <i>La Colombiana</i> (telenovela) 18. <i>Ramona</i> (miniseries) 19. <i>Un Diablo con Ángel</i> (telenovela) 20. <i>Wena Profe</i> (telenovela)	<b>Telecanal</b> 14. <i>Comando Elite</i> (series – Colombia) 15. <i>El Estilista</i> (series – Colombia) 16. <i>Tres Caínes</i> (telenovela – Colombia) 17. <i>Grachi</i> (telenovela – USA Hispanic) 18. <i>Alias el Mexicano</i> (series – Mexico) 19. <i>Antes Muerta que Lichita</i> (telenovela – Mexico)
<b>UCV</b> 21. <i>Taller de Video</i> (series)	

<p>20. <i>La Vida es una Canción</i> (unitary – Mexico)</p> <p>21. <i>Lo que la Gente Cuenta</i> (unitary – Mexico)</p> <p><b>TVN</b></p> <p>22. <i>Josué y la Tierra Prometida</i> (telenovela – Brazil)</p> <p>23. <i>Moisés y los Diez Mandamientos</i> (telenovela – Brazil)</p> <p>24. <i>Los Milagros de Jesús</i> (series – USA Hispanic)</p> <p>25. <i>Altagracia</i> (telenovela – Mexico)</p> <p><b>PREMIERE OBITEL CO-PRODUCTIONS (2)</b></p> <p><b>CHV</b></p> <p>1. <i>Sin Senos Sí Hay Paraíso</i> (telenovela – Obitel co-production)</p> <p><b>Mega</b></p> <p>2. <i>El Regreso de Lucas</i> (telenovela – Obitel co-production)</p> <p><b>RERUN NATIONAL TITLES (5)</b></p> <p><b>CHV</b></p> <p>1. <i>Cartas de Mujer</i> (unitary)</p> <p>2. <i>Violeta se Fue a los Cielos</i> (miniseries)</p> <p><b>TVN</b></p> <p>3. <i>Somos los Carmona</i> (telenovela)</p> <p><b>UCV</b></p> <p>4. <i>Cronistas Ciudad en Letras</i> (miniseries)</p> <p>5. <i>Los Años Dorados</i> (sitcom)</p> <p><b>RERUN FOREIGN TITLES (24)</b></p> <p><b>Canal 13</b></p> <p>1. <i>Siete Mujeres</i> (telenovela – Brazil)</p>	<p><b>La Red</b></p> <p>2. <i>Hay Alguien Ahí</i> (series – Spain)</p> <p>3. <i>Corazón Indomable</i> (telenovela – Mexico)</p> <p>4. <i>El Chapulín Colorado</i> (sitcom – Mexico)</p> <p>5. <i>Mujer Casos de la Vida Real</i> (docudrama – Mexico)</p> <p><b>Mega</b></p> <p>6. <i>El Chavo del Ocho</i> (sitcom – Mexico)</p> <p><b>Telecanal</b></p> <p>7. <i>Impostores</i> (serie – Argentina)</p> <p>8. <i>Sirvienta a Domicilio</i> (sitcom – Brazil)</p> <p>9. <i>El Capo 2</i> (telenovela – Colombia)</p> <p>10. <i>El Capo 3</i> (telenovela – Colombia)</p> <p>11. <i>Las Noches de Luciana</i> (telenovela – Colombia)</p> <p>12. <i>Pedro el Escamoso</i> (telenovela – Colombia)</p> <p>13. <i>Séptima Puerta</i> (unitary – Colombia)</p> <p>14. <i>Sin Retorno</i> (series – Colombia)</p> <p>15. <i>Decisiones</i> (series – USA Hispanic)</p> <p>16. <i>Quiero Mis 16: Matilda</i> (telefilm – USA Hispanic)</p> <p>17. <i>A Cada Quien su Santo</i> (unitarys – Mexico)</p> <p>18. <i>Chespirito</i> (sitcom – Mexico)</p> <p>19. <i>La Duda</i> (telenovela – Mexico)</p> <p>20. <i>Lo que la Gente Cuenta</i> (unitary – Mexico)</p> <p>21. <i>Muchacha Italiana Viene a Casarse</i> (telenovela – Mexico)</p> <p><b>TVN</b></p> <p>22. <i>Doña Xepa</i> (telenovela – Brazil)</p> <p>23. <i>El Zorro</i> (telenovela – Colombia)</p> <p>24. <i>La Tormenta</i> (telenovela – Colombia)</p> <p><b>TOTAL PREMIERE TITLES: 48</b></p> <p><b>TOTAL BROADCAST TITLES: 77</b></p>
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Source: Kantar Ibope Media Chile – Obitel Chile

In recent years there has been a permanent decline in the number of national premiere titles: 28 in 2014, 27 in 2015, 21 in 2016 and 20 in 2017. However, the really significant change in 2017 was

the huge fall in the new titles of Ibero-American origin. In 2014, 46 titles were released; that number fell to 28 in 2015 with the Turkish irruption, but it grew to 56 in 2016. In 2017 it fell to only 27 titles, and that fall is even greater in terms of hours. While in 2016 3,470 hours of premiere television fiction of Ibero-American origin were broadcast, in 2017 the figure fell to 1,957, i.e., only 56% of what was exhibited in 2016.

**Table 2. Premiere fiction in 2017: countries of origin**

Country	Titles	%	Chapters/ episodes	%	Hours	%
<b>NATIONAL (total)</b>	<b>20</b>	<b>42.6</b>	<b>1.521</b>	<b>37.5</b>	<b>930:35</b>	<b>32.2</b>
<b>OBITEL COUNTRIES (total)</b>	<b>27</b>	<b>57.4</b>	<b>2.532</b>	<b>62.5</b>	<b>1.957:00</b>	<b>67.8</b>
Argentina	2	4.3	89	2.2	54:20	1.9
Brazil	5	10.6	350	8.6	250:25	8.7
Chile	20	42.6	1.521	37.5	930:35	32.2
Colombia	3	6.4	151	3.7	130:50	4.5
Ecuador	0	0.0	0	0.0	0:00	0.0
Spain	2	4.3	60	1.5	64:45	2.2
USA Hispanic	2	4.3	286	7.1	167:35	5.8
Mexico	11	23.4	1.503	37.1	1.221:30	42.3
Peru	0	0.0	0	0.0	0:00	0.0
Portugal	0	0.0	0	0.0	0:00	0.0
Uruguay	0	0.0	0	0.0	0:00	0.0
Venezuela	0	0.0	0	0.0	0:00	0.0
<b>CO-PRODUCTIONS (total)</b>	<b>2</b>	<b>4.3</b>	<b>93</b>	<b>2.3</b>	<b>67:40</b>	<b>2.3</b>
National co-productions	0	0.0	0	0.0	0:00	0.0
Co-productions between Obitel countries	2	4.3	93	2.3	67:40	2.3
<b>TOTAL</b>	<b>47</b>	<b>100.0</b>	<b>4.053</b>	<b>100.0</b>	<b>2.887:35</b>	<b>100.0</b>

Source: Kantar Ibope Media Chile – Obitel Chile

Table 2 disaggregates the titles broadcast according to their country of origin. If we compare it with the data of 2016, we can observe that the fall affected the three main origins of Ibero-American fiction exhibited in Chile. Brazil dropped from 13 to five titles, Colombia from 11 to three, and Mexico from 21 to eight. Something similar happens when comparing exhibition hours, where the falls were 57%, 82% and 27%, respectively. When including Chile in the

comparison, the number of titles fell from 76 to 47, and the number of hours, from 4,550 to 2,888. This does not mean that television fiction was not broadcast in 2017 in Chile, but that the origin changed.

This is due, again, to the Turkish productions. The overwhelming success in 2014 of *Las Mil y Una Noches* and other telenovelas that followed seemed to diminish. The first places of audience returned to be Chilean this year. However, with less massive titles than at the beginning, but still successful, the Turkish invasion has continued, now increasing its volume. In 2017, 19 Turkish titles were broadcast, which represented 1,885 screen hours. Without considering the Chilean production, the hours of Turkish fiction exhibited are almost equivalent to the sum of all Ibero-American fiction.

The hourly distribution of the national fiction shows a return to the prime time. In 2016, the afternoon slot had dominated, but the 2017 figures are closer to what happened ten years ago: in 2007, more than 77% of the national fiction (in hours) was broadcast during prime time. In the case of Ibero-American fiction, the time distribution is similar to that of the previous year, with a slight increase in the presence in the afternoons, which went from 63% in 2016 to 67% this year.

**Table 3. Chapters/episodes and hours broadcast by time slot**

Time slot	National				Ibero-American				Total			
	C/E	%	H	%	C/E	%	H	%	C/E	%	H	%
Morning (6:00-12:00)	0	0.0	0:00	0.0	0	0.0	0:00	0.0	0	0.0	0:00	0.0
Afternoon (12:00-20:00)	560	36.8	351:00	37.7	1.712	67.6	1.225:50	62.6	2.272	56.1	1.576:50	54.6
Prime time (20:00-24:00)	924	60.7	552:05	59.3	605	23.9	570:30	29.2	1.529	37.7	1.122:35	38.9
Night (24:00-6:00)	37	2.4	27:30	3.0	215	8.5	160:45	8.2	252	6.2	188:10	6.5
Total	1.521	100	930:35	100	2.532	100	1.957:00	100	4053	100	2.887:35	100

Source: Kantar Ibope Media Chile – Obitel Chile

**Table 4. Formats of national and Ibero-American fiction**

Format	National				Ibero-American			
	Titles	%	C/E	%	Titles	%	C/E	%
Telenovela	12	60.0	1.070	581:50	62.5	59.3	1.393	986:15
Series	2	10.0	20	16:00	1.7	18.5	198	170:00
Miniseries	2	10.0	13	11:30	1.2	7.4	60	63:05
TV movie	0	0.0	0	0:00	0.0	0.0	0	0:00
Unitary	3	15.0	209	171:35	18.4	14.8	881	737:40
Docudrama	1	5.0	209	149:40	16.1	0.0	0	0:00
Others	0	0.0	0	0:00	0.0	0.0	0	0:00
Total	20	100.0	1.521	930:35	100.0	100.0	2.532	1.957:00

Source: Kantar Ibope Media Chile – Obitel Chile

Both in the national and Ibero-American offer, the dominant format is the telenovela. However, the proportions have changed compared to last year. While the Chilean telenovela went from occupying 54% of fiction time to 63%, the Ibero-American telenovela went from 67% to 50%.

**Table 5. Formats of national fiction by time slot**

Format	Morn- ing	%	After- noon	%	Prime time	%	Night	%	To- tal	%
Telenovela	0	0.0	2	50.0	9	60.0	1	100.0	12	60.0
Series	0	0.0	0	0.0	2	13.3	0	0.0	2	10.0
Miniseries	0	0.0	0	0.0	2	13.3	0	0.0	2	10.0
TV movie	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Unitary	0	0.0	1	25.0	2	13.3	0	0.0	3	15.0
Docudrama	0	0.0	1	25.0	0	0.0	0	0.0	1	5.0
Others	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
<b>Total</b>	<b>0</b>	<b>0.0</b>	<b>4</b>	<b>100.0</b>	<b>15</b>	<b>100.0</b>	<b>1</b>	<b>100.0</b>	<b>20</b>	<b>100.0</b>

Source: Kantar Ibope Media Chile – Orbitel Chile

Ending a phenomenon that progressed slowly since 2014, in 2017, during the afternoon, the number of national titles decreased, going from nine to four; and, more significantly, the number of telenovelas in that time slot went from five to two. On the contrary, during 2017, all formats increased their presence during prime time.

**Table 6. Time period of national fiction**

Time	Titles	%
Present	14	70.0
Period	2	10.0
Historical	2	10.0
Others	2	10.0
<b>Total</b>	<b>20</b>	<b>100.0</b>

Source: Orbitel Chile



With few exceptions, Chilean television fiction is usually set in the present. The year 2017 is no exception, but the proportion of titles set in the past (4 of 20) is out of the ordinary: two miniseries, a telenovela and a series of unitary. In addition, in this group we find the most interesting proposals of this year. *Ramona*, a miniseries highly valued by critics, set in the 1960s, and *Perdona Nuestros Pecados*, the telenovela that led the rankings in 2017 and continues to do so during 2018.

**Table 7. The ten most watched titles**

	Title	Country of the original idea or script	Channel	Format/genre	N. of chap./ ep. (in 2017)	Time slot	Rating	Share
1	<i>Perdona Nuestros Pecados</i>	Chile	Mega*	Telenovela/drama**	168	Prime time	28.8	42.5
2	<i>Señores Papis</i>	Argentina	Mega*	Telenovela/drama-comedy**	30	Prime time	24.2	36.5
3	<i>Amanda</i>	Chile	Mega*	Telenovela/melodrama**	141	Afternoon	20.3	40.8
4	<i>Verdades Ocultas</i>	Chile	Mega*	Telenovela/melodrama**	111	Afternoon	18.9	39.3
5	<i>Tranquilo Papá</i>	Chile	Mega*	Telenovela/drama-comedy**	181	Prime time	16.4	27.1
6	<i>Justicia</i>	Brazil	Mega	Miniseries/drama	17	Night	15.9	27.6
7	<i>Ambar</i>	Chile	Mega*	Telenovela/melodrama**	67	Prime time	15.6	27.0
8	<i>Totalmente Diva</i>	Brazil	Mega	Telenovela/drama**	121	Afternoon	11.5	22.0
9	<i>Moisés y los Diez Mandamientos</i>	Brazil	TVN	Telenovela/melodrama**	9	Prime time	11.3	18.0
10	<i>El Regreso de Lucas</i>	Argentina	Mega	Telenovela/drama	61	Afternoon	10.9	22.4
<b>Total national productions:</b>					<b>Foreign scripts:</b>			
60%					50%			

\* National production; \*\* the broadcasting started in 2016 or continues in 2018.

Source: Kantar Ibope Media Chile – Obitel Chile

Among the most viewed titles in 2017, there are six national productions, five of them in the first five places, and four other Ibero-American productions. It should be noted that until 2013, before the Turkish invasion and since this report exists, the top ten places – not only Ibero-American ones – were always held by Chilean titles. Since 2015, some Ibero-American titles have entered the top ten; this is not necessarily due to their success, but to the audience falling of national productions in favor of the Turkish productions. This year, national productions partially recovered the first places, but, if the list were also opened to the Turkish productions, three of them would have entered the top ten, letting three of the four Ibero-American productions out of it.

**Table 7a. The ten most watched national titles**

	Title	Origin of the original idea or script	Channel	Format/genre	N. of chap./ep. (in 2017)	Time slot	Rating	Share
1	<i>Perdona Nuestros Pecados</i>	Chile	Mega	Telenovela/drama	168	Prime time	28.8	42.5
2	<i>Señores Papis</i>	Argentina	Mega	Telenovela/drama-comedy	30	Prime time	24.2	36.5
3	<i>Amanda</i>	Chile	Mega	Telenovela/melodrama	141	Afternoon	20.3	40.8
4	<i>Verdades Ocultas</i>	Chile	Mega	Telenovela/melodrama	111	Afternoon	18.9	39.3
5	<i>Tranquilo Papá</i>	Chile	Mega	Telenovela/drama-comedy	181	Prime time	16.4	27.1
7	<i>Ambar</i>	Chile	Mega	Telenovela/melodrama	67	Prime time	15.6	27.0
11	<i>Preciosas</i>	Chile	Canal 13	Telenovela/action-comedy	16	Prime time	10.1	16.7
13	<i>El Camionero</i>	Chile	TVN	Telenovela/melodrama	49	Prime time	10.0	18.1
14	<i>Un Diablo con Ángel</i>	Chile	TVN	Telenovela/comedia	70	Prime time	9.4	14.0
15	<i>62: Historia de un Mundial</i>	Chile	TVN	Miniseries/drama	4	Prime time	8.9	14.2
<b>Total national productions:</b>					<b>Foreign scripts:</b>			
100%					10%			

Source: Kantar Ibope Media Chile – Obitel Chile

Table 7 shows that eight of the ten titles began in 2016 or extended to 2018. Although something similar can be seen in previous years, it constitutes a change in the historical behavior of national channels, whose competition tended to concentrate between March and December. That changed and now there is also a competition in the summer months, when the audience drops.

Another fact that stands out is the dominion of the telenovela. Nine of the top ten titles are telenovelas, regardless of the exploration efforts of other formats.

**Table 8. Audience profile of the ten most watched titles:  
gender, age, socioeconomic status**

Title		Channel	Gender %		Socioeconomic status %			
			Women	Men	ABC1	C2	Women	Men
1	<i>Perdona Nuestros Pecados</i>	Mega	63.3	36.8	5.6	17.5	32.0	44.9
2	<i>Señores Papis</i>	Mega	61.8	38.2	6.2	19.3	24.9	49.7
3	<i>Amanda</i>	Mega	68.1	31.9	4.5	14.2	27.5	53.9
4	<i>Verdades Ocultas</i>	Mega	70.2	29.8	4.5	15.4	32.3	47.8
5	<i>Tranquilo Papá</i>	Mega	63.3	36.7	6.1	17.2	30.1	46.6
6	<i>Justicia</i>	Mega	63.6	36.4	5.8	14.9	36.2	43.2
7	<i>Ámbar</i>	Mega	66.3	33.7	4.7	17.5	24.7	53.2
8	<i>Totalmente Diva</i>	Mega	66.6	33.4	6.4	15.0	29.0	49.6
9	<i>Moisés y los Diez Mandamientos</i>	TVN	58.5	41.5	4.3	18.8	27.1	49.9
10	<i>El Regreso de Lucas</i>	Mega	68.9	31.1	4.8	11.8	27.7	55.7

Titles		Age range %						
		04-12	13-17	18-24	25-34	35-49	50-64	65+
1	<i>Perdona Nuestros Pecados</i>	6.2	3.9	11.4	17.3	23.9	22.8	14.6
2	<i>Señores Papis</i>	7.9	4.9	12.0	16.3	23.8	20.7	14.4
3	<i>Amanda</i>	7.1	3.9	9.8	12.9	19.9	24.9	21.5
4	<i>Verdades Ocultas</i>	7.3	4.0	8.9	13.8	20.7	23.2	22.1
5	<i>Tranquilo Papá</i>	7.4	5.0	10.0	14.7	25.0	22.5	15.4

6	<i>Justicia</i>	6.4	3.3	11.0	18.3	26.2	22.1	12.7
7	<i>Ámbar</i>	7.8	5.2	8.4	12.6	24.5	23.8	17.8
8	<i>Totalmente Diva</i>	5.1	4.2	8.2	14.7	20.4	27.2	20.2
9	<i>Moisés y los Diez Mandamientos</i>	3.1	3.3	4.3	13.6	17.9	31.3	26.6
10	<i>El Regreso de Lucas</i>	7.2	4.0	8.4	14.0	17.4	28.6	20.5

Source: Kantar Ibope Media Chile

As in 2016, *Moisés y los Diez Mandamientos* is the only title of the top ten that attenuates the marked feminine profile of the audiences. The same happens in terms of age, since this Brazilian telenovela has an audience notoriously older than the other productions.

### 3. Transmedia reception

Once again, regardless of the availability of series and telenovelas episodes on the sites of Chilean channels and on YouTube, there were no cases of transmedia production and reception of Chilean fiction. In the case of fiction programming, particularly for telenovelas, the stations have created specific groups, in the case of Facebook, and hashtags (the use of #) for Twitter or Instagram to motivate the conversation among their followers. Their use is promoted during the broadcast of the episodes through screen announcements. In the case of *Perdona Nuestros Pecados*, one of the most watched productions of the year, this has led to the creation of new groups and users by followers of the series. For example, the Twitter and Instagram accounts of the protagonists (M. Elsa and P. Reynaldo) or the group of Facebook memes *Perdona Nuestros Pecados*.

A more interesting case has emerged around the main character of telenovela *Soltera Otra Vez*. Since the previous season, broadcast in 2013, Canal 13 had created Facebook, Twitter and Instagram accounts in its name. These accounts remained active during the time when the series was on season break. They included videos of Cristina, the leading character, wishing Happy Easter or showing the

balance of her (fictitious) bank account. When the new season was announced, the accounts were reactivated. Cristina shared memories of five years ago and showed images of the first season.

Once the series was aired, Cristina shared her impressions on the best moments of each episode. She has also asked for help to do the shopping for her unborn baby. The latter has resulted in a novel advertising strategy: Cristina buys in a specific department store (sponsor of the telenovela). She received comments that referred to the story and to previous seasons: “In 1000 installments? Did you finish paying Gustavo’s watch? And the wedding dress?<sup>4</sup> Oh! Cristiíiii!”; as well as recommendations about motherhood: “Diapers, Cristi, diapers ... Clothes are reusable ... But diapers... Good luck!”. There were also critics to the store: “I hope you get them before the baby goes to college, because I bought an armchair and it took more than a month to arrive, ha, ha, ha!”.

Thus, the account has allowed a continuity between the three seasons, broadcast at non-consecutive periods, added new layers to the television narrative and tried new forms of advertising.

#### 4. Highlights of the year

In her doctoral thesis and from the contributions of various Latin American theorists, Constanza Mujica understands the telenovela as

an audiovisual genre of serialized fiction that appropriates some of the main features of traditional melodrama: archetypal characters representing the struggle of good and evil, pathetic enunciation and visualization of pain, the search for an unrecognized identity, presence of “figures of excess” and music to increase the affective bond. [...] The texts of this genre establish empathic relations, of rejection or attraction, towards archetypal characters repre-

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<sup>4</sup> This wedding dress was bought at the end of the previous season.

sending different values and projects, regarding the constitution of family as the social core. These texts dialogs use a visual grammar guided by the conventions of Hollywood realism, particularly close-ups and musical affectivity (Mujica, 2009: 39).

This definition is usually complemented by a characterization of the telenovela as a format. In the telenovela, the classic dramatic structure prevails. The first episodes present the characters and show the break of the balance, which is recovered at the end, when the valuation dispute stated during its development is solved: the good ones are rewarded through the happiness of a pure love, usually sanctified by marriage; and the bad ones are punished with death, madness or prison. This structure is defined from the start and must be respected to guarantee the perception of internal coherence of the telenovela (Valenzuela, 2012).

The Chilean telenovela has historically been consistent with these definitions. With the exception of *Lola* (Canal 13, 2007) – a purchase of an Argentine format and whose ending was changed halfway, along with the protagonist and all its narrative structure –, there have not been telenovelas that do not comply with these norms.

Evidently, as we documented in the 2017 Obitel report, the construction mode of the telenovela has changed in the last ten years. Since the emergence of nighttime telenovelas, there have been in Chile suspense telenovelas, where the centrality of the melodrama is mitigated by the presence of narrative axes such as the search for a murderer or paranormal events. However, until 2017, this had not affected the structure of the Chilean telenovela.

On March 6, 2017 the first episode of Mega's second nighttime telenovela, *Perdona Nuestros Pecados*, premiered. This production maintains the melodramatic character, but it has features of suspense. A priest arrives to a town to revenge the death and rape of his sister by the most powerful man in the area. In the process,

he falls in love with that man's teenage daughter. While at first the protagonists question whether their love is wrong, relatively early in the story they have sex, justified by the priest as correct because God cannot "be against" a love like his.

*Perdona Nuestros Pecados* has become the second most watched telenovela in the nighttime slot since 2004. This phenomenon encouraged Mega to propose a second season shortly after.

The only similar antecedent until then had been *Soltera Otra Vez* (Canal 13, 2012), a telenovela that recounts the vicissitudes experienced by a woman of just over 30 after being deceived by her partner. In that case, the telenovela followed the canonical style of the format. A year later a second season, also of a canonical nature, was aired, which accounts for Cristina's attempts to have a relationship with her neighbor.<sup>5</sup>

*Perdona Nuestros Pecados* is, thus, the first rupture of the telenovela format. Is it possible, then, to talk about an approach of the Chilean telenovela to the phenomenon of the superseries – halfway between the series and the telenovela – that *Obitel* United States has described in recent years? To a certain extent, yes, since the criteria of commercial success resulted in changes in the narrative construction. However, in terms of content, the attachment to melodrama remains and the narrative construction does not differ from that of other Chilean nighttime telenovelas.

Additionally, although the first season presented a circular closure (the season is a flashback that begins with the entrance to the village's church of a bloody father Reynaldo and ends with the repetition of that same scene), the fact that the second season started the following Monday relativizes the sensation of suspense and cliff-hanger usually presented by the series' season end. In fact, some of the followers of the series commented on the page of Mega.cl that this "was one episode more".

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<sup>5</sup> A third season has been released in 2018, now with formal changes, which will be discussed in the next yearbook.

Nor does there seem to be a change in the central narrative structure proposed at the beginning of the telenovela. This is confirmed by screenwriter Pablo Illanes:

Before we started recording the episodes, we generate a document called *bible* or *road map*, which are all the facts of the series summarized as in a novel. It has a hundred and many pages and I think it is the most valuable document that exists now. It is divided by acts: act 1, 1953; act 2, 1958; act 3, decade of 1960, because we do not know until when we are going to continue. We realized, when we arrived at the second act, in 1958, that we had all the third yet to go and the telenovela was finishing. So Quena (Rencoret) said: “Why don’t we do a second season?”; and we all said: “What a good idea!” It was not an extension. What we are going to see from Monday on is the last act of this document (Ahora Noticias, 2018).

The second season of *Perdona Nuestros Pecados* looks like a first indication of greater production versatility – in an industry faced with a generalized decrease in audiences – rather than a change in terms of audiovisual formats. However, it will be interesting to observe if this ductility results in new changes.

Other trends: in 2017 premiered – with moderate audience results – a series which has been rated by the critics as one of the best Chilean ones: *Ramona*, by Wood Productions, responsible for films like *Violeta se Fue a los Cielos* and *Machuca* and series like *Los 80* and *Ecos del Desierto*. It is about the life of a young girl who, in 1967, migrates from the countryside to a camp in Santiago. The series shows the changes in the social relations of Chile in the 1960s from the perspective of people of low socioeconomic level. The protagonist is a fighter, a woman who seeks to change her life, and the audiovisual style is highly cinematic. The series, funded by



the National Television Council, was awarded at the International Festival of Audiovisual Productions (Fipa).

## **5. Theme of the year: TV fiction on video on demand platforms**

Television continues to be the medium more consumed by Chileans, but during the past few years it has undergone transformations regarding its content transmission platforms. On the one hand, the subscription to cable and satellite television services continues to grow, reaching 76% of the population (CNTV, 2017), although without dethroning open television. However, a new content consumption format has been added to the industry recently: video on demand (VoD), which has triggered the beginning of a transformation process both in the production and consumption of television content and in the creation of new multimedia platforms, the development of content exclusive for this service (especially for children) and the glimpse of possible changes in the business model.

According to the IX National Television Survey of the CNTV (2017), consumption in Chile of VoD services such as Netflix or Amazon Prime increased from 2% in 2014 to 14% in 2017, which adds to the growing use of video portals like YouTube. The data published by Nielsen (2016) about VoD consumption in Chile<sup>6</sup> shows that the country is above the Latin American average regarding this way of accessing contents: seven out of ten Chileans surveyed said they saw programming through these services; in the rest of the continent, these figures are six out of ten.

The emergence of new national digital platforms to consume VoD and the arrival of international services have transformed the relationship between the user and the content. Although there has not been an exodus of cable and satellite television subscribers towards internet services (38% indicate that they would be willing to migrate, according to Nielsen, 2016), little by little they have consolidated as some of the favorite sources for entertainment content

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<sup>6</sup> Nielsen Global Video on Demand, Q3 2015.

of Chileans, mainly in the group between 15 and 34 years old. The convenience of choosing the most adequate time and place for their consumption is one of the reasons indicated by users to explain their use (Nielsen, 2016).

In Chile we can currently find five types of VoD platforms<sup>7</sup>: (1) subscription video on demand (SVoD), such as Netflix and Direct TV on Demand, in which the user makes a monthly payment to access the full catalog of available content; (2) catch-up TV, where access to the content depends on whether the user is subscribed to a cable or a satellite television service, and does not entail an extra charge, as is the case with Fox Play and HBO Go; (3) advertising video on demand (AVoD), free platforms with advertising, which have the entire catalog at the audience's disposal. Examples of this are Loop 13 (Canal 13), the websites of the television channels and YouTube; (4) hybrids between SVoD and occasional leases, such as VTR on Demand, Claro TV and Movistar on Demand, in which the user is subscribed to a cable television service and its VoD platform, but it is possible to rent content for an extra cost; (5) and, finally, public VoD platforms, as Onda Media (of the Council of Culture and Arts) and the video library of the National Television Council. These are platforms created by Chilean government institutions, which offer free access to an extensive catalog of contents of national production, in order to disseminate it.

The content of the catalogs offered by VoD platforms in Chile is varied: it incorporates foreign and national fictions (series, films and telenovelas), documentaries, docu-realities and miscellaneous programs. Among the national television fictions that reach this distribution system, the telenovelas and series stand out, especially those aimed at children, reaching 18% of the consumption of internet services (CNTV, 2017). In addition, there are Chilean films originally produced to be movies, not for television, which is why they will not be considered in this study.

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<sup>7</sup> According to Obitel's methodological proposal, except for the case "public with a social function", which is proposed based on the Chilean scenario.

By analyzing the offer of VoD platforms and their contents, it is possible to identify a direct relationship between both; thus, the classification previously proposed to identify these services allows us to give a description of Chilean television fiction in this new communication context. First, regarding SVoD platforms such as Netflix and Direct TV on Demand, there are some national fiction productions previously broadcast on different television channels throughout the decade of 2010 included in their catalogs, as opposed to contents produced exclusively for these services. Among them are *El Reemplazante* (TVN, 2012), *Bala Loca* (CHV, 2016), *Fabulosas Flores* (La Red, 2015) and some children's series such as *Cantando Aprendo a Hablar* and *Puerto de Papel* (Argentine, Brazilian, Colombian and Chilean co-production that TVN began to air during 2015). *Sitiados*, a Colombian-Chilean production (created by TVN and Promocine, and co-produced by Fox International Channels), can also be accessed through Direct TV on Demand; this represents the work of outsourcing audiovisual productions. The first season of the series is available on the platform, while its second cycle is broadcast on Fox Play, a catch-up VoD service.

Regarding this last point, it is important to mention that in catch-up platforms there are international services (Fox Play and HBO Go) that incorporate in their catalogs Chilean fictions that have been developed internationally. We could only find two cases of Chilean television products that are transmitted by these means: the already mentioned *Sitiados* and series *Prófugos*. The latter, accessible through HBO Go, is a production of Fábula and Efe3 that was originally broadcasted by HBO Latin America and is currently the only Chilean material available in the VoD system of this international chain.

In the case of hybrids that combine SVoD and occasional leases, such as VTR on Demand, Claro TV and Movistar on Demand, the Chilean television fiction presented in their catalogs is similar to the one found in the SVoD system: series that were originally broadcast on national channels and two television series that, at the time of

this analysis, are airing. Some of these programs are *Los 80* (Canal 13, 2008-2014), *Soltera Otra Vez* (its first season was broadcast in 2012 and its third cycle began airing in March 2018) and series such as *El Bosque de Karadima* and *No*, originally filmed for cinema and adapted to become miniseries. This last case is a phenomenon that has been seen in recent times on Chilean screens, in which producers adapt a film material to television, incorporating unpublished material and doing an editing work to divide it into several episodes.

As fourth case we have AVoD platforms, of free access for the user, but with an advertising business model. The sites of the different national television channels show that the media are catching up on the new mechanisms of content consumption, by uploading daily the update of the episodes of the different *telenovelas* and series on air. This same material is replicated in the YouTube accounts of the channels, two platforms in which the interaction of users with the content is possible, since they can comment in both, in addition to the possibility of sharing the content in different social networks. Within this service of VoD, the work of Canal 13 is remarkable: they have created an exclusive platform to upload their fiction products, Loop 13. In it, the station has been uploading part of its historical archive (*telenovelas* such as *Machos* and *Anakena*) and some of their current products (as *Soltera Otra Vez*). Loop 13 works as a web extension of the official site, but differs in that it is exclusively focused on the consumption of audiovisual content and seeks to replicate the format of SVoD services such as Netflix.

Finally, during the analysis of the state of VoD in Chile, we found the case of platforms promoted by State institutions, which have a public purpose of disseminating national audiovisual productions. In the case of the CNTV video library, it is possible to find a wide catalog of all the products that presented a project and were granted funds from this organization, such as *Bala Loca*, *Los 80*, *Ramona*, *Mary&Mike* and different children's series. On the other hand, OndaMedia, of the CNCA, stores series that won funds from

the State or independent productions<sup>8</sup>, such as webseries *Psicóticas Inseguras*.

There is little space in open television for the exhibition of content aimed at children. Therefore, the digital platforms that offer VoD are a great showcase and a market where audiences can find this type of content, which in the Chilean case includes from videos of songs to cartoons series produced entirely in the country. This is the case of production company Atiempoestudio, which bet, at the beginning of this decade, for YouTube as the distribution platform for its content. Its biggest success is *El Perro Chocolo*, with 1.4 million subscribers on its YouTube channel in Spanish (atiempo-preescolar), which has versions in other languages: English, with just over 8 thousand subscribers, and Portuguese, with 55 thousand subscribers. The videos include classic children's songs sung by a dog named Chocolo and his farm animal friends, classic stories also told by this character, stories that narrate his adventures and games played through songs. All this audiovisual material is aimed at children from 0 to 4 years old and has been seen more than a billion times on YouTube since 2009.

*Cantando Aprendo a Hablar* is another series directed to a pre-school audience, aimed at stimulating language in children through songs and video clips that are available on a YouTube channel and also on Netflix. With more time on the market (since 1989), in *El Club de Cantando Aprendo a Hablar* four actors represent a group of young friends who – through original songs – explore the language and tell stories that teach children to speak and to do it properly. This initiative of a group of speech therapists, present on YouTube since the beginning of the decade, has 1.2 billion views.

*Puerto de Papel* is an international co-production based in Chile, which is broadcast on open television in Chile, Argentina and Colombia. It is also available on the digital satellite TV platform DirectTV on Demand and on the website of Televisión Nacional de

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<sup>8</sup> The catalog of 80 audiovisual productions of OndaMedia is mainly made up of Chilean films, whose first exhibition was in movie theaters.

Chile, the public channel that broadcasts it. Precisely, the website of the Chilean public channel has a special section, Kids, in which 14 children's programs – half of it cartoons series – can be accessed.

The audiovisual content of TVN available on the web is located within the sections of its website, which has a graphical user interface in which the player is not necessarily the center of attention, as the text, the video descriptions or even other links may have a higher visual hierarchy. This is not the case with Loop 13, which, although it is part of Canal 13 website, has an appealing graphic presentation that encourage to watch the audiovisual work, be it a chapter of a series, a humor program of the 1980s or a reality show. In this platform there is also an offer, although smaller, of productions aimed at children, such as *Diego y Glot*, *Villa Dulce* and *Pulentos*. In both television stations, the model corresponds to AVoD, because, when the webpage is loaded, an advertising screen is displayed and, then, when a video is played, an advertising spot of 30 seconds is loaded, after which the user has access to the chosen content.

It is also interesting to note that VoD public platforms have a considerable catalog of works aimed at children. Thus, OndaMedia has seven serial productions of animated fiction aimed at children, while the video library of the National Television Council has eight. In the latter case, some of them are also in the mentioned television channels, since they are series funded by grants of the Council.

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## COLOMBIA: EMERGING SCENARIO FOR THE PRODUCTION OF FICTION ON DIGITAL PLATFORMS<sup>1</sup>

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### **1. Colombia's audiovisual context in 2017**

The year 2017 marked an outstanding flourishing in audiovisual production for Colombia, particularly in the fields of cinematography and independent production through digital platforms. In this sense, during the year, the appearance of fictions completely made to circulate through social networks or in public and private channels through VoD was seen, with the webseries being one of the most outstanding elements. This in addition to the growth of the film industry in the country and the recording of different film products with the support of personnel and producers of the nation. To this extent, Colombia is shown as an emerging scenario in the production of fiction on digital platforms in multiple formats and with different purposes, since narratives have allowed to maintain certain relationships with television such as to serve as a framework for marketing products, as happens with mini webseries created entirely by industries of different order.

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<sup>1</sup>\* Obitel Colombia team thanks Kantar Ibope Media, because, without the information provided by them, it would not be possible to carry out the analyses presented here.



With regards to the trends, it is necessary to point out the exponential growth that Caracol had in terms of audience compared to its main competitor, RCN, being the leader during the year in rating and achieving, in the case of fiction, the first six places of the top ten. When it comes to genres, entertainment is still the most important, and reality shows have a special place, which is, in fact, the protagonist of prime time. That said, the year 2017 offered, in narrative terms both an upswing of hybridizations between the logic of continuity of the series and certain classic elements of the telenovela, such as an important emphasis on humor as a central element in the productions together with the handling of the biography of artists and national characters as a starting point for the stories to be shown on the small screen and to be replicated on digital platforms.

Colombia's audiovisual context is characterized by the importance private channels have in national life as opinion builders and those who bring together the largest audience. On the other hand, in the case of public channels, although they do not have a high rating, they have evidenced a growing concern for the quality of their production, particularly in regional channels and in the construction of cultural or documentary bets as the central focus of its programming.

On the other hand, the increase of independent producers in the country is noteworthy, which is materialized in webseries and multiple audiovisual products. Also noteworthy is the growth of pay TV in the nation and the use of networks and platforms that have become alternatives for audiovisual consumption. This has generated a broad offer for viewers and, at the same time, a change in the relations between the audience and the product in terms of the use of other logics inherent of digital environments, as well as in the understanding of much faster and more fluid narratives in terms of audiovisual rhythm.

## 1.1. Open TV in Colombia

Open television in Colombia is comprised of five national channels distributed as shown on Chart 1.

**Chart 1. Open national television networks in Colombia**

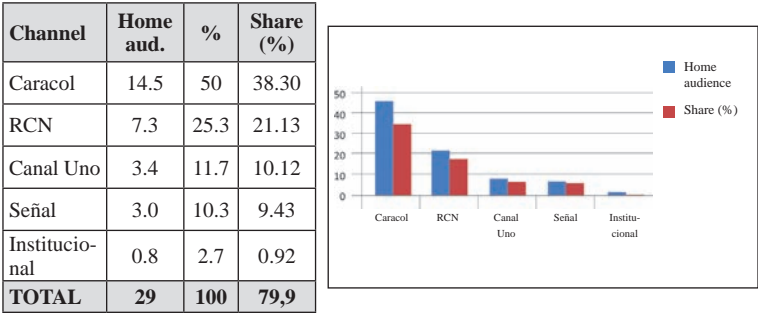
Private networks (3)	Public networks (2)
Caracol	Señal Colombia
RCN	Canal Institucional
Canal Uno	
Total networks = 5	

Source: Obitel Colombia

Private channels, specifically Caracol, obtain the largest audiences nationwide. However, it is necessary to point out the strategic role that Canal Uno starts to acquire when it becomes a new offer after being tendered and awarded in 2017. Likewise, national public channels, primarily Señal Colombia, have begun to work in the positioning of its contents and the possibilities of broadening its audience by framing a commitment to innovation and exploration in terms of genres and formats.

In terms of platforms, all channels have video on demand (VoD) options and, in turn with other content offers that even go through mobile applications. It generates digital environments in which, although there is no full construction of transmedia narratives, a multimedia space around the productions has been achieved and, in a particular way, built fictions to be consumed exclusively by the web surfers which complete a panorama with various offers for viewers through multiple screens.

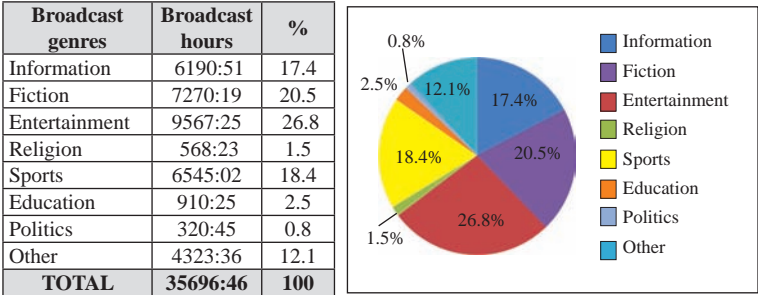
Graph 1. TV rating and share by channel



Source: Obitel Colombia and Kantar Ibope media Colombia

The previous graph shows in an important manner the central role Caracol has in audiences and its high percentage of share. Likewise, it displays a greater recognition of Señal Colombia, approaching the third private channel of the country, and a significant reduction of RCN, which was surpassed very strongly by Caracol.

Graph 2. Genres and hours broadcast on TV



Source: Obitel Colombia and Kantar Ibope Media Colombia

Entertainment is the genre that has the most broadcast hours and at the same time obtains the highest number of audience and a prominent position in prime time. Fiction takes the second place, supported, in large part, for being a companion of the reality shows in the night slot and main protagonist of the afternoons. Sports programs are found in the third place, where the follow-up of national soccer matches is essential, as well as the transmission of interna-

tional matches and even other leagues and competitions, mainly European ones. In fourth place, information programs appear, and the duration of these stand out, particularly the news broadcast at noon. These figures imply the preponderance of entertainment on the small screen as the focus of interest of the national audience.

## **1.2. Audience trends over the year**

In Colombia, there has been a notable growth in the audiovisual offer, in which it is necessary to understand that, along with the five national channels, there are also several regional channels, the alternative of pay television and the existence of various digital platforms that turn, as a whole, into a scenario that makes visible different ways of watching, experiencing and approaching television in the country. Thus, it is necessary to point out that the audience in the nation is in a process of transformation, of change towards different ways of relating to the contents.

Now, in relation to the formats of national television, outside the platforms mentioned above, there is a relevant trend of reality shows consumption, format that has become the most watched and has positioned itself in prime time. Also outstanding are the television series linked to the life of public figures in their majority, as well as the relationship between drama and humor, where Caracol is positioned as the leading channel.

Consequently, the consumer has migrated to new platforms, generating a change in the projection of the current TV consumers and their relationship with the television product. Likewise, Colombian productions display new high-quality elements, as well as of integration, allowing the connection with international channels and new cinematographic creations with productions created by independent producers, such as Dynamo, allowing for the establishment of an emerging industry of independent producers outside of everyday public and private channels. It is therefore an unstoppable technological phenomenon at a general level, with the inclusion of series that are exclusively for web transmission.

### 1.3. Advertising investments of the year: in TV and in fiction

Colombian television has had significant transformations, due to globalization processes, in which different models and platforms have been explored for the construction of television content. Particularly, the fiction genre through series, miniseries and telenovelas has enhanced the construction of narratives with high level of expectation, not allowing viewers to lose sight of the screen. This situation is supported by companies with the purchase of advertising campaigns especially in prime time. The decision to invest in advertising campaigns that circulate through television has its source in the rating reached by the channels in each time slot and the amount of audience that they have.

Thus, the investment, per channel, was: Caracol, USD 1.3 million; RCN, USD 700 thousand; and Canal Uno, USD 150 thousand. From these figures it is possible to affirm that the field of television will possibly continue to grow in the production of fiction in order to guarantee business investment in channels, which ultimately results in the sale of products to viewers and the positioning of brands in the audiences.

### 1.4. Merchandising and social merchandising

In the case of merchandising and social merchandising, it is worth noting that, in the first case, fictions are fully linked in the positioning of some products within the development of the narratives, in a marketing strategy that involves the use of certain brands which are made visible in some shots and frames of the programs. However, as far as the social aspect is concerned, the representation in fiction is minimal and it is reduced to the participation of actors and actresses in strategies such as the *Caminata de la Solidaridad por Colombia* (Walk of Solidarity for Colombia) or *Teletón*.

Thus, social merchandising highlights the central role of the news, which have defined sections for companies such as bank *Bancolombia*, with spaces such as *Bancolombia Más Cerca* and *Gente que le Pone el Alma*, which accounts for the visibility of their prod-

ucts, accompanied by a social work resource or one that highlights community work. These sections appear in the central broadcast of television news in the 2 PM slot. Considering what has been mentioned, other strategies or spaces like *Titanes Caracol* or *Valientes*, on RCN, make ordinary Colombians stand up and participate in these projects and gives them a series of incentives to, on the one hand, demonstrate the social impact of the channels and, on the other, a decrease of up to 125% of the income tax due to the work done in social terms.

This look at the social aspect is complemented by the spaces already mentioned, which are Teletón and Caminata de la Solidaridad por Colombia, two movements that are carried out annually and distribute their funds in various projects aimed at the less fortunate. In the first one, in the case of fictions, actors and actresses from channels Caracol and RCN come together to encourage the audience to contribute with the donation of funds for the disabled population, while in the second they are protagonists of themed floats which refer to each production and are decorated with different elements alluding to the events of each fiction. These drive around the streets of Bogotá accompanied by a real and digital mobilization of citizens and the corresponding donations for social works.

In this context, the last year showed, at the economic level, that Colombians had a greater inclination to support the work of Fundación Solidaridad por Colombia and the efforts of the Caminata, by Teletón, since the second one only reached 73% of the amount of funds that were expected to be collected, while the first one met its projected expectations.

## 1.5. Communication policies

During the year 2017 in Colombia, different laws were established aiming, in general, to improve mobile internet, cloud technology, big data, internet of things (understood as the connectivity of multiple devices in a social environment) and social technologies. These are aspects that seek the use of technologies and their updat-

ing, at the service of the community, to generate assertive communication spaces, taking as a course the advancement of scientific and technological activities, such as research projects and the creation of technologies for the aforementioned purposes.

Additionally, interest was shown in the elaboration and publication of specific regulatory projects within the Ministry of Information and Communication Technologies (MinTIC), which allowed the generation of public policies for indigenous peoples or communities whose access in the country is difficult, taking into account their needs and possibilities of accessing information on the web through strategies such as Vive Digital stations, located in different areas of the country. These are spaces where there is free connection to the network at high speed, with the purpose to bring all the populations to use the internet in a significant manner.

## **1.6. ICT trends**

Colombia is showing significant growth with regard to trends in the use of ICTs, which is evident in the MinTIC report for 2017, which highlights that 72% of Colombian households have access to electronic equipment such as smartphones, 38% to desktops and laptops, and 32% to smartTV. This panorama suggests that internet connectivity in the country has been increasing, and 76% of households have access to a network. In the third quarter of 2017, a total of 28.41 million broadband internet connections were reached, of which 15.8 million were through the subscription modality in fixed and mobile networks and 12.6 million were through mobile connections by demand. Also, the residential use – at 91.2%, compared to corporate use at 8.7% – is the one that stands out the most. These data become indicators that allow us to understand the increase and development of webseries and the increase in demand by users of these in different teams, highlighting that the majority of internet users use 78% of the connectivity for entertainment.

### 1.7. Public TV

The protagonists of public television in Colombia during 2017 in terms of fiction were the regional channels, which begin to become alternatives for the viewers in regions and cities, so that the impulse to make productions for the local sphere stands out, with the inclusion of contextual dynamics and particular voices. Thus, while at the national level the production of hybridizations and transmedia experiments in Señal Colombia is highlighted, in cases like that of some regions there are examples such as Telecaribe, with the production of *La Niña Emilia*, made for the consumption of the audience in the north of the country.

On the other hand, the increase in followers of Señal Colombia through social networks stands out. This media convergence is the materialization of a project that began in 2014, in which the infrastructure has been strengthened, making RTVC portal available to the viewers, where they can access channels and stations with thematic signals, such as RTVC-Play, which offers documentaries and fiction series.

In matters of regulations, the issuance of Resolution 1813/2017 by the National Television Authority (ANTV) modified the consideration system for the service of pay television, so that public television is partly financed by a percentage of the total income generated by each operator. According to the government, these contributions with the new regulation are more equitable considering the convergence, in which the same company of pay television offers cable and internet services, generating more possibility for revenue for the public sector.

### 1.8. Pay TV

When analyzing the trends of subscription television in Colombia, it is possible to note that the country continues to increase the number of subscribers to this type of service, so that there is an increase of 0.23% in 2017 with regards to 2016, which corresponds to 8.26 million households that hire the service, and, along with it,



the presence of 13.83% of piracy, which reveals a deep need in the population to have pay TV, regardless of the mechanisms for access. On the other hand, regarding market share of pay TV providers, according to the number of subscribers they have, the report indicates the following as the top five: Claro (36%), Tigo Une (16%), DirecTV (16%), Telefónica (7%), STV Net (4%) and others (21%).

Future projections of pay TV indicate that, by 2021, subscription TV in Colombia will exceed 9 million subscribers, with a combined annual growth rate of 0.93%. The growth of pay TV in Colombia, consequently, is quite important. However, the data that stands out is the growth and monopoly of Claro.

With regards to what concerns an approach to television subscription trends on digital platforms, it is evident that Colombia has become a growing market, where there are many competitors standing out, such as Claro, Movistar, Netflix and RTVC (Colombian radio television that offers free content in comparison to the other platforms and of national origin). Thus, in 2017 there were audiences of 7 thousand subscribers on RTVC; followed by Claro, with data of 1.2 million subscriptions; and Netflix, with more than half a million subscribers in the country. It allows to see a growing panorama of streaming platforms, which have expanded by 128% in their market in the country.

## **1.9. Independent producers**

It is noteworthy that, in the face of the advance in connectivity, access to the internet and the possibilities of media convergence, large television producers, such as RCN and Caracol, and small producers have positioned themselves in the market, increasing their participation in an important niche among the young and adult population, which comprise 70% of the users who use media such as internet and television for digital platform entertainment. In this consolidation of the market in digital media, platforms such as YouTube stand out, where products like *Entre Panas*, made by the beer industry, have circulated. And, next to it, the production of the great

channels, such as Caracol, which has developed new content like series *Testosterona Pink* and *Pasada de Moda* for its video on demand (VoD) system, has managed to reach specific audiences without the vetoes or controversies that can appear at family hours.

Among the series produced by independent producers, *Colectivo Primíparos* stands out, which presented a production named *El Coste*. Likewise, it is worth highlighting the way in which several companies with a certain international projection have appeared on the national scene and others that even work on the cinematographic stage. This is the case of *Dynamo*, previously mentioned, which makes products with Netflix and has participated in the making of recordings for the Hollywood industry. There are also producers such as *Aurora Films*, *Indiana Films* and others that make content for networks, music videos and small fictions in webseries format, which shows the growing interest in producing content in the country.

## 1.10. International trends

An issue that deserves special attention in the case of Colombia has to do with a fact that could be described and characterized in this way: Colombian television and the national audiovisual sector seems to be increasingly aligned with the trends that dominate the sector internationally, and this translates into the success and recognition not only commercial but also in aspects such as the technical, narrative and characterization of the quality of the product that finally circulates in these environments. This has to do, in our opinion, with the very imaginative way that national production has assimilated and continues to be immersed in that process, the formulas, the possibilities of recreating themes and situations, as well as the narrative resolution of the characterization of situations, characters and plots – all this without renouncing what is proper to the national condition, but bringing it closer, treating it within those extremely flexible and recurrent formats that are inherent to the cinema worldwide, to television with high developments, to the audiovisual tradition that dominates globally.

## 2. Analysis of the year: national and Ibero-American premiere fiction

**Table 1. Fiction broadcast in 2017 (national and imported; premieres and reruns; co-productions)**

<b>PREMIERE NATIONAL TITLES – 17</b>	<b>PREMIERE IMPORTED TITLES – 8</b>
<b>Caracol</b> 1. <i>Tu Voz Estéreo</i> (series) 2. <i>Alias JJ</i> (series) 3. <i>Cuando Vivas Conmigo</i> (telenovela) 4. <i>La Cacica</i> (series) 5. <i>Los Morales</i> (series) 6. <i>Polvo Carnavalero</i> (telenovela) 7. <i>Tarde Lo Conocí</i> (series) 8. <i>Sin Tetras Sí Hay Paraíso</i> (series) 9. <i>La Nocturna</i> (telenovela)  <b>RCN</b> 10. <i>Francisco el Matemático</i> (series) 11. <i>La Ley del Corazón</i> (series) 12. <i>No Olvidaras mi Nombre</i> (series) 13. <i>Venganza</i> (series) 14. <i>Las Vegas</i> (series) 15. <i>Hermanos y Hermanas</i> (series) 16. <i>El Comandante</i> (telenovela) 17. <i>Pamblé</i> (series)	<b>Caracol</b> 1. <i>La Biblia Continua</i> (miniseries – United States) 2. <i>Moisés y los Diez Mandamientos</i> (telenovelas – Brazil) 3. <i>El Chema</i> (series – Mexico) 4. <i>El Señor de los Cielos</i> (Colombia, Mexico, United States)  <b>RCN</b> 5. <i>La Rosa de Guadalupe</i> (series – Mexico) 6. <i>Los Milagros de Jesús</i> (series – Brazil) 7. <i>Paquita la del Barrio</i> (series – Mexico) 8. <i>Raíces</i> (miniseries – United States)  <b>RERUNS – 3</b> <b>RCN</b> 1. <i>La Pola</i> (telenovela) 2. <i>Ecomoda</i> (telenovela) 3. <i>Los Reyes</i> (telenovela)  <b>TOTAL PREMIERE TITLES: 25</b> <b>TOTAL RERUN TITLES: 3</b> <b>TOTAL TITLES BROADCAST: 28</b>

Source: Obitel Colombia

In Table 1 we can see the way in which, during this year, in terms of television fiction, the series is imposed with regards to the telenovela, both in national and imported productions.

**Table 2. Premiere fiction in 2017: countries of origin**

Country	Ti- tles	%	Chap- ters/ epi- sodes	%	Hours	%
<b>NATIONAL (total)</b>	<b>17</b>	<b>77.3</b>	<b>1397</b>	<b>70.0</b>	<b>1047:45:00</b>	<b>70.0</b>
<b>OBITEL COUNTRIES (total)</b>	<b>4</b>	<b>18.2</b>	<b>414</b>	<b>20.8</b>	<b>310:30:00</b>	<b>20.8</b>
Argentina	0	0.0	0	0.0	0:00:00	0.0
Brazil	0	0.0	0	0.0	0:00:00	0.0
Chile	0	0.0	0	0.0	0:00:00	0.0
<b>Colombia</b>	<b>17</b>	<b>77.3</b>	<b>1397</b>	<b>70.0</b>	<b>1047:45:00</b>	<b>70.0</b>
Ecuador	0	0.0	0	0.0	0:00:00	0.0
Spain	0	0.0	0	0.0	0:00:00	0.0
USA (Hispanic production)	0	0.0	0	0.0	0:00:00	0.0
Mexico	4	18.2	0	0.0	0:00:00	0.0
Peru	0	0.0	0	0.0	0:00:00	0.0
Portugal	0	0.0	0	0.0	0:00:00	0.0
Uruguay	0	0.0	0	0.0	0:00:00	0.0
Venezuela	0	0.0	0	0.0	0:00:00	0.0
<b>CO-PRODUCTIONS (total)</b>	<b>1</b>	<b>4.5</b>	<b>184</b>	<b>9.2</b>	<b>138:00:00</b>	<b>9.2</b>
Colombian co-productions	1	0.0	184	0.0	0:00:00	0.0
Co-productions between Obitel countries	0	0.0	0	0.0	0:00:00	0.0
<b>TOTAL</b>	<b>22</b>	<b>100.0</b>	<b>1995</b>	<b>100.0</b>	<b>1496:15:00</b>	<b>100.0</b>

Source: Obitel Colombia

In the premiere fictions for 2017, national productions stand out, although there were four Mexican premieres and only one co-production between Colombia, Mexico and the United States.

In 2017, premieres of national and Ibero-American fictions were mostly broadcast in prime time, with only the premiere of some productions in the afternoon slot. There were no premieres in other time slots.

Table 3. Chapters/episodes and hours broadcast by time slot

Time slot	National				Ibero-American				Total			
	C/E	%	H	%	C/E	%	H	%	C/E	%	H	%
Morning (6:00-12:00)	0	0.0	0:00:00	0.0	0	0.0	0:00:00	0.0	0	0.0	0:00:00	0.0
Afternoon (12:00-19:00)	220	15.7	165:00:00	15.7	582	97.3	436:30:00	97.3	802	40.2	601:30:00	40.2
Prime time (19:00-23:00)	1177	84.3	882:45:00	84.3	16	2.7	12:00:00	2.7	1193	59.8	894:45:00	59.8
Night (23:00-6:00)	0	0.0	0:00:00	0.0	0	0.0	0:00:00	0.0	0	0.0	0:00:00	0.0
Total	1397	100.0	1047:45:00	100.0	598	100.0	448:30:00	100.0	1995	100.0	1496:15:00	100.0

Source: Obitel Colombia

Table 4. Formats of national and Ibero-American fiction

Format	National						Ibero-American					
	Titles	%	C/E	%	H	%	Titles	%	C/E	%	H	%
Telenovela	7	41.2	538	38.5	403:30:00	38.5	1	20.0	16	2.7	12:00:00	2.7
Series	10	58.8	859	61.5	644:15:00	61.5	4	80.0	582	97.3	436:30:00	97.3
Miniseries	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0	0:00:00	0.0
Telefilm	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0	0:00:00	0.0
Unitary	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0	0:00:00	0.0
Docudrama	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0	0:00:00	0.0
Others (soap opera, etc.)	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0	0:00:00	0.0
Total	17	100.0	1397	100.0	1047:45:00	100.0	5	100.0	598	100.0	448:30:00	100.0

Source: Obitel Colombia

With regard to formats of national and Ibero-American fictions in 2017, there was only the presence of telenovelas and series, the latter format having the most number of premieres.

**Table 5. Formats of national fiction by time slot**

Format	Morn- ing	%	After- noon	%	Prime time	%	Night	%	To- tal	%
<b>Telenovela</b>	0	0.0	0	0.0	7	43.8	0	0.0	7	41.2
<b>Series</b>	0	0.0	1	100.0	9	56.3	0	0.0	10	58.8
<b>Miniseries</b>	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
<b>Telefilm</b>	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
<b>Unitary</b>	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
<b>Docudrama</b>	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
<b>Others (soap opera, etc.)</b>	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
<b>Total</b>	<b>0</b>	<b>0.0</b>	<b>1</b>	<b>100.0</b>	<b>16</b>	<b>100.0</b>	<b>0</b>	<b>0.0</b>	<b>17</b>	<b>100.0</b>

Source: Obitel Colombia

National fictions, both series and telenovelas, were shown mostly in prime time, and only one of the series was broadcast in the afternoon.

**Table 6. Time period of national fiction**

Time	Titles	%
<b>Present</b>	11	64.7
<b>Period</b>	3	17.6
<b>Historical</b>	0	0.0
<b>Others</b>	3	17.6
<b>Total</b>	<b>17</b>	<b>100.0</b>

Source: Obitel Colombia

As for the time period of national productions, most are stories that recreate the present time (11 of 17), three are period fiction, and the other three correspond to biographical narratives, or biopic.

**Table 7. The ten most watched titles**

	Title	Country of origin of idea or script	Channel	Format/genre	N. of chapters / episodes (in 2017)	Time slot	Rating	Share
1	<i>Tarde lo Conocí</i>	Colombia	Caracol	Series	75	Prime time	12.21	36.16
2	<i>Los Morales</i>	Colombia	Caracol	Series	74	Prime time	12.11	25.53
3	<i>Sin Tetas Sí Hay Paraíso</i>	Colombia	Caracol	Series	88	Prime time	11.12	39.34
4	<i>Cuando Vivas Conmigo</i>	Colombia	Caracol	Telenovela	67	Prime time	9.87	32.6
5	<i>La Nocturna</i>	Colombia	Caracol	Telenovela	105	Prime time	9.09	32.19
6	<i>Polvo Carnavalero</i>	Colombia	Caracol	Telenovela	90	Prime time	8.77	26.24
7	<i>La Ley del Corazón</i>	Colombia	RCN	Series	111	Prime time	8.3	24.7
8	<i>Alias JJ</i>	Colombia	Caracol	Series	60	Prime time	7.69	28.8
9	<i>La Cacica</i>	Colombia	Caracol	Series	30	Prime time	7.07	26.33
10	<i>Las Vegas</i>	Colombia	RCN	Series	20	Prime time	6.17	20.34
<b>Total productions: 10</b>				<b>Foreign scripts: 0</b>				
100%				0%				

Source: Obitel Colombia and Kantar Ibope Media Colombia

In 2017, the ten most viewed titles correspond in their entirety to national productions, in series and telenovela formats. As for the channels, eight of the ten titles are from Caracol and were all broadcast in prime time.

