

# OBITEL 2020

## Melodrama in Times of Streaming

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Guillermo Orozco Gómez

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IBERO-AMERICAN OBSERVATORY  
OF TELEVISION FICTION

OBITEL 2020

MELODRAMA IN TIMES OF STREAMING



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## PRESENTATION

This Yearbook is a result of a partnership started in 2008 between Globo and the Ibero-American Observatory of Television Fiction (Obitel), which includes editing publications and organizing seminars. The Observatory, which this year publishes its 14th yearbook, aims to monitor and analyze the production, audience and sociocultural impact of TV fiction in Latin America and in 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 (2007-2016)*
- *Obitel Yearbook 2018: Ibero-American TV fiction on video on*

*demand platforms*

- *Obitel Yearbook 2019: Television distribution models by the internet: actors, technologies, strategies*
- *Obitel Yearbook 2020: Melodrama in times of streaming*

**About Globo:**

Besides publications, Globo supports research and promotes courses and seminars in collaboration with Brazilian and foreign institutions about themes considered relevant for society in the communication, arts, management, technology and citizenship areas.

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## EDITOR'S NOTE

This *Obitel Yearbook 2020* is published by Globo/Editora Sulina (Brazil), simultaneously, in three languages: in printed and digital bilingual format (Portuguese/Spanish), and in digital format in English. Its predecessors are:

- *Obitel Yearbook 2007*, published in Spanish by Editorial Gedisa, Spain;
- *Obitel Yearbook 2008*, published in Portuguese and English by Globo Universidade/ Editora Globo, Brazil;
- *Obitel Yearbook 2009*, published in Spanish by the European Observatory on Children's Television (Oeti), Spain; in Portuguese and in English by Globo Universidade/Editora Globo, Brazil;
- *Obitel Yearbook 2010*, published in Portuguese and Spanish by the same editorial group;
- *Obitel Yearbook 2011*, published by Globo Universidade/Editora Globo in Portuguese and Spanish, and in English in digital format;
- *Obitel Yearbook 2012*, *Obitel Yearbook 2013*, *Obitel Yearbook 2014*, *Obitel Yearbook 2015* and *Obitel Yearbook 2016*, published by Globo Universidade/Editora Sulina in Portuguese (printed and digital formats), and in Portuguese, Spanish and English (digital format);
- *Obitel Yearbook 2017*, *Obitel Yearbook 2018* and *Obitel Yearbook 2019*, published by Globo Universidade/Editora Sulina in Portuguese/Spanish and in English in digital format.

Since its creation in Bogotá, in 2005, *Obitel* has focused on the central role of television fiction production in the Ibero-American context, due to the growing interest of different countries in the region to match in a series of policies, going from production to exchange and differentiated media, artistic, cultural and commer-

cial creation. Therefore, in view of the formation of an important geopolitical and cultural reference area, *Obitel* performs not only the quantitative record of the production of fiction programs in the countries belonging to the network, but also the analysis of trends in programming, open TV reception and transmedia reception of television fiction.

Over these 15 years of history, *Obitel* has established itself, in the field of Ibero-American communication, as an international research network that produces and crosses quantitative and qualitative analyses to identify similarities and specificities, adaptations and also appropriations between different national television narratives produced and shown in the region. It is, therefore, an intercultural and comparative study that makes it possible to identify and read issues such as: representations that different countries make of themselves and others through fictional television productions; and cultural indicators through which these countries construct and reconstruct elements of their cultural identity on a daily basis. These approaches allow *Obitel* to build, at the same time, a deep and comprehensive view of the economic strength that fiction acquires on television and in the lives of these countries.

On the other hand, it is worth mentioning the construction and improvement of a unified methodological protocol adopted by all *Obitel* teams over 15 years of yearbooks published. This protocol integrates observation and data collection techniques, a database and norms for quantitative and qualitative analysis, which enables researchers and communication professionals to have a synchronic and diachronic view of the transformations that television industries have been undergoing in the Ibero-American sphere.

The result of all this continuous and coordinated work carried out by *Obitel* has been the much-desired historical series of data and analyses, which are rarely achieved in the scope of research. Equally important has been the partnership between the university and the productive sector, renewed every year, proving that it is possible, because it is desired, to maintain an alliance of interests around the

study of our main television product – the telenovela – and its resulting formats.

For all the above, in the 15 years of Obitel, the general coordinators and coordinators of each country that is member of Obitel reaffirm their commitment to the advancement of the knowledge of television fiction, with the training of their researchers and their professionals, and with the application and intervention of that knowledge in the promotion of a fiction that is increasingly the narrative of our Ibero-American nations.

The general and national coordinators of Obitel wish, once again, to make explicit our thanks to Globo for its continued support and decided participation in the publication and in the annual seminars. Likewise, we reiterate our recognition of the collaboration received from Kantar Ibope Media institutes (Brazil, Argentina, Chile, Colombia, Peru, Uruguay), Nielsen Ibope Mexico (Mexico), GfK/Caem and Marktest (Portugal), Barlovento Comunicación and Kantar Media (Spain) and Nielsen Media Research (United States, Venezuela). Finally, we emphasize our gratitude to all universities and research centers in the countries participating in Obitel for the support and collaboration with their national teams.



## METHODOLOGICAL NOTE

The IBERO-AMERICAN OBSERVATORY OF TELEVISION FICTION, established as Obitel, since its creation, in 2005, has been developed as an intercontinental project in the Ibero-American region, including Latin American and Iberian countries and the United States of Hispanic population. At this time, it is considered important to speak of an Ibero-American scope due to the growing interest of different countries in the region to match in a series of policies of mediatic, artistic, cultural and commercial production and exchange, as well as differentiated creation, which could collaborate to constitute an important area of geopolitical and cultural reference. The observation that Obitel carries out covers at least five dimensions of this vast object of analysis: production, exhibition, consumption, commercialization, and thematic proposals. From the 2010 Yearbook, to these dimensions has been added the phenomenon of “transmedia”, which, although emerging, brings a high potential to understand production itself and expectations of fiction, its distribution and consumption by companies and television channels. With this analysis, we intend to show the new forms in which audiences relate to and connect with television fiction, which now they watch and consume through the internet or on mobile devices, such as smartphones, laptops, tablets, etc.

Since the 2019 Yearbook, we have created, tested and introduced a new research methodology for the methodological protocol focused on internet television distribution models: actors, technologies and strategies. The methodological activities carried out for this 2020 Yearbook were essentially the following:

- 1) systematic monitoring of fiction programs broadcasted on open TV channels of the ten countries that took part in this edition of the Obitel Yearbook;
- 2) generation of comparable quantitative data between these

- countries: schedules, premiere programs, number of chapters, audience profile, central fictional themes;
- 3) identification of plural and bilateral flows of genres and fiction formats, which translates into the ten most viewed fiction titles, their central themes, rating and share;
  - 4) analysis of trends in narrative and in thematic content of each country (consumption data of other media, such as the internet, and other genres of programs, investments in advertising, legal and political outstanding events in the year), as well as all that each national research team may consider “highlights of the year”, especially regarding to changes in production, narratives, and most liked thematic content;
  - 5) analysis of transmedia reception and audience interactions with fiction in each country: the case to be analyzed was selected using as reference any of the ten most watched titles or any other that, due to its particularities, had a peculiar behavior on the internet or any social network;
  - 6) suggestion of a study topic that led the ten teams to a theoretical and methodological articulation around it, whose result intends to be a particular contribution of *Obitel* to television fiction studies, under the title of “Theme of the year”;
  - 7) introduction of new topics of discussion based on a protocol with a systematic monitoring of television fiction distributed over the internet;
  - 8) publication of the results of the systematic monitoring in the form of a yearbook, with special attention to a particular topic. The theme of the year for this 2020 Yearbook is “Melodrama in times of streaming”.

The observation was carried out by a network of research teams from ten countries, at different universities in the Ibero-American region: Argentina, Brazil, Colombia, Mexico, Peru, Portugal, Spain, the United States, Uruguay and Venezuela. We point out that, for imperative reasons, Chile did not take part this year, but it surely will do it in the next yearbook.

The primal sources of audience measurement data were the entities responsible for carrying out these studies in different countries: Kantar Ibope Media (Argentina, Brazil, Chile, Colombia, Peru, Uruguay), Nielsen Ibope Mexico (Mexico), Caem, GfK and Marktest (Portugal), Barlovento Comunicación and Kantar Media (Spain) and Nielsen Media Research (United States). We also worked with the data generated within the research teams using other sources, such as newspaper articles, internet information, audio and video materials, as well as those resulting from direct contacts with agencies and the production of the audiovisual media of each country.

The statistical treatment of the data was carried out according to the productive typologies (programming grid, time slots, duration of each fiction product, chapters or episodes) and the types of measurement (audience rating and share), which allowed the development of comparative tables on the supply conditions and the profiles of television fiction production in each country, including categories such as: volume of programming, formats, producers, screenwriters, creators and exhibition strategies.

The structure of this yearbook is divided into three parts. The first one is an introductory chapter, containing a comparative analysis of fiction in the Obitel countries. This comparison is made from a qualitative perspective that allows observing the development of fiction in each country, highlighting the news and the theme of the year.

In the second part, there are ten chapters (one for each country), with an internal structure in which the sections of the Yearbook are generally fixed, although some of them are more specific than others. The sections that make up each of the chapters are as follows:

- 1) the country's audiovisual context, which presents general information about the audiovisual industry in relation to the production of television fiction, as well as history, trends and most relevant events;
- 2) analysis of the premiere fiction, carried out using various tables that present specific data about the national and Ibero-Ameri-

can programs that premiered in each country. This section especially highlights the ten most viewed titles of the year. Since 2017, the Yearbook also included the five most viewed national titles of the year, in an effort to value and deepen the matter of each country's national identities;

- 3) VoD monitoring, which includes the description of video on demand (VoD) systems in each country and their benefits, as well as the analysis of national and Ibero-American fictions on national and international platforms;
- 4) fiction analysis: open TV, VoD and transmedia expressions in networks, which presents and exemplifies the offer that television stations give to their audiences so that they can watch their productions on the internet, as well as the description of the type of conduct that audiences adopt, by themselves, to view, consume and participate in their fictions on pages and websites. It is fundamentally about understanding in depth the transmedia proposals of open TV;
- 5) the most outstanding productions of the year: the most important ones, not only in terms of audience (rating), but also in terms of sociocultural impact or innovation they have brought to the television industry or market;
- 6) theme of the year, "Melodrama in times of streaming", which aims to identify, through the analysis of characters, themes and narrative plots of melodrama that are circulating on VoD platforms, the particularities of these combinations of the melodramatic mode in various genres and cultural contexts in Ibero-American serial fiction.

The third part of the yearbook is an appendix that compiles the technical files of the ten most viewed fiction titles of the year in each country, with the technical information of these productions.

# FIRST PART

---

FICTION IN THE IBERO-AMERICAN SPACE IN 2019



# INTRODUCTION: IBERO-AMERICAN FICTION IN THE MIDST OF POLITICAL AND TECHNOLOGICAL CHANGES: THE PERSISTENCE OF MELODRAMA AS A NARRATIVE MATRIX

*Authors:*

Gustavo Aprea, Mónica Kirchheimer<sup>1</sup>, Ezequiel Rivero<sup>2</sup>

This year, the Ibero-American Observatory of Television Fiction (Obitel) has dedicated special attention to the persistence of melodrama on screens in times of streaming and the proliferation of deprogrammed and multiscreen consumption. Obitel is made up of 12 countries that monitor the production and distribution of television fiction. For this yearbook, however, it was not possible to count on the participation of Ecuador, since it did not achieve the necessary conditions to work with the common methodology required. Chile, for its part, participated by providing data in order not to interrupt the historical series, but the analytical chapter corresponding to that country is not included either.

## **1. Obitel countries and open TV**

In Chart 1 we summarize the presence of national television channels according to their type of ownership, in the 11 countries that provided data for this yearbook.

---

<sup>1</sup> Professors at Universidad Nacional de las Artes (UNA) and Universidad Nacional de Buenos Aires. Coordinators of Obitel Argentina.

<sup>2</sup> Conicet scholarship holder at Universidad Nacional de Quilmes (UNQ). Researcher of Obitel Argentina.

**Chart 1. National open TV channels in Obitel countries in 2019**

Country	Private	Public	Total
Argentina	5	1	6
Brazil	5	2	7
Chile	6	1	7
Colombia	3	2	5
Spain	4	2	6
United States	5	0	5
Mexico	6	3	9
Peru	5	1	6
Portugal	2	5	7
Uruguay	3	2	5
Venezuela	9	13	22
<b>TOTAL</b>	<b>53</b>	<b>32</b>	<b>85</b>

Source: Obitel

As can be seen, there is a clear dominance of private commercial television over state-owned television in the countries studied. Only Portugal and, to a greater extent, Venezuela have more state-owned stations than private commercial ones. However, in the Venezuelan case, the competitive pressure of the government television stations is marginal, while in Portugal the state-owned RTP1, although in third place, manages to compete for a significant share of audience with the two private stations that lead. In the rest of the countries, the public channels are generally not relevant in terms of audience, but in some cases they function as spaces for the production of alternative content, differentiated from the commercial and quality offer, as for example in Colombia (Señal Colombia), Peru (TV Perú) and Brazil (TV Cultura).

The leadership of open TV is disputed between two private channels. This is the case in Argentina, Colombia, Spain, United States, Portugal, Uruguay and Venezuela. In markets such as Brazil, Mexico and Peru, a single player functions in each case as a clear leader, far from its other competitors.

The trend that Obitel has been reporting for years on the decline in the rating and share of open TV and the slow but steady migration of audiences to other exhibition spaces, particularly those based on the internet, is sustained. This is verified, although with different intensity, in almost all countries: Argentina, Brazil, Portugal, Uruguay, Spain and the United States. While Spain reports very significant declines, USA Hispanic signals show a slighter retraction. On the other hand, with regard to Brazil – a market where open TV fiction captures massive audiences, in proportions unmatched by the rest of the countries –, Obitel reports that, for the first time, a fiction with an average rating of only 20 points managed to be among the top ten most viewed titles.

Pay TV is increasingly positioned as a space for the broadcast of national fictions in Argentina, Mexico and especially Brazil, where the activity is specifically regulated. However, pay TV shows a different picture in relation to the retention of subscribers. As a general trend, there are drops in the number of subscribers in markets such as Mexico, Brazil and Venezuela. Spain and Portugal show a slight rebound from previous years, while the United States reports a sharp fall of nearly 3 million subscribers in the last year alone. Markets such as Argentina and Uruguay seem stable, without major variations in the number of subscribers in the year-on-year ratio.

The advertising market shows a downward trend in Mexico, Spain, Peru and Venezuela, and slight increases in investment in Brazil and Colombia. In all cases, open TV continues to be the medium that captures the largest share of the advertising pie, although the trend has been downwards in recent years in favor of the internet.

However, it is increasingly common for companies to offer triple or quadruple play services. So, in those countries where it happens, as Obitel United States notes, “the very companies that are losing terrain in the corporative division of pay telecommunications are winning subscriptions as internet providers”. This is happening as fixed home broadband connections show an increasing trend in all markets.

In the main markets, the trend reported by the Obitel in the last few years was consolidated, referring to a strategy of alliances between pay TV signals, such as TNT, HBO, Disney and others, with open TV channels, pay TV operators and global distribution platforms, such as Netflix, Movistar+ and Amazon Prime, for the production and distribution of high technical fiction intended for export. This equation includes independent production companies that in each country and increasingly weave alliances of various types and scope with local and global players to whom they provide services for the production of fiction with multiple exhibition channels, including video on demand (VoD) platforms.

## 2. Television fiction in Obitel countries

As for the presence of fiction in the total number of hours broadcast, it is possible to identify two extreme cases and some groupings of intermediate situations. On the one hand, there is Spain, which allocated 42.7% of the hours broadcast to fiction content. On the other hand, is Argentina, which is experiencing a slump in its industry that does not seem to have found its bottom: in 2019, only 7.2% of the hours broadcast were fiction content. In between these two extremes, most other countries range from 20% to 35% of the total programming broadcast by all their air channels.

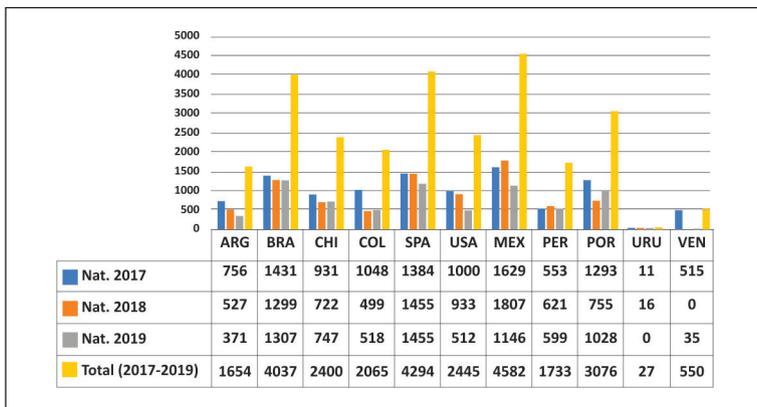
**Chart 2. Share of fiction in total programming**

Country	%
Argentina	7.2
Brazil	11.8
Chile	27.0
Colombia	33.9
Spain	42.7
United States	35.2
Mexico	15.9
Peru	32.8
Portugal	19.9
Uruguay	25.7
Venezuela	22.1

Source: Obitel

The news gained relevance in television programming in 2019 due to the occurrence of political and social events in different countries that aroused general interest. In Argentina, presidential elections were held, a fact that took over the media agenda at least since May 25, when the formula that would finally win was announced. Uruguay also experienced an electoral year that culminated in a change in government after 15 years of Frente Amplio governments. In Peru, the disagreements between the parliamentary majorities and President Vizcarra culminated in the closure of the Congress. In Portugal, attention was focused on mid-term legislative elections and the process of the United Kingdom's exit from the European Union. Chile and Colombia were the scene of street protests that strongly challenged the political class, while in Venezuela a political, social and humanitarian crisis persists.

**Table 1. Hour supply of premiere national fiction (2017-2019)**



Source: Obitel

Observing the production and broadcasting of premiere national fiction in the 11 countries analyzed, it is possible to distinguish a group of countries with more or less accentuated falls in their productive capacity, and another group of countries that are more stable. Despite some year-on-year upturns, it is not possible to speak

of countries where national production has increased significantly. In the first group, Argentina stands out, having seen its television fiction industry collapse uninterrupted over the last decade. *Obitel* Argentina reported 1,094 hours of premiere in 2011 against 371 in 2019. In less than ten years, the country reduced its production capacity by a third. Colombia, the United States and Mexico join the group that has seen its production reduced in recent years. On the other hand, even with some interannual variations, looking at the historical series, countries like Brazil, Chile, Spain, Peru and Portugal maintain a more stable production, each one of them in their scales. Venezuela, given its history as a powerhouse in the export of fiction, is also a particular case that finds this industry in a state of virtual paralysis. This country, along with Colombia, reports that the rerelease of fiction (even in the 1970s and 1980s) was a common strategy to fill the programming schedule of open television in 2019.

Based on the accumulated production of the last three years, a ranking of countries can be established according to their production capacity, dividing them into five categories, as seen in Table 2.

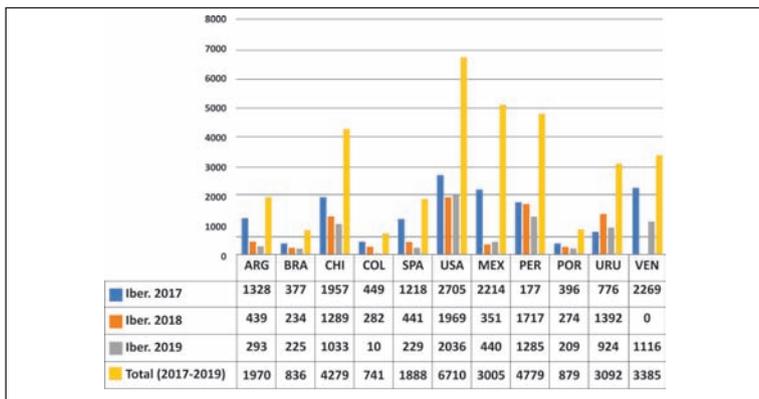
**Table 2. Productive capacity of *Obitel* countries**

High production capacity (+4,000 hours)	Brazil, Spain, Mexico
Medium-high production capacity (3,000-3,999 hours)	Portugal
Medium production capacity (2,000-2,999 hours)	Chile, Colombia, United States
Low-medium production capacity (1,000-1,999 hours)	Argentina, Peru, Venezuela
Low production capacity (0-999 hours)	Uruguay

Source: *Obitel*

The classification of countries according to their ability to produce fiction shows no change from the previous year. In some cases, the number of premiere programs remained the same as the previous year, but the number of hours (expressed in Table 1) fell due to the greater presence of short formats, especially series, miniseries and unitary.

**Table 3. Hour supply of premiere Ibero-American fiction (2017-2019)**



Source: Obitel

Measured in terms of the number of shows, the national premiere telenovela continues to be predominant in Chile, the United States, Mexico, Peru and Portugal, while the series, miniseries and unitary are predominant in countries such as Brazil, Colombia and Spain. In turn, in almost all cases, the telenovela continues to be the most imported format from other countries in the Obitel area, with Mexico being the largest supplier followed by Brazil. In sum, it is possible to say that the telenovela, in many cases with fewer episodes, continues to be the format with the greatest distribution, however there is a trend towards diversification of formats.

In the cases of Argentina, Peru and Portugal, public TV has adopted a relevant role in the creation of innovative fictions, with more risky and experimental aesthetics and narratives. In the case of Argentina's public TV, the series *El Marginal* managed to enter the top ten for the second consecutive year, while TV Perú leveraged a local fiction industry with two shows, failing to produce ten national shows for the first time since Obitel began reporting. In the Portuguese case, RTP Lab took the lead in developing fiction for online platforms in short format and oriented to young audiences.

## 2.1. Themes of television fiction in *Obitel* countries

Fiction tends to get closer to reality and to reflect the issues that are on the public agenda in each of the countries. In Argentina, the main telenovelas and series dealt with complex issues such as human trafficking, prostitution, gender diversity and surrogacy.

Brazil, on the other hand, addressed the issue of refugees and forced diasporas to convey a message in favor of full citizenship for refugees and migrants in the context of the Syrian and Venezuelan crises. In addition, the first fiction with only black actors as protagonists was broadcast, containing a message of antiracism and integration. The production of content with State funds became more complicated in Brazil after the freezing of Ancine funds for promotion. *Obitel* Brazil reports that the government of Jair Bolsonaro vetoed productions on topics related to gender diversity and sexuality. Situations of direct censorship are also reported in Venezuela, where the Spanish-language signal Deutsche Welle was removed from the pay TV offer after broadcasting content critical of that country's government.

In Mexico, topics do not escape the concerns of citizens. This introduced the plot of some problematic fictions such as organized crime, corruption, health, and also gender and domestic violence. Televisa, the country's main open TV channel, is committed to addressing these issues in prime time.

In the case of Peru, there is an interesting public-private partnership to bring a message of awareness to a public health issue through the narration of two fictions. The coordinated work of both fictions from the same network to promote organ donation is reported, based on an initiative by the Ministry of Health of that country. Something similar is verified in Portugal, where the fiction acts as a vehicle for a campaign on flu vaccination, besides including other current issues such as infertility, adultery and xenophobia.

### **3. VoD monitoring**

The decline in the audience of open TV is consolidated along with the changes in viewing habits and the search for new business models by players in the audiovisual industry to combine joint strategies between open TV, pay TV, cable operators and VoD platforms. It is observed that in several countries a new ecosystem of relationships between players, in some cases competitors in the traditional exhibition channels, is beginning to take shape, weaving alliances in the digital world. As we have said, in different countries, the sector of independent production companies is strongly linked to the production of series for platforms such as Netflix, Movistar, Amazon and Claro Video, as well as for traditional channels.

In Spain, Movistar+ is seeking to reach strategic agreements to expand markets within Europe, while Netflix opened its production center for that region in the city of Madrid. In Portugal, Vodafone agreed with HBO to make its streaming service available as an integrated part of its pay TV service. Agreements of this type between pay TV operators and VoD platforms are also replicated in Latin American countries.

In Peru, despite the low levels of connectivity and exclusive consumption of fiction on digital platforms, Movistar Play launched its first three Peruvian platform-exclusive fictions. In Mexico, Televisa placed again some fictions in Netflix after its VoD service, Blim, did not show the expected results of the company Televisa, while TV Azteca placed entertainment content in Amazon Prime. Venezuela is lagging behind in the transformation of the audiovisual industry, particularly because internet connectivity is deficient due to a lack of investment in infrastructure, as noted by Michelle Bachalet, the United Nations High Commissioner for Human Rights, and, at the same time, the economic crisis is making it difficult to access suitable devices for viewing content online.

**Table 4. VoD in Obitel countries**

	ARG	BRA	COL	SPA	USA	MEX	PER	POR	URU	VEN
VoD linked to open TV channels	1	5	3	7	38	1	6	2	4	5
VoD linked to pay TV channels	4	41	2	4	153	9	6	11	5	15
VoD linked to telecommunication companies	5	7	3	4	16	4	4	11	3	2
VoD without links to TV networks	8	32	1	10	31	12	4	11	2	8
<b>GENERAL TOTAL</b>	<b>18</b>	<b>85</b>	<b>9</b>	<b>25</b>	<b>238</b>	<b>26</b>	<b>20</b>	<b>35</b>	<b>14</b>	<b>30</b>

At the national level, in general terms, it can be observed that television channels adopt some kind of policy to make available, even if for a limited time and in a restricted way, the episodes of their fictions on the internet. The strategies they use range from free hosting on YouTube, the creation of their own VoD platforms or the licensing of content already broadcast to other global platforms. Cablevisión Flow, from Argentina (Grupo Clarín), and Globoplay, from Brazil (Globo), are the two most relevant cases, at least in Latin America, of national platform developments that currently have a systematic policy for creating or acquiring exclusive content and with high audience acceptance. Only Globoplay released 11 exclusive programs last year, which shows that the dispute of actors of this magnitude is no longer with their traditional rivals, but with the big global platforms. Something similar happens in Spain with Atresmedia and Mediaset, which have launched their own VoD platforms with paid versions and exclusive content.

**Table 5. National and Ibero-American premiere fiction on VoD in 2019**

	ARG	BRA	CHI	COL	SPA	USA	MEX	PER	POR	URU	VEN
National fiction	13	23	S/D	9	29	95	18	3	5	0	1
Ibero-American fiction	39	25	S/D	31	38	25	7	41	55	60	24

Co-productions	2	2	S/D	0	1	18	1	3	3	4	3
<b>GENERAL TOTAL</b>	<b>54</b>	<b>50</b>	<b>0</b>	<b>40</b>	<b>68</b>	<b>138</b>	<b>26</b>	<b>47</b>	<b>63</b>	<b>64</b>	<b>28</b>

The domain of Netflix is common to all Obitel member countries, although with increasing concurrence of other large players. It is also the platform that, due to its early policy of producing original content, manages to distribute a significant number of original or licensed fictions among the Ibero-American countries. In particular, Netflix has original productions from the countries that have the most interesting markets from the point of view of their size: Mexico, Brazil, Colombia, Argentina and Spain.

The United States is a particular case since the launching of contents or the creation of platforms specifically aimed at the Hispanic public is almost non-existent. In any case, the offer there is limited to VoD platforms of the Hispanic television channels, which have a very limited offer. In this way, Obitel USA counts as “national” English releases of different platforms, not necessarily aimed at the Spanish-speaking viewers. At the same time, there is a paradox: many countries in the Obitel area report as “national” series made under production modalities designed by companies in the United States, which finally hold the property rights over these audiovisual pieces, but that at the narrative level have a “local color” because of their themes, locations, actors and language. This situation reactivates the discussion on the origin of an audiovisual work according to the focus on its cultural or industrial aspects.

A distinctive element in some countries is the presence of state-owned platforms. In Portugal, RTP Play released five fictions in 2019. In Argentina, the Federal System of Public Media maintains the Cont.ar platform, where series already broadcast are distributed and second screening is given to others that have just been released on open TV.

#### 4. Fiction analysis: open TV, VoD and transmedia expressions in networks

As pointed out in previous yearbooks, the strategies of transmedia experience linked to fiction in the *Obitel* field are different and highly articulated with the content allowed by each specific narrative. In the year 2019, various strategies for linking fiction with its viewers can be identified. On the one hand, transmediality is understood as a new screen to view the same production as on open television, whether on the official sites of the television networks or on other official sites such as Facebook or Twitter. Typical contents in these places are expansions of the space linked to the viewers, such as photographs, backstage, bloopers, tests and commentary sections about the available episodes. This strategy is shared by all the fictions studied in this yearbook. In these spaces, the link between the fiction and its audience is extended, as in the case of the Brazilian *A Dona do Pedaço* (Globo, Brazil).

Another form of extension of fiction is linked to the articulation and expansion of fiction with other spaces derived from it. This can be seen as a music marketing strategy in the case of the Colombian *Loquito por Ti* (Caracol, Colombia), which reinforces the period narrative context and its musical theme with the availability of the musical themes in various spaces of on-demand music consumption. Something similar happened with Elsa Santino, a character in the fiction *Terra Brava* (SIC), from Portugal, in which the actress becomes an influencer, or the case of the Spanish *El Nudo* (Antena3), which presents the segment “Desenredando el Nudo”, a weekly space where journalist Marta Robles revealed clues and anticipated valuable information about the police investigation of the plot.

In different countries, experiments were made with transmedia strategies that move from the fictional sphere to non-fictional spaces. This is the case of the Spanish shows released by Antena3: *Matadero*, which presents videos of the characters’ reflections on themselves and their plots (“Destripando el Matadero”), *45 Revolu-*

ciones (“Lo que Yo te Cuento” and “Cerrando ‘El Ondas’”) and *Toy Boy* (“Lejos del Infierno”).

Something similar happens with the show *Pequeña Victoria* (Telefe) in Argentina, in which influencer Amira Chedia comments on attitudes of the fiction’s first mother and compares them to her experience of motherhood. These are first-person testimonies made possible by the scenes included in the fiction.

The format of the interview based on fiction was the transmedia strategy of *As Aventuras de Poliana* (SBT, Brazil), shown on a YouTube channel. There, the character of Dona Branca conducted interviews that complemented the main plot. Uruguay, on the other hand, found in the fiction *Pequeña Victoria* (Canal 4) a space to open the debate on surrogacy, the new family models, both in informative television spaces and in the very spaces of the fiction in the social networks.

One of the most dramatic cases of crossing over from fiction to non-fiction is presented by Peru, which takes advantage of the theme of the telenovela *En la Piel de Alicia* (América Televisión) to put the issue of violence against women on the spot. The rape plot allowed the deployment of different strategies: from surveys and opinions about the characters’ decisions, through the production of Facebook live videos, recordings of the actors talking about the problem, to live interrogations by a social network of the three suspects of the sexual attack. The audience was able to participate in the interrogation by incorporating their own questions. Along with these strategies, the audience was asked questions about various issues related to sexual violence, which allowed for the construction of a space to raise awareness about gender-based violence, even promoting laws and advice on care and protection.

A particular case in which the work with social networks turned against the fiction itself is that of the American show *El Señor de los Cielos* (Telemundo), in its seventh season. It played with the suspense of Rafael Amaya’s return, personifying his character, Aurelio Casillas, causing the fan speculation on the networks about whether

Casillas would actually wake up from the coma in which he was put in the middle of the sixth season. When their expectations were frustrated, fans explicitly invited people to “stop watching” the fiction, which happened, losing an important part of the audience.

## 5. Highlights of the year

In 2019 the highlight continues to be the distancing of audiences from open and generalist television screens in favor of fiction consumption in spaces that offer streaming or VoD platforms. In general terms, as mentioned above, this phenomenon occurs in all the countries included in the analysis and it also leads to a decrease in the investment of open TV in fiction projects. Thus, Uruguay reports a more than notable drop in the retraction of fiction on the television screen, also caused by a year devoted to elections and the Copa America. Spain, on the other hand, has a lower number of releases, fewer episodes and hours of national fiction, while the on-demand viewing platforms increase the number of national programs in their range of offerings. Similarly, Portugal has seen a drop of investment in generalist television screens, so that open TV production is not able to compete with the international production offered by streaming platforms. However, there is one strategy that stands out in the channels’ strategy for the year: Portugal’s commitment to short-lived co-produced fiction, which gave good results. But it is worth mentioning the development of its public TV platform, RTP Play, both as a repository of Portuguese fiction and as a space for new filmmakers; it is an updated and friendly interface, similar to that of private platforms.

Brazil also finds a certain distance from the audience, but it maintains the bet on traditional fiction spaces by time slot. Its 9 pm telenovelas are realistic fictions that deal with subjects that directly question the economic, political and social situation of the country. With the series, at night slot, the stories become a combination of melodrama and naturalistic style. These are the cases of *Segunda Chamada* and *Sob Pressão*, both from Globo. *Segunda Chamada*

approaches themes such as transphobia, racism and schooling in the elderly; *Sob Pressão*, on the other hand, incorporates into the plot the obstacles faced by doctors in a peripheral hospital with cases of a population marginalized from the rights to health. Also, *Bom Sucesso*, by Globo, at 7pm, focused on a fictional plot about Carnival, literature and death, with very good audience results.