**Table 8. Audience profile of the ten most watched titles: gender, age, socioeconomic status**

	Title	Channel	Gender %		Socioeconomic status %		
			Women	Men	High	Medium	Low
1	<i>Tarde lo Conocí</i>	Caracol	15.3	10.0	36.2	39.7	26.1
2	<i>Los Morales</i>	Caracol	14.5	9.8	27.3	35.1	40.9
3	<i>Sin Tetas Sí Hay Paraíso</i>	Caracol/	13.2	9.9	29.9	39.0	48.8
4	<i>Cuando Vivas Conmigo</i>	Caracol/	12.5	8.5	30.3	34.6	40.7

5	<i>La Nocturna</i>	Caracol	11.1	7.8	31.0	34.9	36.4
6	<i>Polvo Carnavalero</i>	Caracol	10.5	7.8	24.4	29.1	31.3
7	<i>La Ley del Corazón</i>	RCN	10.7	6.3	27.0	28.3	27.1
8	<i>Alias JJ</i>	Caracol	8.6	7.9	20.4	28.4	36.2
9	<i>La Cacica</i>	Caracol	9.0	5.9	24.3	28.7	30.8
10	<i>Las Vegas</i>	RCN	7.4	5.1	15.8	21.6	25.1

	Title	Channel	Age group %				
			4-11	12-17	18-24	25-39	40+
1	<i>Tarde lo Conocí</i>	Caracol	8.4	15.5	15.2	19.0	34.8
2	<i>Los Morales</i>	Caracol	11.2	20.9	21.5	19.8	29.1
3	<i>Sin Tetas Sí Hay Paraíso</i>	Caracol/	7.5	19.6	16.9	21.5	27.0
4	<i>Cuando Vivas Conmigo</i>	Caracol/	5.0	14.1	10.9	15.5	29.2
5	<i>La Nocturna</i>	Caracol	5.9	11.3	15.1	1.4	24.3
6	<i>Polvo Carnavalero</i>	Caracol	5.9	12.5	12.4	15.3	23.3
7	<i>La Ley del Corazón</i>	RCN	6.2	15.7	14.1	13.3	20.5
8	<i>Alias JJ</i>	Caracol	4.0	9.6	11.2	13.7	20.3
9	<i>La Cacica</i>	Caracol	4.2	7.2	8.8	11.0	21.0
10	<i>Las Vegas</i>	RCN	5.1	11.6	9.1	9.4	0.0

Source: Obitel Colombia and Kantar Ibope Media Colombia

With regards to the profile of the audience of the ten most viewed titles, the female audience has higher rating percentages than the male. The age groups with the highest rating points are 12-17 and 18-24 years old. However, in the two productions with the highest rating, the age range 25-39 years presents outstanding audience. With respect to socioeconomic levels, in the segment of lowest resources, the audience tends to be higher.

### 3. Transmedia reception

In the scenario of the Colombian media ecosystem, it is still difficult to talk about transmedia reception, perhaps because, although there is a presence of television fiction in spaces like the web, the idea of transmedia productions has not been materialized yet, which limits the presence of narratives (regardless of the format) on the websites of the channels or producers and social networks and to a scarce interaction with the audiences beyond the possibility of visualizing the chapters produced and making some comments through social networks.



The fact that the productions are not thought and made as trans-media, considering the characteristics of this type of narrative, consequently, means that the reception and interaction of the audiences cannot be considered as transmedia, but rather as the use of networks to learn about the chapters and interact in a passive relationship from the audience, and not from real possibilities of interaction with the productions and intervention of their narratives.

Thus, a space of importance in the case of fictions is that of social networks, especially Facebook, which is the network most consumed by Colombians. Now, it is important to note that most fictions do not have their own fan page or profile adjusted for each production, nevertheless they post photos, videos, advertisements and announcements on channel profiles, sharing environment with other productions, except in the case of the news, which have their own profiles. However, compared to some productions and given their impact on the public, it is the audience that creates profiles with the name and content related to the fictions, where the same type of interactions is present.

Amid this panorama, it should be noted that independent sectors continue to create productions that obey the transmediation, although not as television fiction, but as a transmedia documentary, which perhaps, due to its lower production cost, becomes a good launch platform. An example of this is *Pasión: Otra Cara de Colombia*, a transmedia universe that aims to show the reality of the Colombian farmers, specifically from the Antioquia department, and the way in which they are affected by the country's internal conflict. The idea of this transmedia product starts by offering a look at daily life, social problems, the role of women and community leadership.

This project was carried out by five young individuals with different professions who looked for donations to finance the production through the web on different websites, where they talked about the project, how it was developed, and offered "compensations" such as acknowledgments in the closing credits, digital cards, invitations to screenings and launch, posters, gift vouchers, among others. An exercise distant from the sponsorship of major channels,

as has already happened with several transmedia initiatives, which are woven more from the independent sector than as an initiative of major channels.

In terms of resources and elements, the transmedia universe of *Pasión: Otra Cara de Colombia* is made up of a documentary film that shows the life of a farm steward, who is also a recognized community leader. Along with this, there is a webseries that narrates stories that take place in the school of the village. This is accompanied by a photographic and illustration exhibition that shows different aspects of daily life. Likewise, the universe is complemented by a digital book for children and a web documentary about the role of women in the village. Finally, the transmedia has a website where the progress of the project was reported and in which transmedia information and its social networks are now compiled: Facebook, Twitter, Vimeo, YouTube and Instagram.

It is important to highlight that the reception of this project does not represent a high index since, as it is an independent production, it does not have the support of different media for its promotion and dissemination, which significantly reduces the audience to a sector of the population restricted to particular interests of an aesthetic or academic nature and who are the main consumers of contents different to the fictional ones, those that are usually found on television channels or on commercial cinema screens, which continue to cover the majority of the audience in the country.

#### **4. Highlights of the year**

The highlight of the year, along with the preponderance of the series and the presence of a certain narrative hybridization in the most watched telenovelas in the country, in terms of offering visual and script resources close to the cinematographic (which is narrative agility), and the seriality rather than the classic structures of the telenovela, is the preponderance of two fundamental elements for most of the top viewed fictions: managing the life of a character in national public life as a thematic axis and to include humor as a cen-

tral element and a particular formula to tell stories and thus generate a fresh and dynamic style for what is narrated on the screen.

In this way, fictions such as *Tarde lo Conocí*, *Los Morales* and *Alias JJ* offered clear biographical elements, recreating the facts of the life of vallenato folklore singers and, strangely, one of Pablo Escobar's most famous lieutenants. Thus, based on real events, these became an important narrative focus for identification with the audience, from the closeness and intimacy offered, not only the portrait of the characters, but the representation of daily life. Additionally, two fictions – *Cuando Vivas Conmigo* and *Sin Tetas Sí Hay Paraíso* – are based on literary works: the first in *El Héroe Discreto*, by Vargas Llosa, and the second in the homonymous work of Gustavo Bolívar.

However, the use of humor deserves special attention, since, in all the most viewed fictions, especially in *Polvo Carnavaleiro* and *Las Vegas* – except for *La Ley del Corazón*, worked more in the scheme of drama and police –, resorting to laughter, parody and the appearance of funny characters or situations imprinted a different narrative rhythm to both the scripts and the visual proposals of the productions. Thus, one could think of a possibility to make fiction visible as an opportunity to laugh at the problems life brings, either with characters specifically created to trigger comic actions or directly with the use of events with a certain degree of absurdity, which combines the frantic rhythm of the narrative with touches of humor clearly designed within the narrative of fiction.

With regards to the narrative themes, consequently, we must highlight the fact that all fictions share the life of a real character as the central theme of fictional construction, not only to portray the biography of real people, but because it offers a combination of vicissitudes that its protagonists must face. Thus, in the most viewed fictions, narratively speaking, one passes from jealousy to love, from adventure to calm, from success to failure, seeking to reflect in each production the fragments, the multidimensionality and thematic diversity of life itself. And perhaps for that very reason

comedy is such an important element, to be able to laugh at the difficulties or paradoxes that living implies.

When it comes to social issues, it is worth highlighting, in the ten most viewed fictions, the fact of the essential value it fulfills, in most of them being the combination of family and personal improvement as two definitive elements that usually accompany one another. This corresponds not only to the story of the success of vallenato singers and the connections between that success and their family dynamics, but also, in cases such as *La Nocturna*, showing the panorama of those who study at night to achieve dreams. To a lesser extent, drug trafficking and the judicial environment appear on *Sin Tetas Sí Hay Paraíso*, *Alias JJ* and *Ley del Corazón*, which, as a trend in other times of Colombian television, focuses on scenarios close to narcoculture or police court environments and their various intrigues, although with a high dose of melodramatic components in all cases.

Hence, the tendency in Colombia is then to seek in audiovisual production both a reflection and a mechanism of distension in face of the problems of daily life, over continuing the proliferation of drug trafficking narratives and, rather, in the excess of biographical stories, accompanied by products in which drama lives with humor, the party, the saturated and exuberant color palette, which allows someone to smile in the middle of the sadness and that not only evidences the result of a certain technical concern, but also the idea that, at least from their narratives, the country is moving towards a kind of joy driven by comedy, in which life itself can be converted even with its ever present contingency.

## **5. Theme of the year: TV fiction on video on demand platforms**

The theme of the year for this occasion – Colombian television fiction on digital platforms – corresponds, in our opinion, to global trends of what we could call the audiovisual communication sector and the way in which these are specifically affecting regions such as Ibero-America, determining, in turn, to a large extent, the character-

istic reality of this sector, whose transformations, dynamics and, in general, development are directly reflected in people's daily lives, in the changes at the level of cultural consumption, leisure and entertainment linked to the small screen and the new entertainment options that are increasingly available in these new or very recent digital platforms, which are no strangers, at least in the case of Colombia, to the greater economic capacity of the people in terms of being able to access such platforms. Of these aspects we will be giving account in what comes next.

As is sufficiently recognized, the increasing technological-communicative mediation of social and cultural processes expands in proportion to the consolidation of what is called the current digital revolution; the digitalization of the totality of the processes and dynamics that run through contemporary societies and that have transformed even the very concept of development in connection with the network (Castells and Himanen, 2015). This expansion, fast and transversal to the social structure, with an economic and productive impact, linked to phenomena such as permanent innovation and creativity put at the service of constant discoveries and digital creations in the form of applications and all other series of resources that are made available to society as a whole, is leading the main changes in the lives of people, as well as their ways of doing, thinking, accompanying, using leisure time, entertainment; consuming, in the broad sense of the term, and living together in cyberculture formations (Levy, 2008) and even in new bets that are as disturbing as they are amazing, as is the case with swarms (Han, 2015). This is evidenced by the preponderance in the country of the use of smartphones, the increasing penetration of pay television and the high consumption and presence on social networks, which leads to at least 70% of the national population having some mechanism to access the network and digital content.

Within this framework, the increasingly strategic positioning of audiovisual communication is clearly recognized and, in particular, the area of entertainment is the guiding principle of this trend. In

other words, in terms of digitization, the audiovisual content is the most consumed, and within them, in the same way as on the small screen, entertainment is the protagonist. This repositioning, mediated by the audiovisual device, film, television, video and, in general, by the infinite multiplication of applications in all the screens available for social and cultural interaction and for the new spaces and scenarios of coexistence and consumption in a kind of realization of a global screen (Lipovetsky, 2014), all these factors are, in broad strokes, responsible for what we are calling as revolution or digital change, with all the implications that this statement has to deal with to capture the essence of the current social, material and cultural change.

However, because of its global nature, and because of the predominant place that, in the field of economy, the production and assimilation or integration of the cultural to these models of use and appropriation of the digital occupy, as a fundamental instance for the current life of the societies, the so-called mass media – or cinema, television and other existing media – are today competing to feedback, to converge technologically and symbolically in what would be called digital platforms. We understand digital platforms as the new audiovisual technological spaces where the various components of information and communication converge, feedback and transform themselves mutually and severally, in order to mediate from these integrating devices the totality of people's lives. And we must highlight the central importance acquired by the new audiovisual formats, genres, languages, models and styles put at the service of the demand and current cultural consumption. This situation, as shown below, is reflected and clearly affects what happens in this sector in the 21st century in Colombia.

In connection with what was previously said, it is feasible to affirm that, in Colombia, one of the most dynamic sectors, and, therefore, with the greatest capacity for presence and influence in national events, is the telecommunications sector, in the broad sense of the word, which is not alien to the impact of digitalization in the

country, a latent issue at the institutional level, with the implementation of Vive Digital plan to guarantee the presence of broadband in the nation, mobile telephony coverage in 4G of at least 80% of the national territory and the already mentioned increasing offer of pay TV and the consumption of smartphones, which reaches 70% of the inhabitants. With this, it is clear that Colombia fits neatly into the horizon of changes of a global nature and, in particular, assimilates the series of macro trends that are transforming contemporary societies from the so-called digital revolution. In short, we could say: Colombia is increasingly a society determined by the mediatization and digitalization of life and aimed at capturing a greater boom and a greater impact of the audiovisual sphere as a strategic place to redefine and resize the essence of the social, political, cultural, with which we are going through in this century. A brief outline of the basic changes that make these transformations possible is presented below.

Thus, first and in historical terms, after many failed initiatives, not exempt from lack of agreement and political will, of clarity and comprehension of the importance of cinema for the culture of a society, in 2003 the Law of the Cinema n. 814 was passed, expanded by Law n. 1556/2012 (about economic benefits to film in Colombia). Thanks to them, this sector of audiovisual production emerges as something promising, capable of delivering great satisfaction and recognition to the country internationally, which is demonstrated with the recognition of productions such as *El Abrazo de la Serpiente* and *La Tierra y la Sombra* at a national level, as well as with production of international cinematographic products such as *Los 33* or *American Made*, and with recorded productions for television and digital platforms such as *Narcos*, *Sitiados* and other series.

The continuous achievements and distinctions achieved by various productions, and the dissemination both internally and externally of these achievements in the different audiovisual digital platforms, show the realism of this initiative and the need in the country to advance the strengthening of the national film industry.

It is noteworthy that, in these platforms, the transit between the cinema, television, video and other spaces of consumption, recreation and entertainment is becoming more agile and feasible according to the expansion of the networks.

National television, whose model of organization rests fundamentally on the privatization of the audiovisual spectrum and its commercial exploitation in the hands of the large private producers, had, in the awarding of the third channel – Canal Uno –, an expression of the validity of the small screen as one of the main sources of popular taste and entertainment, in the measure of the modernization and material, technological, technical and financial growth of these companies to reinforce the quality of their productions and multiply the possibilities of reaching audiences with the use of new digital platforms. As noted in this chapter, pay television had a remarkable growth in recent years in the country and became a solid alternative for the access of a large part of the population.

The high penetration rate of the internet, based on the growth of broadband in the nation and the implementation of plans such as Vive Digital, which aims to have a coverage of digital services throughout the nation, as well as the multiplication of the offer of subscription to various platforms and digitized services, such as Gobierno en Línea (Online Government) and other services, has contributed significantly to the expansion of this process of digitization of life and national culture. This, in turn, continues promoting the trend towards the implementation of forms, models and styles of global audiovisual consumption, which has an impact on the development of the national audiovisual industry in terms of production, implementation of partnerships with foreign producers and implementation and strengthening of digital media platforms from both local and international media, such as Caracol Play, Fox App, HBO Go, Netflix and others.

Without a doubt, and as a logical consequence of the changes registered in the different aspects mentioned, the validity and growth of television fiction in the main digital platforms with pres-



ence in the country are evident, which is revealed by the agreements between Netflix and Caracol allowing to watch all the products of the Colombian channel in the international platform, the realization of series for Fox, such as *Sitiados*, and also in small independent or alternative platforms that strive to attract greater audiences based on a varied offer and a competition that implies greater quality, diversity and creativity. Innovation in this sector is highly dynamic and the ability to respond to this challenge depends to a great extent on the subsistence of the various players present in the sector. Among the digital platforms with presence in the country, we can mention: those linked to the large private television channels such as Caracol and RCN and also to the main cable television operators Claro and Movistar; global platforms such as Netflix, Fox, YouTube, Facebook, HBO; and small independent or alternative platforms present on YouTube or other large platforms and generally linked to local, community, minority and small-scale producers.

This large digitized spectrum is where, in the country, television fiction is currently circulating both premieres and reruns, unlike what used to happen quite recently, no more than five years ago, when this fiction had as an epicenter almost exclusively national television. Thus, in the multiple digital platforms, chapters of new products that appear on national television can be seen, as well as exclusive productions for web, such as *Estado Civil*, *Las 13*, *Superpoderosas*, among others, and products in rerun as *San Tropel*, *Galilito Ramirez*, *Pedro el Escamoso* and other fictions.

In the described framework we consider it necessary to rescue – as something essential for the understanding of the current television fiction in the digital field – the own transformations that are perceived in relation not only with the audiences, but also with regards to the narratives, production and even distribution of audiovisual products on these digital platforms. That is why the television audiences keep up, although without losing the propensity to very fast or agile change, depending on the offer they want to receive from the companies that dominate the sector. This is the case of the

broad domain that Caracol has offered during the last few years as opposed to RCN and other media, thanks to its use of the series format, which hybridizes with the telenovela and other resources that go through narration, treatment, language and the capacity of technological recreation, converting the format in the absolute winner.

Likewise, this is reflected in the change at the level of the ways of narratively sharing and integrating the social and cultural phenomena that capture the attention of the audience, where, without any problem, the imaginary and the symbolic are integrated to the real, and the sensation is created, the imaginary is fed back, allowing people to make the television program compatible with their daily space, without disregarding the problems that surround it.

The recursive nature of the context and the formats available in the new conditions of digital audiovisual mediation allows large, medium or small, institutional, independent or alternative, community producers to use that variety of resources and formats to recreate and communicate those aspects, elements or messages that contribute to the setting of a certain situation. Everything fits there, everything is possible, including the extremes; the merit or the narrative, media, technological success lies in knowing how to integrate, set, recreate those extremes – which are not different from the tensions that affect the daily reality of the great national majorities. This is a country planning to overcome the conflict, but surrounded by very high figures of insecurity, crime, corruption, and equally sheltered by a kind of dream, fusion, collective utopia through which a symbolic redemption is sought, a kind of atonement, collective catharsis that contributes to cope with what is unpleasant, inadmissible. This is how issues like Colombia are positioned in the World Cup in Russia: the people who stand out for their solidarity and innovation, the friends who celebrate over any eventuality. In this manner, the functional synthesis of the economic, productive, psychological, social audiovisual is successful because it portrays moments, instants, chains, events in which characters of fiction and reality intervene indiscriminately in a healthy, peaceful coexistence, and this is very

likely to result in a highly plausible degree. This narrative enclave, consequently, is the formula for the most successful webseries and products, such as *Entre Panas*, which, to position a product such as beer, uses a humorous narrative, full of situations that highlight the ability to cope with life's problems with the help of friends and a good drink.

The aforementioned clearly affects the renewal and strengthening of the capacity shown today by national producers, not only the big producers, but also the independent ones, in that kind of frenzied competition that exists to position the one that, in terms of audiovisual narration, of fictional recreation of life, feels different, novel, striking and is directed to have admirers, consumers, not only in the country, but in the main spaces, including Hollywood, as shown by recent information from the sector and the increasingly constant realization of films, series and large productions in the country.

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## MEXICO: A GREAT MARKET FOR NETFLIX, LITTLE INNOVATION IN NATIONAL FICTION AND FEW OPPORTUNITIES FOR TRANSMEDIA

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### 1. Mexico's audiovisual context in 2017

In 2017, Mexican television continued experiencing significant changes. The most important was that Emilio Azcárraga Jean stepped down as Televisa CEO after the crisis generated by a decline in rating; a negative tendency that has accompanied the network since 2008. The two media events with the highest rating on Mexican television were the presidential message issued after the terrible earthquake the country suffered on September 19, 2017, and the boxing match between Mexicans Saúl “El Canelo” Álvarez and Julio César Chávez Jr. The government message was aired by Televisa’s channel Las Estrellas, with an average rating per household of 22.69, while the boxing match aired by Azteca 7 obtained 21.95 by the same measurements. None of these broadcasts had more than 23 rating points per household. A decade ago in Mexico, the highest ratings ranged between 31 and 33 points, according to data revealed by Nielsen Ibope Mexico and collected by this fiction observatory since the year 2008.

In view of this panorama, the networks have sought to maintain the rating they still have by replicating proven formulas, that is, fictions, reality shows or competition shows that ensure profitability with the audience. And this is repeated throughout the year

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<sup>1</sup> We thank Nielsen Ibope Mexico, for providing the information about audiences and programming necessary for this chapter. The opinions about them are under Obitel’s responsibility.

with minor changes, for example: *La Voz México* and *La Voz Kids* (Televisa); *Master Chef Mexico* and *Master Chef Junior* (TV Azteca). The former is a musical contest and the two latter are cooking contests; in both cases, the networks that produce them first launch the adult version and, later on, the children’s version; the production format and scheme are identical in both of them.

This strategy is followed by many other TV networks in Latin America that have done the same, showing nothing but a readjustment of the traditional offer instead of actual competitiveness on the basis of thematic creativity in formats. This allows them to survive with more of the same, without making an effort in developing, for example, a new model of fiction, as Televisa has done historically and just like Spanish public television has done in recent years with series such as *El Ministerio del Tiempo* or *La Casa de Papel*.

One of the few innovations in terms of production arrived by the hand of TV Azteca, which presented sport reality show *Exatlón Mexico*, which became one of its shows with the highest rating. This success was repeated after the renewal of magazine *Enamorándonos*. Both shows ranked among the most viewed in Mexico during 2017 and they marked a tendency as the most viewed TV shows on YouTube.

The year 2017 was also marked because young audiences consolidated their fiction viewing this year on *video on demand* platforms and the TV networks experimented by posting their own productions, unlike what happens worldwide.

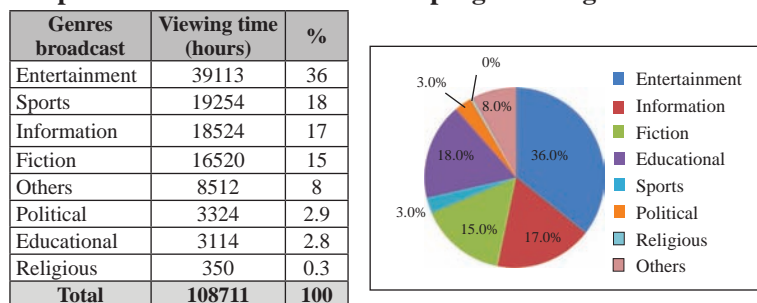
1.1. Open television in Mexico

Chart 1. National open television networks in Mexico

Private networks (6)	Public networks (3)
Televisa (channels 2, 5 and 9)	Once TV (channel 11)
TV Azteca (channels 1 and 7)	Conaculta (channel 22)
Imagen TV (channel 3)	Una voz con todos (channel 14)
TOTAL NETWORKS = 9	

Despite the announcements that the Federal Telecommunications Institute in 2017 would grant a license for Mexico to have a fourth nationwide television network, this never happened. Then, the number of television networks in the country continues to be nine.

**Graph 2<sup>2</sup>. Genres broadcast on TV programming**



Source: Obitel Mexico

Regarding national open television in Mexico, 86% of all the general programming concentrates in genres such as entertainment, sports, information and fiction. It should be pointed out that, in 2017, information shows and political debate shows grew in about one thousand hours compared to 2016, due to the fact that the country's presidential elections were very close in time, which were celebrated in Mexico on July 1, 2018.

## 1.2. Audience trends in 2017

Mexico represents the third largest market in the world (IAB, 2017) for the main video on demand (VoD) platforms. In Mexico, consumption of this type of contents occupies a privileged place in reception practices, since internet users dedicate an average of 18 hours a month to watch contents, programs and/or films on websites and platforms that provide free or paid services (PwC, 2017).

<sup>2</sup> Graph 1 this year was not made due to lack of information.

The audiences that prefer or choose this type of digital services the most often are young people whose ages range between 15 and 24 years. They consume 40% of the total time of VoD in Mexico; and, among them, women are the most active (IAB, 2018).

According to the study on Media Consumption and Devices among Mexican Cybernauts conducted by IAB México (2017), Mexican cybernauts prefer to watch videos on the internet between 6 PM and 12 AM. The main contents viewed are music videos, films, TV series, tutorials, the news and videos/content generated by other users, mainly those generated by the so-called youtubers. The free platforms with the greatest consumption are YouTube and Facebook, while the paid services with the most visitors are Netflix, Claro Video, iTunes, Cinopolis Klic, Vimeo and Blim (IAB, 2017).

### **1.3. Advertising investments of the year: in TV and in fiction**

The news that shook the advertising market in Mexico was that the largest advertising investment was not, as it had been historically, in TV networks but in the internet. According to consulting firm PwC (2017), in 2017, this sector enjoyed an increase of 17% in its profits, reaching 1.282 million dollars. That amount surpassed what the two main Mexican networks, Televisa and TV Azteca, reported as advertising profit, since they combined earned 1.174 million dollars in 2017.

### **1.4. Merchandising and social merchandising**

The merchandising strategies within TV fiction did not present great variations, and commercial products, especially beauty and household articles, maintained their presence at the visual and narrative levels.

As to social merchandising, the unusual interest in focusing many of the fictional stories on subjects connected with the procurement of justice stood out. In fact, there were two telenovelas that focused on this social issue: *La Fiscal de Hierro* and *Nada Personal*, both by TV Azteca. In the former a woman stands against the cor-

ruption present in the Mexican justice system, while *Nada Personal* (a remake of the successful telenovela aired in 1996) sought to show the opposition against corruption present in the highest echelons of politics. In 2018, Televisa launched a telenovela entitled *Por Amar Sin Ley*, whose story turns around a law firm that quickly solves legal problems, such as custody for gay parents, murder of women, self-defense homicide, thus exposing the new Accusatorial Penal Justice System that came into effect in Mexico in 2016 and gave rise to oral proceedings.

In the realm of VoD fiction, similar productions stand out, such as *Ingobernable*, produced by controversial actress Kate del Castillo and aired by Netflix. It portrays the struggle of the first lady against the corruption of the Mexican political system in collusion with drug dealers.

## **1.5. Communication policies**

This year was fraught with legal modifications that had an impact on modification of the Mexican media ecosystem; the first was that the Federal Telecommunications Institute distributed a total of 32 open digital TV channels in 29 areas in the country. These new concessions were granted to 13 companies, among which: Telsusa Televisión México, a company linked with the “tsar” of Central American television, Ángel Remigio González, who operates 45 TV stations and 72 radio stations in 15 Latin American countries.

It is good news that on November 17, 2017, the Nation’s Supreme Court of Justice issued a resolution to regulate expenses on social communication made by the governments, since, in their opinion, lack of regulation in official publicity had a silencing effect on the media and it was a direct restriction of freedom of expression. Between 2013 and 2016, President Enrique Peña Nieto’s administration spent 36,261,000,000 pesos in official publicity (2 billion dollars), 15,161 million pesos more than what was authorized by the Chamber of Deputies for this period (Aroche, 2017).



## 1.6. Public TV

During 2017, public TV had a moderate “resurgence” precisely through the production and broadcast of fiction on their screens. Historically, TV fiction as a programming genre had been left out of Mexican public TV screens. Until just six years ago, Once TV, the first Mexican and Latin American public channel, created in 1958, started producing series with an ever greater impact on the audiences. For example, *Bienes Raíces*, *XY* or *Quiero Ser tu Fan*, whose innovation has been mainly thematic, set themselves clearly apart from the subject matters of the traditional telenovela of commercial TV. Recently Once TV (of the Instituto Politécnico Nacional) produced and aired two great series: *Paramédicos* and *Juana Inés*. The latter was bought by Netflix and it is being distributed internationally. This is an example that shows that the quality of Mexican public TV fiction is of the highest level. Side by side, public TV in Mexico has become stronger with the creation this year (2017) of the Asociación Mexicana de Productoras y Televisoras Universitarias (Amptu, The Mexican Association of University TV Networks and Production Companies), which stands out from the other so-called “public” televisions that are totally dependent on the state governments, since they aim to accomplish a mission that is more one of public rather than governmental service and their goal is also to innovate formats and programming, precisely including fiction.

## 1.7. Pay TV

In his 2017 annual balance, television critic Álvaro Cueva (2017) shows that, despite the fact that a significant progress in pay TV has not been evident, it has attained several achievements and the number of its subscribers has increased, at once diversifying its services in its subscription packages, for example, by including cell phone services. The progress made by pay TV among Mexican audiences has been due to, on one hand, the fact that its cost has dropped as a result of business competition among the existing companies and, on the other hand, the diversification of its programming and in

particular the “mexicanization” of many of the shows it has offered. For example: *Shark Tank México*, *Top Chef México* and *La Sopa*. At the same time, as Cueva underscores, more and more Mexican actors and actresses appear on their shows, which makes the perception of nearness between them and the national viewership increase.

## **1.8. ICT trends**

Mexico is the second largest business market for telecommunications and broadcasting in Latin America, only second to Brazil. In 2017, for example, this sector obtained profits for 22.8 billion dollars (PwC, 2017). One of its main appeals lies in the total number of people who can have access to not only the traditional media but also to the “new” communication platforms. In Mexico, a country with 120 million inhabitants, at least 63% (70 million Mexicans, approximately) are internet users, while the radio and open television audiences reach 86% of the population, that is, 103 million (Ifetel, 2017).

In 2017, internet access grew 9% in Mexico, when it went from 65 million in 2016 to 71 million people with access to the net. However, this access continues to be focused on urban areas, since, according to the National Survey on Availability and Use of Information Technologies in the Households (Inegi, 2017), only four of every ten people living in rural areas access this technology versus seven of every ten who access it in the cities.

Besides, according to this survey, the Mexicans who use the internet do so from a smartphone, a desktop computer, a laptop computer or tablet. However, more than 40 million Mexicans continue to be without internet access.

## **1.9. Independent production companies**

As to independent fiction production in Mexico, this is something that does not happen in national open television, but in *video on demand* systems. In 2017, for example, production company Argos produced *Ingobernable* and Alazraki Comunicación aired the third season of *Club de Cuervos*.

1.10. International trends

Regarding international trends, the purchase of Turkish telenovelas continues to be a constant. These telenovelas are still being aired both by TV Azteca and Imagen Televisión. Something that is also worth pointing out is the fact that the presence of Korean series is becoming more and more common. These shows have managed to appeal to Mexican audiences by dealing with youthful themes, and they have been so successful that Televisa’s telenovela *Mi Marido Tiene Familia* was based on Korean drama *My Husband Got a Family*, created by Park Ji-eun and broadcast by KBS 2TV in 2012.

2. Analysis of the year: national and Ibero-American premiere fiction

Table 1. Fiction broadcast in 2017  
(national and imported; premieres and reruns)

PREMIERE NATIONAL TITLES: 29	PREMIERE IMPORTED TITLES: 27
<b>Televisa: 18 national titles</b> 1. <i>Mi Adorable Maldición</i> (telenovela) 2. <i>El Bien Amado</i> (telenovela) 3. <i>La Doble Vida de Estela Carrillo</i> (telenovela) 4. <i>Enamorándome de Ramón</i> (telenovela) 5. <i>Mi Marido Tiene Familia</i> (telenovela) 6. <i>El Vuelo de la Victoria</i> (telenovela) 7. <i>En Tierras Salvajes</i> (telenovela) 8. <i>Hoy Voy a Cambiar</i> (series) 9. <i>Caer en Tentación</i> (telenovela) 10. <i>Papá a Toda Madre</i> (telenovela) 11. <i>Me Declaro Culpable</i> (telenovela) 12. <i>Sin tu Mirada</i> (telenovela) 13. <i>Los Vecinos</i> (series) 14. <i>Renta Congelada</i> (series) 15. <i>Dogma</i> (series) 16. <i>Nosotros los Guapos</i> (series) 17. <i>40 y 20</i> (series) 18. <i>La Rosa de Guadalupe</i> (unitary)	<b>Televisa: 8 imported titles</b> 1. <i>Sin Senos Sí Hay Paraíso</i> (series – Colombia, USA) 2. <i>La Fan</i> (telenovela – USA) 3. <i>El Señor de los Cielos 4</i> (series – USA) 4. <i>La Doña</i> (telenovela – USA) 5. <i>Señora Acero 3</i> (series – USA) 6. <i>La Querida del Centauro</i> (series – USA) 7. <i>La Traición</i> (telenovela – Colombia) 8. <i>El Rico y Lázaro</i> (telenovela – Brazil)  <b>TV Azteca: 4 imported titles</b> 9. <i>Kuzey Güney</i> (telenovela – Turkey) 10. <i>Maral</i> (telenovela – Turkey) 11. <i>Soy Luna</i> (series – USA) 12. <i>Violetta</i> (telenovela – Argentina)  <b>Canal Once: 3 imported titles</b> 13. <i>Mr. Selfridge</i> (series – England) 14. <i>Downton Abbey</i> (series – England) 15. <i>Vikings</i> (series – Ireland, Canadá)  <b>Imagen TV: 8 imported titles</b> 16. <i>La Sultana Kosem</i> (telenovela – Turkey)

<p><b>TV Azteca: 5 national titles</b></p> <p>20. <i>La Fiscal de Hierro</i> (telenovela)</p> <p>21. <i>Nada Personal</i> (telenovela)</p> <p>22. <i>Las Malcriadas</i> (telenovela)</p> <p>23. <i>La Hija Pródiga</i> (telenovela)</p> <p>24. <i>Tres Familias</i> (telenovela)</p> <p><b>Co-production: 1 title</b></p> <p>25. <i>Dos Lagos</i> (series – Mexico, USA)</p> <p><b>Canal Once: 2 national titles</b></p> <p>26. <i>Yo Soy, Yo 2</i> (series)</p> <p>27. <i>Paramédicos 3</i> (series)</p> <p><b>Imagen TV: 2 national titles</b></p> <p>28. <i>Paquita la del Barrio</i> (series)</p> <p>29. <i>Muy Padres</i> (telenovela)</p>	<p>17. <i>El Clon</i> (telenovela – Brazil)</p> <p>18. <i>Elif</i> (series – Turkey)</p> <p>19. <i>Me Robó la Vida</i> (series – Turkey)</p> <p>20. <i>Una Parte de Mí</i> (series – Turkey)</p> <p>21. <i>Mi Último Deseo</i> (series – Turkey)</p> <p>22. <i>La Esclava Madre</i> (telenovela – Brazil)</p> <p>23. <i>Las Reglas del Juego</i> (telenovela – Brazil)</p> <p><b>Canal 22: 4 imported titles</b></p> <p>24. <i>Catalina La Grande</i> (series – Russia)</p> <p>25. <i>Bailando al Límite</i> (series – England)</p> <p>26. <i>Bandolero</i> (series – Spain)</p> <p>27. <i>Caravaggio</i> (series – Italy)</p> <p><b>RERUN TITLES: 7</b></p> <p><b>Televisa: 4 titles</b></p> <p>28. <i>Familia P.Luche</i> (series)</p> <p>29. <i>Lo que la Vida me Robó</i> (telenovela)</p> <p>30. <i>Corazón Indomable</i> (telenovela)</p> <p>31. <i>Tres Veces Ana</i> (telenovela)</p> <p><b>TV Azteca: 2 titles</b></p> <p>32. <i>Cuando Seas Mía</i> (telenovela)</p> <p>33. <i>Hasta que te Conocí</i> (series)</p> <p><b>Canal Once: 1 title</b></p> <p>34. <i>Crónica de Castas</i> (series)</p> <p><b>TOTAL PREMIERE TITLES BROADCAST: 56</b></p> <p><b>TOTAL RERUN TITLES: 7</b></p>
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Source: Obitel Mexico

In 2017 there was more equality between the number of national and Ibero-American fictions that were aired on Mexican television. This is the result of the establishment of Imagen Televisión as a new fiction production company, which, in its first full year on the air, managed to produce two original titles. The fictions that are imported in Mexico mainly come from the United States, Brazil and Colombia.

**Table 2. Premiere fiction in 2017: countries of origin**

Country	Title	%	Chapters/ episodes	%	Hours	%
<b>NATIONAL (total)</b>	<b>29</b>	<b>51.0</b>	<b>2004</b>	<b>45.0</b>	<b>1629:00</b>	<b>42.0</b>
<b>OBITEL COUNTRIES (total)</b>	<b>27</b>	<b>49.0</b>	<b>2380</b>	<b>55.0</b>	<b>2214:00</b>	<b>58.0</b>
Argentina	1	2.4	75	2.1	71:00	2.9
Brazil	4	9.7	663	18.9	635:00	21.0
Chile	0	0	0	0	0:00	0
Colombia	3	11.1	293	12.3	248:00	11.2
Ecuador	0	0.0	0	0.0	0:00	0.0
Spain	1	2.4	25	0.7	21:00	0.7
USA (Hispanic production)	5	12.2	479	13.6	442:00	14.9
Mexico	27	66.0	1912	53.9	1545:00	52.16
Peru	0	0.0	0	0.0	0:00	0.0
Portugal	0	0.0	0	0.0	0:00	0.0
Uruguay	0	0.0	0	0.0	0:00	0.0
Venezuela	0	0.0	0	0.0	0:00	0.0
<b>TOTAL</b>	<b>56</b>	<b>100.0</b>	<b>4384</b>	<b>100.0</b>	<b>3843:00</b>	<b>100.0</b>
National co-productions						
Co-productions between Obitel countries	2		92		74:00	

Source: Made by Obitel Mexico

The production of national fiction, since 2011, has not managed to produce more than 30 titles a year. In 2017, the production was 29 titles, and two of them were co-productions. As to Ibero-American titles, 27 titles were broadcast, and 14 of these belong to the Obitel scope. The USA and Brazil are the countries from which the most telenovelas and series are imported. From outside the Obitel scope, seven Turkish fictions were aired in Mexico. The two co-productions broadcast in 2017 were made between Mexico and the United States: *La Piloto*, aired by Televisa, and *Dos Lagos*, by TV Azteca.

The prime time and night slot continued to be the favorite ones for broadcasting both national and Ibero-American fiction. In 2017, morning viewing of fiction was abandoned altogether, leaving this TV space for reruns of series or classical telenovelas. In 2017, seven telenovelas were rerun.

Table 3. Chapters/episodes and hours broadcast by time slot

Time slot	National			Ibero-American			Total		
	C/E	%	H	%	C/E	H	%	C/E	H
Morning (6:00-12:00)	0	0.0	0:00	0.0	0	0:00	0.0	0	0:00
Afternoon (12:00-19:00)	493	24.6	405:00	24.8	1113	1057:00	47.7	1606	1462:00
Prime time (19:00-22:00)	1454	72.6	1181:00	72.4	289	263:00	11.9	1743	1444:00
Night (22:00-24:00)	57	2.8	43:00	2.9	978	894:00	40.4	1035	937:00
Total	2004	100	1629:00	100	2380	2214:00	100	4384	3843:00

Source: Made by Obitel Mexico

Table 4. Formats of national and Ibero-American fiction

Format	National				Ibero-American			
	Titles	%	C/E	H	Titles	%	C/E	H
Telenovela	17	58.7	1552	1245:00	10	37.0	1295	1190:00
Series	11	37.9	300	232:0	17	63.0	1085	1024:00
Miniseries	0	0.0	0	0:00	0	0.0	0	0:00
Telefilm	0	0.0	0	0:00	0	0.0	0	0:00
Unitary	1	3.4	0	0:00	0	0.0	0	0:00
Docudrama	0	0.0	152	152:00	0	0.0	0	0:00
Others (soap pera, etc.)	0	0.0	0	0:00	0	0.0	0	0:00
Total	29	100	2004	1629:00	27	100	2380	2214:00

Source: Made by Obitel Mexico

The growth in series production remained with respect to past years. In the case of national fiction, 11 series were produced and 17 titles were exported. Most of the foreign series broadcast come from the United States, Turkey and Spain.

**Table 5. Formats of national fiction by time slot**

Formats	Morn- ing	%	After- noon	%	Prime time	%	Night	%	To- tal	%
Telenovela	0	0.0	3	60.0	14	70.0	0	0.0	17	58.6
Series	0	0.0	1	20.0	6	30.0	4	100.0	11	37.9
Miniseries	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Telefilm	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Unitary	0	0.0	1	20.0	0	0.0	0	0.0	1	3.5
Docudrama	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Others (soap opera, etc.)	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
<b>Total</b>	<b>0</b>	<b>0.0</b>	<b>5</b>	<b>100</b>	<b>20</b>	<b>100</b>	<b>4</b>	<b>100</b>	<b>29</b>	<b>100</b>

Source: Made by Obitel Mexico

The favorite time to broadcast fiction, both telenovela and series, is the prime time, which spans from 7 PM to 10 PM in México. It should be noted that this year *La Rosa de Guadalupe* (Televisa) aired its 1000th chapter, which has been broadcast in Mexico on a daily basis with growing success since 2008.

**Table 6. Time period of national fiction**

Time period	Titles	%
Present	28	92,0
Period	-	-
Historical	-	-
Others	2	8,0
<b>Total</b>	<b>29</b>	<b>100,0</b>

Source: Made by Obitel Mexico

During 2017, the only fiction that played with narrative temporality was *Caer en Tentación* (Televisa), which used connections between the past and the present to shape the plot of the story focused on infidelity. Another series that was based on the past was *Hoy Voy*

a *Cambiar*, an autobiographical series about Mexican singer Lupita D'Alessio.

**Table 7. The ten most watched in 2017: origin, rating, share<sup>3</sup>**

	Title	Country of original idea or script	Channel	Format/genre	N. of chap./ep.	Time slot	Rating (%)	Share (%)
1	<i>Hoy Voy a Cambiar</i>	Mexico	Channel 2	Biographical	21	Prime time	16.2	24.5
2	<i>Mi Marido Tiene Familia</i>	Korea	Channel 2	Comedy	101	Prime time	15.5	23.9
3	<i>Enamorándome de Ramón</i>	Venezuela	Channel 2	Comedy	116	Prime time	15.5	26.5
4	<i>La Rosa de Guadalupe</i>	Mexico	Channel 2	Drama	152	Afternoon	14.7	26.6
5	<i>La Doble Vida de Estela Carrillo</i>	Mexico	Channel 2	Drama	72	Prime time	14.4	21.9
6	<i>La Piloto</i>	USA	Channel 2	Drama	80	Prime time	14.2	21.7
7	<i>El Bienamado</i>	Brazil	Channel 2	Comedy	96	Prime time	13.5	21.5
8	<i>En Tierras Salvajes</i>	Mexico	Channel 2	Drama	69	Prime time	13.1	21.5
9	<i>Mi Adorable Maldición</i>	Colombia	Channel 2	Drama	121	Afternoon	13.0	26.1
10	<i>Papá a Toda Madre</i>	Mexico	Channel 2	Comedy	102	Prime time	12.5	19.2
Total national scripts: 5						Foreign scripts: 5		
50%						50%		

Source: Made by Obitel with data provided by Nielsen Ibope Mexico. Base of TV Audience 5 Domains; MSS TV, Rat%, Shr%; 1/1/2017-31/12/2017, total households.

The tendency in 2017 was the production of fictions with proved success in other countries. Hence, six of the ten most viewed titles have foreign scripts; of these, the case of *Mi Marido Tiene*

<sup>3</sup> Share in households has duplicity and, when it is added up, the result does not equal 100%. This is due to the fact that there may be more than one TV set on at a household.



*Familia* must be highlighted since it was an adaptation of a Korean fiction: : | 넝쿨째 굴러온 당신 (*My Husband Got a Family*), created by Park Ji-eun and aired by KBS 2TV in 2012.

Autobiographical series also reappear as successful broadcasts. In 2016, the most viewed fiction was *Por Siempre Joan Sebastian*, which portrayed the life of the homonymous singer. This year, the second most viewed fiction was the one portraying the life of controversial singer Lupita D'Alessio.

According to an analysis that the Obitel team makes from knowing which were the ten most viewed fictions in Mexico (according to the average rating and share per household), comedy has been ranking among the favorite genres for Mexican audience. In 2017, four of the ten most viewed fictions belong to this genre.

**Table 7a. The ten most watched national titles in 2017:  
origin, rating, share**

Title		Country of original idea or script	Channel	Format/genre	N. of chap./ep.	Time slot	Rating	Share
1	<i>Hoy Voy a Cambiar</i>	Mexico	Channel 2	Bio-graphical	21	Prime time	16.2	24.5
4	<i>La Rosa de Guadalupe</i>	Mexico	Channel 2	Drama	152	Afternoon	14.7	26.6
5	<i>La Doble Vida de Estela Carrillo</i>	Mexico	Channel 2	Drama	72	Prime time	14.4	21.9
8	<i>En Tierras Salvajes</i>	Mexico	Channel 2	Drama	69	Prime time	13.1	21.5
10	<i>Papá a Toda Madre</i>	Mexico	Channel 2	Comedy	102	Prime time	12.5	19.2
12	<i>Me Declaro Culpable</i>	Mexico	Channel 2	Drama	61	Prime time	12.2	19.6

13	<i>Caer en Tentación</i>	Mexico	Channel 2	Drama	102	Prime time	12.1	18.8
16	<i>Sin tu Mirada</i>	Mexico	Channel 2	Drama	111	Prime time	9.1	19.1
18	<i>Como Dice el Dicho</i>	Mexico	Channel 2	Drama	65	After-noon	11.5	23.1
25	<i>Paquita la del Barrio</i>	Mexico	Channel 3	Drama	74	Prime time	4.2	6.8

Source: Made by Obitel with data provided by Nielsen Ibope Mexico. Base of TV Audience 5 Domains; MSS TV, Rat%, Shr%; 1/1/2017-31/12/2017, total households.

When the top ten is expanded to national titles, it is possible to note that other genres are included in the list, such as Televisa's unitary *Como Dice el Dicho*, but also Imagen TV's series that narrated the life of Mexican singer Paquita la del Barrio.

**Table 8. Audience profile of the ten most watched titles: gender, age, socioeconomic level (% people rating)**

Title		Channel	Gender %		Socio-economic level %			
			Women	Men	ABC+	C	D+	DE
1	<i>Hoy Voy a Cambiar</i>	Channel 2	8.6	4.4	4.8	6.1	6.8	8.9
2	<i>Mi Marido Tiene Familia</i>	Channel 2	8.8	4.4	4.1	5.8	7.1	9.5
3	<i>Enamorándome de Ramón</i>	Channel 2	8.4	4.2	3.4	5.5	7.3	9.2
4	<i>La Rosa de Guadalupe</i>	Channel 2	7.9	4.0	3.1	4.5	7.0	9.1
5	<i>La Doble Vida de Estela Carrillo</i>	Channel 2	7.9	4.0	4.2	4.9	6.8	7.7
6	<i>La Piloto</i>	Channel 2	7.6	4.4	3.9	6.0	6.5	8.2
7	<i>El Bienamado</i>	Channel 2	7.4	3.7	3.7	4.4	6.3	7.7
8	<i>En Tierras Salvajes</i>	Channel 2	7.1	3.4	3.2	4.1	5.9	7.9
9	<i>Mi Adorable Maldición</i>	Channel 2	7.1	3.3	2.9	4.1	6.1	7.7
10	<i>Papá a Toda Madre</i>	Channel 2	6.9	3.5	3.0	4.1	6.5	6.9

	Title	Channel	Age group %				
			4-12	13-18	19-29	30-44	45+
1	<i>Hoy Voy a Cambiar</i>	Channel 2	5.7	5.5	5.6	6.0	8.7
2	<i>Mi Marido Tiene Familia</i>	Channel 2	6.7	6.2	5.3	5.6	8.4
3	<i>Enamorándome de Ramón</i>	Channel 2	6.8	5.6	4.9	5.6	8.1
4	<i>La Rosa de Guadalupe</i>	Channel 2	6.5	5.6	4.5	5.4	7.4
5	<i>La Doble Vida de Estela Carrillo</i>	Channel 2	6.0	4.7	4.7	5.7	7.6
6	<i>La Piloto</i>	Channel 2	6.2	5.9	5.0	5.6	7.2
7	<i>El Bienamado</i>	Channel 2	5.8	4.3	4.4	5.1	7.3
8	<i>En Tierras Salvajes</i>	Channel 2	5.1	4.4	4.0	4.3	7.4
9	<i>Mi Adorable Maldición</i>	Channel 2	5.8	5.0	4.2	4.8	6.1
10	<i>Papá a Toda Madre</i>	Channel 2	5.1	5.0	3.9	4.6	6.9

Source: Nielsen Ibope Mexico. Base of TV Audience 5 Domains; MSS TV, Rat%, Shr%; 1/1/2017-31/12/2017. People targets with visits in the households: total people, men, women, by age range (4-12, 13-18, 19-29, 30-44, 45+) and SEL (ABC+, C, D+, DE).

Like in past years, the audience profile of TV fiction in Mexico continues to be very similar: women over 40 years, of the middle and lower middle class. It is also confirmed that in 2017 the young audiences distanced themselves from viewing fiction on the TV set; however, viewing rates of fiction on VoD platforms of titles such as *La Rosa de Guadalupe* are very high, since the YouTube channel onto which these chapters are uploaded has over 100 thousand subscribers.





### 3. Transmedia reception

This year we reviewed the social networks of the main fictions produced in 2017 (networks with the highest rating in private TV networks and on Netflix, as well as one of the most famous influencers).

Private TV networks do not seem to be interested in continuing or implementing a transmedia strategy and when they have done so (Televisa), it has not worked for them. One case that proved otherwise is *Club de Cuervos*, which we analyzed in more detail last year: the series is on its fourth and last season. It is the current Mexican fiction with the largest number of followers on the social networks, and with the greatest fan participation (its page has over 600 thousand followers); they have even created products with the Club's

brand, memes, they share videos, etc. No doubt, *Club de Cuervos* represents the only fiction with a transmedia approach in Mexico, although we believe that the audience does not yet participate as content generator, as it happens with products from Brazil, Spain and the USA.

Televisa did not continue with its transmedia strategy as it had been announced in 2012 (when it produced *Te Presento a Valentín*); or as they had done with *Lo que la Vida me Robó* (2013) and *Antes Muerta que Lichita* (2015). The only thing Televisa implements beyond the fiction are social networks sites, not to expand the stories that it produces, but to publicize the product, as well as to measure and learn about the audience's preferences. Participation here is also very poor. Despite the above, the production with the most participation in terms of viewing and contents to be shared is *La Rosa de Guadalupe*, which amasses a total of 957 million views on its YouTube channel. Some of its episodes have over 20 million views; therefore, the actual viewership of each episode is greater than what is shown by the rating. In turn, TV Azteca continues to be rather grey in its participation on social networks, and the prime time telenovela that they produced in 2017, *Las Malcriadas*, came and went almost unnoticed also on the social networks. This company has not implemented a transmedia strategy, as it seemed it would at the launching of webseries *Amor a Ciegas* (2014). In turn, the new network, Imagen TV, broadcast *Paquita la del Barrio*, which had over 4 million views on YouTube (videos uploaded by fans), but it had virtually no strategy on the social networks. The so-called influencers or youtubers are a headache for the networks because they reach millions of views for their contents and there is no doubt that young audiences follow them and the networks do not how to attract back that sector.

Fiction on TV networks/ VoD					Offer
Fiction	Facebook	Twitter	YouTube	Instagram	Production offer
<i>La Rosa de Guadalupe</i> (Televisa)	1,090,000	2,861	2,046,899 subscribers. (957,380,899 <sup>4</sup> views since July 2015)	-	They share chapters; news.
<i>Enamorándome de Ramón</i> (Televisa)	69,404	2,289	-	40,400	Interviews of artists; photos; trailers of episodes; live transmissions with the stars, news about the telenovela; a call to vote for the actors for the <i>TV y Novelas</i> awards.
<i>Hoy voy a Cambiar</i> (Televisa's series mayor rating)	18,797	1,916	-	822	News, interviews, photo gallery, details of the production; presents for the audience; chats; calls to obtain the awards.
<i>Las Malcriadas</i> (TV Azteca, series-telenovela)	9,586	26,200	-	4,633	Chapters; photo gallery; favorite characters.
<i>Paquita la del Barrio</i> (Imagen TV)	18,366	-	-	-	They promote Imagen TV's content.
<i>Club de Cuervos</i> (Netflix)	1,609,749	301,000	-	87,133	Promotional pieces; gallery; advice.
Influencer "Badabun" (badabun.tv)	18,086,057	97,000	11,122,770 subscribers (2,801,341,732 views since October 2014)	-	Miscellaneous content; solidarity for social causes.

Source: Made by the authors with data taken from the official pages

<sup>4</sup> Retrieved on April 8, 2018 from <https://www.youtube.com/channel/UCGs30k8Mve-MERD3askAgNYA/about>

### Type of audience participation

Fiction /VoD	Type of audience participation	Fans on the social networks
<i>La Rosa de Guadalupe</i>	“likes”; sharing episodes; comments; memes; sale of products.	Facebook: 455,504 YouTube: 359,648,891 (views first 200 unofficial videos)
<i>Enamorándome de Ramón</i>	“Likes”; comments; downloading photos; sharing videos.	Facebook (1,000)
<i>Hoy Voy a Cambiar</i>	Comments; participation in contests; sharing photos and videos.	Instagram (11 followers)
<i>Las Malcriadas</i>	“Likes”; comments; sharing content; photo gallery.	Facebook (2,735 followers)
<i>Paquita la del Barrio</i>	“Likes”; comments; sharing content.	4,154,871 (views).
<i>Club de Cuervos</i>	Memes; comments; “likes”; creation of products with the brand Cuervos;	Facebook: 674,992 fans
Influencer “Badabun” <i>Atrapando Infieles</i> (episodes)	“Likes”; comments.	Apocryphal sites; app with content; <i>Atrapando Infieles</i> 30,644,429 views.

Source: Made by the authors

## 4. Highlights of the year

The tragedy of the earthquake that occurred on September 19, 2017, which affected above all areas of Mexico City and the neighboring states located in the center of the country, gave rise to the greatest “fictionalization” that has ever been experienced by Mexican television and audiences. The case that motivated this unprecedented televised event, known as the “rescue of #FridaSofía”, was the TV construction of a victim and the many attempts to rescue her from under the rubbles of what had been her school, whose building had collapsed almost entirely during the quake.

The reporters did not only create Frida Sofía, but also – with the help of the viewers – she became the “favorite” victim of the earthquake and of the rescue efforts. This happened because, in view of a catastrophe like the one we experienced, the mass media and their journalists had to make decisions, and these, of course, were not easy

to make because no victim should be more important than the rest. However, not all of them received the same visibility or the same amount of airtime. The media chose, from among an endless number of victims' painful personal stories, those that they considered the most shocking and that would give them the most profit, both in terms of rating and in user traffic on their websites. In this sense, the story of a girl who was trapped under the rubble of her school was peculiarly "appealing". In fact, the story of school Enrique Rébsamen was remarkable enough since before the appearance or creation of Frida Sofía, because it concentrated, as an institution, the greatest effects of the quake. Rescue teams worked tirelessly amid the debris trying to determine whether there were any survivors in the ruins. Rescue technology, especially human heat sensors under the rubble, reveal whether there is anyone alive in a given place. Even though this is inaccurate data, it caused imagination to fly and talk started about a child and from there the story began to take shape until the victim's gender was defined: a girl was born then and she was christened Frida Sofía.

The viewers had to give Frida Sofía life and credit on their minds and their feelings from the TV coverage of her possible existence, which resulted in an unprecedented case, where verisimilitude between fiction and reality is not only given by the story but also by the viewers' credulity. Quite a case to follow given the continued attention paid by the Mexican public for 43 hours in front of the TV screen or on the social networks, following the rescue of "non-existent" Frida Sofía.

The other important event with a nationwide impact and huge transcendence for Mexico and its democratic communication system has been the step back in the promulgation and then in the defense of the audiences' "rights to communication". These rights were promulgated during 2016 by Ifetel, the maximum communications authority in Mexico. These rights were impugned by the Senator Chamber in its October 27, 2017 session and at present they are suspended, waiting to be resolved. Above all, this is about the fact

that the mass media should respect ethical codes in their operations and that there must be an audiences' ombudsman.

The counterproposal that the Mexican commercial TV networks (Televisa and TV Azteca) have been considering is for each media company to formulate their own ethical code and thus decide whether they should appoint an audiences' ombudsman or not, which means that these audiences' rights will be left at the mercy of the media companies' free will. Then, they, and not the audiences, will have the right to decide one way or the other. The Ifetel proposal regarding communication rights is at a standstill. And rights such as providing the public information that explicitly distinguishes facts from opinion, for example, could be eliminated with the stroke of a pen in 2018, once the impugnation process has finished and its elimination is ruled – above all in view of the reality of a period of national political elections that the country will live in the first semester of 2018.

## **5. Theme of the tear: TV fiction on video on demand platforms**

Contents via streaming, particularly in the modality of SVoD (subscription video on demand) broadcast on different platforms, have captured the audiences. As the ratings fall on open TV and the companies seek ways to recapture the audience, the contents provided via VoD became the kings of fiction.

Netflix arrived in Mexico on September 12, 2011, offering contents such as series, documentaries and films at a reasonable price. It had been founded in 1997 and, in 1999, it started to provide services based on subscriptions. Ten years later, it had over 100 thousand titles on DVD and 10 million subscribers worldwide. In 2013 Netflix was the leader in SVoD, with 1.4 million subscribers (Orozco et al., 2014: 361). In 2015 it began to resent competition, since it went from being the SVoD leader with 96.8 % to just 65%. That was due to the appearance of Claro Video, (Carlos Slim's Grupo Carso), which offered the cheapest service (69 pesos a month, equivalent to 4 dollars) and a free month to its clients (Telmex/Telcel). Dish



Móvil also appeared, as an online free service for Dish's subscribers (owned by MVS Comunicaciones). In this context, Televisa launched Veo Tele in 2013 (open TV contents and some pay TV content) and Veo Play (series and films at a monthly subscription of 99 pesos, or 5.5 dollars).

By 2015, Netflix already dominated the Mexican market, with 55.7% of the total number of subscribers, followed by Claro Video, which owned 39.7%. Why did Claro Video grow so much in one year? Because of their market strategy: Telmex offered, along with its internet branch Prodigy, the most reasonable broadband service if its subscribers chose to join Claro Video (Orozco, 2016: 378), offering to provide free services in the first year.

This way, the telecommunications giants (Grupo Carso and Televisa) found strategies to gain subscribers and compete with Netflix. Claro Video changed its services and chose a hybrid model by offering contents by subscription, rental and sale. In addition, it provides Crackle services (Sony Entertainment) and HBO and Fox series. In turn, in 2016 Televisa launched Blim, a service at a cost of 109 pesos (6 dollars) that mainly provides their own productions (it includes a wide catalog of telenovelas, series and films). Like its competitors, it also provides package services for its cable (Izzi) and satellite television (Sky) clients.

Another company that is providing this type of content is Cinépolis Clic, owned by Cinépolis, of Organización Ramírez, which has hundreds of movie theaters and is the major film movie theater chain in the country, and the fourth largest Cineplex chain worldwide.<sup>5</sup> The contents can be bought, rented or exchanged for points. One of its added values is that it offers films that have just been released. In addition to the platforms mentioned above, in Mexico it is now possible to access the contents provided by Amazon Prime (by paying an annual fee of 899 pesos or 49 dollars) and Hulu.

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<sup>5</sup> Retrieved on April 5, 2018 from <https://intranet.cinepolis.com/SitePages/Historia.aspx>

VoD platforms accounted for 10.1% of the total incomes of audiovisual subscription services, according to a 2016 report by The Competitive Intelligence Unit., which also points out that OTT (*over-the-top*) platforms reached 6.7 million subscribers in less than five years, while cable and satellite TV companies only reached that figure in 15 years. In 2017, the number of subscribers grew to 7.4 million (12 times the number of previous five years).

In 2016 Mexico was the second most important market for Netflix worldwide. It hogs 45.5 % of the subscribers in Latin America (Forbes, 2016 cited in Orozco et al., 2017: 294). In view of its success, Netflix decided to produce for the first time a fiction series outside the USA and in Spanish: *Club de Cuervos*.

Netflix is achieving what no other TV network has managed to attain in Mexico: it has become not only the player of other companies' productions, but also the creator of its own contents. Netflix is producing original content, with actors and directors who have been successful. The audience has enjoyed *Club de Cuervos* a great deal and the fourth and last season will be released in 2018. According to data revealed in The Global Television Demand Report (2018)<sup>6</sup>, this series ranks second among all the contents provided by Netflix in Mexico, as to average daily demand expressions, with a total number of 29,959,942 expressions. The report points out that these figures represent the total viewership expressed about some content in a country on a platform. They correspond to a specific country and they do not allow comparing one country to another.<sup>7</sup> According to the same report, the series that obtained the most expressions is *Stranger Things*. On the list of the 20 fictions with the most demand expressions, we found four series in Spanish: *Club de*

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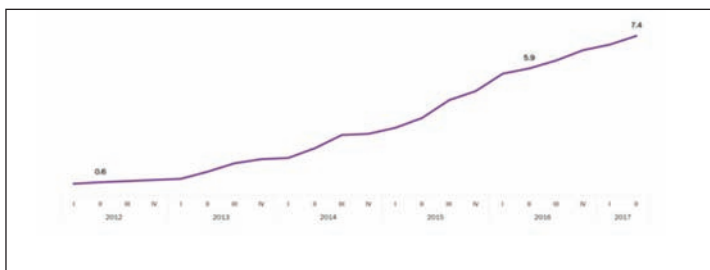
<sup>6</sup> See full report on <https://insights.parrotanalytics.com/hubfs/Resources/whitepapers/Parrot%20Analytics%20-%20The%20Global%20TV%20Demand%20Report%202017.pdf?hsCtaTracking=b8addac1-22bc-483c-a4f8-4044c6f9854f%7C90ace449-b950-48c3-8b36-d801ad65b0cb>

<sup>7</sup> For more information, see <https://support.parrotanalytics.com/hc/en-us/articles/222663987-What-are-Demand-Expressions->

*Cuervos* (Mexico), *Las Chicas del Cable* (Spain), *Narcos* (Colombia) and *Ingobernable* (Mexico).

The following graph shows how the number of SVoD subscriptions has increased in Mexico from 2012 to 2017. This is a very significant increase considering how recently SVoD arrived.

### Increase of subscriptions to SVoD platforms in Mexico



Source: The Competitive Intelligence Unit (Camargo, 2017)

In 2018, Netflix will launch a new series: *La Casa de las Flores*, with 13 episodes. It marks the return of Verónica Castro to fiction, an actress that had not starred in one since 2009. In addition, a bioseries about the life of singer Luis Miguel will be released. On the other hand, Apple is getting ready to compete with Netflix, while Disney's VoD platform will arrive in 2019. It will offer its classics, in addition to Pixar's, but it will also have new content.

Televisa is the one that plays the most fiction content (series and telenovelas). On Blim it provides a large number of materials, which it has produced over almost six decades. It cannot be denied that it has been a great telenovela producer worldwide and it has more than enough materials to fill its catalog on Blim. Blim's offer is actually different from that of Netflix and Claro Video and it could hardly compete with one of them because so far its proposal is a different one. On the other hand, Netflix has produced only two original series in Mexico: *Club de Cuervos* (released in 2015) and *Ingobernable* (2017), starring Kate del Castillo; the second season is

being prepared. The average daily demand expressions indicate that these are the two Mexican series with the most demand expressions of the 20 series with the most indicators. The rest of the Mexican series and telenovelas played on Netflix were produced by Argos Televisión, an independent production company headed by Epigmenio Ibarra. So far Netflix has few fictions (series, telenovelas) produced in Mexico. The majority of the Spanish language series come from Spain, Colombia and the United States (*Chapo*, *Narco*, *La Reina del Sur* and *Velvet*, among others). We only find one bioseries and one telenovela on Claro Video; the former was produced by Imagen TV (the third private network in Mexico) and the other by Argos. Argos has become the most important independent series and telenovela production company for private TV networks and SVoD enterprises.

### Mexican fiction productions (telenovelas and series) on the main SVoD platforms

Netflix (SVoD)	Claro Video (hybrid model)	Blim (SVoD)
<i>Ingobernable</i> (Netflix original) <i>Club de Cuervos</i> (Netflix original) <i>El Chapo</i> (Netflix original) <i>Las Aparicio</i> (Argos) <i>Infames</i> (Argos) <i>El Chema</i> (Argos) <i>Mariposa de Barrio</i> (Telémundo) <i>Luis Miguel</i> (original, bioseries) (2018)	<i>Paquita la del Barrio</i> (Imagen TV, bioseries) <i>El Sexo Débil</i> (Argos)	<i>Los Héroes del Norte</i> (Adicta Films) <i>Mujeres Asesinas</i> (Televisa) <i>Renta Congelada</i> (Televisa) <i>Hoy Voy a Cambiar</i> (Televisa, bioseries) <i>Por Siempre Joan Sebastian</i> (Televisa, bioseries) <i>Señorita Pólvora</i> (for Sony Pictures and Televisa) <i>Bienes Raíces</i> (Once TV Mexico) <i>Yago</i> (Televisa) <i>El Hotel de los Secretos</i> (Televisa) <i>Sin Rastro</i> (Televisa) Telenovelas: a catalog with 80 products (Televisa) Unitary: <i>La Rosa de Guadalupe</i>

Source: Made by the authors

Data provided by Nielsen (2016) reveal that the households that have SVoD services watch much less television, and their users tend to be younger. It is added that “the households that have SVoD also have more connected TV sets and general devices than the general population, but traditional TV is still watched by the majority

of these households” (Nielsen, 2016: 5). This information is very revealing because it means that the contents complement each other; however, it is a fact that young people are consuming less and less television and what they do watch is on their devices. Data from the average daily demand expressions point out that Netflix is the platform requested the most by the audience, with 87%, followed by Amazon Video (7%), Hulu (4%) and Facebook (2%).

No doubt the context we have presented implies larger challenges for the TV networks. Televisa has been the leader in telenovela production and no other platform could have at their disposal such a large fiction (telenovelas) catalog as that offered by Blim. For the Latin American market, and the Mexican one in particular, Blim means that connection with the melodramas of yesteryears, with the nostalgia of other times, with reliving stories that left their imprint on the people who grew up with the telenovelas. The sector that lived very close to that genre has not lost it yet, but the challenge will be to appeal to the younger audience who wants to see other contents and other programming options. Claro Video has not produced any original fiction to date. We believe that Amazon Video is an authentic competitor for Netflix since it produces very interesting original series and it is gaining market in the country.

Despite the context described above, the so-called influencers should be paid attention to because they are the independent creators of contents that broadcast their productions on YouTube and Snapchat channels. In 2016 Mexicans dedicated 29% of the time they have to consume contents to watch short videos on these platforms, 17% for Netflix and 33% for linear television (Expansión, 2016). Mexico is the third most important market for YouTube and one of the countries with the influencers that have the largest number of subscribers; they are so successful that they obtained over 700 million pesos (35 million dollars) for publicity in Mexico in 2016.

An analysis of the channel of influencer “Yuya” shows that the most popular Mexican woman has over 21 million subscribers on her channel and some of her videos have 40 million views. She

created her channel in 2009 and to date her videos amass a total of 2,207,990,046 views.<sup>8</sup> Another famous youtuber is “Werevertumorro”, with over 15 million subscribers; another one is “Badabun”, who has more than 11 million followers. We found that the two latter produce content mixing reality and fiction on episodes such as *Atrapando Infieles*, showing how men are easily seduced. Some of their videos have more than 4 million views. Werevertumorro produces a parody of *La Rosa de Guadalupe* entitled *El Girasol de Fátima*, whose 14 episodes have over one million views.

In view of such variety of content and platforms, it is difficult to predict how the market will move in terms of audiovisual content production and the audiences, especially in fiction. Like never before, we are being offered thousands of contents by very powerful companies, but also by ordinary people who propose original content aimed at the young people. The challenge that both VoD platforms and especially TV networks in Mexico are facing is to appeal to young audiences, who seem to prefer the contents provided on YouTube and Snapchat, where they do not have to pay. These platforms have become a window and an opportunity to display new contents that in addition can generate millions in profits to their producers. The control and management of the market, which just a few years ago were in the hands of a few, today are shared and diversified. This variety demands creativity and originality; today like never before the audiences have multiple choices and, as a result, they become segmented. It is still pending to analyze in detail the contents provided by the platforms mentioned here. We are facing an audiovisual reality that overwhelms us, moves and changes constantly.

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<sup>8</sup> Retrieved on April 6, 2018 from <https://www.youtube.com/user/lady16makeup/about>

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## 6

### PERU: A CONFUSED FICTION<sup>1</sup>

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#### **1. Peru's audiovisual context in 2017**

The year 2017 was turbulent for Peru due to climatological problems and different political crisis. The “coastal phenomenon El Niño” produced rains, floods and landslides that brought destruction to 20 regions, affecting about 650 thousand people in Peru. The rainy season dropped, but not the political climate of direct confrontation between the government and the Congress, which led to impeachments of some Ministers and the whole Cabinet, the request for a presidential vacancy, the pardon to former President Fujimori on Christmas Eve – which led to several protests –, and finally, the president's resignation in March 2018.

The reaction of television stations was seen through solidarity campaigns (for the coastal El Niño), or extensive information and debate in the case of political crisis. Unlike what happened in other periods, fiction production was not directly affected by the political climate. Decisions and bets responded to commercial criteria, and the association of networks that took place at the end of 2015<sup>3</sup> con-

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<sup>2</sup> Professors from Pontificia Universidad Católica del Perú.

<sup>3</sup> See Peru's chapter, “Fewer premieres, more reruns”, in the Obitel Yearbook 2017.

tinued without any successful result in production, serving just to recycle old fictions in other stations or to broadcast unsuccessful productions in the weaker stations. A clear example was the Argentinean telenovela *Esperanza Mía*, which premiered on Latina in the afternoon slot, but, due to low ratings achieved after two weeks, continued its broadcast on Panamericana Televisión, its allied station.

Finally, we must say that the announced channel sales reported in the previous yearbook did not succeed, and, while in July RBC reported it was not the time to sell the channel, Latina continued to search for new investors.

1.1. Open television in Peru

Chart 1. National open TV networks/stations in Peru

Private networks/stations (5)	Public networks/stations (1)
Latina (channel 2) América Televisión (channel 4) Panamericana Televisión (channel 5) ATV (channel 9) Nextv (channel 13)	TV Perú (channel 7)
TOTAL NETWORKS = 6 TOTAL STATIONS = 6	

Source: Obitel Peru

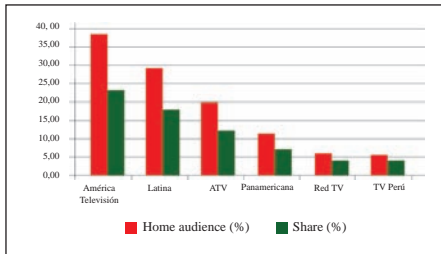
The Peruvian networks remain unchanged with regarding the previous yearbook. Latina and Panamericana Televisión continued with their strategic alliance and the same did América Televisión with ATV and Nextv, owned by Mexican Ángel González. The main change occurred in the structure of América Televisión, with the announcement that Eric Jurgensen – the main responsible for the channel success in the last decade – left the general management at the end of March 2018, a position he held since 2003, when creditor group Plural TV acquired América Televisión.

## 1.2. Audience trends over the year

**Graph 1. TV audience and share by network**

Network	Home audience	%	Share (%)
América Televisión	7.34	36.61	21.1
Latina	5.53	27.58	15.9
ATV	3.61	18.00	10.4
Panamericana Televisión	1.93	9.63	5.5
TV Perú	0.85	4.24	2.4
Nextv	0.79	3.94	2.3
<b>TOTAL</b>	<b>20.05</b>	<b>100.00</b>	<b>57.6<sup>4</sup></b>

Source: Obitel Peru and Kantar Ibope Media



Source: Kantar Ibope Media

In the Obitel Yearbook 2017, we reported that only the main networks had benefited from the strategic alliances made at the end of 2015. This second year the alliances show an improvement for the weakest stations, although without changing the main positions. América Televisión and Latina remain in the lead, but both fall in the share in comparison to the previous year; the case of Latina is striking, since it is the third consecutive year that it reduces its audience, although in small levels. It seems that the change of ownership would not have turned out as expected, and, therefore, constant rumors about interest in selling the company are heard.

On the other hand, ATV – allied to América Televisión – and Panamericana Televisión – allied to Latina – remain in third and fourth place, but both have increased their share compared to the

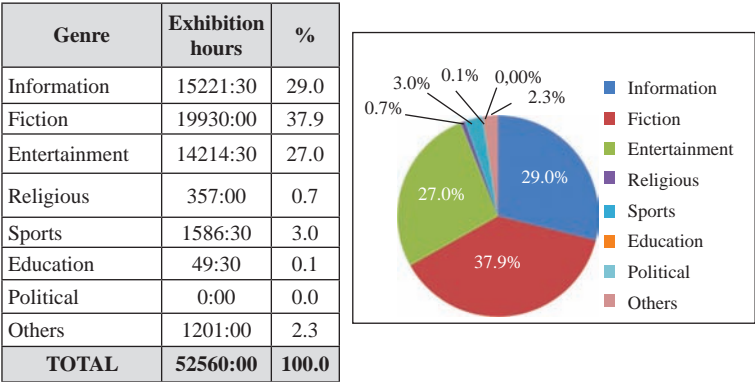
<sup>4</sup> Share does not account for 100% because the rest of open TV channels, cable and VHS/DVD is not considered.

previous year. ATV rose from 9.7 to 10.4, while Panamericana Televisión went from 4.9 to 5.5. More careful strategies, better planning in the contents that were to be forwarded to the screens of smaller channels, and their own proposals have resulted in better numbers, especially in the case of Panamericana Televisión, which has not seen these levels since 2013.

The most relevant piece of information is the fifth position of TV Perú, beating Nextv. Until *Obitel* Yearbook 2016, we did not have TV Perú share data – by decision of the network itself – and last year the data showed how close it was to Nextv. The year 2017 shows that both positions have been reversed, thanks to the more inclusive and dynamic programming of the official government station. It will be interesting to see if the political problems of late 2017 and early 2018 reverse this trend.

However, none of these changes can hide that, in general, the declining trend of the television audience seems unstoppable, reaching up to 20% this year, the lowest figure reached by Peruvian television in the current century.

**Graph 2. Genres and hours broadcast on TV**



Source: *Obitel* Peru

Fiction remains the kind of programming with the greatest presence in open television in Peru, followed by information and enter-

tainment. The percentage of fiction has remained stable for the last four years up to 37%, with slight changes in terms of decimals. It is remarkable the increase in the percentage of entertainment – from 22.5% in 2016 to 27% in 2017 –, which diminishes the presence of information that drops by four percentage points compared to the previous year. This shows the shift of several channels towards entertainment programs, which in recent years have also been disputing high ratings from fiction, as we reported in the Obitel Yearbooks 2014 and 2015.

The decrease of educational shows on open television screens is also evident, despite the effort made by TV Perú all these years. The downward trend of the last five years has made the educational shows drop from 1.8% in 2013 to just 0.1% in 2017, which is a clear sign that commercial stations do not find profitability in this type of programs, which have moved in some cases to pay television.

### **1.3. Advertising investments of the year: in TV and in fiction**

According to the annual report of CPI (Spanish acronym for an opinion and market research company), the advertising investment in 2017 was reduced to 668 million dollars, the lowest figure in the last five years, which meant a fall of 7.9% compared to 2016. Although television continued to be the media that increased collection amounts (47% of the advertising pie chart), compared to the previous year, these meant a decline of almost three percentage points. The only ones that showed growth were internet (rise of 2.5%, reaching 14.4% of the advertising pie chart) and radio (12.7% of the advertising pie chart, which means a 1.3% increase in relation to 2016), which were placed in the second and third places of advertising investment.

### **1.4. Merchandising and social merchandising**

Social merchandising could be found again in Del Barrio Producciones' telenovelas, being the topic of human trafficking the mostly repeated one in its different fictions. In the case of *Colo-*

*rina*, it exposed the fate of many women forced into prostitution by threats or pressure from men who end up dealing them, while in *Sólo Una Madre* newborn children trafficking were part of its initial episodes.

Sexual abuse and women mistreatment were also present in *Colorina* and *Mujercitas*. In the case of *Mujercitas*, a secondary – but important – character suffers the constant mistreatment of her partner and her son. In the final chapter, several actresses appeared in front of the camera and provided figures of Peruvian women who were battered, murdered, raped, girl mothers and street harassed. They also showed differences of opportunities between women and men, something unprecedented in Peruvian television.

Among the fictions issued in 2017, *Amores que Matan* continued, a series produced by América Televisión that focused on domestic violence, which, in many cases, ended with the death of one of the couples. Although the series was not completely broadcast in open signal due to its low ratings, the channel's choice was a series with clear social content.

## 1.5. Communication policies

There were few developments concerning regulations during 2017, and the issued laws had to do mainly with adjustment or clarifications of previous laws. In this way, the criteria to determine rural areas and places of social interest were specified, which will allow some small towns to apply for non-commercial radio or television licenses, with tax benefits.

Likewise, a deadline – March 31, 2018 – was determined so that television stations broadcasting in analogue signal express their interest in having digital signal, which corresponds to them by law.

Finally, deadlines for analogue blackout were adjusted according to the five territories in which the country has been divided. Thus, this will gradually take place between the end of 2020 – in Lima and Callao – and the end of 2028, for towns with less population. These deadlines exempt community, rural border and social in-

terest stations, which were defined more clearly in a legal document to which we referred previously.

## 1.6. ICT Trends

Digital television in Peru turned ten years of operation in 2017, but progress is still slow in taking real advantage of technology. A report from the Consejo Consultivo de Radio y Televisión (ConcorTV, Spanish acronym for Radio and Television Advisory Council) indicated that television stations increased by 6.3% in the country, reaching 1,491, but migration to digital signal continued to be very slow.

Six new frequency bands were added to the 32 digital signals reported in the 2017 yearbook in Lima<sup>5</sup>: Willax TV (frequency bands 1.1 and 1.2), San Martín de Porres University (12.1 and 12.2), RBC (11.1) and RPP (3.2).

## 1.7. Public TV

In previous yearbooks we have reported that TV Perú is a state network used by the different governments in power, as a station at the service of the Executive Power. The government which started in mid-2016 was not the exception, although there were interesting projects, such as information shows in Quechua and Aymara, and shows in Shipibo-Conibo, Awajún and Ashaninka, which are Peruvian native languages, were announced. It also founded a youth channel that promoted national identity in one of its digital signals. But fiction production was not resumed, and for six months program *Conversando con el Presidente* was broadcast, where President Kuczynski interviewed his ministers or personalities from the political arena, to promote government activities.

Youth programming suffered a reduction in its budget and several programs have entered a stand-by phase, until further notice. In December 2017, the channel launched its international signal,

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<sup>5</sup> See Obitel Yearbook 2015 for the list of digital signals in Lima.



which in the country can only be seen through some cable providers or online. Finally, and after the pardon granted to former President Fujimori, several executives and figures of the State institution resigned, among them, the Executive President of the National Institute of Radio and Television, on which TV Perú depends. This brought several changes since January 2018 in the network, which led to a reduction of diversity on the screen from the supposed channel of all Peruvians.

## 1.8. Pay TV

Movistar remains as the leader of pay television, followed by Claro, DirecTV and several companies that cover local regions. The change that has occurred in recent months is that the hiring of some services has been released, which can be acquired independently and it is no longer mandatory to contract the fixed telephone service to have pay television or internet, as Movistar previously required. Likewise, the telecommunications regulatory agency prohibited pay television providers from charging for the sale or rent of decoders, necessary to access all the programming offered by the cable providers.

In February 2018, Movistar launched its Movistar series channel, an exclusive channel where Ibero-American fictions are broadcast, but Peruvian fictions have not been aired, until the time we write this report.

Movistar Plus, one of the exclusive signals of the Spanish provider, began to broadcast *Locos en el Tiempo*, a Peruvian fiction of very low budget that has two recurrent actors – Lucho Cáceres and Christian Ysla – who, in front of a chroma screen, supposedly travel to different historical moments of Peru and the world. The result is a very basic story with evident shortages, but it becomes a milestone since it is the first Peruvian fiction produced exclusively for a cable channel.

### 1.9. Independent producers

Del Barrio Producciones continued to be the driving force behind the independent production of television fiction, in alliance with América Televisión. Del Barrio acquired old successful stories in Latin American television, such as *Colorina* and *Cuna de Lobos*. The remake of *Colorina* did not achieve the level of audience offered by the production company, and a campaign by a conservative sector of Lima society was added. This led to the episodes being reedited, reducing or eliminating the stories that took place in the whorehouse and those that narrated the life of prostitutes. Thus, the telenovela was split into two parts and broadcast as if they were two different products. In the case of *Cuna de Lobos*, despite announcing in August that negotiations with Televisa were advanced, the project was not mentioned anymore.

An element that attracted the attention concerning the marketing strategy of Del Barrio was maintaining a classic style and using social networks in a very limited way, opting instead for face-to-face meetings, autograph signings and photo shoots in shopping centers and markets from different parts of the country, despite having active social networks.

### 1.10. International trends

The effort to commercialize Peruvian productions abroad fell into Tondero's hands, which is a successful production company of Peruvian films that diversified and opened divisions of shows, theater, representation and distribution. In March they announced that they were negotiating with US networks to produce two series (*Clandestino* and *Locos de Amor*, the latter based on a musical film produced by Tondero), and in August they announced an agreement signed with América Televisión to distribute fictions broadcast by the network in Latin American countries and in the US Hispanic market. Until the time we finished this chapter, there was no news of any specific agreement.

Something to highlight in 2017 was the premiere on Willax channel of *Ella Era Bonita*, a Korean version of *Betty, la Fea*. Willax is a small station in Lima<sup>6</sup>, which promised fiction production since it obtained new investors in 2006, without achieving it so far. The appearance of a kind of niche fiction is symptomatic, such as the *dorama* (as telenovelas from Southeast Asia are known), in the same line that Panamericana Televisión has been doing during all its years of crisis, although, in this case, it deals with a story emerging from South America. Reduced costs, fictions with a very faithful audience, but they do not help boost the channel.

## 2. Analysis of the year: national and Ibero-American premiere fiction

**Table 1. Fiction broadcast in 2017 (national and foreign; premieres and reruns; co-productions)**

<b>PREMIERE NATIONAL TITLES – 10</b>	<b>RERUNS – 79</b>
<b>América Televisión – 7 national titles</b> 1. <i>Amores que Matan</i> (series) 2. <i>Colorina</i> (telenovela) 3. <i>Colorina: Madre por Siempre</i> (telenovela) 4. <i>De Vuelta al Barrio</i> (telenovela) 5. <i>Mujercitas</i> (telenovela) 6. <i>Solo una Madre</i> (telenovela) 7. <i>VBQ: Todo por la Fama</i> (telenovela)	<b>Latina – 21 national titles</b> 1. <i>Augusto Ferrando: de Pura Sangre</i> (miniseries – Peru) 2. <i>Camino a Casa</i> (miniseries – Peru) 3. <i>Chacalón: el Ángel del Pueblo</i> (miniseries – Peru) 4. <i>Chapulín el Dulce</i> (miniseries – Peru) 5. <i>Dina Paucar: la Lucha por un Sueño</i> (miniseries – Peru) 6. <i>El Gran Reto</i> (miniseries – Peru) 7. <i>El Profe</i> (series – Peru) 8. <i>Guerberos de Arena</i> (miniseries – Peru) 9. <i>La Fuerza Fénix</i> (miniseries – Peru) 10. <i>Lobos de Mar</i> (miniseries – Peru) 11. <i>Los del Barrio</i> (miniseries – Peru) 12. <i>Los Diablos Azules</i> (miniseries – Peru) 13. <i>Los Jotitas</i> (miniseries – Peru) 14. <i>Misterio</i> (miniseries – Peru) 15. <i>Néctar en el Cielo</i> (miniseries – Peru) 16. <i>Pataclaun</i> (series – Peru) 17. <i>Pide un Milagro</i> (miniseries – Peru) 18. <i>Sabrosas</i> (miniseries – Peru)
<b>Latina – 2 national titles</b> 8. <i>De millonario a mendigo</i> (telenovela) 9. <i>Pensión Soto</i> (series)	
<b>Panamericana - 1 national title</b> 10. <i>Team: tu Mmbajada en el Mundo</i> (series)	
<b>CO-PRODUCTIONS – 2</b>	
<b>América Televisión – 2 titles</b> 11. <i>El Regreso de Lucas</i> (Peru and Argen-	

<sup>6</sup> See *Obitel Yearbooks* 2016 and 2017.

<p>tina)</p> <p>12. <i>Los Santos Peruanos</i> (Peru and USA)</p> <p><b>PREMIERE FOREIGN TITLES – 32</b></p> <p><b>América Televisión – 13 titles</b></p> <p>1. <i>Al Caer la Noche</i> (telenovela – Mexico)</p> <p>2. <i>Carrusel: Nueva Generación</i> (telenovela – Brazil)</p> <p>3. <i>La Viuda Negra</i> (series – Colombia)</p> <p>4. <i>Tres Veces Ana</i> (telenovela – Mexico)</p> <p>5. <i>Vino el Amor</i> (telenovela – Mexico)</p> <p>6. <i>En Tierras Salvajes</i> (telenovela – Mexico)</p> <p>7. <i>Enamorándome de Ramón</i> (telenovela – Mexico)</p> <p>8. <i>Hoy Voy a Cambiar</i> (telenovela – Mexico)</p> <p>9. <i>La Doble Vida de Estela Carrillo</i> (telenovela – Mexico)</p> <p>10. <i>La Esquina del Diablo</i> (telenovela – Colombia)</p> <p>11. <i>La Rosa de Guadalupe</i> (series – Mexico)</p> <p>12. <i>Sin Rastro de Ti</i> (telenovela – Mexico)</p> <p>13. <i>Sin tu Mirada</i> (telenovela – Mexico)</p> <p><b>Nextv – 7 titles</b></p> <p>14. <i>La Casa de al Lado</i> (telenovela – USA)</p> <p>15. <i>Lo que Diga el Corazón: Niche</i> (series – Colombia)</p> <p>16. <i>Señora Acero</i> (telenovela – Mexico and USA)</p> <p>17. <i>Señora Acero 2</i> (telenovela – Mexico and USA)</p> <p>18. <i>Señora Acero 3</i> (telenovela – Mexico and USA)</p> <p>19. <i>Un Día Una Carta</i> (series – Mexico)</p> <p>20. <i>El Señor de los Cielos 5</i> (telenovela – Mexico, Colombia and USA)</p> <p><b>ATV – 6 titles</b></p> <p>21. <i>Amores Robados</i> (miniseries – Brazil)</p> <p>22. <i>Final Feliz</i> (miniseries – Brazil)</p> <p>23. <i>La Doña</i> (telenovela – Mexico and USA)</p> <p>24. <i>Por Siempre</i> (telenovela – Brazil)</p> <p>25. <i>Sin Senos Sí Hay Paraíso</i> (telenovela – USA and Colombia)</p> <p>26. <i>Verdades Secretas</i> (telenovela – Brazil)</p>	<p>19. <i>Torbellino</i> (telenovela – Peru)</p> <p>20. <i>Viento y Arena</i> (miniseries – Peru)</p> <p>21. <i>Yuru, la Princesa de la Selva</i> (miniseries – Peru)</p> <p><b>América Televisión – 4 national titles, 7 foreign titles</b></p> <p>13 22. <i>Al Fondo Hay Sitio (1st season)</i> (soap opera – Peru)</p> <p>23. <i>Al Fondo Hay Sitio (2nd season)</i> (soap opera – Peru)</p> <p>24. <i>Amo Despertar a tu Lado</i> (telenovela – Mexico)</p> <p>25. <i>Corazón Salvaje</i> (telenovela – Mexico)</p> <p>26. <i>El Chavo del Ocho</i> (series – Mexico)</p> <p>27. <i>El Derecho de Nacer</i> (telenovela – Mexico)</p> <p>28. <i>El Privilegio de Amar</i> (telenovela – Mexico)</p> <p>29. <i>La Rosa de Guadalupe</i> (series – Mexico)</p> <p>30. <i>María la del Barrio</i> (telenovela – Mexico)</p> <p>31. <i>Rubí</i> (telenovela – Peru)</p> <p>32. <i>Solamente Milagros</i> (series – Peru)</p> <p><b>Panamericana Televisión – 5 national titles, 6 foreign titles</b></p> <p>33. <i>Calígula, el Ángel Vengador</i> (telenovela – Peru)</p> <p>34. <i>Escándalos</i> (series – Venezuela, USA, Mexico and Panama)</p> <p>35. <i>Esposos pero Tramospos</i> (series – Peru)</p> <p>36. <i>Hasta que te Conocí</i> (series – Mexico)</p> <p>37. <i>La Paisana Jacinta</i> (series – Peru)</p> <p>38. <i>Las Muñecas de la Mafia</i> (series – Colombia)</p> <p>39. <i>Natacha</i> (telenovela – Peru)</p> <p>40. <i>Pasión de Gavilanes</i> (telenovela – Colombia)</p> <p>41. <i>Tres Familias</i> (telenovela – Ecuador)</p> <p>42. <i>Victoria</i> (telenovela – Colombia)</p> <p>43. <i>Virgenes de la Cumbia</i> (series – Peru)</p> <p><b>TV Perú – 1 national title</b></p> <p>44. <i>Conversando con la Luna</i> (miniseries – Peru)</p>
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<p><b>Latina – 3 titles</b></p> <p>27. <i>Esperanza Mía</i> (telenovela – Argentina)*</p> <p>28. <i>La Esclava Madre</i> (telenovela – Brazil)</p> <p>29. <i>Moisés y los Diez Mandamientos</i> (telenovela – Brazil)</p> <p><b>Panamericana – 3 titles</b></p> <p>30. <i>Alguien te Mira</i> (telenovela – USA)</p> <p>31. <i>Esmeraldas</i> (telenovela – Colombia)</p> <p>32. <i>Los Hombres También Lloran</i> (telenovela – Colombia)</p>	<p><b>ATV – 20 foreign titles</b></p> <p>45. <i>A Cada Quien Su Santo</i> (series – Mexico)</p> <p>46. <i>A Sangre Fría</i> (miniseries – Argentina)</p> <p>47. <i>Al Límite</i> (miniseries – Argentina)</p> <p>48. <i>Central de Abasto</i> (telenovela – Mexico)</p> <p>49. <i>Chespirito</i> (series – Mexico)</p> <p>50. <i>Como Dice el Dicho</i> (series – Mexico)</p> <p>51. <i>Corazón Valiente</i> (telenovela – USA)</p> <p>52. <i>Criminal</i> (miniseries – Colombia)</p> <p>53. <i>Decisiones de Mujeres</i> (series – USA)</p> <p>54. <i>Decisiones Extremas</i> (series – Colombia, Mexico, USA and Puerto Rico)</p> <p>55. <i>El Chapulín Colorado</i> (series – Mexico)</p> <p>56. <i>La Vida Es Una Canción</i> (series – Mexico)</p> <p>57. <i>Lo que Callamos las Mujeres</i> (series – Mexico)</p> <p>58. <i>Mar de Amor</i> (telenovela – Mexico)</p> <p>59. <i>Mujer, Casos de la Vida Real</i> (series – Mexico)</p> <p>60. <i>Mujeres Asesinas</i> (series – Argentina)</p> <p>61. <i>Mundo de Fieras</i> (telenovela – Mexico)</p> <p>62. <i>Por Siempre</i> (telenovela – Brazil)</p> <p>63. <i>Qué Bonito Amor</i> (telenovela – Mexico)</p> <p>64. <i>Soy tu Dueña</i> (telenovela – Mexico)</p> <p><b>Nextv – 15 foreign titles</b></p> <p>65. <i>A Cada Quien su Santo</i> (series – Mexico)</p> <p>66. <i>Casado con Hijos</i> (series – Argentina)</p> <p>67. <i>Chespirito</i> (series – Mexico)</p> <p>68. <i>Corazón Valiente</i> (telenovela – USA)</p> <p>69. <i>Flor Salvaje</i> (telenovela – Colombia and USA)</p> <p>70. <i>La Familia Peluche</i> (series – Mexico)</p> <p>71. <i>La Niñera</i> (series – Argentina)</p> <p>72. <i>La Teacher de Inglés</i> (telenovela – Colombia)</p> <p>73. <i>Las Bravo</i> (telenovela – Mexico)</p> <p>74. <i>Lo que la Gente Cuenta</i> (series – Mexico)</p> <p>75. <i>Los Canarios</i> (series – Colombia)</p> <p>76. <i>Ojo por Ojo</i> (telenovela – Colombia and USA)</p> <p>77. <i>Pasiones Prohibidas</i> (telenovela –</p>
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	Mexico) 78. <i>Sin Senos No Hay Paraíso</i> (telenovela – Colombia) 79. <i>Vecinos</i> (series – Mexico)  <b>TOTAL PREMIERE TITLES: 44</b> <b>TOTAL RERUN TITLES: 79</b> <b>TOTAL BROADCAST TITLES: 123</b>
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\* The last episodes were broadcast by Panamericana Televisión.

Source: Obitel Peru

Changes seen in the last years, when national production left aside fewer chapter stories, and fiction has been concentrated in América Televisión, have not meant a significant reduction of productions. The number of titles premiered in 2017 is almost the same as in the previous two years, while the broadcasting of premiere titles from other Obitel countries increased with respect to 2016. However, we must be careful with these figures, since many of the productions were not broadcast completely, because they were taken off the air before their end. The most evident case is that of Latina: its national productions were canceled before the end, which is a setback for a channel that had moved away from national productions.

As in the previous year, reruns were on the rise. This was the highest number of reprises in the six years that we make this report. It shows that Peruvian television is still very cautious in terms of fiction bets, and it will always look for formulas and products that guarantee some success, otherwise they will be quickly withdrawn from the air.

**Table 2. Premiere fiction in 2017: countries of origin**

Country	Ti- tles	%	Chap- ters/ episodes	%	Hours	%
<b>NATIONAL (total)</b>	<b>12</b>	<b>27.3</b>	<b>568</b>	<b>23.3</b>	<b>553:00</b>	<b>23.7</b>
<b>OBITEL COUNTRIES (total)</b>	<b>32</b>	<b>72.7</b>	<b>1869</b>	<b>76.7</b>	<b>1777:00</b>	<b>76.3</b>
<b>Argentina</b>	1	2.3	31	1.3	31:00	1.3
<b>Brazil</b>	7	15.9	504	20.7	499:00	21.4

Chile	0	0.0	0	0.0	0:00	0.0
Colombia	5	11.4	251	10.3	251:00	10.8
Ecuador	0	0.0	0	0.0	0:00	0.0
Spain	0	0.0	0	0.0	0:00	0.0
USA (Hispanic production)	2	4.5	206	8.5	171:00	7.3
Mexico	11	25.0	495	20.3	444:00	19.1
Peru	<b>10</b>	<b>22.7</b>	<b>545</b>	<b>22.4</b>	<b>541:30</b>	<b>23.2</b>
Portugal	0	0.0	0	0.0	0:00	0.0
Uruguay	0	0.0	0	0.0	0:00	0.0
Venezuela	0	0.0	0	0.0	0:00	0.0
CO-PRODUCTIONS (total)	<b>8</b>	<b>18.2</b>	<b>343</b>	<b>14.1</b>	<b>330:30</b>	<b>14.2</b>
Peruvian co-productions	<b>2</b>	<b>4.5</b>	<b>23</b>	<b>0.9</b>	<b>11:30</b>	<b>0.5</b>
OBITEL COUNTRIES CO-PRODUCTIONS	<b>6</b>	<b>13.6</b>	<b>320</b>	<b>13.1</b>	<b>319:00</b>	<b>13.7</b>
<b>GENERAL TOTAL</b>	<b>44</b>	<b>100.0</b>	<b>2437</b>	<b>100.0</b>	<b>2330:00</b>	<b>100.0</b>

Source: Obitel Peru

The year 2017 reversed the trend observed in the previous year, as Brazilian and Argentinean fictions reappeared on Peruvian screens, and Colombian fictions increased. Those who saw their presence reduced – concerning the number of titles – were fictions from Mexico and the US. But again the number of titles does not allow to properly observe what happened in Peruvian television, because, while Mexican fictions were broadcast, some Brazilian and Argentinean productions were rescheduled or changed from stations in search of a better audience and, in some cases, they were cancelled.

As in previous years, prime time is still the preferred time slot for national and Ibero-American fiction. The afternoon slot, formerly the time for telenovelas in Peru, maintains a space for fictions from other Latin American countries. The presence of some Peruvian chapters in the morning slot answers to a youth series produced by the Asociación de Exportadores del Perú (Association of Peruvian Exporters), in a low-audience schedule that shows Panamericana televisión's poor strategy. On the other hand, the evening slot shows the only four episodes issued from one of Latina's fiction bets, which was cancelled within a few chapters, showing the low tolerance that Peruvian channels have with products that do not achieve a minimum audience quickly.

Table 3. Chapters/episodes and hours broadcast per time slot

Time slot	National				Ibero-American				Total			
	C/E	%	H	%	C/E	%	H	%	C/E	%	H	%
Morning (6:00-12:00)	10	1.8	5:00	0.9	211	11.3	160:30	9.0	221	9.1	165:30	7.1
Afternoon (12:00-18:00)	0	0.0	0:00	0.0	575	30.8	574:00	32.3	575	23.6	574:00	24.6
Prime time (18:00-23:00)	554	97.5	544:00	98.4	709	37.9	704:00	39.6	1263	51.8	1248:00	53.6
Night (23:00-6:00)	4	0.7	4:00	0.7	374	20.0	338:30	19.0	378	15.5	342:30	14.7
Total	568	100.0	553:00	100.0	1869	100.0	1777:00	100.0	2437	100.0	2330:00	100.0

Source: Obitel Peru

Table 4. Formats of national and Ibero-American fiction

Format	National					Ibero-American				
	Titles	%	C/E	%	H	%	Titles	%	C/E	%
Telenovela	8	66.7	518	91.2	508:00	91.9	23	71.9	1452	77.7
Series	3	25.0	47	8.3	43:30	7.9	7	21.9	407	21.8
Miniseries	1	8.3	3	0.5	1:30	0.3	2	6.3	10	0.5
Telefilm	0	0.0	0	0.0	0:00	0.0	0	0.0	0	0.0
Unitary	0	0.0	0	0.0	0:00	0.0	0	0.0	0	0.0
Docudrama	0	0.0	0	0.0	0:00	0.0	0	0.0	0	0.0
Others (soap opera, etc.)	0	0.0	0	0.0	0:00	0.0	0	0.0	0	0.0
Total	12	100.0	568	100.0	553:00	100.0	32	100.0	1869	100.0

Source: Obitel Peru



**Table 5. Formats of national fiction per time slot**

Format	Morn- ing	%	Af- ter- noon	%	Prime time	%	Night	%	To- tal	%
<b>Telenovela</b>	0	0.0	0	0.0	7	77.8	1	100.0	8	66.7
<b>Series</b>	1	50.0	0	0.0	2	22.2	0	0.0	3	25.0
<b>Miniseries</b>	1	50.0	0	0.0	0	0.0	0	0.0	1	8.3
<b>Telefilm</b>	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
<b>Unitary</b>	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
<b>Docudrama</b>	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
<b>Others (soap opera, etc.)</b>	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
<b>Total</b>	<b>2</b>	<b>100.0</b>	<b>0</b>	<b>0.0</b>	<b>9</b>	<b>100.0</b>	<b>1</b>	<b>100.0</b>	<b>12</b>	<b>100.0</b>

Source: Obitel Peru

As we reported in 2017 yearbook, the telenovela has returned to be the preferred fiction production in Peru, leaving miniseries aside, which at the beginning of the decade was the favorite format. They all were placed in prime time, except the unsuccessful bet of Latina. The end of *Al Fondo Hay Sitio* eliminates the presence of the soap opera this year, but it will be necessary to observe how *De Vuelta al Barrio* – originally proposed as a telenovela – develops, since it begins to show characteristics which are similar to the soap opera it replaced.

**Table 6. Time period of national fiction**

Time period	Titles	%
<b>Present</b>	10	83.4
<b>Period</b>	1	8.3
<b>Historical</b>	1	8.3
<b>Other</b>	0	0.0
<b>Total</b>	<b>12</b>	<b>100.0</b>

Source: Obitel Peru

Reduced resources of Peruvian television make the choice of present time fictions the most common. Only two fictions situated in the past were seen in 2017, the 1970s reproduction in *De Vuelta al Barrio*, and colonial times in the case of miniseries *Los Santos Peruanos*. However, the general trend is to have contemporary fictions.

**Table 7. The ten most watched titles**

	Title	Country of original idea or script	Network	Format/genre	N. of chap./ep. (in 2017)	Time slot	Rating	Share
1	<i>VBQ: Todo por la Fama</i>	Peru	América Televisión	Telenovela/melodrama	96	Prime time	20.3	33.0
2	<i>De Vuelta al Barrio</i>	Peru	América Televisión	Telenovela/melodrama	162	Prime time	19.0	29.8
3	<i>Solo una Madre</i>	Peru	América Televisión	Telenovela/melodrama	89	Prime time	18.3	29.8
4	<i>Mujercitas</i>	Peru*	América Televisión	Telenovela/melodrama	79	Prime time	16.8	26.3
5	<i>El Regreso de Lucas</i>	Argentina	América Televisión	Telenovela/melodrama	20	Prime time	15.4	24.7
6	<i>Colorina: Madre por Siempre</i>	Peru	América Televisión	Telenovela/melodrama	14	Prime time	15.0	24.3
7	<i>Colorina</i>	Peru	América Televisión	Telenovela/melodrama	54	Prime time	14.3	22.7
8	<i>Moisés y los Diez Mandamientos</i>	Brazil	Latina	Telenovela/melodrama	231	Prime time	12.4	21.4
9	<i>La Rosa de Guadalupe</i>	Mexico	América Televisión	Series/melodrama	85	Prime time	11.5	24.6
10	<i>Amores que Matan</i>	Peru	América Televisión	Series/melodrama	14	Prime time	13.6	28.0
<b>Total productions: 10</b>				<b>Foreign scripts: 3</b>				
100%				30%				

\* Free adaptation of Louisa May Alcott's novel.

Source: Obitel Peru and Kantar Ibope media

**Table 7a. The ten most watched national titles**

	Title	Country of original idea or script	Network	Format/genre	N. of chap./ep. (in 2017)	Time slot	Rating	Share
1	<i>VBQ: Todo por la Fama</i>	Peru	América Televisión	Telenovela/melodrama	96	Prime time	20.3	33.0
2	<i>De Vuelta al Barrio</i>	Peru	América Televisión	Telenovela/drama, comedy	162	Prime time	19.0	29.8
3	<i>Solo una Madre</i>	Peru	América Televisión	Telenovela/melodrama	89	Prime time	18.3	29.8

4	<i>Mujercitas</i>	Peru*	América Televisión	Telenovela/melodrama	79	Prime time	16.8	26.3
5	<i>El Regreso de Lucas</i>	Argentina	América Televisión	Telenovela/melodrama	20	Prime time	15.4	24.7
6	<i>Colorina: Madre por Siempre</i>	Peru	América Televisión	Telenovela/melodrama	14	Prime time	15.0	24.3
7	<i>Colorina</i>	Peru	América Televisión	Telenovela/melodrama	54	Prime time	14.3	22.7
8	<i>Amores que Matan</i>	Peru	América Televisión	Series/melodrama	14	Prime time	13.6	28.0
9	<i>Pensión Soto</i>	Peru	Latina	Series/co-media	26	Prime time	11.2	17.7
10	<i>Los Santos Peruanos</i>	Peru	América Televisión	Miniseries/drama	3	Mañana	6.3	14.3
<b>Total productions: 10</b>				<b>Foreign scripts: 1</b>				
100%				10%				

\* Free adaptation of Louisa May Alcott's novel.

Source: Obitel Peru and Kantar Ibope media

National production occupies the first seven audience positions, and eight out of the ten most viewed fiction titles in Peruvian television, something that did not happen since 2013. A closer look at tables 7 and 7a highlights the characteristics of Peruvian television market. Youth telenovela *VBQ* (already in its third season) occupies the first audience position for the first time, but without achieving the audience numbers that Peruvian fictions occupied in the previous years. It does not even repeat the numbers of its previous years, showing that the absence of *Al Fondo Hay Sitio* and the formula wear of Del Barrio Producciones are affecting the audience. For this reason, Del Barrio adopted strategies such as artificially splitting telenovela *Colorina* into two parts – without much success – or returning to the stories of singers and female self-improvement that meant audience success years ago.

Brazil again has a fiction among the top ten, but it is striking that, in this case, it is not a Globo's production, but one of Record TV. In previous yearbooks we had already commented on the scarce presence of Globo's fictions in Peruvian television, which sometimes managed to locate themselves at the end of the table of the

most viewed titles. But this presence means a change, the same as the presence of *La Rosa de Guadalupe*, a Mexican series that has always been in the audience rankings, but for the first time manages to be among the ten most viewed fictions.

Although not observed in this list – which only considers Obitel fictions –, Turkish fictions also seem to be in retreat, since in 2017 there are fewer Turkish fictions among the most viewed<sup>7</sup> and, in general, fewer new titles.

There is a confusing scene in the television channels, which are not sure about where to bet in terms of fiction, because the fictions did not work on Latina, audiences diminished on América, Del Barrio's formulas started to get exhausted and Turkish telenovela wear is felt. Projects are unlikely, and investments are uncertain.

**Table 8. Audience profile of the ten most watched titles:  
gender, age, socioeconomic status**

Title		Network	Gender %		Socioeconomic status %		
			Women	Men	AB	C	DE
1	<i>VBQ: Todo por la Fama</i>	América Televisión	62.7	37.3	15.6	40.8	43.7
2	<i>De Vuelta al Barrio</i>	América Televisión	60.7	39.3	17.5	42.4	40.1
3	<i>Solo una Madre</i>	América Televisión	62.7	37.3	16.3	40.3	43.4
4	<i>Mujercitas</i>	América Televisión	61.7	38.3	17.3	42.4	40.4
5	<i>El Regreso de Lucas</i>	América Televisión	60.2	39.8	18.6	40.9	40.5
6	<i>Colorina: Madre por Siempre</i>	América Televisión	61.1	38.9	13.6	43.1	43.3
7	<i>Colorina</i>	América Televisión	63.3	36.7	18.7	41.7	39.6
8	<i>Moisés y los Diez Mandamientos</i>	Latina	65.8	34.2	21.5	48.9	29.5
9	<i>La Rosa de Guadalupe</i>	América Televisión	66.2	33.8	13.2	41.4	45.4
10	<i>Amores que Matan</i>	América Televisión	64.5	35.5	17.6	40.6	41.8

<sup>7</sup> If considered on our top ten, they would have been on eighth and tenth places in Table 7.

	Title	Network	Age groups %					
			3-10	11-17	18-25	26-37	38-49	50-99
1	<i>VBQ: Todo por la Fama</i>	América Televisión	17.2	17.2	14.8	19.0	13.9	17.9
2	<i>De Vuelta al Barrio</i>	América Televisión	16.9	15.0	14.1	20.5	14.3	19.2
3	<i>Solo una Madre</i>	América Televisión	14.9	16.1	14.7	20.6	14.5	19.3
4	<i>Mujercitas</i>	América Televisión	15.7	15.9	14.4	20.1	15.5	18.3
5	<i>El Regreso de Lucas</i>	América Televisión	14.5	15.7	15.0	18.6	15.4	20.7
6	<i>Colorina: Madre por Siempre</i>	América Televisión	13.6	15.1	15.6	22.0	14.7	19.0
7	<i>Colorina</i>	América Televisión	13.7	13.5	15.0	21.0	15.5	21.4
8	<i>Moisés y los Diez Mandamientos</i>	Latina	8.4	9.1	8.9	16.5	16.7	40.3
9	<i>La Rosa de Guadalupe</i>	América Televisión	18.5	16.5	14.8	19.2	15.5	15.5
10	<i>Amores que Matan</i>	América Televisión	13.5	12.9	16.7	18.6	14.5	23.9

Source: Obitel Peru and Kantar Ibope media

The composition of the audience maintains the same characteristics observed years ago: fiction is viewed mainly by women from the lowest socioeconomic levels. Some pieces of information stand out in relation to different preferences of the audience, such as the percentage of young and child audiences in *VBQ* and *La Rosa de Guadalupe*, or the very high percentage of audience over 50 years old which was the most marked audience of *Moisés y los Diez Mandamientos*. These last two are the ones with the highest percentage of female audience among the ten most viewed titles. The age characteristics of *VBQ* are understandable, because it is the main audience to which this fiction is directed, but the audience of the other mentioned fictions reveals a present religiosity in Peruvian women, especially the one of lower economic resources

The case of *Mujeres que Matan*, a fiction dedicated to dealing with issues of family abuse, also received greater attention from women, although their general rating numbers were lower than expected. It is also interesting to observe how *Moisés y los Diez Mandamientos*, a fiction that mixes religious themes with romance and

some eroticism, had its strongest audience in sector C, while for the Mexican series the sector DE is the main one, responding to a more conservative position of the sectors of lower economic resources.

### **3. Transmedia reception**

As we have reviewed in previous yearbooks, the insecurity and timidity with which Peruvian television networks approached transmedia narratives as well as the use of online platforms in recent years reveal the conception of the consumption of local fiction production.

Peruvian networks with the greatest presence in terms of the use of these resources have been, by coincidence, the two with the highest audience numbers: América Televisión and Latina. Both have developed proposals to transcend television and use what the internet offers as a communication environment. However, in this intermittent and irregular process, these networks have been the ones that have made the most controversial decisions and created distrust regarding transmedia actions.

In the case of América Televisión, the investment and dedication in América TVGO platform since it was launched, in December 2013, are undeniable to centralize any alternative linked to content distribution on the internet. More than a repository of shows, América TVGO was the promise of what a consolidated leader network, concerning rating numbers, could achieve by venturing into this environment, becoming the pioneer in offering this alternative to local audiences.

However, at the beginning of 2016, América Televisión decided that those interested in continuing to rely on the facilities offered for free by América TVGO had to pay to maintain the service. This decision made by the network became the first obstacle in the process of bringing television stations closer to the unexplored conditions that the internet could offer to broadcasters, and thus, to their viewers. This strategy revealed a lack of clarity from the part of local audiences to distinguish the television media conceived as broadcast,

from the consumption of television content that could be made on the internet as well as the possibilities that this environment could provide to the user. The audience's complaint about not understanding why they should pay for something they considered free is also América Televisión's responsibility, since in the first years of free access to its platform it did not make clear differences between the media and the internet environment.

At the beginning of 2017 Latina announced it was resuming fiction production. As a result, we had series *Pensión Soto*. This station had worked on the possibilities of complementing television and internet for information and entertainment programs through Dual (exclusive and live expansion of television content through the web while the emission of a television show is in the commercial breaks). *Pensión Soto* was announced as the first fiction program made in Peru, its premiere would take place on the internet, rather than on television. On the stated date, a significant number of users accessed Latina's social networks for this purpose. However, at the time scheduled for the first chapter release, the leading actress, Tatiana Astengo, appeared for a few minutes on screen playing the character of Soila Soto and inviting the audience to view the first chapter four days later through Latina, which generated much criticism from the part of the audience<sup>8</sup>.

This strategy on the part of Latina marks another obstacle in the implementation of transmedia and the use of online platforms in the Peruvian television. Although the network could have argued that premiere promotions did not refer specifically to the emission of the first episode, it was not indicated otherwise, and it was counter-productive for the foundations of a transmedia culture, since this understandable discontent inevitably collaborates with the perspective that the internet does not offer something differentiated or advantageous with respect to television. When this seemed to have its first local fiction representative, the expectation of the audiences was betrayed.

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<sup>8</sup> <http://larepublica.pe/espectaculos/876790-criticas-en-facebook-pension-soto-tras-su-polemico-estreno-video>

It is essential that our networks clarify what their perspective of transmedia narratives and the use of their platforms is, so they do not become mere echoes of the television, but, instead, they can be used by audiences increasingly closer to current technology and less identified with the model of the traditional television screen.

#### **4. Highlights of the year**

Some of the most noticeable elements can be observed in the comments to tables 7 and 8, where we realize that fiction does not seem to have the solid presence of previous year. As we reported in the 2016 yearbook, after the Turkish telenovela import boom, Peruvian fiction turned to much more conservative themes and classic stories. But three years later that formula and even Turkish telenovela themselves did not achieve the audience levels the networks were used to. In search of different stories and exotic landscapes, some channels have broadcast telenovelas from Philippines, India, Romania or Korea, getting some audience niche, but not enough to conquer the large audience.

Peruvian television has continued reacting to the results, but its reactions have not been successful, and towards the end of the year it was still trying new formulas to bring the old figures back. As we anticipated in the 2017 yearbook, América Televisión is the only space where Peruvian fiction has an important place. After the entrepreneurial stories, with strong and proactive female characters, and faced to the threat of Turkish telenovelas, they decided to return to the classical melodramas of suffering mothers. In 2018, the bet to return to the roots of stories based on popular singers is still unknown, but they do not seem to be successful in Peru – although it has been announced that two of the fictions made by Del Barrio will be offered to the Asian market. If the expected results are not achieved, it would not be strange for them to change course again, showing little clarity about what they should do for the Peruvian audiences.

In the other networks, the situation is similar. Latina issued Peruvian fiction with two projects, which did not work as expected.



Problems were not only related to the quality of the product, but also the policies of the channel. *Pensión Soto* was issued weekly, a frequency which is no longer accepted by the Peruvian audience. As we have pointed out in previous yearbooks (2015, 2016, 2017), broadcasting a weekly episode of fiction is practically condemning it to a small audience, which is used to follow the fictions daily. Although the sitcom was recorded completely, not all its chapters were broadcast. The case of *De Millonario a Mendigo* depicts Latina's mistake even more, since they decided to broadcast this fiction recorded three years ago during the pre-Christmas time and reediting the episodes – as the leading actor, a former contestant of reality programs, reported. Little promotion, broadcasting slot, reediting and reductions of the chapters diminished the opportunities to the product and it was cancelled as soon as it was released. Even so, Latina is preparing the return of *Torbellino* in 2018, a youth telenovela from the 1990s, seeking to ensure audience through the nostalgia of old viewers.

ATV and TV Perú continued the trend of the last two years, leaving aside any possibility of fiction production, while Panamericana and Nextv continue with financial problems and have preferred to be nourished with what the allied networks can offer them, since that means zero investment. Risks are lower and even some projects that seem to have some assurance – like *Colorina* – do not necessarily work in a production system that remains insecure and maintains many shortages from past years. In a way, it was a coincidence that, faced up to this weak television fiction industry – without clear policies or horizons –, 2017 was the year when Genaro Delgado Parker died, the great driving force of Peruvian television in its first 40 years of existence. Unfortunately, Delgado Parker's ideas, policies and tricks ended up blurring the image of the person who could have been the greatest Peruvian broadcaster, and he was pushed into the background unable to improve television in this century. Peruvian television companies seem to be in a blind pursuit of what to do with fiction in the coming years.

## 5. Theme of the year: TV fiction on video on demand platforms

As we can already envisage, there are few video on demand (VoD) experiences in the Peruvian scene concerning Ibero-American television fiction. It is true that technological developments and consumption possibilities in different platforms are increasingly closer to different audiences, and that different screens, new formats and pay TV offer a diversity of ways and access to the television experience. However, for the Peruvian audiovisual industry they are highly risky approaches based on the economic investments required, ways of consumption of Peruvian national audiences and business schemes of Peruvian society

As it was already pointed out in this chapter, the largest offer of local video on demand is found in América TVGO, América Televisión's pay platform, which works as a digital repository of all its programs – cultural, information, entertainment and fiction – and requires a monthly pay to be accessed. During the first years of the platform, the programming offered was the same as that broadcast by open and free signals of traditional television.

In 2016 some changes began to be observed when América TVGO became the repository of *Amores que Matan* (2016), a fictional series that portrayed real cases of women who have been victims of violence. The series counted on the conduction of Mónica Sánchez, and it was released in open signal around the great mobilizations of #NiUnaMenos Peru. As it did not reach the expected audience figures, the series was exclusively hosted by SVoD América TVGO. At the end of 2016 and throughout 2017, the platform has begun to offer unpublished chapters of its most successful series, telenovelas premieres before open signal, and specially the possibility of previewing chapters of some of its own national fiction productions. While this began as a strategy to raise the rating of some products that did not work as well as the television company expected – *Colorina* (2017) –, then it became a plus of the digital platform. Even so, most of the current television audiences in Peru consider that television is access free and the digital platform does

not result to be an attractive offer. The idea that SVoD allows us, users, to have unrestricted access to some contents based on our own time and experiences is not a widespread consumer practice at this moment in Peru.

Despite this, América Televisión continues to invest time exploring possibilities – albeit low cost –, and in February 2018 it offered the first series made especially for the platform: *Como en TV*, a webseries of ten episodes of variable duration (between seven and ten minutes), with special guests – many of them station stars. The series tells the story of a fiction production team and the problems that arise in the actual process of producing an audiovisual product. It is a metadiscourse about the television itself, the processes of project selection and audiovisual production, with segments of local humor and some intellectual pretensions.

Currently, América TVGO has very little publicity, which are just static images before starting the chapters of the fiction series. In no case it presents interruptions to the stories.

The original touch of using different technical and digital possibilities is maintained for the Peruvian case in the news and entertainment. América Televisión again offers a full newscast for digital platforms on Facebook live, with *América Noticias Digital*, an exclusive newscast that runs from Monday to Friday at 1:30 PM.<sup>9</sup>

In turn, Latina offers *Latina Noticias Digital*<sup>10</sup>, which is the edition of the television broadcast of the day. Its main feature is that, while advertising is broadcast on open signal, in the digital emission the hostess maintains a dialogue with her audience through Facebook and Twitter. Latina also offers *Barra Libre*, an exclusive information program for the internet, hosted by several of its journalists.<sup>11</sup>

<sup>9</sup> <https://www.facebook.com/americanoticiasoficial>

<sup>10</sup> <https://www.facebook.com/LatinaNoticias.pe>/<https://www.youtube.com/channel/UCp-SJ5fGhmAME9Kx2D3ZvN3Q>

<sup>11</sup> [https://www.youtube.com/watch?v=hZ1mwsnLD5g&list=PLz\\_\\_lyb73hJwLfcH7xGS11AFcj0XRLKXY](https://www.youtube.com/watch?v=hZ1mwsnLD5g&list=PLz__lyb73hJwLfcH7xGS11AFcj0XRLKXY)

ATV counts on its YouTube channel, but its free digital bet via streaming does not consider fiction, only information. The channel shares material that is organized in relation to the programs of greatest trajectory and importance in the broadcast station: *Día D*, *Nunca Más* and *Central de Noticias*. In 2017, ATV offered exclusive content through Facebook live, such as sports magazine *Deportes en la Red*, and in 2018 it is offering some innovations for its 35 years of institutional life.

Despite the problems, Panamericana Televisión – formerly leader network – takes advantage of social media, such as Facebook live, to offer exclusive interviews by young journalist Francisco Flores. Its internet bet is exclusively associated to information too.

In relation to the catch-up TV model, we should point out that, in Peru, Movistar Play, HBO Go, Fox Play and Claro Video began to offer content on alternative screens two years ago. Thus, 2017 was the year of the largest bets, when Movistar Play platform improved a lot and became an alternative for younger audiences.

Visión TV<sup>12</sup> is an exclusive Cable Visión station for the Eastern zone of Lima, which currently has a very complete web platform, where it offers information – local, sports, news, cultural, entertainment – with shows and trends – a live signal with live news and a musical signal with a very varied programming. In the afternoons, *Mirando la Radio* stands out with live and voice-over broadcast, ballads music videos and romantic rhythms.

Digital Perú TV is another new experience in relation to the digital and social media space in Lima. It counts on four channels, two of them transmit programming of trips, local parties, video clips or old concerts, and the other two transmit on open signal: Congress TV and Bethel TV. In these two last cases, this transmission results in a signal without content when the original channels are out of the air.

However, we note that this is the only web channel with sponsors on its platform – with static logos at the end of the page. Among

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<sup>12</sup> <http://visiontv.com.pe/>

them, we can find Alicorp, Ajinomoto, Gloria, Los Portales. Digital Perú TV has its own programs, such as *Tiempo de Hablar*, *Divas*, *Salud Digital*, *Salud Contigo*, *Cocinando en Digital*, *El Closet de Fernando*, *Infiltrados*, and all of them are conversation, office or entertainment programs, whose financial costs are easier to solve. Digital Perú TV also has some stars from the local Peruvian entertainment, such as Fernando Armas, Lalo Martins, Martín del Pomar, Lucecita, Karen Dejo, Nicolás Lúcar, Paloma Fiuza, among others. It is necessary to point out that many of these stars left open television some time ago – some in the middle of the controversy – and have found in the digital proposal a space to stay active.

As we pointed out in previous yearbooks concerning Peruvian webseries, between 2013 and 2014 five productions were premiered, which represented a change in the work dynamics as well as an approach to digital platforms and proximity with their audiences. *Aj Zombies*, *Perfectos Imperfectos*, *Sola por Hoy*, *Tal Como Eres* and *Los Cinéfilos* are examples of interesting products that show proximity with their audience and high consumption. Most of them – as we pointed out in previous yearbooks – had an average of 40 thousand subscribers to their channels<sup>13</sup>, but, after successful seasons, filmmakers bet for other kinds of projects in the audiovisual market.

Other bets on the use of internet and digital platforms are far from television. Newspaper *La República* offers us diverse informative content with LRTV, a proposal of information programs with the participation of different hosts. Some of its shows are: *Sin Guión*, hosted by journalist Rosa María Palacios; *10 minutos*, hosted by Inés Llinás and Zejo Cortez; *Sigrid.pe*, hosted by Sigrid Bazán; and *Tr3s D*, which includes participation of journalists and columnists Augusto Álvarez Rodrich, Mirko Lauer and Fernando Rospigliosi.

In this short tour we can see that multiple possibilities of platforms are being exploited by the informative and entertainment spaces. The most important newspapers and information content

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<sup>13</sup> Review Peruvian chapter in *Obitel Yearbook 2015*: “Peru: fiction losing ground”.

companies are updating their pages and offering their audiences exclusive programming by taking advantage of the internet possibilities.

Producing fiction means great and risky economic investments for national companies, and television in Peru maintains the logics of the original broadcast. The fiction projects for which Peruvian television bets and that achieve high levels of rating point to the main audience – women over 50 years old –, which complicates the scenario, since broadcasters are thinking about television products for an audience that is not in the new platforms, but who put their product in them. At the same time, the investments they make for new platforms in search of younger audiences still do not achieve the results expected by companies used to shorter response times.

An obvious fact in this scene is that television broadcasters are not thinking of these platforms as new media with new logics and dynamics of production and consumption, but as extensions of the classic screen. And the stories of fiction do not find a balance in this changing time, which forces them to betray the very dynamics of fiction.



## PORTUGAL: ONLINE TV: NEW STRATEGIES FOR FICTION<sup>1</sup>

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### 1. Portugal's audiovisual context in 2017

In 2017, the free-to-air channels consolidated their strategies for fiction – RTP by producing series and SIC and TVI producing telenovelas. There were no significant changes in the quantity on offer or the basic characteristics of the adopted formats and genres. Therefore, the main transformation in the market was in the digital environment, especially for the state-run network and with the production of shows that were made available online in its entirety and in bulk. These first initiatives contribute towards a break from the traditional way in which television content is produced and consumed, as well as strengthening the technical and artistic side of media in the future. Years overdue, online TV in Portugal seems to begin to flourish.

#### 1.1 Open TV in Portugal

**Chart 1. National open TV networks/channels in Portugal**

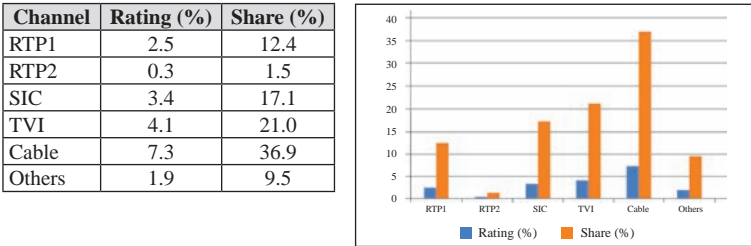
Private networks/channels (2)	Public networks/channels (4+1)
SIC TVI	RTP1 RTP2 RTP3 RTP Memória Canal Parlamento
Total networks =3 Total channels= 7	

Source: Obitel Portugal

<sup>1</sup> The Portuguese team would like to thank Caem, GfK and Marktest-MediaMonitor for their cooperation in gathering and processing the necessary data upon which this chapter relies.