As in the case of Brazil, which finds a space for dialogue with social reality, in Peru the already mentioned *En la Piel de Alicia* and *Chapa tu Combi* (both from América Televisión) are put in dialogue with issues of high social sensitivity, such as the problems of gender violence and the case of exploitation and labor slavery, as well as the search for justice. Both fictions deal with problems that are in direct dialogue with the reality of Peruvian society.

Gender identity issues and, in particular, the surrogacy of wombs were addressed by *Pequeña Victoria*, premiered in both Uruguay (Canal 4) and Argentina (Telefe). In both countries it sought to generate debate on these issues in diverse social spheres, beyond the limits of the fictional plot. In Argentina, the reappearance of historical fiction also stands out: *Tierra de Amor y Venganza* (El Trece) sought a nostalgic fiction, which reviews the history of the country from the fictional plot, with emphasis on the immigration processes of the beginning of the century until the middle of the last one.

Colombia also presented a fiction that focused on the past, in this case the 1960s and 1970s. *Loquito por Ti* (Caracol) shows how music allows the central character to overcome difficulties. Similarly, *La Gloria de Lucho* (Caracol) reconstructed the life of the famous shoe cleaner who became a councilman in Bogotá. Besides, both in the United States and in Bogota, biblical fictions from Brazil are gaining space in prime time.

Venezuela finds in spaces far from open television, especially on pay TV, fictions and other events that question the reality of the country. This is the case of the docureality *Venezuela Shore* (YouTube), which generated such a controversy that it was considered a bad influence because it does not represent the nation's values. Also,

foreign fictions that take a position on the critical Venezuelan reality stand out, showing an impoverished country that is opposed to the current leadership of President Maduro.

## **6. Theme of the year: melodrama in times of streaming**

Since the first *Obitel* Yearbook, a more or less continuous process of generic mix was pointed out, especially at the time when American series are gaining space – first, in the offer of pay TV signals and, more recently, VoD and streaming – with a very good performance, moving the audience away from open TV. The continuity of the observation and work carried out by *Obitel* has allowed the countries that make up the observatory to systematically and sustainably monitor the state of the fiction produced and consumed. This work has reported, year after year, the growth of an alternative proposal to open and pay television, as spaces for viewing on demand, which would be followed by the new streaming platforms and, in parallel, by the audience decrease of open TV fiction.

Therefore, and considering that the melodramatic matrix was described by many authors as one of the characteristics that distinguished the production of Latin American and Ibero-American fiction (Martín-Barbero, Monsivais, Rey, Mazziotti, Oroz, etc.), a special section is dedicated to melodrama in times of streaming. The theme of this year aims to find out more about the forms of appearance of the melodrama in times dominated by an increasingly transnational production and a reception that is defined every day as more cosmopolitan and international. Thus, new forms of generic hybridization and mixing of formats are appearing, allowing to offer attractive features to both local and global audiences.

Almost all countries report co-production and fiction presentation strategies for VoD and streaming platforms, but the strategies in different countries are different. Spain, for example, inherits a melodramatic narrative development from the influence on its screen of Venezuelan and Mexican telenovelas on the one hand, and British soap operas on the other. This led to the production of fictions that

sought a closeness with narratives of everyday life, in which this melodramatic matrix is present. More contemporaneously, it reports an increase in plots focused on police investigation and thrillers as a genre. In them it is possible to identify the hybridization between both molds. However, the greater emphasis on the melodramatic can be found in stories that emphasize female protagonism. This protagonism is not limited to the romantic plots, which are present, but also to showing and empowering women both in plots located in a national past and in spaces where women are built as architects of their own destiny. Another way in which melodrama becomes present on on-demand viewing platforms is the return of juvenile narratives, long absent from the open TV screen.

In other countries, as is the case of Venezuela, the incorporation of streaming as one more channel of offer contrasts, insofar as an overabundant offer of fiction appears, with a lost tradition of production of melodramatic serial fiction on open TV. The production capacity has been reduced, so that it is not possible to incorporate national productions into the international offer. In 2019 only four shows were released, not all of them available in national premieres or on VoD platforms. Despite these restrictions, the countries export capacity stands out through the presence of original scripts, companies and Venezuelan talent in various VoD productions.

In Uruguay, on the other hand, given the extension of the national market, the public is used to consuming fictions from very diverse origins. This situation was deepened first through the installation of pay TV and more recently with the popularization of streaming and VoD platforms. Thus, in Uruguay one can choose between “classic” melodramas (among them the most successful ones of Turkish and Chilean origin, which are still offered in fiction) and sophisticated fictions of varied origins, as the ones that are part of Netflix’s catalogue. The rhythm of fruition, with eventual seriality, is favored by the logic of streaming and VoD. This allows the experience of fruition of other media and devices in which melodrama has historically developed, such as the printed media, to be reedited.

From them, a structure of suspense or hook in the closing of episodes and seasons is also taken up, favoring binge watching.

In the case of Colombia, some of the strategies found had to do with the availability on streaming platforms of reprises and a repositioning of the telenovela, as for example with the classic *Yo Soy Betty, la Fea* (RCN). This strategy of incorporating what is established also extends to figures that allow the genre to be referenced and articulated with new scenarios.

Some countries like Portugal find in VoD platforms a second screen for local production. However, it is a country with high quality values in its production and low production costs, which makes it an attractive place for audiovisual production, especially in comparison with other European countries. Also, Portugal is presented as a powerhouse in relation to soap opera as a format (the country has international awards and nominations, having been nominated for the Emmy for best soap opera eight times and winning three times), which was recognized by Netflix by incorporating in its programming soap operas already shown in the country.

Brazil recognizes the transformations that long-lasting narrative has had since the expansion of streaming platforms, especially in a kind of serialization, which has involved, since 2010, the presence of fictions with short plots and arcs, allowing a dynamic flow of stories and characters and expressing agility for action. The opposite path is also explored, that is, a telenovelization of the series, such as the case of *Ingovernable* (since 2017) and *Coisa Mais Linda* (2019 and continues), both by Netflix. In this way, a mixture of genres is evident. Given the privileged place that the telenovela has among Brazilian fictional productions, it is evident that the melodramatic matrix is maintained as a territory that allows for other themes and forms and demonstrates its flexibility in both production and reception spaces.

The model adopted for the distribution of *Orfãos da Terra* (Globo) is representative of the current digital transformation experienced by the audiovisual sector with VoD, rapidly becoming one of the most dynamic parts of the television sector by subverting the

time restriction and providing new forms of reception and participation, more individualized. Aware of this movement, Globoplay offered, in its streaming platform, a national and unprecedented telenovela that mixes the melodramatic cultural matrix with an emerging theme on the global scene: the issue of forced diasporas and refugees.

This adaptive capacity, identified in numerous countries with tradition and capacity for melodramatic production, can also be found in Hispanic production in the United States, where the presence of platforms such as Netflix, Amazon and Hulu has forced North American production in Spanish to find proposals that provide for the consumption of streaming while maintaining the interest of traditional media. Telemundo, for example, has created a new brand, “Series Premium”, for which it has assigned productions with ten episodes and high budgets, more risky or *edgy* narratives, but maintaining daily frequency.

In Peru, there have been few experiences of VoD for television. In this sense, production for platforms has been explored by América Televisión, with diverse economic results. The company has the VoD platform América TVGO, which works especially as a repository and second screen of what has been released by the open signal, however it has released exclusive content on the platform itself. In its organization, América TVGO offers under the classification of “Novelas” a total of 36 shows with all their episodes, out of which 34 are national production.

In Argentina, the television networks have made available VoD spaces both on pay TV and on the internet, seeking to recover the audience (which escaped first to pay television and then to platforms such as Netflix, the most widespread). In these spaces, besides the repository, co-produced programs have also been released, which would later go on to generalist television. Two paths were also experimented in the country: the first, that of independent production companies in association with signals that have VoD exhibition spaces or streaming platforms; the second is a national audiovisual

repository like the one the State made available around 2012 and renamed Cine.ar in 2015. In international spaces, Argentina manages to produce melodramatic fictions with a very specific theme, such as violence and corruption, and with an aesthetic, as mentioned in the analysis of Uruguay, of the excess that characterizes the studied matrix.

Mexico stands out for its production of *La Casa de las Flores* (Netflix), which addresses issues such as homophobia towards LGBT groups. These are common themes in Mexican telenovelas (which also include issues such as racism), but the mentioned show has the particularity of accounting for almost all the variants of the LGBT community in the same family circle. In this case, as often happens in the genre, the characters keep secrets that put into question the state of balance of the story and that will be discovered as the episodes unfold. Unlike classic telenovelas, the periodicity in this case is organized with a series format, and its episodes are about 30-minute long.

As we can see in this overview, melodrama is strongly maintained as a way of structuring a narrative. The presence of VoD and streaming has been gradual in Ibero-American countries. In this process, the different logics of production for the local or Ibero-American market must be readjusted in view of a global market, in which the doors of experimentation seem, initially, open, but, when observing the report of the countries that make up *Obitel*, it is revealed to be narrower. The productive space is minimized; here the players prefer to take advantage of the success and resell proven fictions before risking new alternatives. Where this is the case, it is generally a co-production model, so that the economic risk is also minimized. In any case, the analysis presented throughout this yearbook shows that melodrama continues to play an important role in sentimental formation, incorporating new similarities and ways of confronting values and new aesthetics of hyperbole. This same matrix, we could say, is what expands in the conquest of new formats, its hybridization with new genres, maintaining the fidelity of old audiences and achieving that of the new ones.

## SECOND PART

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FICTION IN OBITEL COUNTRIES IN 2019



# 1

## ARGENTINA: THE FALL OF OPEN TV CONTINUES: PRODUCTION COMPANIES BET ON PLATFORMS WITH THEMES REGARDING MARGINALITY AND CORRUPTION<sup>1</sup>

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### **Introduction**

Serial fiction released in Argentina in 2019 continues to fall. Only one telenovela had more than 200 chapters. To a lesser extent than the previous year, the supply of serialized fiction incorporated themes from the social agenda, especially feminist struggles and the visibility of sexual dissidence. The channels found in the co-production and in the production for platforms one of the ways in which fiction survives. Some of these programs are now on the open television screen. New fiction releases from Ibero-America are also falling.

### **1. Argentina's audiovisual context in 2019**

The audience decrease remains constant, total broadcast hours of fiction are reduced, and audiences continue to leave the open TV screen. The communications market accentuated its historical concentration with the merger between the telephony company Telecom and Cablevisión, the cable operator dependent on the media group Clarín. The media system is currently governed by two national laws that have been intervened since the end of 2015 through decrees and

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<sup>1</sup> Obitel Argentina thanks Kantar Ibope Media, since it would not be possible to carry out some of the analyses presented here without the information provided by this company.

resolutions that operate under a logic of *fait accompli*, transforming the sector's structure without the need to bring a new legal text to parliamentary discussion. The arrival of the new government, in December 2019, opens up some questions about projects in the areas of telecommunications, connectivity, official guidelines and public media, but it is not expected for the time the discussion about a new regulatory framework for the sector.

### 1.1. Open TV in Argentina

The open television system in Argentina is made up of six channels with national coverage. TV Pública is part of the Federal System of Public Media and Contents and is financed by contributions from the National Treasury, official advertising, levies established by the Law of Audiovisual Communication Services and other own resources. The other five channels are privately managed.

**Chart 1. National open television channels in Argentina**

Private networks (5)	Public networks (1)
América 2 (channel 2) El Nueve (channel 9) Telefe (channel 11) El Trece (channel 13) Net TV	TV Pública (channel 7)
<b>Total networks = 6</b>	

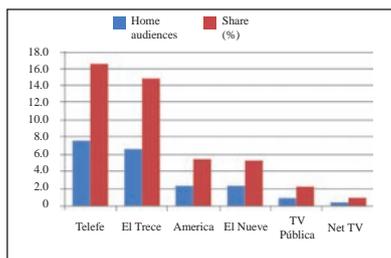
Source: Obitel Argentina

The four traditional channels reach the entire country through subsidiaries, repeater stations or content sales: TV Pública, Telefe, El Trece and El Nueve. Although with marginal audience levels, the air network Net TV (Grupo Perfil), launched in 2018 with generalist and youth programming, continues to operate. In some time slots this new signal disputes the sixth position to a very weakened TV Pública. Only the state broadcaster covers most of the national territory with its signal (99.5%), while the leaders, El Trece and Telefe, reach all the provinces through direct ownership or by association with the main local broadcasters. The six nationwide channels (five

private and one public) broadcast their programming through pay television, which is mostly privately managed and has a high penetration rate in the country. TV Pública formally depends on the board of directors of Radio y Televisión Argentina, Sociedad del Estado (RTA S.E.), which operates within the Federal System of Media and Public Contents (SFMycP), created in 2015. This last political entity was in charge of taking the most relevant decisions that affected the channel between 2016 and 2019. America is part of the group América Medios. El Nueve is part of the international group Al-bavisión, owned by the Mexican Ángel González. Telefe is owned by US-based Viacom Inc. along with eight inland repeaters. Clarín, which is a holding company, operates El Trece through its division named Artear and owns radio stations, newspapers, open channels, and the most important pay TV and fixed broadband companies in the country. It is also co-owner of the only newsprint factory.

**Graph 1. Audience and share by station**

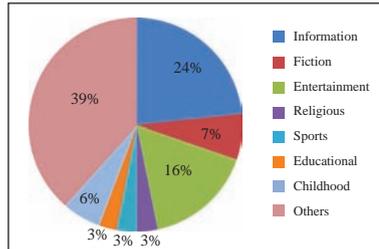
Network	Home audience	%	Share (%)
Telefe	7.6	36.9	16.7
El Trece	6.7	32.7	15.0
América	2.4	11.9	5.5
El Nueve	2.4	11.7	5.4
TV Pública	1.0	4.6	2.1
Net TV	0.4	2.1	1.0
TOTAL	20.6	100.0	45.8



Source: Kantar Ibope Media and Obitel Argentina

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

Genres broadcast	Total hours broadcast	%
Information	11160:00:00	23.4
Fiction	3430:50:00	7.2
Entertainment	7767:00:00	16.3
Religious	1421:05:00	3.0
Sports	1418:00:00	3.0
Educational	1227:50:00	2.6
Childhood	2674:00:00	5.6
Others	18518:00:00	38.9
<b>TOTAL</b>	<b>47616:00</b>	<b>100.0</b>



Source: Kantar Ibope Media and Obitel Argentina

In terms of audience, 2019 shows no significant changes in relation to the previous year, although the trend of a slight loss of rating in open TV continues. Most channels retained almost identical audience levels to 2018, with the exception of TV Pública, which fell again and managed to average just under one point of annual rating, its lowest brand in ten years. Overall, the five air channels captured 45.8% of the share of linear television, a slight increase over the last period, but exceeded by all the pay channels. Journalistic and informative programs represented 23.4% of the total programming, and, despite being the format with the highest participation, a decline of this type of programs can be observed in relation to 2018, which is noteworthy, once 2019 is a presidential election year. There was also an abrupt drop in the total number of hours of fiction shown and its share in the total programming, which was reduced by almost half. For their part, the entertainment and variety shows increased significantly. This is partly explained by El Nueve’s new policy of virtually eradicating fiction from its screen in favor of panel and commentary programs. Likewise, the trend towards the primacy of entertainment over long-format fiction is verified in almost all cases.

## **1.2. Pay TV**

According to data from the National Communications Entity (Enacom) for the third quarter of 2019<sup>2</sup>, 69% of Argentine households had some form of pay TV service, mostly through physical link, while satellite technology captures a smaller market share of less than 20%. If clandestine connections are added, it is estimated that nearly 80% of the country's households would have access to this service, one of the highest penetration levels in the continent. However, according to the same official entity, there are important geographical asymmetries in the access to the service: while provinces such as Córdoba, Tierra de Fuego, La Pampa and the Autonomous City of Buenos Aires show figures above 60%, at the other end Catamarca, Tucumán, La Rioja, among others, are around 25%.

The pay TV market is strongly concentrated in Cablevisión, a division of Grupo Clarín, which controls 40% of the market, especially in provincial capitals and in the most profitable urban centers. There are also about a hundred cooperatives and SMEs that provide this service in more remote places with lower population density and commercial interest, which together handle less than 20% of the subscription TV market.

In the area of fiction, in 2019, there was an intensification of the recent years' trend of alliances between pay TV signals, such as TNT or HBO, with open TV channels and cable TV operators for the production and distribution of fiction with a high technical content, generally designed for a Latin American audience and in short duration formats, with high primacy of the series and miniseries. This year, the strategy of assigning exhibition periods among coproducers with just one day of difference was recurrent. There were several cases of fictions that, once released on free or pay TV, were available in full season format on some video on demand (VoD) platform the following day.

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<sup>2</sup> <https://datosabiertos.enacom.gob.ar/dashboards/20002/television-por-suscripcion-y-satelital/>

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

The Argentine Chamber of Media (Caam), an association that disseminates figures on the advertising market<sup>3</sup>, does so with one-year delay, so at the closing of this yearbook we have information as of December 2018. According to these data, television concentrated 41% of the investment share in the industry, equivalent to \$14.214 billion (Argentine pesos), with a dollar rate close to \$38.90 per peso at that time. At the end of this chapter, the price of one dollar amounts to \$ 64 Argentine pesos. The constant changes in the prices of the economy in the last two years as well as the low reliability of the data published on advertising, usually inflated, make it difficult to adequately measure the real size of the advertising market.

For its part, although television dominates the distribution of the advertising field, it is not the one that shows the best evolution. Radio and internet are the spaces that show the greatest growth in the capture of advertising resources in relation to the previous year, +22% and +19%, respectively.

In his inaugural speech on December 10, 2019, President Alberto Fernández announced that there would be changes in the distribution logic of official advertising, that it would now be used for educational purposes and that it would no longer finance projects by individual journalists (web portals, blogs, online radio, etc.), but it would focus solely on newspaper companies. The media market is waiting for changes in the official policy that could impact them, as the state is the largest individual advertiser, with about 10% of advertising investment.

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

In relation to merchandising, the usual line of recent years was followed, reducing product placement in fictions that reach prime time and maintaining open television as the main means of exhi-

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<sup>3</sup> <https://www.agenciasdemedios.com.ar/inversiones-publicitarias/>

bition. The most watched fiction of the year, *Argentina, Tierra de Amor y Venganza* (El Trece), shows in a historical setting the situation of a young immigrant who recently arrived in the country in the 1930s and fell prey to a human trafficking network that led her into prostitution. The plot turns into the empowerment of this and other women in a strongly conservative and macho context. *Pequeña Victoria* (Telefe) introduces the theme of surrogacy, an unregulated practice in the country, and gives great centrality to the character of a trans woman, who turns out to be the sperm donor. The plot revolves around the vicissitudes and struggle of four women against the prejudices of society.

### **1.5. Communication policies**

At the beginning of 2019, the Competition Commission endorsed Enacom's decision that allowed the merger between Cablevisión (the pay TV distributor of Grupo Clarín) and Telecom (one of the largest fixed, mobile and broadband telephony companies in the country). The new conglomerate controls 42% of fixed telephony, 34% of mobile telephony, 56% of fixed broadband internet connections, 35% of mobile connectivity and 40% of pay TV. Thus, the largest communication concentration in Argentina's history was achieved, exceeding all the limits set by the laws that are still in force, even though reforms have been introduced.

The balance of Mauricio Macri's administration (2016-2019) in terms of communication policies is unprecedented levels of market concentration in Argentina's history, low investment in the sector and a persistent marginalization of the "peripheral" or nonprofit actors in the communication sector, such as cooperative, alternative and popular media, among others. The commitment assumed by the Argentine government before the Inter-American Commission on Human Rights (IACHR) in 2016, regarding the presentation of a Convergent Communications Bill before the National Congress to replace the intervening laws on Audiovisual Communication Services (Law n. 26,522) and Argentina Digital (Law n. 27,078), was

not fulfilled. In the last four years, communications were regulated by decrees or resolutions of lower rank, always in expeditious response to demands from the most concentrated sector of the media and telecommunications. In addition to possible changes to the logic of use and distribution of official funds – an issue addressed by President Alberto Fernández on the day he took office –, so far the serious economic and social situation the country is going through does not place communication policies at the top of the priorities of frontline authorities.

Meanwhile, the development plan of the satellite industry was reactivated with the beginning of the construction of Arsat 3 satellite; also, the tasks of lighting the federal fiber optic network to bring internet connectivity to the whole country continue. Doubts persist about the future of Digital Terrestrial Television, a project – paralyzed during the macrism – in which the State made millionaire investments in infrastructure for the transmission and reception of open digital television signal until 2015. In terms of media, some signs of recovery are beginning to be seen in some public spaces, such as the state news agency Télam, which was in a state of virtual paralysis and in December 2019 began a process of normalization.

## **1.6. Digital and mobile connectivity infrastructure**

Mobile telephony continues to be, along with free and open television, the most widespread information access technology with a nationwide penetration exceeding 100% in almost all regions of the country. However, more than 50% of active mobile lines are pre-paid, usually more widely used among sectors of low socioeconomic level. 4G technology has grown rapidly in recent years, reaching a wide coverage of the territory. However, by the end of 2019, 33 departments in 11 provinces did not have this type of service.

With regard to broadband, the average penetration at national level reaches 65.7% of the country's households, with regions such as the city of Buenos Aires where the adoption of the service is almost total, and other provinces such as Catamarca, Formosa

and Chaco where this figure does not exceed 35% of households. Although the national average speed exceeds 24 Mbps and access offers to more than +30 Mbps are common, most domestic connections are concentrated in the speed range from 1 to 6 Mbps. Fiber optics, one of the most robust technologies with the best capacity to support the transmission of large amounts of data such as VoD, only represents 6.7% of accesses.<sup>4</sup>

The territorial extension added to the dispersion of the population in rural areas or in small urban concentrations, combines with the absence or low quality of the connectivity infrastructure in some regions and the economic difficulties, which prevent access to the Internet. The absence of the market and the state in some areas of the country has allowed the deployment of the activity of telecommunication cooperatives, and more experimentally the emergence of community networks for internet access self-managed by the inhabitants themselves. So far in Argentina, a community network is fully operational in the province of Córdoba (Altermundi) and another in a shantytown in the city of Buenos Aires that also operates in the northern province of Jujuy (Atalaya).

## **1.7. Independent producers**

Only four of the six Argentine channels have created fiction during 2019. Telefe produced *Pequeña Victoria*, its most watched fiction in 2019 through Telefe Contenidos, and went into co-production with Spain through Viacom Inc., the corporation it has belonged to since 2018. El Trece continued to base its fictional programming on its captive production company Pol-ka, which in turn made several co-productions with Walt Disney, TNT and HBO branches for Latin America. TV Pública based all its programming on the work of independent production companies and aired the third season of

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<sup>4</sup> This is official Enacom data. See the ICT, postal and audiovisual market report for the third quarter of 2019 at: <https://indicadores.enacom.gob.ar/files/informes/2019/3T/00%20-%20Indicadores%20de%20Mercado%20-%203T%202019.pdf>

*El Marginal*, produced by Underground, recently acquired by Tele-mundo.

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

**Table 1. Fictions broadcast in 2019 (national and imported; premieres and reruns; co-productions)**

<p><b>PREMIERE NATIONAL TITLES – 17</b></p> <p><b>Telefe – 4 titles</b></p> <ol style="list-style-type: none"> <li>1. <i>Pequeña Victoria</i> (telenovela)</li> <li>2. <i>Campanas en la Noche</i> (telenovela)</li> <li>3. <i>Atrapa a un Ladrón</i> (series)</li> <li>4. <i>Inconvivencia</i> (miniseries)</li> </ol> <p><b>El Trece – 7 titles</b></p> <ol style="list-style-type: none"> <li>5. <i>Argentina, Tierra de Amor y Venganza</i> (telenovela)</li> <li>6. <i>El Host</i> (miniseries)</li> <li>7. <i>El Tigre Verón</i> (miniseries)</li> <li>8. <i>Otros Pecados</i> (unitary)</li> <li>9. <i>Chueco en Línea</i> (miniseries)</li> <li>10. <i>Tu Parte del Trato</i> (miniseries)</li> <li>11. <i>Mi Hermano es un Clon</i> (comedy)</li> </ol> <p><b>Net TV – 1 title</b></p> <ol style="list-style-type: none"> <li>12. <i>Millennials</i> (comedy)</li> </ol> <p><b>TV Pública – 5 titles</b></p> <ol style="list-style-type: none"> <li>13. <i>El Marginal 3</i> (miniseries)</li> <li>14. <i>Mirándote</i> (miniseries)</li> <li>15. <i>Broder</i> (series)</li> <li>16. <i>El Mundo de Mateo</i> (miniseries)</li> <li>17. <i>Derecho Viejo</i> (series)</li> </ol> <p><b>El Nueve – 0</b> <b>América – 0</b></p> <p><b>CO-PRODUCTIONS – 1 title</b></p> <ol style="list-style-type: none"> <li>1. <i>Kally's Mashup</i> (miniseries – Argentina/Mexico)</li> </ol> <p><b>PREMIERE FOREIGN TITLES – 8</b></p>	<p><b>El Nueve – 1 title</b></p> <ol style="list-style-type: none"> <li>5. <i>La Rosa de Guadalupe</i> (telenovela – Mexico)</li> </ol> <p><b>Net TV – 4 titles</b></p> <ol style="list-style-type: none"> <li>6. <i>La Reina del Flow</i> (telenovela – Colombia)</li> <li>7. <i>La Niña</i> (telenovela – Colombia)</li> <li>8. <i>Las Muñecas de la Mafia</i> (telenovela – Colombia)</li> </ol> <p><b>El Trece – 0**</b> <b>América – 0***</b> <b>TV Pública – 0</b></p> <p><b>RERUNS – 3</b></p> <p><b>Telefe – 1 title</b></p> <ol style="list-style-type: none"> <li>1. <i>Casados con Hijos</i> (series – Argentina)</li> </ol> <p><b>Net TV – 1 title</b></p> <ol style="list-style-type: none"> <li>2. <i>El Patrón del Mal</i> (series – Colombia)</li> </ol> <p><b>TV Pública – 1 title</b></p> <ol style="list-style-type: none"> <li>3. <i>Historia de un Clan</i> (miniseries – Argentina)</li> </ol> <p><b>El Trece – 0</b> <b>América – 0</b> <b>El Nueve – 0</b></p> <p><b>TOTAL PREMIERE TITLES: 26</b> <b>TOTAL RERUNS: 3</b> <b>TOTAL TITLES: 29</b></p>
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<p><b>Telefe – 4 titles</b></p> <ol style="list-style-type: none"> <li>1. <i>Bajo Presión</i> (miniseries – Brazil)</li> <li>2. <i>Verdades Secretas</i> (telenovela – Brazil)</li> <li>3. <i>Ojos Sin Culpa</i> (miniseries – Brazil)</li> <li>4. <i>Perra Vida</i> (series – Brazil)</li> </ol>	
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\* Telefe broadcast six Turkish telenovelas: *Cesur*, *Huérfanas*, *Kara para Ask* (cont.), *Lazos de Sangre*, *Mi Vida Eres Tu* and *Una Parte de Mi* (cont.).

\*\* El Trece aired the Turkish telenovela *Amores Cruzados para Siempre*.

\*\*\* America aired the Chinese telenovela *Nirvana en Llamas*.

Source: Kantar Ibope Media and Obitel Argentina

In 2019, 26 shows were released, four less than the previous year. This consolidates a trend that began in 2014, when releases reached 48 shows. In other words, in five years, Argentine open television reduced the number of total releases by almost half. El Trece was the one that released the most shows, but with a high level of mastery of few-chapter formats to the detriment of telenovelas or longer series. In turn, five of the seven shows screened were co-produced by pay TV channels or Grupo Clarín's own company, Cablevisión Flow. Outside the Obitel area, seven Turkish and one Chinese fiction were broadcast, with varying degrees of success in terms of ratings.

**Table 2. Premiere fiction in 2019: countries of origin**

Country	Titles	%	Chapters/ episodes	%	Hours	%
<b>NATIONAL (total)</b>	<b>18</b>	<b>69.2</b>	<b>480</b>	<b>53.3</b>	<b>371:40</b>	<b>55.9</b>
<b>OBITEL COUNTRIES (total)</b>	<b>8</b>	<b>30.8</b>	<b>421</b>	<b>46.7</b>	<b>293:25</b>	<b>44.1</b>
<b>Argentina</b>	15	57.7	456	50.6	354:15	53.3
<b>Brazil</b>	4	15.4	98	10.9	55:20	8.3
<b>Chile</b>	0	0.0	0	0.0	0:00	0.0
<b>Colombia</b>	3	11.5	188	20.9	104:15	15.7
<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>	1	3.8	135	15.0	134:00	20.1
<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>0</b>	<b>0.0</b>	<b>0</b>	<b>0.0</b>	<b>0:00</b>	<b>0.0</b>

<b>National co-productions</b>	<b>3</b>	<b>0.0</b>	<b>24</b>	<b>0.0</b>	<b>21:53</b>	<b>0.0</b>
<b>Ibero-American co-productions</b>	<b>0</b>	<b>0.0</b>	<b>0</b>	<b>0.0</b>	<b>0:00</b>	<b>0.0</b>
<b>TOTAL</b>	<b>26</b>	<b>100.0</b>	<b>901</b>	<b>0.0</b>	<b>665:05</b>	<b>100.0</b>

Source: Kantar Ibope Media and Obitel Argentina

The number of national releases remained the same as in 2018, but the number of hours dropped due to the increased broadcasting of series and miniseries with between three and 12 chapters. In turn, the release of fiction in the Obitel area continues to decrease in number of programs and hours, a trend that has been noticed, at least, since 2017. This is due, in part, to changes in El Nueve's programming policy, which lifted its afternoon telenovelas to replace them with live variety shows. Thus, the weight of national fiction seen in terms of number of shows, episodes and hours slightly exceeds the sum of those coming from the Obitel area.

Considering the number of national premiere shows, once again the miniseries prevails over the other formats. The telenovela, on the other hand, ranks third in terms of the number of national works, but it is first among those coming from the rest of Ibero-America.

Table 3. Formats of national and Ibero-American fiction

Format	National				Ibero-American							
	Titles	%	C/E	%	H	%	Titles	%	C/E	%	H	%
Telenovela	4	22.2	346	72.1	289:30	77.9	5	62.5	373	88.6	268:30	0.9
Series	5	27.8	70	14.6	38:00	10.2	1	12.5	26	6.2	10:10	0.0
Miniseries	8	44.4	54	11.3	36:30	9.8	2	25.0	22	5.2	14:45	0.1
Telefilm	0	0.0	0	0.0	0:00	0.0	0	0.0	0	0.0	0:00	0.0
Unitary	1	5.6	10	2.1	7:40	2.1	0	0.0	0	0.0	0:00	0.0
Docudrama	0	0.0	0	0.0	0:00	0.0	0	0.0	0	0.0	0:00	0.0
Others	0	0.0	0	0.0	0:00	0.0	0	0.0	0	0.0	0:00	0.0
<b>Total</b>	<b>18</b>	<b>100.0</b>	<b>480</b>	<b>100.0</b>	<b>371:40</b>	<b>100.0</b>	<b>8</b>	<b>100.0</b>	<b>421</b>	<b>100.0</b>	<b>293:25</b>	<b>1.0</b>

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

Source: Kantar Ibope Media and Obitel Argentina.