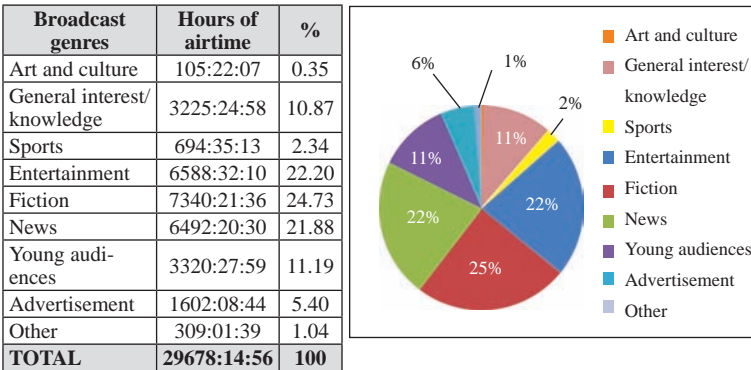


Graph 1. TV rating and share per channel



Source: Obitel Portugal – Caem/MediaMonitor MMW/Telereport

Graph 2. Genres and hours broadcast on TV



Source: Obitel Portugal – Caem/MediaMonitor MMW/Telereport

Between 2016 and 2017, there was a decreased offering for sports (–43%) and news (–10%). This may be attributed to the negotiation of the transmission rights for football matches among the open TV networks, pay TV and football clubs, as well as a re-inforced programming offer by the 24 hours news channels in the three major networks (RTP3/RTP; SIC Notícias/SIC; TVI24/TVI). Regarding fiction, there was a 4% increase on offer, which added to an 11.5% increase of fictional content since 2015.

## 1.2 Audience trends over the year

The generalist networks ended the year with a slight drop, while the cable universe and others (where VoD, consoles and other OTT

services are included) set themselves below 50% of the daily rating. During the 47th week of the year, which corresponds to November 20 to 26, the ratings for all the subscription channels combined were 35.2%, while pre-recorded viewing, unmeasured channels and video games obtained a 9.4% rating<sup>2</sup>. The numbers show that the relevance of public network RTP and even more so for private networks SIC and TVI is still enormous regarding what viewers choose to watch, which at times does not correspond to the public perception in a time when so much is being said about the impact of new content providers such as Netflix.

RTP kept its alignment throughout daytime, which the current management considers to be a period of small investment, even though it is the network's most competitive slot due to an ageing audience that remains loyal to the public station. *O Sábio*, a telenovela produced by SP Televisão and aired daily after the lunchtime news, was their sole investment in a daily melodramatic fiction format, as a strategy to complement and not directly compete with the private networks, which reserve the slot with bigger viewer numbers for telenovelas. Regarding prime time, RTP management attempted to revolutionize it, which translated itself more in marketing rather than in an actual change. This had already been announced in the previous year, when the horizontal scheduling based on daily long-running fiction was replaced by a vertical scheduling with a different series on each day of the week. Nevertheless, the scarce investment afforded to fiction merely allowed for the production of ten low budget series. This did not contribute to the heralded development of a new industry based on series that would be able to please the Portuguese audience and have the potential to sell internationally. Their ratings were minimal and paled in comparison with the telenovela industry that supports prime time on private networks SIC and TVI. The two seasons of *Sim, Chef!*, an adaptation of the Russian format *Кухня*, produced by Valentim de Carvalho and aired

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<sup>2</sup> Recovered on March 28, 2018 from <http://www.meiosepublicidade.pt/2017/11/audiencias-tv-canaais-cabo-voltam-registar-numeros-baixos-2017/>

by the public network between January 4 and December 13, was the longest series, comprising 40 episodes over two seasons and being the only show to reach the national *top ten*.

The private networks kept their programming strategy unchanged, with TVI distancing itself in the lead due to two projects with major ratings – *A Única Mulher* and *A Herdeira*. These were telenovelas that relied on showing uncommon and controversial worlds, such as, in the case of *A Única Mulher*, focusing its conflict on the relationship between Portugal and Angola – a former Portuguese colony – and exposing the underlying racism that still exists in both societies. Due to its success, the network insisted on the social diversity theme for its next project by setting the story for *A Herdeira* in a gipsy community. As for SIC, even though its telenovelas *Amor Maior* and more so *Paixão* struggled to compete for the lead in ratings, the opposite was true for the second prime time slot with two other domestic shows. *Rainha das Flores* and *Espelho d'Água* consolidated the network's strategy to invest in national fiction and gradually replace the Brazilian shows produced by Globo, on which SIC relied for many years.

When analysing the domestic television universe and specifically the week from November 20 to 26, as described above, the average daily consumption per individual was 4h45m. The offer on Digital Terrestrial Television (DTT) was expanded to seven channels by adding RTP3 and RTP Memória, both under the umbrella of the public network, to the current RTP1, RTP2, SIC, TVI and ARTV (Parliament TV). This generated some criticism by the private networks. The government has already manifested its intention to offer two more channels for public bidding, a process that should take place during 2018.

### 1.3. Advertisement investments: in TV and in fiction

Portugal saw 2017 end with an additional 14 thousand hours of advertisement across the 33 TV channels being monitored; 40% of this investment was made on the open TV channels, 30% being on

the commercial channels (SIC and TVI). The remaining 60% investment was made on pay TV channels, particularly TVI24, followed by Record TV Europa and Fox. Considering all channels overall, the total investment corresponded to about 38 hours per day of advertisement.<sup>3</sup> When looking at the data, there is a 16% increase in the advertisement market, a growth trend that started in 2012, with television being yet again at the top of the investment breakdown (79% of total investment in media).

The data regarding total revenue billed by networks due to product placement and soft sponsoring advertisement is still difficult to obtain. Therefore, this analysis is based on scarce information and by establishing a comparison with previous years. Still, if we look at the fiction products themselves, especially telenovelas, the increased presence of brands within the narratives is apparent. In partnership with SIC/SP Televisão, Garnier produced a limited edition of a shampoo; on telenovela *Espelho D'Água*, the leading codfish brand in Portugal played a key part by helping to give shape to the theme of the codfish industry; a juice brand launched a limited edition of a strawberry/blueberry/raspberry flavor both on telenovela *Amor Maior* and in real life. This show in particular had a total of 172 active scenes with spoken references to brands and around 300 passive scenes with the presence of products (in a total of 333 episodes). On telenovela *A Impostora* (TVI), the insertion of 23 brands reportedly generated a revenue of over 790 thousand euros.<sup>4</sup>

#### 1.4. Merchandising and social merchandising

Due to the empowerment of women, gender themes were present across all networks and content, such as in the presentation of striking and inspiring characters from all social and economic backgrounds. Their problems, dilemmas and behaviors were explored and the resolutions to their drama were incisive, showing them as

<sup>3</sup> Recovered on April 2, 2018 from <http://www.marktest.com/wap/a/n/id-2357.aspx>

<sup>4</sup> Recovered on March 19, 2018 from <https://www.briefing.pt/publicidade/38359-o-soft-sponsoring-compensa-a-marktest-fez-as-contas-nesta-novela.html>

able to “be their own person”. Still, telenovela *Espelho D’Água* (SIC) is noteworthy for articulating two themes based on actual current events: the Syrian refugee crisis (the opening scene in the pilot shows the Portuguese Navy performing a rescue mission in the Mediterranean Sea) and a special episode dedicated to the Portuguese firemen, following the wildfires that took over 90 lives in Portugal in 2017. Similarly to previous years, merchandising was practically non-existent in terms of selling items used by characters or as part of the plot. SP Televisão notably sold its wardrobe for Francisca, the antagonist in telenovela *Amor Maior*, which reverted towards the Portuguese Association for Victim Support (Apav).

### 1.5. Communication policies

The main event was the initiative by the European Union to revise the Audiovisual Media Services Directive. As a document that has undergone several changes over the years in an attempt to keep up with the evolution in technology and the markets themselves, this revision seeks to, among other things, reflect over the change in the advertisement limitations. These have gone from 12 minutes per hour to 20% per day between 7 AM and 11 PM. Another goal for the revision is to consider the protection of minors against “susceptible” content that may “affect” them by applying the same rules to traditional broadcasts and on-demand services, as well as to extend the dispositions regarding European works to cover on-demand providers. They now have to ensure that European works represent at least 20% of their portfolio and afford them an adequate exposure by including this type of content in their video sharing platforms. These initiatives are to be enforced as per the Audiovisual Media Services Directive in the attempt to fight hate speech and to protect minors against harmful content.<sup>5</sup> The directive also seeks to work on updating the rules that apply to digital copyrights, with the potential to circulate content internationally.

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<sup>5</sup> Recovered on April 6, 2018 from [http://www.europarl.europa.eu/ftu/pdf/pt/FTU\\_3.6.2.pdf](http://www.europarl.europa.eu/ftu/pdf/pt/FTU_3.6.2.pdf)

## 1.6. ICT trends

The International Data Corporation (IDC) issued once more its predictions for the trends in ICTs at its annual IDC FutureScapes 2017 conference.<sup>6</sup> In the opening presentation, the continued investment in information technologies in Portugal was emphasized, which is estimated to have reached 3.6 billion euros in 2017, corresponding to a 0.9% growth from the previous year. At this conference, IDC also revealed that this increase is mostly due to more spending in third platform technologies (cloud, mobility, social business and big data), which had an estimated growth of 11.5% in 2017, and a 3% decrease in second platform technologies. According to IDC, the market for technologies associated with new “innovation accelerators”, IoT solutions, robotics, 3D printing, among others, has grown 25.4% in 2017.

On the other hand, social networks now represent an important intersection between individuals and brands. They are a place where businesses can easily and quickly interact with consumers. A survey by Marktest Consulting titled “Os portugueses e as redes sociais”<sup>7</sup>, based on 818 online interviews made between July 19 and August 7, 2017 showed that 96% of the subjects sampled have a Facebook account, which remains the preferred social network for the Portuguese, and 86.3% mention watching video content online there, placing it ahead of YouTube, which was mentioned by 75.3% of the subjects. A distant third was Instagram (25%) and only 50% of the sample stated to have an account there. Regarding the favorite type of video content in Portugal, 69% of the interviewees mentioned comedy as their preference. Music takes the second spot, followed by information video content, films/series and sports. The survey also shows that 76% of the interviewees use a smartphone to access social networks and 56% also watch TV while accessing social networks.

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<sup>6</sup> Recovered on April 4, 2018 from <http://www.portugalglobal.pt/PT/PortugalNews/Paginas/NewDetail.aspx?newId=%7B810F40EB-EC16-44ED-8463-BACFC6DF64CC%7D>

<sup>7</sup> Recovered on April 6, 2018 from <https://consumertrends.pt/portugueses-e-as-redes-sociais-2017/>

Despite the results drawn from the sample, Instagram was the social network with the biggest growth in 2017. This number corresponds to a relative increase of 35% when compared to the data from 2016, being the biggest among the most used networks. This adoption rate for Instagram is, nevertheless, very distinct from one age group to another, reaching 80.4% among young users aged 15 to 24.<sup>8</sup>

It should be mentioned that on November 6 to 9, 2017, Portugal was once again host to the Web Summit. This is one of the most important tech events globally, with an emphasis on entrepreneurship and innovation, which makes it a prominent stage for the discussion of these issues.

## 1.7. Public TV

Over the past ten years there has been a visible and significant drop in viewership for the open TV channels. Here, fictional content, namely the telenovela, remains as the most watched show and positively contributes to the performance of these channels. However, when analyzing the TV ratings surveyed by Initiative, a media agency that is part of IPG Mediabrands group, during the month of December up until the end of 2017, one can conclude that football matches were the most watched programs by Portuguese viewers of public TV.<sup>9</sup>

In its remarks for the year, this study points out that TVI once again came out ahead as the most watched generalist channel, with an accumulated share of 23.2%, followed by SIC (18.9%) and RTP1 (13.7%). When comparing with the previous year, all open TV channels showed yet again a negative variation, especially RTP1, which was able to reach a more favorable performance by broadcasting the UEFA European Championship in 2016.

If we exclude football matches, TVI's entertainment show *Pesadelo na Cozinha* was the most watched program, averaging 1.5

<sup>8</sup> Recovered on April 4, 2018 from <https://www.comunidadeculturaearte.com/instagram-foi-a-rede-social-que-mais-cresceu-em-portugal/>

<sup>9</sup> Recovered on April 4, 2018 from <http://www.meiosepublicidade.pt/2018/01/audiencias-tv-os-canais-programas-vistos-2017/>

million viewers, followed by the *Festival Eurovisão da Canção* finals, broadcast by RTP and with a historical 1.4 million viewers that watched as Portugal won the contest for the first time ever. TVI's telenovelas *A Herdeira* and *Ouro Verde* are also worth mentioning, as they were able to maintain their prime time lead throughout practically the entire year of 2017. The President's address on October 17, following the second wave of fires that devastated the country, placed fifth among the most watched segments on open TV, averaging 1.3 million viewers.

### 1.8. Pay TV

Over the last few years, pay TV channels have been gaining ground over the free-to-air channels. Still, from 2016 to 2017, the share growth from these channels as a whole was only 0.5%, with tabloid CMTV leading the chart, followed by Hollywood, SIC Notícias, Globo and Disney Channel. These had a share that varied between 2.1% and 2.7%. According to the Autoridade Nacional de Comunicações (Anacom)<sup>10</sup>, 92 out of 100 families had a subscription by the end of the third quarter of 2017. Cable provider NOS held the lead, followed by MEO, Vodafone and Nowo. On average, the monthly spending per customer was 42 euros and 93.6% subscribed to multiple play plans as the most advantageous choice. There was a 3.2% increase in subscriptions from 2016 to 2017, especially due to the fiber optic technology becoming available, which uses thinner materials and has high bitrate speeds, enabling interactivity with subscribers and HD image and sound. The channels on offer vary according to the provider. There are a few exclusive channels depending on the chosen plan: 15.5% of subscribers opted in on premium channels, which had a restricted access and required an additional payment. The video streaming on demand services had a 5.5% adoption in the third quarter of 2017, which was 2.3% over the same period in 2016. Netflix led this category over Fox Play, N Play and Amazon Prime Video.

<sup>10</sup> Recovered on April 6, 2018 from <https://www.anacom.pt/render.jsp?contentId=1423904>



### 1.9. Independent production companies

Even though the cable adoption rate was 80.4% in the beginning of 2017, there still is no legislative plan to regulate and establish requirements for every channel broadcast on cable. This has resulted in cable operators not feeling any pressure to invest domestically, unlike what has been happening with the free-to-air stations. The four big cable providers base their offering on foreign fiction channels, mostly North American, which do not contribute to the development of a self-sufficient media industry. As a result, the 27 production companies that constitute the Associação de Produtores Independentes de Televisão (Apit) are restricted to two clients, RTP and SIC, since TVI produces its own content in-house through Plural brand.

Still, the AVMS directive is currently under discussion at the European level, which may force the government to take action. Despite the impact that the sector begins to have in festivals and international sales, up until now the government has not defined any strategy. Besides, 80% of the scarce budget that the Ministry of Culture approves for the audiovisual sector has been funneled towards film production in a policy that favors authors over mass culture and demonizes TV content.

### 1.10. International trends

The year 2017 saw a new moment of conglomeration in media, marked by AT&T's purchase of Time Warner Company, which owns HBO. And Portugal was no exception, even if paling in comparison with what has happened in other markets. The attempt by French company Altice to buy Media Capital, which owns TVI, brought up issues regarding media conglomeration. Positions were taken across the political spectrum, with particular emphasis to the left-wing parties, which expressed their concern regarding the impact that it would have on consumers, on the advertisement market and even the possible dangers for the democracy. The remaining providers, such as MEO and Vodafone, and SIC were also publicly opposed to the deal, which, a year later, remains uncertain. The En-

tidade Reguladora para a Comunicação (ERC) was asked to give an official position at a delicate point, when its administration was resigning. Its deliberation regarding the deal was dubious and did not allow for the decision to be binding. The final decision was forwarded to Anacom's discretion, which remains open.

However, and regardless of whatever may be decided, we are faced with a new paradigm in which hybrid telecom companies – the so-called *telcos* – accumulate the role of distributors, backers for media projects and even content producers. The accelerated dissemination of a technology such as the internet has changed business models by giving emphasis to content – particularly fiction – as a way to increase market share in the remaining telephone and internet services.

## 2. Analysis of the year: national and Ibero-American premiere fiction

**Table 1. Fiction broadcast in 2017**  
(national and imported; premieres and reruns; co-productions)

<p><b>PREMIERE NATIONAL TITLES – 23</b></p> <p><b>RTP1 – 11</b></p> <ol style="list-style-type: none"> <li>1. <i>A Criação</i> (series)</li> <li>2. <i>A Família Ventura</i> (miniseries)</li> <li>3. <i>Caminhos da Alma – Fátima</i> (miniseries)</li> <li>4. <i>Filha da Lei</i> (series)</li> <li>5. <i>Madre Paula</i> (series)</li> <li>6. <i>Ministério do Tempo</i> (series)</li> <li>7. <i>Miúdo Graúdo</i> (series)</li> <li>8. <i>Mulheres Assim</i> (series)</li> <li>9. <i>O Sábio</i> (telenovela)</li> <li>10. <i>País Irmão</i> (series)</li> <li>11. <i>Sim, Chef!</i> (series)</li> </ol> <p><b>RTP2 – 1</b></p> <ol style="list-style-type: none"> <li>12. <i>4 Play</i> (series)</li> </ol> <p><b>SIC – 4</b></p> <ol style="list-style-type: none"> <li>13. <i>Amor Maior</i> (telenovela)</li> <li>14. <i>Espelho d'Água</i> (telenovela)</li> <li>15. <i>Paixão</i> (telenovela)</li> <li>16. <i>Rainha das Flores</i> (telenovela)</li> </ol> <p><b>TVI – 6</b></p> <ol style="list-style-type: none"> <li>17. <i>Herdeira</i> (telenovela)</li> </ol>	<p><b>PREMIERE IMPORTED TITLES – 5</b></p> <p><b>RTP1 – 1</b></p> <ol style="list-style-type: none"> <li>24. <i>Sob Pressão</i> (series) (Brazil)</li> </ol> <p><b>SIC – 4</b></p> <ol style="list-style-type: none"> <li>25. <i>A Força do Querer</i> (telenovela) (Brazil)</li> <li>26. <i>A Lei do Amor</i> (telenovela) (Brazil)</li> <li>27. <i>Novo Mundo</i> (telenovela) (Brazil)</li> <li>28. <i>Sassaricando: Haja Coração</i> (telenovela) (Brazil)</li> </ol> <p><b>RERUNS – 35</b></p> <p><b>RTP1 – 2</b></p> <ol style="list-style-type: none"> <li>29. <i>Bem-Vindos a Beirais</i> (long-running series)</li> <li>30. <i>Os Nossos Dias</i> (soap opera)</li> </ol> <p><b>RTP2 – 7</b></p> <ol style="list-style-type: none"> <li>31. <i>Alves dos Reis</i> (series)</li> <li>32. <i>Ballet Rose-Vidas Proibidas</i> (series)</li> <li>33. <i>Conde D'Abranhos</i> (series)</li> <li>34. <i>Depois do Adeus</i> (series)</li> <li>35. <i>Elsa</i> (series)</li> <li>36. <i>Liberdade 21</i> (series)</li> <li>37. <i>O Livreiro de Santiago</i> (miniseries)</li> </ol>
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18. <i>A Impostora</i> (telenovela) 19. <i>A Única Mulher</i> (telenovela) 20. <i>Jacinta</i> (miniseries) 21. <i>Jogo Duplo</i> (telenovela) 22. <i>Ouro Verde</i> (telenovela)  <b>CO-PRODUCTIONS – 1</b>  <b>RTPI – 1</b> 23. <i>Vidago Palace</i> (series) (Portugal and Spain)	<b>SIC – 10</b> 38. <i>A Família Mata</i> (sitcom) 39. <i>A Vida Privada de Salazar</i> (miniseries) 40. <i>Camilo em Sarilhos</i> (sitcom) 41. <i>Lápis Azul</i> (telefilm) 42. <i>Lua Vermelha</i> (young audience series) 43. <i>Perfeito Coração</i> (telenovela) 44. <i>Poderosas</i> (telenovela) 45. <i>Rosa Fogo</i> (telenovela) 46. <i>Sol de Inverno</i> (telenovela) 47. <i>Uma Aventura</i> (young audience series)  <b>TVI – 16</b> 48. <i>Campeões e Detectives</i> (young audience series) 49. <i>Detective Maravilhas</i> (young audience series) 50. <i>Dei-te Quase Tudo</i> (telenovela) 51. <i>Deixa que te Leve</i> (telenovela) 52. <i>Dias Felizes</i> (miniseries) 53. <i>Espírito Indomável</i> (telenovela) 54. <i>Fala-me de Amor</i> (telenovela) 55. <i>I Love It</i> (young audience series) 56. <i>Inspector Max</i> (series) 57. <i>Mar de Paixão</i> (telenovela) 58. <i>O Bando dos 4</i> (young audience series) 59. <i>O Dom</i> (miniseries) 60. <i>Ministério do Tempo</i> (series) 61. <i>Redenção</i> (telenovela) 62. <i>Sedução</i> (telenovela) 63. <i>Tempo de Viver</i> (telenovela)  <b>TOTAL OF PREMIERE TITLES: 28</b> <b>TOTAL OF RERUN TITLES: 35</b> <b>GENERAL TOTAL OF BROADCAST TITLES: 63</b>
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Source: Obitel Portugal Caem/MediaMonitor MMW/Telereport

In 2017 the fiction offer was reduced by two titles. This is a significant variation that contrasts with the 40% increase between 2015 and 2016. RTP maintained its continued offer of series and miniseries, a strategy that was set by its administration in 2015. The 13 titles that were aired were produced by a variety of production companies, authors and artistic and technical teams. Still, despite being an alternative to the telenovelas offered by the commercial channels, this diversified dynamic did not obtain significant viewership numbers and there were dissenting voices regarding the public investment. Among these products, it is worth noting the emphasis given to period dramas *Madre Paula*, *Ministério do Tempo*

and *Vidago Palace* – the latter being a co-production with Galicia (Portovago for TVG) and with the support of Instituto do Cinema e do Audiovisual (ICA) and Axencia Galega das Industrias Culturais (Agadic). SIC and TVI continued to produce telenovelas for two to three prime time fiction slots. There was a 200% increase in rerun titles (from 12 to 26) during daytime and late night, as these are clearly less relevant time slots for the stations.

**Table 2. Premiere fiction in 2017: countries of origin**

Country	Titles	%	Chapters/ episodes	%	Hours	%
<b>NATIONAL (total)</b>	<b>23</b>	<b>82.1</b>	<b>2449</b>	<b>81.7</b>	<b>1292:50:00</b>	<b>76.5</b>
<b>OBITEL COUNTRIES (total)</b>	<b>5</b>	<b>17.9</b>	<b>550</b>	<b>18.3</b>	<b>396:25:00</b>	<b>23.5</b>
Argentina	0	0.0	0	0.0	00:00:00	0.0
Brazil	5	17.9	550	18.3	396:25:00	23.5
Chile	0	0.0	0	0.0	00:00:00	0.0
Colombia	0	0.0	0	0.0	00:00:00	0.0
Ecuador	0	0.0	0	0.0	00:00:00	0.0
Spain	0	0.0	0	0.0	00:00:00	0.0
USA (Hispanic production)	0	0.0	0	0.0	00:00:00	0.0
Mexico	0	0.0	0	0.0	00:00:00	0.0
Peru	0	0.0	0	0.0	00:00:00	0.0
<b>Portugal</b>	<b>23</b>	<b>82.1</b>	<b>2449</b>	<b>81.7</b>	<b>1292:50:00</b>	<b>76.5</b>
Uruguay	0	0.0	0	0.0	00:00:00	0.0
Venezuela	0	0.0	0	0.0	00:00:00	0.0
<b>CO-PRODUCTIONS (total)</b>	<b>1</b>	<b>0.0</b>	<b>5</b>	<b>0.0</b>	<b>25:00:00</b>	<b>0.0</b>
Portuguese co-productions	0	0.0	0	0.0	00:00:00	0.0
Co-productions between Obitel countries	1	0.0	5	0.0	25:00:00	0.0
<b>TOTAL OVERALL</b>	<b>28</b>	<b>100.0</b>	<b>2999</b>	<b>0.0</b>	<b>1689:15:00</b>	<b>100.0</b>

Source: Obitel Portugal – Caem/MediaMonitor MMW/Telereport

The national offering was practically unchanged (two less titles than 2016), with an inverse variation in terms of chapter/episode numbers, which were increased by 26%. The products originating in the Ibero-American space come solely from Brazil and there were two changes from 2016: reduction in the number of titles aired by SIC (from ten to four), due to a contract renegotiation with Globo; and RTP's purchase of series *Sob Pressão* (Globo). After 20 years, the public network premiered the nine-chapter Brazilian series, on December 3, 2017 at 11 PM, a time slot that was customarily reserved for European fiction.

Table 3. Chapters/episodes and hours broadcast by time slot

Time slot	National				Ibero-American				Total			
	C/E	%	H	%	C/E	%	H	%	C/E	%	H	%
Morning (6:00-13:00)	0	0.0	00:00:00	0.0	0	0.0	00:00:00	0.0	0	0.0	00:00:00	0.0
Afternoon (13:00-20:00)	254	10.4	163:15:00	12.6	64	11.6	44:15:00	11.2	318	10.6	207:30:00	12.3
Prime time (20:00-24:00)	2182	89.1	1123:50:00	86.9	0	0.0	00:00:00	0.0	2182	72.8	1123:50:00	66.5
Night (24:00-06:00)	13	0.5	05:45:00	0.4	486	88.4	352:10:00	88.8	499	16.6	357:55:00	21.2
Total	2449	100.0	1292:50:00	100.0	550	100.0	396:25:00	100.0	2999	100.0	1689:15:00	100.0

Source: Obitel Portugal – Caem/MediaMonitor MMW/Telereport

Table 4. Formats of national and Ibero-American fiction

Format	National				Ibero-American			
	Titles	%	C/E	%	H	%	Titles	%
Telenovela	10	43.5	2295	93.7	1171:55:00	90.6	4	80.0
Series	10	43.5	142	5.8	110:30:00	8.5	1	20.0
Miniseries	3	13.0	12	0.5	10:25:00	0.8	0	0.0
Telefilm	0	0.0	0	0.0	00:00:00	0.0	0	0.0
Unitary	0	0.0	0	0.0	00:00:00	0.0	0	0.0
Docudrama	0	0.0	0	0.0	00:00:00	0.0	0	0.0
Others (soap opera, etc.)	0	0.0	0	0.0	00:00:00	0.0	0	0.0
Total	23	100.0	2449	100.0	1292:50:00	100.0	5	100.0

Source: Obitel Portugal – Caem/MediaMonitor MMW/Telereport

Prime time remains as the dominant slot to present national fiction content, which pushes Brazilian content into the late night slot. Daytime was left with telenovela *O Sábio* and miniseries *Família Ventura*, both airing on the public network. SIC aired Globo's telenovela *Sassaricando: Haja Coração* during the access to prime time slot, keeping the “sandwich” programming strategy that has been the norm since 1990: airing fiction/news/fiction.

For the first time, the number of series matched the number of telenovelas (10), which attests to the strategies undertaken by the open TV channels: RTP with the production of a rarer format and the private channels with the production of telenovelas. The high number of chapters on telenovelas, which has been ubiquitous for years, is related to the strategy defined by networks that want to chain one show after another and air more than one season over a one-year period. For the most part, Brazilian contents are telenovelas, with the exception of a medical series aired by the public network.

**Table 5. Formats of national fiction by time slot**

Format	Morn- ing	%	Af- ter- noon	%	Prime time	%	Night	%	To- tal	%
Telenovela	0	0.0	1	50.0	9	45.0	0	0.0	10	43.5
Series	0	0.0	0	0.0	9	45.0	1	100.0	10	43.5
Miniseries	0	0.0	1	50.0	2	10.0	0	0.0	3	13.0
Telefilm	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Unitary	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Docudrama	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Others (soap opera, etc.)	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
<b>Total</b>	<b>0</b>	<b>0.0</b>	<b>2</b>	<b>100.0</b>	<b>20</b>	<b>100.0</b>	<b>1</b>	<b>100.0</b>	<b>23</b>	<b>100.0</b>

Source: Obitel Portugal – Caem/MediaMonitor MMW/Telereport

Per time slot, there is a concentration of products during prime time. Traditionally, this slot has been occupied by Portuguese-speaking products – both European and Brazilian – and since 2000 by national content. These garner the most expressive ratings of all in television.

**Table 6. Time period of national fiction**

Time	Titles	%
<b>Present</b>	19	82.6
<b>Period</b>	3	13.0
<b>Historical</b>	1	4.3
<b>Others</b>	0	0.0
<b>Total</b>	<b>23</b>	<b>100.0</b>

Source: Obitel Portugal – Caem/MediaMonitor MMW/Telereport

Most stories presented take place in the present time. As they are aired on a daily basis, shows are rooted in everyday lives and explore themes that are close to consumers or, as is often the case, under public debate. The public network presented *Madre Paula*, the true story of a nun that was lover to king D. João V; *Ministério do Tempo* was an adaptation of the Spanish format *El Ministerio del Tiempo* (TVE), which revolves around a secret government agency and its adventures to prevent Portuguese historical events from being changed; and lastly series *Vidago Palace*. Miniseries *Jacinta* was produced and aired by TVI and tells the story of Jacinta Marto, one of the seers of the Holy Mary apparitions in Fátima. This title was distributed to cinema and then transposed to the small screen as a short series during the celebrations of the centenary of the apparitions in Fátima.

**Table 7. The ten most watched titles**

	Title	Country of original idea or script	Channel	Format/genre	N. of chap./ep. (In 2017)	Time slot	Rating %	Share %
1	<i>A Herdeira</i>	Portugal	TVI	Telenovela / melodrama	82	Prime time	14.3	30.
2	<i>Ouro Verde</i>	Portugal	TVI	Telenovela / melodrama	221	Prime time	13.6	28.5
3	<i>Amor Maior</i>	Portugal	SIC	Telenovela / melodrama	238	Prime time	12.8	26.8
4	<i>Única Mulher</i>	Portugal	TVI	Telenovela / melodrama	5	Night	12.6	30.5
5	<i>Paixão</i>	Portugal	SIC	Telenovela / melodrama	88	Prime time	11.7	24.3

6	<i>A Im-postora</i>	Portugal	TVI	Telenovela / melodrama	255	Night	10	25.9
7	<i>Jogo Duplo</i>	Portugal	TVI	Telenovela / melodrama	23	Prime time	9.6	26.2
8	<i>Rainha das Flores</i>	Portugal	SIC	Telenovela / melodrama	115	Prime time	8.8	24.0
9	<i>Espelho d'Água</i>	Portugal	SIC	Telenovela / melodrama	224	Prime time	8.6	23.4
10	<i>A Força do Querer</i>	Brazil	SIC	Telenovela / melodrama	168	Night	4.7	20.8
<b>Total productions: 10</b>				<b>Foreign scripts: 1</b>				
100%				10%				

Source: Obitel Portugal – Caem/MediaMonitor MMW/Telereport

**Table 7a. The ten most watched national titles**

	Title	Country of original idea or script	Channel	Format/genre	N. of chap./ep. (In 2017)	Time slot	Rating %	Share %
1	<i>A Herdeira</i>	Portugal	TVI	Telenovela / melodrama	82	Prime time	14.3	30.0
2	<i>Ouro Verde</i>	Portugal	TVI	Telenovela / melodrama	221	Prime time	13.6	28.5
3	<i>Amor Maior</i>	Portugal	SIC	Telenovela / melodrama	238	Prime time	12.8	26.8
4	<i>Única Mulher</i>	Portugal	TVI	Telenovela / melodrama	5	Night	12.6	30.5
5	<i>Paixão</i>	Portugal	SIC	Telenovela / melodrama	88	Prime time	11.7	24.3
6	<i>A Im-postora</i>	Portugal	TVI	Telenovela / melodrama	255	Night	10	25.9
7	<i>Jogo Duplo</i>	Portugal	TVI	Telenovela / melodrama	23	Prime time	9.6	26.2
8	<i>Rainha das Flores</i>	Portugal	SIC	Telenovela / melodrama	115	Prime time	8.8	24.0
9	<i>Espelho d'Água</i>	Portugal	SIC	Telenovela / melodrama	224	Prime time	8.6	23.4
10	<i>Sim, Chef!</i>	Portugal	RTP	Series/comedy	20	Prime time	4.7	9.8
<b>Total productions: 10</b>				<b>Foreign scripts: 0</b>				
100%				0%				

Source: Obitel Portugal – Caem/MediaMonitor MMW/Telereport

Regarding the country of origin for the original idea or script, the top ten for 2017 continues to follow the trend for previous years. Almost all (90%) are Portuguese, with the sole exception being *A Força do Querer*, a Brazilian telenovela.



As was the case in previous studies, the top spots in the ranking alternate between telenovelas aired by SIC and TVI. It should be emphasized that RTP's bet in *Sim, Chefi!*, which was a comedy series aired in prime time, managed to enter the list of the top ten most watched national titles, thus breaking the trend of its rivals that, for the most part, only air highly rated telenovelas during prime time or late night.

The preferred format is the telenovela, with nine shows in the top ten, and the melodrama genre remains as the most common when creating this type of narrative.

Still, despite the fact that all the shows at the top are of the same genre, there is a wide variety of stories that appeal to an increasingly diverse audience that expects from telenovelas similar narratives to short and medium term formats such as series. Elements such as action, adventure and thriller are used to capture the attention of audiences (*A Herdeira*, TVI; *Amor Maior*, SIC).

In terms of continuity, most titles here continued from 2016 onto 2017, and those airing in the middle of 2017 also continued onto 2018, which demonstrates the investment in long-running formats. On SIC and TVI we also find a preference for prime time when airing their telenovelas, with the last season of *Única Mulher* and *Impostora* pushed into late night due to a decline in viewership from one season to the next. The only foreign show in the top ten was also relegated to later hours, which is symbolic of how the investment leans towards national shows over international ones. The only ranked production that explored a different format and genre was *Sim, Chefi!*, on RTP, posing itself as an alternative type of fiction during prime time.

In 2016, similarly to previous years, the productions both on SIC and TVI continued with the strategy that had already been adopted in 2016: bumping forward in the programming the telenovela that has a longer run, regardless of the ratings reached, thus giving more emphasis to the telenovela premiering on the 9:30 PM slot and stretching it after midnight.

**Table 8. Audience profile of the ten most watched titles:  
gender, age, socioeconomic status**

Title		Channel	Gender %			Socioeconomic status %				
			Women	Men	A	B	C	D	E	
1	<i>A Herdeira</i>	TVI	60.6	39.4	1.7	10.1	14.5	42.5	31.2	
2	<i>Ouro Verde</i>	TVI	61.1	38.9	1.8	11.2	14.2	40.8	32.0	
3	<i>Amor Maior</i>	SIC	63.1	36.9	2.5	12.1	14.2	43.4	27.8	
4	<i>A Única Mulher</i>	TVI	61.8	38.2	1.0	12.1	14.4	39.0	33.5	
5	<i>Paixão</i>	SIC	63.8	36.2	2.9	13.4	15.0	40.8	27.9	
6	<i>A Impostora</i>	TVI	63.4	36.6	1.4	10.7	13.2	40.4	34.2	
7	<i>Jogo Duplo</i>	TVI	60.5	39.5	1.4	10.8	14.0	39.5	34.4	
8	<i>Rainha das Flores</i>	SIC	64.4	35.6	2.7	14.0	15.1	45.1	23.1	
9	<i>Espelho d'Água</i>	SIC	66.4	33.6	2.6	11.4	14.6	45.5	25.8	
10	<i>A Força do Querer</i>	SIC	70.0	30.0			21.0	42.0	22.0	

Source: Obitel Portugal – Caem/MediaMonitor MMW/Telereport

Title		Channel	Age group %							
			4-14	15-24	25-34	35-44	45-54	55-64	65-74	+75
1	<i>A Herdeira</i>	TVI	7.3	9.0	12.0	12.2	14.6	18.4	14.8	11.8
2	<i>Ouro Verde</i>	TVI	7.0	8.7	11.8	11.8	16.4	17.9	15.1	11.3
3	<i>Amor Maior</i>	SIC	6.2	6.0	10.0	14.2	14.5	16.3	18.1	14.7
4	<i>A Única Mulher</i>	TVI	6.5	9.0	11.4	10.6	19.2	17.3	14.6	11.5
5	<i>Paixão</i>	SIC	5.3	5.0	11.0	12.5	15.9	17.3	18.6	14.4
6	<i>A Impostora</i>	TVI	5.3	8.6	11.6	11.6	17.2	18.5	15.6	11.5
7	<i>Jogo Duplo</i>	TVI	5.7	10.0	12.0	11.7	16.3	19.6	15.2	9.5
8	<i>Rainha das Flores</i>	SIC	4.2	5.8	12.1	14.9	14.4	17.3	18.4	12.9
9	<i>Espelho D'Água</i>	SIC	4.5	4.7	11.4	13.5	15.8	16.4	20.2	13.6
10	<i>A Força do Querer</i>	SIC								

In terms of gender, women are still predominant, even though the gap between genders is becoming shorter.

According to Table 8, the age groups that watch telenovelas the most are in the 45-75 range. Nevertheless, *A Herdeira* (TVI) was the

telenovela that, by virtue of having a main cast that was very young, managed to capture younger age groups, namely in the 15-35 range.

In terms of socioeconomic status, most viewers in segments A and B lean towards fictions aired by SIC and RTP, while watchers in segments C, D and E prefer SIC and TVI. However, and similarly to previous years, viewers from segments D and E on both networks are the ones who watch telenovelas the most, with numbers far superior to the remaining segments.

### 3. Transmedia reception

Even though fiction is still the most searched television product on the digital platforms made available by the Portuguese generalist channels, an effective transmedia reception where telenovelas are “adapted” for the internet and other supports has yet to be fully explored (Jenkins, 2009; Fachine, 2014).

Over the years that this research has taken place, it has become clear that fan interaction with their favorite television products remains limited to comments made on digital platforms, Facebook being the most used social network for audiences to participate and for the network to release information. These comments almost always express an emotional investment and the topics are relative to how the story is unfolding, the production quality and the content. However, in 2017 there was, for the first time, a truly digital transmedia occurrence, with *Amnésia*.

Portuguese production company beActive<sup>11</sup>, which specializes in developing and implementing television content solutions for new media such as mobile and online, presented in conjunction with RTP Lab the first interactive series with the combined use of RTP Play platform, YouTube and Instagram. Based on the conceptual format from Instagram’s Stories, this 12-episode thriller tells the story of Joana Almeida, a successful young blogger that, on the

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<sup>11</sup> beActive is an independent production company created by Nuno Bernardo in 2003 and devoted to the production of transmedia-based audiovisual content (e.g. *Diário de Sofia*, *Collider*, *Final Punishment*). Cf. <http://beactivemedia.com/>

morning when her first novel is to be published, wakes up with her boyfriend, Carlos, lying dead by her side. The series was written by Nuno Bernardo and Patrícia Brásia and follows the struggle by the protagonist to prove her innocence through small narratives on a mysterious Instagram account that posted photos, videos and recordings daily. These enabled viewers to reconstitute the past and the relationship between Joana and her boyfriend, but the posts expired 24 hours later. According to the network and the director<sup>12</sup>, this concept of telling the “tale” in a new framing (Instagram Stories are recorded on a vertical aspect ratio, rather than the horizontal used by TV) with a new type of editing, different pacing, colloquial language and closer to the audience enabled to bring the narrative closer to a younger audience and explore a new way to tell a fictional story that allowed for a transmedia reception never tried before.

This was RTP’s first entirely digital series to be followed on Instagram and was chosen by The WIT to be included in the selection “Fresh TV Around the World” for Mipcom in Cannes on October 16 to 19, 2017, where the best fiction programs produced during the previous year are presented.

#### 4. Highlights of the year

The national fiction on offer by the free-to-air channels remained steady during 2017, with no surprises in terms of ratings or audience buzz. Still, there are three noteworthy areas and potential trend indicators: genres and themes; nominations and awards; on-line strategies.

##### *Genres and themes*

RTP reinforced its investment in period series that were produced exclusively for TV with *Madre Paula*, *Ministério do Tempo* and *Vidago Palace*. This was a genre that went away from the small

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<sup>12</sup> Recovered on April 4, 2018 from <https://www.publico.pt/2017/10/30/culturaipsilon/noticia/amnesia-a-primeira-serie-totalmente-digital-da-rtp-estreiase-esta-segunda-feira-1790742>

screen since *Depois do Adeus* (2013). *Jacinta*, the miniseries produced by TVI about seer Jacinta Marto, completed the offering for period and historical dramas, which amounted to almost 18% of the total offering for fiction. The practice of resorting to prominent individuals and past events in television fiction – namely in series, miniseries and biopics – has been irregular. RTP leads this type of offering due to its charter as a public service and the privileged access that it has to image archives. Generally speaking, these are products with low ratings, but with the accomplishment of having conquered a favorable public opinion and winning a few national and international awards.

The narrative themes that were explored by telenovelas in 2017 were similar to those in previous years: jealousy, betrayal, revenge, hidden or stolen identities and their revelation, love gained and lost, and class struggle. Due to the variety of genres in the series that were produced and aired by RTP, the themes explored were diverse, namely the police procedural (*A Filha da Lei*), the backstage of professional fields (*A Criação*, *País Irmão*, *Sim*, *Chef!*), the confrontation with one's own self and past family conflicts (*Família Ventura*, *Miúdo Graúdo*), women's lives and inner conflicts (*Mulheres Assim*, *Fátima – Caminhos da Alma*). Female empowerment was, in fact, at the same time a narrative and social theme that was used by almost all shows, as evidenced by the presence of strong, determined and even bold characters, able to endure hardships, to actively react and assume identities (e.g. telenovela *Jogo Duplo*, TVI). Some issues have caused a stir on social media while, at the same time, mirroring public debates, such as the public consultation regarding The National Strategy for Equality and Non-Discrimination 2018-2030, with the purpose of defining specific measures for gender equality, prevention and fight against domestic violence towards women as well as discrimination based on sexual orientation. Another example was the discussion on the Law of Parity, which resulted in proposed changes that came to be approved in a Ministry Council in 2018 (change in the minimum gender-based quota on electoral lists from

33% to 40% and a balanced representation of department heads in public administration).

The concern in addressing social themes has been a constant element of television fiction products in recent years, particularly on daily broadcast products, with awareness campaigns to seek medical advice and cope with illnesses; rape and the restitution of basic human rights; crime, offences and punishment. Concurrently to these themes, the two most ambitious projects by TVI – *Única Mulher* and *A Herdeira* – stand out: the former by exploring racism and the relationship between Portugal and its former colony of Angola; the latter by focusing on the gipsy community and addressing the illegal drug trade. These two telenovelas, as well as their predecessor, *Ouro Verde*, along with *Amor Maior*, SIC's telenovela produced by SP Televisão, uncovered a new thematic segment for daily prime time fiction: violence. Without giving up their melodramatic essence, Portuguese telenovelas began to explicitly show scenes of physical and psychological violence, akin to the narco and noir styles, which are characteristic of other formats such as the police thriller in North American and Latin American series. Despite the *criticism*, especially on social media, these telenovelas performed highly in terms of ratings.

### *Nominations and awards*

The year 2017 saw several nominations and awards attributed both nationally and internationally. Of particular note were: *Madre Paula* (RTP1), which won a Sophia award, a recognition attributed by Academia Portuguesa de Cinema, in the category of best television series; *Amor Maior* (SIC/SP Televisão), which won the bronze medal for telenovela at the New York Festival's World Best TV and Films, and the award for best telenovela on French television<sup>13</sup> at the Soap Awards France 2018, where products around the world are recognized; *Espelho d'Água* (SIC/SP Televisão), which is nominated

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<sup>13</sup> *Amor Maior* was sold to France, where it is aired on Télé 7 under the title *Au Nom de l'Amour*.

for the Rookie Awards, at the Banff World Media Festival (Canada), for best melodrama, going against *Grey's Anatomy* (ABC Studio), *The Good Doctor* (Sony Pictures), *O Rico e Lázaro* (Record TV Europa) and *Unit 9* (Aetios Production). Finally, the Portuguese Society of Authors awarded telenovela *Ouro Verde* (TVI) with the prize for best television program at Prémios Autores. This was the first time in seven years that a telenovela won the award over RTP's series. In a year when the public network attempted to consolidate its strategy to offer series, one would expect that the award should go to them once more. Therefore, this could be an indication that the quality of telenovelas is being recognized by the elites, as well as a public perception that may be changing.

### ***Online strategies***

Over the past few years, the networks and channels have failed to present a cohesive online strategy. Creating Facebook pages without much interaction or upkeep, uploading content on their official websites after it has aired on TV, or having a pay-per-view access for some episodes out of a whole telenovela proved to be initiatives with no correlation with the possibility of changing the fictional dynamic online, something that other markets are taking strides in. This is the case for the Brazilian market, one that in Portugal is seen as a reference in this regard. Years of transition culminated in 2016 and especially in 2017 with the development of streaming platforms and the production of entirely digital content for on demand consumption – a theme that is further explored as follows.

## **5. Theme of the year: TV fiction on video on demand platforms**

As was pointed out in the transmedia analysis, the transfer of television content onto a digital environment is still a process that Portuguese networks have pursued very little. Only in the last few years have they considered the digital sphere and its multiple platforms to be an equally interesting stage for developing fictional narratives and obtaining audience.

When, in previous studies, Facebook stood out as the only relevant network to spread information and interact with audiences, the emergence of other technological platforms has allowed channels to rethink their presence in the digital universe by orienting their production in terms of a new creative field. The search after an audience that strayed away from the television universe and the new ways that information and entertainment are consumed completely changed the platform for media production, distribution and consumption. This has generated a perfect environment for the emergence of new production and reception trades, from different narratives to even new businesses that were formed.

Even though this presence is still minimal in Portugal, there is a clear digital vision in the more recent productions, as is the case with the structure created by Media Capital Digital, which holds TVI channel and TVI Player, an innovative digital platform created in 2015 and with multiple awards as well as national and international recognition. Through it, viewers can freely access content aired on TVI anywhere in the world and there has been an increased interest in creating alternative and exclusive contents that expand on many shows and entertainment program that air on TVI. The group is also present in other businesses related to the media sector, such as the production of content for TV, something that is provided by multinational company Plural Entertainment.<sup>14</sup> However, despite the effort already being made by other channels in expanding to more complementary or transmedia narratives, the awareness to how important having a digital presence is only became more expressive on public network RTP, with platform RTP Play, which has made a significant effort in producing new and specific content within fiction for the digital platform.

With RTP Play, the network's streaming platform, the public channel became accessible everywhere and, through the corre-

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<sup>14</sup> Recovered on April 4, 2018 from <http://www.mediacapital.pt/p/472/media-capital,-a-construir-o-futuro/>



sponding application, it became possible to tune in to live TV and radio broadcast, as well as to watch again past programs in full. Going beyond the accessibility aspect, RTP Play's irreverence also came through on the content itself. It is the only digital platform owned by a Portuguese channel that creates specifically different and exclusive content that either complements or simply exists on its own in isolated fiction narratives.

RTP Lab is a good example of this. It is a creative and experimental incubator, with new ways to produce contents that are conceived with a multiplatform structure in mind. Consequently, the content that was created was geared towards all audiences and attempted to find fiction and comedy genres that would use new types of narratives in an exclusively digital environment.<sup>15</sup> Resulting from this creative and experimental incubator came the first webseries from the public station: *Amnesia*, *#CasaDoCais*, *Subsolo* and *Ap-paixoados*. These series are similar in every way to what airs on RTP's channels, but with an exclusive premiere on YouTube and RTP Play.<sup>16</sup> These three exclusively digital products are RTP's first forays of this kind – series that have a younger target audience that is accustomed to consume content online. *Amnésia* was made available still in 2017 as a “dizzying police thriller”, while the remaining productions were only scheduled for January and February, 2018, which attests to the continued efforts to invest on digital content as the future platform where alternative content is produced. Still within the scope of RTP's endeavors, the simultaneous premiere of series *Criação* both on TV and RTP Play stands out for its availability in full, enabling binge watching.<sup>17</sup>

The on-demand content offer, be it in full or not, is also made by the OTTs. The first streaming platform to appear in the national market was NPlay. It was created in September 2015, three weeks

<sup>15</sup> Recovered on April 4, 2018 from <http://media.rtp.pt/extra/estreias/rtp-lab-nova-aposta-conteudos-digitais/>

<sup>16</sup> Recovered on April 4, 2018 from <https://shifter.pt/2017/12/casadocais-rtp-lab/>

<sup>17</sup> To watch more than one episode/chapter in a row.

before Netflix's kick-off, and is offered exclusively to subscribers of telecom provider NOS. It has a significant number of series and feature films, particularly those from international channels that highly sought after in Portugal, such as HBO, Sony and Fox. Then, in October, 2015, Netflix appeared. Its promise of providing an extended offering proved to be lacking – 1500% below the total offering available on the platform and 700% below the United States offering.<sup>18</sup> Still, as mentioned above, the data for 2017 place adoption rates at 5.5%, showing signs of increasing. A survey made by Netflix<sup>19</sup> regarding consumption habits for their subscribers showed that, in 2017, Portuguese viewers chose family content during the morning hours (7 AM-10 AM). During lunchtime the consumed contents with more expression are drama and horror. At dinner time, Portuguese audiences prefer thrillers; and documentaries, at night. The five most watched shows in 2017 were *Friends*, *Narcos*, *Orange is the New Black*, *Gilmore Girls* and *Suits*.

The original Portuguese production for Netflix is materialized with a stand-up comedy titled *Na Ponta da Língua*, by comedian Salvador Martinha. The remaining available contents are telenovelas, series and telefilms from private network SIC and some feature films by Portuguese directors. In 2016, the offer for “pure” OTTs grew with the kick-off of Amazon Prime Video. With its own production and catalogue, it is currently seen as the least appealing to national audiences.

When faced with this, it is understandable that the national television providers are starting to delineate a solid digital strategy for the first time, not only by making content available, but also by producing their own content online, as well as creating in-company departments dedicated to the field. Therefore, in the next few years the production in Portugal is expected to increase along with the

<sup>18</sup> Recovered on April 13, 2018 from <https://pplware.sapo.pt/informacao/netflix-portugal-e-o-pais-europeu-com-menos-oferta-de-conteudos/>

<sup>19</sup> Recovered on April 13, 2018 from <https://mag.sapo.pt/tv/atualidade-tv/artigos/do-pequeno-almoco-ao-jantar-o-que-veem-os-portugueses-na-netflix>

distribution channels and, consequently, to gain ground on other markets with finished products or original scripts.

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## SPAIN: INNOVATION AND HYBRIDIZATION OF GENRES AND FORMATS

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### **1. Spain's audiovisual context in 2017**

The growing role of telecoms and international platforms, both in production and distribution of content, exacerbates competitiveness and stimulates the renovation of genres and formats, in a context in which the fragmentation of the audience leads traditional networks to create new alliances and use second screens. As phone bundles offer video on demand (VoD) platforms, fiction (film and television) has become one of the appealing features of pay television.

The impulse experienced by intrigue genres (thriller and crime) reverts in the reduction of comedy and period fiction, increasing the number of productions set in the present. The series reaffirms its dominance in TV programming at the expense of miniseries and telefilms, while new releases have cut down the number of episodes per season. The weighted annual audience index of the three large generalist networks reaches a new historical minimum (36%), as a consequence of an increasingly diversified television offering. The themes channels introduced during the last concession distribution increase their share, while pay television maintains its sustained growth. In the midst of the multiplicity of screens, viewers continue to demonstrate an enormous dedication to conventional television,

and consumption has increased for the first time since 2012. Advertising investment also increases, albeit discreetly, and maintains the upward trend initiated in 2014.

### 1.1. Open television in Spain

Ratings of public television experience a slight improvement after reaching rock bottom in 2015, while private channels suffer due to the increasing VoD offering.

**Chart 1. Open TV networks in Spain<sup>1</sup>**

Reach	Public		Private	
	First channel	Second channel	First channel	Second channel
<b>State<sup>1</sup> (national coverage)</b>	La1	La2 24H Clan Teledeporte	Antena3, Tele5, Cuatro, LaSexta	FDF, Neox, Atré-series, Divinity, Nova, Mega, Trece, DMax, Energy, Paramount Channel, Boing, Disney Channel, DKiss, Be Mad TV, Ten, Gol, Real Madrid HD
<b>Autonomic (regional coverage)</b>	TV3, TVG, C. Sur, ETB2, CMM, TV-CAN, Telema-drid, ETB1, Aragón TV, La7 TV, Canal Ext. TV, TPA, IB3	Super3/33, 3/24, TV3CAT, Esport3, CSur-And, And-TV, Galicia TV, TVG2, IB3 Global, ETB3, ETB4, LaOtra, TPA2	8Madrid, 8TV, CYL7, La8, RAC105, TV Mediterráneo, V Televisión	

Source: Obitel Spain

TV consumption grows after four years of decline and stands at 240 minutes per viewer and day, which is the third best historical record since 1992<sup>2</sup>, after 246 minutes in 2012 and 244 in 2013. Tele5 (13.3%) is the most watched network for the sixth consecutive year, despite being the generalist that loses the most audience

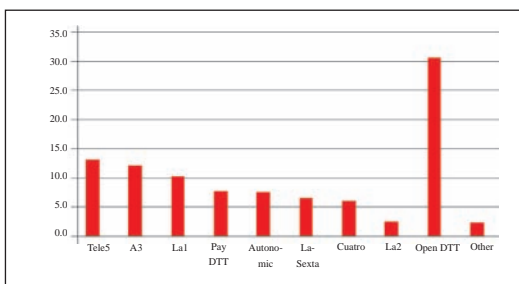
<sup>1</sup> Translator note: In the Spanish case, “state coverage” or “national coverage” refers to networks that reach the whole country, while “autonomic coverage” refers to networks with regional coverage of their own autonomic communities. Both autonomic and state networks include public and private ownership.

<sup>2</sup> First year when information about TV viewers’ behavior becomes available in Spain.

rating points compared to 2016 (1.1 point) and despite leading with the lowest historical annual rate since 1992. Antena3 follows with five tenths less than last year (12.3%), while TVE (10.4%) is the only one of the three major state networks that grows in 2017 (three tenths).

**Graph 1. Share by state networks**

Network	%
Tele5	13.3
A3	12.3
La1	10.4
Pay DTT	7.8
Autonomic	7.6
LaSexta	6.7
Cuatro	6.1
La 2	2.6
Open DTT	30.8
Other	2.4
<b>TOTAL</b>	<b>100</b>



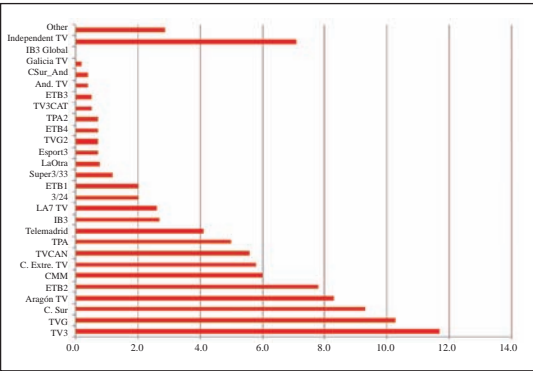
Source: Barlovento Comunicación/KantarMedia

Autonomic networks' average share (7.6%) increases for the first time after experiencing a sustained decline since 2004. TV3 (11.7%) is, once again, the channel within this group with the highest audience share, three tenths more than in 2016, and the one most watched in its autonomous community. TVG (10.3%) and CanalSur (9.3%) also show signs of improvement.

**Graph 1a. Share by autonomic networks**

Network	%
TV3	11.7
TVG	10.3
C. Sur	9.3
Aragón TV	8.3
ETB2	7.8
CMM	6.0
C. Extre. TV	5.8
TVCAN	5.6
TPA	5.0
Telemadrid	4.1
IB3	2.7

LA7 TV	2.6
3/24	2.0
ETB1	2.0
Super3/33	1.2
LaOtra	0.8
Esport3	0.7
TVG2	0.7
ETB4	0.7
TPA2	0.7
TV3CAT	0.5
ETB3	0.5
And. TV	0.4
Csur_And	0.4
Galicia TV	0.2
IB3 Global	0.0
Independent TV	7.1
Other	2.9
<b>TOTAL</b>	<b>100</b>



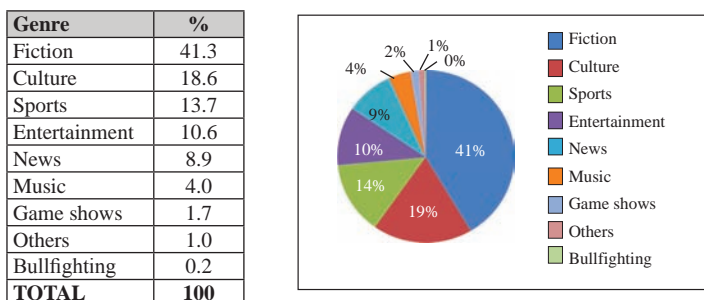
Source: Barlovento Comunicación/KantarMedia

Mediaset (28.7%) holds, one more year, the leadership by business groups, although it drops 1.5 points. Atresmedia (26.5%) loses six tenths and CRTVE (16.7%) one. The two smaller groups, Vocento (3.1%) and Unidad Editorial (2.7%), experienced an increase of two and five tenths respectively.

Consumption of pay television (22.3%) reaches an annual historical maximum thanks to more than 6.4 million households subscribed to any of the modalities offered.<sup>3</sup> The five most viewed channels are Bein Liga (6.5%), Fox (5.8%), TNT (4.7%), AXN (3.7%) and Canal Hollywood (3.5%).

Time dedicated to each genre follows a very similar pattern to last year's. Fiction (41.3%) falls one tenth, but continues to lead the Spanish programming, especially among pay television (52.4%). Cultural programs (18.6%) and sports (13.7%) increase, while entertainment (10.6%) and information (8.9%) continue their downward trend and are displaced to fourth and fifth place, respectively.

<sup>3</sup> Data from the National Market and Competitiveness Commission (CNMC). Available at: [http://data.cnmc.es/datagraph/jsp/inf\\_trim.jsp](http://data.cnmc.es/datagraph/jsp/inf_trim.jsp)

**Graph 2. Offer by genre in TV programming**

Source: Barlovento Comunicación/KantarMedia

## 1.2. Audience trends in 2017

Digital terrestrial television (DTT) (77.1%) continues to be the main distribution system for television content in Spain, followed by cable (10.2%), IPTV (9.2%) and digital satellite (2.9%), as it was the case in 2016. However, the increase of the second has significantly reduced the distance between these two last modalities in 2017.

Tele5 remains the preferred network among women, and scores high in the age groups 13 to 44 and 64+. Men are faithful to Antena3, and the network obtains good results among viewers in the age range 45-64. Also, 46% of Spaniards watch television alone, a figure in line with the increased viewing on mobile devices; 37% with another person and 17% in group.

Soccer is, once again, the star of Spanish television, with 38 of the 50 most watched broadcasts of the year. The only Spanish fiction in this ranking is the premiere of thriller *La Casa de Papel* (Antena3), with 4,354,000 viewers and 25.4% share, located in position 49.

## 1.3. Advertising investments of the year: in TV and in fiction

Advertising investment increases for the fourth consecutive year, although only by 1.8%. Television, the medium with the highest turnover, experienced a growth of 1% (2,143.3 million euros). Investment in the internet continues its upward trend (+10%, 1,548.1



million), while press investments have fallen drastically (−8.1% and 567.4 million euros). Mediaset (+0.9% and 927 million euros) and Atresmedia (−0.7% and 887 million euros) accumulate 84.6% of the total investment.<sup>4</sup>

#### 1.4. Merchandising and social merchandising

Spanish fiction continues to explore different options for promotion and business beyond the small screen. TVE compensates the absence of commercial advertising with transmedia resources, mainly from *El Ministerio del Tiempo*, expanded with a new virtual reality experience (*Salva el Tiempo*) and its first board game, developed by Óscar Arévalo. *La que se Avecina* (Tele5) released its own edition of Monopoly, the first version of a national series of the popular game. *Sé Quién Eres* (Tele5) has expanded its story in the form of a novel, with *La Última Palabra de Juan Elías*, by Claudio Cerdán.

At the regional level, *Go!azen* (ETB1) maintains a promotion strategy based on the performances of its actors. In a festive celebration on the eve of the International Day for the Elimination of Violence against Women, the young people of the series performed along a thousand children the song *DenokZu*, created by the Provincial Council of Gipuzkoa in collaboration with *Go!azen*, to raise awareness among young people. The series also became the focus of a campaign promoted by ETB and the Department of Culture and Linguistic Policy of the Basque Government aiming to promote the Basque language.