**Table 4. The ten most watched titles on open television**

Title		Country of original idea or script	Channel	Format/genre	N. of chap./ep. (in 2019)	Time slot	Rating	Share
1	<i>Argentina, Tierra de Amor y Venganza</i>	Argentina	El Trece	Telenovela/drama	205	Prime time	13.5	22.7
2	<i>Pequeña Victoria</i>	Argentina	Telefe	Telenovela/drama	51	Prime time	11.0	19.5
3	<i>El Marginal 3</i>	Argentina	TV Pública	Miniseries/drama	8	Prime time	9.7	15.8
4	<i>El Host</i>	Argentina	El Trece	Miniseries/comedy	2	Prime time	9.0	17.2
5	<i>El Tigre Verón</i>	Argentina	El Trece	Miniseries/drama	12	Prime time	8.8	17.1
6	<i>Otros Pecados</i>	Argentina	El Trece	Unitary/drama	10	Prime time	8.8	16.5
7	<i>Bajo Presión</i>	Brazil	Telefe	Miniseries/drama	10	Prime time	8.6	16.3
8	<i>Campanas en la Noche</i>	Argentina	Telefe	Telenovela/drama	80	Prime time	8.5	18.9
9	<i>Chueco en Línea</i>	Argentina	El Trece	Miniseries/comedy	3	Prime time	8.4	18.9
10	<i>Verdades Secretas</i>	Brazil	Telefe	Telenovela/drama	50	Prime time	8.2	19.8
<b>Total productions: 10</b>				<b>Foreign scripts: 2</b>				
100%				20%				

Source: Kantar Ibope Media and Obitel Argentina

**Table 4a. The ten most watched national titles on open television**

Title		Country of original idea or script	Channel	Format/genre	N. of chap./ep. (in 2019)	Time slot	Rating	Share
1	<i>Argentina, Tierra de Amor y Venganza</i>	Argentina	El Trece	Telenovela/drama	205	Prime time	13.5	22.7
2	<i>Pequeña Victoria</i>	Argentina	Telefe	Telenovela/drama	51	Prime time	11.0	19.5
3	<i>El Marginal 3</i>	Argentina	TV Pública	Miniseries/drama	8	Prime time	9.7	15.8
4	<i>El Host</i>	Argentina	El Trece	Miniseries/comedy	2	Prime time	9.0	17.2

5	<i>El Tigre Verón</i>	Argentina	El Trece	Mini-series/drama	12	Prime time	8.8	17.1
6	<i>Otros Pecados</i>	Argentina	El Trece	Mini-series/drama	10	Prime time	8.8	16.5
7	<i>Campanas en La Noche</i>	Argentina	Telefe	Telenovela/drama	80	Prime time	8.5	18.9
8	<i>Chueco en Línea</i>	Argentina	El Trece	Mini-series/comedy	3	Prime time	8.4	18.9
9	<i>Tu Parte del Trato</i>	Argentina	El Trece	Mini-series/drama	8	Prime time	8.0	16.6
10	<i>Mi Hermano es un Clon</i>	Argentina	El Trece	Telenovela/comedy	10	Prime time	7.7	14.6
<b>Total productions: 10</b>				<b>Foreign scripts: 0</b>				
100%				0%				

Source: Kantar Ibope Media and Obitel Argentina

The trend observed in recent years of a slight fall in the average rating and share of the ten most viewed fictions continues. Similar to 2018, two Brazilian shows were in the top ten. As in previous years, Telefe and El Trece share almost equally nine of the ten most watched fictions, while TV Pública, for the second consecutive year, entered the ranking with the third season of *El Marginal*, which went from sixth to third place, although with similar audience figures as in the previous year.

**Table 5. Audience profile of the ten most watched titles: gender, age, socioeconomic level**

Title		Channel	Gender %		Socioeconomic level %			
			Women	Men	ABC1	C2	C3	D
1	<i>Argentina, Tierra de Amor y Venganza</i>	El Trece	58.0	42.0	6.9	36.9	29.5	26.7
2	<i>Pequeña Victoria</i>	Telefe	62.9	37.1	17.1	20.3	28.9	33.7
3	<i>El Marginal 3</i>	TV Pública	42.6	57.4	23.2	20.9	25.5	30.4
4	<i>El Host</i>	El Trece	52.1	47.9	0.3	38.2	30.2	31.3
5	<i>El Tigre Verón</i>	El Trece	52.2	47.8	2.1	31.2	32.3	34.4

6	<i>Otros Pecados</i>	El Trece	57.1	42.9	8.1	36.0	25.2	30.7
7	<i>Bajo Presión</i>	Telefe	60.4	39.6	26.9	14.1	21.4	37.7
8	<i>Campanas en la Noche</i>	Telefe	61.2	38.8	17.1	20.0	28.4	34.5
9	<i>Chueco en Línea</i>	El Trece	53.7	46.3	4.3	34.8	35.0	25.9
10	<i>Verdades Secretas</i>	Telefe	61.8	38.2	20.0	19.8	27.6	32.6

Title		Channel	Age group %				
			4-12	13-18	19-24	35-44	45+
1	<i>Argentina, Tierra de Amor y Venganza</i>	El Trece	13.4	21.6	20.8	22.5	21.7
2	<i>Pequeña Victoria</i>	Telefe	20.4	18.6	18.4	23.7	19.0
3	<i>El Marginal 3</i>	TV Pública	14.6	28.0	29.2	17.9	10.2
4	<i>El Host</i>	El Trece	9.7	23.6	19.9	22.8	24.1
5	<i>El Tigre Verón</i>	El Trece	11.8	24.5	19.2	24.0	20.6
6	<i>Otros Pecados</i>	El Trece	12.4	18.2	21.3	25.6	22.5
7	<i>Bajo Presión</i>	Telefe	22.9	19.8	27.2	15.4	14.7
8	<i>Campanas en la Noche</i>	Telefe	21.4	20.0	22.7	21.9	14.0
9	<i>Chueco en Línea</i>	El Trece	14.4	24.8	21.0	20.2	19.6
10	<i>Verdades Secretas</i>	Telefe	20.3	21.6	22.7	21.4	14.0

Source: Kantar Ibope Media and Obitel Argentina

As in the previous year, an average of 56% of the audience for the most viewed fictions is women. The exception is once again *El Marginal* (TV Pública), whose theme and narrative treatment managed to attract a larger number of male viewers. On the other hand, *Pequeña Victoria* (Telefe), which dealt with maternity, female empowerment, and sexual diversity, was the fiction that attracted the least number of male viewers. In terms of socioeconomic level, 87.4% of the audience is concentrated among segments C2 and D, while there is a drop in the participation of segment ABC1. Almost 45% of the audience is between 13 and 24 years old, while 40% are 34 years old or older. Programs such as *Pequeña Victoria* (Telefe) and *Campanas en la Noche* (Telefe) helped to capture more young audiences in 2019, but the general trend towards an aging audience for serial fiction on open TV continues.

### **3. VoD monitoring**

During 2019, in Argentina, the growth tendency of video on demand platforms as well as the decrease, aging and impoverishment of open TV audiences intensified. Faced with this panorama that is registered at international level, the television networks with production capacity adopt a double policy. On the one hand, to complete hours of programming, they buy long serial fiction at a low cost in relation to local production, such as the seven Turkish telenovelas that were released. On the other hand, they try to partner with both international cable networks (TNT, Disney, Fox and HBO) and VoD platforms, such as Netflix and Cablevision Flow, in order to deal with shorter projects (miniseries) and higher level of production. In this way, they seek to insert themselves within a market that tends more and more to globalization and multiplication of exhibition screens.

#### **3.1. VoD in Argentina**

Among the VoD services with greater presence in Argentina, we find the “new entrants” not linked to traditional TV channels, such as Netflix, initiatives linked to open TV channels, pay TV signals, cable operators and telecommunication companies. In the case of Argentina, there are also state-owned online video distribution services, such as Cine.ar Play, from the Institute of Film and Audiovisual Arts (Incaa), and Cont.ar, from the Federal System of Public Media and Content, which, in general terms, offer public media content together with fiction films and series produced with state funding. According to Ovum data, by 2019 there would be 2,954,129 unique subscribers to VoD services in Argentina. This figure does not reflect actual users due to the practices of family use of the same account and password sharing. Data from the consulting firm Business Bureau (BB) for the second quarter of 2019 indicate that Netflix has 55% of the market, followed by Cablevision Flow (9%), HBO Go (6%), Telecentro Play (5%), Amazon Prime Video

(3%) and others (22%).<sup>5</sup> According to information provided by Gerardo Sanchez, coordinator of the Cultural Information System of Argentina (SInCA)<sup>6</sup>, in 2018, only US\$ 200 million in subscriptions to Netflix left the country. The new government is debating possible taxes and other benefits for production companies hired by global platforms to produce Argentine content.

**Chart 2. VoD in Argentina**

	<b>Platforms</b>	<b>Total</b>
<b>VoD linked to open TV networks</b>	MiTelefe (Viacom)	<b>1</b>
<b>VoD linked to pay TV networks</b>	HBO Go, Fox Premium, TNT Go, WatchESPN	<b>4</b>
<b>VoD linked to telecommunication companies and pay TV</b>	Flow (Cablevisión), Claro Video (América Móvil), Movistar + (Telefónica), DirecTV Go (AT&T), Sensa (Colsecor)	<b>5</b>
<b>VoD without links to TV networks</b>	Netflix, Amazon Prime, Qubit.tv, Mubi, Vivo Play, Crackle, Cine.ar Play, Cont.ar (National State)	<b>8</b>
<b>TOTAL</b>		<b>18</b>

Source: Obitel Argentina

### 3.2. Earnings from VoD systems

According to Ovum's projections for 2019, the estimated profits for the VoD sector in Argentina were US\$ 194 million, a growing figure, but far from the US\$ 3,164 million or the US\$ 6,707 million that the same consulting firm estimated for pay TV and mobile phone business, respectively, in the same period.<sup>7</sup> For this reason, VoD is, as in the rest of Latin America, a market with great margin for growth. This explains part of the expansion strategy towards Latin America of Netflix and other platforms that already start to see signs of stagnation in their markets of origin.

<sup>5</sup> This is data from BB New Media Essentials 2Q2019.

<sup>6</sup> <https://www.estebanmagnani.com.ar/2020/01/30/mucho-mas-que-divisas/>

<sup>7</sup> These are Ovum data presented by Sonia Agnese (senior analyst, Latin America) in the report "Argentina: mobile, broadband, TV and OTT video report", of June 2018.

### 3.3. VoD analysis in 2019: national and Ibero-American premiere fiction

According to reports from Parrot Analytics, the most requested premiere on demand content by Argentines in September 2019 was *Stranger Things* (Netflix), with more than 6 million “expressions of demand”<sup>8</sup>, followed by *Steven Universe* (4.1 million) and *13 Reasons Why* (3.6 million). The only national title of the ten most “demanded” shows is the series *El Marginal* (3.6 million), which appears in fourth place.

**Table 6. National and Ibero-American fiction broadcast on VoD in 2019**

Premiere national titles	Ibero-American premiere titles	Co-productions
<b>Cablevisión Flow – 6 titles</b> 1. <i>Inconveniencia</i> (series) 2. <i>Chueco en Línea</i> (miniseries) 3. <i>El Mundo de Mateo</i> (miniseries) 4. <i>Tu Parte del Trato</i> (series) 5. <i>El Tigre Verón</i> (series) 6. <i>Influencers</i> (miniseries)	<b>Netflix – 24 titles</b> 1. <i>Historias de un Crimen: Colmenares</i> (series, Colombia) 2. <i>Tijuana</i> (series, Colombia) 3. <i>Distrito Salvaje</i> (series, Colombia) 4. <i>Días de Navidad</i> (miniseries, Spain) 5. <i>Club de Cuervos 4</i> (series, Mexico) 6. <i>Siempre Bruja 1 and 2</i> (series, Colombia) 7. <i>Vivir sin Permiso</i> (series, Spain) 8. <i>Coisa Mais Linda</i> (series, Brazil) 9. <i>Samantha! 2</i> (series, Brazil) 10. <i>El Mecanismo 2</i> (series, Brazil) 11. <i>Alta Mar</i> (series, Spain) 12. <i>3% 3</i> (series, Brazil) 13. <i>Hache</i> (series, Spain) 14. <i>La Casa de las Flores</i> (series, Mexico) 15. <i>Paquita Salas 3</i> (series, Spain) 16. <i>O Escolhido 2</i> (series, Brazil) 17. <i>La Casa de Papel 3</i> (series, Spain) 18. <i>Las Chicas del Cable 4</i> (series, Spain)	<b>Amazon Prime – 1 title</b> 1. <i>Hernán</i> (series – Spain, Mexico)
<b>Netflix – 3 titles</b> 7. <i>Apache</i> (series) 8. <i>Go! Vive a tu Manera</i> (series) 9. <i>Monzón</i> (series)		<b>Cablevisión Flow – 1 title</b> 2. <i>Atrapa a un Ladrón</i> (series – Spain, Argentina)
<b>Cine.ar Play – 2 titles</b> 10. <i>Cuenta Regresiva</i> (series) 11. <i>Secreto Bien Guardado</i> (miniseries)		

<sup>8</sup> For more details on the measurement methodology and the construction of the “demand expressions” metric, see: <http://papel.revistafibra.info/la-clave-es-generar-atencion-para-poder-monetizar-los-contenidos-en-internet/>

<b>Cont.ar – 1 title</b>	19. <i>Sintonía</i> (series, Brazil)	
12. <i>Broder</i> (miniseries)	20. <i>Frontera Verde</i> (series, Colombia)	
<b>HBO Go – 1 title</b>	21. <i>Vis a Vis 3 and 4</i> (series, Spain)	
13. <i>El Jardín de Bronce 2</i> (series)	22. <i>Élite 2</i> (series, Spain)	
	23. <i>Monarca</i> (series, Mexico)	
	24. <i>Criminal: Spain</i> (miniseries, Spain)	
	<b>Movistar+ – 4 titles</b>	
	25. <i>Merlí, Sapere Aude</i> (series, Spain)	
	26. <i>Justo Antes de Cristo</i> (miniseries, Spain)	
	27. <i>La Cacería</i> (series, Chile)	
	28. <i>Berko, el Arte de Callar</i> (miniseries, Chile)	
	<b>Fox Premium – 4 titles</b>	
	29. <i>Llámame Bruna</i> (series, Brazil)	
	30. <i>El General Naranjo 2</i> (series, Colombia)	
	31. <i>Sitiados: México 3</i> (series, Mexico)	
	32. <i>Impuros 2</i> (series, Brazil)	
	<b>Amazon Prime – 3 titles</b>	
	33. <i>Diablo Guardián</i> (series, Mexico)	
	34. <i>Instinto</i> (series, Spain)	
	35. <i>El Juego de las Llaves</i> (series, Mexico)	
	<b>DirecTV Go – 3 titles</b>	
	36. <i>La Verdad</i> (series, Spain)	
	37. <i>El Continental</i> (series, Spain)	
	38. <i>Secretos de Estado</i> (series, Spain)	
	<b>HBO Go – 1 title</b>	
	39. <i>Pico da Neblina</i> (series, Brazil)	
<b>Total: 13</b>	<b>Total: 39</b>	<b>Total: 2</b>
<b>GENERAL TOTAL: 54</b>		

Source: Obitel Argentina

Cablevisión Flow (Clarín Group) operates as a content distribution space for the Group's own channels, but fundamentally for pay TV signals, other air channels and exclusive content, whether licensed or originally produced. In 2019 there were at least three significant cases of fiction that premiered on open or pay TV and, the following day, the entire season was available on Flow. This

strategy was adopted in the cases of *Inconveniencia* – released on November 21 by Telefe and available in full on November 22 on that platform –, *El Jardín de Bronce 2* and *Atrapa a un Ladrón*. The webseries, which until last year were confined to the websites of universities, state platforms or YouTube, now also find a distribution space in Flow, which actively began to include in its catalog many web series during 2019; among them: *Tarde Baby*, *Los Mentirosos*, *Barrilete Cósmico*, *Hotel Romanor* and *El Sueño del Pibe*.

**Table 7. VoD premiere fiction in 2019: countries of origin**

Country	Titles	%
<b>NATIONAL (total)</b>	<b>13</b>	<b>24.1</b>
<b>Obitel countries (total)</b>	<b>39</b>	<b>72.2</b>
Argentina	13	24.1
Brazil	9	16.7
Chile	2	3.7
Colombia	6	11.1
Spain	16	29.6
USA (Hispanic production)	0	0.0
Mexico	6	11.1
Peru	0	0.0
Portugal	0	0.0
Uruguay	0	0.0
Venezuela	0	0.0
<b>CO-PRODUCTIONS (total)</b>	<b>2</b>	<b>3.7</b>
National co-productions	1	0.0
Ibero-American co-productions	1	0.0
<b>TOTAL GENERAL</b>	<b>54</b>	<b>100.0</b>

Source: Obitel Argentina

In the VoD platforms observed, the fiction of Obitel countries is imposed, especially Spain, Colombia, Brazil and Mexico, where both Netflix and other global services have maintained for some years an intense policy of local content production. Argentina is lagging behind, once local content generated by international services is scarce. After some experiences since 2018, it was not until February 2020 that Netflix CEO Reed Hastings announced in Buenos

Aires an extensive list of fiction and non-fiction contents to be produced in the country for this platform.

**Table 8. Formats of national and Ibero-American fiction on VoD**

Format	National				Ibero-American			
	Titles	%	C/E	%	Titles	%	C/E	%
Telenovela	0	0	0	0	0	0	0	0
Series	9	64,3	90	73,2	36	90,0	343	95,5
Miniseries	5	35,7	33	26,8	4	10,0	16	4,5
Unitary	0	0	0	0	0	0	0	0
Others	0	0	0	0	0	0	0	0
<b>Total</b>	<b>14</b>	<b>100</b>	<b>123</b>	<b>100</b>	<b>40</b>	<b>100</b>	<b>359</b>	<b>100</b>

\* Regarding the two co-productions, one was considered national, and the other, Ibero-American.

Source: Obitel Argentina

The short formats, series and miniseries concentrate the whole offer. Even in the platforms of the National State, Cine.ar and Cont.ar, it is possible to find exclusive series that were first released online.

#### 4. Fiction analysis: open TV, VoD and transmedia expressions in networks

The most watched show of the year, *Argentina, Tierra de Amor y Venganza*, did not present a novel proposal beyond the usual channels, in which the chapters are available both on their official website and on social networks. A different case was that of *Pequeña Victoria*, which, together with the contact strategy of off-screen repetition, proposed a series of videos linked to the fictional theme, mainly the experience of motherhood for the first time.



These are five to six-minute videos in which Amira Chediak comments on some fragments of the telenovela and their relationship with her experience as a first-time mother. The series is called *24 Días con Mamá* and the description on her YouTube channel reads: “How often do you breastfeed? How do you take the temperature of the water to bathe your child? [...] In her own maternal journey with Rome, she will be sharing experiences for those who are going through motherhood and fatherhood for the first time. On Tuesdays and Thursdays after the episode of *Pequeña Victoria* you will find a premiere episode!”

This documentary series also has an agreed periodicity, which allows identification spaces different from the traditional ones in fiction. And in the commentaries of each episode, similar or different experiences in relation to motherhood are approached, building a sort of anecdotal memory of the arrival of the baby, but there are also comments about the actress who stars in the documentary series.

In addition to this documentary series associated with the telenovela, the channel also offers coverage of the recordings by the millennial actress Micaela Suárez, documenting both her experience as an actress and the backstage of the recordings. The experience of the young actress is thus presented in an “instagramer” language, or, as the website says, “youtuber”, which allows a link with young audience, both because of the actress’s connection with her generational peers and because of the scenes she stars in, involving sexual awakening, gender issues and bonds between peers.

In this way, *Telefe*, through *Pequeña Victoria*, establishes diverse strategies of relationship beyond the screen, which is directed to people who went through maternity and paternity sharing fears, experiences, advice; on the other hand, to young spectators who follow the behind-the-scenes of a novel actress.

What is interesting to note is that these strategies replicate both classic and novel approaches to transmedia linkage. What we could call classic, such as the backstage space, the interview or the

highlighting of scenes, is presented with a novel treatment, incorporating documentary genres and the forms of contact present in other settings, far from the institutional spaces, such as the history of Instagram, or the youtuber's channel (Según Mica), or the advice and experience channel (24 Días con Mamá), which relies on great humor and important post-production to include sequences of the telenovela on the screen as a dialogue balloon, emphasis through graphics, as well as cuts and editing. In this way, non-fictional spaces of playfulness associated with fiction are presented.

## 5. Highlights of the year

As already mentioned, in 2019 the decline in the production of fiction destined to open television continues. Except for the case of *Argentina, Tierra de Amor y Venganza*, serialized fiction does not exceed eighty chapters. In this sense, the amount of programmed fiction time also falls. Additionally, in terms of production quality, there is also a drop in the quality standard. *Argentina, Tierra de Amor y Venganza* not only was the serial fiction produced in Argentina with the largest audience, but it also presents exceptions in the above-mentioned falls: it is a historical fiction, whose plot seeks to reconstruct the process of immigration to Argentina between the 1920s and 1940s. In this case, a production effort was evidenced to which long serialized fictions had become unaccustomed. The historical background proposed by the fiction allowed the revisiting of different events that took place in Argentina throughout the period, while at the same time the conflict and coexistence resulting from the European immigration to the country were staged again. Among other facts, it tells the story of the struggle to escape from the main character's trafficking and prostitution network, but it also accentuates the ways in which the romances of people with different cultures and languages were interwoven and, over time, shaped a new identity.

For its part, *Pequeña Victoria*, from Telefe, worked especially on the coexistence of gender identities and diversities. The

characters “mothered” a baby, Victoria, conceived with surrogacy, and cared for by her legal mother, her other mother (the transvestite sperm donor), her other mother (the surrogate) and one more mother, a character who is a friend of the legal mother. These four women will also have their love stories in parallel to the tasks of caring for and raising the baby. An interesting aspect of the telenovela is the way it portrays not only gender identities, but also the forms of motherhood involved: the professional who decides to be a single mother; the women who have time for parenting; those who can do it in a more distant way; mothers in couples, etc. And from there it opens up to the relationships of motherhood with other areas of social life, such as work, the traditional family, assembled families, leisure, among others. All of them approached the subject of women’s rights in different ways and different searches for rights embodied by feminist militancy. In this sense, *Pequeña Victoria* can be thought of as a series that, without making it explicit, operates as a space for legitimizing those forms, errors, successes, joys and frustrations associated with upbringing and motherhood.

On the other hand, open television premieres include series and miniseries such as *El Tigre Verón* and *Chueco en Línea*, both from El Trece, previously released on Cablevisión Flow. Both are co-produced by the cable television company and El Trece’s associated production company, Pol-ka. This strategy of production in association with platform companies is emphasized, but this year there is also a tendency to reprogram these productions; in previous years the passage was in the opposite direction: fictions that did not produce the expected results on open television moved to VoD spaces. In 2019, El Trece programmed fictions initially produced for VoD platforms. In the case of *El Tigre Verón*, which follows the guidelines of national fictions present in platforms such as Netflix, we can see a violent, corrupt character occupying a leadership position, whose empire is put at risk. In the case of Verón (incarnated by Julio Chávez), he is a guild political leader who is also president of a football club and works in these spaces with his family. It is a

mafia portrait of politics and sports leadership, of their links to organized crime and justice. In this tour, El Tigre will be the center of a cataclysm that will devastate his family and way of life, all without avoiding showing the prison and violent world that these fictions associate with the popular sectors.

For its part, *Chueco en Línea* explores a docu-fiction format, in which Pol-ka's CEO and programming director of El Trece, Adrian Suar (who is also an actor), seeks to position himself as an influencer on social networks, and he does so with the help of his son (also an actor) and some actors who "play themselves". In this format of about 15 minutes, the actors of the production company are shown scenes of clumsiness of the protagonist with social networks, and especially cameos of all the staff of El Trece and of the productions managed by Pol-ka. In this way, not only does El Trece occupy space in its fiction programming, but it is also a fiction that has already been released in other spaces and, above all, co-financed. What El Trece puts on screen favors the production of fictions that focus on the line that characterizes the production company: *cos-tumbrismo* as an aesthetic form both for melodramatic fiction and the light tone of the comedy that structures the narratives.

## **6. Theme of the year: melodrama in times of streaming**

Latin American television networks have historically specialized in the production and exhibition of telenovelas. This genre was established as a form of serial narrative sustained on a matrix that is directly linked to the mode of melodramatic imagination (Brooks, 1995) that colors various aspects of popular and media culture in our continent (Martín-Barbero, 1993; Oroz, 1995). In the 21st century, competitions arise and, in the Argentine case, make melodramatic expressions lose their centrality within the system of television fictions. As can be seen in *Obitel's* previous reports, Argentine open TV channels have sought to recover the audience that migrated to cable or internet platforms during the last decade, moving away from the stylistic variants related to their original matrix.

When Latin American production companies associate with international cable networks or streaming platforms to adjust to the new media system, they are immersed in a process of economic and cultural glocalization (Castells, 1999). This implies a compromise between two trends. On the one hand, there are the narrative guidelines, of production level and thematic selection that demand both the internationalization of production and the globalization of the exhibition. On the other hand, the new series require components recognizable as their own by local cultures that allow them to differentiate themselves within the broad offer generated by the globalization of audiences (Martel, 2010).

Within this process, cultural industries adapt according to their previous productive trajectories and the national cultural traditions in which they are embedded (Lopes, 2004). Thanks to the possibilities generated by partnerships with international companies, they seek to sustain themselves at the local level and expand at the regional level. Within this framework, the new serial narratives are identified by the way the melodramatic imagination, omnipresent in the region, is worked on. This characteristic is fundamental to understanding how each country fits into the new trends and differentiates itself from the others. The Argentine experience is mediated by the conflictive position that melodrama has in its audiovisual culture<sup>9</sup> and the background of working with new formats of the productions made within the framework of the state promotion system that worked between 2011 and 2015. On this basis, stories that appear to be novel and appeal to an audience that consumes serialized narratives are constructed.

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<sup>9</sup> Melodrama was the founding and dominant genre during the period of industrial film production. With the fall of the big studios, it went into decline and was undervalued by both filmmakers and critics. The melodramatic imagination took refuge in the telenovela, but, despite its popularity, it did not regain its prestige. Beyond the contempt, the melodramatic tone is filtered in films and programs that seek to move away from such a discredited genre (Aprea, 2003).

In this context, genre hybridization becomes a recurrent and fundamental operation. The melodramatic imagination is perfectly adapted to the game since it has, from its theatrical origins, the capacity to combine with other genres and to manifest itself through different languages (Brooks, 1995; Gledhill & Williams, 2018; Thomasseau, 1989). In this sense, the support of a melodramatic tone framed in proposals that are classified within other genres is an operation that has been repeated in Argentine audiovisual stories for a long time.

A new wave of biopics produced both in films and series appears as a relevant place to observe the processes of generic hybridization and the persistence of melodramatic imagination within the new serial narrative proposals in Argentina. The film biography is a genre with an extensive presence in the cinema. It recounts the lives of characters of historical significance or social relevance, attributing their success to certain positive traits of their personality (Altman, 2000). In the second decade of the 21st century, biopic manifestations that break some aspects of the classic genre appear. The characters are not recognized by their positive values, but by the opposite ones. They are assassins like the protagonists of *El Clan* (Pablo Trapero, 2015) or *El Ángel* (Luis Ortega, 2018). Others, without cultural prestige, suffer unexpected tragic destinies, like *Gilda: No me Arrepiento de Este Amor* (Lorena Muñoz, 2018) or *El Potro: Lo Mejor del Amor* (Lorena Muñoz, 2018). When we talk about miniseries, biopics that address both the dark aspects of the protagonists and their professional success are produced: *Sandro de América* (Adrián Caetano, 2018) and *Monzón* (Pablo Bossi, 2019). The new works of biographical genre profile their protagonists as heroes with an important melodramatic component. The aesthetics of melodrama allows the construction of characters who are morally ambiguous, but who manage to awaken empathy from their spiritual and physical suffering.

Within this trend, a biopic allows to think about the generic hybridization and the persistence of the melodramatic tone in the

streaming: *Apache: La Vida de Carlos Tevez*. This series, produced and exhibited by Netflix since August 2019, narrates the first years of Tevez's career, a Boca Juniors' player, in eight episodes. It could be the classic story that tells the triumph of a sportsman who overcomes dramatic obstacles. This is a central narrative thread of the story. But it is not the only one. As important as this story is the relationship between the protagonist and the characters of Fuerte Apache, the marginal neighborhood where he arises and from which his nickname – El Apache – comes out, which also gives the series its name.

*Apache* is a story characterized by a multiplicity of plots. We can distinguish two types of characters that are presented in an antithetical way and fulfill opposite destinies as in any melodrama. This shows a Manichean confrontation between two universes. On the one hand, there are those who can get out of the confinement of Fuerte Apache thanks to family love and work, like Carlitos and his parents. In this world ruled by love, good is rewarded. On the other hand, there are those who remain immersed in the marginalization and violence of the neighborhood. Locked up in an environment of uncontrolled passions and violence, they march inexorably towards their fatal destiny.

The Tevez family and the football coaches are presented according to a plausible scenario that appeals to a certain customary family comedy on television. Adriana, the mother, is vigilant, but affectionate. Segundo, the father, is hard-working and protective. The coaches know how to give advice. Carlitos is obedient and respectful of good values, despite the physical marks – his face is burned – and spiritual ones – his biological mother abandoned him and his father was assassinated – that could drive him to the world of marginality.

Those immersed in the violence of Fuerte Apache build their credibility on two series of stories: the *narconovelas* and the stories about marginality that Argentine television and cinema usually build. In both cases, the characters are outlined on the basis of a

melodramatic aesthetic in which they act moved by passions that lead them out of control. They replicate the world of the Tevez family in a negative way: Danilo Sánchez, Carlitos' friend, abandons football and is murdered; Fabiana, the biological mother, cannot control herself as an addict; the father's family only seeks revenge; and Cochi, the drug lord, lives among excesses of drugs, violence and sex. None of them embodies positive values. They present themselves as hyperbole, exaggerating aspects of their personality that lead them to disaster. However, the marginalized ones in a hostile universe maintain bonds of solidarity among some of them. But the emotional ties they establish lock them up more in marginality. Thanks to their ambiguity, the cursed characters establish a kind of pathetic empathy in the face of their pain that positive role models cannot achieve.

Beyond the educational intentions and the search for a realistic view of marginality by following the credibility of the fictions produced by the state promotion – the series was recorded in Fuerte Apache with local extras –, *Apache* achieves its insertion in an international production level as its guidelines are adapted. Only marginality and corruption can be expected from Latin America. Melodramatic imagination appears as a suitable way to present these issues and build attractive series.

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## 2

# BRAZIL: TIME OF BRAZILIAN STREAMING<sup>1</sup>

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## **Introduction**

In 2019, the World Wide Web (www) celebrated its 30th anniversary, However, the internet had not yet asserted itself as a right in the “network society” (Castells, 2009), and its balance points to the expansion of both opportunities and threats.

Another fact that deserves to be highlighted in the year was the drop in the *rating* as a global phenomenon that challenges the television industry. It means change of habits and search for new business models. The integration of platforms and the generation of quality content appear as pillars of the transformation of audiovisual worldwide. And the changes are manifested with a certain degree of

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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.

diversity, according to the economic and cultural characteristics of each society, with disruptive processes.

What we analyzed as a trend in past yearbooks about audiovisual context in Brazil has been increasingly consolidated in 2019 as a mix of production and consumption on multiple platforms. That is adopted in the country mainly by Globo, through a strategy that combines, in its own way, open TV, pay TV and video on demand (VoD), which will be described in this chapter. The audiovisual industry seems to have become more conscious that this is the moment to invest in the transition of consumption habits of Brazilian content, integrating into these habits new formats and new serialities, experimenting with various segments in addition to open TV.

## 1. Brazil's audiovisual context in 2019

### 1.1. Open TV in Brazil

Currently, the Brazilian television system is composed of seven national networks: five private and two public ones. In 2019, only RedeTV! and Band did not produce new national fiction.

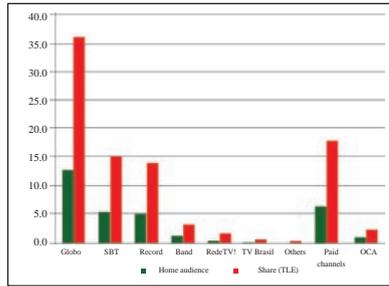
**Chart 1. Open national television broadcasters in Brazil**

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

Source: Obitel Brazil

**Graph 1. TV audience and share by broadcaster in 2019**

Broadcaster	Home audience	Share (TLE)
Globo	12.72	36.01
SBT	5.39	15.27
Record	4.99	14.14
Band	1.17	3.31
RedeTV!	0.56	1.59
TV Brasil	0.27	0.43
Others <sup>2</sup>	0.15	0.43
Paid channels	6.36	18.00
OCA <sup>3</sup>	0.82	2.32
<b>TOTAL</b>	<b>32.43</b>	<b>—</b>



Source: Kantar Ibope Media – 15 Markets

The national home TV audience in the 24-hour range fell 2.04 points compared to 2018, from 34.47 to 32.43. Globo remains the leader, even with a loss of 0.57 points (from 13.29 to 12.72). SBT, Record and Band are in the sequence, repeating the same positions as the previous year. The other open channels (OCA) lost points, while, on the other hand, RedeTV!, TV Brasil and others had a small increase.

Pay TV also decreased by 0.41 audience points compared to 2018 (from 6.77 to 6.36). Despite this, the set of its channels maintains the second audience position. It is not possible to compare this index to that of open channels, since it refers to the sum of the audiences of all pay TV channels.

Regarding the home *share* of televisions connected to TV channels (TLE), we observed a 1.61% drop in Globo's audience over the 2018 TLE (from 37.62% to 36.01%), a decrease of 1.14% from paid channels (from 19.14% to 18%), and a decrease of 2.23% for other open channels (OCA), which went from 4.55% to 2.32%. The other broadcasters remained stable – their fluctuations in the TLE for more or less do not reach half a point.

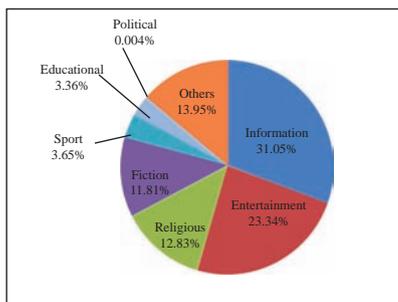
<sup>2</sup> Others: data from Record News, TV Câmara, TV Justiça and TV Senado.

<sup>3</sup> OCA: Other Open Channels: open broadcasters that do not have an individually published audience.

In relation to media penetration<sup>4</sup>, the audience in the year fell by 2.97% for magazines, 2.95% for radio, 2% for newspapers, 1.91% for pay TV and 1.65% for movie theaters. However, there was an increase of 3.46% for internet, which surpassed open TV. Extensive media (+0.05%) and open TV (-0.08%) remained stable, with small fluctuations. The internet is currently the medium with the largest audience, with 86.12%, followed by open TV, with 86.08%, and extensive media, with 82.52%. It is followed, in order, by radio (58.50%), pay TV (37.50%), cinema (14.83%), newspapers (11.96%) and magazines (9.83).

**Graph 2. Genres and times broadcasted on TV programming** <sup>5</sup>

Broadcasted genres	Screen time	%
Information	32850.73	31.05
Entertainment	24702.00	23.34
Religious	13575.95	12.83
Fiction	12493.35	11.81
Sport	3861.03	3.65
Educational	3559.20	3.36
Political	4.30	0.004
Others	14764.05	13.95
Total	105810.6	100



Source: Kantar Ibope Media – 15 Markets

Information and entertainment increased by 1.35% and 1.54%, respectively, and continued to be the most broadcasted genres on

<sup>4</sup> Media penetration rate from 2018 to 2019: open TV, 86.16% to 86.08%; extensive media, 82.47% to 82.52%; internet, 82.66% to 86.12%; radio, 61.45% to 58.80%; pay TV, 39.41% to 37.50%; newspapers, 13.96% to 11.96%; movie theaters, 16.48% to 14.83%; and magazines, 12.8% to 9.83%. The internet remains the medium of greatest rise. Source: Target Group Index BR TG 2019 II.

<sup>5</sup> Genres: information: debate, documentary, interview, journalism, reporting; entertainment: auditorium, cars and engines, culinary, female, game show, comedy shows, children's, fashion and beauty, musical, awards, reality show, concert; sport: sport, football; fiction: film, miniseries, telenovela, series; others: not listed, rural, health, raffle, tele-sales, travel and tourism; educational; political; religious.

open TV. Together, they account for 54.39% of all programming. Fiction, which occupied the third place until 2018, fell from 13.6% to 11.81%, moving to the fourth position. The religious genre is now in the third place, due to a growth of 2.83% (from 10% to 12.83%). The biggest fall of the year occurred in the category of others, which went from 20% to 13.95 – a decrease of 6.05%. Sports fell by 0.75% (4.4% to 3.65%). And educational content had an increase of 3.16% (from 0.2% to 3.36%). Political content now appears in the last position.

## 1.2. Pay TV

In 2019, pay TV lost approximately 10% of its subscribers<sup>6</sup>, being the fifth consecutive year of reductions. In the previous year, the decrease was of 3%. If in 2018 there were 17.5 million subscribers, with a loss of 550 thousand, in December 2019 that number dropped to 15.78 million, with a loss of 1.72 million subscribers. The reasons for such a significant drop according to previous Obitel studies are: competition with access services to OTT content that do not depend on schedules and are still cheaper; the implementation of digital TV, which offers better quality of sound and image to open TV channels, previously only accessible by subscription in certain locations; the fall in the purchasing power of the Brazilian population; and content piracy via equipment easily found in the formal and informal market. Thus, after a significant historical series of growth, Brazilian pay TV closes 2019 (15.78 million) with fewer subscribers than it had in 2012.

### *Fiction on pay TV*

In 2019, 13 paid channels showed Brazilian television fiction, one less than in the previous year. Four of them are national and nine are international (there were ten in 2018). There was a small

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<sup>6</sup> <http://bit.ly/2x4tgjW>

increase in the number of premiere fictions – from 24 to 26. These were mostly of drama, police and criminal genres, two biographical themes, in addition to some fictions that addressed existential issues, such as life, death, ethics, marriage and interpersonal relationships. We highlight *Pico da Neblina*, about the legalization of marijuana, and *Santos Dumont*, about the “father of aviation”, both from HBO. Among comedies, we mention *Porta dos Fundos*<sup>7</sup> with the production *Homens?* for Comedy Central, which after the premiere went to the channel’s on-demand platform and then moved on to Prime Video catalog, a streaming service. We also mention the series of horror genre *Liberto*, from the national channel Prime Box Brasil, with exorcisms and possessions; and the docudrama *Em Nome da Justiça* (AXN), with dramatizations about cases of people punished for crimes they did not commit.

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

Advertising investments in the media increased by 7% over the previous year. In 2019, R\$ 160 billion were invested, while 2018 closed with R\$ 148 billion in investments.

There is no big news either on the distribution of advertisers. The commerce sector leads with R\$ 15 billion in investment. The financial and insurance sector exchanges places with personal hygiene and beauty, taking the second position, and the latter falls to third. In fourth and fifth places are consumer services and pharmaceuticals. Public and social administration remains in sixth position.

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

In 2019, Globo invested in new actions and different commercial formats in its plots, easing rules regarding the involvement of fictional characters and advertising brands. The highlight was the telenovela *A Dona do Pedaço*, in which, in addition to the conti-

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<sup>7</sup> *Porta dos Fundos* is an independent video producer company that has the sixth largest Brazilian channel on YouTube.

nunity of the “House of Novela” (Casa de Novela) project<sup>8</sup>, it drew attention for its new types of merchandising, expanding the inclusion of advertising actions beyond the narrative scope. There was a character which was a digital influencer, and she made advertising campaigns both on Instagram (with 2.5 million followers) and in the commercial breaks of the channel.

In relation to social merchandising, the telenovela *Órfãos da Terra* (Globo, 2019), aired at 6 pm, addressed the issue of refuge and forced diasporas. Aired at a time when the topic gained prominence due to the Syrian war and the worsening of Venezuela’s socio-economic and political crisis, this telenovela conveyed a message in favor of human rights and recognition of full citizenship of refugees and migrants (Néia and Santos, 2020).

The unitary *Juntos a Magia Acontece* (Globo, 2019), which was the first fiction to present only black actors as protagonists, mixed an anti-racist message with an unprecedented commercial action made by a soda brand. The plot brought together merchandising and social merchandising and pointed out possible ways for open channels in the face of reduced revenues.

## 1.5. Communication policies

Amendments to Law n. 12,485/2011 gained relevance in the Brazilian legislature. Bill n. 3,832/2019, pending in the Senate, changes the legal framework for pay TV and includes, among other things, the elimination of impediments to cross ownership in content distribution and production companies. The approval of these changes will impact on the interests of companies such as Globo, Claro and Oi.<sup>9</sup>

The year was also marked by discussions on the regulation of VoD in the country. The Senate Bill n. 57/2018, regarding on-de-

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<sup>8</sup> Partnership between the broadcaster and a furniture retail chain that offered the possibility of buying furniture and items showed in the story.

<sup>9</sup> <http://bit.ly/39UipX9>

mand audiovisual communication, seeks to make companies such as Netflix, Amazon and Hulu become subject to the same obligations as Brazilian brands. The proposal also provides for prioritizing national titles in the search and selection instruments of these suppliers, with a minimum percentage of display and visual prominence on the screen.

The Brazilian audiovisual sector has faced instabilities, cuts and uncertainties due to the federal policy of discredit of the sector. The National Cinema Agency (Ancine), the main source of financing for films for the public sector, in addition to facing a threat of extinction or change of headquarters, froze all its incentive programs. The interruption in the process of releasing resources prevents new projects and productions that were already underway.<sup>10</sup> The federal government vetoed productions with themes related to gender and sexuality diversity, among others, and the intention is to closely monitor the agency and the films produced to impose “controls” – an euphemism for censorship.

## **1.6. Digital and mobile connectivity infrastructure**

Brazil continues occupying the fourth place (after China, India and USA) in the world ranking in number of internet users<sup>11</sup>, with more than 149 million people connected. The cellphone is still the principal dispositive used for connection. The messaging apps WhatsApp and Messenger were the most used in 2019, followed by the social networks Facebook, Instagram, and Twitter. Other accesses were made to watch videos or listen to music on the internet, send e-mails, read the news online and, lastly, look for products and services.<sup>12</sup>

According to the Brazilian Association of Telecommunications Infrastructure (Abrintel) and the Brazilian Association of Informa-

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<sup>10</sup> <http://bit.ly/34s6zSP>

<sup>11</sup> Source: Digital Report 2019, We Are Social, Hootsuite. <http://bit.ly/34kYuPO>

<sup>12</sup> <http://bit.ly/2UTWCu9>

tion and Communication Technology Companies (Brascom), 5G technology is expected to operate commercially in Brazil from 2021 on. For this, there is a need to significantly expand the number of antennas throughout the national territory, which includes coverage of remote and rural regions.

### 1.7. Independent producers

Ancine accounts for 8,719 independent producers<sup>13</sup>, an increase of 3% compared to the previous year. In 2019, 28 production companies became involved in the realization of 65% (31) of the national television fiction titles that premiered on open TV. On pay TV, 96% (25) of premiere Brazilian fictions mobilized 23 independent producers, while on VoD 87% (20) of national productions measured by Obitel monitoring counted with the participation of 17 producers.

Considering the general universe of Brazilian television fiction in 2019 – that is, the sum of the national totals of open TV, pay TV and VoD, excluding the repetition of titles that appeared in more than one of these sectors –, we have a total of 84 productions. Of these, 77% (65) had the participation of 51 independent producers – a number 12% higher when compared to the 45 producers active in the area in 2018.

Once again O2 Filmes tops the list with the highest number of television fictions made in the year, with six titles. Casablanca, which made four fictions in co-production with Record, is in second place. Boutique Filmes, Gullane and Mixer share the third place, with three productions each. Conspiracy Films, which in 2018 shared the first place with O2, appears in fourth place, alongside Fábrica, Giros Filmes and Losbragas – each one responsible for two fictions.

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<sup>13</sup> Consultation made to Ancine through digital support in January 2020.

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

**Table 1. Fiction broadcasted in 2019 (national and imported; premieres and reruns; co-productions)**

<p><b>PREMIERE NATIONAL TITLES – 48</b></p> <p><b>Globo – 26 national titles</b></p> <ol style="list-style-type: none"> <li>1. <i>10 Segundos para Vencer</i> (miniseries)</li> <li>2. <i>A Dona do Pedaço</i> (telenovela)</li> <li>3. <i>A Presepada</i> (telefilm – VoD premiere)</li> <li>4. <i>Amor de Mãe</i> (telenovela)</li> <li>5. <i>Aruanas</i> (publicity episode – VoD premiere)</li> <li>6. <i>Assédio</i> (miniseries – VoD premiere)</li> <li>7. <i>Bom Sucesso</i> (telenovela)</li> <li>8. <i>Carcereiros</i> (series – VoD premiere) – 2nd season</li> <li>9. <i>Cine Holliúdy</i> (series – VoD premiere)</li> <li>10. <i>Elis – Viver é Melhor que Sonhar</i> (docudrama)</li> <li>11. <i>Éramos Seis</i> (telenovela – partial VoD premiere)</li> <li>12. <i>Espelho da Vida</i> (telenovela)</li> <li>13. <i>Filhos da Pátria</i> (series – VoD premiere) – 2nd season</li> <li>14. <i>Hebe</i> (publicity episodes – VoD premiere)</li> <li>15. <i>Juntos a Magia Acontece</i> (unitary)</li> <li>16. <i>Malhação – Toda Forma de Amar</i> (soap opera – partial VoD premiere) – 27th season</li> <li>17. <i>Malhação – Vidas Brasileiras</i> (soap opera) – 26th season</li> <li>18. <i>O Sétimo Guardião</i> (telenovela)</li> <li>19. <i>O Tempo Não Para</i> (telenovela)</li> <li>20. <i>Órfãos da Terra</i> (telenovela – partial VoD premiere)</li> <li>21. <i>Se Eu Fechar os Olhos Agora</i> (miniseries – VoD premiere)</li> <li>22. <i>Segunda Chamada</i> (series – VoD premiere)</li> <li>23. <i>Shippados</i> (publicity episode – VoD premiere)</li> <li>24. <i>Sob Pressão</i> (series – VoD partial premiere) – 3rd season</li> <li>25. <i>Treze Dias Longe do Sol – O Filme</i> (telefilm)</li> </ol>	<p><b>SBT – 3 national titles</b></p> <ol style="list-style-type: none"> <li>46. <i>A Garota da Moto</i> (series) – 2nd season</li> <li>47. <i>A Garota da Moto – O Filme</i> (telefilm)</li> <li>48. <i>As Aventuras de Poliana</i> (telenovela)</li> </ol> <p><b>CO-PRODUCTIONS – 0</b></p> <p><b>PREMIERE IMPORTED TITLES – 4</b></p> <p><b>SBT – 3 imported titles</b></p> <ol style="list-style-type: none"> <li>1. <i>A Que Não Podia Amar</i> (telenovela – Mexico)</li> <li>2. <i>A Rosa dos Milagres</i> (series – Mexico)</li> <li>3. <i>Milagres de Nossa Senhora</i> (series – Mexico)</li> </ol> <p><b>Band – 1 imported title</b></p> <ol style="list-style-type: none"> <li>4. <i>Ouro Verde</i> (telenovela – Portugal)</li> </ol> <p><b>RERUNS – 19</b></p> <p><b>SBT – 7 reruns</b></p> <ol style="list-style-type: none"> <li>1. <i>A Dona</i> (telenovela – Mexico)</li> <li>2. <i>Abismo de Paixão</i> (telenovela – Mexico)</li> <li>3. <i>Carrossel</i> (telenovela)</li> <li>4. <i>Chiquititas</i> (telenovela)</li> <li>5. <i>Cúmplices de um Resgate</i> (telenovela)</li> <li>6. <i>Meu Coração é Teu</i> (telenovela – Mexico)</li> <li>7. <i>Teresa</i> (telenovela – Mexico)</li> </ol> <p><b>Record – 6 reruns</b></p> <ol style="list-style-type: none"> <li>8. <i>A Escrava Isaura</i> (telenovela)</li> <li>9. <i>A Terra Prometida</i> (telenovela)</li> <li>10. <i>Bela, a Feia</i> (telenovela)</li> <li>11. <i>Caminhos do Coração</i> (telenovela)</li> <li>12. <i>Essas Mulheres</i> (telenovela)</li> <li>13. <i>O Rico e Lázaro</i> (telenovela)</li> </ol> <p><b>Globo – 5 reruns</b></p> <ol style="list-style-type: none"> <li>14. <i>A Grande Família</i> (series)</li> </ol>
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<p>26. <i>Verão 90</i> (telenovela)</p> <p><b>TV Cultura – 9 national titles</b></p> <p>27. <i>Árvore dos Araújos</i> (series)</p> <p>28. <i>Baile de Máscaras</i> (series)</p> <p>29. <i>Crisálida</i> (series)</p> <p>30. <i>Guateka</i> (series)</p> <p>31. <i>Insustentáveis</i> (series)</p> <p>32. <i>Lana &amp; Carol</i> (series)</p> <p>33. <i>Sou Amor</i> (series)</p> <p>34. <i>Squat na Amazônia</i> (series)</p> <p>35. <i>Super Família</i> (series)</p> <p><b>Record – 6 national titles</b></p> <p>36. <i>Amor Sem Igual</i> (telenovela)</p> <p>37. <i>Jesus</i> (telenovela)</p> <p>38. <i>Jezabel</i> (telenovela)</p> <p>39. <i>O Figurante</i> (unitary)</p> <p>40. <i>Terroros Urbanos</i> (series – VoD premiere)</p> <p>41. <i>Topíssima</i> (telenovela)</p> <p><b>TV Brasil – 4 national titles</b></p> <p>42. <i>Contracapa</i> (series)</p> <p>43. <i>Diário de Luli</i> (series)</p> <p>44. <i>O Pantanal e Outros Bichos</i> (series)</p> <p>45. <i>República do Peru</i> (series) – 2nd season</p>	<p>15. <i>Avenida Brasil</i> (telenovela)</p> <p>16. <i>Belíssima</i> (telenovela)</p> <p>17. <i>Cordel Encantado</i> (telenovela)</p> <p>18. <i>Por Amor</i> (telenovela)</p> <p><b>Band – 1 rerun</b></p> <p>19. <i>Senhor dos Céus</i> (series – USA/Mexico/Colombia)</p> <p><b>TOTAL PREMIERE TITLES: 52</b></p> <p><b>TOTAL RERUNS: 19</b></p> <p><b>TOTAL BROADCASTED TITLES: 71</b></p>
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Source: Obitel Brazil

In 2019, Brazil had a 6.7% increase in the number of premiere national titles compared to the previous year: 48 fictions against 45 shown in 2018. The fluctuations in the number of premiere national fictions since 2017 are mainly due to the exhibition, by TV Cultura and TV Brasil, of works produced through the Prodav<sup>14</sup> Public TV edicts, responsible for promoting the audiovisual production of regional content available to all broadcasters in the public field. And both channels can broadcast those works on national network.

The private channels remained relatively stable in the production of titles: Globo and Record presented just one more premiere

<sup>14</sup> Acronym for Support Program for the Development of Brazilian Audiovisual.

national fiction than in the previous year, while SBT maintained the offer of three titles. The numbers of imported productions and re-runs also did not change – we just highlight the absence of premiere co-productions. In the previous year, this category had one title. Under the administration of the new federal government management, TV Brasil had a reduction in the supply of television fiction in 2019: four against 10 in 2018. In this way, TV Cultura, linked to the government of the State of São Paulo, became the main national window for displaying independent content: if in 2018 the broadcaster aired only two premiere titles, in 2019 that number rose to nine.

We highlight the diversity observed in the dialogue between open TV and VoD regarding the distribution of television content: 11 fictions – 23% of the total national and original titles – elected streaming platforms as the first display window; three of them had only a few episodes shown via broadcasting, being made available in full just on VoD. We emphasize, once again, Globo's action strategy on multiple platforms, by integrating open TV, pay TV and VoD. Thus, four titles from the broadcaster sometimes favored open TV, sometimes Globoplay as the first window during their exhibitions – among them, *Órfãos da Terra*, the first premiere national telenovela to have most of its chapters (148 of 154) offered primarily in the digital environment.

**Table 2. Premiere fiction in 2019: countries of origin**

Country	Titles	%	Chapters/ episodes	%	Hours	%
<b>NATIONAL (total)</b>	<b>48</b>	<b>92.3</b>	<b>2073</b>	<b>84.9</b>	<b>1307:25</b>	<b>85.3</b>
<b>OBITEL COUNTRIES (total)</b>	<b>4</b>	<b>7.7</b>	<b>370</b>	<b>15.1</b>	<b>225:35</b>	<b>14.7</b>
Argentina	0	0.0	0	0.0	0:00	0.0
<b>Brazil</b>	<b>48</b>	<b>92.3</b>	<b>2073</b>	<b>84.9</b>	<b>1307:25</b>	<b>85.3</b>
Chile	0	0.0	0	0.0	0:00	0.0
Colombia	0	0.0	0	0.0	0:00	0.0
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)	0	0.0	0	0.0	0:00	0.0
Mexico	3	5.8	224	9.1	146:56	9.6
Peru	0	0.0	0	0.0	0:00	0.0
Portugal	1	1.9	146	6.0	78:39	5.1

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>0</b>	<b>0.0</b>	<b>0</b>	<b>0.0</b>	<b>0:00</b>	<b>0.0</b>
Brazilian co-productions	0	0.0	0	0.0	0:00	0.0
Co-productions between Obitel countries	0	0.0	0	0.0	0:00	0.0
<b>TOTAL</b>	<b>52</b>	<b>100.0</b>	<b>2443</b>	<b>100.0</b>	<b>1533:00</b>	<b>100.0</b>

Source: Obitel Brazil

The number of chapters/episodes of national productions increased about 4% compared to the previous year. The number of hours, however, only increased by 0.6% compared to 2018, which leads us to infer, given the greater offer in the number of fictions, that there was a decrease in the duration of the chapters/episodes.

The four Ibero-American titles – the same amount as last year – also followed this trend: there was a substantial increase of 34% in the offer of chapters/episodes, but the number of hours registered a decrease of 4%, which led the total number of hours to a 3% downward fluctuation. Highlight for the importation of a fiction from Portugal, the telenovela *Ouro Verde*, aired by Band in the time slot in which the broadcaster had been showing Turkish productions since 2015.

For the third consecutive year, the series offer was greater than that of telenovelas. In 2019, short serial formats (series, miniseries and a docudrama shown in chapters) corresponded to 50% of the total of premiere national fictions shown on open TV. Since 2015 there was no such diversification in the formats of Brazilian productions: as in that year, all categories of format in the table were covered.

Unlike 2018, when the offer of Ibero-American titles was limited to telenovelas, in 2019 series were also imported – the Mexican production *La Rosa de Guadalupe* (Televisa), shown by SBT in two seasons with different names (*A Rosa dos Milagres* and *Milagres de Nossa Senhora*). In addition, the two telenovelas aired that year presented a total of 10% more chapters/episodes than the four productions of the same format shown in the previous year.

**Table 3. Formats of national and Ibero-American fiction**

Format	National				Ibero-American				
	Titles	%	C/E	%	H	%	C/E	%	H
Telenovela	14	29.2	1514	73.0	1045:35	80.0	303	81.9	180:56
Series	20	41.6	263	12.7	119:50	9.1	67	18.1	44:39
Miniseries	3	6.3	24	1.2	15:13	1.2	0	0.0	0:00
Telefilm	3	6.3	3	0.1	4:16	0.3	0	0.0	0:00
Unitary	2	4.2	2	0.1	1:27	0.1	0	0.0	0:00
Docudrama	1	2.1	4	0.2	2:26	0.2	0	0.0	0:00
Others (soap opera, etc.)	5	10.3	263	12.7	118:38	9.1	0	0.0	0:00
<b>Total</b>	<b>48</b>	<b>100.0</b>	<b>2073</b>	<b>100.0</b>	<b>1307:25</b>	<b>100.0</b>	<b>370</b>	<b>100.0</b>	<b>225:35</b>

Source: Obitel Brazil

**Table 4. The ten most watched titles**

	Title	Country of the original idea/ script	Channel	Format/ genre	N. of chap./ ep. (in 2019)	Time slot	Rating	Share
1	<i>A Dona do Pedaço</i>	Brazil	Globo	Telenovela/drama	161	Prime time	34.1	50.9
2	<i>O Sétimo Guardião</i>	Brazil	Globo	Telenovela/fantastic drama	118	Prime time	28.1	43.0
3	<i>Bom Sucesso</i>	Brazil	Globo	Telenovela/romance	134	Prime time	27.8	44.5
4	<i>Amor de Mãe</i>	Brazil	Globo	Telenovela/drama	32	Prime time	26.4	43.7
5	<i>Verão 90</i>	Brazil	Globo	Telenovela/romantic comedy	154	Prime time	25.6	40.1
6	<i>O Tempo Não Para</i>	Brazil	Globo	Telenovela/romantic comedy	24	Prime time	22.4	38.8
7	<i>Órfãos da Terra</i>	Brazil	Globo	Telenovela/drama	154	Evening	21.7	36.2
8	<i>Cine Holliúdy</i>	Brazil	Globo	Series/comedy	10	Prime time	21.2	35.5
9	<i>Éramos Seis</i>	Brazil	Globo	Telenovela/drama	79	Evening	20.4	37.1
10	<i>Sob Pressão</i>	Brazil	Globo	Series/drama	14	Prime time	20.3	35.7
<b>Total productions: 10</b>					<b>Foreign scripts: 0</b>			
100%					0%			

Source: Kantar Ibope Media – 15 Markets – Orbitel Brazil

Despite the quantitative predominance of the series in national production in 2019, the telenovela format occupied the first seven positions in the top ten of open TV – a situation not observed at least since 2011, when the six most watched titles were also telenovelas. Also noteworthy is the return of a comedy series (*Cine Holliúdy*) to the ranking – which was not seen since 2014.

In comparison with data from previous years, the audience indexes retracted, returning to levels like those of 2016, when telenovelas aired at 6 pm and 7 pm gave more audience than titles shown

at 9 pm. As in 2015 – when Globo’s fictions aired in high prime time competed against *Os Dez Mandamentos* (Record) –, only one title registered an index higher than 30 points (in 2018, there were four). It is the first time that titles with an average of approximately 20 points (in the case of *Éramos Seis* and *Sob Pressão*) are in the top ten – until then, the title with the lowest audience on the list had been *Além do Tempo* (Globo, 2015), with 21.9 points. The share numbers of the last four placed in the ranking, in turn, are the lowest of the ten most viewed titles in the entire *Obitel* historical series.

**Table 5. Audience profile of the ten most watched titles:  
gender, age, socioeconomic level**

	Title	Channel	Gender %		Socioeconomic level %		
			Women	Men	AB	C	DE
1	<i>A Dona do Pedaço</i>	Globo	61.8	38.2	29.3	49.8	20.9
2	<i>O Sétimo Guardião</i>	Globo	61.2	38.8	29.6	49.4	21.0
3	<i>Bom Sucesso</i>	Globo	65.1	34.9	27.9	50.0	22.1
4	<i>Amor de Mãe</i>	Globo	62.7	37.3	28.9	49.2	21.9
5	<i>Verão 90</i>	Globo	64.3	35.7	27.9	50.0	22.0
6	<i>O Tempo Não Para</i>	Globo	65.1	34.9	29.2	47.7	22.9
7	<i>Órfãos da Terra</i>	Globo	65.9	34.1	28.3	49.8	21.8
8	<i>Cine Holliúdy</i>	Globo	59.8	40.2	28.0	49.8	22.2
9	<i>Éramos Seis</i>	Globo	66.8	33.2	27.8	49.7	22.5
10	<i>Sob Pressão</i>	Globo	62.2	37.8	29.8	49.9	20.3

	Title	Channel	Age group %					
			4-11	12-17	18-24	25-34	35-49	50+
1	<i>A Dona do Pedaço</i>	Globo	5.3	4.8	7.1	13.1	24.8	44.9
2	<i>O Sétimo Guardião</i>	Globo	4.5	4.3	6.8	12.4	24.6	47.5
3	<i>Bom Sucesso</i>	Globo	5.8	5.1	6.7	12.0	23.2	47.1
4	<i>Amor de Mãe</i>	Globo	5.3	4.9	6.8	12.2	24.1	46.7
5	<i>Verão 90</i>	Globo	5.4	4.9	6.9	11.9	23.5	47.3
6	<i>O Tempo Não Para</i>	Globo	4.7	4.7	6.8	11.0	22.4	50.4
7	<i>Órfãos da Terra</i>	Globo	5.4	4.9	7.0	11.9	22.8	48.0
8	<i>Cine Holliúdy</i>	Globo	5.5	5.4	8.1	14.7	26.0	40.3
9	<i>Éramos Seis</i>	Globo	5.5	5.2	7.1	11.5	22.5	48.2
10	<i>Sob Pressão</i>	Globo	5.4	5.8	8.4	15.1	26.6	38.6

Source: Kantar Ibope Media – 15 Markets

The favorite fictions between the male audience continue to be the telenovelas of the high prime time and the series that are

part of the so-called “first line of shows” aired by Globo, aired after the fictions of 9 pm – in this case, *Cine Holliúdy* and *Sob Pressão*. These two productions recorded the highest concentrations of adolescent, young and adult viewers (12 to 49 years old). *Bom Sucesso* and *Verão 90* (telenovelas aired at 7 pm), had half of their audience composed of class C, while *O Tempo Não Para* (7 pm), *Órfãos da Terra* and *Éramos Seis* (both aired at 6 pm) concentrated the highest percentages of the audience above 50 years old. All 7 pm telenovelas had the highest percentages of class D and E viewers.

### 3. VoD monitoring

In this second year of Obitel VoD monitoring, the objective remains: to recognize new networks, windows and connections for service distribution in the country, despite the typical opacity and invisibility of the new environment. We have witnessed a complete renewal of television business models, which reverberates in the production and distribution of television fiction in terms of both formats/content and business models. Representatives of independent channels and producers stress that the ways we consume content have broken the rules that previously defined whether the product was made for open TV, pay TV, VoD or cinema. In this sense, it is impossible not to refer to the changes in “technicalities” (Martín-Barbero, 2003) to account for this dynamic of the media that has provided new technical, perceptual and aesthetic operations.

#### 3.1. VoD in Brazil

In the last five years, video consumption on the internet has grown six times more than on TV. While the box office of movie theaters for eight years has been falling and the percentage of pay TV users, since 2015, has been gradually shrinking, the VoD audience has increased by 165%.<sup>15</sup> The consolidation of streaming tech-

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<sup>15</sup> <http://glo.bo/2xheJBp>

nology in 2019 was marked by the expansion of platforms such as Globoplay, Prime Video and HBO Go and by the emergence of new platforms, mainly independent ones, linked to the telecommunications sector, with emphasis on Apple TV+, launched in Brazil in November.

**Chart 2. VoD in Brazil<sup>16</sup>**

Platforms		Total
<b>VoD linked to open TV networks</b>	Globoplay (Globo), SBT Vídeos (SBT), PlayPlus (Record), EBC Play (TV Brasil), Sara Play (TV Gêneseis)	5
<b>VoD linked to pay TV networks</b>	AXN Play, +Bis, A&E Play, Canal Sony, Cinemax Go, Cartoon Network Go, Esporte Interativo Plus, FishTV, Fox Play, Globosat Play, Premiere Play, Multishow Play, Sport TV Play, HBO Go, Netmovies, NET Now, Planet Kids, History Play, Sky Online, Space Go, Telecine On, TNT Go, WatchESPN, A&E Brasil (YouTube), Sexy Hot Play, LifeTime (YouTube), CineBrasil Já, Combate Play, Discovery KidsOn, Nickelodeon Play, Noggin, Tamanduá TV, Max Go, Canal Brasil (YouTube), Arte1 Play, BetPlay, Box Brazil Play, Cennarium, WatchESPN, Fox Sports, Comedy Central Brasil	41
<b>VoD linked to telecommunication companies</b>	Claro Video, iTunesStore, Oi Play, Vivo Play, VID+, Brisa Play, NET Now (Claro)	7
<b>VoD without links to TV networks</b>	Afroflixx, Prime Video, Babidiboo.tv, Crackle, CrunchyRoll, EnterPlay, Google Play, Libreflixx, Looke, Microsoft Movies & TV, Mubi, MyFrenchFilm Festival, NBA TV, Netflix, Oldflixx, Philostv, ScapCine, SmartVOD, Sony Video Unlimited, Univer, Vevo, Videocamp, Vimeo, Xbox Video, YouTube, O2 Play, SOT TV, Dazn, Esporte Interativo Plus, Petra Belas Artes, Apple TV+, Box Brazil Play	32
<b>TOTAL</b>		<b>85</b>

Source: Obitel Brazil

In addition to the increased competitiveness in the VoD sector, the number of mobile device users who started using the service

<sup>16</sup>This chart shows a survey of the new VoD service distribution networks, windows and connections in Brazil.

grew by 44%<sup>17</sup>, making VoD the segment with the greatest growth horizon, both in terms of offer-consumption of audiovisual contents (films, series, telenovelas), as well as regarding the local production (fostering the audiovisual industry).

### 3.2. VoD systems market

Netflix remains being the leader in the streaming industry, with ten million subscribers, despite intensified competition due to the growth of Globoplay, Prime Video, YouTube Premium and Apple TV+. The latter, a newcomer, associates its VoD service with Apple's technological devices and has so far invested US\$ 6 billion in producing exclusive content.<sup>18</sup> Now, we need to keep track to observe whether this trend will continue with the arrival of Disney Plus platform in Brazil, scheduled for 2020.

### 3.3. VoD analysis in 2019: national and Ibero-American premiere fiction

In 2019, the number of original Brazilian fictions in VoD surpassed that of the previous year, with 23 titles, against 20 in 2018. Netflix presented eight original Brazilian productions, one more than the previous year. Globoplay registered a big growth, from six to 11 titles, not only indicating its strong productive and competitive capacity, but also denoting that its local productions are an asset in the dispute with international giants. Among the Brazilian fictions in VoD, we highlight two series: *Aruanas* (Globoplay, 2019), first of the platform with world premiere and that addresses the theme of illegal mining in the Amazon; and the third season of *3%* (Netflix, 2019), which also won viewers abroad. There were also three biographical miniseries: *Hebe* and *Elis* (Globoplay), and *Mauá – O Primeiro Gigante* (History Channel).