#### 1.5. Communication policies

In 2017, the states of the European Union closed the deal to coordinate cross-border frequencies and avoid interference, the first step towards the second digital dividend. The complete allocation of

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<sup>4</sup> Data from Infoadex report. Available at <http://www.infoadex.es/home/2018/02/cuarto-ano-de-crecimiento-de-la-inversion-publicitaria-con-el-18-de-incremento-observado-en-2017/>

the 700 MHz frequency band for fifth generation digital communications, approved by the European Commission, involves a reordering of the European radio spectrum that must be completed by June 30, 2020.

## **1.6. ICT trends**

In May, the X wave of the report on technological impact of audiovisual consumption revealed that 49% of Spanish homes had at least one smartTV, mostly with standard HD quality. Therefore, 4k and HDR options are still a minority. The report also notes the increase in audiovisual consumption on smartphones, with an average of four hours a week per user.<sup>5</sup>

On October 30, RTVE launched its digital platform, Playz, a new online offering that focuses on new creators, young audiences and interactivity. A day after Playz premiered, RTVE started HD broadcasts for La2 and Clan, seven years after La1. Access to Clan HD was simultaneous for all coverage areas in Spain, while the launch of La2 HD was staggered as a consequence of its territorial character and regional disconnections.

## **1.7. Open TV (public and private)**

Despite the deceleration of advertising investment, the two large business groups declared higher profits in 2017. Thus, Atresmedia closed 2017 with a net profit of 142.1 million euros, 10% more than in the same period last year<sup>6</sup>; while Mediaset had 197.5 million euros in profit, a 15.5% more than in 2016.<sup>7</sup> Atresmedia strengthened its position in the market with the acquisition of 94.8%

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<sup>5</sup> Data from 2017 report by The Cocktail Analysis. Available at <https://www.audiovisual451.com/wp-content/uploads/PDF-1.pdf>.

<sup>6</sup> Data from the National Market and Competitiveness Commission (CNMC). Available at: [http://www.atresmediacorporacion.com/accionistas-inversores/informacion-economico-financiera/resultados/atresmedia-vuelve-batir-record-historico-facturacion-ingresos-netos-10521-millones-euros\\_201802285a96fcbf0cf2552830bb810f.html](http://www.atresmediacorporacion.com/accionistas-inversores/informacion-economico-financiera/resultados/atresmedia-vuelve-batir-record-historico-facturacion-ingresos-netos-10521-millones-euros_201802285a96fcbf0cf2552830bb810f.html)

<sup>7</sup> Data from the National Market and Competitiveness Commission (CNMC). Available at: [https://www.mediaset.es/telemania/empresas/empresas-nacionales/resultado-beneficio-Mediaset-Espana-lider-audiovisual\\_0\\_2522625883.html](https://www.mediaset.es/telemania/empresas/empresas-nacionales/resultado-beneficio-Mediaset-Espana-lider-audiovisual_0_2522625883.html)

of company Smartclip, one of the leading marketers of digital advertising in the Spanish market, and the creation of Atresmedia Studios, a company dedicated to the creation of exclusive fiction content for new national and international operators. Thus, the group consolidated a collaboration model with the payment platforms that it has already experimented with co-production, the cession of brands and the agreements to broadcast its productions on other platforms.

Mediaset continues to participate in production by creating Alea Media (with Aitor Gabilondo), an exclusive provider of fiction content. It is a formula previously used by the group on their entertainment formats, aimed at reducing costs and better adjusting to their own rhythms.

## 1.8. Pay TV

This year has witnessed the consolidation of paid platforms that absorb an increasing number of viewers and dramatically upset the results of the generalist networks. In the second quarter, its revenue grew by almost 15%<sup>8</sup> and, during the first semester, the number of households without paid platforms went from 88% to 77%, which implies that one in four households is already subscribed.<sup>9</sup> Movistar+ continues to be the leading platform (13% of homes with internet access), but Netflix and HBO are growing very fast. The first has doubled its number of users (1,163,000 households and 7.3%) in just six months (between December 2016 and June 2017). By June 2017 HBO had accumulated about 414,000 (2.6%).

In 2017, after the consolidation of Netflix and HBO, two new operators arrived to Spain: Amazon Prime Video and Sky. But in contrast, pay TV has lost Los40tv, after almost 20 years on air.

Although the pay TV channels had already produced their own fiction (Lacalle, 2012), the true drive for this type of business did

<sup>8</sup> Data from the National Market and Competitiveness Commission (CNMC). Available at: <https://www.cnmc.es/node/366797>

<sup>9</sup> Data from the National Market and Competitiveness Commission (CNMC). Available at: <https://blog.cnmc.es/2017/11/17/panel-de-hogares-cnmc-el-video-en-streaming-co-ge-el-vuelo-1-de-cada-4-hogares-con-internet-ya-lo-utilizan/>

not arrive until 2017. Unlike Netflix, HBO, Disney and Movistar +, Amazon Prime Video has not yet begun producing its own Spanish shows, but it has shown its interest in national fiction by signing an agreement to buy more than 30 Spanish series from Antena3, Tele5 and TVE.<sup>10</sup>

### 1.9. Independent producers

In 2017 stand out the mergers of companies that aspire to become the reference in the Spanish market. The first, announced by Zebra Producciones and Veralia Contenidos, has resulted in the creation of iZen Producciones, an audiovisual group that integrates all brands from both companies, including Boca a Boca, Europroducciones, Hill Valley, Proima Zebrastur and Zebra. Months later, DLO Producciones and Magnolia TV communicated their merger and the creation of DLO Magnolia, led by José Manuel Lorenzo. Finally, the Secuoya Group announced its expansion through Latin America, a strategy with which the group pursues its consolidation in Colombia, Chile, Peru, Mexico and Miami.

### 1.10. International trends

Various international alliances are also at play in the process of expansion conducted by the Spanish television system. Thus, Mediaset has premiered its first international co-production recorded in Spanish, *Supermax*, along with Globo, TV Azteca, Teledoce and Televisión Pública Argentina. RTVE has also participated, along with BBC, in the production of *Reinas*; while Portocabo has produced *Vidago Palace* for the public television in Galicia and Portugal. This year also premiered the first co-production between Andalusia and Mexico, *Entreolivos*, a collaboration between Entreolivos Fiction Company and Caribbean Films.

Spanish fiction continues its internationalization process in 2017 with the adaptations of *Cuéntame un Cuento* (Antena3) and

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<sup>10</sup> See [http://vertele.eldiario.es/noticias/Amazon-Prime-Video-principales-TV\\_0\\_1969003093.html](http://vertele.eldiario.es/noticias/Amazon-Prime-Video-principales-TV_0_1969003093.html)

*Gran Hotel* (Antena3) for CBS All Access and ABC respectively; and the purchase of *Vis a Vis* format by BBC and *Cuéntame Cómo Pasó* in Argentina. In parallel, other productions in original version continue to cross borders: *Velvet* (Antena3) triumphs in Belgium and *Pulsaciones* (Antena3) will be released in the United States and the United Kingdom by Channel 4 and Global Series Network, on its VoD platform Walter Presents.

## 2. Analysis of the year: national and Ibero-American premiere fiction

In 2017 there have been 37 releases of Spanish fiction, five more than in 2016. As in previous years, La1 is the network with the largest number (14 titles), followed by Antena3 (seven titles), Tele5 (six titles<sup>11</sup>) and Cuatro (two titles). The eight titles premiered by pay TV channels (#0, Disney, HBO and Netflix) reflect the momentum of VoD offerings.

**Table 1. State fiction broadcasted in 2017**

<b>PREMIERE STATE TITLES – 37</b>	<b>HBO – 1 state title</b>
<b>La1 – 14 state titles</b>	36. <i>Supermax</i> (series)
1. <i>Acacias 38</i> (serial)	<b>Netflix – 1 state title</b>
2. <i>Centro Médico</i> (serial)	37. <i>Las Chicas del Cable</i> (series)
3. <i>Cuéntame Como Pasó</i> (series)	<b>RERUN TITLES – 23</b>
4. <i>El Final del Camino</i> (series)	<b>La1 – 4 state rerun titles</b>
5. <i>El Ministerio del Tiempo</i> (series)	38. <i>El Ministerio del Tiempo</i> (series)
6. <i>Estoy Vivo</i> (series)	39. <i>Olmos y Robles</i> (series)
7. <i>iFamily</i> (series)	40. <i>Ángeles</i> (series)
8. <i>La Princesa Paca</i> (telefilm)	<b>Antena3 – 3 state rerun titles</b>
9. <i>Reinas</i> (series)	41. <i>Allí Abajo</i> (series)
10. <i>Seis Hermanas</i> (serial)	42. <i>La Casa de Papel</i> (series)
11. <i>Servir y Proteger</i> (serial)	43. <i>Tiempos de Guerra</i> (series)
12. <i>Si Fuieras Tú</i> (series)	<b>Tele5 – 3 state rerun titles</b>
13. <i>Traición</i> (serial)	44. <i>Ella Es Tu Padre</i> (series)
14. <i>La Peluquería</i> (series)	45. <i>La que se Avecina</i> (series)
<b>Antena3 – 7 state titles</b>	
15. <i>Allí Abajo</i> (series)	

<sup>11</sup> In April, Tele5 aired a short of *La que se Avecina*, programmed to boost the reruns of this incombustible comedy, as the tenth season would not be released until October.

16. <i>Amar es para Siempre</i> (serial) 17. <i>El Incidente</i> (series) 18. <i>El Secreto del Puente Viejo</i> (serial) 19. <i>La Casa de Papel</i> (series) 20. <i>Pulsaciones</i> (series) 21. <i>Tiempos de Guerra</i> (series)  <b>Tele5 – 5 state titles</b> 22. <i>El Accidente</i> (series) 23. <i>Ella Es Tu Padre</i> (series) 24. <i>La que se Avecina</i> (series) 25. <i>La que se Avecina I</i> (short) 26. <i>Perdóname, Señor</i> (series) 27. <i>Sé Quién Eres</i> (series)  <b>#0 – 4 state titles</b> 28. <i>Conquistadores</i> (series) 29. <i>Velvet Collection</i> (series) 30. <i>Vergüenza</i> (series) 31. <i>La Zona</i> (series)  <b>Disney – 2 state titles</b> 32. <i>Coco &amp; Lana</i> (series) 33. <i>C.R.A.K.S</i> (series) 34. Cuatro – 2 state titles 35. <i>Grupo 2 Homicidios</i> (series) 36. <i>Gym Tony</i> (serial)	46. <i>Perdóname, Señor</i> (series)  <b>Cuatro – 1 state rerun title</b> 47. <i>Gym Toni</i> (serial)  <b>Neox – 1 state rerun title</b> 48. <i>Aquí no Hay Quien Viva</i> (series)  <b>#0 – 1 state rerun title</b> 49. <i>Vergüenza</i> (series)  <b>Atreseries – 3 state rerun titles</b> 50. <i>Allí Abajo</i> (series) 51. <i>Pulsaciones</i> (series) 52. <i>Velvet</i> (series)  <b>Netflix – 8 state rerun titles</b> 53. <i>Mar de Plástico</i> (series) 54. <i>El Ministerio del Tiempo</i> (series) 55. <i>La Embajada</i> (series) 56. <i>Bajo Sospecha</i> (series) 57. <i>Cuatro Estaciones en La Habana</i> (series) 58. <i>Pulsaciones</i> (series) 59. <i>La Casa de Papel</i> (series) 60. <i>Merlí</i> (series)  <b>TOTAL PREMIERE TITLES: 37</b> <b>TOTAL RERUN TITLES: 23</b> <b>TOTAL BROADCASTED TITLES: 60</b>
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Source: Obitel Spain

The regional channels offer the same number of titles as last year (21), which brings the Spanish total to 58. Ten of the premieres have been aired on the Galician TVG and five on the Catalan TV3.

**Table 1a. Autonomic fiction broadcasted in 2017**

<b>PREMIERE AUTONOMIC TITLES – 19</b>  <b>ETB1 – 1 autonomic title</b> 1. <i>Go!azen</i> (series)  <b>IB3 – 2 autonomic titles</b> 2. <i>Mai Neva a Ciutat</i> (series) 3. <i>Treufoc</i> (series)	<b>RERUN TITLES – 15</b>  <b>Canal33 – 2 autonomic titles</b> 20. <i>La Riera</i> (serial) 21. <i>Com si Fos Ahir</i> (serial)  <b>Aragon TV – 1 rerun title</b> 22. <i>Los Artigas</i> (series)
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<b>TV3 – 5 autonomic titles</b> 4. <i>El Crak</i> (series) 5. <i>Nit i Dia</i> (series) 6. <i>La Riera</i> (serial) 7. <i>Com si Fos Ahir</i> (serial) 8. <i>Merlí</i> (series)  <b>TVG – 10 autonomic titles</b> 9. <i>Augasquentes</i> (series) 10. <i>Casa Manola</i> (series) 11. <i>Dalia, a Modista</i> (miniseries) 12. <i>Era Visto</i> (sketch) 13. <i>Fontaalba</i> (serial) 14. <i>Pazo de Familia</i> (series) 15. <i>Serramoura</i> (series) 16. <i>Tac</i> (series) 17. <i>Vidago Palace</i> (series) 18. <i>Viradeira</i> (series)  <b>Canal Sur – 1 autonomic title</b> 19. <i>Entreolivos</i> (series)	<b>CTM – 2 autonomic titles</b> 23. <i>El Faro</i> (serial) 24. <i>Dalia, a Modista</i> (miniseries)  <b>TVCanarias – 1 rerun autonomic title</b> 25. <i>El Faro</i> (serial)  <b>IB3 – 6 rerun autonomic titles</b> 26. <i>El Faro</i> (serial) 27. <i>Laberint de Passions</i> (serial) 28. <i>Mossen Capellà</i> (series) 29. <i>Valterra</i> (series) 30. <i>Llàgrima de Sang</i> (series) 31. <i>L'Anell</i> (serial)  <b>TVG – 2 rerun autonomic titles</b> 32. <i>El Faro</i> (serial) 33. <i>Padre Casares</i> (series)  <b>Aragón TV – 1 rerun autonomic title</b> 34. <i>Los Artigas</i> (series)  <b>TOTAL PREMIERE TITLES: 19</b> <b>TOTAL RERUN TITLES: 15</b> <b>TOTAL BROADCASTED TITLES: 34</b>
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Source: Obitel Spain

The increase in the number of state fictions reverts in the increase of broadcast time (1,434 hours and 35 minutes) compared to 2016 (1,383 hours and 55 minutes). The number of premieres of Ibero-American fiction is very high this year (21 titles and 1,218 hours and 30 minutes), mainly due to the increase in the programming of telenovelas in the thematic DTT networks.

**Table 2. State premiere fiction in 2017: countries of origin**

Country	Title	%	Chap./ep.	%	Hours	%
<b>NATIONAL (total)</b>	<b>37</b>	<b>63.8</b>	<b>1970</b>	<b>57.3</b>	<b>1454:35:00</b>	<b>99.3</b>
<b>OBITEL COUNTRIES (total)</b>	<b>21</b>	<b>36.2</b>	<b>1468</b>	<b>42.7</b>	<b>1218:30:00</b>	<b>0.7</b>
<b>NON OBITEL COUNTRIES (total)</b>	<b>0</b>	<b>0.0</b>	<b>0</b>	<b>0.0</b>	<b>0:00:00</b>	<b>0.0</b>
<b>Argentina</b>	4	6.9	338	9.8	324:08:00	12.1
<b>Brazil</b>	1	1.7	12	0.3	12:00:00	0.4
<b>Chile</b>	0	0.0	0	0.0	0:00:00	0.0
<b>Colombia</b>	1	1.7	113	3.3	84:45:00	3.2

<b>Ecuador</b>	0	0.0	0	0.0	0:00:00	0.0
<b>Spain</b>	37	63.8	1970	57.3	1425:25:00	53.3
<b>USA (Hispanic production)</b>	4	6.9	270	7.9	219:00:00	8.2
<b>Mexico</b>	10	17.2	659	19.2	521:35:00	19.5
<b>Peru</b>	0	0.0	0	0.0	0:00:00	0.0
<b>Portugal</b>	0	0.0	0	0.0	0:00:00	0.0
<b>Uruguay</b>	0	0.0	0	0.0	0:00:00	0.0
<b>Venezuela</b>	1	1.7	76	2.2	57:00:00	2.1
<b>CO-PRODUCTIONS (total)</b>	<b>3</b>	<b>100.0</b>	<b>17</b>	<b>100.0</b>	<b>13:50:00</b>	<b>0.7</b>
<b>Spanish co-productions</b>	<b>2</b>	<b>66.7</b>	<b>16</b>	<b>94.1</b>	<b>10:30:00</b>	<b>0.0</b>
<b>Obitel co-productions</b>	<b>1</b>	<b>33.3</b>	<b>1</b>	<b>5.9</b>	<b>3:20:00</b>	<b>0.0</b>
<b>TOTAL</b>	<b>58</b>	<b>100.0</b>	<b>3438</b>	<b>100.0</b>	<b>2673:05:00</b>	<b>100.0</b>

Source: Obitel Spain

The national and regional time on air amounts to 1,941 hours and 30 minutes (1,805 hours and 25 minutes in 2016). Ibero-American fiction brings to the Spanish total 25 premieres (1,307 hours and 10 minutes).

**Table 2a. State and autonomic premiere fiction in 2017:  
countries of origin**

Country	Titles	%	Chap./ ep.	%	Hours	%
<b>NATIONAL (total)</b>	<b>56</b>	<b>69.1</b>	<b>2545</b>	<b>62.0</b>	<b>1941:30:00</b>	<b>99.4</b>
<b>OBITEL COUNTRIES (total)</b>	<b>25</b>	<b>30.9</b>	<b>1557</b>	<b>38.0</b>	<b>1307:10:00</b>	<b>0.6</b>
<b>NON OBITEL COUNTRIES (total)</b>	<b>0</b>	<b>0.0</b>	<b>0</b>	<b>0.0</b>	<b>0:00:00</b>	<b>0.0</b>
<b>Argentina</b>	4	4.9	338	8.2	324:10:00	10.0
<b>Brazil</b>	1	1.2	12	0.3	12:00:00	0.4
<b>Chile</b>	0	0.0	0	0.0	0:00:00	0.0
<b>Colombia</b>	4	4.9	179	4.4	154:05:00	4.7
<b>Ecuador</b>	0	0.0	0	0.0	0:00:00	0.0
<b>Spain</b>	37	46	2545	62	1941:30:00	60
<b>USA (Hispanic production)</b>	4	4.9	270	6.6	219:00:00	6.7
<b>Mexico</b>	11	13.6	685	16.7	541:05:00	16.7
<b>Peru</b>	0	0.0	0	0.0	0:00:00	0.0
<b>Portugal</b>	0	0.0	0	0.0	0:00:00	0.0
<b>Uruguay</b>	0	0.0	0	0.0	0:00:00	0.0
<b>Venezuela</b>	1	1.2	76	1.9	57:00:00	1.8
<b>CO-PRODUCTIONS (total)</b>	<b>5</b>	<b>100.0</b>	<b>39</b>	<b>100.0</b>	<b>38:18:00</b>	<b>100.0</b>
<b>Spanish co-productions</b>	<b>4</b>	<b>80.0</b>	<b>38</b>	<b>97.4</b>	<b>35:00:00</b>	<b>100.0</b>
<b>Obitel co-productions</b>	<b>1</b>	<b>20.0</b>	<b>1</b>	<b>2.6</b>	<b>3:18:00</b>	<b>0.0</b>
<b>TOTAL</b>	<b>81</b>	<b>100.0</b>	<b>4102</b>	<b>100.0</b>	<b>3248:40:00</b>	<b>100.0</b>

Source: Obitel Spain



In spite of the greater number of state titles premiered in prime time, the trend to reduce the number of episodes of new series results in less time on air on that slot (23.4%) compared to last year (24,1%). The difference is even more pronounced in the total of state and regional fiction (27.9% in 2017 and 29.2% in 2016).

On the contrary, as a result of the increase of telenovelas in state thematic DTT channels, time on air of Ibero-American fiction in prime time surpasses, for the first time, that of the afternoon slot (48.9% and 34.0 % respectively), the traditional niche of telenovelas. The proportion between both slots is further accentuated in the state and regional total (52.4% in prime time and 31.7% in the afternoon slot), also a novelty in 2017.

As shown in Table 4, 78.4% of state titles are series, a much higher percentage than in 2016 (68.8%), an expansion that has been mainly at the expense of the miniseries and telefilms, with a single state telefilm and an autonomic miniseries. Serial programming, on the other hand, remains quite stable (13.5% in 2017 and 12.5% in 2016). The distribution of formats of the Spanish total (state and autonomic) is similar. All Ibero-American fiction releases are telenovelas.

Table 3. Chapters/episodes and hours broadcasted  
by time slot – state fiction

Time slot	National				Ibero-American				Total			
	C/E	%	H	%	C/E	%	H	%	C/E	%	H	%
Morning (06:00-14:00)	9	0.5	1:40:00	0.1	189	12.9	141:45:00	11.6	198	5.8	141:45:00	5.3
Afternoon (16:00-21:00)	1497	76.0	1090:10:00	74.9	530	36.1	414:50:00	34.0	2027	59.0	1505:00:00	56.3
Prime time (21:00-23:30)	436	22.1	340:40:00	23.4	665	45.3	595:55:00	48.9	1101	32.0	936:35:00	35.0
Night (23:30-06:00)	2	0.1	0:45:00	0.1	0	0.0	0:00:00	0.0	2	0.1	0:45:00	0.1
Others	26	1.3	21:20:00	1.5	84	5.7	66:00:00	5.4	110	3.2	87:20:00	3.3
Total	1970	100.0	1454:35:00	100.0	1468	100.0	1218:30:00	100.0	3438	100.0	2673:05:00	100.0

Source: Obitel Spain

Table 3a. Chapters/episodes and hours broadcasted  
by time slot – state and autonomic fiction

Time slot	National				Ibero-American				Total			
	C/E	%	H	%	C/E	%	H	%	C/E	%	H	%
Morning (06:00-14:00)	9	0.4	1:40:00	0.1	189	12.1	141:45:00	10.8	198	4.8	141:45:00	4.4
Afternoon (16:00-21:00)	1886	74.1	1376:20:00	70.9	556	35.7	414:50:00	31.7	2442	59.5	1791:10:00	55.1
Prime time (21:00-23:30)	622	24.4	541:25:00	27.9	728	46.8	684:35:00	52.4	1350	32.9	1226:00:00	37.7
Night (23:30-06:00)	2	0.1	0:45:00	0.0	0	0.0	0:00:00	0.0	2	0.0	0:45:00	0.1
Others	26	1.0	21:20:00	1.1	84	5.4	66:00:00	5.0	110	2.7	87:20:00	2.7
Total	2545	100.0	1941:30:00	100.0	1557	100.0	1307:10:00	100.0	4102	100.0	3248:40:00	100.0

Source: Obitel Spain

Table 4. Formats of state and Ibero-American fiction

Format	National				Ibero-American			
	Titles	%	C/E	%	H	%	Titles	%
Serial / telenovela	5	13.5	993	50.4	819:00:00	56.3	21	100.0
Series	29	78.4	534	27.1	412:25:00	28.4	0	0.0
Miniseries	0	0.0	0	0.0	0:00:00	0.0	0	0.0
Telefilm	1	2.7	1	0.1	1:40:00	0.1	0	0.0
Unitary	0	0.0	0	0.0	0:00:00	0.0	0	0.0
Docudrama	1	2.7	441	22.4	220:30:00	15.2	0	0.0
Others	1	2.7	1	0.1	1:00:00	0.1	0	0.0
Total	37	100.0	1970	100.0	1454:35:00	100.0	21	100.0

Source: Obitel Spain

Table 4a. Formats of state, autonomic and Ibero-American fiction

Format	National				Ibero-American			
	Titles	%	C/E	%	H	%	Titles	%
Serial / telenovela	8	14.3	1382	54.3	1105:10:00	56.9	25	100.0
Series	43	76.8	709	27.9	606:20:00	31.2	0	0.0
Miniseries	1	1.8	2	0.1	2:20:00	0.1	0	0.0
Telefilm	1	1.8	1	0.0	1:40:00	0.1	0	0.0
Unitary	0	0.0	0	0.0	0:00:00	0.0	0	0.0
Docudrama	1	1.8	441	17.3	220:30:00	11.4	0	0.0
Others	2	3.6	10	0.4	5:30:00	0.3	0	0.0
Total	56	100.0	2545	100.0	1941:30:00	100.0	25	100.0

Source: Obitel Spain

The absence of miniseries and telefilms in 2017 has allowed the series of state channels to increase their presence in prime time (92.0% in 2017 and 80.8% in 2016). The afternoon is still the preferred slot for serials, although it suffers from the increase in series in prime time (62.5% scheduled in the afternoon in 2017 and 66.7% in 2016). The total programming (state and autonomic) offers a similar profile, with 90.2% of series aired during prime time and 72.7% of serials aired in the afternoon.

**Table 5. Formats of state fiction per time slot**

For- mats	Morn- ing	%	Af- ter- noon	%	Prime time	%	Night	%	Oth- ers	%	To- tal	%
Serial	0	0.0	5	62.5	0	0.0	0	0.0	0	0.0	5	13.5
Series	1	100.0	2	25.0	23	92.0	1	100.0	2	100.0	29	78.4
Mini- series	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Tele- film	0	0.0	0	0.0	1	4.0	0	0.0	0	0.0	1	2.7
Uni- tary	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Docu- drama	0	0.0	1	12.5	0	0.0	0	0.0	0	0.0	1	2.7
Others	0	0.0	0	0.0	1	4.0	0	0.0	0	0.0	1	2.7
Total	1	100.0	8	100.0	25	100.0	1	100.0	2	100.0	37	100.0

Source: Obitel Spain

**Table 5a. Formats of state and autonomic fiction per time slot**

For- mats	Morn- ing	%	Af- ter- noon	%	Prime time	%	Night	%	Oth- ers	%	To- tal	%
Serial	0	0.0	8	72.7	0	0.0	0	0.0	0	0.0	8	14.3
Series	1	100.0	2	18.2	37	90.2	1	100.0	2	100.0	43	76.8
Mini- series	0	0.0	0	0.0	1	2.4	0	0.0	0	0.0	1	1.8
Tele- film	0	0.0	0	0.0	1	2.4	0	0.0	0	0.0	1	1.8
Uni- tary	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Docu- drama	0	0.0	1	9.1	0	0.0	0	0.0	0	0.0	1	1.8
Others	0	0.0	0	0.0	2	4.9	0	0.0	0	0.0	2	3.6
Total	1	100.0	11	100.0	41	100.0	1	100.0	2	100.0	56	100.0

Source: Obitel Spain

The rise of crime shows has increased the number of fictions set in present time (62.2% in 2017 and 48.6% in 2016), although the number of historical fictions remains the same (three in 2017 as well as in 2016). The proportion is very similar in the Spanish total because, unlike the state networks, autonomic ones hardly ever change the temporary setting, which is typically the present day.

**Table 6. Time period of state fiction**

Time period	Titles	%
<b>Present</b>	23	62.2
<b>Period</b>	10	27.0
<b>Historical</b>	3	8.1
<b>Other</b>	1	2.7
<b>Total</b>	<b>37</b>	<b>100.0</b>

Source: Obitel Spain

**Table 6a. Time period of state and autonomic fiction**

Time period	Titles	%
<b>Present</b>	39	69.6
<b>Period</b>	13	23.2
<b>Historical</b>	3	5.4
<b>Other</b>	1	1.8
<b>Total</b>	<b>56</b>	<b>100.0</b>

Source: Obitel Spain

Comedy *Allí Abajo* takes the first place of the yearly ranking, leading for the first time with an average share below the 20% mark. Antena3 and Tele5 have four titles, respectively, among the ten most watched titles, in a classification that highlights the presence of Globomedia, which has produced three thrillers and a comedy. For the first time in Obitel records, the ten most watched programs of state fiction are series, half of which are thrillers and only two are set in the past.

**Table 7. The ten most watched state titles:  
origin, rating, viewers, share**

	Title	Country of origin	Channel	Format	Chap./ep. (2017)	Time slot	Rating	Viewers	Share
1	<i>Allí Abajo</i>	Spain	An-tena3	Series	16	Prime time	7.0	3,134,438	19.78
2	<i>La que se Avecina</i>	Spain	Tele5	Series	13	Prime time	6.6	2,926,385	19.92
3	<i>Cuéntame Cómo Pasó</i>	Spain	La1	Series	19	Prime time	6.5	2,898,105	17.6
4	<i>Perdónname, Señor</i>	Spain	Tele5	Series	8	Prime time	6.3	2,823,750	19.1
5	<i>El Accidente</i>	Spain	Tele5	Series	5	Prime time	6.1	2,711,200	17.54
6	<i>Sé Quién Eres</i>	Spain	Tele5	Series	16	Prime time	5.4	2,404,688	15.22
7	<i>Tiempos de Guerra</i>	Spain	An-tena3	Series	13	Prime time	5.2	2,305,923	15.55
8	<i>La Casa de Papel</i>	Spain	An-tena3	Series	15	Prime time	5.2	2,297,200	14.28
9	<i>Estoy Vivo</i>	Spain	La1	Series	13	Prime time	4.9	2,162,615	14.12
10	<i>Pulsaciones</i>	Spain	An-tena3	Series	10	Prime time	4.8	2,132,200	12.99
<b>Total productions:</b>					<b>Foreign scripts:</b>				
100%					0%				

Source: Obitel Spain

Drama *Merlí* leads, for the second year in a row, an autonomous ranking with an even lower ceiling than the state one (17.1% share). TVC is the only channel of this group that still produces its serials (*La Riera* and *Com si Fos Ahir* in 2017), while the rest of the formats are external productions, as in the other regional channels.

**Table 7a. The ten most watched autonomic titles:  
origin, rating, viewers, share**

	Title	Country of origin	Channel	Format	Chap./ep. (2017)	Time slot	Rating	Viewers	Share
1	<i>Merlí</i>	Spain	TV3	Series	12	Prime time	7	499,000	17.1
2	<i>Au-gasquentes</i>	Spain	TVG	Series	5	Prime time	4.5	320,000	18.8

3	<i>La Riera</i>	Spain	TV3	Serial	188	After-noon	4.5	320,000	18.8
4	<i>Nit i Dia</i>	Spain	TV3	Series	13	Prime time	4.3	309,000	12
5	<i>El Crac</i>	Spain	TV3	Series	12	Prime time	3.9	275,000	10.5
6	<i>Entreolivos</i>	Spain-Mexico	Canal-Sur	Series	13	Prime time	3.2	260,000	8
7	<i>Com si Fos Ahir</i>	Spain	TV3	Serial	67	After-noon	3.3	236,000	15
8	<i>Dalia, a Modista</i>	Spain	TVG	Mini-series	2	Prime time	6.6	175,000	16.7
9	<i>Serramoura</i>	Spain	TVG	Series	37	Prime time	5.2	138,000	13.9
10	<i>Pazo de Familia</i>	Spain	TVG	Series	29	Prime time	4.5	118,000	11.8
<b>Total productions:</b>					<b>Foreign scripts:</b>				
100%					0%				

Source: Obitel Spain

### 3. Transmedia reception

This section explores the transmedia universe of *Estoy Vivo* (La1) and the interaction it generated on the official Facebook page. Co-produced by Globomedia for TVE and aired between September 7 and December 14, this crime series with fantastic elements has become the leading program in its time slot. The first episode obtained a 17.3% share and 2,477,000 viewers, and the average of the season stands at 14.1% share and 2,163,000 viewers. The script-writing team of Globomedia also took charge, along with RNE, of the realization of the sound fiction “Bienvenido a la Pasarela”<sup>12</sup>, a prequel to the series in podcast format composed of seven chapters, as well as the video blog “En la Dimensión de Bea”.

*Estoy Vivo* is present in four official platforms: Facebook (@estoyvivotve, 4,717 likes and 4,923 followers<sup>13</sup>), Twitter (@estoyvivo\_tve, 793 tweets, 3,379 followers and 556 likes<sup>14</sup>), Instagram

<sup>12</sup> Data collected on January 13, 2018. Available at: <http://www.rtve.es/radio/ficcion-sonora/>

<sup>13</sup> Sample collection from the official Facebook page took place between December 7 and 12, 2017, a week before and after airing the final episode of the series. The profile was created on July 12 and the posts were published between July 28 and December 31, 2017.

<sup>14</sup> Data collected on December 27, 2017.

(@ estoyvivotve, 5,568 followers and 90 posts<sup>15</sup>) and a video blog available on YouTube.

### ***Internet users' discourse***

During the analyzed period, the number of followers on the official Facebook page went from 4,923 to 5,437 and the number of likes increased from 4,717 to 5,215. A total of 17 comments were published by the administrator while 688 messages responded to the initial post, resulting in 476 shared posts and 6,420 user reactions. There is a distinct difference regarding the number of messages in each update (40 responses as an average), which could be attributed to the ease of action and the degree of enthusiasm (Tur-Viñes and Rodríguez, 2014: 125).

There are two to three daily Facebook updates, coinciding with the final broadcast, which shows that the response of the audience increased as the ending was approaching and continued throughout the following day (Gómez Rubio and López Vidales, 2015). The manager's posts are informative (advances, making of, etc.) and one of the messages that raised the most comments, published on December 20th, mentioned the renewal of the fiction (13.6%, 94 comments). A direct link to RTVE's website is included in all the entries, where there is ample information about the series.

In line with the trend detected in previous years, 77.3 % (545) of the comments are signed with female names (proper names or common nouns), 20.3% (143) male and 2.4% (17 comments) correspond to the administrator's posts. Regarding the different functions of the messages (Jakobson, 1984 [1960]), the emotive function stands out, as viewers express their feelings on the death of one of the characters during the final episode (69.4%, 489 comments). The conative function is identified in the requests for the fiction to continue (14.8%, 104 comments), appealing to the inclusion of new plots or the resolution of unanswered questions. Also, 3.3% (22

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15 Data collected on December 28, 2017.



comments) of the messages complain about airing time and script errors (metalinguistic function). The poetic function of the comments analyzed includes also the interventions in a negative way to the development of the plots (2%, 14 comments). For example, in the final episode of the series there is a dialogue between the characters that users attribute to a “blunder of the writers”. Finally, the administrator’s posts related to self-promotion or the progress of the next episode, linked directly to the official website, showing the referential function, represent 11% of the comments (76).

To sum up, the published content reflects the participation and interaction of users on the administrator’s entries and responds to the observational and discursive models proposed by García and Heredero (2015: 266). *Estoy Vivo* also adds to the transmedia universe promoted by RTVE, as it allows weekly viewings of the episodes alongside the search for content on other web platforms. This improves understanding of the series, although they can be consumed autonomously (Paíno and Rodríguez, 2016: 1041).

#### 4. Highlights of the year

The incursion of Telefónica and VoD platforms Netflix and HBO in the production of Spanish fiction has had an impact on the greater number of premieres, as well as on the renewal of genres and formats that has taken place in 2017 (McDonald and Smith-Rowsey, 2016). However, despite the high standards of quality and the agility with which domestic fiction adapts to new market trends, audience results heavily suffer from the extreme competitiveness.

Intrigue genres (thriller and crime) continue on the ascendant path undertaken in recent seasons, with five premieres that are among the ten most watched programs of the year: *El Accidente* (2,711,200 viewers and 17.5% share), *Sé Quién Eres* (2,404,688 viewers and 15.2% share), *La Casa de Papel* (2,297,200 viewers and 19.3% share), *Estoy Vivo* (2,162,615 viewers and 14.1% share) and *Pulsaciones* (2,020,400 viewers and 12.5% share). Among other novel aspects within this group it is important to highlight the

hybridization with fantasy of *Estoy Vivo* and *Pulsaciones*, the innovative plot of *La Casa de Papel* (structured around a robbery to the National Factory of Currency and Stamp) and the smaller number of episodes of *Pulsaciones* (ten), another trend in 2017.

The premiere in La1 of police serial *Servir y Proteger* (1,043,776 viewers and 9.4% share), which replaced period drama *Seis Hermanas* (627,231 viewers and 6.2% share), is also a noteworthy novelty after the predominance in recent years of serials set in the past. All in all, in the mix of crime and drama of *Servir y Proteger*, the plots related to the two female protagonists predominate over the intrigue itself. This lines up with the generalized thematic reiteration that occurs in a year in which severe disabilities (*Sé Quién Eres*) and Alzheimer's disease (*Estoy Vivo*) are mere glimpses in the background. ETA's terrorism, rarely addressed in Spanish fiction, takes on a certain importance in *Cuéntame Cómo Pasó* (2,898,105 and 17.6% share), set in the 1980s in its 18th season.

The rise of crime shows has as a corollary a significant reduction in comedy, despite the fact that *Allí Abajo* (3,134,438 viewers and 19.7%) and *La que se Avecina* (2,263,385 and 19.9% share) respectively lead the annual ranking. To the point that the only two comedies released on generalist networks, *Ella Es Tu Padre* (1,729,500 viewers and 11.6%) and *iFamily* (897,125 viewers and 6.4% share), have passed unnoticed on Tele5 and La1 respectively.

La1 is, once again, the network with the highest number of fictions (14), six of which have premiered this year. But, despite some bold initiatives that explore life after death, such as the aforementioned detective show *Estoy Vivo* and intermedia youth thriller *Si Fueras Tú*<sup>16</sup>, the average performance is far from satisfactory (9% share).

The seven fictions of Antena3 register an average share of 14.6%, although drama *Tiempos de Guerra* (2,305,923 viewers and 15.6% share), about a group of nurses during the tenth year of the

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<sup>16</sup> La1 released the first and last of the nine episodes of *Si Fueras Tú* and offered the other seven on its online platform Playz RTVE.

Rif war between Spain and Morocco (1921), has not fulfilled the expectations generated. Tele5, less involved in fiction production than its competitors, has six programs (four of which were new releases), which have reported an average share of 15.2%.

The eight premieres of the pay channels mark a milestone in the trajectory of Spanish fiction. #0, Telefónica's subscription channel, stands out with an impeccable apocalyptic crime (*La Zona*), a comedy of sketches about other's shame (*Vergüenza*), a docuseries about the first 30 years of the American Conquest (*Conquistadores*) and the spinoff of *Velvet* (Antena3, 2014-2016), *Velvet Collection*. Netflix, on the other hand, resorts to *Las Chicas del Cable*, a conventional period drama structured around four young telephonists in the 1920s, while HBO sets *Supermax* behind the scenes of a reality show. Finally, Disney differentiates its youth offering between female audience (*Coco & Lana*) and male audience (*C.R.A.K.S*).

Galician TVG is the regional network that most invested in its own fiction, as it released ten out of the 21 titles by this group of channels. One of its premieres, comedy *Aguasquentes*, has the best share of 2017 (18.8% and 320,000 viewers). TV3's series *Merlí* (499,000 and 17.1% share), starring a philosophy teacher and his students, has gathered the largest number of viewers, while *Com si Fos Ahir* (236,000 and 15% share), the serial that has replaced long-lived *La Riera* (320,000 and 18.8%), is almost four points below its predecessor.

## 5. Theme of the year: TV fiction on video on demand platforms

Internet has become the great ally of television fiction with the strategy initiated by the telecommunication companies of the "quintuple package", the possibility of contracting together for a fixed price per month pay television, fixed telephony, mobile telephony, fixed broadband and mobile broadband. In parallel, international streaming platforms broke into the Spanish market: Netflix (2015), HBO (2016), Amazon Prime Video (2016) and Sky (2017), which joined Spanish Movistar+ (2015), the platform of pay TV by Tele-

fónica, Filmin (2007) – a pioneer in European film and television fiction content –, and Wuaki.tv (2007), acquired in 2012 by Japanese group Rakuten.

The need to adapt to an audience with digital consumption habits (individuality, mobility, on-demand programming, binge watching) and the increase of mobile devices have amplified the demand for contents that allow non-linearity and asynchrony (Sádaba Chalezquer, García Avilés and Martínez-Costa, 2016).

### ***Internet and open television fiction***

In 2010, Michael Lynton, co-director of Sony Pictures Entertainment, mentioned the possibility of leaving the Spanish market because of its piracy activity (Fritz, 2010). In fact, compared to other European countries, Spain has been a late developer of legislation and IP protection policies; and, for more than a decade, the lack of alternatives to traditional viewing and accessibility to illegal content turned the internet into the great enemy of copyright owners. Film fiction is the most pirated content (32%), followed by fiction series (27%), music (26%), books (22%), video games (12%) and soccer (10%).<sup>17</sup> In this context, YouTube became the symbol of free internet content: a website that allowed users to share videos made in an amateur way, on a platform with a global audience of one billion users. But, despite going back to the participatory culture and the DiY (Jenkins, 2008), the legal problems for copyright soon arose.

New modalities of VoD initially divided the industry between those that understood the internet was a future ally and those that faced the new dynamic determined to protect their linear programming. In Spain, the two main private operators adopted opposite attitudes in this regard. Thus, while Tele5 (Mediaset) started a legal battle over the prohibition of using its content on YouTube that lasted seven years (2008-2015), its great competitor, Antena3 (Atresmedia), became the first channel in Spain (and the second in Europe

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<sup>17</sup> Piracy descends 4%. Observatory of piracy and digital consumption habits 2016. Available at <http://lacoalicion.es/wp-content/uploads/np-observatorio-2016.pdf>

after BBC) to launch its own channel on YouTube, in 2007, and to concentrate the videos with the group's contents on the platform (Alcolea Diaz, 2017). Public television TVE began to adapt and innovate to the new media a few months later.

### ***Atresmedia***

After launching its own channel on YouTube, Antena3 was also a pioneer in allowing the streaming of complete seasons of those shows already aired on television<sup>18</sup>, through a combination of AVoD and TVoD. In 2013, the network launched Atrestube, a multichannel network of Atresmedia on YouTube, from which they promote products derived from the group's productions (clips from series, previews, interviews, etc.), and Atresplayer, a freemium video platform to watch programs live or catch up on content. In both cases there are territorial restrictions and special services for registered and premium users (TVoD), without advertising, with subtitles, possibility of downloading for offline viewing and previews.

In 2014, Atresmedia Conecta was launched, the second screen application for mobile devices from which it is possible comment and follow the thread of the most popular hashtags on Twitter without leaving the application. In 2015, Flooxer was created, a digital native short video platform similar to YouTube, but more controlled, since the UGC is limited and the creators must send a proposal to the platform in order to upload their content.

### ***Mediaset***

Mediaset's relationship with the internet, much later than that of Atresmedia, has been gaining ground. In 2015 ended the seven-year litigation against YouTube, accused by the group of violating their intellectual property rights. The video platform defended them-

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<sup>18</sup> Catalan autonomic channel TVC was the first Spanish network to offer complete seasons on the internet in 2004 through their free VoD web application (<http://www.ccma.cat/tv3/alacarta/programes/series/>).

selves by assuring that it was content created by users.<sup>19</sup> In 2011 it launched MiTele, its VoD platform, free and without registration, offering streaming or on demand programming from different networks in the group. In 2016 it presented Mtmad, a MiTele channel of native digital videos built in the guise of YouTube and Flooxer, which targets millennial viewers through influencers, youtubers, vloggers, and gamers.

### ***TVE***

The state public television opted from the beginning for the presence on the internet with a total remodeling of the website RTVE.es in 2008, whose section “RTVE.es A La Carta” is one of the largest containers of professional VoD in Spanish audio and video on the internet, totally free.

In 2011 it created the Audiovisual Innovation Laboratory to explore new ways of narrating on the internet and how to reach young people. In 2017 it presented Playz, a platform that joins Flooxer and Mtmad in their search to create loyalty among millennials. In this case, it is committed to entertainment, but also fiction in interactive and innovative formats, such as *Si Fueras Tú*, an interactive mystery series starring a group of teenagers in which the resolution of dilemmas and conflicts of the characters is reflected in the following episode.<sup>20</sup>

### ***YouTube***

YouTube has changed the viewing habits and has become the model of digital native content (as we have seen in the cases of Flooxer, Mtmad and Playz). But it is also true that television has influenced YouTube, since it serves as a connection between corporate

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<sup>19</sup> Fernández, E. (2015, Octubre 21). Mediaset firma la paz con YouTube. *El Mundo*. Available at <http://www.elmundo.es/television/2015/10/21/562773b546163fac218b4625.html>

<sup>20</sup> The Wit, which is an influential consultant, highlighted *Si Fueras Tú* at Mipcom in Cannes. See <http://www.lavanguardia.com/vida/20171018/432162484547/el-mipcom-de-cannes-cita-a-si-fueras-tu-entre-las-innovaciones-del-sector.html>

content and advertising, as well as a platform for corporate channel platforms to gain access and visibility. From this point of view, it can be said that its strategy is similar to that of a conventional medium (Kim, 2012).

In Spain, the contents of Spanish TV fiction offered on YouTube are usually of an official nature: trailers and series previews, clips of episodes already aired, musical clips with the song of the series, making of, interviews with the actors and the technical team. In the first pages of search there are also interviews to actors or actresses by other media, but there are barely any UGC videos of recent television fictions. Television channels have their own channels on YouTube: Atrestube (Atresmedia, 8,022 subscribers), Mitele & You (Mediaset, 8,873 subscribers) and RTVE (284,979 subscribers), although only the latter offers complete episodes of its series on the platform.

The decrease of almost four points in the consumption of YouTube, in just over a year, hints at a possible reconfiguration of the different scenarios in which the platforms move. Although the fall mainly affects generic content, it must be taken into account that the aging of its internet users is faster than the growth in the number of users.<sup>21</sup>

### ***Paid platforms: the future of fiction?***

The irruption of telecommunications companies in the content market has notably changed the panorama of consumption and production of Spanish television fiction. Until relatively recently, soccer and cinema were the great bet to gain the loyalty of subscribers of telecommunications companies, but the boom of fiction and the emergence of international platforms have turned the series into the object of desire of different companies that seek exclusivity to differentiate themselves and build a brand image (Guerrero, Diego and Pardo, 2013).

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<sup>21</sup> See The Cocktail Analysis, Televidente 2.0. Análisis del impacto tecnológico en el consumo audiovisual (May 2017), available at <https://www.audiovisual451.com/wp-content/uploads/PDF-1.pdf>

The struggle among telephony operators for the supply of television platforms provides significant value, whose epicenter is the TV fiction: Vodafone (Netflix, HBO and Filmin), Orange (Netflix, Rakuten-Wuaki, Movistar Series and Movistar Xtra Series) and Movistar+ (Netflix). In this new scenario, where the convergence between communications companies and over-the-top services is a growing demand, international platforms are committed to producing regional or local content to establish their brands in different countries (Johnson, 2013).<sup>22</sup> At the same time, Spanish companies aim to lead the pay TV<sup>23</sup> fiction market, with the aim of creating quality content thinking also about international distribution.<sup>24</sup>

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<sup>22</sup> Cannilla, F. (2017, Marzo 30). CEO de Netflix: 'El negocio ahora es el contenido propio regional'. *Infotechnology*. Available at: <http://www.infotechnology.com/negocios/CEO-de-Netflix-El-negocio-ahora-es-el-contenido-propio-regional-20170330-0002.html>

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<sup>24</sup> Hopewell, J y Pablos, E. (2017, 1 Abril). Movistar+ ha llegado a acuerdos con Sky Vision (Reino Unido), Beta Film (Alemania) y About Premium Content (Francia) para la distribución internacional de sus contenidos. Available at: <http://variety.com/2017/film/global/movistar-plus-sky-vision-beta-premium-content-series-1202020930/>



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# UNITED STATES: *EL SEÑOR DE LOS CIELOS* DOMINATES<sup>1</sup>

*Author:* Juan Piñón<sup>2</sup>

## 1. Hispanic USA's audiovisual context in 2017

In 2017, network Univision won audience share in (2+) television prime time slot; however, Telemundo was the network that exceeded in ratings in the 18-49 and 18-34 age groups, which are the most coveted ones by advertisers.<sup>3</sup> This fact is even more relevant because it represents a historic moment for Spanish-language television. For the first time, Telemundo was able to disrupt the 50-year-old hegemonic position that Televisa's programming had enjoyed in Univision's prime time programming slot.

At the end of the 1990s, under the support of Sony, Telemundo abandoned, for a brief period, the scheduling of telenovelas as its prime time programming strategy, with disastrous consequences for its ratings. Telemundo then needed to rectify its mistake quickly; what that meant was that, by the end of 1999, the network was then focused on the in-house production of telenovelas. In 2001, when NBC bought Telemundo, it put the corporate resources at the network's disposal to continue with this strategy of original production.

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<sup>1</sup> On behalf of Obitel, we want to express our profound gratitude to Brad Poretzskin, Vice President National Leader at TAM Nielsen, Edward Stoesser, Ralph Spencer and Elisabeth Oldis, from the Client Solutions in Local Media team at Nielsen Media Research, for their help with this study and for their invaluable contribution to the field of Hispanic television research.

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<sup>3</sup> Fernandez, J. (2017, December 18). Univision, Telemundo continue battle for US Hispanic viewers. *RapidTVNews*. Retrieved from <https://www.rapidtvnews.com/2017121850124/univision-telemundo-continue-battle-for-us-hispanic-viewers.html#axzz57VAzlh8J>

This strategy was based mainly on production and co-production with various partners on several fronts: first, with the growth and consolidation of the original production from Miami; and second, with co-production with key networks and studios in Brazil, Colombia and Mexico. After a decade of experimentation, the network found its first big original success within the U.S. Hispanic market with the co-production of *La Reina del Sur*.<sup>4</sup> This telenovela represented a production strategy based on a narrative model tailored for the region, steered from Miami, which I have denominated *reglobalization* (Piñón, 2014), as an alternative formula for viable success. After this hit, an effective marketing campaign positioned the new productions under this model for prime time not as telenovelas, but rather as super series. The strategy was to abandon the term *narconovela* in order to link these productions with the concept of series, a format notion that is closer to American television culture. The super series gave Telemundo the first place in prime time ratings in the U.S. Spanish-language television in the 18-49 age group. The sustained success of five seasons of *El Señor de los Cielos*, an original production of Telemundo, made in Mexico by Argos Communications, represents the most significant example of this accomplishment. This phenomenon's impact has spread throughout the industry; Univision started experimenting with the production of narcoseries with Netflix (*El Chapo*), and super series with W Studios (*La Piloto*). Now, Televisa, from Mexico, expands on that narrative line as well, and it is proposing its own strategy, which the network now calls super dramas. The war for ratings will be ferocious in 2018.

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<sup>4</sup> *La Reina del Sur* is a co-production of Telemundo, RTI Colombia and Antena 3 (Spain), with the collaboration of Argos (Mexico).

1.1. Broadcasting Hispanic television in the United States

Chart 1. Broadcasting national television networks/channels on Hispanic TV in the U.S.

PRIVATE NETWORKS
Azteca America
EstrellaTV
Telemundo
UniMás
Univision
TOTAL PRIVATE NETWORKS: 5

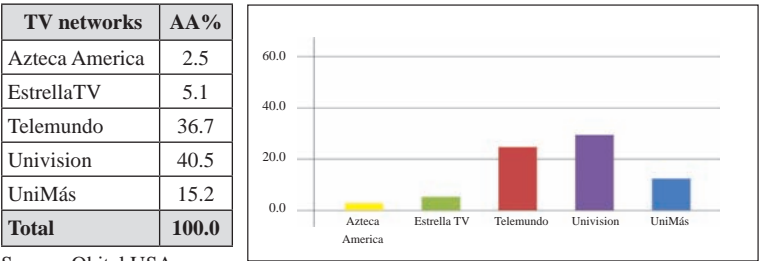
Source: Obitel USA

In 2017, the number of national broadcasting television networks was reduced from seven to five, with the demise of MundoMax and the change in status of Vme. At the end of the year, the sale of Azteca America to HC2 Holdings, a financial services company, was announced. This put an end to TV Azteca’s goal to conquer an important segment of the Hispanic market when the network launched from Los Angeles in 2001. In contrast, Televisa is gaining ground, as a result of the announcement by the Federal Communication Commission (FCC): the Mexican media corporation was allowed to increase its financial share in Univision, the US Hispanic media corporation. Televisa announced a series of measures to strengthen both corporations at binational levels. Some of the most important changes were the assignation of Issac Lee as content director for both media corporations and Emilio Azcarraga’s resignation as Televisa’s executive director at the end of the year. Meanwhile, Telemundo also showed changes throughout its Content Division, with the creation of Telemundo International Studios in 2016, which has the purpose of creating premium programming under Marcos Santana as director. At the beginning of 2018, Telemundo announced that both Telemundo Studios and Telemundo International Studios would merge into Global Television Studios,

which reinforced a corporate transnational strategy with the support of NBC-U/Comcast, its parent company.

In spite of Azteca America’s sale, a programming agreement with HC2 will allow TV Azteca to keep its position as content provider in the years to come. The demise of MundoMax had an impact on the programming offered in 2017. In particular, content from network Rede Record found a window of distribution with networks UniMás and Univision. The company’s closure also offered the opportunity for minor networks, such as EstrellaTV, to win some share points. In addition, the closing of MundoMax and the selling of Azteca America resulted in the withdrawal of Colombian RCN, Mexican TV Azteca, and Spanish Prisa as media owners of Hispanic national broadcasting television. However, their presence will continue as content providers through the different Hispanic television networks programming grid. At the same time, the dominance of Televisa is consolidated as the Latin American corporate leader in the Hispanic television market at a national level.

**Graph 1. TV rating and share by network**

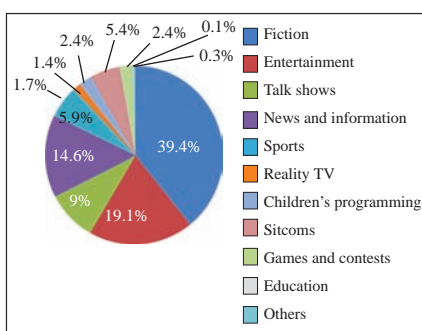


**Graph 2. TV programming by genre**

Genres broadcast	Hours	%
Fiction	13608:48	39.4
Entertainment	6593:34	19.1
Talk shows	3100:39	9.0
News and information	5045:06	14.6

Sports	2039:00	5.9
Reality TV	476:00	1.4
Children's programming	819:56	2.4
Sitcoms	1852:08	5.4
Games and contests	840:54	2.4
Education	46:12	0.1
Others	108:15	0.3
<b>TOTAL</b>	<b>34528:43</b>	<b>100.0</b>

Source: Obitel USA – Nielsen



## 1.2. Audience trends over the year

Univision and Telemundo declared themselves to be the rating winners in 2017, and both assertions can be considered true. Univision won the audience rating in relation to the total audience's number (2+) in prime time. However, Telemundo won the ratings in relation to the audience of the 18-49 and 18-34 age groups (Fernandez, 2017). Thus, Telemundo became the number one network in prime time in the most coveted segments of the audience for advertisers. UniMás increased in terms of total audience in relation to 2016. EstrellaTV maintained its fourth place, with a slight increase in its total audience, and Azteca America went from sixth to fifth place with the absence of MundoMax.

## 1.3. Advertising investments: in TV and in fiction

In 2017, Univision Communications had a revenue of 3,016 million dollars, which represented a reduction of 0.8% compared to the 3,042 million dollars from 2016. But it had a net income of 655 million dollars, much higher than the 218,900 dollars from 2016.<sup>5</sup> Meanwhile, NBC-U, a division of Comcast, owner of Telemundo, reported an annual income in its broadcasting division<sup>6</sup> of 9,546 mil-

<sup>5</sup> 4Q Univision (2018). Univision Communications Inc. Announces 2017 Fourth Quarter Results. Financial Reports. *Univision Corporate*. Retrieved from [http://s2.q4cdn.com/417187916/files/doc\\_news/2018/02/FINAL-Earnings-Release-Q4-2017.pdf](http://s2.q4cdn.com/417187916/files/doc_news/2018/02/FINAL-Earnings-Release-Q4-2017.pdf)

<sup>6</sup> NBC-U broadcasting TV includes Telemundo and NBC networks (with its news divisions, entertainment, and sports), the television stations, and regional networks Cozi TV and TeleXitos.

lion dollars. This represented a decrease of 5.9% compared to 2016. This reduction is because, in 2016, broadcasting television benefited from the extraordinary income coming from Rio de Janeiro Olympic Games, in Brazil.<sup>7</sup> Reports from Azteca America during the first three quarters of 2017 showed an increase in network sales in relation to 2016. However, operation costs, in particular distribution and geographical coverage of its signals, were higher than the sales reported, resulting in an accumulative negative balance of 147 million Mexican pesos. The long history of the distribution challenges faced by the network (Piñón, 2011), which now consistently produced financial losses for the corporation, probably was a key factor in the decision to sell the network in November of last year.<sup>8</sup>

#### **1.4. Merchandising and social merchandising**

Spanish-language networks continue their support for vulnerable communities. This year, the natural disasters happening with hurricanes Harvey in Houston/Texas and Irma in Puerto Rico, and the earthquake in Mexico City urged the production of different special events like “We Are One Voice” (Somos Una Sola Voz), in which they got together to fundraise to help victims. Such social work also continued on different grounds. Univision continued “Univision with You” (Univision Contigo) to support health services and “Small and Valuable” (Pequeños y Valiosos) to support education. Telemundo continued with “Power from You” (El Poder de Ti), which was oriented towards education, health, finances, and social engagement. EstrellaTV supported organizations helping the LGBT community, and Azteca America continued with its support of youth through art by integrating them to musical choruses. All the networks launched information campaigns directed to the Hispanic population, particularly to the migrant community, in the wake of

<sup>7</sup> 4Q Comcast (2017). Comcast Reports 4th Quarter and Year End 2017 Results. *Comcast Corporate*. Retrieved from <https://www.cmcsa.com/news-releases/news-release-details/comcast-reports-4th-quarter-and-year-end-2017-results>.

<sup>8</sup> TV Azteca (2017). Relaciones inversionistas. *TV Azteca*. Retrieved from <http://www.irtvazteca.com/es/resultados-trimestrales>.

constant threats of deportation by the immigration services. This situation was exacerbated when Trump's administration decided to take away legal protection from more than 1.9 million undocumented Latinos who were brought to the United States when they were children by their parents. This population, which is known as "the dreamers", was protected by the Dream Act, promoted by Obama's administration, but subsequently repealed by Donald Trump.

### **1.5. Communication policies**

In January, the FCC issued Televisa authorization to increase its property in Univision Communications up to 49%, becoming the most important legal provision impacting the corporate composition of the Hispanic networks in 2017. The law does not allow foreigners to have more than 25% of participation in broadcasting TV stations, so this authorization allows Televisa not only to increase its financial participation, but also to become the main shareholder of Univision.

This time, in December, another key legislative decision was issued by the FCC when Trump's administration made the decision to repeal the net neutrality provision. This regulation was implemented by Obama's administration, which forced the telecommunication companies to treat internet services like any other basic utility, such as water, light, and gas. Without the regulation, companies could establish differentiated internet speed services, at different prices, in detriment to consumers. By revoking net neutrality, the companies could establish a hierarchy of services and prices, which would trigger a digital divide based on economics, with a strong impact on information, education and entertainment offered through the internet.

### **1.6. ICT trends**

Access to the internet by the Hispanic population in the United States is 80% (Molla, 2017). Although still below the average of general population, this number represents the closing of the gap in



the digital divide if we compare these numbers with the internet use among Hispanic adults and white adults in 2009, when the difference was around 15%.<sup>9</sup> This closing of the digital divide has a lot to do with the use and ownership of smartphones, and not with internet access services at home. So, while Hispanics have been seen as early adopters of smartphones, as it has been the social group with the highest ownership of them, these numbers hide a troubling reality: the fact that 23% of them only have access to the internet through their cellphones. This number can be read as disadvantageous if we consider it in relation to the 15% of African Americans and 9% of white people in the same situation.<sup>10</sup>

### 1.7. Public TV

The only television network with a public-oriented service changed its corporate profile in 2017. Vme, as a television network, did not close, but it was transformed from broadcast to cable television. It also stopped being a public television network linked to PBS and its group of affiliated TV stations. Vme became a commercial private channel, now offered in the cable package.

### 1.8. Pay TV

There is a large offering of paid television channels for the Hispanic population in the U.S. (Piñón and Rojas, 2011). These are composed of three main groups. The first one is integrated by global media corporations, such as 21st Century Fox, Disney, NBC/Comcast, Viacom, and Time Warner, which have localized their content in order to target U.S. Latinos, but also to Spanish-speaking audiences across Latin America. The second group includes corporations such as Univision and Telemundo, which, since their origin,

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<sup>9</sup> Broadband Outreach Center (2016, August 3). New Research Suggests Changing Digital Divide. *Broadband Outreach Center*. State of Utah. Retrieved from <https://broadband.utah.gov/2016/08/03/8800/>

<sup>10</sup> Molla, R. (2017, June 15). American Hispanics are still less likely to access the internet. *Recode*. Retrieved from <https://www.recode.net/2017/6/15/15808988/hispanics-internet-access-race-emarketer>

have had Spanish-speaking U.S. Latinos as their targeted audiences, and now offer a variety of pay television channels for this population. The third is integrated mainly by Latin American television corporations that seek to appeal to Latino audiences in the U.S., and they offer their content through their “international television brands,” such as GloboTV, Caracol International and Telefe International, among many others. The offerings on pay television are led in ratings by Galavision, a property of Univision, followed by Discovery en Espanol, and, in third Universo, a property of NBCU-Telemundo. There is a tie in fourth place between ESPN Deportes and Fox Deportes, followed by NatGeo Mundo, Discovery Familia and Fox Life.