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<sup>17</sup> <http://bit.ly/34kX2Nm>

<sup>18</sup> <http://bit.ly/2XjNMrf>

**Table 6. National and Ibero-American fiction broadcasted on VoD in 2019**

Premiere national titles on VoD	Premiere imported titles from Obitel countries on VoD	Premiere co-productions from Obitel countries on VoD
<p><b>Globoplay – 11 titles</b></p> <ol style="list-style-type: none"> <li>1. <i>Shippados</i> (series)</li> <li>2. <i>Aruanas</i> (series)</li> <li>3. <i>Sessão de Terapia</i> (series) – 4th season</li> <li>4. <i>Me Chama de Bruna</i> (series)</li> <li>5. <i>Um Contra Todos</i> (series) – 4th season</li> <li>6. <i>Eu, a Vó e a Boi</i> (series)</li> <li>7. <i>Impuros</i> (series) – 2nd season</li> <li>8. <i>Hebe</i> (miniseries)</li> <li>9. <i>Elis</i> (miniseries)</li> <li>10. <i>Filhos da Pátria</i> (series)</li> <li>11. <i>Segunda Chamada</i> (series)</li> </ol> <p><b>Netflix – 8 titles</b></p> <ol style="list-style-type: none"> <li>1. <i>3%</i> (series) – 3rd season</li> <li>2. <i>Coisa Mais Linda</i> (series)</li> <li>3. <i>Samantha!</i> (series) – 2nd season</li> <li>4. <i>O Mecanismo</i> (series) – 2nd season</li> <li>5. <i>Irmadade</i> (series)</li> <li>6. <i>Ninguém Tá Olhando</i> (series)</li> <li>7. <i>O Escolhido</i> (series)</li> <li>8. <i>Sintonia</i> (series)</li> </ol> <p><b>Multishow Play – 2 titles</b></p> <ol style="list-style-type: none"> <li>1. <i>Os Suburbanos</i> (series) – 4th season</li> <li>2. <i>O Dono do Lar</i> (series)</li> </ol> <p><b>History Channel – 1 title</b></p> <ol style="list-style-type: none"> <li>1. <i>Mauá – O Primeiro Gigante</i> (miniseries)</li> </ol> <p><b>Canal Brasil – 1 title</b></p> <ol style="list-style-type: none"> <li>1. <i>Toda Forma de Amor</i> (series)</li> </ol>	<p><b>Netflix – 19 titles</b></p> <ol style="list-style-type: none"> <li>1. <i>La Casa de Papel</i> (series, Spain) - 3rd season</li> <li>2. <i>Siempre Bruja</i> (series, Colombia)</li> <li>3. <i>Las Chicas del Cable</i> (series, Spain) – 4th season</li> <li>4. <i>Apache: A Vida de Carlos Tevez</i> (series, Argentina)</li> <li>5. <i>Alta Mar</i> (series, Spain)</li> <li>6. <i>Alta Mar</i> (series, Spain) – 2nd season</li> <li>7. <i>Criminal: Spain</i> (series, Spain)</li> <li>8. <i>El Club</i> (series, Mexico)</li> <li>9. <i>El Vecino</i> (series, Spain)</li> <li>10. <i>Frontera Verde</i> (miniseries, Colombia)</li> <li>11. <i>Go! Vive a Tu Manera</i> (telenovela, Argentina)</li> <li>12. <i>Go! Vive a Tu Manera</i> (telenovela, Argentina) – 2nd season</li> <li>13. <i>Hache</i> (series, Spain)</li> <li>14. <i>Yankee</i> (series, Mexico)</li> <li>15. <i>La Casa de Las Flores</i> (series, Mexico) – 2nd season</li> <li>16. <i>La Reina del Sur</i> (telenovela, USA) – 2nd season</li> <li>17. <i>Monarca</i> (series, Mexico)</li> <li>18. <i>Preso n.º 1</i> (series, USA)</li> <li>19. <i>Tijuana</i> (series, Mexico)</li> </ol> <p><b>Prime Video – 5 titles</b></p> <ol style="list-style-type: none"> <li>1. <i>El Juego de las Llaves</i> (series, Mexico)</li> <li>2. <i>La Bandida</i> (series, Mexico)</li> <li>3. <i>Diablo Guardián</i> (series, Mexico)</li> <li>4. <i>Hernán</i> (series, Mexico)</li> <li>5. <i>Dani Who?</i> (series, Mexico)</li> </ol> <p><b>HBO Go – 1 title</b></p> <ol style="list-style-type: none"> <li>1. <i>Los Espookys</i> (series, USA)</li> </ol>	<p><b>Fox Play – 1 title</b></p> <ol style="list-style-type: none"> <li>1. <i>Sitiados: México</i> (series, Argentina and Mexico) – 3rd season</li> </ol> <p><b>Netflix – 1 title</b></p> <ol style="list-style-type: none"> <li>1. <i>Historia de un Crimen: Colosio</i> (series, Colombia and Mexico)</li> </ol>
<b>TOTAL: 23</b>	<b>TOTAL: 25</b>	<b>TOTAL: 2</b>

Source: Obitel Brasil

In 2019, we registered 25 Ibero-American fiction titles on VoD in Brazil, with prominence for Mexico and Spain, as well as in 2018, with ten and seven productions, respectively.

**Table 7. VoD premiere fiction in Brazil in 2019: countries of origin**

Country	Titles	%
<b>NATIONAL (total)</b>	<b>23</b>	<b>46</b>
<b>OBITEL COUNTRIES (total)</b>	<b>25</b>	<b>50</b>
Argentina	3	6
<b>Brazil</b>	<b>23</b>	<b>46</b>
Chile	0	0
Colombia	2	4
Spain	7	14
USA (Hispanic production)	3	6
Mexico	10	20
Peru	0	0
Portugal	0	0
Uruguay	0	0
Venezuela	0	0
<b>CO-PRODUCTIONS (total)</b>	<b>2</b>	<b>4</b>
Brazilian co-productions	<b>0</b>	<b>0</b>
Co-productions between Obitel countries	<b>2</b>	<b>4</b>
<b>GRAND TOTAL</b>	<b>50</b>	<b>100.00</b>

Source: Obitel Brazil

A total of 50 productions premiered on VoD, and 23 (46%) of them were from Brazilian. It is a significant number for the Brazilian streaming system, a territory where Globoplay appears with strength and productive competence in a market widely dominated by Netflix – also worldwide. Besides having a catalog with national series made exclusively for the platform, Globoplay also previously presents many of the premiere productions made for open TV, broadcasts Globo's live programming, displays chapters and on-

demand episodes of productions that are being aired, offers reruns of open TV shows, telenovelas, miniseries and series, in addition to investing in prestigious international productions.

Twenty-five productions (50%) of Ibero-American origin also premiered on VoD in Brazil, in addition to two (4%) co-productions between Obitel countries.

**Table 8. Formats of national and Ibero-American fiction on VoD**

Format	National				Ibero-American			
	Titles	%	C/E	%	Titles	%	C/E	%
Telenovela	-	-	-	-	3	12	90	21.79
Series	20	86.95	252	94.02	21	84	315	76.27
Miniseries	03	13.04	16	5.97	1	4	8	1.93
Unitary	-	-	-	-	-	-	-	-
Others (webseries, etc.)	-	-	-	-	-	-	-	-
<b>Total</b>	<b>23</b>	<b>100</b>	<b>268</b>	<b>100.0</b>	<b>25</b>	<b>100.0</b>	<b>413</b>	<b>100.0</b>

Source: Obitel Brazil

The series format dominated the national and Ibero-American streaming scene, with 41 productions, of which 20 (41.66%) were Brazilian and 21 (43.75%) were Ibero-American. Then come the miniseries, three Brazilian (6.25%) and one Ibero-American (2.08%). The numbers make it clear that, although the miniseries is artistically valued as the most well-finished product in the national industry, it is not the main bet for internationalization on Globoplay. We also have three Ibero-American telenovelas: the first two seasons of the Argentinean *Go! Vive a Tu Manera*, and the second season of *La Reina del Sur*, a production from the United States.<sup>19</sup> Overall, 268 national chapters/episodes were produced and shown in Brazil, corroborating the Brazilian productive capacity also in the VoD scenario.

<sup>19</sup> Despite the importance of making the Brazilian telenovela *Órfãos da Terra* available through Globoplay, for methodological reasons, including the fact that it is part of the top ten, this telenovela appears in this chapter as a production made for open TV.

#### 4. Fiction analysis: open TV, VoD and transmedia expressions in networks

Transmedia expressions in 2019 had an emphasis in social networks and streaming services for both music and podcasts as well as for videos. Netflix is known for its engagement in networks, particularly on its official pages on Twitter, Instagram, and YouTube, with exclusive videos for the Brazilian audience. Globo has been maturing its practices in social networks with actions regarding contents present on Gshow, Facebook, Twitter and Instagram accounts.

In the telenovela *A Dona do Pedaço* (Globo), the character Vivi Guedes expanded the narrative to the social media space through the Instagram account @estiloviviguedes, which intensified the plot experience – the receivers and their fans could access exclusive content, fashion and make-up tips. The character’s photo shootings shown during the telenovela were made available in the network, a strategy that brought the audience even closer. At the end of the telenovela, Globo prepared special content for Gshow: the actress interviewed her character, who left the 9 pm slot and said goodbye to Instagram, changing her account to @pravcarrasar. But the change did not please the audience, who accessed the profile and expressed their dissatisfaction.

Gshow produced two programs about the 7 pm telenovela *Bom Sucesso*: the *Clube do Livro*, presented by the actor Antônio Fagundes, focused on discussions of books cited in the fiction; and *Papo de Novela: Bom Sucesso*, with backstage, summary of chapters and other plot information. These two contents were offered in podcast, available on the main streaming platforms, and in video format, posted weekly, after the chapter was aired.

On the official channel of the telenovela *As Aventuras de Poliana* (SBT) on YouTube, the talkshow *Tricô Show* was created, in which the character Dona Branca received a guest every week. These interviews addressed themes discussed in the telenovela, complementing the main plot. It demonstrates that “transmedia requires the production and distribution of content, distinct and as-

sociated with each other, on multiple media platforms, with the purpose of complementing or intensifying the consumption experience of a certain text” (Fechine & Lima, 2019, p. 120).

According to Kantar Ibope Media, among the ten fictions most discussed online in the country, nine were telenovelas. The highlight was *A Dona do Pedaço* (Globo), which surpassed the last season of *Game of Thrones* (HBO), accounting for 487 million impressions on Twitter. In the next table we note the predominance of Globo’s productions at different timetables, and it is clear that the productions invested in transmedia content had more repercussion.

	Fiction	Channel	Tweets (000)	Total expressions
1	<i>A Dona do Pedaço</i>	Globo	2,677	487,953
2	<i>Game of Thrones (8th season)</i>	HBO	1,727	270,031
3	<i>Bom Sucesso</i>	Globo	779	140,767
4	<i>Avenida Brasil (rerun)</i>	Globo	590	114,517
5	<i>Órfãos da Terra</i>	Globo	498	67,432
6	<i>Amor de Mãe</i>	Globo	439	105,307
7	<i>Espelho da Vida</i>	Globo	346	54,980
8	<i>Verão 90</i>	Globo	324	59,769
9	<i>As Aventuras de Poliana</i>	Sbt	251	29,545
10	<i>Malhação – Toda Forma de Amar</i>	Globo	243	53,241

Source: Kantar Ibope Media

## 5. Highlights of the year

### 5.1. *Segunda Chamada* and *Sob Pressão*: the moment of the naturalistic series

The representation of the precariousness of the Brazilian public policies is highlighted in two dramatic series by Globo: *Sob Pressão* (2017-current) and *Segunda Chamada* (2019). With different themes, health and education, both portray the daily lives of professionals who persist in the exercise of their professions.

The third season of *Sob Pressão* explored the protagonists’ loving relationship amid the chaotic routine at the Emergency Mobile Care Service (Samu). The representative cases, treated in each

episode, ratified the naturalistic proposal of the series with the approach of themes such as violence in Rio de Janeiro, the use of drugs and the scrapping of the public health service.

Set on the outskirts of São Paulo, *Segunda Chamada* presents the personal dramas of students and teachers in a Youth and Adult Education (EJA) class at a fictional public school. As in *Sob Pressão*, each episode tells the story of a different character, with themes such as transphobia, racism, and schooling at the old age. The two series converge in the focus of tense situations, with realistic scenes and high dramatic load. Such characteristics indicate the consolidation of the series format in the approach of dense and complex guidelines, as occurs in Brazilian telenovelas of a naturalistic character, especially at 9 pm, the high prime time.

In both series, the accentuation of reality faithfully portrays the country's social, political and economic daily life. *Sob Pressão* combines the characteristics of American medical series with naturalism, a keynote of Brazilian television drama. *Segunda Chamada*, on the other hand, portrays obstacles faced by teachers: scrapping, devaluation of public education, low wages, violence, among others.

## 5.2. Literature in telenovelas: the case of *Bom Sucesso*

*Bom Sucesso* (Globo, 2019) had the best audience in the 7 pm time slot since *Cheias de Charme* (Globo, 2012), surpassing the last 13 telenovelas showed between<sup>20</sup> them. It told the story in a simple, light, and good-natured way, unusually mixing death, literature and Carnival. Set mainly in the suburb of Rio de Janeiro, it took advantage of classic literary works, national and foreign ones, in its plots. Excerpts from books were cited according to the narrative situation. Sometimes, when reading, characters were also transported to the stories, whose scenes had costumes and scenarios consistent with

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<sup>20</sup> Source: Kantar Ibope Media – 15 Markets.

the book in question. The appreciation and encouragement of reading were perceived in the context of the reception: a survey found an increase in Google searches for the books mentioned.<sup>21</sup>

The plot also addressed controversial issues, such as class distinction. And the dialogue with the country's current affairs was present in the ironies of the villain plot alluding to controversial phrases said by President Bolsonaro. Even without the objective of dealing with racial issues, the telenovela had countless black actors in different groups and social roles, without being in a condition of subordination. Gender identity issues were also discussed, in terms of social merchandising, through a transgender character and her entourage.

## **6. Theme of the year: melodrama in times of streaming**

Since the beginning of the historical series, in 2007, the *Obitel* Yearbook has registered a continuous intensification regarding the hybridization of forms and content in Brazilian television fiction. From the 2000s onwards, with the popularization of North American series enhanced through the consumption of these products on other media, such as streaming platforms, we identified the accentuation of the trend of “serialization of telenovelas” and “telenovelization of series”.

The present context has been marked by transformations that occur quickly and profoundly in the genres and modes of audiovisual production. A symptom of this is the change that has been taking shape within traditional television formats, more recently characterized not only by hybridization, but also by the rupture of a pragmatic status through which viewers usually recognize both television genres and discursive strategies present in fictional genres (Mungioli, 2012).

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<sup>21</sup> <http://bit.ly/2xVLG6u>

Currently, new forms of television narrative and the mixing of genres reconfigure the techniques of the means of gender representation, now more multifaceted (Mungiolli, 2012). Such innovations in media formats drew the attention of scholars like Mittell (2015), who paid attention to the formal progress of the television narrative model, conceived from its historical contexts of production, circulation and reception, and to the transformation of norms established through creative practices.

In Brazil, this scenario is most evident in the 2010s, based on stories that have been investing in short arcs and plots, providing a dynamic flow of stories and characters and expressing agility for action. Examples of this phenomenon were the telenovela *A Regra do Jogo* (Globo, 2015), in which each chapter was numbered and given a title that alluded to the day's events – specifying the existing tension between chapter and episode –, and the adhesion, in 2017, to the denomination “superseries” by Globo for its 11 pm fictions.

The phenomenon of telenovelization of series, in turn, can be verified on a global level in the so-called “third golden age” of the USA television (Martin, 2014), marked by the premiere of the series *The Sopranos* (HBO, 1999-2007). Since then, the series started to bet more and more on long dramatic arcs, embracing the whole season, if not the series as a whole. From another perspective, series such as *Ingovernable* (2017-current) and *Coisa Mais Linda* (2019-current), both from Netflix, illustrate Latin American examples of this trend of telenovelization of short serial formats by the explicit adherence to melodramatic excerpts. The first is a Mexican drama of political nature, while the second deals with the emergence of bossa nova in Rio de Janeiro in the 1950s. It seems that Netflix seeks to approach the viewers in the region through equations based on the notion of *cultural proximity* (Straubhaar, 2004).

For Williams (2018), the greater the seriality of a text, the more it is subject to melodrama. The booklet's conformation allows the articulation between the serial structure and the periodicity of the chapter, that is, between the time of progress – the course of actions

– and the time of the cycle – the resumption of plots and characters that appeared throughout the narrative (Martín-Barbero, 2003).

The consequence of the current scope and mix of genres – intertwined, merged and reformulated – is that melodrama also has its meaning expanded, starting to integrate series and other formats that bring more fluid possibilities of identification (Mittell, 2015). In this scenario, shedding light on melodrama in streaming times, especially on telenovela, considering the space it occupies in the Brazilian audiovisual scene, can reveal the way television reconfigurations take place, since we are dealing with highly flexible content, adaptable to new logics of production and consumption.

### **Case study: *Órfãos da Terra***

In April 2019, after the debut of *Órfãos da Terra*, Globo announced that its chapters would be available on Globoplay one day before the broadcast on open television. It was the first time that this media group adopted such strategy with a telenovela – a television product that, over the years, has been incorporated into Brazilian culture in such a way that it has come to be characterized as a true *narrative of the nation* (Lopes, 2009).

However, the last five chapters of the story was aired first on open TV. In other words, despite *Órfãos da Terra* had reached satisfactory ratings on open TV and registered a 40% increase in audience on Globoplay<sup>22</sup>, the network decided to privilege the traditional logic of offering television content when the narrative reached its decisive moments.

Anyway, the model adopted for the distribution of *Órfãos da Terra* reveals the current digital transformation experienced by audiovisual in Brazil and in the world, with VoD quickly constituting itself as one of the most dynamic parts of the television sector by subverting the plastering of the timetable and providing new, more

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<sup>22</sup> <http://bit.ly/2x2AO6J>

individualized forms of reception and participation (Richeri, 2017). Aware of this movement, Globo offered a national and unprecedented telenovela on streaming, mixing its melodramatic cultural matrix (Martín-Barbero, 2003) with an emerging problem on the global era: the issue of forced diasporas and refugees (Néia and Santos, 2020).

By first circulating through the online environment, amid market pressures and new logics of production and consumption of audiovisual products, *Órfãos da Terra* made possible other forms of spectatorship (Richeri, 2017) and enabled to a multiple and increasingly multifaceted audience new rearrangements regarding assistance, besides the rigidity of the fixed timetable with unidirectional flow. Recent researches show that the viewer who is a telenovela fan still has TV as the main source of entertainment, however the connection occurs more and more mainly by smartphone.<sup>23</sup>

Williams (2018) argues that the notion of seriality does not only suppose the discontinuity and narrative fragmentation idealized by the authors of a particular work: dependent on a particular relationship with time, it also involves the experience of the enjoyment of the text by the viewer. The *ritualities* (Martín-Barbero, 2003) of assistance will also influence this equation: the public, to a greater or lesser degree, is able to build the seriality of a product according to the distribution strategies adopted by the production sphere. Such a phenomenon requires an increasingly active receiver as an agent, expanding the scope of the practices characteristic of the *culture of participation* (Jenkins, 2016) identified within the scope of Brazilian telenovelas in recent years – such as the creation of blogs and fanfics derived from television narratives.

In *Órfãos da Terra*, the war in Syria causes the protagonist, Laila, to seek refuge with her family – her parents, Elias and Misade, and her younger brother, Kháled, seriously injured due to the armed conflict. On this journey, they encounter the villain Aziz Ab-

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<sup>23</sup> <http://bit.ly/2JTjnbe>

dalla, a Lebanese sheikh who proposes marriage to the young lady in exchange for money for Kháled's treatment. At the same time, Jamil, one of Aziz's trusted men, falls in love with Laila without knowing that she has charmed her boss. With Kháled's death, Laila flees to Brazil with her family, and it is up to Jamil to capture her and take her back to the sheik. Jamil is also the object of desire for Dalila, Aziz's favorite daughter.

The melodramatic elements of the plot are evident in this description. For Néia and Santos (2020), when presenting foreign characters and their heavy dramas, loves and dislikes – in addition to the pompous costumes and palatial environments that characterized mainly the first chapters of the fiction –, *Órfãos da Terra* dialogues with the so-called *sentimental* phase (Lopes, 2009) of the Brazilian telenovela, between 1951 and 1968. At the same time, this fiction delves into the use of *naturalistic* (Lopes, 2009) and *documentary devices* (Odin, 1984 cited by Lopes, 2009), which, from the 1990s on, began to demarcate even more the specificity of Brazilian television fiction.

The narrative rhythm of *Órfãos da Terra* followed the trend of serializing Brazilian telenovelas, investing in plots that lasted from one week to a month and in strong dramatic hooks (Néia and Santos, 2020). If a viewer with access to Globoplay saw a chapter on television and became interested in what would happen next, he could use the platform to cure his curiosity. However, as the distribution in the online environment took place chapter by chapter – emulating the logic of TV –, and not in blocks, a model more common to series on demand, the viewer would have to wait the next day to see the sequence on Globoplay or two days to watch it on open TV. Therefore, there is still a certain limit as to the ritualities – and serialities – within the reach of the telenovela viewer.<sup>24</sup>

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<sup>24</sup> On the VoD platform, however, the viewer is free from commercial breaks, although the vignettes that indicate the break for these intervals remain. There are also no scenes from the previous chapter that are traditionally shown at the beginning of each broadcast on open TV.

The fact is that these fictions continue to take advantage of *miscegenation* (Martín-Barbero, 2003) between anachronistic and melodramatic narratives with contemporary technologies and imagery shared globally, seeking to adjust to the changing audience habits without, however, losing the characteristics that consecrated the narrative in the country – exactly those that captivate and catalyze large audiences.

### ***Final considerations***

Technological changes have accelerated the process of changes in the display and content of television shows (Mittell, 2015). Factors such as the emergence of DVD, the popularization of cable broadcasting and the advent of the internet and other digital technologies have opened space for new possibilities of participation and enjoyment of fictional worlds – which now go beyond the unilateral flow of traditional television (Gray & Lotz, 2012). Amidst this scenario, national television fiction also begins to seek and find, in the dialogue with new platforms for the production, sharing and distribution of content, a way to maintain its centrality in the Brazilian audiovisual scene.

Through its *hybrid* narrative, and as it emerged as Globo's first long-running fiction to privilege VoD over open TV during most of its exhibition, *Órfãos da Terra* demonstrates that the Brazilian telenovela constitutes, in fact, a space of construction of cultural identities that reflects a transnational perspective (Lopes & Lemos, 2019). Inserted in the context of digital practices and the phenomena of globalization of culture, TV fiction in Brazil follows a movement of deterritorialization of production and consumption under the condition of combining melodrama and the identifying features of national narratives with new technological possibilities.

The experience with *Órfãos da Terra* allows us to affirm that the narrative model conventionally attributed to Brazilian telenovelas – in which the melodrama is strongly linked to the question of national identity – has opened space for experiments and innovations

that are defying previous rules. This is another symptom of the current scenario of narrative and techno-marketing (re)arrangements that, within the scope of national and global audiovisual, increasingly tighten the boundaries between new media and traditional media.

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### 3

## COLOMBIA: MELODRAMA LIVES IN TIMES OF STREAMING

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### **Introduction**

The year 2019 in Colombia was characterized by the presence of a series of social and cultural phenomena of high impact on the population, such as the National Strike on November 21, when different sectors expressed their disagreement with the country's policies and the reforms that were being proposed for the new year. This situation led to a leading presence of the news on the small screen and, at the same time, an interesting reflection of national identity, the needs of various Colombian social groups and the cultural matrices of the nation. In this hectic context and in accordance with a certain global climate of crisis in democratic and government systems, a highly interesting television phenomenon emerges: the highly successful reappearance of the programs that marked different generations of compatriots and that, as in the past, once again led families to discuss episodes and situations presented under the classical structure of melodrama. Proof of this is the presence of *Yo Soy Betty, la Fea* as one of the most viewed productions of the year.

Even though it is not included in the list of the ten most viewed titles (due to its condition of being a reprise), it achieved a rating of 10.0 above other productions of 2019, which in turn highlights the deep connection between the Colombian mind and the melodramatic structure, without neglecting the definitive importance of contemporary media phenomena of nostalgia as a connecting element between the screens and the audience.

This is why, even in the deep configuration of meaning and narrative of the series released in 2019, as well as in the other reprises that were presented, mainly towards the end of the year, the living presence of melodrama becomes visible not only as a way of narrating, but, above all, as part of the cultural matrix of the nation, of its way of seeing the world and understanding reality. This is an element that, next to the convulsed and complex realities of the end of the year, allowed to demonstrate that deeply melodramatic character of the nation and that, independently of the ever-growing rise in the number of fiction offers on platforms, remains the essential element to capture the national audience. What they see on screen is directly similar to those ways of understanding the world that are still present, more than in the different interfaces, in the ways social relations are created, as well as the ways of being and thinking.

## **1. Colombia's audiovisual context in 2019**

The trend of recent years in Colombian television is preserved, with entertainment and reality shows being essential, along with an ever-expanding presence of series over and above the traditional telenovela. However, it is important to highlight some changes presented from the diversification of the programming of Colombia's three private channels and two public channels: during 2019, both public and private channels, from different perspectives, have made an important commitment in developing content that, from their fictions, evoke the remembrance of the past and the role of television in the different stages of the lives of Colombians. The time slots that initially had content delimited according to the different ages of the

audiences have republished and reformulated their contents to present animated series, reality shows and telenovelas that were rating milestones at certain periods in Colombian television.

Nostalgia has become a fundamental element of fiction in national television. From this same perspective, Canal Uno, within its specific audience strategy, has focused on its children’s programming grid, broadcasting a popular 1980s anime series, which became popular in Colombia in the 1990s. On the other hand, RCN has tackled nostalgia by rebroadcasting telenovelas like *Yo Soy Betty, la Fea*, among others, which caused a great impression in Colombian viewers the first time it was broadcasted. Finally, Caracol, which remains the dominant channel, continues to bet on the broadcast of reality shows during its prime time slot, with programs such as *Yo Me Lamo*, which seek to evoke, through the use of imitation, musical artists who were popular at a certain time in Colombia.

Similarly, public channels have approached nostalgia and memory as central points in their programming rebroadcasting telenovelas from the 1970s and 1980s, as well as documentaries and films such as *Cóndores no Entierran Todos los Días* and *Lady, la Vendedora de Rosas*, which, in their argument, proposed other ways to remember the country.

### 1.1. Open television in Colombia

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

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

Private channels (3)	Public channels (2)
Caracol RCN Canal Uno	Señal Colombia Canal Institucional
<b>Total channels = 5</b>	

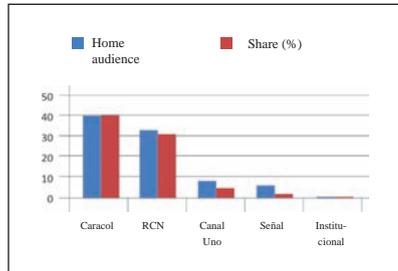
Source: Obitel Colombia

With regards to audience phenomena, along with the traditional leadership of private channels, a new trend is noticeable: unlike pre-

vious years, Caracol’s dominant place begins to be challenged by the growth of RCN.

**Graph 1. Rating and share of TV by channel**

Channel	Home audience	%	Share (%)
Caracol	15.2	43.4	41.2
RCN	13.5	35.8	33.8
Canal Uno	4.5	11.8	8.31
Señal	3.0	7.8	5.37
Institucional	0.5	1.2	0.86
<b>TOTAL</b>	<b>37.7</b>	<b>100</b>	<b>78.4</b>

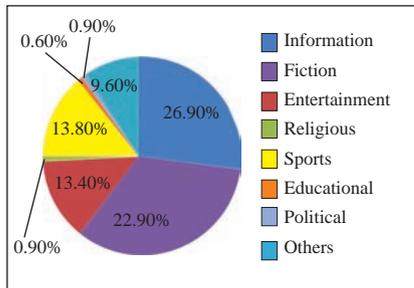


Source: Obitel Colombia and Kantar Ibope Media Colombia

Graph 1 shows a slight decrease in the case of Caracol as the channel preferred by audiences at the rating and share level. It is largely due to the boost given by the rerelease of productions like *Yo Soy Betty, la Fea* on RCN and the growth of Canal Uno as an alternative option. On public television, Señal Colombia’s increased presence is representative, so, although it is very distant from the other channels, it continues to be an important production space for alternative content and with great emphasis on quality.

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

Genres	Hours of transmission	%
Fiction	21287:30	33.9
Information	16870:30	26.9
Sports	8657:20	13.8
Entertainment	8358:30	13.4
Religious	590:30	0.9
Political	570:20	0.9
Educational	420:20	0.6
Others	5987:25	9.6
<b>TOTAL</b>	<b>62742:25</b>	<b>100</b>



Source: Obitel Colombia

In the 2019 television offer, fiction stands out again as the genre with the highest transmission and impact, mainly due to the new offer of various national and imported productions in all channels, in most time slots. Entertainment, however, despite not having the same presence, monopolizes the rating mainly because of reality shows. The sports genre decreased in importance and, in counter-balance, news or information programs increased their presence on television, taking up wide spaces at noon and at night. Additionally, social and political situations at the end of the year contributed to a greater presence of the genre on the small screen.

## **1.2. Pay TV**

During 2019, subscription television continues to be offered in Colombia through the companies Claro, UNE, DirectTV, Movistar, ETB and other small companies, with a large increase in users who have chosen this modality to access television in Colombia. With the entry into force of Resolution n. 665/2018, which expands the dimensions of subscription television to new types of platforms, Claro Video, Movistar Play, HBO, Fox Premium and other pay-per-view services that are offered within the servers of these companies have had to adapt to new resources and technologies, such as those provided through the internet and smartphone applications now available in the market. One of the most relevant news regarding the changes that companies have adopted to comply with this resolution is the one announced by Win Sports channel on December 23, 2019, regarding the launch of a premium channel where the viewer could have access to Colombia's national soccer matches. Even though this decision had strong detractors, the results of this strategy will only be visible in subsequent analyses once the channel starts airing in 2020.

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

The advertising investments for 2019 show an increase in three private channels, with a total of US\$ 4.462 million dollars. This in-

crease is due to the investment projected by Canal Uno, in its new audience strategy, which seeks to gradually position this channel as the one with the second highest rating nationwide. However, the results according to figures from Kantar Ibope Colombia continue to position Caracol as the channel with the highest investment, with a total of US\$ 2.487 million, of which a total of US\$ 854 thousand have been invested in telenovelas, dramatizations and series. These figures lead us to affirm that the programmatic horizon continues to bet most of the investment on the presentation of fiction as a priority for prime time in Colombia. For this reason, this broadcast space continues to be constituted as one with the highest advertising investment nationwide.

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

The merchandising and social merchandising offered by private channels in Colombia for the year 2019 reiterates strategies from other historical moments, relegating mainly to informational spaces rather than fiction in social campaigns, and to advertising and guideline offers in the case of the marketing of fictions in various time slots of television programming. Therefore, Caracol and RCN show a wide offer in the spaces for news programs dedicated to campaigns and positioning processes of a certain idea of recognition of the work carried out by various groups and subjects in terms of social work. The intention is to highlight the work of impact carried out by NGOs, business and collective groups in the underprivileged sectors. Likewise, both channels outreach to territorial and national entities to make contests and campaigns in which both the image of the channel and a certain idea of connection between television and its viewers are positioned beyond the relationship between the audience and producers in terms of consumption, if not better, at the level of interaction with their problems and visibility of their needs.

In the specific case of fictions, these are marketed through the use of all the media platforms of the channels. Expectation campaigns are created, small clips invite viewers to the premieres and,

in the news slots, screen time is provided to interview actors, directors and even screenwriters, in order to gather as many viewers as possible. Also, other strategies have appeared, such as holding massive events with themes alluding to fictions in popular sectors.

With regards to the revision of social merchandising proposals in 2019, it became visible how both channels RCN and Caracol offer different topics of interest, covering official government processes focused according to the proposal they present to institutional educational and cultural processes in the news programming. On the other hand, specifically in fiction, as in other years, the management of the social is linked to scenarios such as the Walk of Solidarity for Colombia and Telethon, spaces in which actors, actresses and partners of the fictions from both national private channels participate.

### **1.5. Communication policies**

Since 2018, the Ministry of Information Technology and Communications of Colombia has been promoting Bill n. 152/2018, or Convergence Law, with urgency to the Congress of the Republic. This project was presented as a government strategy to mitigate the dispersion of the different entities in charge of regulations, granting of concessions and those who exercise control over the ICTs, TV, and radio sound broadcasting. The Bill was approved by the Congress in June 2019, presenting articles of great impact for the coming years and, consequently, generating criticism from various academics and the Foundation for Freedom of the Press (FLIP).

Among the articles proposed, three have generated criticism such as “spectrum licenses for 20 years”, derived from concessions granted to mobile phone operators with the possibility of extension. Another article enunciates a “convergent regulator”, which is one of the points that has generated the most debate, against an entity that groups all the functions of surveillance, control and granting of concessions, dependent on the Executive Power through the new entity. Lastly, the creation of a “single ICT fund” was proposed, eliminating the funds they already managed, such as FonTic and

FonTV. With this, the government maintains that it may have more resources to improve the administrative function and modernize infrastructure and access, generating quality connectivity.

Even though in the Convergence Law, as the Colombian government calls it, the way OTTs converge as streaming channels or platforms is not clear, it does set a precedent against the independent role of entities that previously controlled the spectrum and monitored the communicative and audiovisual aspect of radio and television, which is now in the hands of a single entity.

## **1.6. Digital and mobile connectivity infrastructure**

In terms of infrastructure, although the objective set by digital terrestrial television (DTT) was to achieve full coverage of the territory by the end of 2019, DTT in Colombia currently has coverage in 772 cities and municipalities, in the 32 departments and 1.103 municipalities in the country, equivalent to a total coverage of 70% nationwide. The National Television Authority of the Republic of Colombia (ANTV), the National Radio Television of Colombia (RTVC), Caracol and RCN, City TV and the regional channels make up the work team for this project.

Even though in 2018 it was estimated that by 2019 there would be 80% coverage for private channels and 70.3% for public channels, the truth is that the reach of public channels was much more than that of private channels in 2019, with a total coverage of 50% for private channels (Caracol, Caracol HD, Caracol HD2, RCN DH, NTN24, City TV and El Tiempo Televisión) and 87.4% for RTCV channels (Señal Colombia, Señal Institucional, Canal Uno). Its installation continues to be carried out by the same user and is free of charge; to access the DVB-T2 format, the user must have a television that accepts this format, or have a special decoder to receives this signal.

On the other hand, the current government presented the details of the 2018-2022 ICT Plan, called “The digital future belongs to everyone”. This plan, which has a clear path to its development,

from the enactment of Law n. 1978, of July 25, 2019, will seek to overcome the connectivity gaps set forth in Obitel's 2018 report, where special reference is made to the low territorial coverage of broadband internet and the need to move forward with this coverage with regards to the regional average.

## 1.7. Independent production companies

In 2019, there is growth in independent production companies in Colombia, such as 64-A Films, AG Studios, CMO Producciones, Dago Garcia Producciones, Día Fragma Fábrica de Películas, Dramax Films, Dynamo Producciones, Laberinto Producciones, 11:11 Films & TV and Rhayuela Films – mostly linked to the Colombian Association of Independent Film Producers (Asocinde). Some of these producers have made series for Netflix and Claro Video, in addition to the content offer made for national channels. Besides, small production companies, such as Aurora Films, Sinergia Producciones, Cinema Films, Candelaria Films and Elevador Films, have found a way to make themselves known with miniseries or short films on YouTube.

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

**Table 1. Fictions broadcasted in 2019 (national and imported; premieres and reruns; and co-productions)**

PREMIERE NATIONAL TITLES – 11	PREMIERE IMPORTED TITLES – 17
<p><b>Caracol – 5 titles</b></p> <ol style="list-style-type: none"> <li>1. <i>Bolívar</i> (series)</li> <li>2. <i>Un Bandido Honrado</i> (series)</li> <li>3. <i>Dios Sabe Cómo Hace sus Cosas</i> (series)</li> <li>4. <i>La Ley Secreta</i> (series)</li> <li>5. <i>Loquito por Ti</i> (series)</li> </ol> <p><b>RCN – 6 titles</b></p> <ol style="list-style-type: none"> <li>1. <i>Celia</i> (telenovela)</li> </ol>	<p><b>Caracol – 6 titles</b></p> <ol style="list-style-type: none"> <li>1. <i>Amar a Muerte</i> (telenovela – Mexico)</li> <li>2. <i>Enamorándome de Ramon</i> (telenovela – Mexico)</li> <li>3. <i>Lazos de Sangre</i> (telenovela – Spain)</li> <li>4. <i>Sangre de mi Tierra</i> (telenovela – United States)</li> <li>5. <i>El Señor de los Cielos</i> (series – United States)</li> <li>6. <i>La Piloto II</i> (series – Mexico)</li> </ol>

<p>2. <i>Historias Clasificadas</i> (series)          3. <i>La Ley del Corazón</i> (telenovela)          4. <i>Noobess</i> (series)          5. <i>Anónima</i> (telenovela)          6. <i>Enfermeras</i> (telenovela)</p> <p><b>Canal Uno – 0 titles</b></p> <p><b>CO-PRODUCTIONS – 8</b></p> <p><b>Caracol – 3 titles</b>          1. <i>El Bronx</i> (series – United States and Colombia)          2. <i>Las Muñecas de la Mafia</i> (series – Spain and Colombia)          3. <i>Falsa Identidad</i> (telenovela – Mexico and United States)          4. <i>Maria Magdalena</i> (series – Mexico and United States)          5. <i>La Gloria de Lucho</i> (telenovela – Colombia and United States)</p> <p><b>RCN – 3 titles</b>          1. <i>Tormenta de Amor</i> (telenovela – United States and Colombia)          2. <i>Quién Mató a Patricia Soler</i> (telenovela – RTI and RCN)          3. <i>Manual para Ser Feliz</i> (telenovela – Teleset and RCN)</p> <p><b>Canal Uno – 0 titles</b></p>	<p><b>RCN – 9 titles</b>          1. <i>Jesús</i> (series – Brazil)          2. <i>Justicia</i> (series – Brazil)          3. <i>Los Milagros de Jesús</i> (series – Brazil)          4. <i>Caer en Tentación</i> (telenovela – Mexico)          5. <i>En Tierras Salvajes</i> (telenovela – Mexico)          6. <i>Ringo</i> (telenovela – Mexico)          7. <i>La Guzmán</i> (series – Mexico)          8. <i>Las Amazonas</i> (telenovela – Mexico)          9. <i>Mi Adorable Maldición</i> (telenovela – Mexico)</p> <p><b>Canal Uno – 2 titles</b>          1. <i>Sin Senos Hay Paraíso</i> (series – United States)          2. <i>Fugitiva</i> (series – Spain)</p> <p><b>RERUNS – 14</b></p> <p><b>Caracol – 2 titles</b>          1. <i>Abismo de Pasión</i> (telenovela – Mexico)          2. <i>La que No Podía Amar</i> (telenovela – Mexico)</p> <p><b>Canal RCN – 10 titles</b>          1. <i>Lady, la Vendedora de Rosas</i> (telenovela – Colombia)          2. <i>Café con Aroma de Mujer</i> (telenovela – Colombia)          3. <i>Yo Soy Betty, la Fea</i> (telenovela – Colombia)          4. <i>El Estilista</i> (telenovela – Colombia)          5. <i>El Inútil</i> (telenovela – Colombia)          6. <i>Los Reyes</i> (telenovela – Colombia)          7. <i>Hasta que la Plata nos Separe</i> (series – Colombia)          8. <i>Quién Eres Tú</i> (telenovela – Colombia)          9. <i>Rosario Tijeras</i> (series – Colombia)          10. <i>La Rosa de Guadalupe</i> (series – Mexico)</p> <p><b>Canal Uno – 2 titles</b>          1. <i>Amores Cruzados</i> (telenovela – Mexico)          2. <i>Chicago</i> (Series – United States)</p> <p><b>TOTAL PREMIERE TITLES: 28</b>  <b>TOTAL RERUN TITLES: 14</b>  <b>GENERAL TOTAL TITLES: 42</b></p>
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In 2019, a greater number of series and telenovelas were broadcasted, showing considerable growth compared to the previous year. A slight tendency to air imported fictions is also visible, reporting 58% titles compared to 42% national titles, without neglecting the growing importance of co-productions on the small screen in Colombia.

**Table 2. Premiere fiction in 2019: countries of origin**

Country	Titles	%	Chapters / episodes	%	Hours	%
<b>NATIONAL (total)</b>	<b>11</b>	<b>39.3</b>	<b>840</b>	<b>100.0</b>	<b>518:00:00</b>	<b>98.0</b>
<b>OBITEL COUNTRIES (total)</b>	<b>17</b>	<b>60.7</b>	<b>0</b>	<b>0.0</b>	<b>10:28:48</b>	<b>2.0</b>
Argentina	0	0.0	0	0.0	0:00:00	0.0
Brazil	3	10.7	248	29.5	152:55:48	28.9
Chile	0	0.0	0	0.0	0:00:00	0.0
Colombia	11	39.3	840	100.0	518:00:00	98.0
Spain	2	7.1	25	3.0	15:24:36	2.9
USA (Hispanic production)	3	10.7	206	24.5	127:01:59	24.0
Mexico	9	32.1	710	84.5	437:49:59	82.8
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>8</b>	<b>0.0</b>	<b>580</b>	<b>0.0</b>	<b>249:30:59</b>	<b>0.0</b>
Colombian Co-productions	6	0.0	430	0.0	214:36:00	0.0
Co-productions between Obitel countries	2	0.0	150	0.0	34:53:48	0.0
<b>GENERAL TOTAL</b>	<b>28</b>	<b>100.0</b>	<b>840</b>	<b>0.0</b>	<b>528:28:48</b>	<b>100.0</b>

Source: Obitel Colombia and Kantar Ibope Media Colombia

With regards to the countries of origin, the growth of fictions in co-production and the greater presence of productions from Mexico and the USA are evident. Besides, national production maintains its dominance and presence, as well as its leading role in co-productions.

Table 3. Formats of national and Ibero-American fiction

Format	National					Ibero-American					
	Titles	%	C/E	%	H	Titles	%	C/E	%	H	%
Telenovela	4	36.4	348	45.8	481:24:00	9	52.9	711	56.7	438:27:00	0.6
Series	7	63.6	412	54.2	254:39:36	8	47.1	543	43.3	334:51:00	0.4
Miniseries	0	0.0	0	0.0	0:00:00	0	0.0	0	0.0	0:00:00	0.0
TV movie	0	0.0	0	0.0	0:00:00	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	0:00:00	0.0
Docudrama	0	0.0	0	0.0	0:00:00	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	0:00:00	0.0
<b>Total</b>	<b>11</b>	<b>100.0</b>	<b>760</b>	<b>100.0</b>	<b>736:03:36</b>	<b>17</b>	<b>100.0</b>	<b>1254</b>	<b>100.0</b>	<b>773:18:00</b>	<b>1.0</b>

Source: Obitel Colombia and Kantar Ibope Media Colombia

In the analysis of national and Ibero-American premieres, telenovelas and series prevail, retaining a ratio of almost 50% for national fiction. Obitel countries have been entering the Colombian television environment, and the titles corresponding to telenovelas and series are increasing. This is due to the economic and political openness that international channels such as Caracol and RCN have. Although Canal Uno's representation is more local, it has also allowed this inclusion of fiction (telenovelas and series) in its broadcasts.

**Table 4. The ten most viewed titles on open television**

	Title	Country of origin of the original idea or script	Channel	Format/genre	N. of chap./ep.	Time slot	Rating	Share
1	<i>Loquito por Ti</i>	Colombia	Caracol	Series	80	Prime time	13.8	42.14
2	<i>El Bronx</i>	Colombia	Caracol	Series	81	Prime time	11	40.2
3	<i>La Gloria de Lucho</i>	Colombia	Caracol	Telenovela	80	Prime time	12.9	38.4
4	<i>Bolívar</i>	Colombia	Caracol	Series	60	Prime time	10.2	33.42
5	<i>La Piloto II</i>	Mexico	Caracol	Series	80	Prime time	10	37.96
6	<i>Un Bandido Honorado</i>	Colombia	Caracol	Series	61	Prime time	9.8	28.52
7	<i>María Magdalena</i>	Mexico	Caracol	Series	60	Prime time	7.4	28.69
8	<i>Las Muñecas de la Mafia</i>	Colombia	Caracol	Series	56	Prime time	7.1	26.69
9	<i>Enfermeras</i>	Colombia	RCN	Telenovela	65	Prime time	7.0	25
10	<i>La Ley Secreta</i>	Colombia	Caracol	Series	60	Prime time	6.5	21
<b>Total productions: 10</b>				<b>Foreign scripts: 2</b>				
100%				20%				

Source: Obitel Colombia and Kantar Ibope Media Colombia

**Table 4a. The ten most viewed titles**

	<b>Title</b>	<b>Country of origin of the original idea or script</b>	<b>Channel</b>	<b>Format/genre</b>	<b>N. of chap/ep</b>	<b>Time slot</b>	<b>Rating</b>	<b>Share</b>
1	<i>Loquito por Ti</i>	Colombia	Caracol	Series	80	Prime time	13.8	42.14
2	<i>El Bronx</i>	Colombia	Caracol	Series	81	Prime time	11	40.2
3	<i>Bolívar</i>	Colombia	Caracol	Series	60	Prime time	10.2	33.42
4	<i>Un Bandido Honrado</i>	Colombia	Caracol	Series	61	Prime time	9.8	28.52
5	<i>Las Muñecas de la Mafia</i>	Colombia	Caracol	Series	118	Prime time	7.1	26.69
6	<i>Enfermeras</i>	Colombia	RCN	Telenovela	65	Prime time	7.0	25
7	<i>La Ley Secreta</i>	Colombia	Caracol	Series	60	Prime time	6.5	21
8	<i>La Ley del Corazón</i>	Colombia	RCN	Telenovela	277	Prime time	5.1	16
9	<i>Celia</i>	Colombia	RCN	Telenovela	80	Prime time	2.5	11
10	<i>Anónima</i>	Colombia	RCN	Telenovela	73	Late	2	2
<b>Total productions: 10</b>				<b>Foreign scripts:</b>				
100%				0%				

Source: Obitel Colombia and Kantar Ibope Media Colombia

Although the productions from Ibero-American countries are increasing, the audience prefers productions from Colombia, and it explains the fact that these are in prime time slot, which in this case corresponds to 8-10 pm. Canal Caracol has nine of the ten most viewed titles, including foreign fictions, and seven out of ten exclusively domestic productions. Likewise, it is not a minor detail that the dominant format is the series, again, so that, at the general level, only two telenovelas appear and, in the case of national fictions, only four.

**Table 5. Audience profile of the ten most viewed titles: gender, age, socioeconomic level**

	Title	Channel	Gender %		Socioeconomic level %		
			Female	Male	AB	C	DE
1	<i>Loquito por Ti</i>	Caracol	16.5	12.3	23.0	32.0	4.4
2	<i>La Gloria de Lucho</i>	Caracol	15.6	11.2	6.8	9.6	11.4
3	<i>El Bronx</i>	Caracol	12.7	10.5	13.7	25.8	26.1
4	<i>Bolívar</i>	Caracol	12.4	8.7	26.3	21.6	22.2
5	<i>La Piloto II</i>	Caracol	12.0	9.1	12.7	24.1	24.2
6	<i>Un Bandido Honrado</i>	Caracol	10.9	9.4	15.9	22.8	22.9
7	<i>María Magdalena</i>	Caracol	0.8	0.9	0.9	19.3	16.6
8	<i>Las Muñecas de la Mafia</i>	Caracol	8.3	6.9	13.3	8.4	4.7
9	<i>Enfermeras</i>	RCN	8.2	6.8	13.2	8.3	4.6
10	<i>La Ley Secreta</i>	Caracol	8.1	6.7	13.1	8.2	4.5

	Title	Channel	Age range %					
			4-11	12-17	18-24	25-34	35-49	50+
1	<i>Loquito por Ti</i>	Caracol	9.0	8.1	7.6	11.1	11.0	15.2
2	<i>La Gloria de Lucho</i>	Caracol	8.5	8.2	7.4	10.5	10.5	13.8
3	<i>El Bronx</i>	Caracol	6.1	5.3	6.9	10.4	10.4	12.7
4	<i>Bolívar</i>	Caracol	6.6	6.8	6.4	6.9	6.9	11.5
5	<i>La Piloto II</i>	Caracol	5.0	4.1	5.4	7.8	7.8	11.7
6	<i>Un Bandido Honrado</i>	Caracol	7.0	7.2	5.2	8.2	8.2	12.6
7	<i>María Magdalena</i>	Caracol	3.8	4.2	4.8	6.4	6.4	8.7
8	<i>Las Muñecas de la Mafia</i>	Caracol	0.4	0.3	4.3	6.6	6.6	9.1
9	<i>Enfermeras</i>	RCN	0.3	0.2	4.2	6.6	6.6	9.0
10	<i>La Ley Secreta</i>	Caracol	0.3	0.1	4.0	6.5	6.5	9.0

Source: Obitel Colombia and Kantar Ibope Media Colombia

Regarding gender, 58% of viewers are women, showing that in the prime time slot there is a greater access of the female population as spectator of fiction. The households that have the highest rating are those considered of middle class, due to the theme approached in each of the productions, whose aim is to generate certain identification processes in the viewers.

### 3. VoD Monitoring

#### 3.1. VoD in Colombia

In 2019, several Colombian productions premiered on video on demand (VoD) platforms. It is worth highlighting genres such

as comedy and suspense series on Netflix, Caracol Play and Claro Video. The topics covered in these television fictions are regional conflicts, criminal anthologies, daily life, and historical fictions.

**Chart 2. VoD in Colombia**

	<b>Platforms</b>	<b>Total</b>
VoD linked to open television channels	Caracol Play, RCN, RTVC Play	3
VoD linked to pay TV channels	HBO, Fox	2
VoD linked to telecommunication companies	Movistar+, Claro Video, Tigo One TV	3
VoD without links to TV channels	Netflix	1
<b>GENERAL TOTAL</b>		<b>9</b>

Source: Obitel Colombia

### 3.2. Earnings from VoD systems

VoD platforms Netflix and HBO reach 17% of Colombian households and this number is growing.<sup>1</sup> However, Netflix is the most watched platform, reaching 15% of the homes consulted and leaving HBO with 2%. The same source indicates that in 2019 Netflix had more than 2 million users, revealing a considerable percentage increase when it is considered that in 2014 there were less than 500 thousand users. Despite Netflix's outstanding market penetration, it is worth highlighting the management of the three cable operators (Claro Video, Movistar+, Tigo One TV), which have generated competitive strategies. It is necessary to refer to the cord-cutter consumer phenomenon, which opts to replace the consumption of cable or satellite TV by the consumption of online television or streaming. On the other hand, according to the Colombian Communications Regulatory Commission, studies on OTT in Colombia indicate that

<sup>1</sup> According to data from *El País*, which summarizes how the consumption of these channels has grown in Colombia. Available at: <https://www.elpais.com.co/economia/netflix-y-hbo-llegan-al-16-de-los-hogares-en-colombia-pero-no-desplazan-a-la-tv.html>

2% of subscription TV consumers have decided to cancel their services in the last six months, which shows a change in consumption habits. In 2019, Netflix published its Latin American profits, which were in the order of 2 billion dollars, a result of the investment of its 29.4 billion subscribers in the region (Ramos, 2019).

### 3.3. VoD analysis in 2019: national and Ibero-American premiere fiction

During 2019, TV fictions from Brazil, Mexico, Argentina, the United States, Chile, Spain and Colombia premiered on VoD platforms in Colombia. In this regard, it is worth mentioning that not all VoD content was transmitted from other countries, so, in the case of Netflix, it is not allowed to access said content since a different VPN has been created for each country and it is only accessed after a certain time in some cases, although gradually all the content ends up being published. In premiere fictions, topics such as social conflicts, criminal organizations, sports, and daily life stand out.

**Table 6. National and Ibero-American fiction broadcasted on VoD in 2019**

Premiere national titles	Premiere Ibero-American titles	Co-productions
<p><b>Netflix – 4</b></p> <ol style="list-style-type: none"> <li>1. <i>Distrito Salvaje</i> (series)</li> <li>2. <i>Siempre Bruja</i> (series)</li> <li>3. <i>Historia de un Crimen: Colmenares</i> (series)</li> <li>4. <i>Frontera Verde</i> (series)</li> </ol> <p><b>Caracol Play – 4</b></p> <ol style="list-style-type: none"> <li>1. <i>Ella</i> (series)</li> <li>2. <i>De Levante</i> (series)</li> <li>3. <i>La Nena II</i> (series)</li> <li>4. <i>Somos Buena Gente</i> (series)</li> </ol>	<p><b>Netflix – 28</b></p> <ol style="list-style-type: none"> <li>1. <i>El Marginal</i> (series – Argentina)</li> <li>2. <i>El Apache</i> (series – Argentina)</li> <li>3. <i>Casi Feliz</i> (series – Argentina)</li> <li>4. <i>No Hay Tiempo para la Vergüenza</i> (series – Argentina)</li> <li>5. <i>Puerta 7</i> (series – Argentina)</li> <li>6. <i>Alma</i> (series – Spain)</li> <li>7. <i>Hache</i> (series – Spain)</li> <li>8. <i>Alta Mar</i> (series – Spain)</li> <li>9. <i>Lo que la Verdad Esconde</i> (series – Spain)</li> <li>10. <i>Las Niñas de Alcasser</i> (series – Spain)</li> <li>11. <i>Sky Rojo</i> (series – Spain)</li> <li>12. <i>White Lies</i> (series – Spain)</li> <li>13. <i>Nicky Jam: El Ganador</i> (series – USA)</li> </ol>	<p><b>Netflix – 0</b></p>

<b>Claro TV – 1</b> 1. <i>La Otra Venezuela</i> (Series)	14. <i>Vai, Anitta</i> (series – Brazil)	
	15. <i>Spectros</i> (series – Brazil)	
	16. <i>Fútbol</i> (series – Brazil)	
	17. <i>O Escolhido</i> (series – Brazil)	
	18. <i>Irmandade</i> (series – Brazil)	
	19. <i>Sergio</i> (series – Brazil)	
	20. <i>Ricos de Amor</i> (series – Brazil)	
	21. <i>Especial de Natal de Porta dos Fundos</i> (series – Brazil)	
	22. <i>El Mecanismo T2</i> (series – Brazil)	
	23. <i>Monarca</i> (series – Mexico)	
	24. <i>Inquebrantable</i> (series – Mexico)	
	25. <i>Tijuana</i> (series – Mexico)	
	26. <i>Los Corruptores</i> (series – Mexico)	
	27. <i>La Casa de Las Flores 2 y 3</i> (series – Mexico)	
	<b>Movistar TV – 1</b>	
	1. <i>La Cacería</i> (series – Chile)	
	<b>Claro TV – 3</b>	
	1. <i>Bronco</i> (series – Mexico)	
	2. <i>Hijos de Su Madre</i> (series – Mexico)	
	3. <i>Claramente</i> (series – Mexico)	
<b>Total: 9</b>	<b>Total: 31</b>	<b>Total:0</b>
<b>GENERAL TOTAL: 40</b>		

Source: Obitel Colombia

It is possible to observe in Table 6 that nine national productions premiered on VoD: four on Netflix, four on Caracol Play and one on Claro Video. In the Ibero-American panorama, 31 productions were released, 27 on Netflix, one on Movistar TV and three on Claro Video.

**Table 7. VoD premiere fiction in 2019: countries of origin**

Country	Titles	%
<b>NATIONAL (total)</b>	<b>9</b>	<b>22.5</b>
<b>OBITEL COUNTRIES (total)</b>	<b>31</b>	<b>77.5</b>
<b>Argentina</b>	5	12.5
<b>Brazil</b>	9	22.5
<b>Chile</b>	1	2.5
<b>Colombia</b>	9	22.5

<b>Spain</b>	7	17.5
<b>USA (Hispanic production)</b>	1	2.5
<b>Mexico</b>	9	22.5
<b>Peru</b>	0	0.0
<b>Portugal</b>	0	0.0
<b>Uruguay</b>	0	0.0
<b>Venezuela</b>	0	0.0
<b>CO-PRODUCTIONS (total)</b>	<b>0</b>	<b>0.0</b>
<b>Colombian co-productions</b>	<b>0</b>	0.0
<b>Co-productions between Obitel countries</b>	<b>0</b>	0.0
<b>GENERAL TOTAL</b>	<b>40</b>	<b>100</b>

Source: Obitel Colombia

In the Ibero-American environment, there are VoD productions from seven countries: Colombia, Brazil and Mexico stand out with nine productions each; Spain with seven; Argentina follows with five productions; and then there are Chile and the United States, with one production each.

**Table 8. Formats of national and Ibero-American fiction on VoD**

Format	National				Ibero-American			
	Titles	%	C/E	%	Titles	%	C/E	%
<b>Telenovela</b>								
<b>Series</b>	9	100	90	100	31	100	310	100
<b>Miniseries</b>								
<b>Unitary</b>								
<b>Others</b>								
<b>Total</b>	9	100	90	100	31	100	310	100

Sources: Obitel Colombia

Table 8 shows that the series is the predominant format. It reflects the unified construction of a type of narrative that becomes the main one in the case of VoD platforms.

#### 4. Fiction analysis: open TV, VoD and transmedia expressions in networks

In the case of transmedia expressions, the most viewed fiction of the year was taken as a reference, mainly due to its capacity for synthesis in relation to the cultural and social matrices of the national population. This is an indicator of the preference of the Colombian audience for certain television stories that configure forms of identification or interest. However, the primary reason for choosing the fiction that will be presented here is framed in the fact that it has also been installed in other interfaces, evidencing the dispersion of the elements of this fiction through multiple channels, emphasizing the musical part.

The melodrama *Loquito por Ti* was first broadcast on October 10, 2018, with 8 million viewers, and ended on February 8, 2019, under the script of Carlos Fernández Soto and Ana Fernanda Martínez for Caracol, a private television entity. Set in a context such as that of the city of Medellín, Colombia, in the 1960s and 1970s, *Loquito por Ti* proposes a narrative in which music is a central part of the story. This detail is visually reinforced in color palettes, clothing and all the atmosphere of the time.

In a close friendship, the characters Camilo and Juancho, members of a tropical music orchestra, seek recognition as the best performers of this genre. The narrative line develops from the meeting of the two protagonists with Daniela, who comes from an upper class and with the idea of contradicting the fact that she cannot be an artist, a dancer. It is from there that the problematic core of the story is formed, as a picture of romantic competition, which is an effective way of capturing the viewer emotionally, since the same social and economic conditions are reproduced in the daily lives of viewers or are established as real imaginaries. In addition, traditional relationships are established, as a way to return to the past, through music or popular culture, easily recognizable in the tropical genre.

The presence of *Loquito por Ti* on YouTube is part of Caracol TV subscription channel, which means that it does not have its own

channel and that YouTube only presents advances of the telenovela, delivers videoclips of the songs performed in the fiction or leaves room to do karaoke with those songs. The latter case is the most viewed, and these views increased in December 2018, when tropical music is most listened to and the channel announced discounts on song downloads.

With regards to the interaction of the viewers, the use of various digital platforms revealed the public's desire for a second season. However, there are also comments that criticize some episodes; for the viewers, there is no congruence between some facts of the telenovela. To attend to this type of participation, the Colombian account @LoquitoOfficial was found on Twitter with just 60 followers, contrary to the Venezuelan account @LoquitoPorTiVV, with 923 followers, which shows an international acceptance of the production. The tweets about the production were mostly from Caracol Televisión's account.

On Instagram, the official account (@loquitoporticaracol.tv) was found with 6,587 followers, despite having only 103 publications, in addition to other unofficial accounts where the fans usually upload many more publications. On Facebook, four unofficial pages were found: one of them had 1,255 followers; and the most visited by users had 2,500 followers, 2,343 likes and 34,515 members. There they shared different information, previews of episodes, expectations of the audience, among others.

So, it can be said that what stands out in the interaction with the fiction *Loquito por Ti* is the use of specialized digital applications for music reproduction. The songs that are part of the melodrama and that are effectively part of the narrative framework can be downloaded from iTunes Store, Spotify, Deezer, Claro Music, Apple Music, Tidal, Google Play and NNapster.es. This last application is managed by Caracol, which is part of Caracol Play, where premium users (under payment) have access to the complete chapters of *Loquito por Ti*. Even so, the final chapter was offered completely free of charge by Caracol Play.

This allows us to understand that the trends in fictions in Colombia are framed in marketing strategies that bet on the relationship with musical products. It allows the narratives to transcend the main argument and move easily to other platforms where there is emphasis on the consumption of other elements. This seems to be so important that the soundtrack of *Loquito por Ti* is offered for free on Caracol Play, while the complete episodes have a cost. Therefore, it is possible to say that there is an increase in the success of producing content, in this case with references to the remembrance of the past, closely related to music.

In summary, it is in the music platforms that the scopes of fiction in Colombia are systematized, permeated by melodramas that have the melody as a protagonist, which allows a variety in the digital consumption of television. To illustrate, YouTube is used not only to access fiction by viewing chapters or previews, but also to view music videos that are produced with images of the fiction itself as a background. One of these videos obtained 776,296 views, considering the theme of the song and the time of the year, which was December.

## **5. Highlights of the year**

In 2019, at least four notable trends were presented on the small screen: the appeal to nostalgia as a narrative structural element or as a programming strategy; the demand of historical or biblical themes; the combination of humor and stories of self-improvement connected with the structure of classical melodrama; and, finally, the ever-present productions in which violence and drug trafficking are a fundamental part. A series of formulas that manage not only to bring the audience together, but also to make visible how Colombians are, think and act; and it is reflected in the fictions.

In the first case, the nostalgia works in a similar way to that proposed by Jenkins (2013) in relation to media environments, that is, through the emergence of either elements that summon elements constituting the past of the viewers or directly with the presence

of those figures, narratives and programs that accompanied other moments of the life of the audiences. This is the case of *Loquito por Ti*: a production that, despite its premiere nature, is located in a different historical context, in the peak of the tropical music that, even at the end of the second decade of the 20th century, continues to accompany the December celebrations of Colombians. But this is also the case of the success of two reprises: *Yo Soy Betty, la Fea* and *Lady, la Vendedora de Rosas* (with a rating of 8.9), which managed to position themselves among the most viewed not only to recover places in audience for RCN, but also as the sample of that deep connection between nostalgia and the viewer, who, regardless of whether all the elements of the story are known, once again sits and gets excited in front of the television. The past brought to the present seems to offer a certain bit of hope, a kind of magic of the past and a kind of construction of a territory of meaning to be able to face the crises of the present.

In a possible relationship with nostalgia, there are also, as a trend in 2019, productions that deal with the review of historical or religious events. This is the case of *Bolívar* and *María Magdalena*. In both, the biblical source or the historical data, despite being narrated with modifications when compared to the version of the historians or theologians, also achieves a significant interaction with the public, allowing the creation of these possible identifications with other times and also with figures that arouse the admiration of viewers. A process in which the biographical character of both productions plays a central role by bringing the viewer closer to those figures who become much more human and closer through the television fiction narrative.

But the most important identification appears when, as in classic melodramas, supported by the idea of triumph during difficulties, there are subjects that, either anonymously or by exploring the biopic, represent that cultural matrix of the Colombian as a melodramatic individual, both in search of daily sustenance and in the conditions to go from hero to villain. This is the case of *Loquito por*

*Ti*, which shows success in music in the face of the difficulties of a character in the town, but also the reconstruction of the life of the famous shoe shiner who became councilman of Bogotá in *La Gloria de Lucho*. And, finally, this is the same structure set in the history of the carnivalized criminal turned into a subject whose adventures mix melodrama with comedy, in that characteristic mixture of national productions, as is the case in *Un Bandido Honrado*.

Finally, the stories that have been on the national screen for years appear as an instant rating formula: the narratives of violence and drug trafficking, in which, together with a melodramatic handling of the stories, those structures typical of the relationship between nation and conflict both as a historical reality and as part of daily life appear. This can be seen in *El Bronx*, which recovers various cases that occurred in one of the most sadly famous streets in the capital dedicated to micro-trafficking, poverty and crime, and in *Las Muñecas de la Mafia* and *La Piloto II*, where weapons, ostentation and the logics of crime once again take the leading role.

These four trends mark television productions in 2019, where it has been possible to consolidate the approach, despite the appearance of new scenarios and forms of audiovisual consumption, in which the narrative structures still continue the same, not for a logic of the stories, but for a deep connection with the lives of the viewers. This profound relationship between the melodrama on screen and the one that is lived in everyday life, which, for this reason, allows nostalgia to succeed, makes it possible to watch once or a thousand times the same production of over a decade ago, and the biographies become more successful when they are closer to the conflictive, comic, tragic, deeply melodramatic Colombian daily life.

## **6. Theme of the year: melodrama in times of streaming**

With regards to the theme of the year selected for this occasion, the melodrama in times of streaming, we consider relevant to develop a first approach aimed at establishing the point of view that presides over our analysis of the issue. For the presentation of our

ideas, we have tried to maintain a productive dialogue with the proposed reference document for the seminar “El melodrama en tiempos de *streaming*” (Cassano et al., 2019).

Melodrama has established itself as the most characteristic expressive form of the way of being, feeling and acting of the Latin American, something that is intimately related to the way the historical past of these peoples and nations originate and how institutional knots are woven and the forms and practices of social and cultural interaction characterize each of the various moments, from the different periods through which this historical development takes place. It is a constituent part of that origin, of this heritage in which original elements and foreign elements are mixed essentially, from Spanish colonization and from the presence of the religious component, authoritarian and conservative thinking, the rebellion of the slave and the submissive subject, and the idiosyncrasies of the segments of the population that envisioned the possibility of autonomy and a differentiation of origins.