### 1.9. Independent production houses

Independent production houses are at the center of innovation in programming in 2017. Argos, Fox Telecolombia/TeleMéxico, Teleset and BTF Media were essential in the production of fictional programming for Telemundo in 2017, while W Studios, BTF Media and Netflix were key to Univision and Televisa. The fourth original series from Telemundo that located the network ahead in ratings was made by Argos and Fox Telecolombia. Mexican Argos produced the fictional programming that put Telemundo ahead in ratings: *El Señor de los Cielos* 5, *El Chema* and *Señora Acero* 4. Telecolombia produced *Sin Senos Sí Hay Paraíso* 2. Furthermore, for Univision, Netflix, W Studio and BTF Media played a key role in the production of *La Piloto* (W Studios, in collaboration with Lemon Films), *La Jenny que Yo Conocí* (BTF) and *El Chapo* 1 and 2 (Netflix).

### 1.10. International trends

The U.S. Hispanic television has a dynamic and growing relation with the region through a variety of programming, production and distribution agreements. The transformation of Telemundo Studios into Global Telemundo Studios and the total restitution of Telemundo Internacional division as its distribution arm speak to the

increasing aspiration of Telemundo’s global presence with its super series. Meanwhile, Univision and the needs of the Hispanic market are starting to have an effect on the Mexican industry through its increasing influence on Televisa’s corporate structure.

2. Analysis of the year: national and Ibero-American premiere fiction

In 2017, a set of tendencies had an important effect on the number and modality of the new titles released during the year. The demise of MundoMax network at the end of 2016 was among the most relevant facts. The closing of MundoMax, on the one hand, had an effect with a reduction in the number or hours released; and, on the other hand, it had an impact on the number of countries of origin reflected in the programming during the year. In particular, there was an increase in the premiere of Brazilian fictional programs. Rede Record, with its “historical-religious” fictional narratives, became a key player as a content provider. Another important trend has been the surge of biopic miniseries. After the success of *Hasta que te Conocí*, in 2016, about the life of Mexican singer Juan Gabriel, a miniseries that became the most watched fiction that year, biopics in miniseries increased in number and visibility across the programming grid of television networks.

Table 1. Fiction broadcast in 2017  
(national and foreign; premieres and reruns; and co-productions)

<b>PREMIERE NATIONAL TITLES – 24</b>	46. <i>Mi Marido Tiene Familia</i> (telenovela – Mexico)
<b>Telemundo – 11 titles</b>	47. <i>A que no me Dejas</i> (telenovela – Mexico)
1. <i>El Chema</i> (telenovela)	48. <i>La Rosa de Guadalupe</i> (unitary – Mexico)
2. <i>La Doña</i> (telenovela)	49. <i>Sincronia</i> (series – Mexico)
3. <i>La Fan</i> (telenovela)	50. <i>Su Nombre Era Dolores</i> (miniseries – Mexico)
4. <i>Guerra de Idolos</i> (telenovela)	51. <i>Vino el Amor</i> (telenovela – Mexico)
5. <i>Jennie Rivera: Mariposa de Barrio</i> (telenovela)	<b>UniMás – 8 titles</b>
6. <i>Milagros de Navidad</i> (unitary)	52. <i>El Bienamado</i> (telenovela – Mexico)
7. <i>Sangre de mi Tierra</i> (telenovela)	
8. <i>El Señor de los Cielos 5</i> (telenovela)	
9. <i>Silvana sin Lana</i> (telenovela)	

10. <i>Señora Acero</i> (telenovela) 11. <i>Verdaderas Mujeres Asesinas</i> (docu-drama)  <b>UniMás – 3 titles</b> 12. <i>El Chapo</i> (miniseries) 13. <i>El Chapo 2</i> (miniseries) 14. <i>Fuerza de Creer</i> (webseries)  <b>HISPANIC CO-PRODUCTIONS</b>  <b>Telemundo – 5 titles</b> 15. <i>El Capo</i> (telenovela – U.S., Colombia, Mexico) 16. <i>El Cesar</i> (miniseries – U.S., Mexico) 17. <i>La Querida del Centauro</i> (telenovela – U.S., Mexico, Colombia) 18. <i>Sin Senos Sí Hay Paraíso</i> (telenovela – U.S., Colombia)  <b>Univision – 2 titles</b> 19. <i>Rosario Tijeras</i> (telenovela – U.S.; Mexico, Colombia) 20. <i>La Piloto</i> (telenovela – U.S., Mexico, Colombia)  <b>UniMás – 4 titles</b> 21. <i>Bloque de Búsqueda</i> (telenovela – U.S., Colombia) 22. <i>Blue Demon</i> (series – U.S., Mexico, Colombia) 23. <i>Blue Demon 2</i> (series – U.S., Mexico, Colombia) 24. <i>Blue Demon 3</i> (series – U.S., Mexico, Colombia)  <b>PREMIERE FOREIGN TITLES – 37</b>  <b>Azteca America – 8 titles</b> 25. <i>El Beso del Escorpión</i> (telenovela – Portugal) 26. <i>El Cazador</i> (series – Brazil) 27. <i>Un Día Cualquiera</i> (unitary – Mexico) 28. <i>Están Entre Nosotros</i> (unitary – Mexico) 29. <i>Mujeres Rompiendo el Silencio</i> (unitary – Mexico) 30. <i>Siempre Tuya Acapulco</i> (telenovela – Mexico) 31. <i>Verdades Secretas</i> (telenovela – Brazil)	53. <i>La Candidata</i> (telenovela – Mexico) 54. <i>La Hermandad</i> (series – Mexico) 55. <i>Moises y los Diez Mandamientos</i> (telenovela – Brazil) 56. <i>Mujeres de Negro</i> (telenovela – Mexico) 57. <i>La Niña</i> (telenovela – Colombia) 58. <i>La Tierra Prometida</i> (telenovela – Brazil) 59. <i>Totalmente Diva</i> (telenovela – Brazil)  <b>FOREIGN CO-PRODUCTIONS</b>  <b>EstrellaTV – 1 title</b> 60. <i>Maldita Tentación</i> (telenovela – Colombia, Mexico)  <b>UniMás – 1 title</b> 61. <i>Love Divina</i> (telenovela – Mexico, Argentina)  <b>RERUNS – 37</b>  <b>Azteca America – 9 titles</b> 1. <i>Así en el Barrio como en el Cielo</i> (unitary) 2. <i>Cada Quien su Santo</i> (unitary) 3. <i>Lo que Callamos las Mujeres</i> (unitary) 4. <i>Lo que la Gente Cuenta</i> (series) 5. <i>Ojos sin Culpa</i> (series) 6. <i>Olvidé que te Quería</i> (telenovela) 7. <i>Pasión Morena</i> (telenovela) 8. <i>Rabia</i> (series) 9. <i>UEPA: Un Escenario para Amar</i> (telenovela)  <b>EstrellaTV – 3 titles</b> 10. <i>Historias Delirantes</i> (series) 11. <i>Milagros</i> (unitary) 12. <i>Secretos</i> (series)  <b>Telemundo – 6 titles</b> 13. <i>Corazón Valiente</i> (telenovela) 14. <i>Decisiones</i> (unitary) 15. <i>Hasta que te Conocí</i> (miniseries) 16. <i>Historias de la Virgen Morena</i> (unitary) 17. <i>Más Sabe el Diablo</i> (telenovela) 18. <i>Santa Diabla</i> (telenovela)
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32. <i>Vis a Vis</i> (series – Spain)  <b>Telemundo – 5 titles</b> 33. <i>Imperio</i> (telenovela – Brazil) 34. <i>Mujeres Ambiciosas</i> (telenovela – Brazil) 35. <i>Por Siempre</i> (telenovela – Brazil) 36. <i>Las Reglas del Juego</i> (telenovela – Brazil) 37. <i>Volver a Amar</i> (telenovela – Chile)  <b>Univision – 14 titles</b> 38. <i>Las Amazonas</i> (telenovela – Mexico) 39. <i>Caer en la Tentación</i> (telenovela – Mexico) 40. <i>El Color de la Pasión</i> (telenovela – Mexico) 41. <i>Despertar Contigo</i> (telenovela – Mexico) 42. <i>La Doble Vida de Estela Carrillo</i> (telenovela – Mexico) 43. <i>Enamorandome de Ramón</i> (telenovela – Mexico) 44. <i>Hoy Voy a Cambiar</i> – (miniseries – Mexico) 45. <i>Mi Adorable Maldición</i> (telenovela – Mexico)	<b>Univision – 8 titles</b> 19. <i>Amor Bravío</i> (telenovela) 20. <i>Como Dice el Dicho</i> (unitary) 21. <i>José de Egipto</i> (miniseries) 22. <i>Milagros de Jesús</i> (miniseries) 23. <i>Mujer del Vendaval</i> (telenovela) 24. <i>Lo que la Vida Me Robó</i> (telenovela) 25. <i>Quiero Amarte</i> (telenovela) 26. <i>Rey David</i> (miniseries)  <b>UniMás – 11 titles</b> 27. <i>Abismo de Pasión</i> (telenovela) 28. <i>La C.Q.</i> (telenovela) 29. <i>Destilando Amor</i> (telenovela) 30. <i>Lady Vendedora de Rosas</i> (telenovela) 31. <i>Mañana es para Siempre</i> (telenovela) 32. <i>Mujer Casos de la Vida Real</i> (unitary) 33. <i>Por Siempre Joan Sebastián</i> (miniseries) 34. <i>Que Pobres Tan Ricos</i> (telenovela) 35. <i>Tiro de Gracia</i> (telenovela) 36. <i>Triunfo del Amor</i> (telenovela) 37. <i>La Viuda Negra</i> (telenovela)  <b>PREMIERE TITLES: 61</b> <b>RERUN TITLES: 37</b> <b>TOTAL TITLES BROADCAST: 98</b>
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Source: Obitel USA

In 2017, there were 61 premiere titles in fiction, only three titles fewer than the 64 released in 2016. This year, there were 3,705 premiere hours in fiction, which were 717 hours fewer than those that premiered in 2016. This represents a reduction of 16% in premiere hours, but, because of the increase of shorter telenovelas, series and miniseries, in terms of titles, this represents only a 4% decrease in relation to the premiere titles reported in 2016. This year, the annual national production showed an important increase in the number of premiere titles, with 24 in 2017, five more than the 19 that premiered in 2016. In relation to hours, the number remained somewhat stable, with 1,000 hours premiered in 2017, in comparison with 1,059 from 2016. However, in terms of percentages, national production represented 27%, which was higher than the 23.9% of 2016 in relation to total premiere production.

**Table 2. Premiere fiction in 2017: countries of origin**

Country	Titles	%	Chapters/ episodes	%	Hours	%
<b>NATIONAL (total)</b>	<b>24</b>	<b>39.3</b>	<b>994</b>	<b>28.3</b>	<b>1000:10:00</b>	<b>27.0</b>
<b>OBITEL COUNTRIES (total)</b>	<b>37</b>	<b>60.7</b>	<b>2513</b>	<b>71.7</b>	<b>2705:42:00</b>	<b>73.0</b>
Argentina	0	0.0	0	0.0	0:00	0.0
Brazil	9	14.8	666	19.0	806:21:00	21.8
Chile	1	1.6	54	1.5	105:00:00	2.8
Colombia	1	1.6	19	0.5	19:00:00	0.5
Ecuador	0	0.0	0	0.0	0:00:00	0.0
Spain	1	1.6	13	0.4	13:00:00	0.4
<b>USA (Hispanic production)*</b>	<b>14</b>	<b>23.0</b>	<b>555</b>	<b>15.8</b>	<b>564:20:00</b>	<b>15.2</b>
Mexico	22	36.1	1464	41.7	1481:11:00	40.0
Peru	0	0.0	0	0.0	0:00:00	0.0
Portugal	1	1.6	195	5.6	0:00:00	0.0
Uruguay	0	0.0	0	0.0	0:00:00	0.0
Venezuela	0	0.0	0	0.0	0:00:00	0.0
<b>CO-PRODUCTIONS (total)</b>	<b>0</b>	<b>0.0</b>	<b>0</b>	<b>0.0</b>	<b>0:00:00</b>	<b>0.0</b>
<b>USA Hispanic Co-productions*</b>	<b>10</b>	<b>0.0</b>	<b>439</b>	<b>0.0</b>	<b>435:51:00</b>	<b>0.0</b>
<b>Co-productions between Obitel countries</b>	<b>2</b>	<b>0.0</b>	<b>102</b>	<b>0.0</b>	<b>102:00:00</b>	<b>0.0</b>
<b>GENERAL TOTAL</b>	<b>61</b>	<b>100.0</b>	<b>3507</b>	<b>100.0</b>	<b>3705:52:00</b>	<b>100.0</b>

Source: Obitel USA – Nielsen

Mexican production decreased slightly in the number of titles, but, in relation to hours and percentages, it stayed stable. In 2017, 22 premiere titles came from Mexico, in comparison with the 25 premieres in 2016. But in relation to premiere hours, Mexican productions represented 40% of the total, only one percent less than the 41% in 2016. Mexico maintained its position as the largest provider of fictional programming for the U.S. Hispanic television market. Brazil had nine premiere titles, three more than the six that premiered in 2016. However, in relation to hours and percentages, the presence of the Brazilian production had an important jump in relation to the year before. The television networks also had Turkish productions, but they were scheduled outside of prime time, resulting in very low ratings. Surprisingly, Colombia decreased its presence as content provider, with only one title on the screens. But it is important to point out that Colombia's production has a key presence in the programming grids through the scheme of co-production, or production

by request, or as partners such as Sony/Teleset, Fox Telecolombia, TeleMéxico and W Studios.

Prime time is still the most important time period to premiere national productions. The only anomaly for this year was the premiere of two national titles in the afternoon. The first title was docudrama *Las Verdaderas Asesinas*, produced by Discovery for Spanish-speaking audiences. The second title was *Fuerza de Creer*, produced by Univision and W Studios, a webseries that premiered first on Univision's digital platforms, but it was later released on Sundays through UniMas network. These titles in the afternoon represented only 1.7% of the premiere national productions, while the rest of the national productions premiered in prime time, representing the remaining 98.3%. The premiere of foreign fictional programming shows a more diverse programming strategy across time slots.

Table 3. Chapters/episodes and hours broadcast by time slot

Time slot	National			Ibero-American			Total		
	C/E	%	H	%	C/E	H	%	C/E	H
Morning (06:00-12:00)	0	0.0	0:00:00	0.0	325	309:00:00	11.4	325	309
Afternoon (12:00-19:00)	17	1.7	17:00:00	1.7	696	856:00:00	31.6	713	873
Prime Time (19:00-23:00)	977	98.3	983:00:00	98.3	1492	1540:00:00	56.9	2469	2524
Night (23:00-06:00)	0	0.0	0:00:00	0.0	0	0:00:00	0.0	0	0
Total	994	100.0	1000:00	100.0	2513	2705:00:00	100.0	3507	3706

Source: Obitel USA – Nielsen

Table 4. Formats of national and Ibero-American fiction

Format	National				Ibero-American			
	Titles	%	C/E	%	H	%	Titles	%
Telenovela	15	62.5	890	89.5	891	89.1	27	73.0
Series	4	16.7	41	4.1	40	4.0	4	10.8
Miniseries	3	12.5	29	2.9	34	3.4	2	5.4
Telefilm	0	0.0	0	0.0	0	0.0	0	0.0
Unitary	1	4.2	20	2.0	20	2.0	4	10.8
Docudrama	1	4.2	14	1.4	14	1.4	0	0.0
Others (soap opera, etc.)	0	0.0	0	0.0	0	0.0	0	0.0
Total	24	100.0	994	100.0	1000	100.0	37	100.0

Source: Obitel USA – Nielsen



The telenovela is still the most used format in Ibero-American fiction. There were 42 telenovelas premiered in 2017, only three titles below the 45 that premiered in 2016. In 2017, eight series premiered, while in 2016 there were 14 titles. Also, five miniseries premiered, while in 2016 there was only one. It is important to note that the new strategy to produce miniseries in seasons that air during the same year has inflated the numbers. That is the case of *El Chapo 1* and *2* and *Blue Demon 1*, *2* and *3*, all of them premiering during the same year. The number of units premiered is mostly stable, with five titles in 2017, in comparison with the four titles that premiered in 2016.

**Table 5. Formats of national fiction by time slot**

Formats	Morn- ing	%	After- noon	%	Prime time	%	Night	%	To- tal	%
<b>Telenovela</b>	0	0.0	0	0.0	15	68.2	0	0.0	15	62.5
<b>Series</b>	0	0.0	1	50.0	3	13.6	0	0.0	4	16.7
<b>Miniseries</b>	0	0.0	0	0.0	3	13.6	0	0.0	3	12.5
<b>Telefilm</b>	0	0.0	0	0.0	1	4.5	0	0.0	1	4.2
<b>Unitary</b>	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
<b>Docudrama</b>	0	0.0	1	50.0	0	0.0	0	0.0	1	4.2
<b>Others (soap opera, etc.)</b>	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
<b>Total</b>	<b>0</b>	<b>0.0</b>	<b>2</b>	<b>100.0</b>	<b>22</b>	<b>100.0</b>	<b>0</b>	<b>0.0</b>	<b>24</b>	<b>100.0</b>

Source: Obitel USA – Nielsen

In regards to national production in 2017, 15 telenovelas premiered, which is exactly the same number as 2016. Also, there were four national series, the same number as 2016. The difference took place in the area of miniseries, with five premiered titles in 2017, in contrast to only one in 2016. In 2017, there was one docudrama and one unitary, two formats that were absent in national production in 2016.

**Table 6. Time period in which national fiction is set**

Time period	Titles	%
Present	14	58.3
Period	0	0.0
Historical	10	41.7
Other	0	0.0
<b>Total</b>	<b>24</b>	<b>100,0</b>

Source: Obitel USA Nielsen

In relation to the fictional time period in national productions, with the surge of miniseries, or the telenovelas based on the life of cartel drug lords, there was an unprecedented 41% of national productions located in the immediate past. If we would take into account all the Ibero-American fiction titles, the biblical productions offered by Rede Record would cause the visibility of “period” fiction productions to have risen.

**Table 7. The ten most watched titles**

	Title	Country of original idea or script	Channel	Format/genre	N. of chap. (in 2017)	Time slot	Rating	Share
1	<i>El Color de la Pasión</i>	Mexico	Univision	Telenovela	50	Prime time	9.6	18.8
2	<i>Vino el Amor</i>	Chile	Univision	Telenovela	93	Prime time	9.0	16.3
3	<i>El Señor de los Cielos 5</i>	USA, Colombia	Telemundo	Telenovela	95	Prime time	8.9	18.0
4	<i>El Chema</i>	USA	Telemundo	Telenovela	70	Prime time	8.8	17.3
5	<i>Sin Senos Sí Hay Paraíso 2</i>	Colombia	Telemundo	Telenovela	87	Prime time	7.8	14.7
6	<i>La Piloto</i>	Colombia	Univision	Telenovela	80	Prime time	7.4	14.9
7	<i>La Doble Vida de Estela Carrillo</i>	Mexico	Univision	Telenovela	72	Prime time	7.4	14.5
8	<i>Mi Marido Tiene Familia</i>	South Korea	Univision	Telenovela	90	Prime time	7.4	13.9
9	<i>La Doña</i>	Venezuela	Telemundo	Telenovela	101	Prime time	7.1	12.8
10	<i>El Chapo</i>	USA	Univision	Miniseries	5	Prime time	7.0	13.6
<b>Total productions: 10</b>				<b>Foreign scripts: 7</b>				
100%				70%				

Source: Obitel USA – Nielsen

In 2017, Telemundo consolidated its place as a powerful rival of Univision by positioning four broadcast titles in the top ten. It is important to stress that, of these four titles, three are Telemundo's original productions, but made by Argos Studios in different locations in Mexico. The fourth is a co-production of Fox Telecolombia. The fact that not one of these productions was made in Miami stresses how important the strategy of co-productions is, or production by request from Ibero-American partners, in particular from Mexico and Colombia. Televisa still is the most important provider of fictional content; however, it is now evident that it has lost the absolute hegemonic position that it enjoyed for decades. From occupying at least eight or nine of the most watched titles every year, the Mexican media corporation has only three titles and one co-production (*La Piloto*, with Univision and W Studios). In contrast, Univision arises with co-productions *La Piloto* and *El Chapo*, with Netflix. Gradually, Univision is leaving its position as only a distributor and beginning to take its place as a producer of original content, following the co-production model, which allows the corporation to connect culturally with audiences, to have access to a critical mass of professionals from the main Ibero-American centers of production, and to benefit from low production costs across the region.

**Table 7a. The ten most watched national titles**

	<b>Titles</b>	<b>Country of original idea or script</b>	<b>Channel</b>	<b>Format/genre</b>	<b>N. of chap. (in 2017)</b>	<b>Time slot</b>	<b>Rating</b>	<b>Share</b>
1	<i>El Señor de los Cielos 5</i>	USA/ Colombia	Telemundo	Telenovela	95	Prime time	8.9	18
2	<i>El Chema</i>	USA	Telemundo	Telenovela	70	Prime time	8.8	17.3
3	<i>Sin Senos Sí Hay Paraíso 2</i>	Colombia	Telemundo	Telenovela	87	Prime time	7.8	14.7
4	<i>La Piloto</i>	Colombia	Univision	Telenovela	80	Prime time	7.4	14.9
5	<i>La Doña</i>	Venezuela	Telemundo	Telenovela	101	Prime time	7.1	12.8
6	<i>El Chapo</i>	USA	Univision	Miniseries	5	Prime time	7.0	13.6

7	<i>Silvana sin Lana</i>	Chile	Telemundo	Telenovela	15	Prime time	6.6	11.7
8	<i>Jenni Rivera: Mariposa de Barrio</i>	USA	Telemundo	Telenovela	91	Prime time	6.5	12.9
9	<i>Señora Acero 4: la Coyote</i>	USA	Telemundo	Telenovela	40	Prime time	6.0	12.6
10	<i>El Chapo 2</i>	USA	Univision	Miniseries	11	Prime time	5.3	10.9
<b>Total productions: 10</b>				<b>Foreign scripts: 4</b>				
100%				40%				

Source: Obitel USA – Nielsen

The list of the ten most watched national titles reveals a somewhat different landscape. Here, Telemundo dominates the list; however, Univision, a corporation that traditionally has been absent, won three places. Out of the top ten titles, eight are co-productions with international partners. For Telemundo's productions, Argos placed four of them produced in Mexico within the list, and there is one from Fox Telecolombia. For Univision, Netflix placed two series and one was Univision's co-production with Televisa, W Studios and Lemon Films.

**Table 8. Audience profile of the ten most watched titles:  
gender and age**

Titles		Channel	Gender %	
			Women	Men
1	<i>El Color de la Pasión</i>	Univision	66.5	33.5
2	<i>Vino el Amor</i>	Univision	65.6	34.4
3	<i>El Señor de los Cielos 5</i>	Telemundo	53.7	46.3
4	<i>El Chema</i>	Telemundo	51.2	48.8
5	<i>Sin Senos Sí Hay Paraíso 2</i>	Telemundo	60.8	39.2
6	<i>La Piloto</i>	Univision	64.1	35.9
7	<i>La Doble Vida de Estela Carrillo</i>	Univision	65.8	34.2
8	<i>Mi Marido Tiene Familia</i>	Univision	64.5	35.5
9	<i>La Doña</i>	Telemundo	59.2	40.8
10	<i>El Chapo</i>	Univision	50.8	49.2

	Titles	Channel	Age group %					
			2-11	12-17	18-24	25-34	35-49	50+
1	<i>El Color de la Pasión</i>	Univision	10.1	5.4	6.3	13.1	25.5	39.6
2	<i>Vino el Amor</i>	Univision	12.1	5.2	6.2	13.3	23.2	40.0
3	<i>El Señor de los Cielos 5</i>	Telemundo	8.7	4.7	6.7	20.9	31.1	27.9
4	<i>El Chema</i>	Telemundo	8.3	4.3	8.0	20.0	30.9	28.5
5	<i>Sin Senos Sí Hay Paraíso 2</i>	Telemundo	9.1	4.2	7.9	17.6	27.2	34.0
6	<i>La Piloto</i>	Univision	10.6	4.5	5.3	15.5	26.3	37.8
7	<i>La Doble Vida de Estela Carrillo</i>	Univision	12.8	4.9	5.2	13.4	24.6	39.0
8	<i>Mi Marido Tiene Familia</i>	Univision	12.3	5.0	4.8	15.4	23.3	39.1
9	<i>La Doña</i>	Telemundo	9.1	4.8	7.5	14.9	28.5	35.2
10	<i>El Chapo</i>	Univision	8.6	3.2	5.2	16.6	29.2	37.2

Source: Obitel USA – Nielsen

The distribution of the audience along the lines of gender follows a similar pattern that has been observed in previous years. Televisa's traditional telenovela formula brought the corporation to occupy the first, second and eighth places in the list, with an average of 65% of women and 35% of men. *La Piloto*, a telenovela that tries to stay away from the traditional formula (following a similar strategy used by Telemundo with its super series), also shows an average audience of 65% of women and 35% of men. In contrast, Telemundo's original production, and in particular its super series, offer an audience average balance of 53% to 51% of women and 47% to 49% of men. This is the formula that brought male audience to Telemundo, allowing the network to increase its audience segment. An interesting case is *El Chapo*, from Univision, which benefited from the prestige of Netflix and its original series *Narcos*. *El Chapo* was watched by an audience composed of 50% of women and 50% of men. In contrast with *La Piloto*, which showed the same audience profile of traditional telenovelas, *El Chapo*, based on the architecture of the series, with a limited number of episodes and its inclusion in Sunday's programming, offered a very different consumption logic from that of the everyday telenovela.

In the same way, Telemundo's super series show a much younger audience profile than the audiences for traditional telenovelas. Here, it is key to point out that audience ratings for the first and second most watched titles, broadcast by Univision and produced by Televisa, take into account audiences from all age groups (from 2+). However, for networks as well as for advertisers, a rating achievement is measured specifically with the 18-49 age range. It is based on these considerations that Telemundo's productions were announced by the press and trade magazines as the ratings winners of the year, placing its productions as the most watched fiction in 2017. In particular, *El Señor de los Cielos 5* won the ratings race in the 18-49 age segment, allowing Telemundo to claim the position as the ratings winner for 2017 for the first time in the network's history.

### 3. Transmedia reception

One of the most interesting characteristics of the success of *El Señor de los Cielos* has been the continuing expansion of the narrative universe. This expansion has also been helped by contemporary news events, which have been reconstructed as part of a fictional immediate past with the launching of the new super series spin-off, *El Chema*. Mauricio Ochman, who plays character Chema in *El Señor de los Cielos*, returns as the protagonist of his own super series. *El Chema* is a new version of the life of Joaquín 'El Chapo' Guzmán. The new super series starts with the escape of the protagonist through a tunnel, in order to get the audiences engaged, in reference to the infamous escape of the cartel drug lord, while connecting them with the news coverage of his very recent capture in real life. After the first episodes, the super series jumps to the past, when Chema was still young, in order to tell his family's story and show how he became one of the most famous drug dealers in Mexico. In the telling of this character's personal story, the super series introduces the audience to many of the characters that they already know from the narrative universe of *El Señor de los Cielos*, though in this case the series explores their pasts. Rafael Amaya, in his character

of Aurelio Casillas in *El Señor de los Cielos*, had special appearances in *El Chema*. This extended the characters' cosmos, trajectories and possible narratives, which intersected within these series at an intertextual level that only consolidates the fictional universe, but that constantly reproduces very well-known historical events, freely playing between what is real and what is fiction. Also, Rafael Amaya, in his character of *El Señor*, has special cameos in the first episodes of *Señora Acero* and *The Queen of the South*, a production of USA Network. It is important to point out that USA is a property of NBC-Universal, the media corporation that owns Telemundo. Such connections in transmedia universes only reveal a corporate strategy for media synergies. *El Chema* became Telemundo's second most watched fiction in 2017, occupying the fourth place in the list, but also occupying the second place among the 18-49 age segment, just after *El Señor*.

#### 4. Highlights of the year

While super series consolidates audiences and fiction continues to be the key means to attract them, sports, special events and reality shows are also central content in the programming strategy to appeal to audiences during weekdays as well as weekends. In particular, in the case of special events, Univision attracted important audience numbers with *Premios Lo Nuestro* (9 million), *Latin Grammy Awards* (8 million), *Premios Juventud* (7.9 million), *Premios TVNovelas* (7.1 million).<sup>11</sup> In the meantime, Telemundo broadcast *Premios Tu Mundo* (5.8 million), *Billboard Latin Music Award* (4.9 million) and *Latin American Music Awards* (4.3 million).<sup>12</sup>

For sports, boxing on Friday nights, soccer on weekends, and wrestling on Sundays are key audience magnets. Univision has the television rights to Mexican Soccer League as well as Major U.S.,

<sup>11</sup> UCI (2017). Press Room. *Univision Corporate*. Retrieved from <https://corporate.univision.com/corporate/press/>

<sup>12</sup> Telemundo (2017). Press Releases. *NBCUMV Corporate*. Retrieved from <https://www.nbcumv.com/programming/telemundo/news>

European, and South American Soccer Leagues. Univision bought the television rights to MX Soccer League from Azteca America, leaving Telemundo with few options. The final round-matches of MX Soccer League (a combination of two matches) gave Univision 4.9 million cumulative audiences. Meanwhile, Telemundo broadcast the matches of the European leagues and won the rights to the 2018 World Cup as well as the rights to the Confederations Cup in 2017. The Confederations Cup gave an average of 1.2 million audiences per match, and a cumulative audience of 16 million in the Cup in general.<sup>13</sup> While, over the weekend, soccer is key for audiences, on Friday nights the three networks Telemundo, Azteca America and EstrellaTV have a rating war with boxing matches.

In the realm of reality TV, Univision bet on *Pequeños Gigantes* and *La Reina de la Canción*, two artistic-talent oriented contests for its prime time slot during weekdays, with not very satisfactory results. For EstrellaTV, reality TV has been central to its programming strategy because of its lack of access to fictional programming and the network's reliance on in-house, low-cost productions, with a reasonable degree of success with *Tengo Talento*, *Mucho Talento* (16 seasons) and *Rica Famosa Latina* (five seasons).

## 5. Theme of the year: TV fiction on video on demand platforms

### *VoD landscape of the country*

The development of video on demand (VoD) services, based on different modalities of access, triggered a landscape in which different streaming services based on different business models coexist. Since 2010, five main business models emerged: the one based on advertising (AVoD); the one based on subscription (SVoD); the transactional model (TVoD); the catch-up model; and a variety of

<sup>13</sup> Muller, A. (2017, July 3). Telemundo Deportes averaged record 1.2 million viewers for Confederations Cup tournament. *Word Soccer Talk*. Retrieved from <http://worldsoccertalk.com/2017/07/03/telemundo-deportes-averaged-record-1-2-million-viewers-confederations-cup-tournament/>



hybrid models of VoD. The media corporations that became the leading forces in each business model are: YouTube, Yahoo, Crackle (AVoD), Netflix, Hulu, Claro TV (SVoD), Amazon (TVoD), HBO Go, Telecine Play; Globosat Play; Fox Play (catch-up TV); and different hybrid models that combined free access, renting, selling, signing up for, or catching up on TV, exemplified by Net Now, Vivo Play, Claro Video, Globo Play (Lacalle, Castillo, Greco and Prezia, 2018).

### ***New business model on VoD in the country***

The rise of the subscription business model, in particular, generated the incursion of important actors who initially started working with other business models, but now they want to get a slice of the VoD market. Among the most important recent players for SVoD are Amazon Prime, YouTube Red, Facebook, Apple and CBS All Access.

By 2017, the ten most important corporations in SVoD in the United States were Netflix, Amazon Prime, Hulu, MLB.TV, HBO Now, Starz, YouTube Red, Showtime, CBS All Access and Sling TV.<sup>14</sup> The tenth place was occupied by Sling TV, which is relevant, because it signals one of the most important transformations in the digital television landscape. Sling TV was launched in 2015 by Dish Network, and it signals the entry of Virtual Multichannel Video Programming Distributor (VMVPD). Under this modality, an aggregated package of television channels is available online live on demand, but distributed through the internet. The services of VMVPDs allow consumers to eliminate television cable by accessing television channels through a computer, an application on a smartphone, or by a videogame console. The main player engaging in this new mode is the telecom sector, particularly the main cable providers. This modality of hiring “cable” online while cutting the

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<sup>14</sup> Lopez, M. (2017). YouTube Red Climbs the List of Top Ten OTT Platforms. *The Video Ink*. Retrieved from <https://www.thevideoink.com/2017/11/09/top-ten-ott-platforms-subscriber-numbers-youtube-red/>

cord to cable TV emerged in the offer from Sling TV known as the “skinny bundle”. This modality is based on the offering of a group of television channels known as “the package”, which cable providers have offered for decades; however, the difference is that the skinny bundle consists of a selected group of channels, with lower prices than the traditional cable bundle, but, in this case, through digital properties and the internet.

It is likely that the emergence of the VMVPD services will give new life to pay television through the operators of cable television. The precedent of this attempt to maintain online television’s relevance was set by the launching of TV everywhere. However, as the press has reported, there were a series of legal problems in relation to copyrights in digital environments, as well as the role played by non-user-friendly digital platforms, which prevented these services to flourish under the assault of more user-friendly platforms such as Netflix, Hulu or YouTube.<sup>15</sup>

But now, cable television providers offer bundles (a package of certain channels) through the internet, with more user-friendly interfaces, and with a whole range of new possibilities in services and support for the consumers. Reports on television distribution and consumption in 2018 show a new surge of online services such as DirecTV Now, Spectrum Stream, Comcast Watch, Hulu Live TV, Sony PlayStation Vue, and FuboTV.

Although households might be cutting services of cable television, the introduction of new “cordless” services and television packages through the internet have subtly changed the combination of access to television, through broadcasting television, cable, VoD or VMVPD. This new landscape of television consumption presents the challenge of the unknown, tied to the kinds of decisions consumers might make, types of industrial offers, and the modalities and routes of consumption of any particular content.

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<sup>15</sup> Wolk, A. (2018, February 13). It’s Cord Shifting. *Decider*. Retrieved from <https://decider.com/2018/02/13/vmvpds-cord-shifting-vs-cord-cutting/>

### ***Telemundo's El Señor de los Cielos and Univision-Netflix's El Chapo in the VOD era***

English-language television formats, in particular series, have never been a menace to telenovelas in prime time Hispanic television. However, the rise in the offering of SVoD services and the increase of consumption through different digital and mobile platforms have changed the landscape of Hispanic television. The new efforts from Spanish-language television to be relevant to young and male audiences resulted in the production of shorter telenovelas with fewer episodes that are nevertheless full of action, that exhibit high production values and that have plots that move away from the traditional melodramatic love story, exemplified by the rise of the super series.

A key product that signaled a turn in production strategies was *El Señor de los Cielos*. The decision to produce a second season of *El Señor de los Cielos* was a watershed in Hispanic television production, with a huge impact on industry dynamics. It is important to point out that one of the main factors that made the first season of *El Señor* so important was the increasing and continuing growth of its consumption through digital platforms through different VoD modalities. This increasing demand for streaming programming was a key factor in the creation of a whole transmedia strategy in digital platforms in order to widen the audiences' following. The success and continuity of *El Señor de los Cielos*, with its sixth season about to premiere in May 2018, was due in part to the high consumption pattern showed on YouTube, Telemundo.com, Netflix and social media. This emerging consumption pattern had a ripple effect on other successful fictional productions that have also seen continuity through new seasons, such as *Señora Acero*, *Sin Senos Sí Hay Paraíso*, *La Querida del Centauro* and now the highly awaited second season of *La Reina del Sur*.

The answer to these developments by Univision and Televisa has been expressed through different modalities. In 2014, Televisa, in association with RTI Colombia, had already co-produced, for Un-

iMás, *La Viuda Negra*, a narconovela that also had a second season in 2016. In 2017, Univision took an important step by connecting to the local, the regional and the global, through its association with Netflix to co-produce miniseries *El Chapo*. This miniseries premiered in April 2017, before its wide distribution through the VoD services of Netflix for national or global audiences. This co-production is important in many ways. It is situated at the intersection of the transformation of regional and global television content distributed by Netflix original production in many countries, and the transformation of Spanish-language television at regional levels. The co-production of *El Chapo* tried to take advantage, on the one hand, of the success brought by the production of *Narcos* as Netflix's flagship original production to penetrate the Latin American television market; and, on the other hand, by leveraging the continued success of narconovelas in their new iteration as super series in the Hispanic television market. With this production, Univision and Netflix appeal simultaneously to two potential audiences: the Spanish-speaking Latinos in the United States and Latin America; and the English-speaking viewers in the United States and global audiences (the series has English subtitles).

The series starts with video material taken from the real news coverage that was broadcast around the world when Joaquín Loera Guzmán, alias El Chapo, was recaptured. The whole introduction of the series is integrated with these real news images to establish a historical reference to a somewhat immediate past, and also to the fictional narrative universe. So, the introductory scenes are narrated in voice-overs with the anchors' descriptions from these real newscasts that offered context, in that time, to what their audiences were watching on their screen in real time. Such footage also emphasized the importance of the apprehension of this globally well-known drug dealer. But, there is a key moment within this sequence in which the real world is fused with the fictional world. This line is blurred when we see El Chapo in an archival news clip at the precise moment when the police are taking his digital finger prints. The

sequence then cuts to a similar shot, with the same scene settings, color and lighting, but, instead of seeing Joaquín Loera Guzmán, we see Marco de la O, the actor who plays his role. This moment begins the fictional reconstruction of the story of *El Chapo* through a dramatization strategy that claims a high level of attachment to recent historical events. By using this device, the real and news-oriented video sequence is linked and fused with the fictional narrative around the life of Joaquín Loera Guzmán. Because the series is not a documentary, yet uses actual news footage, it establishes a complex relationship between reality and fiction. This relationship allows the series to explore narratives with a cultural status of pseudo-documentary for the “guilt free” consumption of young male audiences. After this introduction, the series has a time-jump to the past, to the moment when El Chapo makes his first bold and strategic move to challenge the hegemonic position of Amado Carrillo in Mexico, by looking for a deal, directly with Pablo Escobar, as the main drug lord in Colombian narcotraffic. Then, the series goes from an initial process of destabilizing the relationship between reality and fiction to a process of intertextuality within a fictional universe that is interconnected through different super series, series or narconovelas that audiences can recognize. For example, when El Chapo visits Colombia seeking to meet Pablo Escobar, the television audience realizes that Pablo Escobar is played by Luis Mejia, who is the same actor that played young Pablo Escobar in Colombian narconovela *Pablo Escobar, el Patron del Mal*, produced by Caracol TV. This intertextuality that appears in different fictional products seems to strengthen a constructed “authentic” characteristic through a series of interconnections in the context of a self-referential fictional universe and its rising cosmos of stars and their transmedia characters.

Narconovelas have enjoyed success, to a great degree, from incorporating real past events and their fictional recreation, creating a confusion between reality and fiction. For example, the production of *El Cartel de los Sapos* is based on a book written by a real member of the Medellin drug cartel, who became a snitch for the DEA

and thus a protected witness. He wrote the book under the argument that this was a historical document told from the perspective of a real ex-member of the organized crime cartel. Mauricio Duarte (2014) argues that, when Andres López López, author of *El Cartel*, inserted himself as the narrator of the novel, but also as a character (as a protected witness), he destabilized the relationship among what is real and true, what is fiction and what is a constructed lie. The same destabilizing strategy between reality and fiction has been used in super series such as *El Señor de los Cielos* and *Señora Ace-ro*, with their continuous references, not only to specific political realities, but to real events, real people and figures from the political and economic national spheres, in particular from Mexico, but also from Venezuela, Colombia and the USA. The connection of real news coverage and the subsequent narrative based on real and historic events emerged in the context of a regional “war on drugs”. This real-world relevance seems to give *El Chapo* and, in some moments, *El Señor de los Cielos* a pedigree, marking them as acceptable and important cultural products, gaining a cultural and taste status that rises above the commonly identifiable lowbrow status of the melodrama in telenovelas.

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# 10

## URUGUAY: TELEVISION CHANGES ... TO STAY THE SAME<sup>1</sup>

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### 1. Uruguay's audiovisual context in 2017

Television transformations due to penetration of internet and the development of platforms on demand have led to the idea of the end of linear television or the era of post-television. In the Uruguayan panorama, it is possible to identify some signs of change in some national actors linked to television, which will be analyzed at the end of the chapter, but rather than showing a real transformation, they seem to be small variations that perpetuate historical trends in the characteristics of the offer and the decisions of programming, as well as in the decisions of production. These actors opt for entertainment – especially in the form of a contest – and for longer newscasts; the absence of national fiction persists, except on public television, although it is scarce in several ways.

#### 1.1. Open television in Uruguay

The preparation of this year's chapter has encountered some obstacles that also reveal the audiovisual context. Obitel Uruguay's

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<sup>1</sup> This chapter was prepared thanks to data provided by Kantar Ibope Uruguay. We appreciate this contribution, particularly the collaboration of Carolina Arigón and Valentina Cal. In this edition we also had the contribution of Equipos Mori – Marcos Aguiar and Claudia Rafaniello. With their information we were able to complete the necessary inputs for this chapter and to whom we are thankful. Some other missing data were rebuilt from information published by the press.



report in previous years was made from information provided by what is now Kantar Ibope: the company gave us, in addition to the rating and share of the fictions, the programming list of each channel with data that allowed us to estimate the emission hours by genres. This year, it provided the usual information, but not that of TNU. The public channel is not subscribed to the service and, therefore, the company did not disclose its information. This had consequences on the data we offer. Graph 1 only shows the rating and share of the private channels, and Graph 2, which records the composition of the offer by genres and the volume of hours corresponding to each genre, refers only to the three commercial channels: Teledoce, Saeta and Monte Carlo.

For tables 1 and 2 we have resorted to information provided by Equipos Mori, which allowed us to reconstruct TNU’s programming, its composition of genres, frequency of emission and approximate duration of Ibero-American fictions. It also gave us audience data that allowed us to analyze some aspects. However, as it is a measurement with a different methodology, we did not consider it convenient to include them in the tables and graphs.

**Chart 1. Open national television chains/channels in Uruguay**

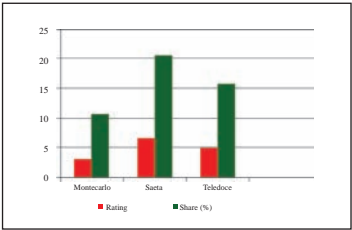
Private chains/channels (3)	Public chains/channels (2)
Montecarlo (channel 4) Saeta (channel 10) Teledoce (channel 12)	Televisión Nacional del Uruguay – TNU (channel 5) TV Ciudad (Municipality of Montevideo’s channel)
TOTAL CHANNELS = 5	

Source: Obitel Uruguay

**Graph 1. TV rating and share by broadcaster**

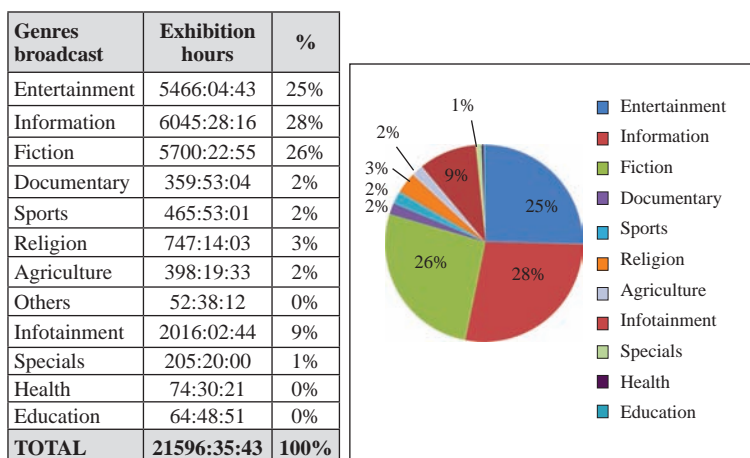
Broadcaster	Rating	%	Share	%
Montecarlo	4.5	24	12.2	24
Saeta	8.1	43	22.1	43
Teledoce	6.4	34	17.4	34
TNU	n/d	n/d	n/d	n/d
TV Ciudad	n/d	n/d	n/d	n/d
TOTAL	19	100	51.7	100%

Source: Kantar Ibope Uruguay



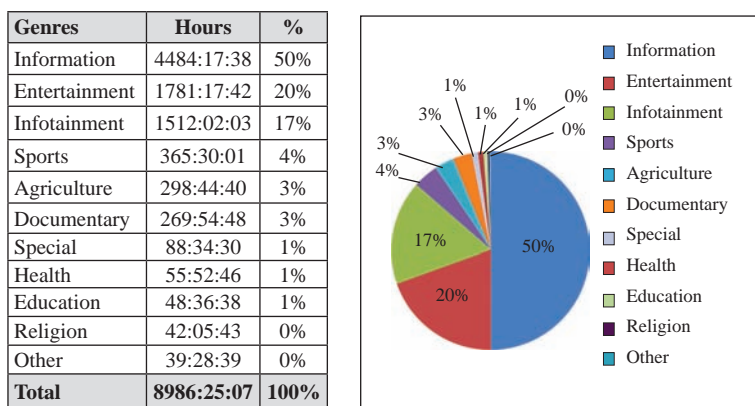
The total audience dropped one point compared to 2016. Tele- doce and Montecarlo decreased their rating and share compared in respect to that year. On the other hand, Saeta experienced a slight increase, from 7.8 in 2016 to 8.1 in 2017, which represented 43% of the total rating and share of 2017.

**Graph 2. Genres and hours broadcast on TV**



Source: Obitel Uruguay from Kantar Ibope data

**Genres of national production in private channels**



Source: Obitel Uruguay from Kantar Ibope data

These graphs show that the composition by genres of all origins maintains the same trends as previous years, even without including TNU's programming. The three predominant genres in screen hours are entertainment, information and fiction. If only national production is considered, 50% of the screen time corresponds to information, one percentage point more than in 2016, and, together with entertainment (20%) and infotainment (17%), they cover almost all the time occupied by national products.

## 1.2. Audience trends over the year

Audience in 2017 was in accordance with this offer composition. The highest rating values were recorded in entertainment, mainly in the reality show formats.<sup>2</sup> In this area, two national programs stand out: *Master Class* (Teledoce), the most watched program in its schedule, with 7 and 9 rating points<sup>3</sup>; and *Master Chef* (Saeta), which reached audience peaks of 21 rating points.<sup>4</sup>

Telenovelas, with an annual rating of 10.3%, and the news, with 9.5%, are the other programs that obtained a greater audience. It is the third consecutive year that the preference for the Turkish telenovelas, with rating of 17 points and share of 27, were confirmed. Most of the titles were broadcast by Saeta, which, together with the success of *Master Chef*, helps to explain why this TV station has occupied the first place in capturing audiences (Graph 1).

## 1.3. Advertising investments of the year: in TV and in fiction

Projections of the advertising market for 2017 were of a growth of 4% of the global investment in marketing, US\$ 11,242,000 more than in 2016, year in which the figure was US\$ 263,923,000.<sup>5</sup>

Television maintained its predominance in the distribution of the advertising budget in 2017, when it concentrated 33% (US\$

<sup>2</sup> Data from MW Telereport Kantar Ibope Uruguay software.

<sup>3</sup> *El Observador*, July 31, 2017.

<sup>4</sup> *El Observador*, March 27, 2018.

<sup>5</sup> The data of the advertising market has been taken from the *Estudio del mercado publicitario Uruguayo 2016*. September 2017, carried out by Equipos Consultores.

91,220), although with a slight decrease compared to 2016 (US\$ 92,237; 35%), while the internet showed an increase in 2017 (US\$ 56,801; 21%) compared to 2016 (US\$ 46,628; 18%). Since 2016 the radio remained at 15% of the budget and the written press had 8%, down one percentage point with respect to 2016. Saeta is the channel that had the highest advertising investment, with 36%, followed by Teledoce, with 28%. Montecarlo stands out for its low percentage, 3%, one point less than VTV, which is a cable channel.<sup>6</sup>

From the media audited<sup>7</sup> by Kantar Ibope, 86.66% of the advertising investment corresponded to television. The advertising in fiction (of all types) reached 1,933,756 seconds in 2017, less than in the previous year.<sup>8</sup>

#### 1.4. Merchandising and social merchandising

The advertisements in Ibero-American fiction of the year were mostly of teleshopping: 194,526 seconds of the total advertising time.<sup>9</sup> Beauty, hygiene and health products followed in volume (with 375,978 seconds), in addition to newspaper *El País*, with 123,134 seconds.

Social merchandising was present with themes related to addiction and abuse. The incorporation of a character with Touret syndrome in Argentine fiction *Las Estrellas* could be considered social merchandising. In national fictions, similar practices were observed, such as the inclusion of an actor with Down syndrome in *El Mundo de los Videos*.

#### 1.5. Communication policies

The Law on Audiovisual Communication Services (LSCA), passed in 2014, remained unregulated during 2017. In October, the

<sup>6</sup> Equipos Consultores.

<sup>7</sup> It audits some newspapers, magazines, a national cable channel (VTV), four open TV channels and advertising on public roads.

<sup>8</sup> Data by Evolution Monitor of Kantar Ibope.

<sup>9</sup> According to data from Evolution Monitor of Kantar Ibope, the total advertising on these titles was of 690,989 seconds.

Audiovisual Honorary Services Advisory Commission (Chasca) was created, established by law, but the parliamentary representative who must integrate it was not appointed. On the other hand, since the law was passed, the organism to which the Chasca should advise, the Council of Audiovisual Communication (CCA), was not constituted either. In March 2018, the parliamentary commission was installed, which has to make the proposal for the integration of the four CCA members to be submitted to the General Assembly for consideration.<sup>10</sup> In December 2017, the Executive Branch presented a proposal for a Regulatory Decree of the Law, which has been discussed by the Chasca since then.<sup>11</sup>

## 1.6. ICT trends

The number of internet users in Uruguay has had a constant increase, reaching 88% – almost 2.9 million users (in a population of just over 3 million). The percentage of households with Wi-Fi reached 71%. This growth covers all ages and increases in the highest age brackets: in people over 65 years, the percentage of users is 70%, 14 points more than in 2016.<sup>12</sup> The digital gap between socioeconomic statuses (SES) continues to decrease and tends to disappear. The percentage of users of high SES is 96%; of middle SES is 88%; and of low SES is 81%. All levels increased compared to 2016, mainly in the last two segments.

In 2017 the penetration of smartphones continues to increase and reached 86%. In line with this expansion, the cellphone is the device most used by internet users (93%) and the home continues to be the preferred place for connection (94%). SmartTVs continue to

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<sup>10</sup> The body is composed of five members: one is appointed by the Executive Branch, which will occupy the presidency and will have a double vote; and the other four must be approved by the General Assembly.

<sup>11</sup> However, for some aspects of the LSCA that do not need regulation, the Regulatory Unit of Communication Services (Ursec) operates as a controller body and has applied some sanctions, for example, for non-compliance with advertising times, to the three private channels. Martín Viggiano, *El Observador*, June 27, 2017.

<sup>12</sup> Data from *El Perfil del Internauta Uruguayo 2017*, Radar Group, which can be accessed by subscription at [www.gruporadar.com.uy](http://www.gruporadar.com.uy).

grow in 2017, rising to 31%. However, the number of people who watch series or movies exclusively by cellphone grows: 25%.

Watching TV channels online is the use with the lowest percentage: 17%. When watching movies or series online, YouTube maintains the predominance, with 66%, but Netflix reached 620,000 users – it rose from 45% in 2016 to 64% in 2017 –, to which was added the arrival of HBO Go, which since last year has allowed to subscribe independently of other services.

## 1.7. Public TV

Uruguayan open television system has two public channels: the oldest is TNU and the most recent is TV Ciudad (1996), which depends on the Municipality of Montevideo and became an open digital signal in 2015. Two relevant aspects stand out in 2017: the management of both television stations changed; it is not possible to access audience measurements of public television.

TNU has historically changed management at the pace of changes in the conduction of the national government, even when it is the same political party that governs, as it has been the case since 2005. In addition to being a sign of lack of autonomy, this goes against any long-term development project.

Between 2005 and 2017, there were six managers in TNU. The longest administration was that of writer and documentalist Virginia Martínez (2010-2015), removed during the second government of Tabaré Vázquez. Since then, three names have followed in the management of the channel: Joaquín Constanzo, Adriana González and, in December 2017, Ernesto Kreimerman, journalist and shareholder of some radio companies. This last condition motivated the questioning by some social organizations, which pointed out it violated the LSCA as it establishes that the directors of the public media will not be able to have links with radio, television or advertising companies.<sup>13</sup>

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<sup>13</sup> *Búsqueda*, from December 28, 2017 to January 3, 2018.

There were also changes of management in TV Ciudad in the last five years. The last one occurred in May 2017, although with some continuity because the new director was already working in the channel.<sup>14</sup>

The second relevant aspect is the absence of audience measurements. This accounts for a conception in the management of public television and therefore public funds, which takes no notice of the audience.

In previous reports we did not have data from TV Ciudad, because, first, it was a cable signal and, then, an open digital one, which was not measured by Kantar Ibope. We did have data from TNU, whose coverage was greater. In 2017, accessing to some type of audience data was difficult. Kantar Ibope decided not to disclose more information about TNU because the channel was not willing to subscribe to the service. We asked to the channel's management and they told that the service was too expensive and not very reliable. They said that they were not using another type of service either.

It is clear that one of the characteristics of public television is that it does not depend on rating to sell advertising and survive, different from what private channels do. This would allow to develop different proposals released from the urgencies, which is undoubtedly an advantage that should result in quality, expansion of the offer, search for originality, and contribute to the competition in its best sense, as other public television stations in the world have done. However, this does not imply that it is not necessary and relevant to know how many, who and how they are watching. This disregard for the audience will also have its correlation in the productions financed with public funds.

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<sup>14</sup> The review of the interviews carried out by the press and also those carried out by *Obitel* Uruguay show a lack of projection that is summarized in the statements of Claudio Invernizzi: "the underlying problem is that there is no direction [...], there is no design of what is wanted from public media and then each director tries to do things his way". *Idem*.

## 1.8. Pay TV

Since the incorporation of Uruguay to Obitel, in 2008, there has been a systematic growth in the number of pay TV services. However, since the second half of 2016, a downward trend has been observed for the first time: 731,753 services in 2016 fell to 719,823 in 2017.<sup>15</sup> This trend was also confirmed in *El Perfil del Internauta Uruguayo 2017*: the population living in households with television for subscribers reached 70%, which was a decrease of two percentage points compared to 2016.

The distribution of operators in Montevideo indicates the highest percentage for Cablevisión, with 24% of the total, followed by DirecTV Uruguay, with 19%, TCC, with 18%, Nuevo Siglo, with 17%, Montecable, with 15%, and Multiseñal, with 7%. In the rest of the country, the largest percentage was carried out by local operators and 30% by DirecTV.

According to the study carried out by Opción Consultores, *Monitor de Sectores Productivos*, 56% of the companies in the sector expected a retraction of the business in 2017, while in the previous year the percentage of expectations to the downside was lower, 43%. The emergence of new actors and service systems, added to the fact that consumers search content on the internet at lower cost, were the reasons given.<sup>16</sup> If we consider Netflix's growth data, the availability of HBO Go as of this year, plus the penetration of the internet in all the social levels, it is possible to understand these expectations.

<sup>15</sup> Last report of the Regulatory Unit of Communication Services (Ursec), available at <http://www.correo.com.uy/documents/20182/24999/Ursec+informe+sector+postal+junio+2017/52d40842-1fc3-4a51-beff-3d88abb1aba4>

<sup>16</sup> *El País*, May 25, 2017



## 2. Analysis of the year: national and Ibero-American premiere fiction

**Table 1. Fictions broadcast in 2017**

PREMIERE NATIONAL TITLES – 4	PREMIERE IMPORTED TITLES – 22
<p><b>TV Ciudad – 1 title</b></p> <p>1. <i>El Mundo de los Videos</i> (miniseries)</p> <p><b>Televisión Nacional del Uruguay – 3 titles</b></p> <p>2. <i>Paleodetectives: la Evolución en Uruguay</i> (series)</p> <p>3. <i>Billy the Krill</i> (series)</p> <p>4. <i>Caidos en Cámara</i> (series)</p> <p><b>CO-PRODUCTIONS – 2</b></p> <p><b>Montecarlo – 1 title</b></p> <p>5. <i>Loco Por Vos</i> (Argentina and United States)</p> <p><b>Teledoce – 1 title</b></p> <p>6. <i>Divina, está en tu Corazón</i> (Argentina, Mexico)</p>	<p><b>Montecarlo – 4 titles</b></p> <p>7. <i>Por Amarte Así</i> (telenovela – Argentina)</p> <p>8. <i>Golpe al Corazón</i> (telenovela – Argentina)</p> <p>9. <i>El Comandante</i> (telenovela – Colombia)</p> <p>10. <i>El Chiringuito de Pepe</i> (series – Spain)</p> <p><b>Teledoce – 13 titles</b></p> <p>11. <i>Las Estrellas</i> (telenovela – Argentina)</p> <p>12. <i>Los Ricos no Piden Permiso</i> (telenovela – Argentina)</p> <p>13. <i>Silencios de Familia</i> (series – Argentina)</p> <p>14. <i>El Maestro</i> (miniseries – Argentina)</p> <p>15. <i>La Fragilidad de los Cuerpos</i> (miniseries – Argentina)</p> <p>16. <i>A través del Tiempo</i> (telenovela – Brazil)</p> <p>17. <i>Por Siempre</i> (telenovela – Brazil)</p> <p>18. <i>Reglas del Juego</i> (telenovela – Brazil)</p> <p>19. <i>Totalmente Diva</i> (telenovela – Brazil)</p> <p>20. <i>Verdades Secretas</i> (telenovela – Brazil)</p> <p>21. <i>Amanda</i> (telenovela – Chile)</p> <p>22. <i>Perdona Nuestros Pecados</i> (telenovela – Chile)</p> <p>23. <i>Velvet</i> (series – Spain)</p> <p><b>Saeta – 2 titles</b></p> <p>24. <i>Moisés y los Diez Mandamentos</i> (telenovela – Brazil)</p> <p>25. <i>Josué y La Tierra Prometida</i> (telenovela – Brazil)</p> <p><b>Televisión Nacional – 3 titles</b></p> <p>26. <i>Cuéntame 17</i> (series – Spain)</p> <p>27. <i>El Ministerio del Tiempo</i> (series – Spain)</p> <p>28. <i>Si Solo Si</i> (miniseries – Argentina)</p> <p><b>RERUNS – 3</b></p> <p><b>Saeta – 1 title</b></p> <p>29. <i>Celia</i> (telenovela – Colombia)</p> <p><b>Televisión Nacional – 2 titles</b></p> <p>30. <i>Hermanos</i> (series – Spain)</p>

	31. <i>Amar en Tiempos Revueltos</i> (telenovela – Spain)  <b>TOTAL PREMIERE TITLES: 28</b> <b>TOTAL RERUN TITLES: 3</b> <b>TOTAL TITLES BROADCAST: 31</b>
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Source: Obitel Uruguay

The offer of Ibero-American fiction premieres experienced a significant decrease in 2017: there were 28 titles, in contrast with the 40 titles of 2016, the 41 of 2015 (in full invasion of the Turkish telenovelas), the 37 of 2014, and, back in 2012, the premiere titles were 47. This fall in the Ibero-American offer is explained by a process of change in the programming decisions of the channels, mainly the private ones. On the one hand, the invasion of the Turkish telenovelas intensifies, increasing the number of titles of that origin: there were six in 2015, when they burst in Uruguay, nine in 2016, and 11 in 2017. But the most significant thing was that, of the three private channels, Teledoce – which was the only commercial channel that did not include Turkish productions – premiered *Med Cezir* in the schedule that traditionally was assigned to Brazilian telenovelas.

Despite this, Teledoce was the channel that had the largest number of Ibero-American premiere fiction titles in 2017, with 13 titles, the same number as the previous year. There was a significant reduction in its offer of Brazilian production: in 2017 it offered only five titles, while in 2016 there were eight, and in 2015, 11. It has been the lowest number of titles of that origin in the last six years and the trend seems to be confirmed at the beginning of 2018, when only one Brazilian telenovela was announced at the launch of the year's programming schedule. This was a significant change because the channel was identified for decades as the display screen of Globo's main titles.

The decrease in the offer of Ibero-American fiction took place mainly in Monte Carlo and Saeta: in 2016 the first one offered 13 titles, while in 2017 it offered only six. The sharpest descent was

that of Saeta, which recorded four in 2016 and only two in 2017. TNU also issued less Ibero-American fiction titles: seven in total.

Another relevant programming decision was to occupy many hours with entertainment programs, especially contests (imported and national ones). The channels focused on the production of entertainment programs based on the purchase of TV formats: *Master Chef* and *Master Class*, aired by Saeta and Teledoce respectively, were the novelties of 2017. It was appealed to the traditional idea of the program for the family, a strategy that seemed to have given good results, especially in the first case. It also recreated the dynamics of broadcasted television, which seemed to be lost.

Regarding the origin of the fictions, Table 2 shows the absence of titles from Mexico and the permanence of Chile as a provider. Despite the historical trend of Argentina and Brazil as major providers with similar weight is maintained, Brazilian fictions occupy 46.3% of screen time.

**Table 2. Premiere fiction in 2017: countries of origin**

Country	Ti- tles	%	Chapters/ episodes	%	Hours	%
<b>NATIONAL (total)</b>	<b>4</b>	<b>14.3</b>	<b>28</b>	<b>2.4</b>	<b>11:23:18</b>	<b>1.4</b>
<b>OBITEL COUNTRIES (total)</b>	<b>24</b>	<b>85.7</b>	<b>1115</b>	<b>97.6</b>	<b>775:46:50</b>	<b>98.6</b>
Argentina	8	28.6	257	22.5	202:45:00	25.8
Brazil	7	25.0	580	50.7	364:14:15	46.3
Chile	2	7.1	130	11.4	72:41:15	9.2
Colombia	1	3.6	47	4.1	36:17:15	4.6
Ecuador	0	0.0	0	0.0	0:00:00	0.0
Spain	4	14.3	60	5.2	65:12:20	8.3
USA (Hispanic production)	0	0.0	0	0.0	0:00:00	0.0
Mexico	0	0.0	0	0.0	0:00:00	0.0
Peru	0	0.0	0	0.0	0:00:00	0.0
Portugal	0	0.0	0	0.0	0:00:00	0.0
Uruguay	4	14.3	28	1.4	11:23:18	1.4
Venezuela	0	0.0	0	0.0	0:00:00	0.0
<b>CO-PRODUCTIONS (total)</b>	<b>2</b>	<b>0.0</b>	<b>41</b>	<b>0.0</b>	<b>34:36:45</b>	<b>0.0</b>
Uruguayan co-productions	0	0.0	0	0.0	0:00:00	0.0
Co-productions between Obitel countries	2	0.0	41	0.0	34:36:45	0.0
<b>GENERAL TOTAL</b>	<b>28</b>	<b>100.0</b>	<b>1143</b>	<b>0.0</b>	<b>787:10:08</b>	<b>100.0</b>

Source: Obitel Uruguay based on Kantar Ibope data

Table 3. Chapters/episodes and hours broadcast by time slot

Time slot	National				Ibero-American				Total			
	C/E	%	H	%	C/E	%	H	%	C/E	%	H	%
Morning (6:00-12:00)	4	14.3	0:23:54	3.5	0	0.0	0:00:00	0.0	4	0.3	0:00:00	0%
Afternoon (12:00-19:00)	6	21.4	2:34:16	22.6	332	29.8	222:20:15	28.7	338	29.6	224:54:31	29%
Prime time (19:00-22:00)	0	0.0	0:00:00	0.0	207	18.6	175:11:15	22.6	207	18.1	175:11:15	22%
Night (22:00-6:00)	18	64.3	8:25:08	73.9	576	51.7	378:15:20	48.8	594	52.0	386:40:28	49%
Total	28	100.0	11:23:18	100.0	1115	100.0	775:46:50	100.0	1143	100.0	787:10:08	100%

Source: Orbitel Uruguay from Kantar Ibope for Ibero-American titles and Equipos Mori for the national ones

Table 4. Formats of national and Ibero-American fiction

Format	National					Ibero-American				
	Titles	%	C/E	%	H	%	Titles	%	C/E	%
Telenovela	0	0.0	0	0.0	0:00:00	0.0	14	58.3	930	83.4
Series	3	75.0	23	82.1	8:48:49	77.4	7	29.2	147	13.2
Miniseries	1	25.0	5	17.9	2:34:29	22.6	3	12.5	38	3.4
Telefilm	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0
Unitary	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0
Docudrama	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0
Others	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0
Total	4	100.0	28	100.0	11:23:18	100.0	24	100.0	1115	100.0

Source: Orbitel Uruguay from Kantar Ibope data for Ibero-American titles and Equipos Mori for the national ones

Table 5. Formats of national fiction by time slot

Format	Morn- ing	%	Af- ter- noon	%	Prime time	%	Night	%	To- tal	%
Telenovela	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Series	1	100.0	1	100.0		0.0	1	50.0	3	75.0
Miniseries	0	0.0	0	0.0	0	0.0	1	50.0	1	25.0
Telefilm	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Unitary	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Docudrama	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Others	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Total	1	100.0	1	100.0	0	0.0	2	100.0	4	100.0

Source: Obitel Uruguay

Table 6. Time period of Ibero-American fiction

Time period	Titles	%
Present	19	67.9
Period	4	14.3
Historical	5	17.9
Other	0	0.0
Total	28	100.0

Source: Obitel Uruguay

Table 7. The ten most watched titles

Title		Coun- try of original idea or script	Channel	Format/ genre	N. of chap./ ep. (2017)	Time slot	Rating	Share
1	<i>Verdades Secre- tas</i>	Brazil	Teledoce	Telenovela	33	Night	13.8	22.7
2	<i>Moisés y los Diez Man- damientos</i>	Brazil	Saeta	Telenovela	109	Night	13.7	27.5
3	<i>Amanda</i>	Chile	Teledoce	Telenovela	122	Night	13.7	20.1
4	<i>Reglas del Juego</i>	Brazil	Teledoce	Telenovela	84	Night	13.5	20.3
5	<i>Las Estrellas</i>	Argen- tina	Teledoce	Telenovela	93	Prime time	13.4	19.4
6	<i>Josué y la Tierra Pro- metida</i>	Brazil	Saeta	Telenovela	119	Night	12.4	22.4
7	<i>Perdona Nuestros Pe- cados</i>	Chile	Teledoce	Telenovela	8	Night	12.0	19.3

8	<i>El Maestro</i>	Argentina	Teledoce	Miniseries	11	Night	10.7	16.8
9	<i>Velvet</i>	Spain	Teledoce	Series	12	Night	9.3	19.4
10	<i>Los Ricos no Piden Permiso</i>	Argentina	Teledoce	Telenovela	30	Prime time	8.8	16.6
<b>Total productions: 10</b>				<b>Foreign scripts: 10</b>				
100%				100%				

Source: Obitel Uruguay from Kantar Ibope data

The top ten of 2017 presented some news regarding the previous years. One of them is that it has two Chilean titles and a Spanish one. The decline of Ibero-American fiction on national screens and the reduction of Brazilian titles were also manifested in the definition of the ten most viewed titles. There were four Brazilian fictions, although we must point out that *Totalmente Diva*, which does not enter the top ten, reached an average of 8.3 rating points and is left out because the number of episodes aired lowers the average rating in relation to the two last titles of the top ten.

For the second consecutive year, Saeta breaks the hegemony of Teledoce in the top ten. The two Brazilian fictions based on biblical characters and events occupied the second and sixth positions, with values around 13 rating points. For a country that is considered as secular and with certain hegemony of antireligious discourses, it is curious that these themes have captured the highest percentages of audience. The presence of Saeta in the top ten must be understood in the context of the changes of the fiction programming strategy: it stopped producing and started importing, especially Turkish telenovelas. It exhibited six Turkish titles with audience values superior to those of the top ten; *Quién se Robó mi Vida* had 17.1 of rating and 27.3 of share; *Amor Prohibido*, 14.9 and 26.4; *Flores de Cristal*, 14.5 and 22.6; the lowest was *Amor Eterno*, but even though it reached 11.3.

**Table 7a. The ten most watched national titles**

Title	Country of original idea or script	Channel	Format/genre	N. of chap./ep. (2017)	Time slot	Rating	Share
<i>El Mundo de los Videos</i>	Uruguay	TV Ciudad	Miniseries/mockumentary	5	Night	n/d	n/d
<i>Paleodetectives 2</i>	Uruguay	TNU	Series/educational	6	Afternoon	0.4	n/d
<i>Billy the Krill</i>	Uruguay	TNU	Animated series/educational	4	Morning	n/d	n/d
<i>Caídos en Cámara</i>	Uruguay	TNU	Series/humor	13	Night	n/d	n/d
<b>Total productions: 4</b>			<b>Foreign scripts: 0</b>				
100%			0%				

Source: Obitel Uruguay and Equipos Mori

The trend that began in 2014 continued: national television fictions issued in 2017 were produced with public funds and broadcast by public television. Two of these productions were educational, *Billy the Krill* and *Paleodetectives*. The first was an animated fiction produced by Coyote, which obtained funds in a contest of the year 2013 called by the National Telecommunications Directorate (Dinatel) and later from two more funds from the Municipality of Montevideo. It was issued by TNU in the grid space “El Canal de los Niños”. This type of issue did not make it possible to identify its rating evolution. It tells the adventures of Billy, a small crustacean in Antarctica, combining adventure with the approach of diverse subjects.

The second season of *Paleodetectives: la Evolución del Uruguay* consisted of six chapters. As indicated by the subtitle incorporated in this edition, it focuses on the theory of evolution and on the evidence and data collected by Charles Darwin in Uruguay. As in the first season (2015), the fictional framework in which resources were inserted was maintained.

Another production is *Caídos en Cámara*, a winning project of a contest summoned by TNU, consisting of 13 episodes in which there are sketches with humorous pretensions. Finally, *El Mundo*

de los Videos, to which we will return in sections 3 and 4 of this chapter.

**Table 8. Audience profile of the ten most watched Ibero-American titles: gender, age, socioeconomic status**

	Titles	Channel	Gender %		Socioeconomic status %				
			Wom-en	Men	A+A-	M+	M	M-	B+B-
1	<i>Verdades Secretas</i>	Teledoce	72.4	27.7	26.3	23.8	19.1	13.06	17.68
2	<i>Moisés y los Diez Mandamientos</i>	Saeta	68.2	31.8	17.6	19.7	25.4	19.28	17.99
3	<i>Amanda</i>	Teledoce	64.6	35.5	16.2	22.1	26.7	16.68	18.3
4	<i>Reglas del Juego</i>	Teledoce	65.5	34.5	21.3	25.4	21.5	13.08	18.73
5	<i>Las Estrellas</i>	Teledoce	63.8	36.2	18.1	18.7	23.7	20.24	19.26
6	<i>Josué y la Tierra Prometida</i>	Saeta	67.8	32.2	13.7	16.6	19.9	19.67	30.15
7	<i>Perdona Nuestros Pecados</i>	Teledoce	66.6	33.4	17.7	19.4	27.2	16.94	18.88
8	<i>El Maestro</i>	Teledoce	66.0	34.1	19.3	22.7	21.4	15.36	21.23
9	<i>Velvet</i>	Teledoce	78.1	22.0	27.2	25.5	18.4	10.88	18.02
10	<i>Los Ricos no Piden Permiso</i>	Teledoce	69.7	30.3	23.8	22.9	16.5	19.75	17.13

	Titles	Channel	Age range %						
			4-11	12-17	18-24	25-34	35-49	50-59	60+
1	<i>Verdades Secretas</i>	Teledoce	3.6	3.1	10.8	8.9	19.1	12.8	41.76
2	<i>Moisés y los Diez Mandamientos</i>	Saeta	4.4	2.0	4.0	5.2	16.0	20.6	47.87
3	<i>Amanda</i>	Teledoce	5.5	3.6	7.6	14.7	23.3	13.3	31.91
4	<i>Reglas del Juego</i>	Teledoce	4.3	4.1	7.5	8.9	21.2	15.5	38.44
5	<i>Las Estrellas</i>	Teledoce	6.2	5.5	9.0	12.6	23.5	15.3	27.92
6	<i>Josué y la Tierra Prometida</i>	Saeta	7.4	3.0	3.0	6.9	15.3	14.2	50.16
7	<i>Perdona Nuestros Pecados</i>	Teledoce	3.6	3.6	5.5	12.8	27.9	10.6	36.11
8	<i>El Maestro</i>	Teledoce	5.3	3.7	11.3	11.3	26.5	10.9	31.03
9	<i>Velvet</i>	Teledoce	2.2	2.0	12.0	7.4	16.1	6.0	54.42
10	<i>Los Ricos no Piden Permiso</i>	Teledoce	4.1	4.0	7.5	8.1	17.9	16.0	42.45

Source: Obitel Uruguay based on Kantar Ibope data

The profile data of the audience in these two tables confirm continuities, but they also show some changes. The audience of the



top ten was still mostly female: between 78% and 63% of the audience are women, while men do not exceed 36.2%. The age range of more than 60 years continues to concentrate the highest percentages, as well as the range between 35 and 49 years, while younger audiences maintain low presence.

Changes were recorded in the composition of the socioeconomic status. It was observed that the percentage increased in the M+ and M sectors, decreased in the M- level, and rose again in the low levels B+B-. The highest percentages were concentrated in the high middle and middle levels for all titles, except for *Las Estrellas* and *Josué*. This showed a substantial change compared to the previous years, in which the audience was composed mainly of B+B-: in 2016 the percentage of this sector was around 30% and was always much higher than that of the M+ and M. The data for 2017 seemed to show a decreasing trend in the audience in the middle and lower sectors. Only *Josué* shows a similar percentage to that of previous years in B+B-.

### 3. Transmedia reception

The analysis of transmedia reception in this chapter focused on the official fan page on Facebook of *El Mundo de los Videos* and the official YouTube channel of TV Ciudad. The data for the analysis of the fan page were collected from the statistics provided by Facebook in the period from September 25 to November 19, 2017. Based on the calculation formula that measures the average level of engagement of a fan page<sup>17</sup>, as well as the average *engagement* of each individual post<sup>18</sup>, following actions such as “likes”, sharing and

<sup>17</sup> The average engagement level of a fan page measures the average of interactions between a fan page and its community of fans, following actions such as likes, shares and comments from the calculation expressed in the following formula: number of interactions in the period (comments + likes + share) / total number of posts in the period / total number of fans at the end of the period = result × 100. The data used to calculate the formula were extracted from the fan page statistics provided by Facebook in the section: “History of publications” (data collected on January 15, 2018).

<sup>18</sup> The average engagement level per post is used to measure the average interaction level reached by a post in its fan community at the end of a period. Its calculation is expressed

comments, the average reached interaction level of the period was obtained both by the fan page and by the individual posts.

The official fan page reached 2,357 fans, 52 posts, 5,211 likes, 560 shares, 321 comments and an average engagement of 4.97% at the end of the period. The periods<sup>19</sup> that obtained a higher level of interaction were the first week of activity of the fan page (13.82%) and the second week after the premiere, broadcast by TV Ciudad (12.89%).

Among the post with the greatest weekly interaction, the one published on November 13, “¡Llegó el fin del Mundo!”, had the highest average, with an engagement of 37.33%, 790 likes, 36 shares and 54 comments. These interactions were between the fan page administrator and fans based on specific queries and their responses. In the few interactions between participants, they involved people who seemed to know each other, what is inferred from the “closed” topics of the conversations.

The data of interaction on YouTube during the period from October 16 to November 13, 2017 revealed that the first chapter was the one that obtained the most views<sup>20</sup> and comments of all episodes of the series. These comments showed differences in comparison with the official fan page. On YouTube, there was greater interaction among the participants, as well as a tendency to develop more extensive statements. The element that caused this to happen was the dissent regarding the acting quality, the characters, the script, the slow timing of the dialogues and actions. But it was the subject of Uruguayan fiction itself that especially unleashed the confrontation between the participants. The conversation resulted in taking positions in front of a certain Uruguayan identity or idiosyncrasy identi-

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by the formula: number of interactions of the post (comments + likes + share) / total number of fans in the period = result  $\times$  100.

<sup>19</sup> The time frame (from September 25 to November 19, 2017) that delimited the data collection was defined under a weekly period criterion in order to have a common base of the total number of fans at the end of each week, a necessary element to calculate engagement rates.

<sup>20</sup> Based on YouTube data from February 20, 2018.

fied in the series and in other titles of the national cinema – with references to *Whiskey* and *25 Watts* – based on certain attributes.

#### 4. Highlights of the year

##### *Dominant and social themes of Ibero-American fiction*

The traditional narrative topics that go through the top ten fictions are: the love triangle, the hidden identity and its revelation, the forbidden love relationships, transgressors of moral and social rules (*Verdades Secretas*, *Perdona Nuestros Pecados*), and revenge from a secret fact of the past. With a narrative insertion sometimes more careful than others, the social themes present in the agenda of the public discussion were linked to these topics. Sexual abuse is treated in at least two fictions. One of them is *Verdades Secretas*, where the foray into the modeling of the central character, a young adolescent, places her in a luxury prostitution circuit and then in a loving relationship with an adult who, in addition, marries her mother. The other one is Chilean telenovela *Amanda*, in which the violation of the main character – in the past – is the engine of the whole plot in which Amanda will face new situations of violence. Violence and abuse against women is common here.

The patterns of business and political corruption are addressed in *Reglas del Juego*. Thus, the protagonist – presented as a defender of human rights and leader of a NGO – is truly a key element of a criminal organization. Finally, the theme of addictions, quite recurrent in recent decades, is addressed with a different degree of intensity mainly in *Verdades Secretas* and *El Maestro*.

From the point of view of the modalities adopted by the protagonists in the ten most viewed titles, it is possible to observe: one focused on the character (*Reglas del Juego*, *El Maestro* or *Amanda*) always in relation to the configuration of the loving couple; another coral, such as *Las Estrellas*, *Velvet* or *Los Ricos no Piden Permiso*.

### *National fiction*

The broadcast of *El Mundo de los Videos* is highlighted in 2017, after several years of work and after overcoming difficulties in order to be aired<sup>21</sup>, by Tevé Ciudad. The narrative mode is that of the mockumentary as in the previous miniseries of these same filmmakers<sup>22</sup>: the characters speak to the camera, and in some moments they address the people filming behind them; other times they do not speak, they only look at the camera as if confirming their presence, uncomfortable for it. The slight unstable movement of the camera and its movement from one face to another are other characteristics of the genre.

The characters develop in a scheme of choral protagonism, consisting of four characters. They are antiheroes, anonymous, marginal human beings, and there is nothing particularly great in them. Even those who have some share of evil (like Willy, the owner of the video store) do not go beyond a petty meanness. Each of the characters has a specific narrative arc that develops within a central plot axis: the future of the video club and the efforts for survival. The seriality of the narrative is characterized by the continuity of these narrative threads.

The black or acid humor goes through the situations in which the characters find themselves and there are moments in which the humor does not quite fit into those qualifications: it is an uncomfortable mood, which does not depend on a shot, but rather arises from the contemplation of a situation that is not going anywhere, which is

<sup>21</sup> The series obtained the support of three competitive public funds: the Fund for the Promotion and Development of the National Audiovisual Production in 2014 (Fona), Montevideo Filma and Montevideo Audiovisual Partner, through which it reached an amount close to 200 thousand dollars to allocate the production of five chapters. Once it was made, it was difficult to get an exhibition screen, and finally it was released in October 2017 on TV Ciudad and on its YouTube channel.

<sup>22</sup> *REC. Una serie casera*, released in 2012 by TNU. Miniseries of nine chapters of 25 minutes. Written and directed by Matías Ganz and Rodrigo Lappado. Cast: César Troncoso, María Elena Pérez, Agustín Pérez, Sol Regules, Mateo Altezo and Alan Ortiz star in the series as parents, brothers and friends of Sebastián, who is represented by Luis Sanguinetti. In the credits, Carlos Tanco's scriptwriting advice is made explicit. Co-production of Negro Jefe and Buen Cine.

between absurd and ridiculous. The daily life of the video club and its characters is covered in a slow rhythm, for moments exasperating, as well as the unfortunate lives of the characters.

One of the characteristics of the series is its intertextuality with *25 Watts* (2001), a movie that marked a milestone in the national cinema: the video club scene and the reference to porn videos recall the scenes and situations of the video club in the film; The character of Ricardo, who listens to voices in his mind, evokes the character of the “blandengue” in *25 Watts*, played by the same actor in both cases. These are some of the connections that could be read as quotes.

## **5. Theme of the year: TV fiction on video on demand platforms**

According to *TV and Media 2017* report<sup>23</sup>, 42% of television consumption in 2017 corresponds to on demand content. This report projections for 2020 indicate that only one in ten users will watch television on a traditional screen and seven out of ten will prefer on demand to linear television.

The characteristics of the expansion and accessibility to the internet in Uruguay make global trends also become evident in the country (see section 1.6 of this chapter). For some actors, this is seen as an opportunity, and for others, it means transforming themselves into vehicles for circulating contents, especially foreign ones, and reproducing the general tendencies of the production flow. That is, they place in their offer the products that have a minimum risk and warranted success according to their performance in other countries.

The most relevant antecedent of non-linear television in Uruguay is Vera TV: streaming platform linked to the state-owned telephone service (Antel) through which it is possible to access the live broadcast of several national and international channels and on demand content, in addition to surveillance cameras on public roads. At the moment it does not include the private channels of open tele-

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<sup>23</sup> The study was carried out on 13 countries <https://www.ericsson.com/en/trends-and-insights/consumerlab/consumer-insights/reports/tv-and-media-2017>

vision of Montevideo, something that did happen in previous years. The national live channels are TNU, TV Ciudad (public channels), digital channels Pop TV, Channel M, El Observador, RTV, 1000 x Hora (cable channel) and more than 30 channels from the rest of the country. Only one Uruguayan fiction was recorded: the first season of *Los Misterios de Rolo y sus Amigos*. In addition, VeoFlix platform is associated with Vera, exclusively for feature films, series and filmed theater. It works as Netflix. For now, there is no Uruguayan content.

In Uruguay VoD services corresponding to catch-up TV have widespread as well as hybrids in which it is combined with rental systems. All pay TV companies that perform in the country offer live streaming services or VoD, which are usually included in the fee, although in some cases it depends on the package that has been hired if an additional amount is charged or not. Each company presents some variant, especially in the supply of national products.

DirecTV, DirecTV Play and Cable Visión do not include Uruguayan content in their VoD offer. The three pay TV companies (Nuevo Siglo, Montecable and TCC) that are linked to open TV channels and groups of traditional media owners in Uruguay have their own live air channels, and the national offer in VoD consists mostly of information programs, reports, entertainment, but in none of the cases there is national fiction. Saeta is known for having on demand Turkish soapoperas but does not offer any of the seven titles of Uruguayan fiction that produced or co-produced between 2009 and 2012. The same happens with the Uruguayan fictions linked to Monte Carlo or Teledoce: none of the aforementioned companies includes them in its VoD catalog.

Netflix is the specific on demand content platform that has had a growing expansion in Uruguay. Since 2017, HBO Go is also available. Except for the sporadic appearance of some movies on Netflix and the case of *El Hipnotizador* on HBO, there is no Uruguayan presence.

### ***Where is Uruguayan fiction in this context?***

In addition to *El Mundo de los Videos*, other fictions of open channels are available on YouTube: *Adicciones* (Teledoce, 2011), *Piso 8* (Saeta, 2007), *Uruguayos Campeones* (Montecarlo TV, 2004), but it was not the channels, but rather the people that uploaded them to the platform.

Above all, webseries use YouTube as a platform, where one can find *Polifaceta* (2016). Also, Finoli Finoli production company offers a variety of content in its account, although some are no longer available because they were transferred to ClickVeo! platform, which we will discuss later. One of Finoli Finoli's latest webseries, *El Maravilloso Parque Hoolister* (February, 2018), is available on Argentinian YouTube channel UN3TV.

### ***Netflix paradigm: the case of ClickVeo!***

ClickVeo! is a streaming platform that corresponds to the subscription video on demand (SVoD)<sup>24</sup> category. It was created as a kind of Netflix with strictly Uruguayan audiovisual content. Its creators, Fabián Curzio, television producer, and Diego Soto, content director<sup>25</sup>, wanted to create a web channel that would bring together the national production of different genres and that, in the future, could be able to produce its own contents.<sup>26</sup>

It has more than 3 thousand titles available, of which 10% correspond to fiction, according to Diego Soto.<sup>27</sup> The offer is organized in movies, series, carnival, music, archive, TV shows, short films, documentaries, photos, stand up and radio.<sup>28</sup> The archive section in-

<sup>24</sup> It was launched on November 23, 2017. It was declared of cultural interest by the Ministry of Education and Culture, of ministerial interest by the Ministry of Foreign Affairs, and country brand by the Ministry of Tourism.

<sup>25</sup> Both work for Saeta. Soto was linked to the fiction production of the channel, specifically to *Porque te Quiero Así*, *Bienes Gananciales* and *Somos*.

<sup>26</sup> *El País*, December 2, 2017. Available at <https://www.elpais.com.uy/sabado-show/clickveo-archivo-cultural-uruguayo-plataforma-digital.html>

<sup>27</sup> Interview to Diego Soto, conducted by Lucía Gadea, March 2018.

<sup>28</sup> Within the radio category, you can access to Eduardo D'Angelo's radio file, a prominent actor and Uruguayan humorist who died in 2014, but there are plans for expansion.

cludes old Uruguayan humor programs, such as *Decalegrón*, *Hiperhumor*, *Gastos Comunes* and *El Hombre del Doblaje*. ClickVeo! also added: Finoli Finoli's webseries catalog, such as *Escuela de Canotaje* or *Habitación*, series produced by Ping Pong Pictures; TV fictions *Porque te Quiero Así* and *Somos*, ceded by Saeta; and short films from Escuela de Cine del Uruguay and Dodecá School.<sup>29</sup> The catalog covers 20 series, 40 films and about 200 short films.

It was developed in alliance with Antel, which provided the technical infrastructure and made the business viable. This service has a cost of \$ 180 per month within Uruguayan territory and US\$ 7 from abroad, through PayPal.<sup>30</sup> Four months after its creation, it had 2 thousand subscribers.<sup>31</sup>

The business model is sustained thanks to an agreement with the content owners: each one receives a percentage of what the subscriber pays.<sup>32</sup> The projections for the venture is to invest the profits in the production of exclusive content, following Netflix<sup>33</sup> model, but until now they offer contents already produced and, regarding TV fiction, their contents are basically Saeta's productions or web-series.

### ***The series and the VoD***

The possibilities of streaming and the platforms offered by VoD have produced two interconnected phenomena: on the part of the broadcasters, the intense demand for content (services such as Netflix or HBO Go are content-devouring machines like television has never had); on the consumers' side, the permanent search for new

<sup>29</sup> Article on *Grupo Isos*, November 30, 2017. Available at <https://www.grupoisos.com/leer/clickveo-una-plataforma-con-el-contenido-audiovisual-uruguayo-como-eje>

<sup>30</sup> Article on *El País*, December 22, 2017. Available at <https://www.elpais.com.uy/sabado-show/clickveo-archivo-cultural-uruguayo-plataforma-digital.html>

<sup>31</sup> Interview conducted by Lucía Gadea.

<sup>32</sup> Article on *Portal Ecos*, November 23, 2017. Available at [http://ecos.la/AR/8/ciencia\\_tecnologia/2017/11/23/19052/clickveo-plataforma-streaming-con-3000-contenidos-nacionales/](http://ecos.la/AR/8/ciencia_tecnologia/2017/11/23/19052/clickveo-plataforma-streaming-con-3000-contenidos-nacionales/)

<sup>33</sup> Article on *La Diaria*, December 2, 2017. Available at <https://ladiaria.com.uy/articulo/2017/12/entre-netflix-y-archivo-total-de-lo-uruguayo/>



content and, in particular, valuing original titles. The consumers experience a rather paradoxical situation: they probably have never faced such abundance, but at the same time the fragmentation of the offer makes searching and choosing what to see a problem.

The permanent demand for new contents and the new logic of nonlinear television can constitute an opportunity for fiction production in Uruguay. On the one hand, it would allow the overcoming of the limitations of the local market; and, on the other, it would not demand long-term fiction productions, which are difficult to sustain for national productions. In a retrospective it will be seen that Uruguayan fictions since 2009 have been mostly composed of 13 chapters and in the last four years they have not exceeded nine chapters.

Despite these demand conditions for content, the creation of VoD television fictions in Uruguay is incipient. We identified two trends present in the Uruguayan scenario: 1) the fiction that was intended for open television, produced with public funds, but also offered on demand on YouTube, such is the case of *El Mundo de los Videos*; 2) television fiction produced directly thinking of its display on a VoD platform, such is the case of *El Hipnotizador*. While in the first there is no business model, but a dependence on public funds and public screens, in the second one there is a business model that aims at internationalization.

HBO Latino series *El Hipnotizador*<sup>34</sup>, which so far has two seasons, each one with eight episodes of one hour, was the result of the partnership between RT Features, a Brazilian production company, and Uruguayan Oriental Features<sup>35</sup>, with participation of resources from Argentina, Brazil and Uruguay. In addition, the series is spoken in Spanish and Portuguese. The filming was in Uruguayan locations (Montevideo and Fray Bentos, among others), with a produc-

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<sup>34</sup> It is based on a comic written by Pablo de Santis and drawn by Juan Sáenz Valiente, published on magazine *Fierro* in 2007. The first season is more linked to the comic than the second one.

<sup>35</sup> It should be noted that this is not the only project of this association and that Oriental Features has developed and continues to participate in many film projects.

tion team that was mostly conformed by Uruguayan technicians. Oriental Features provided production services and participated in the artistic decisions. In the second season, the presence of Arauco Hernández in photography, César Troncoso, Daniel Hendler, Mirella Pacual, Camila Vives and Florencia Colucci in the cast are some of the names that give an account of Uruguayan participation.

Santiago López, executive producer of Oriental Features, has a perspective that is interesting here because Oriental brings together the experience of having worked for open television<sup>36</sup> productions at the same time that has searched for a business model with international alliances that would allow growth and development. He analyzes the difficulties of the Uruguayan market in which he notices two fundamental obstacles: the absence of effective state promotional actions and the lack of involvement of the rest of the private actors, open television channels, cable companies and platform owners. These are the actors, López points out, “that should create the market and that should risk with the producers, but they are totally absent”<sup>37</sup>. López says that the production conditions will be favorable if the action of these actors is combined:

with a boost from the State, so that there is a business ecosystem, which turns viable the development of the activity as an industrial activity. And with the participation of today’s absentees, understanding that the business model in fiction is possible by betting on quality productions with less risk using co-production strategies and seeking to be holders of the rights. Today, the key to the business passes through the ownership of rights. [...] I insist: until the channels, the cables and those with platforms do not participate in the business, this will be very difficult for everyone. Uruguay has the

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<sup>36</sup> *Historias de Diván*, an Argentinian-Uruguayan co-production broadcast by Saeta, was one of them.

<sup>37</sup> Interview conducted by Lucía Gadea, March 2018.

capacity and the talent to produce two or three projects like this one per year for the local and international market with the quality levels that this market demands. But that missing pillar is essential.<sup>38</sup>

Beyond this diagnosis, Oriental Features continues with the realization of television and film projects.<sup>39</sup> It develops a line of action combining the regional and international context in a way that maintains a system of continuous production. One of its next objectives is to make a fully Uruguayan series with standards that allow it to enter the international on demand platforms.

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<sup>38</sup> Idem.

<sup>39</sup> At the closing of this chapter, he is filming Miguel Falabella's film *Veneza* and beginning to shoot another feature film, now an Uruguayan one, *El Cambista*.

## VENEZUELA: RUPTURE IN DEMOCRACY, RESISTANCE OF FICTION

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### 1. Venezuela's audiovisual context in 2017

During 2017 the constitutional fabric was ruptured in Venezuela. Sentences by the The Supreme Court of Justice ignored the the National Assembly (the Legislative Power), which had been elected democratically. By mandate of the President of the Republic, Nicolás Maduro, and transgressing what is established in the National Constitution (1999), a parallel structure was established, usurping the functions of the National Assembly, the National Constituent Assembly (NCA), with full powers to interfere in any sociopolitical aspect of the country. The NCA is made up in its entirety of members of the official Partido Socialista Unido de Venezuela (PSUV, United Socialist Party of Venezuela). An estimated 26,616 people were murdered in violent acts (OVV, 2018). The political crisis and food and medicine shortages caused at least 9,787 protests (OVCS, 2018a). The protests were staged for different reasons (between April and July): transparent elections, acknowledging the National Assembly, the opening of Canal Humanitario, and the release of political prisoners – taking a toll of 163 deaths (OVCS, 2018b). The accumulated inflation closed at 2.616% (Asamblea Nacional, 2018).

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<sup>1</sup> Special thanks to company Nielsen Venezuela, for its selfless collaboration in the development of this research, especially Juan Manuel Martínez (CS Account Executive), for his valuable contribution. This chapter had the invaluable support of Mariángel Alvarado Severino, who worked as research assistant, under the coordination of Dr. Morella Alvarado Miquilena and with the data and information provided by José Luis Poleo.

The migratory process accelerated and it is now known as the “Venezuelan diaspora”. In this context, the telecommunications sector and the production of TV fiction were contracted. In this chapter, we have put emphasis on the resistance of serialized fiction in Venezuela, since, in view of the drastic reduction in own production, the top ten is headed by a national production.

1.1. Open television in Venezuela

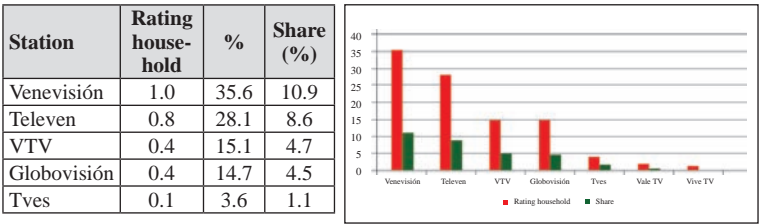
Chart 1. National open television networks/channels in Venezuela

Private networks/channels (7)	Public networks/channels (8)
Canal I	Colombeia – La televisora educativa de Venezuela
Globovisión	Compañía Anónima Venezolana de Televisión – VTV
Meridiano Televisión	ConCiencia TV
Televen	Fundación Televisora Venezolana Social – Tves
TV Familia	Corazón Llanero
Vale TV	La Nueva Televisión del Sur C.A. – Telesur
Venevisión	TV Fanb
	Visión Venezuela – Vive TV
TOTAL NETWORKS = 0    TOTAL CHANNELS = 14	

Source: Data revealed by the research, Obitel Venezuela team 2018

The national television networks did not undergo great changes in 2017. Corazón Llanero joined the list of public channels created and controlled by the Venezuelan State. Although it started broadcasting in August 2016, it was not until May 2017 that it joined the open television channels with programming connected with the folklore of the plains region.

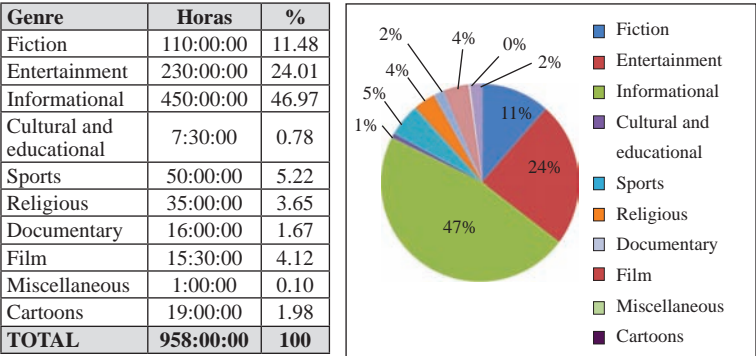
Graph 1. Audience and TV share by station (rating per household)



Vale TV	0.1	1.8	0.6
Vive TV	0.0	1.1	0.3
<b>TOTAL</b>	<b>2.8</b>	<b>100.0</b>	<b>30.7</b>

Source: Nielsen Venezuela 2018

Graph 2. Genres and number of hours aired on TV



Source: Data revealed by the research, Obitel Venezuela team 2018

The data were obtained with a random selection, during a week of programming (April 24-30, 2017), from the following channels: Channel I, ConCiencia TV, Telesur, Televen, Tves and Vive TV.

1.2. Audience trends over the year

According to the data provided by Nielsen, the most popular open TV channels were Venevisión, with 0.99% of rating, and Televen, with 0.78%. As in previous years, the most viewed productions are telenovelas. According to DTV Ratings, between January and May, Globovisión ranked first, a spot that it held for five months. *Vladimir a la 1* stands out as the most viewed program, which is a talk show hosted by Vladimir Villegas and aired by the same channel. The time slot with the widest open signal programming is held by the news, but, when it comes to keeping themselves informed, Venezuelans prefer subscription channels, digital media and social networks.

### 1.3. Advertising investments of the year: in TV and in fiction

The advertising industry, like in 2016, suffered the impact of the crisis the country is undergoing. In this regard, Mariana Farías, president of Ars DDB, considers that, if this tendency continues, the country will experience greater reduction of activities, loss of markets and the total or partial shutdown of companies, both on the part of the advertisers and the agencies and production companies, which are already deeply affected (Siracusa, 2017). Despite this situation, the agencies maintain the hope that the situation will improve. Advertisers reorganized the strategies used to continue being present in the people's memory and concentrate their efforts on plans aimed specifically at their target audience (Cadena, 2017). In Nielsen advertisers ranking, we find that the first spot is occupied by a food and drink company, with 1,761,052,605 BsF of investment; the Bolivarian government is in the second place, with an investment of 1,116,586,949 BsF; in third is another food and drink company, with 479,842,021 BsF worth of investment. This ranking is based on measuring the investment in advertising of the main open TV channels in Venezuela.

### 1.4. Merchandising and social merchandising

With respect to social merchandising, the campaigns launched since 2016 remained. That is how Venevisión kept “Somos lo que Queremos” within its afternoon program *Atómico*, a campaign in which they show cases of people who overcame obstacles and attained their goals thanks to their effort and dedication. In addition, they kept the informative tips “Al Acoso Escolar, Sácalo del Juego”, “Con Violencia no Hay Paraíso” and “El Buen Venezolano” within news show *Noticiero Venevisión*. All the campaigns can be viewed on the channel's web page and on YouTube, where the micros from previous years can be viewed.

In turn, Televen showed programs *La Vida Es Hoy*, *Se Ha Dicho* and *Gente que Motiva*, in which they reflect about life, legal help is provided and moral values are promoted via inspiring stories,

respectively. These could be watched not only on the TV channel but also on YouTube.

### **1.5. Communication policies**

The “Constitutional Act against Hatred, for Peaceful Coexistence and Tolerance” came into effect on November 8, 2017, passed by the National Constituent Assembly. The so-called “Hatred Act” contemplates up to 20 years of imprisonment for those who spread messages promoting hatred, discrimination or violence through the media or the social networks (article 20); it revokes the license of radio or television operators that issue “hatred” contents or “in favor of war”; and it stipulates fines of up to 4% of the gross incomes for the radioelectric media that refuse to spread messages to prevent violence or in favor of tolerance (article 23). This instrument creates a favorable atmosphere for censorship and self-censorship, compounded by the fact that the application of penalties is at the discretion of the government authorities. On the other hand, the text is ambiguous and it does not define clearly what is considered “hatred”.

Adopting this act is in keeping with the policy adopted by the Venezuelan government to silence contents that they deem critical of their administration. In conformity with this, the governmental Comisión Nacional de Telecomunicaciones (Conatel, National Telecommunications Commission), a body belonging to the Ministry of Communication and Information, ordered the subscription television companies to take the signal of international network CNN in Spanish off the air and they blocked access to the channel’s web page from Venezuela, on February 15, 2017 (Conatel, 2017a), after the channel aired a report about an alleged sale of Venezuelan passports and ID cards to foreigners. A few days earlier, on February 12, President Maduro, on a televised address, had said that he wanted CNN out of Venezuela (Diario Panorama, 2017). Conatel also ordered to take off the air ULA TV (of Universidad de Los Andes), Zea TV and Televisora Cultural de Tovar, besides Caracol TV, RCN and El Tiempo Televisión (from Colombia), Todo Noticias (Argen-



tina) and Antena 3 (Spain), which are international channels that broadcast their signals through subscription television (Ipys Venezuela, 2018). Censorship reached TV fiction when Conatel prohibited airing Colombian series *El Comandante*, a biopic based on the life of the late President of Venezuela, Hugo Chávez, produced by Sony Pictures Television.

## 1.6. ICT trends

In view of the lack of transparency and the self-censorship affecting open TV networks, the internet and subscription television became an alternative for the citizens to access the news and entertainment content. Nevertheless, the Venezuelan government started legal actions and administrative measures to control their contents.

The number of internet subscribers had reached 3,593,247 by 2017, with a total of 17,088,335 users and a penetration of 61.95%, according to Conatel records (2017c).<sup>2</sup> Connection speed averaged 1.8 Mbps (Akamai, 2017), showing a 0.1% reduction with respect to the previous year, which prevented access to quality internet services and limited the upload and download of audiovisual contents, as well as access to the services of on demand television. The sector of cellular telephony continued to be in recession. The number of subscribers reached was 27,512,042, of whom 25,829,369 had active lines (1,996,564 fewer active lines than the previous year). According to this indicator, penetration was 82.7% (83 active lines per 100 inhabitants) (Conatel, 2017c). In 2017 a total of 25 channels broadcast their signals using open digital television (ODT) technology, of which 20 are state-run TV stations (four have conventional and mobile signals), three of them are private and two are international channels<sup>3</sup> (TDA Venezuela, 2017). Only three of these chan-

<sup>2</sup> The data correspond to the second trimester of 2017, the last time that Conatel published statistics about the sector.

<sup>3</sup> Public ones: 123 TV, Alba TV, ANTV, SIBCI HD, Ávila TV, Colombeia TV, TV Con-Ciencia, Pdvsá TV, Telesur, Tves, TV Fanb, Venezolana de Televisión (VTV), Vive TV, Corazón Llanero, VTV Móvil, Telesur Móvil, Tves Móvil, Zum TV, Ávila TV Móvil, Barra de Colores; private ones: Venevisión, Televen, Meridiano TV; international ones:

nels (private Venevisión and Televen and state-run Tves) include TV fiction in their regular programming. There are no official data about the number of users that had access to ODT during that year or about the consumption of TV content under the video on demand (VoD) system. It is estimated that access to on demand content is limited, since their price is fixed in dollars and the circulation of foreign currency is restricted in Venezuela, due to the exchange control in effect in the country since 2003. This situation has brought about the emergence of a black market that provides services like that of Netflix, paid for in the local currency (Peña and Rincón, 2017). The basic telephony services, as well as those of cellular telephony, mobile internet and subscription television had rate increases of over 400%, which caused a decline in their consumption. The cost-benefit relation was in reverse because, despite the increases, the turnover of the companies in the sector was not sufficient to cover their infrastructure upkeep expenses or the costs associated with updating the technological platforms, which resulted in insufficient services. The state-run *Compañía Anónima Nacional de Teléfonos de Venezuela* (CANTV) offered lower rates for subscription television, basic telephony and mobile telephony, but these services had also lower quality.

During 2017 the event *Venezuela Digital 2017* was held, promoted by the national government, to share reflections and knowledge about the future of digital communications and the social networks, in the formation of a critical thinking and political and social behavior. This activity held up as their banner the “*Misión Robinson Digital Yo existo, yo puedo, para la batalla en las redes sociales (RRSS) y el mundo 2.0*”<sup>4</sup> (Mission Robinson Digital I exist, I can, for the battle on the social networks and the world 2.0), which had been created in 2016, but was promoted during 2017.

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Rusia Today, China Central Televisión (CCTV) (TDA Venezuela, 2017).

<sup>4</sup> RNV (2017). *Misión Robinson Digital capacitará a más de seis mil facilitadores*. Retrieved on April 10, 2018 from: <http://rnv.gob.ve/mision-robinson-digital-capacitara-a-mas-de-6-mil-facilitadores/>

### 1.7. Public TV

The public media system in Venezuela consists of 12 TV networks, among national, local, international and digital ones, which work as the arms of the official propaganda of the Partido Socialista Unido de Venezuela (PSUV) and they are far from being authentic media at the non-governmental public service. On March 29, 2017 the then Minister of Communication and Information, Ernesto Villegas, announced that a new official TV station would come onto the air: Miraflores TV, whose broadcast would be made on the internet and it would provide the users with the choice of accessing their contents using the modality of on demand television, free of charge (Conatel, 2017d).

It is an a-la-carte TV station based on IP technology, it is not conventional television, but a new way of watching and making television [...]. It is the new paradigm of television that breaks away with the television we had known up to now, we have put ourselves in line with the technological development to provide these tools for the Bolivarian Revolution and the Venezuelan people (Villegas at MinCI, 2017).

A year later the web page via which the channel's contents would be broadcast was not available any more. The propagandistic use of the public sector TV networks was compounded by the reiterated presidential speeches, whose broadcast is obligatory through the network of TV and radio stations of the country, which in 2017 alone amounted to 250 hours, 26 minutes and 58 seconds (Monitoreo Ciudadano, 2018).

### 1.8. Pay TV

Subscription television had a penetration of 63.58 % (64 of every 100 households), which included a total of 4,807,789 subscribers (Conatel, 2017b). It was possible to observe that there was a decline with respect to the year 2016, when it had reached a penetra-

tion of 66.36%. It is estimated that this decline is connected with the economic crisis affecting Venezuela and the censorship measures taken by Conatel, which resulted in the shutdown of some stations, like CNN in Spanish.

### 1.9. Independent production companies

Although the Act on Social Responsibility on the Radio, Television and the Electronic Media provides for the figure of national independent producer and mandates the TV networks that air via the open signals to broadcast a minimum of five hours a day in their programming, this fact has not guaranteed participation and distribution of the programs generated by independent production companies on the screens. In turn, the economic recession that Venezuela is undergoing has caused the country's main TV networks to reduce their internal productions to a minimum, so they have turned to private production companies, imported contents or the rerun of telenovelas from previous years to fill in their fiction quotas.

Channel RCTV and RCTV Producciones, despite the fact that they do not have the radioelectric signal license to broadcast their programming, have not stopped producing contents and they lend their spaces to make different kinds of audiovisual products. During the year 2017, RCTV Producciones produced telenovela *Ellas Aman, Ellos Mienten*, originally by José Vicente Quintana, distributed by RCTV Internacional and aired by Televen. It also produced *Corazón Traicionado*, originally by Martin Hahn, which will be released in 2018. Production company VIP 2000, jointly with Ideas Estudios and Televen, produced series *Prueba de Fe*, which told stories connected with miracles that had happened in real life. Televen also broadcast some episodes of *Escándalos*, a series of unitary produced by VIP 2000 and co-produced by Ideas Estudios and Televen, whose release had been in 2015. The pilot episodes of series *Romeo y Julio*, *El Muro* and *Dorian Grey* were also produced in Venezuela. Although the quality and final make of the product surpassed the results expected in most cases, the projects were not made in the

country due to the conditions of political instability, the severe economic crisis and especially the reigning insecurity. The series were made in other countries and sold at NATPE Miami. Producing with foreign investment in Venezuela is an ideal choice for the audiovisual industry, but today there are no guarantees for the investors.

1.10. International trends

The international projection and expansion of IVC Network is one of the outstanding aspects of 2017. This Venezuelan-US channel that airs via subscription television services managed to fill its programming with telenovelas and series of great international relevance, sports and news shows and entertainment contents, broadcasting in Mexico, Colombia and some other Central American and Caribbean countries. RCTV Producciones and Televen established international alliances to co-produce fictions that are aired and, in some cases, shot in different countries of the continent, such as series *Prueba de Fe*, shot in Venezuela, Panama, the USA and Mexico. Venezuela has become little by little an attractive place to make fictions, under the format of co-production, due to the fact that the imbalance characteristic of the Venezuelan economy allows the investments in foreign currency to obtain high profits when they are exchanged into the local currency.

2. Analysis of the year: national and Ibero-American premiere fiction

Table 1. Fiction broadcast in 2017  
(national and imported; premieres and reruns; co-productions)

<b>PREMIERE NATIONAL TITLES – 4</b>  <b>VENEVISIÓN – 3 national titles</b> 1. <i>Cartas al corazón</i> (unitary and talk show) 2. <i>Para Verte Mejor</i> (telenovela) 3. <i>Sabor a Ti</i> (telenovela)	<b>TVES – 2 imported titles</b> 26. <i>Antes Muerta que Lichita</i> (telenovela – Mexico) 27. <i>Cachito de Cielo</i> (telenovela – Mexico)  <b>CO-PRODUCTIONS – 2</b> <b>TELEVEN – 2 titles</b> 28. <i>Guerra de ídolos</i> (Mexico/USA)
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<b>TVES – 1 national title</b> 4. <i>La Viuda Millonaria</i> (series)	29. <i>Prueba de fe</i> (unitary – Venezuela/Peru/Panamá)
<b>PREMIERE IMPORTED TITLES – 23</b>  <b>VENEVISIÓN – 8 imported titles</b> 5. <i>Corazón que Miente</i> (telenovela – Mexico) 6. <i>El Tesoro</i> (telenovela – Colombia) 7. <i>La Dinastía/Los Morales</i> (series – Colombia) 8. <i>La Suegra</i> (telenovela – Colombia) 9. <i>Mi Marido Tiene Familia</i> (telenovela – Mexico) 10. <i>Tres veces Ana</i> (telenovela – Mexico) 11. <i>Un Camino Hacia el Destino</i> (telenovela – Mexico) 12. <i>Vino el Amor</i> (telenovela – Mexico)	<b>RERUN TITLES – 14</b>  <b>VENEVISIÓN – 3 titles</b> 1. <i>El Chavo</i> (serie – Mexico) 2. <i>Torrente, Torbellino de Pasiones</i> (telenovela – Venezuela) 3. <i>Un Esposo para Estela</i> (telenovela – Venezuela)  <b>TELEVEN – 9 titles</b> 4. <i>Dulce Amargo</i> (telenovela – Venezuela/Mexico/USA) 5. <i>Escándalos</i> (unitarios – Venezuela/Mexico/USA/Panama) 6. <i>El Gato Tuerto</i> (series – Venezuela) 7. <i>Guayoyo Express</i> (series – Venezuela) 8. <i>La Inolvidable</i> (telenovela – Venezuela) 9. <i>La Trepadora</i> (telenovela – Venezuela) 10. <i>Nora</i> (telenovela – Venezuela/Mexico) 11. <i>Rafael Orozco</i> (series – Colombia) 12. <i>Violetta</i> (series – Argentina)
<b>TELEVEN – 13 imported titles</b> 13. <i>Cuando Vivas Conmigo</i> (telenovela – Colombia) 14. <i>La Cacica</i> (telenovela – Colombia) 15. <i>La Doña</i> (telenovela – Mexico) 16. <i>La Fan</i> (telenovela – USA) 17. <i>La Nocturna</i> (telenovela – Colombia) 18. <i>Las Hermanitas Calle</i> (telenovela – Colombia) 19. <i>Pobre Gallo</i> (telenovela – Chile) 20. <i>Polvo Carnavalero</i> (telenovela – Colombia) 21. <i>Silvana Sin Lana</i> (telenovela – USA) 22. <i>Sinú, Río de Pasiones</i> (telenovela – Colombia) 23. <i>Soy Luna</i> (series – Argentina) 24. <i>Tierra de Reyes</i> (telenovela – USA) 25. <i>Tu Voz Estéreo</i> (series – Colombia)	<b>TVES – 2 titles</b> 13. <i>A Puro Corazón</i> (telenovela – Venezuela) 14. <i>Que Pobres Tan Ricos</i> (telenovela – Mexico)  <b>TOTAL PREMIERE TITLES: 29</b> <b>TOTAL RERUN TITLES: 14</b> <b>GENERAL TOTAL OF TITLES BROADCAST: 43</b>

Source: Data revealed by the research, Obitel Venezuela team 2018

International alliances, independent productions and reruns were the alternatives to cover the fiction quotas in Venezuelan TV networks. With the purpose of maintaining a varied programming and cutting down production costs, the TV networks have also incorporated high-quality international fiction from countries such as Iran, Italy, Greece, Turkey, Ukraine, the USA and South Korea, which are not included in Table 1.

**Table 2. Premiere fiction in 2017: countries of origin**

Country	Ti- tles	%	Chapters/ episodes	%	Hours	%
<b>NATIONAL (total)</b>	<b>4</b>	<b>13.8</b>	<b>519</b>	<b>18.7</b>	<b>515:00:00</b>	<b>18.1</b>
<b>OBITEL COUNTRIES (total)</b>	<b>23</b>	<b>79.3</b>	<b>2176</b>	<b>78.2</b>	<b>2269:00:00</b>	<b>79.8</b>
Argentina	1	3.4	80	2.9	68:00:00	2.4
Brazil	0	0.0	0	0.0	0:00:00	0.0
Chile	1	3.4	160	5.8	160:00:00	5.6
Colombia	10	34.5	802	28.8	842:00:00	29.6
Ecuador	0	0.0	0	0.0	0:00:00	0.0
Spain	0	0.0	0	0.0	0:00:00	0.0
USA (Hispanic production)	3	10.3	265	9.5	379:30:00	13.3
Mexico	8	27.6	783	28.2	758:30:00	26.7
Peru	0	0.0	0	0.0	0:00:00	0.0
Portugal	0	0.0	0	0.0	0:00:00	0.0
Uruguay	0	0.0	0	0.0	0:00:00	0.0
Venezuela	3	10.3	426	15.3	515:00:00	18.1
<b>CO-PRODUCTIONS (to- tal)</b>	<b>2</b>	<b>100.0</b>	<b>86</b>	<b>100.0</b>	<b>61:00:00</b>	<b>2.1</b>
Venezuelan co-productions	1	50.0	14	16.3	7:00:00	11.4
Co-productions between Obitel countries	1	50.0	72	83.7	54:00:00	1.9
<b>GENERAL TOTAL</b>	<b>29</b>	<b>93.1</b>	<b>2781</b>	<b>100.0</b>	<b>2845:00:00</b>	<b>100.0</b>

Source: Data revealed by the research, Obitel Venezuela team 2018

In a country fraught with protests and undergoing a severe economic crisis, the tendency to make few national productions and co-productions persists (Table 2). The release of Venezuelan miniseries *La Precursora* was announced. It had been in production since 2013, with ten 30-minute chapters, but it was not aired until 2018.

The prime time continues to be the time slot where the most fiction is aired (Table 3) and the telenovela remains as the main format shown by Venezuelan networks (Table 4). It is important to highlight that during this year telenovelas *Ellas Aman*, *Ellos Mi-enten* and *Para Verte Mejor* introduced a change in their form. The former was presented as a series divided in five sections and a total of 60 chapters; and the latter, initially intended to have 120 chapters, which would be divided in five seasons of 24 episodes, due to the high production costs, was shrunk to four seasons of 93 chapters, with the aim of being aired by Netflix.

Table 3. Chapters/episodes and hours broadcast by time slot

Time slot	National				Ibero-American				Total			
	C/E	%	H	%	C/E	%	H	%	C/E	%	H	%
Morning (6:00-12:00)	0	0.0	0:00:00	0.0	0	0.0	0:00:00	0.0	0	0.0	0:00:00	0.0
Afternoon (12:00-19:00)	153	29.5	153:00:00	29.7	774	34.2	774:00:00	33.2	927	33.3	927:00:00	32.6
Prime time (19:00-22:00)	366	70.5	362:00:00	70.3	1396	61.7	1482:00:00	63.6	1762	63.4	1844:00:00	64.8
Night (22:00-6:00)	0	0.0	0:00:00	0.0	92	4.1	74:00:00	3.2	92	3.3	74:00:00	2.6
Total	519	100.0	515:00:00	100.0	2262	100.0	2330:00:00	100.0	2781	100.0	2845:00:00	100.0

Source: Data revealed by the research, Orbitel Venezuela team 2018

Table 4. Formats of national and Ibero-American fiction

Format	National				Ibero-American			
	Titles	%	C/E	H	Titles	%	C/E	H
Telenovela	2	50.0	246	47.4	19	76.0	1726	76.3
Series	2	50.0	273	52.6	5	20.0	522	23.1
Miniseries	0	0.0	0	0.0	0	0.0	0	0.0
Telefilm	0	0.0	0	0.0	0	0.0	0	0.0
Unitary	0	0.0	0	0.0	0	0.0	0	0.0
Docudrama	0	0.0	0	0.0	0	0.0	0	0.0
Others (unitary series)	0	0.0	0	0.0	0	0.0	0	0.0
Total	4	100.0	519	100.0	25	100.0	2262	100.0

Source: Data revealed by the research, Orbitel Venezuela team 2018



**Table 5. Formats of national fiction by time slot**

Formats	Morn- ing	%	After- noon	%	Prime time	%	Night	%	To- tal	%
<b>Telenovela</b>	0	0.0	1	100.0	1	33.3	0	0.0	2	50.0
<b>Series</b>	0	0.0	0	0.0	2	66.7	0	0.0	2	50.0
<b>Miniseries</b>	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
<b>Telefilm</b>	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
<b>Unitary</b>	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
<b>Docudrama</b>	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
<b>Others</b>	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
<b>Total</b>	<b>0</b>	<b>0.0</b>	<b>1</b>	<b>100.0</b>	<b>3</b>	<b>100.0</b>	<b>0</b>	<b>0.0</b>	<b>4</b>	<b>100.0</b>

Source: Data revealed by the research, Obitel Venezuela team 2018

The prime time continues to be the best slot for airing telenovelas, but it should be pointed out that the afternoon took greater momentum with respect to the previous year, because this time is used most often to air informational and entertainment shows.

**Table 6. Time period of national fiction**

Time period	Titles	%
<b>Present</b>	4	100.0
<b>Period</b>	0	0.0
<b>Historical</b>	0	0.0
<b>Others</b>	0	0.0
<b>Total</b>	<b>4</b>	<b>100.0</b>

Source: Data revealed by the research, Obitel Venezuela team 2018

Table 6 reveals that making a period or historical production in Venezuela is an almost impossible task due to the elevated costs they entail. That is why the present time occupies the first spot in national fiction.

**Table 7. The ten most watched titles**

	Title	Country of original idea or script	Channel	Format/genre	N. of chap./ep. (in 2017)	Time slot	Rating (%)	Share (%)
1	<i>Para Verte Mejor</i>	Venezuela	Venevisión	Telenovela	93	Prime time	3.37	17.04
2	<i>La Dinastía</i>	Colombia	Venevisión	Series	50	Prime time	3.10	16.32

3	<i>Las Hermanitas Calle</i>	Colombia	Televen	Tele-novela	93	Prime time	2.85	19.04
4	<i>Cuando Vivas Conmigo</i>	Colombia	Televen	Tele-novela	72	Prime time	2.60	14.13
5	<i>Silvana Sin Lana</i>	USA	Televen	Tele-novela	95	After-noon	2.50	13.31
6	<i>Un Camino Hacia el Destino</i>	Mexico	Vene-visión	Tele-novela	100	Prime time	2.29	19.32
7	<i>Vino el Amor</i>	Mexico	Vene-visión	Tele-novela	120	After-noon	2.12	18.05
8	<i>Tres Veces Ana</i>	Mexico	Vene-visión	Tele-novela	111	Prime time	2.00	10.30
9	<i>La Suegra</i>	Colombia	Vene-visión	Tele-novela	100	Prime time	1.92	10.00
10	<i>Mi Marido Tiene Familia</i>	Mexico	Vene-visión	Tele-novela	40	Prime time	1.90	11.56
<b>Total productions: 10</b>				<b>Foreign scripts: 9</b>				
100%				90%				

Source: Data revealed by the research, Obitel Venezuela team 2018

Of the ten most viewed titles, seven were aired by Venevisión and three by Televen. Telenovela *Para Verte Mejor* – the only Venezuelan production – positioned itself in the top spot of the rating. That makes it evident that, even though there is an abrupt fall in national TV fiction productions, the viewers continue to prefer national talent. But because of high production costs, the TV networks have replaced national productions for international ones, a practice that seems to happen due to, among other factors, the fact that it is more profitable to buy telenovelas produced in other countries (Carreño, 2017), since the audience continues to show considerable preference for this genre, as shown by the Nielsen results.

**Table 8. Audience profile of the ten most watched titles:  
gender, age, socioeconomic level**

Titles		Channel	Gender %		Socioeconomic level %		
			Women	Men	ABC	D	E
1	<i>Para Verte Mejor</i>	Venevisión	4.26	2.40	3.04	3.84	2.56
2	<i>La Dinastía</i>	Venevisión	3.77	2.37	2.01	3.81	2.18
3	<i>Las Hermanitas Calle</i>	Televen	3.12	2.57	0.73	2.86	3.72
4	<i>Cuando Vivas Conmigo</i>	Televen	3.21	1.94	0.96	2.74	3.07
5	<i>Silvana Sin Lana</i>	Televen	3.06	1.89	0.93	2.85	2.54

6	<i>Un Camino Hacia el Destino</i>	Venevisión	2.97	1.54	1.87	2.09	2.85
7	<i>Vino el Amor</i>	Venevisión	2.81	1.36	1.98	2.14	2.13
8	<i>Tres Veces Ana</i>	Venevisión	2.61	1.34	2.07	2.07	1.84
9	<i>La Suegra</i>	Venevisión	2.27	1.54	2.19	1.68	2.26
10	<i>Mi Marido Tiene Familia</i>	Venevisión	2.4	1.36	1.33	2.20	1.54

Source: Data revealed by the research, Obitel Venezuela team 2018

Titles		Channel	Age groups %							
			4-7	8-11	12-17	18-24	25-34	35-44	45-54	55+
1	<i>Para Verte Mejor</i>	Venevisión	1.51	3.22	4.34	3.27	2.95	3.22	2.52	4.71
2	<i>La Dinastía</i>	Venevisión	1.14	2.47	3.37	2.76	2.26	2.74	3.56	4.87
3	<i>Las Hermanitas Calle</i>	Televen	0.79	3.17	2.35	1.34	2.03	3.22	3.33	4.92
4	<i>Cuando Vivas Conmigo</i>	Televen	1.47	3.85	1.70	1.88	1.40	2.54	2.45	4.86
5	<i>Silvana Sin Lana</i>	Televen	1.70	3.55	1.74	1.74	1.24	2.16	3.06	4.47
6	<i>Un Camino Hacia el Destino</i>	Venevisión	0.67	1.50	1.56	2.43	2.29	2.35	1.05	4.13
7	<i>Vino el Amor</i>	Venevisión	1.16	1.52	2.35	1.55	1.66	2.40	1.15	3.79
8	<i>Tres Veces Ana</i>	Venevisión	0.85	1.55	2.55	2.04	1.84	1.64	0.95	3.41
9	<i>La Suegra</i>	Venevisión	0.50	1.87	1.58	2.58	1.55	1.15	2.14	2.97
10	<i>Mi Marido Tiene Familia</i>	Venevisión	1.33	2.31	1.76	1.46	1.24	1.47	1.49	3.63

Source: Data revealed by the research, Obitel Venezuela team 2018

During the year 2017, TV fiction continued to have women as the audience that was historically faithful to telenovelas, divided in socioeconomic levels D and E, in the age group of over 55 years. The age group 4-7 occupies the lowest percentages with respect to the rest. It should be pointed out that there was a decline of a little over 1% in the socioeconomic level and the age group with respect to the previous year.