Towards the 1980s and 1990s in Latin America, due to the epistemological and investigative juncture that shook the social sciences in their encounter with cultural and communication studies and practices (especially the works of Jesús Martín-Barbero, García-Canclini, among others), a kind of great agreement was set to recognize the social and cultural dynamics of the region as a transversal vector, a symbolic-dramatic matrix, characteristic of the ways of being, feeling, expressing and living of these societies, something stated in a singular way in the melodrama. This would then be the most typical product or result, proper and inherent to said cultural matrix, which translates into practice, both in the intimate and in the public sphere, in the individual and in the social, in the day-to-day and the most solemn or extraordinary, a tension responsible for mobilizing at all times a game of forces, of elements or aspects found, opposed, whose oscillation, emotions, feelings, actions are translated into action flows, behavior patterns, games of concepts and codes. Thus, a prototypical action is established, which fluctu-

ates between harmony and conflict, stability and erosion, agreement and disagreement, love and hate, illusion and disillusionment, the romantic and the tragic; that is to say, in the same experience and in the force of its manifestation, opposite contents unfold, contents that equally cover those who participate in that plot.

The melodramatic matrix assumed from its continuous presence in the course of time in our social environment is an obligatory reference point for thinking and evaluating the forms of action, behavior and performance of individuals faced with the forcefulness of becoming, which places them in the different planes through which existence takes place. This matrix captures, through the contradictory force that frames it, the events, the personal stories that can be typified time after time and that involve, as central elements, protagonists, generally men and women, who turn from victims to heroes, from losers to achievers, from defeated to happy and exultant possessors of the illusion and happiness that the melodramatic solution still confined as a whole to the notion of destiny, understood as something that goes beyond human nature, that transcends earthly affairs and governs people's lives according to an inscrutable design. In correspondence with a vision of history linked to a gaze that transcends and tears reality between here and an afterlife, the final fate of the protagonists is confined to that beyond, generally divine, mystical, religious, unknown, but also provided with the ability to appropriate and identify with the interests of the underprivileged, the solution of injustice, the artificial overcoming of inequality; it is the resource of the one who lacks power to caress illusion, pleasure, enjoyment that comes from said exercise.

### **6.1. Nuances and interpretation**

The melodramatic matrix was conceived as a factor of great importance to think and materialize the articulation of the national, the meeting of the community installed in this field, the emergence of television as a privileged medium to dynamize this process and make it possible in a dynamic and highly effective way. This tele-

vision medium found in the telenovela the most prolific resource to recreate and massively disseminate the strength of melodrama, of the dramatic resource as an element with which large audiences coincide, can identify and recognize. It is worth remembering here the pioneering and very lucid work of Jesús Martín-Barbero (1992), when he organizes and leads the largest investigation in which the communication, social sciences and culture allowed to shed light and guidelines to achieve an in-depth understanding of the role of television in this region, and particularly in Colombia, to promote, through its content, formats and discourses, a recomposition and an encounter around the national. The essential basis was the capacity of the telenovela, as the author would say “to make this country communicate”, so this television genre acted as a resizing element of popular culture that, privileging the melodramatic structure and successively flowing through the diverse geographical regions, culminated with a rediscovery of the country itself, of its people and idiosyncrasies, of its particular and common projects, of that characteristic sign that still identifies us as beings who inhabit the spirit of the melodrama in our daily lives. And this power of the small screen to challenge that regional custom thematic diversity will be the melodramatic accent that guides the stories and always resolves them in that perspective of affirmative happiness, of emotional triumph, through which anguish, suffering, exclusion and invisibility are defeated, and, for a moment, existential fulfillment is reached.

The themes and characters, stories, settings, narrative threads and styles and all other series of elements that mobilize the telenovela change, but the supports, the indexes, the symbols that create the sense of continuity, similarity and affordability of this television genre are maintained. From *María*, by Jorge Isaacs, as the quintessential romantic tragic drama of Colombian literature and culture in the 19th century, through *La Vorágine*, by José Eustasio Rivera, the different stagings of Bolívar’s history as a hero, as an individual, as a lover, the omnipresent stories of pain, love, disillusionment and romance in all the regional telenovelas with memorable accomplish-

ments such as *Gallito Ramírez, Pedro, el Escamoso* and even *Yo Soy Betty, la fea* and *Café con Aroma de Mujer*, there is no doubt of the widespread recognition of the power of seduction that emanates from the melodramatic texture of the story and the construction of the characters to make them unforgettable and, at the same time, representative of the sensitivity of Colombians. This is something difficult to affirm in another type of aesthetic realization, except for works such as those by García Márquez or Mejía Vallejo.

Therefore, it is understandable that the use of this melodramatic matrix on television continues in the transformation of the telenovela to the form of series that prevails today, in which differences and similarities, changes and the narrative continuities become subtle. This way, the melodramatic series finally prevails and makes the transition, so that this aesthetic component inhabits the format of the series and remains in part in the new audiences, the new sensibilities and the new social and cultural subjectivities of the change of century when this transformation occurs. Proof of this is in *Bolívar*, a recent production centered on the hero's love drama with Manulita Saenz as the focal point from which the epic tone and intense rhythm are recomposed, dynamizing and maintaining the thematic unity through the episodes. It is evident that here a certain compression or suspension of time operates to concentrate it on those frames and moments where passion and emotion, loving and painful vortex raise the level of realization and the compendium of the viewer's emotions. Without this technical resource in narrative, the transition we mentioned would not be possible.

This also explains the decision of the *Yo Soy Betty, la Fea* reprise, the quintessential telenovela, maintaining its narrative formula and its moderately contemporary melodrama essence, in a kind of inter-transmediality positions itself and contributes to consolidate the *rating* in the competition between the two channels that dominate the *prime time* slot in Colombia. In this case, the telenovela format is dynamically fed back by the manifestations of the various platforms through which it emerges and contemporary media sce-

narios such as the meme, which contribute to its circulation according to the current transmedia dynamics.

Some rhetorical strategies of the field, in accordance with the predominance of streaming nowadays, are the use of the favorable environment of the melodramatic series to bring back reprises and reposition the telenovela format – the case of *Yo Soy Betty, la Fea*. This is also the case with the inclusion of figures consecrated in the genre in the past and used as a hook to conquer audiences and link them to follow-up the new format: recognized actors, resources such as music, sports, intertwined in the multimediation typical of current television productions.

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## MEXICO: THE MELODRAMA ON NETFLIX: TRANSFORMATION OR EVOLUTION?<sup>1</sup>

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### 1. Mexico's audiovisual context in 2019

The high expectations of change caused by the victory of Andrés Manuel López Obrador for the presidency of Mexico have not been translated into any substantive modification in the Mexican media ecosystem or in the communication policies that have led the media-state relations in the country. However, what has been modified/conditioned is the setting of the daily news agenda, since the new president has imposed a political-governmental communication framework by holding morning press conferences, in which, with little opposition from the media, he sets the topics to be discussed on a daily basis. It has created various problems with those media and/or journalists that have questioned the stances he has adopted, his plans and projects. The conflict escalated to such an extent that López Obrador has called his opponents “*prensa fifi*” (“snob press”), pointing out in a very clear way that these are actors who only seek to defend the privileges lost during his government by conservative media, or, as he has called them: “*la mafia del poder*” (“the power mafia”).

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<sup>1</sup> We thank Nielsen Ibove Mexico for providing the information regarding television audience and programming used in this chapter. Opinions about these are the responsibility of Obitel Mexico.

How has this changed the scene of national television fiction? First of all, we should point out that during 2019 various productions sought to reflect these political-social tensions persisting in the country, although they did not do it explicitly, but rather implicitly, as we could see in *Por Amar sin Ley*, *Sin Miedo a la Verdad* and *Médicos, Línea de Vida*, all of them produced by Televisa. Several episodes were also included to speak, from fiction, of the unrestrained insecurity that the country suffers, which generated, during 2019, a significant increase in the number of homicides, femicides and disappearances. These approaches to reality in television fiction caused a slight recovery in the household rating<sup>2</sup>: compared to 2018, the most viewed production this year was *Silvia Pinal, Frente a Ti* (Televisa), which got 17.73 points, half a point above the most viewed fiction in 2018 (*La Rosa de Guadalupe*, with 17,11 points).

Another significant change was made due to a bet for taking television fiction to video on demand platforms, such as Netflix and Amazon Prime Video. Both national productions got a place among the most viewed on these two platforms, which prompted the two TV stations in the country to establish collaboration agreements for the streaming of their content. For example, Televisa again placed some of its fictions on Netflix, while TV Azteca signed an agreement for its prime productions to be found on Amazon Prime Video, just as happened with the historical series *Hernán*, which portrays episodes of the conquest of Mexico by the Spanish Crown.

With this backdrop, we start this analysis where it is evident that the preferences of the audiences seem to be placed more and more on video on demand platforms than on television screens. Proof of this is that, at the beginning of 2020, Netflix decided to move its Latin American operation offices to Mexico.

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<sup>2</sup> The rating taken as a reference for this chapter is the *household rating*.

## 1.1. Open television in Mexico

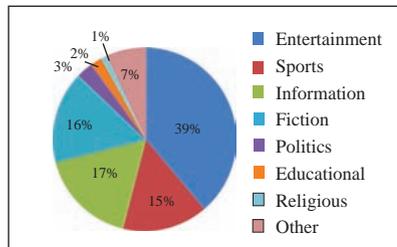
**Chart 1. National open TV networks/channels in Mexico**

Private networks (6 channels)	Public networks (3 channels)
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)
<b>TOTAL TV NETWORKS = 9</b>	

Although the new government taking office could have led to the opening of new concessions for national television, this has not happened. So there are still nine national television channels in Mexico.

**Graph 2<sup>3</sup>. Genres and hours broadcast on TV programming**

Genre	Hours	%
Entertainment	43112	39
Sports	16142	15
Information	18257	17
Fiction	17350	16
Politics	3589	3
Educational	2250	2
Religious	440	1
Other	7951	7
<b>Total</b>	<b>109091</b>	<b>100%</b>



Source: Obitel Mexico

In general, both entertainment (mainly movies and reality shows) and fiction continue to dominate television in Mexico. In 2019, the decrease in hours of sports transmission compared to 2018 stood out, and this was due to the fact that the matches of some major league teams (for example, Monterrey, Pachuca, Santos, etc.) stopped being broadcast on open national TV to be only broadcast through restricted channels, such as Fox Sports or ESPN.

<sup>3</sup> Graph 1 was not drawn up due to lack of information.

## 1.2. Pay TV

Although during 2019 the pay TV channels increased the premiere of fiction series (for example, *El Rey del Valle* on AXN), it has not been able to stop the drop in subscriptions. According to estimates of the Federal Institute of Telecommunications (Ifetel)<sup>4</sup>, in 2020 around 3 million homes will cancel their subscriptions to some cable or satellite television service due to the fact that audiences prefer to pay subscriptions to video on demand platforms.

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

Advertising expenditure on television plummeted 20% in 2019, and this slowdown in spending is due to the fact that, in 2018, both the federal elections and the soccer World Cup occurred. And another important variable is the decrease in official advertising in the media by the government, which fell by 50%.

## 1.4. Merchandising and social merchandising

A format that has worked for Televisa in prime time is the series (a telenovela with few chapters and several seasons). The first case is *Por Amar sin Ley*, which has two seasons (the first with 92 episodes and the second with 91). This is an adaptation of the Colombian telenovela *La Ley del Corazón*, by Mónica Agudelo. The plot takes place in a law firm (Vega y Asociados) and the interesting thing is that different cases are addressed to be defended by the firm's lawyers. This melodrama is crossed by the theme of organized crime and corruption.

The same producer (José Alberto Castro) presents *Médicos, Línea de Vida*. The story unfolds in an Institute of Medical Specialties in Mexico City. As in the previous case with the lawyers, doctors receive patients with different conditions, whose cause is briefly explained (even visually): diabetes, cancer or rare diseases.

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<sup>4</sup> <https://bit.ift.org.mx/BitWebApp/>

Health is an issue that is in public discussion, since millions of Mexicans do not have access to a decent health system. Corruption, gender violence, domestic violence, among many others, are topics that are everyday concerns, and Televisa is betting on addressing these social problems during prime time.

### **1.5. Communication policies**

Regarding the changes in communication policies during the new federal administration, the new rules in the regulation of official media advertising stood out, which was presented in late 2019. This new legislation aims, first of all, to create a media and audiences registry. The purpose is to generate equal conditions in terms of advertising, since it is, according to the government, about granting resources to all the media and not just to a few of them. Some of the central points of this policy are the following:

- a) it will be forbidden to use government propaganda to pressure, punish or reward communicators or the media;
- b) there will be a transparency website about information related to spending for each of the communication campaigns carried out by the government, and the spending cap will be 5.8 million pesos;
- c) it will be prohibited for a media outlet to have 25% of all advertising guidelines; when it comes to production it will be only with the public media and there will be no external hiring.

Currently, in the National Media Registry there are 2,052 radio stations and 1,590 national and local television stations, but the number of digital media in the country is unknown.

### **1.6. Digital and mobile connectivity infrastructure**

One of the biggest challenges of the Mexican government for the digital connectivity of the population is the “Internet for All” program, once a company that was awarded 50 thousand kilometers of fiber optics to carry internet to all corners of the country depends on the Federal Electricity Commission. In the words of the current

government, it is about “using the state’s own infrastructure to carry out, with the greatest economic efficiency, a social project”. This program should make this happen by the end of 2024. Currently, there are 80.6 million internet users in the country; of these, eight out of ten connect via smartphone.<sup>5</sup> Internet users spend 8 hours and 20 minutes connected daily.<sup>6</sup>

### **1.7. Independent production companies**

In Mexico, independent production companies have placed their efforts on video on demand platforms, mainly on Netflix, since there they find not only a showcase but also distribution possibilities, even though their creations are considered “Netflix original productions”. This is the case of *La Casa de las Flores*, directed and written by the filmmaker Manolo Caro; *Club de Cuervos*, directed by Gaz Alazraki; and *Diablero*, a horror series based on the novel *El Diablo me Obligó*, by the Mexican writer Francisco Hagenbeck. However, and despite the possibility that their work can be seen globally, some of these producers believe that there will be no business if they only create for Netflix, since the budgets they demand to maintain the quality of what they exhibit are over 15 million pesos.<sup>7</sup>

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<sup>5</sup> <https://bit.ift.org.mx/BitWebApp/>

<sup>6</sup> <https://www.asociaciondeinternet.mx/es/component/remository/ang-os-de-Internet/15-Estudio-sobre-los-Habitos-de-los-Usuarios-de-Internet-en-Mexico-2019-version-publica/ang.es-es/?Itemid=>

<sup>7</sup> <https://www.eluniversal.com.mx/cartera/netflix-el-enlace-de-mexico-con-el-streaming>

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

**Table 1. Fiction broadcasted in 2019 (national and imported; premieres and reruns; co-productions)**

<p><b>PREMIERE NATIONAL TITLES: 25</b></p> <p><b>Televisa: 16 titles</b></p> <ol style="list-style-type: none"> <li>1. <i>Ringo: la Pelea de su Vida</i> (telenovela)</li> <li>2. <i>Silvia Pinal, Frente a Ti</i> (telenovela)</li> <li>3. <i>Por Amar sin Ley II</i> (series)</li> <li>4. <i>Doña Flor y sus Dos Maridos</i> (telenovela)</li> <li>5. <i>Juntos el Corazón Nunca se Equivoca</i> (series)</li> <li>6. <i>Los Elegidos</i> (telenovela)</li> <li>7. <i>Sin Miedo a la Verdad II</i> (series)</li> <li>8. <i>Cita a Ciegas</i> (telenovela)</li> <li>9. <i>La Usurpadora</i> (telenovela)</li> <li>10. <i>Cuna de Lobos</i> (telenovela)</li> <li>11. <i>Médicos, Línea de Vida</i> (telenovela)</li> <li>12. <i>Soltero con Hijas</i> (telenovela)</li> <li>13. <i>La Rosa de Guadalupe 12</i> (unitary)</li> <li>14. <i>Como Dice el Dicho 6</i> (unitary)</li> <li>15. <i>Vécinos 3</i> (comedy series)</li> <li>16. <i>40 y 20 4</i> (comedy series)</li> </ol> <p><b>Co-production: 1 title</b></p> <ol style="list-style-type: none"> <li>17. <i>La Reina Soy Yo</i> (telenovela – Mexico/USA)</li> </ol> <p><b>TV Azteca: 4 titles</b></p> <ol style="list-style-type: none"> <li>18. <i>La Bandida</i> (series – Mexico-USA)</li> <li>19. <i>María Magdalena</i> (series – Mexico/USA)</li> <li>20. <i>Rosario Tijeras 3</i> (series – Mexico/USA)</li> <li>21. <i>Hernán</i> (series – Mexico/USA)</li> </ol> <p><b>Imagen TV: 2 titles</b></p> <ol style="list-style-type: none"> <li>22. <i>La Guzmán</i> (telenovela)</li> <li>23. <i>Un Poquito de Ti</i> (telenovela)</li> </ol> <p><b>Canal Once: 2 titles</b></p> <ol style="list-style-type: none"> <li>24. <i>Paramédicos 3</i> (series)</li> <li>25. <i>Niñas Promedio</i> (series)</li> </ol> <p><b>Canal 22: 0 titles</b></p>	<p><b>PREMIERE IMPORTED TITLES: 6</b></p> <p><b>Televisa: 5 titles</b></p> <ol style="list-style-type: none"> <li>26. <i>Sangre de mi Tierra</i> (telenovela – USA)</li> <li>27. <i>El Rostro de la Venganza</i> (telenovela – USA)</li> <li>28. <i>Mi Familia Perfecta</i> (telenovela – USA)</li> <li>29. <i>El Señor de los Cielos 6</i> (series – USA)</li> <li>30. <i>Sin Senos no Hay Paraíso</i> (series – Colombia)</li> </ol> <p><b>TV Azteca: 0 titles</b></p> <p><b>Canal Once: 1 title</b></p> <ol style="list-style-type: none"> <li>31. <i>Victoria</i> (series – Spain)</li> </ol> <p><b>RERUNS: 8</b></p> <p><b>Televisa: 3 titles</b></p> <ol style="list-style-type: none"> <li>32. <i>Familia Peluche</i> (comedy series)</li> <li>33. <i>Qué Pobres Tan Ricos</i> (telenovela)</li> <li>34. <i>Amores Verdaderos</i> (telenovela)</li> </ol> <p><b>TV Azteca: 4 titles</b></p> <ol style="list-style-type: none"> <li>35. <i>Alma Legal</i> (telenovela)</li> <li>36. <i>La Fiscal de Hierro</i> (telenovela)</li> <li>37. <i>Nada Personal</i> (telenovela)</li> <li>38. <i>Lo que la Gente Cuenta</i> (unitary)</li> </ol> <p><b>Canal Once: 1 title</b></p> <ol style="list-style-type: none"> <li>39. <i>Yolo</i> (series)</li> </ol> <p><b>TOTAL PREMIERE TITLES: 31</b>  <b>TOTAL RERUNS: 8</b>  <b>TOTAL TITLES BROADCASTED: 39</b></p>
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Compared to the year 2018, in 2019 there were five fewer fictions – four national and one imported –, which led to the release of only 30 premiere titles on Mexican screens. Among these productions stands out the largest production of telenovelas, with 14 national titles. Instead, this year only eight series were produced, five of them in co-production, mainly with companies from the USA.

**Table 2. Premiere fiction in 2019: countries of origin**

Country	Titles	%	Chapters/ episodes	%	Hours	%
<b>NATIONAL (total)</b>	<b>25</b>	<b>81.0</b>	<b>1221</b>	<b>73.0</b>	<b>1166:00</b>	<b>73.0</b>
<b>OBITEL COUNTRIES (total)</b>	<b>6</b>	<b>19.0</b>	<b>460</b>	<b>27.0</b>	<b>440:20</b>	<b>27.0</b>
Argentina	0	0.0	0	0.0	0:00	0.0
Brazil	0	0.0	0	0.0	0:00	0.0
Chile	0	0.0	0	0.0	0:00	0.0
Colombia	1	3.0	95	21.0	86:50	20.0
Spain	1	3.0	12	2.0	11:30	3.0
USA (Hispanic production)	4	14.0	353	77.0	321:00	77.0
<b>Mexico</b>	<b>25</b>	<b>80.0</b>	<b>1201</b>	<b>0.0</b>	<b>1146:00</b>	<b>0.0</b>
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>5</b>	<b>21.0</b>	<b>193</b>	<b>100.0</b>	<b>184:20</b>	<b>100.0</b>
<b>Mexican co-productions</b>	<b>5</b>	<b>100.0</b>	<b>193</b>	<b>100.0</b>	<b>184:20</b>	<b>100.0</b>
Co-productions between Obitel countries	0	0.0	0	0.0	0:00	0.0
<b>GENERAL TOTAL</b>	<b>30</b>	<b>100.0</b>	<b>1681</b>	<b>100.0</b>	<b>1606:20</b>	<b>100.0</b>

Source: Obitel Mexico

Of the 31 premiere titles in Mexican TV fiction in 2019, 24 were national productions and only six were imported. This implies a significant decrease compared to previous years, that had a strong presence of Hispanic (United States) and Brazilian telenovelas; in 2019, Brazilian telenovelas were no longer broadcast. This decrease in titles also generated a decrease in hours and episodes: in 2019 they both decreased by 15% and 18% respectively.

As for the formats of fiction, the telenovela continues to dominate the national and Ibero-American screens. It is important to highlight that, even though it represents the greater number of titles/hours, it is the most watched genre. As in 2018, the most viewed titles in 2019 are series and unitary shows, such as *La Rosa de Guadalupe*.

**Table 3. Formats of national and Ibero-American fiction**

Format	National						Ibero-American					
	Titles	%	C/E	%	H	%	Titles	%	C/E	%	H	%
<b>Telenovela</b>	14	56.0	715	59.0	750:00	64.0	3	50.0	255	55.0	235:00	53.0
<b>Series</b>	9	36.0	321	26.0	298:50	26.0	3	50.0	205	45.0	205:20	47.0
<b>Miniseries</b>	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0	0:00:00	0.0
<b>TV film</b>	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0	0:00:00	0.0
<b>Unitary</b>	2	8.0	185	15.0	167:00	10.0	0	0.0	0	0.0	0:00:00	0.0
<b>Docudrama</b>	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0	0:00:00	0.0
<b>Other (soap opera, etc.)</b>	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0	0:00:00	0.0
<b>Total</b>	<b>25</b>	<b>100.0</b>	<b>1221</b>	<b>100.0</b>	<b>1166:00</b>	<b>100.0</b>	<b>6</b>	<b>100.0</b>	<b>460</b>	<b>100.0</b>	<b>440:20</b>	<b>100.0</b>

Source: elaboration of Obitel with national data provided by Nielsen Ibope México, S.A. de C.V. MSS TV Software, Base "Rating regular 5 dominios + Dish". Total television programming during 2019.

**Table 4. The ten most watched premiere titles on open television<sup>8</sup>**

	Title	Country of origin of the original idea or script	Channel	Format / genre	Number of chapters/ episodes (2019)	Time slot	Household rating	Share
1	<i>Silvia Pinal, Frente a Ti</i>	Mexico	2	Series / drama	21	Prime	17.3	25.28
2	<i>La Rosa de Guadalupe 12</i>	Mexico	2	Unitary / drama	100	Afternoon	17.14	25.82
3	<i>La Usurpadora</i>	Mexico	2	Telenovela / drama	25	Prime	14.73	21.82
4	<i>Por Amar sin Ley 2</i>	Colombia	2	Series/ drama	91	Prime	14.36	21.67
5	<i>Ringo: la Pelea de su Vida</i>	Argentina	2	Telenovela / drama	81	Afternoon	14.22	25.65
6	<i>Como Dice el Dicho 5</i>	Mexico	2	Unitary/ drama	85	Afternoon	13.83	25.51
7	<i>Soltero con Hijas</i>	Mexico	2	Telenovela / comedy	45	Prime	13.70	20.03
8	<i>Sin Miedo a la Verdad 2</i>	Mexico	5	Series/ drama	23	Night	13.70	20.29
9	<i>Doña Flor y sus Dos Maridos</i>	Brazil	2	Telenovela / comedy	65	Prime	13.37	21.26
10	<i>Cuna de Lobos</i>	Mexico	2	Telenovela / drama	25	Prime	13.17	20.38
<b>Total productions: 7</b>				<b>Foreign scripts: 3</b>				
70%				30%				

Source: elaboration of Obitel with national data provided by Nielsen Ibope México, S.A. de C.V. MSS TV Software, Base "Rating regular 5 dominios + Dish". Total television programming during 2019.

<sup>8</sup> The ten most watched titles refer only to those fictions that premiered in 2019; therefore, this top ten may not match with the ten most watched fictions during 2019 on Mexican open television.

During 2019, Televisa sought to produce – through the project *Fábrica de Sueños* (Dream Factory) – new versions of the most successful titles in its history. The ones that premiered this year were *Cuna de Lobos* (1986) and *La Usurpadora* (1998). Although these got to rank among the ten most watched premiere titles in 2019, their “success” was short-lived because both productions had to cut the number of episodes.

The most watched premiere title in 2019 was *Silvia Pinal, Frente a Ti*, a biopic of the famous actress of the golden age of Mexican cinema. Besides, the acceptance of unitary programs stands out, such as *La Rosa de Guadalupe* and *Como Dice el Dicho*, which broadcast their 12th and 6th seasons, respectively. In fact, *La Rosa de Guadalupe* is Televisa’s most exported fiction production in the last eight years.

**Table 5. Audience profile of the ten most watched premiere titles: gender, age, socioeconomic level**

Titles		Channel	Gender %		Socioeconomic level %		
			Women	Men	ABC	C	D+
1	<i>Silvia Pinal, Frente a Ti</i>	2	9.54	5.82	13.25	18.24	20.14
2	<i>La Rosa de Guadalupe 12</i>	2	9.2	5.51	10.79	16.69	19.44
3	<i>La Usurpadora</i>	2	8.36	5.02	10.11	16.76	14.87
4	<i>Por Amar sin Ley 2</i>	2	7.83	4.33	10.4	15.29	16.16
5	<i>Ringo: la Pelea de su Vida</i>	2	5.0	7.46	8.31	14.2	16.68
6	<i>Como Dice el Dicho</i>	2	7.63	4.3	8.95	13.88	15.77
7	<i>Soltero con Hijas</i>	2	7.58	4.31	7.94	13.89	14.5
8	<i>Sin Miedo a la Verdad 2</i>	5	7.48	4.76	6.2	13.8	14.65
9	<i>Doña Flor y sus Dos Maridos</i>	2	7.15	4.78	8.29	12.36	14.53
10	<i>Cuna de Lobos</i>	2	7.18	4.38	8.41	13.16	13.79
Titles		Channel	Age group %				
			4-12	13-18	19-29	30-44	45+
1	<i>Silvia Pinal, Frente a Ti</i>	2	7.14	5.61	5.39	8.17	10.69
2	<i>La Rosa de Guadalupe 12</i>	2	8.51	7.29	5.89	7.33	10.14
3	<i>La Usurpadora</i>	2	6.35	6.69	5.03	6.13	8.67

4	<i>Por Amar sin Ley 2</i>	2	5.44	5.13	4.49	6.45	9.07
5	<i>Ringo: la Pelea de su Vida</i>	2	7.27	5.64	4.88	6.13	8.65
6	<i>Como Dice el Dicho</i>	2	7.2	5.73	5.56	5.88	7.43
7	<i>Soltero con Hijas</i>	2	6.8	6.33	4.79	5.47	7.51
8	<i>Sin Miedo a la Verdad 2</i>	5	5.96	6.48	4.69	5.82	7.83
9	<i>Doña Flor y sus Dos Maridos</i>	2	6.77	5.04	4.77	6.19	7.59
10	<i>Cuna de Lobos</i>	2	4.97	5.16	4.48	6.42	7.62

Source: elaboration of Obitel with national data provided by Nielsen Ibope México, S.A. de C.V. MSS TV Software, Base "Rating regular 5 dominios + Dish". Total television programming during 2019.

As has happened for the last six years, the audience for television fiction in Mexico is composed by women, people over 45 years old and people belonging to a middle or lower social class.

### 3. VoD monitoring

The ever closer link between the various video on demand platforms and Mexican audiences, especially the younger ones, has led these platforms to increase their offering during 2019, not only in terms of the number of fictions that were premiered, but also with respect to the new established industrial and commercial strategies, that now offer access to these platforms as a package through the acquisition of other telephony (fixed and/or mobile) and internet services.

#### 3.1. VoD in Mexico

Chart 2. VoD services available in Mexico

	Platforms	Total
VoD linked to open TV networks	Blim	1
VoD linked to pay TV networks	AXN, A&E Play, Sony Channel, Cinemax GO, Cartoon Network Go, Fox Play, HBO Go, TNT Go, WatchESPN	9
VoD linked to telecommunication companies	Claro Video, XView, Dish Móvil, Movistar Play	4

<b>VoD not linked to TV networks</b>	Cinépolis Klic, Amazon Prime Video, Crackle, Google Play, Microsoft Movies & TV, NBA TV, MLB Play, NFL Play, Netflix, Xbox Video, YouTube Red	<b>12</b>
<b>Total:</b>		<b>26</b>

Source: Obitel Mexico

Regarding video on demand services, in 2019 Movistar Play platform was incorporated. Linked to the Spanish telecommunication company, in its first stage it offers mostly series from that country. Mexico together with Brazil represent the main VoD market in Latin America, since in these countries Netflix dominates 80% of all subscribers to this type of platform. This market is so relevant for the US company that in January 2020 it announced the transfer of its operation offices for Latin America to Mexico City.

### 3.2. Profits from VoD systems

The main video streaming platforms with operations in Mexico managed to obtain, until September 30, 2019, 10.020 million paid subscription accounts, which meant around 15.17% more subscriptions than in 2018. Among these VoD platforms, Netflix remained the favorite among the Mexican audience, with approximately 6.783 million active accounts, while Claro Video obtained 2.075 million subscriptions in the same period. Another platform that grew as well was Amazon Prime Video, reaching 465 thousand clients in Mexico, while Televisa's Blim fell to 150 thousand subscribers.<sup>9</sup>

On average, according to data published by Netflix<sup>10</sup>, a Mexican spends 1.5 hour per day watching some content on their platform; and the population between 18 and 24 years old is the one that can stay logged in the longest: up to two hours. Netflix continues to be the VoD platform with the highest penetration in Mexico (8.7 mil-

<sup>9</sup> <https://dataxis.com/press-release/latin-america-svod-ott-subscribers-reached-21-million-q3-2018/>

<sup>10</sup> <https://media.netflix.com/es/press-releases>

lion subscriptions). In the country there are 19 subscriptions for every 100 households, while in the United States the number is much higher, 129/100, that is, more than one subscription per household.

Profits and its growth are not as expected, even though one of the strongest competitors has not yet arrived: Disney. Netflix's strategy is to establish agreements with internet provider companies (such as Prodigy) and pay television networks (Izzy and Sky, from Grupo Televisa) which are offering their services already. For example, Telmex trades its Multiple Play services, which include Netflix, Claro Video and Claro Música. The basic package will cost 499 pesos (23 dollars), which includes access to Netflix HD, browsing speed of 20 MB, fixed telephone line with unlimited calls, broadband internet, Claro Video, 100 GB of storage in Claro Drive and antivirus.<sup>11</sup>

Netflix earnings in Mexico for 2019 are estimated at 249 million dollars (Martínez, 2019). More Netflix users does not necessarily mean more profit, given that many share their accounts (49% do so, according to a CIU report). However, subscriptions increased approximately 10.5% until mid-2019.

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<sup>11</sup> <https://www.eleconomista.com.mx/empresas/Telmex-vendera-paquetes-de-multiple-play-con-Netflix-Clarovideo-y-Claro-Musica-20191122-0059.html>

### 3.3. VoD analysis in 2019: national and Ibero-American premiere fiction

**Table 6. National and Ibero-American fiction broadcasted on VoD in 2019**

Premiere national titles on VoD	Premiere imported titles from Obitel countries on VoD	National co-productions with other countries on VoD
<p><b>Netflix – 7 titles</b></p> <ol style="list-style-type: none"> <li>1. <i>La Casa de las Flores 2</i> (series)</li> <li>2. <i>Historia de un Crimen: Colosio</i> (series)</li> <li>3. <i>Monarca</i> (series)</li> <li>4. <i>El Club</i> (series)</li> <li>5. <i>Preso n.º 1</i> (series)</li> <li>6. <i>Club de Cuervos 4</i> (series)</li> <li>7. <i>Tijuana</i> (series)</li> </ol> <p><b>Blim – 6 titles</b></p> <ol style="list-style-type: none"> <li>8. <i>Simón dice</i> (series)</li> <li>9. <i>40 y 20 4</i> (series)</li> <li>10. <i>Reina Yo</i> (telenovela)</li> <li>11. <i>Juntos el Corazón Nunca se Equivoca</i> (telenovela)</li> <li>12. <i>Sin Miedo a la Verdad 2</i> (series)</li> <li>13. <i>Renta congelada</i> (series)</li> </ol> <p><b>Amazon Prime Video – 5 titles</b></p> <ol style="list-style-type: none"> <li>14. <i>Juego de Llaves</i> (series)</li> <li>15. <i>Diablo Guardián 2</i> (series)</li> <li>16. <i>La Bandida</i> (series)</li> <li>17. <i>Hernán</i> (series)</li> <li>18. <i>Dani Who?</i> (series)</li> </ol> <p><b>Claro Video – 1 title</b></p> <ol style="list-style-type: none"> <li>19. <i>Claramente</i> (series)</li> </ol>	<p><b>Netflix – 7 titles</b></p> <ol style="list-style-type: none"> <li>1. <i>La Casa de Papel 3</i> (series, Spain)</li> <li>2. <i>Las Chicas del Cable 3</i> (series, Spain)</li> <li>3. <i>Paquita Salas 2</i> (series, Spain)</li> <li>4. <i>Frontera Verde</i> (miniseries, Colombia).</li> <li>5. <i>El Marginal 3</i> (series, Argentina)</li> <li>6. <i>Apache</i> (series, Argentina)</li> <li>7. <i>Esclava Blanca</i> (series, Colombia)</li> </ol>	<p><b>Netflix – 1 title</b></p> <ol style="list-style-type: none"> <li>1. <i>Elite 2</i> (series, Spain)</li> </ol>
<b>Total: 19</b>	<b>Total: 7</b>	<b>Total: 1</b>

Source: Obitel Mexico

In 2019, 19 national fiction productions premiered on VoD platforms. Netflix broadcasted the most, with seven titles, followed by Blim, which released six. The fictions that generated the most

interactions with users were *Club de Cuervos*, *La Casa de las Flores* and *Elite*.