### 3. Transmedia reception

Transmedia reception in Venezuela this year consolidates the guideline that the main TV networks have implemented: continuously urging the public to participate through social networks Facebook, Instagram and Twitter and the promotion of their YouTube channels; but with almost no interaction with the public. In this

sense, a novel element this year was the incorporation of *inserts* with Twitter hashtags on Venevisión screen during the broadcast of all of its fiction chapters. Thus, for example, the users would see the hashtag #VallenatoEnVV on the bottom of their screens during the entire broadcast of Colombian drama series *La Dinastía*, or #ParaVerteMejorVV as the national production *Para Verte Mejor* was being aired. This was done to urge them to write on Twitter using these tags. Televen, in turn, chose to promote its YouTube channel<sup>5</sup> and its social networks continuously on its screen.

Despite the fact that the audiences have been urged to participate on the internet social networks, the accounts of the mass media have been characterized, year after year, by their scant interaction with the public. According to the online tool Foller.me<sup>6</sup>, of 100 tweets<sup>7</sup> published by Venevisión account (@venevision), only one was in response to another tweet; 25 of every 100 contain mention<sup>8</sup> to another user (most of them are the artists themselves or other accounts of the channel); and 16 of every 100 posts are retweets<sup>9</sup>. The same site Foller.me reveals that Televen's account (@TelevenTV) does not answer to any tweets made by another user, or does not retweet. Also, 45 of 100 tweets posted on this account mention another user of the network (just like Venevisión, the channel's talent). At the moment this study was being conducted, @venevision had almost 3 million users, while @TelevenTV followed with almost 1.2 million. Venevisión drama series *Para Verte Mejor* concentrated on social network Instagram under the username @paravertevv, which attained over 50 thousand followers. Its 1,460 posts were invitations to watch the chapter on the screen, night after night, by means of flyers made exclusively for this social network with comments on trivia about the plot. The main character in the story, José Ramón Barreto (with username @jrjoseramon), made a live broadcast on

<sup>5</sup> <https://www.youtube.com/user/TelevenTV>

<sup>6</sup> <https://foller.me>

<sup>7</sup> Name given to each post on this network.

<sup>8</sup> Direct interaction with another account, writing the user's name preceded by @.

<sup>9</sup> Resending a tweet posted by another user to the list of an account's followers.

this network after the first chapter had finished airing to interact with his followers.

Another event that must be highlighted this year in Venezuela's particular transmedia reception was the call made by Diosdado Cabello, President of the Partido Socialista Unido de Venezuela (PSUV), to followers to denounce via Twitter the cable TV operators anywhere in the country if they included in their programming channels that were airing Colombian drama *El Comandante*, about the life of former President Hugo Chávez. The inclusion entailed sanctions against the company. The users were supposed to report it, in compliance with the pro-government order, accompanied by the hashtag #AquíNoSeHablaMalDeChávez (no one speaks ill of Chavez here), which had been a campaign promoted by the same political leader. It materialized also in the display of posters bearing the same phrase at the headquarters of public sector offices all over the country: registries, notary's offices, ministries, town halls, governors' offices, health centers, schools, etc. The Twitter accounts of Diosdado Cabello (@dcabellor), Venezolana de Television (@VTVCanal8) and Ernesto Villegas (@VillegasPoljak), who at the moment this campaign was being conducted was the Minister of Communication and Information, were the ones that had used that hashtag the most. By means of an analysis made with the digital tool Hashtagify, it was possible to confirm that, once more, the members of the audience are not the ones who stand out the most in digital dynamics in Venezuela.

#### **4. Highlights of the year**

The government's endeavor for generating contents connected with late President Hugo Chávez's memory stands out. This action is within the framework of the emotive marketing strategies linked with political communication. The objective is to maintain his image and voice among the citizens not only by means of audiovisual narratives, but also by permanently enunciating his name and his project in the contents of the TV networks belonging to the Bo-

livarian Communication and Information System and, especially, Venezolana de Televisión (VTV) and TV Fanb, the Armed Forces TV network.<sup>10</sup> At the beginning of January, the then Minister of the People's Power for Culture, Adán Chávez – brother of the deceased president –, announced that TV series *Chávez de Verdad* was being produced jointly with Villa del Cine in response to series *El Comandante*, by Sony Pictures, starring Andrés Parra. In this regard, President Nicolás Maduro assured: “they are so afraid of Chávez that they are inventing series to try to disfigure a veritable popular leader of the peoples of the Americas and the world and they will not be able to attain their goals, yet, we must counterattack” (EFE, 2017). As part of the “counterattack” actions, the screening of documentary *Los Sueños Llegan con la Lluvia* (2015) was organized. It was produced by Vive TV, in the context of a group of chats called *Ciclo Chávez de Verdad* and the communicative project “Chávez de Verdad”, which will put on the air “film, audiovisual and sound pieces about the legacy left by the Giant of America [...]”. Any attacks they attempt to make on the cultural industry crashes again a reality that is the truth about the life of the Socialist Leader” (Villegas in Notitotal, 2017). With the same purpose, Minister Adán Chávez announced that two feature films would be shot: *De Arañero a Miraflores*, after Luis Britto García's script and directed by Román Chalbaud, and *Chávez, Comandante*, in the charge of governmental company Villa del Cine (Conatel, 2017b). In this context, Argentinean documentary produced by Telesur *Chávez Infinito*, by María Laura Vásquez, was premiered.

The script of series *El Comandante*, by Sony Pictures, created for RCN, was based on the text by Moisés Naim and Venezuelan artists participated in it. It was distributed by Televen, which is an economic and creative effort in which three countries participated.

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<sup>10</sup> It should be remembered that TV Fanb is a government project that has an equivalent in Tegucigalpa (Honduras), with Fuerzas Armadas TV, defined as a “digital, informational, educational and cultural channel” (Fuerzas Armadas TV, 2018). Other examples, along this line, are confirmed by independent channels Army TV Military Channel or Military Channel from USA, which circulate on the internet.

As part of the inexhaustible propaganda strategies used by President Nicolás Maduro, Villa del Cine studies produced the 79th show of *En Contacto con Maduro*, which attempts to emulate controversial *Aló Presidente*, hosted by Hugo Chávez. In this issue President Maduro pretended to “direct” one the scenes of epic mini-series *La Precursora*, produced by the state-run production company, directed by Eduardo Gadea Pérez and in its latest episodes by Alejandro Palacios.

Another element that stands out as novel and unusual is the production of webseries, in which the criminal world is the central topic. Produced with very few resources, many of the actors and producers belong to the neighborhood communities where the plot develops. They aim at an alternative and decentralized way of producing, one that emulates the so-called “guerrilla cinema”. Even though they reveal citizens that have been taught to read and write, people with characteristics of prosumers. It is important to acknowledge that these are low-quality contents, managed from the perspective of pornomiserism, they extol the criminal models that in most cases are redeemed thanks to the fact that they recover ethical values or via the action of faith. Among the series made in this format during 2017 there are: *A Pesar de Todo*, shot in Rio Caribe, State of Sucre; *Y no Es Mentira*, produced in Barquisimeto, State of Lara; *Suerte y Cuídese*, in Charallave, State of Miranda; and the fourth season of *Millonario o Preso*, shot in San Felipe, State of Yaracuy. Other serialized fiction contents made in this production modality focus on religious subjects or humorous parodies such as *Caracas Vice*.

To conclude, it is worth highlighting the broadcast of serialized fiction belonging to Obitel countries on two subscription channels: on TLT (La Tele Tuya), *El Olfateador*, *Los Archivos del Cardenal*, *En Terapia*, *El Tiempo Entre Costuras*, *Marco*, *Camila* and *El Regreso de Lucas*; and on IVC (IVC Network): *Las Aparicio*, *Manual para Ser Feliz*, *Amas de Casa Desesperadas* and *Los Caballeros las Prefieren Brutas*.

## 5. Theme of the year: TV fiction on video on demand platforms

In the case of Venezuela, although the video on demand (VoD) service seems to be gaining ground, its development has faced many obstacles. VoD services are rendered via *streaming*, and, for the system to work properly, it is necessary to have a good internet connection, but Venezuela has the slowest connection in Latin America and the Caribbean. The access speed existing in the country makes it difficult for the user to watch programming online with fluidity, sharpness and without interruptions, given the signal breakdowns. In addition, although there is a great variety of VoD platforms worldwide, the country's severe economic situation prevents the consumers from having access to the most popular platforms, among them: Netflix, Amazon Prime Video, Blim, Hulu, and so on, given that they have to be paid in dollars and at present it is difficult to have foreign currency to cover expenses that prioritize entertainment. Moreover, Venezuela has very few national VoD platforms, and the most popular is Vivo Play, one of the first subscription video on demand proposals in Latin America that distributes contents from different channels from the region, such as Caracol, Telemundo, Telefé, Chilevisión, among others. Said platform contains very little TV fiction, and the domestic production is the least represented, since the platform prioritizes informational and opinion programs. Among the most popular shows produced by Vivo Play itself, *El Reporte Semanal*, with professor Briceño, and *El Show de Bocaranda*, hosted by journalist Nelson Bocaranda stand out.

In view of the existing regulations and self-censorship prevalent on television channels, Vivo Play played an important role by covering the events that occurred during the protests in April 2017. That is why the Bolivarian government, by means of the state-sponsored Conatel, decided to block the signal of said space to prevent the broadcast of the opposition demonstrations, which, according to the government body, could generate unrest in the population. Since then Venezuelans have gotten around several obstacles to overcome the blockade. The same situation occurred with other information-



al digital channels, among them Venezolanos por la Información (VPITV) and the channel of the National Assembly, Capitolio TV, although the two latter can be watched at present without any inconveniences on their YouTube channels.

The US site Pongalo, a worldwide subscription service targeting the Latin public, shows 66 Venezuelan telenovelas from different years, all of them produced by network RCTV. *Estefanía* (1979) is the oldest, written by Julio César Mármol and directed by César Bolívar, and the most recent is *Piel Salvaje* (2016), a drama series written by Martín Hahn inspired in telenovela *La Fiera*, by Julio César Mármol. Other highlights are series for young people *Hoy te Vi* (1998) and *Pura pinta* (2007), as well as emblematic humor show *Radio Rochela*.

VoD portal Viki is found to have similar characteristics. It has a section with Latin American contents, although its main interest is to show productions from China, Taiwan, Japan, Korea, Malaysia, Indonesia and India. Among the Latin American productions present there, several Venezuelan telenovelas produced by Venevisión stand out, such as *El Talismán* (2012), *Voltea pa' que te Enamores* (2014 version), *Cosita Linda* (2014, an adaptation of *Cosita Rica*, 2003), *Los Secretos de Lucía* (2014) and *Amor Secreto* (2015, a remake of telenovela *Buenos Días, Isabel*, 1980).

Despite all of this, we must repeat that the presence of Venezuelan TV fiction on VoD platforms is very scant, above all on better-known platforms such as Netflix and Amazon, whose Latin American market relies mainly on Mexican, Colombian, Brazilian and Argentinean productions. Moreover, very few recent Venezuelan productions are included in VoD systems.

YouTube is a space where it is possible to find Venezuelan productions contents, among them some by the open signal channels, such as VTV, Tves, Venevisión, Televen, or production company RCTV. In most cases, these channels use the platform as storage of old productions or samples of trailers of shows that will be aired on traditional spaces. An exception to this is short feature *Ramón*

(2017), by Hernán Jabes, a film made by Venezuelan-Mexican production company Factor RH, which tells the story of how the inhabitants of a remote *merideña* community travel along an inhospitable road to bury one of their most emblematic characters: Ramón. In addition, there are some romantic comedies, such as webseries *Bleep* (2014, created by Venezuelan production company CPB & Grupo Creativo).

On the other hand, we find a number of Venezuelan youtubers who have seen an opportunity to post their informational, educational and entertainment videos on the famous portal. Although few of their subject matters are fiction, it is possible to locate some dramatized *sketches about different topics, the most popular being humor videos. An example is the work made by Víctor Medina (Nanutria) and Jesús Roldán (Chucho) on their channel Santo Robot.* “At the beginning they only wanted to try their luck, so they uploaded four videos. They set the goal that each of them should be viewed at least 3 thousand times. They fulfilled this target number of views that they wanted and continued their project” (Villareal, 2017). Another youtuber that is very much sought-after is comedian Javier Romero (better known as Hala Madrid), who became popular for his harsh criticism – in a humorous tone – against the government of President Nicolás Maduro. Although at present he does not live in Venezuela, he is still producing videos whose topics focus on everyday Venezuelan events. We also find Ángel David Revilla, better known as Dross Rotzank, another Venezuelan that lives abroad, specifically in Argentina, whose videos about mystery and terror have become very popular. Thus, the community of Venezuelan youtubers grows little by little on this famous portal, and they acknowledge the communicative potential that YouTube has.

A highlight is the presence of contents linked with Venezuela in different international series and telenovelas on VoD platforms. For example, on the last episodes of the third season of famous *House of Cards* (a Netflix original series), one of the characters, Doug Stamper, decides to travel to Caracas to face hacker Gavin Orsay.

Venezuela is presented as the perfect spot for criminals and terrorists to escape the law. Something similar happened on *Homeland* (a series produced by Showtime), on its second season (which can be watched on Netflix), whose story focuses on the escape of US marine Nicholas Brody from his country to Venezuela. When he escapes, Brody arrives in Caracas and he is received by a group who is housed in Torre de David, a symbolic abandoned building that tries to represent, to a certain extent, the decadence of Venezuela.<sup>11</sup> In turn, the remake of famous 1980s series *MacGyver* dealt with the topic of Venezuelan corruption in its first episode. In this chapter, the national government arrests a US reporter and holds her in a clandestine prison; moreover, it is said in the series that Venezuela has the slowest internet in the world, something that has been confirmed by institutions such as Cepal. In Mexican-Colombian-US production *El Señor de los Cielos* (2013), president Nicolás Maduro and his wife, Cilia Flores, were imitated mockingly, in addition to implying that the presidential couple is involved in drug traffic; that is why the show was cancelled in Venezuela.

Thanks to the VoD system and different other digital platforms, viewers have access to certain contents that were banned by the national government, such is the case of series *El Comandante*, *La Reina del Sur* (2011, produced by Telemundo) and *El Capo* (2009, produced by Fox Telecolombia). In the government's view, the topics showed by these productions promoted anti-values that attempt against the Venezuelan family. Nevertheless, these telenovelas can be watched on Netflix and other digital platforms with streaming service such as YouTube.

However, not everything that is related with Venezuela is negative, since, for example, the viewers can enjoy series *Jane the Virgin* (2014) on different platforms. This series, inspired in Venezuelan telenovela *Juana la Virgen* (2002), by RCTV, has become very

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<sup>11</sup> To learn more about this topic, we recommend reading the photo-report "La 'Torre de David' en Caracas", by photographer Jorge Silva, available at [https://elpais.com/el-pais/2014/04/02/album/1396462699\\_312448.html#foto\\_gal\\_7](https://elpais.com/el-pais/2014/04/02/album/1396462699_312448.html#foto_gal_7)

popular among the US and Latin public and it is on its fourth season. Venezuelan talent was sampled on the third season of webseries *Narcos*, produced thanks to the alliance between Netflix, Gaumont International Television and production company Dynamo.

For all the above, it is concluded that TV fiction production that is linked with on demand platforms is still very weak in Venezuela. Even though there is still a long way to go, the road has already been paved.

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## TOP TEN TV FICTION IN OBITEL COUNTRIES

### ARGENTINA

#### 1. *Moisés y los Diez Mandamientos*

**Production:** Record TV (Brazil)

**Direction:** Alexandre Avancini

**Script:** Vivian de Oliveira

**Cast:** Guilherme Winter, Sérgio Marone, Camila Rodrigues, Giselle Itié

**Exhibition date (in 2017):** January 2-February 3

#### 2. *Las Estrellas*

**Production:** Pol-ka Producciones (Argentina)

**Direction:** Sebastián Pivotto, Alejandro Ibáñez, Lucas Gil

**Script:** Marta Betoldi, Mara Pescio, Santiago Guerty

**Cast:** Celeste Cid, Marcela Kloosterboer, Natalie Pérez, Violeta Urtizberea, Justina Bustos

**Exhibition date (in 2017):** May 29-December 30

#### 3. *Josué y la Tierra Prometida*

**Production:** Casablanca for Record TV (Brazil)

**Direction:** Alexandre Avancini

**Script:** Renato Modesto

**Cast:** Sidney Sampaio, Thaís Melchior, Paloma Bernardi, Milhem Cortaz, Rafael Sardão

**Exhibition date (in 2017):** February 6-October 6

#### 4. *Amar Después de Amar*

**Production:** Telefe Contenidos (Argentina)

**Direction:** Miguel Colom, Pablo Vásquez

**Script:** Erika Halvorsen, Gonzalo Demaría, Esteban Garrido, Micaela Libson

**Cast:** Mariano Martínez, Isabel Macedo, Eleonora Wexler, Federico Amador

**Exhibition date (in 2017):** January 23-May 18

#### 5. *Golpe al Corazón*

**Production:** LCA Producciones (Argentina)

**Direction:** Federico Pallazo, Mauro Scandolar

**Script:** Marcelo Nacci, Laura Barneix.

**Cast:** Sebastián Estevanez, Eleonora Wexler, Miguel Ángel Rodríguez, Viviana Saccone, Victorio D'Alessandro



**Exhibition date (in 2017):** September 11-December 29

## 6. *La Fragilidad de los Cuerpos*

**Production:** Pol-ka Producciones, Turner International Argentina, El Trece, Cablevisión (Argentina)

**Direction:** Miguel Cohan

**Script:** Marcos Osorio Vidal

**Cast:** Eva de Dominici, Germán Palacios

**Exhibition date (in 2017):** June 7-July 26

## 7. *Los Milagros de Jesús*

**Production:** Academia de Filmes for Record TV (Brazil)

**Direction:** João Camargo

**Script:** Renato Modesto, Vivian de Oliveira

**Cast:** Chay Suede, Rayana Carvalho, Rodrigo Phavanello, Gustavo Leão, Antônio Grassi

**Exhibition date (in 2017):** January 5-February 3

## 8. *Fanny, la Fan*

**Production:** Underground Producciones (Argentina)

**Direction:** Mariano Ardanaz, Pablo Ambrosini

**Script:** Ernesto Korovsky, Silvina Frejckes, Alejandro Quesada

**Cast:** Agustina Cherri, Luciano Cáceres, Nicolás Furtado, Verónica Llinás, Laura Novoa

**Exhibition date (in 2017):** June 26-July 20

## 9. *Quiero Vivir a tu Lado*

**Production:** Pol-ka Producciones (Argentina)

**Direction:** Alejandro Ibañez, Gustavo Luppi

**Script:** Leandro Calderone, Carolina Aguirre

**Cast:** Mike Amigorena, Paola Krum, Alberto Ajaka, Florencia Peña

**Exhibition date (in 2017):** January 23-May 26

## 10. *Un Gallo para Esculapio*

**Production:** Underground Producciones, Boga Bogagna, TNT (Argentina)

**Direction:** Bruno Stagnaro

**Script:** Bruno Stagnaro, Ariel Staltari, Gabriel Stagnaro, Alicia Garcías

**Cast:** Luis Brandoni, Peter Lanzani, Luis Luque, Julieta Ortega, Ariel Staltari

**Exhibition date (in 2017):** August 16-October 11

## BRAZIL

### 1. *A Força do Querer*

**Production:** Globo (Brazil)

**Direction:** Rogério Gomes, Pedro Vasconcelos

**Script:** Glória Perez

**Cast:** Juliana Paes, Isis Valverde, Paolla Oliveira, Marco Pigossi, Emilio Dantas, Carol Duarte, Maria Fernanda Cândido, Dan Stulbach

**Exhibition date (in 2017):** April 3-October 20

## **2. *O Outro Lado do Paraíso***

**Production:** Globo (Brazil)

**Direction:** Mauro Mendonça Filho, André Felipe Binder

**Script:** Walcyr Carrasco

**Cast:** Bianca Bin, Sérgio Guizé, Marieta Severo, Rafael Cardoso, Thiago Fragoso, Glória Pires, Fernanda Montenegro, Lima Duarte

**Exhibition date (in 2017):** October 23-December 30

## **3. *A Lei do Amor***

**Production:** Globo (Brazil)

**Direction:** Denise Saraceni, Natália Grimberg

**Script:** Maria Adelaide Amaral, Vincent Villari

**Cast:** Cláudia Abreu, Reynaldo Gianecchini, Vera Holtz, José Mayer, Tarcísio Meira, Alice Wegmann, Humberto Carrão, Isabella Santoni

**Exhibition date (in 2017):** January 2-March 31

## **4. *Pega Pega***

**Production:** Globo (Brazil)

**Direction:** Luiz Henrique Rios, Marcus Figueiredo

**Script:** Claudia Souto

**Cast:** Camila Queiroz, Mateus Solano, Irene Ravache, Vanessa Giácomo, Thiago Martins, Mariana Santos, Marcelo Serrado, Nanda Costa

**Exhibition date (in 2017):** June 6-December 30

## **5. *Malasartes***

**Production:** Globo, O2 Filmes, Universal Pictures, Globo Filmes (Brazil)

**Direction:** Paulo Morelli

**Script:** Paulo Morelli

**Cast:** Jesuíta Barbosa, Isis Valverde, Júlio Andrade, Milhem Cortaz, Leandro Hassum, Vera Holtz

**Exhibition date (in 2017):** December 26-December 28

## **6. *Rock Story***

**Production:** Globo (Brazil)

**Direction:** Dennis Carvalho, Maria de Médicis

**Script:** Maria Helena Nascimento

**Cast:** Vladimir Brichta, Nathalia Dill, Alinne Moraes, João Vicente de Castro, Caio Paduan, Rafael Vitti, Ana Beatriz Nogueira, Herson Capri

**Exhibition date (in 2017):** January 2-June 5

### 7. *Sob Pressão*

**Production:** Globo, Conspiração Filmes (Brazil)

**Direction:** Andrucha Waddington

**Script:** Jorge Furtado

**Cast:** Júlio Andrade, Marjorie Estiano, Stepan Nercessian, Bruno Garcia, Orã Figueiredo, Tatsu Carvalho, Pablo Sanábio, Heloísa Jorge

**Exhibition date (in 2017):** July 25-September 19

### 8. *Sol Nascente*

**Production:** Globo (Brazil)

**Direction:** Leonardo Nogueira, Marcelo Travesso

**Script:** Walther Negrão, Suzana Pires, Júlio Fischer

**Cast:** Giovanna Antonelli, Bruno Gagliasso, Rafael Cardoso, Luís Melo, Francisco Cuoco, Aracy Balabanian, Laura Cardoso, Marcello Novaes

**Exhibition date (in 2017):** January 2-March 21

### 9. *Novo Mundo*

**Production:** Globo (Brazil)

**Direction:** Vinícius Coimbra

**Script:** Thereza Falcão, Alessandro Marson

**Cast:** Isabelle Drummond, Chay Suede, Caio Castro, Letícia Colin, Gabriel Braga Nunes, Felipe Camargo, Agatha Moreira,

Rômulo Estrela

**Exhibition date (in 2017):** March 22 –September 25

### 10. *Aldo – Mais Forte que o Mundo*

**Production:** Globo, Black Maria, Universal Pictures, Globo Filmes (Brazil)

**Direction:** Afonso Poyart

**Script:** George Moura, Afonso Poyart, Marcelo Rubens Paiva

**Cast:** José Loreto, Cleo Pires, Jackson Antunes, Claudia Ohana, Milhem Cortaz

**Exhibition date (in 2017):** January 3-January 6

## CHILE

### 1. *Perdona Nuestros Pecados*

**Production:** Mega (Chile)

**Direction:** Nicolás Alemparte

**Script:** Pablo Illanes, Josefina Fernández, Mauricio López

**Cast:** Mario Horton, Mariana Di Girólamo, Álvaro Rudolphy, Patricia Rivadeneira, Paola Volpato, Ximena Rivas, Francisca Gavilán

**Exhibition date (in 2017):** March 6-December 28

### 2. *Señores Papis*

**Production:** Mega (Chile)

**Direction:** Patricio González, Javier Cabieses

**Script:** Rodrigo Cuevas, Ximena

Carrera, Nicolás Wellmann, Isabel Budinich, José Fonseca

**Cast:** Jorge Zabaleta, Francisco Melo, Simón Pesutic, María Gracia Omegna, Francisca Imboden, Francisca Walker

**Exhibition date (in 2017):** January 1-March 6

### 3. *Amanda*

**Production:** AGTV, Mega (Chile)

**Direction:** Matías Stagnaro

**Script:** Luis Ponce, Daniela Lillo, María Luisa Hurtado, Felipe Montero, Lula Almeyda

**Cast:** Daniela Ramírez, Felipe Contreras, Carlos Díaz, Álvaro Gómez, Ignacio Garmendia, Loreto Valenzuela

**Exhibition date (in 2017):** January 2-July 25

### 4. *Verdades Ocultas*

**Production:** AGTV, Mega (Chile)

**Direction:** Felipe Arratia

**Script:** Carlos Oporto

**Cast:** Marcela Medel, Camila Hirane, Carmen Luz Zabala, Matías Oviedo, Osvaldo Silva, Viviana Rodríguez

**Exhibition date (in 2017):** July 24-December 29

### 5. *Tranquilo Papá*

**Production:** Mega (Chile)

**Direction:** Claudio López de Lérica

**Script:** Rodrigo Bastidas, Elena Muñoz, Milena Bastidas, Hugo Castillo, Nicolás Mena

**Cast:** Francisco Melo, Francisca Imboden, Ingrid Cruz, Fernando Godoy, Augusto Schuster

**Exhibition date (in 2017):** April 10-December 29

### 6. *Justicia*

**Production:** Globo (Brazil)

**Direction:** José Luiz Villamarim

**Script:** Manuela Dias

**Cast:** Adriana Esteves, Antonio Calloni, Camila Márdila, Cássio Gabus Mendes, Cauã Reymond

**Exhibition date (in 2017):** November 27-December 21

### 7. *Ámbar*

**Production:** Mega (Chile)

**Direction:** Felipe Arratia, Enrique Bravo

**Script:** Daniella Castagno, Paula Parra, Alejandro Bruna, Felipe Rojas, Raúl Gutiérrez

**Cast:** Sigrid Alegría, Gonzalo Valenzuela, Giulia Inostroza, María José Bello, Álvaro Morales, Coca Guazzini

**Exhibition date (in 2017):** January 3-April 10

### 8. *Totalmente Diva*

**Production:** Globo (Brazil)

**Direction:** Luiz Henrique Rios

**Script:** Rosane Svartman, Paulo Halm  
**Cast:** Marina Ruy Barbosa, Felipe Simas, Fábio Assunção, Juliana Paes, Priscila Steinman

**Exhibition date (in 2017):** July 4-December 29

**9. *Moisés y los Diez Mandamientos***

**Production:** Record TV (Brazil)

**Direction:** Alexandre Avancini

**Script:** Vivian de Oliveira

**Cast:** Guilherme Winter, Sergio Marone, Camila Rodrigues, Giselle Itié, Petronio Gontijo, Denise del Vecchio

**Exhibition date (in 2017):** January 1-January 15

**10. *El Regreso de Lucas***

**Production:** Telefe (Argentina), América Televisión (Peru)

**Direction:** Mauro Scandolari, Gerardo Herrera

**Script:** Bruno Luciani, Martín Méndez, Germán Loza, Paula Manzone, Marcelo Nacci, Laura Barneix

**Cast:** Ana María Orozco, Pablo Martínez, Macarena Achaga, Sergio Gjurinovic, Salvador del Solar, Diego Bertie, Fabrizio Aguilar

**Exhibition date (in 2017):** March 9-June 6

**COLOMBIA**

**1. *Tarde lo Conocí***

**Production:** Caracol (Colombia)

**Direction:** Klych López

**Script:** Juana Uribe, Paola Arias

**Cast:** Maria Elisa Camargo, Roberto Urbina, Daniel Jattin

**Exhibition date (in 2017):** September 12-December 15

**2. *Los Morales***

**Production:** Caracol (Colombia)

**Direction:** Jaime Rayo, Andrés Biermann

**Script:** Arleth Castillo, Adelaida Otalora

**Cast:** Julio Meza, María Laura Quintero, Jerónimo Cantillo

**Exhibition date (in 2017):** May 22-September 9

**3. *Sin Tetas Sí Hay Paraíso***

**Production:** Fox Telecolombia (Colombia)

**Direction:** Diego Mejía

**Script:** Marta Nieto

**Cast:** Carolina Gaitán, Carmen Villalobos, Catherine Siachoque

**Exhibition date (in 2017):** August 24-December 15

**4. *Cuando Vivas Conmigo***

**Production:** Caracol (Colombia)

**Direction:** Andrés Biermann, Rodolfo Hoyos

**Script:** Ana María Parra, Jhonny Cruz

**Cast:** Catherine Escobar, Diego Trujillo, Sandra Reyes

**Exhibition date (in 2017):** January 3-January 6

### 5. *La Nocturna*

**Production:** Caracol (Colombia)

**Direction:** Andrés Marroquín, Germán Porras

**Script:** Ana María Parra, Diego Vivanco

**Cast:** Marcela Carvajal, Jorge Enrique Abello, Carolina Acevedo

**Exhibition date (in 2017):** May 24-October 31

### 6. *Polvo Carnavalero*

**Production:** Caracol (Colombia)

**Direction:** Juan Camilo Pinzón, Carlos Cock

**Script:** Jhonny Ortiz, Adriana Barreto

**Cast:** Isabela Córdoba, Beto Villa, Rafael Zea

**Exhibition date (in 2017):** January 3-May 19

### 7. *La Ley del Corazón*

**Production:** RCN (Colombia)

**Direction:** Victor Mallarino, Sergio Osorio

**Script:** Mónica Agudelo, Felipe Agudelo

**Cast:** Luciano D'Alessandro, Laura Londoño, Iván López

**Exhibition date (in 2017):** January 3-June 6

### 8. *Alias JJ*

**Production:** Caracol (Colombia)

**Direction:** Luis Alberto Restrepo, Jorge Sandoval

**Script:** Thomas McCarty, Gerardo Pinzón

**Cast:** Juan Pablo Urrego, Natasha Klauss

**Exhibition date (in 2017):** February 8-May 23

### 9. *La Cacica*

**Production:** Caracol (Colombia)

**Direction:** Andrés Marroquín, María Gamboa

**Script:** Adolfo Sanjuanello, Karen Rodríguez

**Cast:** Viña Machado, Valeria Henríquez, Kevin Bury

**Exhibition date (in 2017):** November 1-December 15

### 10. *Las Vegas*

**Production:** Vista Productions (Colombia)

**Direction:** Ramiro Meneses, Fabio Rubiano

**Script:** Héctor Moncada, Cecilia Pérez

**Cast:** Natalia Ramírez, Greeicy Rendón, Camila Zárate

**Exhibition date (in 2017):** January 3-February 10

## MEXICO

### 1. *La Rosa de Guadalupe*

**Production:** Televisa (Mexico)

**Direction:** Miguel Ángel Herros

**Script:** Carlos Mercado

**Cast:** diverse actors from the Televisa's Performance Center (CEA)

**Exhibition date (in 2017):** February 2-June 13

### 2. *Enamorándome de Ramón*

**Production:** Televisa (Mexico)

**Direction:** Claudia Aguilar

**Script:** Lucero Suárez

**Cast:** José Ron, Esmeralda Pimentel, Nuria Bages, Fabiola Guajardo, Alfredo Gatica, Luz Elena González

**Exhibition date (in 2017):** May 8-July 30

### 3. *Hoy Voy a Cambiar*

**Production:** Televisa (Mexico)

**Direction:** Hugo Zavala

**Script:** Camilo Torres

**Cast:** Gabriela Roel, Mariana Torres, Ferdinando Valencia, Ari Telch

**Exhibition date (in 2017):** August 21-September 27

### 4. *Mi Marido Tiene Familia*

**Production:** Televisa (Mexico)

**Direction:** Héctor Bonilla

**Script:** Héctor Ferero

**Cast:** Zuria Vega, Daniel Arenas,

Laura Vignatti, José Pablo Minor, Diana Bracho, Rafael Inclán, Lola Merino, Silvia Pinal

**Exhibition date (in 2017):** June 5-October 17

### 5. *Mi Adorable Maldición*

**Production:** Televisa (Mexico)

**Direction:** Sandra Schiffnner

**Script:** Gabriela Ortigoza

**Cast:** Renata Notni, Pablo Lyle, Laura Carmine, Roberto Blándon, Maya Mishalska, Patricia Navidad, Ernesto Gómez Cruz

**Exhibition date (in 2017):** January 23-July 9

### 6. *La Doble Vida de Estela Carrillo*

**Production:** Televisa (Mexico)

**Direction:** Benjamín Cann

**Script:** Norma Madrid

**Cast:** Ariadne Díaz, David Zepeda, Danilo Carrera, África Zavala, Alejandro Tommasi, Sara Corrales

**Exhibition date (in 2017):** February 13-May 21

### 7. *El Bienamado*

**Production:** Televisa (Mexico)

**Direction:** Salvador Garcino

**Script:** Kary Fajer

**Cast:** Jesús Ochoa, Mariluz Bermúdez, Mark Tacher, Andrés Palacios, Chantal Andere, Nora

Salinas, Irán Castillo

**Exhibition date (in 2017):** January 23-June 4

### 8. *Papá a Toda Madre*

**Production:** Televisa (Mexico)

**Direction:** Benjamín Cann

**Script:** Pedro Rodríguez

**Cast:** Sebastián Rulli, Maite Perroni, Juan Carlos Barreto, Sergio Mur, Raúl Araiza

**Exhibition date (in 2017):** October 22-December 29

### 9. *Caer en Tentación*

**Production:** Televisa (Mexico)

**Direction:** Diego Lascuráin

**Script:** Leonardo Bechini

**Cast:** Silvia Navarro, Gabriel Soto, Adriana Louvier, Carlos Ferro, Arath de la Torre, Erika de la Rosa, Julieta Egurrola

**Exhibition date (in 2017):** September 18-December 29

### 10. *La Piloto*

**Production:** Televisa (Mexico)

**Direction:** Fernando Rovzar

**Script:** Jorge Cervantes

**Cast:** Livia Brito, Arap Bethke, Juan Colucho, María Fernanda Yepes, Alejandro Nones, Tommy Vásquez

**Exhibition date (in 2017):** March 7-June 21

## PERU

### 1. *VBQ: Todo por la Fama*

**Production:** América PROTV (Peru)

**Direction:** Luis Barrios

**Script:** Guillermo Aranda, Luis Del Prado, Cinthia McKenzie, José Luis Varela

**Cast:** Flavia Laos, Alessandra Fuller, Mayra Goñi, Pablo Heredia, Patricia Portocarrero, Andrés Vélchez

**Exhibition date (in 2017):** January 2-April 25

### 2. *De Vuelta al Barrio*

**Production:** América Televisión (Peru)

**Direction:** Jorge Tapia, Toño Vega

**Script:** Gigio Aranda

**Cast:** Paul Martin, Mónica Sánchez, Diego Bertie, Yvonne Frayssinet, Adolfo Chuiman, Luciana Blomberg, Claudia Berninzon, Sirena Ortiz

**Exhibition date (in 2017):** May 8-December 29

### 3. *Solo una Madre*

**Production:** Del Barrio Producciones (Peru)

**Direction:** Francisco Álvarez, Aldo Salvini, Claudia Sacha

**Script:** Víctor Falcón, Eduardo Adrianzén

**Cast:** Andrea Luna, Liliana Tru-



jillo, Cindy Díaz, Andre Silva, Laly Goyzueta, Macla Yamada, Óscar Carrillo, Juan Carlos Rey de Castro

**Exhibition date (in 2017):** January 3-June 2

#### 4. *Mujercitas*

**Production:** Del Barrio Producciones (Peru)

**Direction:** Francisco Álvarez, Aldo Salvini, Sandro Méndez

**Script:** Víctor Falcón, Eduardo Adrianzén

**Cast:** Pierina Carcelén, María Grazia Gamarra, Carolina Cano, Vania Accinelli, Briana Botto, Patricia de la Fuente, Rodrigo Sánchez Patiño, Nicolás Galindo

**Exhibition date (in 2017):** June 6-September 22

#### 5. *El Regreso de Lucas*

**Production:** América Televisión (Peru), Telefe (Argentina)

**Direction:** Mauro Scandolari, Gerardo Herrera

**Script:** Manuel Méndez, Bruno Luciani

**Cast:** Ana María Orozco, Salvador del Solar, Diego Bertie, Fabrizio Aguilar, Lucho Cáceres, Pablo Martínez, Macarena Achaga

**Exhibition date (in 2017):** January 2-February 27

#### 6. *Colorina: Madre por Siempre*

**Production:** Del Barrio Producciones (Peru)

**Direction:** Francisco Álvarez, Aldo Salvini, Sandro Méndez

**Script:** Víctor Falcón, Eduardo Adrianzén

**Cast:** Magdyel Ugaz, David Villanueva, Alexandra Graña, Andrea Montenegro, Natalia Torres Vilar, Jesús Neyra, Guillermo Blanco, Emmanuel Soriano

**Exhibition date (in 2017):** December 11-December 29

#### 7. *Colorina*

**Production:** Del Barrio Producciones (Peru)

**Direction:** Francisco Álvarez, Aldo Salvini, Sandro Méndez

**Script:** Víctor Falcón, Eduardo Adrianzén

**Cast:** Magdyel Ugaz, David Villanueva, Alexandra Graña, Andrea Montenegro, Natalia Torres Vilar, Jesús Neyra, Guillermo Blanco, Emmanuel Soriano

**Exhibition date (in 2017):** September 25-December 8

#### 8. *Amores que Matan*

**Production:** América Televisión (Peru)

**Direction:** Jorge Tapia

**Script:** Rosa Mongrutt, Ana Lucía Roeder, Luis del Prado

**Cast:** Mónica Sánchez, Alessandra Fuller, Mayra Couto

**Exhibition date (in 2017):** January 7-April 1

### 9. *Pensión Soto*

**Production:** July Naters (Peru)

**Direction:** July Naters

**Script:** Javier Fuentes Leon, Saskia Bernaola, July Naters

**Cast:** Tatiana Astengo, Giovanni Ciccía, Ximena Díaz, Carlos Palma, Nataniel Sánchez

**Exhibition date (in 2017):** May 21-November 5

### 10. *Los Santos Peruanos*

**Production:** Azul Corporación (Peru), EWTN (USA)

**Direction:** Rubén Enzian Rodríguez

**Script:** Rubén Enzian

**Cast:** Milagros López Arias, Daniel Alberto Ávalos, Luis Galli, Ana María Estrada, Ramón García, Gustavo Mc Lennan, Américo Zuñiga, Willy Noriega

**Exhibition date (in 2017):** April 1

## PORTUGAL

### 1. *A Herdeira*

**Production:** Plural Entertainment (Portugal)

**Direction:** António Borges Correia

**Script:** Maria João Mira

**Cast:** Kelly Bailey, Lourenço Ortigão, Rita Pereira, Pedro Barroso

**Exhibition date (in 2017):** September 24-December 31

### 2. *Ouro Verde*

**Production:** Plural Entertainment (Portugal)

**Direction:** Hugo de Sousa

**Script:** Maria João Costa

**Cast:** Diogo Morgado, Joana de Verona, Luís Esparteiro, Ana Sofia Martins

**Exhibition date (in 2017):** January 8-October 3

### 3. *Amor Maior*

**Production:** SP Televisão (Portugal)

**Direction:** Patrícia Sequeira, Jorge Cardoso

**Script:** Inês Gomes

**Cast:** Inês Castel-Branco, Sara Matos, José Fidalgo, José Mata

**Exhibition date (in 2017):** January 1 –September 30

### 4. *Única Mulher*

**Production:** Plural Entertainment (Portugal)

**Direction:** António Borges Correia

**Script:** Maria João Mira, André Ramalho

**Cast:** Ana Sofia Martins, Lourenço Ortigão, Alexandra Len-

castre, José Wallenstein

**Exhibition date (in 2017):** January 1-January 6

### **5. *Paixão***

**Production:** SP Televisão (Portugal)

**Direction:** Jorge Cardoso

**Script:** Filipa Poppe, Joana Andrade

**Cast:** Albano Jerónimo, Margarida Vila-Nova, Joana Solnado, Marco Delgado

**Exhibition date (in 2017):** September 18-December 31

### **6. *A Impostora***

**Production:** Plural Entertainment (Portugal)

**Direction:** Jorge Queiroga

**Script:** António Barreira

**Cast:** Dalila Carmo, Diogo Infante, Fernanda Serrano, António Pedro Cerdeira

**Exhibition date (in 2017):** January 1-November 30

### **7. *Jogo Duplo***

**Production:** Plural Entertainment (Portugal)

**Direction:** Hugo de Sousa

**Script:** Artur Ribeiro

**Cast:** João Cataré, Sara Prata, Diogo Infante, Fernanda Serrano

**Exhibition date (in 2017):** December 4-December 31

### **8. *Rainha das Flores***

**Production:** SP Televisão (Portugal)

**Direction:** Hugo Xavier

**Script:** Alexandre Castro

**Cast:** Sandra Barata Belo, Isabel Abreu, Pepê Rapazote, Marco Delgado

**Exhibition date (in 2017):** January 1-May 13

### **9. *Espelho d'Água***

**Production:** SP Televisão (Portugal)

**Direction:** Hugo Xavier

**Script:** Gonçalo Pereira

**Cast:** Mariana Pacheco, Vitor Silva Costa, Luisa Cruz, Luciana Abreu

**Exhibition date (in 2017):** May 1-December 31

### **10. *A Força do Querer***

**Production:** Globo (Brazil)

**Direction:** Rogério Gomes, Pedro Vasconcelos

**Script:** Gloria Perez

**Cast:** Ísis Valverde, Marco Pigossi, Fiuk, Bruna Linzmeyer, Paolla Oliveira

**Exhibition date (in 2017):** June 5-December 31

## **SPAIN**

### **1. *Allí Abajo***

**Production:** Plano a Plano

(Spain)

**Direction:** Aitor Gabilondo, César Benítez

**Script:** Óscar Terol, Marta Sánchez, Olatz Arroyo, Natxo López

**Cast:** María León, Jon Plazaola, Iker Galarzta, Óscar Terol, Gorka Aguinagalde, Ane Gabarain, Pepo Oliva, Gorka Otxoa

**Exhibition date (in 2017):** March 3-July 3

## 2. *La que se Avecina*

**Production:** Contubernio (Spain)

**Direction:** Laura Caballero, Alberto Caballero

**Script:** Daniel Deorador, Laura Caballero, Alberto Caballero, Sergio Mitjans, Araceli Álvarez de Sotomayor

**Cast:** Jordi Sánchez, Pablo Chipella, José Luis Gil, Antonio Pagudo, Fernando Tejero, Petra Martínez, Víctor Palmero, Ernesto Sevilla

**Exhibition date (in 2017):** October 4-December 12

## 3. *Cuéntame Cómo Pasó*

**Production:** Grupo Ganga Producciones, RTVE (Spain)

**Direction:** Agustín Crespi, Antonio Cano

**Script:** Eduardo Ladrón de Guevara, Jacobo Delgado, Curro Royo, Sonia Sánchez

**Cast:** Ana Duato, Imanol Arias, Ricardo Gómez, María Galiana, Irene Visedo, Pablo Rivero, Juan Echanove, Paula Gallego

**Exhibition date (in 2017):** January 12-May 25

## 4. *Perdónname, Señor*

**Production:** Gossip Events & Productions (Spain)

**Direction:** Frank Ariza, Alejandro Bazzano

**Script:** Antonio Onetti, Frank Ariza

**Cast:** Paz Vega, Jesús Castro, Stany Coppet, Silvia Marty, Lucía Guerreros, José Manuel Seda, Paco Tous, Juan Gea

**Exhibition date (in 2017):** May 24-July 19

## 5. *El Accidente*

**Production:** Globomedia (Spain)

**Direction:** Daniel Écija, Inés París

**Script:** Daniel Écija, Inés París

**Cast:** Inma Cuesta, Quim Gutiérrez, Berta Vázquez, Alain Hernández, Jorge Bosch, Eusebio Poncela, Daniel Albaladejo, Joel Bosqued

**Exhibition date (in 2017):** November 29-December 26

## 6. *Sé Quién Eres*

**Production:** Arca Audiovisual (Spain)

**Direction:** Pau Freixas, Joaquín Llamas

**Script:** Pau Freixas, Iván Mercadé

**Cast:** Francesc Garrido, Blanca Portillo, Aida Folch, Susana Abaitua, Martiño Rivas, Blanca Apilánez, Carles Francino, Pepón Nieto

**Exhibition date (in 2017):** January 17-April 24

### *7. Tiempos de Guerra*

**Production:** Bambú Producciones (Spain)

**Direction:** Manuel Gómez-Pereira, David Pinillos

**Script:** Ramón Campos, Teresa Fernández-Valdés, Carlos López, Daniel Martín Serrano, Estíbaliz Burgaleta, Nacho Pérez de la Paz

**Cast:** Alicia Borrachero, José Sacristán, Amaia Salamanca, Álex García, Verónica Sánchez, Anna Moliner, Silvia Alonso, Cristóbal Suárez

**Exhibition date (in 2017):** September 20-December 20

### *8. La Casa de Papel*

**Production:** Vancouver Producciones (Spain)

**Direction:** Álex Pina, Jesús Colmenar

**Script:** Álex Pina, Esther Martínez Lobato, Javier Gómez

Santander, Pablo Roa, Fernando Sancristóval

**Cast:** Úrsula Corberó, Paco Tous, Itziar Ituño, Álvaro Morte, Alba Flores, Pedro Alonso, Miguel Herrán, María Pedraza

**Exhibition date (in 2017):** May 2-November 29

### *9. Estoy Vivo*

**Production:** Globomedia (Spain)

**Direction:** Daniel Écija, Jesús Rodrigo

**Script:** Jesús Mesas, Guillem Clua

**Cast:** Javier Gutiérrez, Anna Castillo, Alejo Sauras, Cristina Plazas, Roberto Álamo, Alfonso Bassave, Julia Gutiérrez, Fele Martínez

**Exhibition date (in 2017):** September 7-December 14

### *10. Pulsaciones*

**Production:** Globomedia (Spain)

**Direction:** Emilio Aragón, David Ulloa

**Script:** Emilio Aragón, Francisco Roncal, Carmen Ortiz Carbonero

**Cast:** Pablo Derqui, Leonor Watling, Ingrid Rubio, Meritxell Calvo, Antonio Gil, Juan Diego Botto, Javier Lara, Fernando Sansegundo

**Exhibition date (in 2017):** January 10-March 14

## UNITED STATES

### 1. *El Color de la Pasión*

**Production:** Televisa (Mexico)

**Direction:** Juan Pablo Blanco, Francisco Franco Alva

**Script:** José Cuauhtémoc Blanco, María del Carmen Peña

**Cast:** Erick Elías, Esmeralda Pimentel, Claudia Ramírez, René Strickler, Eugenia Cauduro

**Exhibition starting date (in 2017):** January 2

### 2. *Vino el Amor*

**Production:** Televisa (Mexico)

**Direction:** Salvador Sánchez

**Script:** Janely Lee, Vanesa Varela

**Cast:** Gabriel Soto, Cynthia Klitbo, Azalea Robinson, Irina Baeva, Mar Contreras, Moisés Arizmendi, Verónica Jaspeado, Kimberly Ramos

**Exhibition starting date (in 2017):** January 2

### 3. *El Señor de los Cielos 5*

**Production:** Telemundo (USA), Argos (Mexico)

**Direction:** Luis Selkowicz, Víctor Herrera

**Script:** Luis Colmenares

**Cast:** Rafael Amaya, Fernanda Castillo, Carmen Aub, Sabrina Seara, Vanesa Villela, Maricela González, Mariana Seoane, Miguel Varoni

**Exhibition starting date (in 2017):** June 20

### 4. *El Chema*

**Production:** Telemundo (USA), Argos (Mexico)

**Direction:** Nicolás Di Blasi, Danny Gavidia

**Script:** Luis Selkowicz, Carmina Narro, Iris Dubs, Juan Manuel Andrade

**Cast:** Mauricio Ochmann, Mariana Seoane, Julio Bracho, Sergio Basañez, Itatí Cantoral

**Exhibition starting date (in 2017):** January 2

### 5. *Sin Senos Sí Hay Paraíso 2*

**Production:** Fox Telecolombia (USA, Colombia)

**Direction:** Herney Luna, Edgar Bejarano

**Script:** Gustavo Bolívar, Marta Nieto

**Cast:** Catherine Siachoque, Fabián Ríos, Carmen Villalobos, Carolina Gaitán, Juan Pablo Urrego, Majida Issa

**Exhibition starting date (in 2017):** July 26

### 6. *La Piloto*

**Production:** W Studios (USA, Colombia), Lemon Studios (Mexico), Televisa (Mexico), Univision (USA)

**Direction:** Álvaro Curiel, Rolan-

do Ocampo, Fernando Rovzar

**Script:** Jorge Cervantes, Jörg Hiller

**Cast:** Livia Brito, Arap Bethke, María Fernanda Yepes, Alejandro Nones, María de la Fuente, Verónica Montes, Arturo Barba, Tommy Vásquez

**Exhibition starting date (in 2017):** March 7

### **7. *La Doble Vida de Estela Carrillo***

**Production:** Televisa (Mexico)

**Direction:** Alejandro Álvarez Cenicerros, Rodrigo Hernández, Benjamín Cann

**Script:** Carmen Madrid, Pablo Aramendi, Claudia Velazco, Pedro Rodríguez

**Cast:** Ariadne Díaz, David Zepeda, África Zavala, Danilo Carrera, Erika Buenfil

**Exhibition starting date (in 2017):** May 8

### **8. *Mi Marido Tiene Familia***

**Production:** Televisa (Mexico)

**Direction:** Hector Bonilla

**Script:** Héctor Forero López, Pablo Ferrer García-Travesi, Gabriela Ruffo, Lenny Ferro

**Cast:** Zuria Vega, Daniel Arenas, Diana Bracho, Silvia Pinal

**Exhibition starting date (in 2017):** August 8

### **9. *La Doña***

**Production:** Telemundo (USA), Argos (Mexico)

**Direction:** Carlos Villegas Rosales, Carlos Santos.

**Script:** Basilio Álvarez, Gerardo Cadena, Illay Eskinazi, José Vicente Spataro, Yutzil Martínez.

**Cast:** Aracely Arámbula, David Chocarro, Danna Paola, Rebecca Jones

**Exhibition starting date (in 2017):** January 2

### **10. *El Chapo***

**Production:** Netflix, Univision (USA)

**Direction:** Ernesto Contreras, José Manuel Cravioto

**Script:** Silvana Aguirre

**Cast:** Marco de la O., Humberto Busto, Alejandro Aguilar, Rodrigo Abed, Luis Fernando Peña, Juan Carlos Oliva, Rolf Peterson

**Exhibition starting date (in 2017):** April 23

## **URUGUAY**

### **1. *Verdades Secretas***

**Production:** Globo (Brazil)

**Direction:** Mauro Mendonça Filho, André Felipe Binder, Natália Grimberg

**Script:** Walcyr Carrasco

**Cast:** Rodrigo Lombardi, Drica Moraes, Camila Queiroz, Marieta

Severo, Grazi Massafera, Agatha Moreira, Reinaldo Gianecchini, Gabriel Leone

**Exhibition date (in 2017):** January 2-February 28

## 2. *Moisés y los Diez Mandamientos*

**Production:** Record TV (Brazil)

**Direction:** Alexandre Avancini

**Script:** Vivian de Oliveira

**Cast:** Guilherme Winter, Sérgio Marone, Camila Rodrigues, Petronio Gontijo, Denise Del Vechio, Larissa Macial, Gisselle Itié, Sidney Sampaio

**Exhibition date (in 2017):** January 2-June 2

## 3. *Amanda*

**Production:** Mega (Chile)

**Direction:** Matías Stagnaro

**Script:** Luis Ponce

**Cast:** Daniela Ramírez, Felipe Contreras, Carlos Díaz, Álvaro Gómez, Ignacio Garmendia, Pedro Campos, Loreto Valenzuela, Ignacia Baeza

**Exhibition date (in 2017):** May 23-December 25

## 4. *Reglas del Juego*

**Production:** Globo (Brazil)

**Direction:** Amora Mautner

**Script:** Joao Emanuel Carneiro

**Cast:** Alexandre Nero, Giovanna Antonelli, Cauã Reymond,

Vanessa Giácomo, Marco Pigossi, Tony Ramos, José de Abreu, Eduardo Moscovis

**Exhibition date (in 2017):** January 2-May 25

## 5. *Las Estrellas*

**Production:** Pol-ka Producciones (Argentina)

**Direction:** Sebastián Pivotto, Alejandro Ibáñez

**Script:** Marta Betoldi, Mara Pescio

**Cast:** Celeste Cid, Marcela Kloosterboer, Violeta Urtizberea, Natalie Pérez, Justina Bustos, Luciano Castro, Esteban Lamothe, Nicolás Francella

**Exhibition date (in 2017):** July 18-December 28

## 6. *Josué y la Tierra Prometida*

**Production:** Record TV (Brazil)

**Direction:** Alexandre Avancini

**Script:** Renato Modesto

**Cast:** Sidney Sampaio, Thaís Melchior, Paloma Bernardi, Milhem Cortaz, Rafael Sardao, Paulo Cesar Grande, Nívea Stelman, Mayte Piragibe

**Exhibition date (in 2017):** July 27-December 29

## 7. *Perdona Nuestros Pecados*

**Production:** Mega (Chile)

**Direction:** Nicolás Alemparte

**Script:** Pablo Illanes



**Cast:** Mario Horton, Mariana Di Girólamo, Álvaro Rudolphy, Paola Volpato, Patricia Rivade-neira, Andrés Velasco, César Caillet, Francisca Gavilán

**Exhibition date (in 2017):** December 18-December 28

### 8. *El Maestro*

**Production:** Pol-ka Producciones (Argentina)

**Direction:** Daniel Barone

**Script:** Romina Paula, Gonzalo Demarí

**Cast:** Julio Chávez, Inés Estévez, Juan Leyrado, Carla Quevedo, Luz Cipriota, Eugenia Guerty, Germán Da Silva, María Socas

**Exhibition date (in 2017):** September 27-December 6

### 9. *Velvet*

**Production:** Atresmedia, Bambú Producciones (Spain)

**Direction:** David Pinillos

**Script:** Ángela Armero, Carlos Portela

**Cast:** Paula Echevarría, Miguel Ángel Silvestre, Aitana Sánchez-Guijón, Manuela Velasco, Manuela Vellés, Marta Hazas, Maxi Iglesias, Javier Rey

**Exhibition date (in 2017):** January 2 –January 19

### 10. *Los Ricos no Piden Permiso*

**Production:** Pol-ka Producciones (Argentina)

nes (Argentina)

**Direction:** Gustavo Luppi, Rodolfo Antúnez

**Script:** Marcos Carnevale, Willy Van Broock

**Cast:** Araceli González, Juan Darthés, Luciano Castro, Gonzalo Heredia, Agustina Cherri, Luciano Cáceres, Julieta Cardinali, Sabrina Garciarena

**Exhibition date (in 2017):** January 2-February 10

## VENEZUELA

### 1. *Para Verte Mejor*

**Production:** Venevisión (Venezuela)

**Direction:** Yuri Delgado

**Script:** Mónica Montañés

**Cast:** Michelle de Andrade, José Ramón Barreto, Luis Gerónimo Abreu, Adrián Delgado, Mandi Meza, María Antonieta Duque, Rafael Romero, Sonia Villamizar

**Exhibition date (in 2017):** July 25 –December 5

### 2. *La Dinastía*

**Production:** Caracol TV (Colombia)

**Direction:** Jaime Rayo, Andrés Bierdman

**Script:** Jhonny Ortiz, Adriana Barreto

**Cast:** Julio Meza, Jerónimo Cantillo, Alberto Kammerer, María

Laura Quintero, Valeria Emiliani, Vivian Ossa, Shaira Peláez, Valeria Henríquez

**Exhibition date (in 2017):** August 22 –December 31

### 3. *Las Hermanitas Calle*

**Production:** Caracol TV (Colombia)

**Direction:** Luis Alberto Restrepo, Juan Carlos Vásquez, Jorge Sandoval

**Script:** César Betancourt

**Cast:** Yuri Vargas, Carolina Gaitán, Juan Pablo Urrego, Gill González Hoyos, Caterin Escobar, Crisanto Alonso Vargas Ramírez, Patricia Tamayo, Jaime Correa

**Exhibition date (in 2017):** August 23 –December 31

### 4. *Cuando Vivas Conmigo*

**Production:** Caracol TV (Colombia)

**Direction:** Andrés Birman

**Script:** Ana María Parra

**Cast:** Caterin Escobar, Diego Trujillo, Sandra Reyes, Christian Tappan, Linda Lucía Callejas, María José Vargas, Diego Garzón, Norma Nivia

**Exhibition date (in 2017):** January 9–April 24

### 5. *Silvana sin Lana*

**Production:** Telemundo (USA)

**Direction:** Ellery Albarrán

**Script:** Sandra Velasco

**Cast:** Maritza Rodríguez, Carlos Ponce, Marimar Vega, Adriana Barraza, Thali García, Patricio Gallardo, Alexandra Pomales, Vince Miranda

**Exhibition date (in 2017):** November 28–December 31

### 6. *Un Camino Hacia el Destino*

**Production:** Televisa (Mexico)

**Direction:** Víctor Manuel Foulíou, Víctor Rodríguez

**Script:** María Antonieta Gutiérrez

**Cast:** Paulina Goto, Horacio Pancheri, Jorge Aravena, Ana Patricia Rojo, Brandon Peniche, Lisette Morelos, Manuel Landeta, René Strickler

**Exhibition date (in 2017):** January 1–June 11

### 7. *Vino el Amor*

**Production:** Televisa (Mexico)

**Direction:** Salvador Sánchez

**Script:** Janely Lee

**Cast:** Gabriel Soto, Cynthia Klitbo, Azela Robinson, Irina Baeva, Mar Contreras, Kimberly Dos Ramos, Christian de la Campa, Alejandro Ávila

**Exhibition date (in 2017):** June 12–December 31

**8. *Tres Veces Ana***

**Production:** Televisa (Mexico)

**Direction:** Sergio Cataño

**Script:** Juan Carlos Alcalá

**Cast:** Angelique Boyer, Sebastián Rulli, David Zepeda, Susana Dosamantes, Blanca Guerra, Pedro Moreno, Eric del Castillo, Olivia Bucio

**Exhibition date (in 2017):**  
March 14-July 24

**9. *La Suegra***

**Production:** Caracol TV (Colombia)

**Direction:** Luis Orjuela

**Script:** Ana Fernández Martínez

**Cast:** Jacqueline Arenal, Alberto

Saavedra, María Cecilia Botero, Andrés Parra, Christian Tappan, Isabel Cristina Estrada, Mario Espitia, Laura Perico,

**Exhibition date (in 2017):** February 13-August 21

**10. *Mi Marido Tiene Familia***

**Production:** Televisa (Mexico)

**Direction:** Héctor Bonilla

**Script:** Héctor Forero López, Pablo Ferrer García-Travesí

**Cast:** Zuri Vega, Daniel Arenas, Diana Bracho, Silvia Pinal, Rafael Inclán, Laura Vignatti, José Pablo Minor, Lola Merino

**Exhibition date (in 2017):** December 6-December 31

**SOLO**  
editoração & design gráfico

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# OBITEL 2018

## Ibero-American TV Fiction on Video on Demand Platforms

The Obitel Yearbook offers studies and data on television fiction in Ibero-America for researchers, communication professionals and the general audience since 2007. Obitel has consolidated itself in the Ibero-American field of communication as an international research network that produces analyses of quantitative and qualitative nature with the main objective of identifying, through a comparative study, similarities, specificities, adaptations and appropriations among diverse television narratives produced and aired in the region. The result of this work is an intercultural study that allows us to identify and interpret representations that the different countries make of themselves and of others through the fictional television productions and narratives by which these countries construct and reconstruct daily elements of their cultural identity.

Obitel Yearbook 2018 brings together surveys of 11 national groups that have systematically monitored, during the year 2017, the fiction programs produced and broadcast by the open television channels in their respective countries. In its 13 years of existence, the Observatory has constantly improved its unified methodological protocol, with quantitative and qualitative analysis techniques and procedures, whose result offers both synchronic and diachronic insights into the transformations undergone by television industries in the Ibero-American context.

The theme of Obitel Yearbook 2018, "Ibero-American TV fiction on video on demand platforms", reiterates a trajectory that follows Ibero-American television fiction through scenarios that continually change. Multiple screens, transmissions, new formats, pay TV, user-generated content, among other topics, have been monitored and approached theoretically, year by year, by the teams of the network member countries. In a global environment of intense transformation, Obitel faces a challenge in the field of communication sciences, attempting to bring an exploratory study of the VoD panorama in each country. The aim is to identify and discuss the presence of Ibero-American TV fictions on these platforms.