The commercial relationship between Amazon Prime Video and TV Azteca stood out. Together, they released their second co-production: *Hernán*, a historical fiction about the conquest of Mexico. Similar is the new relationship between Netflix and Televisa, which had broken relations in 2014, when the TV network launched Blim, its own VoD platform; however, it has not grown as expected. In 2019, some of Televisa's fictions reappeared in Netflix's offer.

**Table 7. VoD premiere fiction in 2019: countries of origin**

Country	Titles	%
<b>NATIONAL (total)</b>	<b>19</b>	<b>70.0</b>
<b>OBITEL COUNTRIES (total)</b>	<b>7</b>	<b>27.0</b>
Argentina	2	8.0
Brazil	0	0.0
Chile	0	0.0
Colombia	2	8.0
Spain	3	11.0
USA (Hispanic production)	0	0.0
<b>Mexico</b>	<b>19</b>	<b>67</b>
Peru	0	0.0
Portugal	0	0.0
Uruguay	0	0.0
Venezuela	0	0.0
<b>CO-PRODUCTIONS (total)</b>	<b>1</b>	<b>3.0</b>
Mexican co-productions	<b>0</b>	0.0
Co-productions between Obitel countries	<b>1</b>	100.0
<b>GENERAL TOTAL</b>	<b>27</b>	<b>100.0</b>

Source: Obitel Mexico

**Table 8. Formats of national and Ibero-American fiction on VoD**

Format	National				Ibero-American			
	Titles	%	C/E	%	Titles	%	C/E	%
<b>Telenovela</b>	2	11	82	21	-	-	-	-
<b>Series</b>	17	89	305	79	6	85	100	93
<b>Miniseries</b>	-	-	-	-	1	15	8	7
<b>TV film</b>	-	-	-	-	-	-	-	-
<b>Docudrama</b>	-	-	-	-	-	-	-	-
<b>Others</b>	-	-	-	-	-	-	-	-
<b>Total</b>	19	100	387	100:00	7	100	108	100

Source: Obitel Mexico

Regarding the origin and format of fictions on VoD platforms, it is important to notice the interest of these platforms to create exclusive fictions for each country and linked to specific sociocultural and sociopolitical issues. This is the case of *Historia de un Crimen: Colosio* and *Preso n.º 1*, on Netflix, and *Hernán*, on Amazon Prime. Besides, the series remains the king format on VoD platforms, with 22 of the 30 titles released during 2019.

#### 4. Fiction analysis: open TV, VoD and transmedia expressions in networks<sup>12</sup>

*Historia de un Crimen: Colosio* was produced for Netflix and directed by Hiromi Katana and Natalia Beristain. Its premiere was on March 22, 2019, on the occasion of the 25th anniversary of Colosio's murder. This fiction sought to rebuild and narratively propose a plot around this assassination, which remains unpunished. It shows thematic lines in the field of the representation of power and the forms of governance of Mexico in the past.

In order to think about how this fiction correlates with the construction of memory around this event, an analysis exercise was carried out on the comments made on the official page of the series that

<sup>12</sup> Part of this analysis can be found in the collaborative work carried out by Sánchez (2020).

Netflix, with the production company Dynamo, created on Facebook. The page has 20,809 followers. In this process, we decided to use the scraping tool Netvizz to collect and systematize, in a database, comments as a result of the interactions of the managers of this space created by Netflix on Facebook.

The data production period runs from March 18 to May 23, 2019 (first 15 days of viewing). A total of 83 posts, 6,657 comments and 42,291 total reactions were collected, ranging from the use of the five emoticons defined by the platform (Like, Love, Haha, Sad, Angry) to comments. The data produced allowed us to classify the types of reactions, according to their interaction, into four main types: evocative comment; criticism of the fictional narrative; personalized comments; and share comments. The first two are related to the way subjects narratively evoke and (re)build their experience in the form of memory in contrast with the fiction watched. The last two refer to the practices of the page itself, where other users are invited, by sharing the page link, to watch something in particular, or random comments of various kinds are expressed. Most of them are insults generated by the characters of the fiction, or comments related to the experience of the superposition of the fictitious entity with the particular historical real person/event.

Starting from the idea that every plot is arranged based on the characters' desire to get an object of desire (get somewhere, overcome an obstacle, get a good, get another character's love, etc.), in *Historia de un Crimen* the narrative emphasizes on getting to uncover the characters who orchestrated the murder of the presidential candidate. In the review of narratives on the viewing of the series, it is possible to identify a shared responsibility between the characters of Carlos Salinas de Gortari and his political close collaborators as the intellectual authors of the murder, and the character of Mario Aburto is perceived as a sacrificial character that enables the impunity of the former. We can see so in comments like this: "Intellectual authors: Córdoba, Raúl Salinas and Carlos Salinas, executed by López Riestra, Santos Oliva and Tranquilino Aburto was only

the scapegoat” (comment identifier: 794822070903681\_805364403182781).

This user points out that the actual individuals in the Mexican political sphere of that time are responsible for the crime. In particular, the suspicion of the audience links what was seen in the series with their own experience and narratives, in the form of memories, to identify Carlos Salinas de Gortari and other high ranking members of the Institutional Revolutionary Party (Partido Revolucionario Institucional – PRI) as guilty of the crime. This act of blaming on the former president, coming from those who comment, takes periphrastic forms and diverse allusions, such as “the bald man did it” or “we all know who did it”:

The political system of Mexico is clearly a shit, what else can we say, it is an open secret that behind all this Salinas was involved, he did not leave any loose ends, it is hinted, very clear, that it was them, the PRI is really a total shit, what are they waiting to put the Gortaris in jail, everyone knows the truth but nobody is going to tell it (comment identifier: 793134801072408\_795823967470158).

But somehow, didn't you notice that they tried to make Carlos Salinas look innocent? When he knew who orchestrated everything, but it is hinted that it was the Head of Office because he wanted Zedillo to become president. Why Zedillo wasn't with Colosio, being his Campaign Chief? Besides Manlio Favio and Raúl Salinas, I noticed that they wanted to show a Carlos Salinas hurt and betrayed, I don't know, that's how I felt it. Greetings (comment identifier: 794287837623771\_796618260724062).

As a consequence of this narrative of innocence superimposed on that in which the former president is the intellectual author of the crime, PRI is identified as guilty of the murder, as an undefined and

blurred collective entity: “It is cruel, it takes you to feel the pain of Diana Laura, and what she had to pay as a result of the speech that wasn’t acceptable to the PRI, State crimes” (comment identifier: 794286434290578\_794735000912388); “*Historia de un Crimen*, the PRI of always keeping silent and killing at its convenience!! Killing real politicians” (comment identifier: 793134801072408\_794044294314792).

The narrative proposal exhibited by the fiction *Historia de un crimen: Colosio* does place special emphasis on the way in which the entire party is represented. This one has a halo of decadent mafia-like organization. However, the way the viewers make comments about the Institutional Revolutionary Party has special nuances because they refer to a collective entity that continues without transformation or rearrangement, described as a “blood stained organization” or a “system”:

It is obvious that it would end that way, because we keep on going like that, without knowing and probably we will never know. Therefore, would they never had released the series? The series is perfect, there’s not one person to blame, but to the whole system, the PRI system. Salinas is the master of the orchestra and leader, but they were all guilty and participated in the death of Colosio (comment identifier: 794287837623771\_798446783874543).

This empirical approach offers an overview of how fiction can be a good instrument for the construction of memory about a fact from the past, which feeds on not only the narrative proposed from fiction, but also the proposal of interactivity created on the Facebook page, whose main motivation was the mystery behind who murdered Colosio.

## 5. Highlights of the year

### 5.1. Dream factory

Televisa considers itself a producer and disseminator of dreams. This is the name it has given to itself and, in 2019, it unveiled its project to produce its 25 most successful classic telenovelas in series format, with 25 episodes of 45 minutes each: *Cuna de Lobos*, *Rubí*, *La Usurpadora*, *El Maleficio*, *Colorina*, *La Madrasstra*, *Los Ricos También Lloran*, *Rosa Salvaje*, *Corona de Lágrimas*, *Quinceañera*, *El Privilegio de Amar* and *Corazón Salvaje*.

The first one to be produced was *La Usurpadora*. Originally, in 1998, it starred Gabriela Spanic, but in this new version the chosen actress was Sandra Echeverría. Its household rating was 14.73% and it was placed as the third most viewed premiere telenovela on open TV in 2019.

The next production was *Cuna de Lobos*, starring Paz Vega (Spanish actress), which got a household rating of 13.17%, placing it in the tenth place of the most viewed premiere telenovelas on open TV. The original version, broadcast in 1986, starring the actress María Rubio, was one of Televisa's most successful telenovelas. It was the first telenovela broadcast at 8 pm and it engaged the male audience as well, reaching, at that time, an average of 50 rating points, but the final episode reached 70.<sup>13</sup> Besides, for the first time, the main actress (María Rubio) of a Televisa's telenovela whose acts are considered as "evil" within the melodrama was supported by the audience, in contrast to the first telenovela produced in 1958, *Senda Prohibida*, starring Silvia Derbez, who had the role of "the mistress" and, at that time, was even attacked by the audience.

Televisa plans to broadcast in 2020 the telenovela *Rubí*, by the famous writer Yolanda Vargas Dulché. Its first version in Mexico (1968) was starred by Fanny Cano and broadcasted on Sundays,

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<sup>13</sup> <https://www.infobae.com/america/entretenimiento/2019/04/12/cuna-de-lobos-el-dia-que-una-telenovela-paraliza-a-mexico/>

thereby laying down a family hour to watch telenovelas. The actress who will star in *Rubi* is Camila Sodi.

Televisa announced that the rest of the productions that it had planned to produce are on standby since, although *Cuna de Lobos* and *La Usurpadora* got ratings that place them among the most viewed titles, the audience that watched the original telenovelas did not accept these new versions and the company was aiming to attract younger audiences. So Televisa continues to experiment and search for strategies to attract these audiences, but it has not been successful.

## **5.2. *La Rosa de Guadalupe*, the most exported fiction in 2019**

In 2019, at its Global TV Demand Awards, the audience measurement company Parrot Analytics awarded *La Rosa de Guadalupe*, Televisa's unitary show, as the Most In Demand Export From Latin America, being the fiction production with largest number of exports in the world. In the words of the producer, Miguel Ángel Herros, "the episodes of *La Rosa de Guadalupe* not only have impact on Mexico and the United States, but we also export to 23 countries, and in those countries they want to visit the Basilica of Guadalupe; that is why we include it in the episodes".<sup>14</sup> After 13 years on the air, this fiction has earned its place in Mexico as the most important TV product in the last ten years, always leading the preference of audience, mainly those of low and medium socioeconomic levels.

Its narrative consists of giving an account of miracles that the Virgin of Guadalupe performs, solving not only personal but also social problems, such as those related to violence, racism, discrimination and insecurity. Recently, it has been focused on addressing youth issues, such as bullying, cyberbullying, addiction to social networks, disappearances and new identities, although the focus is

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<sup>14</sup> Read the interview at: <https://www.lasestrellas.tv/programas/la-rosa-de-guadalupe/la-rosa-de-guadalupe-gana-premio-internacional-global-tv-demand-awards>

not on young audiences, but on what mothers and fathers should do to solve these problems.

Miguel Ángel Herros gives more details about the exportation of this telenovela:

some countries have bought “the tape”, the same episode is aired in their countries, but others have bought the format, that is, they adapt the stories according to their habits and customs. For example, Brazil first bought “the tape” and then the format. They will do it maybe with a virgin native to their country.<sup>15</sup>

*La Rosa de Guadalupe* premiered in 2008 and, to this day, 1,421 episodes have been produced and broadcast over 13 seasons. Herros also talks about its success:

I think the main reason that has made *La Rosa de Guadalupe* a project with good results is the respect we have for the audience. First you have to know who is watching and how far we can go with the story according to the broadcast schedule. The series is accepted by the audience as a TV show that, with reflection, with the appearance of the Virgin, gives us broad range of issues that finally are useful to parents and young people to take precautions.<sup>16</sup>

In 2019, to complement the lessons that are broadcast from its narrative to its audiences, the production of *La Rosa de Guadalupe* offered real-time advice, with experts (mainly psychologists and social workers) through their social networks, to answer questions that parents might have about the issues addressed on the series. This is something new for this kind of TV show.

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<sup>15</sup> Idem.

<sup>16</sup> Idem.

The strongest criticism this TV show has received focuses on the ideological and moralizing lessons behind each broadcast, since the problems that arise are not solved through justice or the State apparatus, but through the miracles that the Virgin of Guadalupe performs. It minimizes – from the screen – social and community organization because everything is relegated to waiting for the “miracle”, based on a Marian tradition that is exacerbated through the use of religious symbols and the commercial exploitation of faith and beliefs of Mexican audiences.

## **6. Theme of the year: melodrama in times of streaming**

### **6.1. *La Casa de las Flores***

#### ***Context in Mexico***

A large part of Mexican society has demonstrated over decades that it is class-biased, racist and homophobic, and it can be seen particularly in the upper-middle and upper classes. According to data from the National Survey on Discrimination (2017) applied by the National Institute of Statistics and Geography (Instituto Nacional de Estadística y Geografía – Inegi<sup>17</sup>), a little more than 20% of the population in Mexico stated that they had been discriminated last year. The reasons for this discrimination are skin tone, the way of speaking, weight, height, looks, social class, religious beliefs, sexual orientation, sex and age. According to this survey, only 3.2% of the population declare that they are not heterosexual and 96.8% declare to be heterosexual. This data may not be exact, because it is likely that a part of the non-heterosexual population will not declare their orientation, preference, and gender identity.

In recent years, diverse protests have taken place in Mexico to support the LGBT community, but also there have been protests

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<sup>17</sup> [https://www.inegi.org.mx/contenidos/programas/enadis/2017/doc/enadis2017\\_resultados.pdf](https://www.inegi.org.mx/contenidos/programas/enadis/2017/doc/enadis2017_resultados.pdf)

against it. An example of this is the march against the same-sex marriage, supported – presumably – by the Mexican extreme right-wing and the Catholic Church.<sup>18</sup> We provide these data because in *La Casa de las Flores* the topic of homophobia towards LGBT groups from a segment of Mexican society is addressed. Topics such as racism and class-biased judgment have always been present in Mexican telenovelas, but in *La Casa de las Flores* almost all the variant of the LGBT community are represented within only one family, but as a criticism towards that segment of Mexican society that is homophobic and practices a double-standard.

As in the classic melodramas, each of the main characters of this series has some secret. If any of these secrets came to light, the “ideal of a family” (made up of a man and a woman with their children, a model that traditionally has been represented in telenovelas) could be broken, as well as their reputation in a society in which the De la Mora family presents itself as “perfect”.

The matter of dispute is a flower shop that has the same name as the series. Its owner is Virginia de la Mora, played by an actress considered the queen of telenovelas in Mexico and probably in other countries of Latin America and even in the world: Verónica Castro. Virginia lives with her husband and three children in a mansion located in a high value area of Mexico City. In the first season (2018), Virginia seeks at all costs to “save face” regarding the affair her husband has with another woman and the lack of money. So, she struggles to keep her family together. But, above all, she will do everything she can to keep her flower shop.

### ***Main characters and their secrets***

*Virginia de la Mora* (Verónica Castro). Owner of “La Casa de las Flores”. She does not appear in the second season, but references about her are made during the whole series. Her secret: Paulina is

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<sup>18</sup> [https://elpais.com/internacional/2016/09/24/mexico/1474730874\\_758416.html](https://elpais.com/internacional/2016/09/24/mexico/1474730874_758416.html)

Salomón's daughter, with whom she had a relationship; she keeps the secret (before her friends) about the mistress that her husband used to have.

*Paulina de la Mora* (Cecilia Suárez). She is always worried about everything related to Virginia and the flower shop. She speaks slowly, in an unusual way.

*Elena de la Mora* (Aislinn Derbez). She loves men.

*Julián de la Mora* (Darío Yazbek). Bisexual. He cheats on Diego with other people (men and women) constantly.

*Diego Olvera* (Juan Pablo Medina). Julián's partner. His secret is that he knows that Virginia was sick, and the money he stole was for her.

*Ernesto de la Mora* (Arturo Ríos). Virginia's husband. He used to have a mistress and has a daughter. His secret: "La Casa de las Flores" Cabaret.

*Carmela* (Verónica Langer). Virginia's friend. Her secret: her young lover.

*María José* (Paco León). Trans woman. He (she) used to keep his (her) sexual orientation secret.

*Delia* (Norma Angélica). Housekeeper of the De la Mora family. She keeps secrets of the whole family. She is everyone's confidant.

In *La Casa de las Flores*, secrets are vital to the plot, and this is an important element that keeps similarity to the telenovelas broadcasted on open TV. There is a secret that later will be revealed in the course of the series.

### ***Flowers symbolism***

Each episode is named after a flower that has certain symbolism related to the content of that chapter: 1. rose: unity; 2. iris: faith; 3. lotus: mystery; 4. almond: awakening; 5. acacia: secret love; 6. carnation: whim; 7. geranium: consolation; 8. heliconia: fertility; 9. pansy: reflection. In this sense, the director of the series, Manolo Caro, explains:

Flowers are a super complex universe and, at the same time, aesthetically incredible. Complex because you send flowers when you are in love, when you are in mourning, when you suffer a loss, when someone is born, when you are getting married or when you get engaged. So, it is a universe that does very well for a series that has to move fast. And aesthetically, filming in a flower shop is fantastic: wherever you put the camera it will look good (the scene).<sup>19</sup>

### ***Resignification of family and a defense to keep it together***

The main thing is to keep the De la Mora family together. A redefinition of what is considered a “family” is established, unlike what was represented in classic Televisa telenovelas. In *La Casa de las Flores* the family is defended, but it is integrated and normalized by the combination of characters who are transgender + heterosexual-woman; homosexual-man + bisexual-man, etc. Regardless of their likes or preferences, what is important is the support among family members, no matter their sexual orientation, identity or preferences.

In the second season, when Virginia dies, there is a scene with the three De la Mora brothers in which, both visually and narratively, the bond and brotherhood among them is portrayed:

Paulina: “She died alone... she died alone in a hospital in Houston...”

The three of them sitting on a pink coffin, they hold hands.

Paulina: “Hey, I’m afraid because I haven’t cried... I just feel like, if I cry, I’m going to fall apart in small pieces. And then I won’t be

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<sup>19</sup> <https://www.informador.mx/entretenimiento/Manolo-Caro-la-mente-detras-de-La-Casa-de-las-Flores-20180806-0138.html>

able to get them together. I feel like I'm going crazy”.

Julián: “Don't worry, we help you glue them”.

### **Regulation**

On open TV, the Secretaría de Gobernación (Ministry of the Interior) regulates content and rates it for certain audiences: AA is for children; A is for all audiences; B is for adolescents; B15 is for adolescents over 15 years old; C is content not suitable for those under 18; and D means extreme and adult content. However, VoD platforms (in this case Netflix) have its own self-regulation: young children: G, TV-Y (public under 6 years old), TV-G; children: PG, TV-Y-7 (age 7 and over), TV-Y7-FV (age 7 and over, fantastic violence content), TV-PG; adults: R (restricted, minors must be accompanied by an adult); NC-17 (restricted to viewers over 17 years old), TV-MA (scenes of violence, sex, foul language, not suitable for minors).

*La Casa de las Flores* is classified as TV MA, that is, it is for an adult audience. Up to date, in Mexico there is no regulation for VoD platforms, so there is greater freedom to broadcast content and images. *La Casa de las Flores* shows nudes that have not been seen in open TV telenovelas, leading roles for characters belonging to the LGBT community, as well as vulgar language.

### **Format**

It has a series format, but the genre is melodrama. Regarding the visual aspect, it has a high-quality image. The episodes are 35 minutes long (nine in season 2), with dynamic scenes, and mostly in natural sets.

### **Exaggeration**

Shades of olive green, burgundy and pink are used in the decoration. The set design is exaggerated (colors, objects), the transvestite characters wear sequined dresses (as their stereotype) and they are heavily made-up; the walls of the mansion have enormous flow-

ers painted in colors, and the furniture has strong shades. Visually, the series has a surreal ingredient, very cinema-like. The set design always has flowers (vases, pictures).

Another important element is music. An example is the funeral of Virginia de la Mora, in which a transvestite “look-a-like” Yuri (singer) performs the song “Aire”. They also invite a tenor to the funeral, and the event takes place in the flower shop, which is decorated with hundreds of flowers. In other scenes, there is music, mariachi, etc.

### ***Double standard of morality***

As we have mentioned, in Mexican society, especially in the upper-middle and upper classes, there is a strong concern about what people may say and for keeping the appearances. It is at Virginia’s funeral that this double standard sustained by the family for years is broken:

Paulina: “You hypocrites, how many of you have done nothing but criticized my mom and my family... How many of you went to buy that story... while shitting on us. And now you pretend to be grieving... Today, today how many of you have spoken badly of my woman [she refers to María José – trans]... Homophobic, transphobic, backward shit... I don’t care about what you say because I’m won’t to be a victim of your double standards, nor your hypocrisy, because that was what kept me away from my mom [and crying on the coffin], mom, mom, mom...”<sup>20</sup>

This concern about “what people may say” has been also portrayed in many telenovelas. In this type of scenario, the desire is

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<sup>20</sup> It was a “special” episode, apart from the series, that shows the funeral of Virginia de la Mora.

that the “rich” son fall in love and marry someone belonging to his same socioeconomic class, but it turns out that he falls in love with a poor character, who in the end becomes a well-educated person, according to the social class in which she is stepping into. This plot is typical of Mexican telenovelas

### ***Object of desire***

The flower shop called La Casa de las Flores is the focal point of this melodrama and the object of desire. Virginia’s children will do whatever it takes to get it back. They are forced to sell it to “Chiquis”, who would be the villain of the melodrama. This character is blind, that is, she has a visual disability, and she insists on being the owner of the store, even though she cannot see the beauty of the flowers.

### ***Normalization of all kinds of relationships***

One of the proposals for meaning is to normalize LGBT relationships and to represent in an exaggerated way all these forms of relationships within a “wealthy” family in Mexico City (which we could understand as conservative). *La Casa de las Flores* is a criticism of the Mexican upper class, which is concerned about “what people may say”, revealing their best kept secrets or double standards (for example, they hide what really happens inside the family to their neighbor – who was abandoned by her husband and becomes the lover of a man that is at least 30 years younger than her, and she as well keeps the secret of that relationship). On the other hand, María José (who is a lawyer) helps a transgender character to carry out the legal procedures so that she can change her name and be recognized as a woman. Meanwhile, Paulina and María José’s son considers the relationship between his “mothers” normal.

### ***Criticism of homophobia***

For a segment of Mexican society, homosexual, transgender and other groups are considered sick people who must be “cured”.

In one scene, Paulina appears before Diego's parents (Julián's partner), who takes money from the De la Mora family and disappears:

Paulina: Well, as I was saying, I feel really concerned for your son.

Mother: He had great potential.

Father: Mm... It's a shame what he has become.

Paulina: I know, a whole criminal record.

Father: Well, yes, these days... well, nobody pays for those immoral acts anymore.

Mother: It would have been so easy for him to stay in control of his desires.

Father: As much as we tried to find a cure, nothing.

Paulina: What are you saying? Homosexuality is not a disease. Homophobia is.

Father: We are going to ask you to leave our house.

Paulina: Well... So sorry, but, unfortunately for you, stupidity has no cure (S2, E4).

In the case of Televisa's telenovelas, in the *Obitel* Yearbook 2019, we mentioned the love relationship between two men (Aristemo and Cuauhtémoc) represented in *Mi Marido Tiene Más Familia* (2018). For the first time in a telenovela, a kiss between homosexuals could be seen: "The story is not built on the basis of prejudice or morbid curiosity, but on the basis of recognizing a gender identity where these 15-year-old boys discover that they are different" (Franco et al., 2019, p. 188). This opened a window to represent other kinds of stories, more inclusive ones, where previously, from Mexican television production companies, there was rejection for representing relationships between homosexuals.

### ***Faith***

In the second season, a sect named "La Parvada" (The Flock) is included in the plot. It asks its members for financial resources and to engage in practices so they can belong to it. Ernesto de la Mora

joins the sect, so he can achieve “personal growth” and cleanse himself of everything he did before. On the other hand, a character comes up, he meets Elena, she sleeps with him, and he turns out to be a priest of the Catholic Church. This goes against the typical representations of faith and religion in Mexican telenovelas, where the Marian element and Catholicism have always been present, so this is another disruptive element of the series.

## 6.2. Final considerations

In *La Casa de las Flores*, the connecting thread is a combination between the typical sequence of telenovelas and the series, without exclusively complying with one or the other genre. It is like a telenovela delivered by parts where the sum of these is the complete story. And, at the end of each season, they leave it “on hold” with a great dose of suspense for the audience, which has to wait for the next season to know how the presented situation ends.

Netflix has known how to “exploit” the melodrama with *La Casa de las Flores* due to the link this genre has with the audience, but it does so from other narratives and aesthetics, and suggesting other interpretations and taking a stand in favor of LGBT groups and against homophobia, highlighting values such as family unity (regardless of how it is integrated). Finally, the melodrama element is still preserved: a united family, but here in opposition to the traditional composition represented and approved by the social system.

Regarding melodrama, Manolo Caro defended that his series used the melodramatic genre and he did so by pointing out:

It is a melodrama, but it must not be related to TV. We have disdained the genre for thinking that it ends up being cheesy or overacted, when it has nothing to do with it; its roots are based on the truth or the circumstances of the drama, and in this case the family receives the bombshell that their father has another woman and other children. There is a hilarious and comedy

touch. It is the tone in which we have worked here.<sup>21</sup>

Netflix confirmed that *La Casa de las Flores* will have its finale with the third season to premiere in 2020. This series, according to Parrot Analytics<sup>22</sup>, was ranked as the most watched title in Mexico and the seventh in Latin America in 2018.

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<sup>21</sup> <https://www.informador.mx/entretenimiento/Manolo-Caro-la-mente-detras-de-La-Casa-de-las-Flores-20180806-0138.html>

<sup>22</sup> <https://tv.parrotanalytics.com/MX/la-casa-de-las-flores-netflix>

PERU: SOCIAL ISSUES AND COMEDY IN FICTION<sup>1</sup>*Authors:*

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**1. Peru's audiovisual context in 2019**

The country's political crisis led to the confrontation between the Peruvian Congress and President Martín Vizcarra on irreconcilable limits. After a second denial of confidence, Vizcarra made use of his constitutional prerogatives and dissolved Congress at the end of September 2019. The majority of the mass media step in line with the different positions of the Executive or the opposition, giving much more attention to the political situation, thus modifying the TV programming.

In this scenario, the Enfoca group – owner of Latina station – has continued looking for potential buyers, but without success yet. The conglomerate – with interest in financial, health and productive sectors – does not feel that the investment made in acquiring all the station's shares seven years ago yielded the expected results. Mean-

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while, Willax – a small locally held station acquired by the Wong group in 2015 with promises of a large investment – has become a stronghold of opposition to the government of Vizcarra and the largest broadcaster of Korean fictions. In February 2020, they announced that a commercial partnership had been signed with South Korean company CJ ENM, a production company of several Korean dramas and the award-winning film *Parasite*, but without indicating what this company could mean for audiovisual production in Peru.

A fact that affected emotionally the television community was Ofelia Lazo's death. The actress played multiple characters in Peruvian fictions, although she was always remembered for her role as Natacha, in the 1970 Peruvian homonymous telenovela.

## 1.1. Open TV in Peru

**Chart 1. National broadcasting networks/stations in Peru**

Private networks/stations (5)	Public networks/stations (1)
Latina (channel 2)	TV Perú (channel 7)
América Televisión (channel 4)	
Panamericana Televisión (channel 5)	
ATV (channel 9)	
Global Televisión* (channel 13)	
<b>TOTAL NETWORKS = 6</b>	
<b>TOTAL STATIONS = 6</b>	

\*Until November 30, 2019, it was called América Next.

Source: Observatorio Audiovisual Peruano (OAP)

There have not been major changes in ownership or grouping of broadcasting stations with national coverage. As in previous years, the only company showing changes is the one that broadcasts on channel 13 in Lima, which is a subsidiary of ATV and has undergone countless changes in management and names, changing from América Next to Global Televisión in December 2019. This measure avoids brand and identity positioning of this station, always finishing in the last places of audience.

Another major change was the dismissal of Hugo Coya as director of TV Perú, the state-owned station, in December 2019, which caused surprise and rejection in part of the population. Coya is seen as the main responsible for positive changes in the state-owned station, including shows in native languages, a youth's slot, and production agreements with European stations (see Obitel Yearbooks 2018 and 2019). The rejection had been such that a few days later Francisco Petrozzi, the minister of Culture – who had dismissed Coya – resigned office.

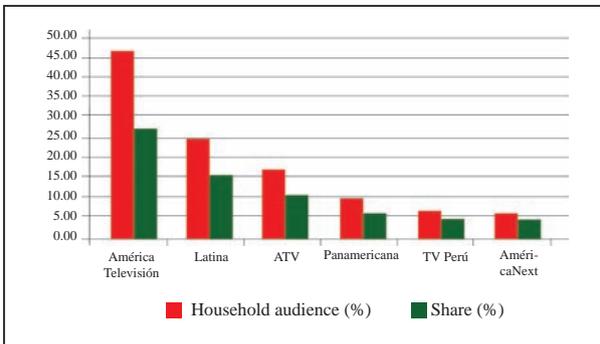
Although no new fiction projects have been announced in TV Perú – whose historical miniseries *El Último Bastión* won several awards –, the station broadcasted the Argentinian telenovela *Golpe al Corazón* in the evenings. Its central theme is organ donation, which marks that, despite being a mainly informative station, it still dedicates some space to fiction when it has some social content.

**Graph 1. TV audience and share by network**

Station	Household audience	Audience (%)	Share (%)
América Televisión	8.92	45.1	25.7
Latina	4.53	22.9	13.1
ATV	3.06	15.5	8.8
Panamericana Televisión	1.56	7.9	4.5
TV Perú	0.86	4.3	2.5
Global Televisión	0.85	4.3	2.4
<b>TOTAL</b>	<b>19.78</b>	<b>100</b>	<b>57</b>

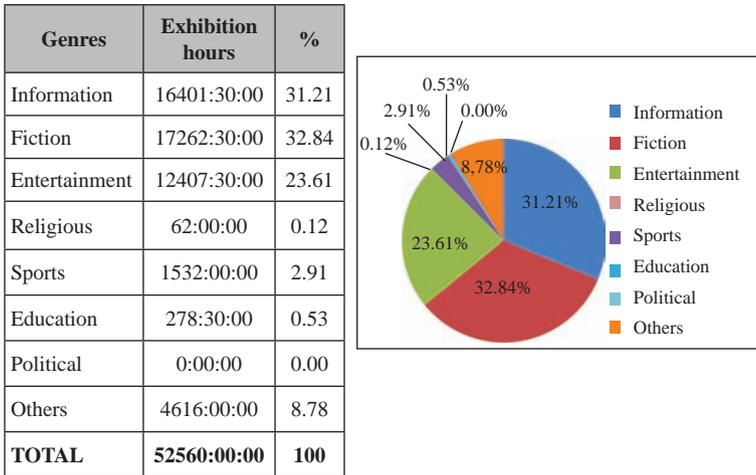
\* Share does not add 100% because it lacks all other broadcasting stations, cable and VHS/DVD.

Source: Observatorio Audiovisual Peruano (OAP) and Kantar Ibope Media



The declining audience trend shows a certain brake in 2019, since the share of households reached 57 points in the six stations we observed – an increase of 2.2 compared to 2018, although it is still below previous years. América Televisión continues its upward trend in household audiences, while its competitors show setbacks. The most notorious case is Latina, which for the fifth consecutive year shows an audience fall, while ATV, its main competitor, achieved in 2019 a slight uptick in its share, which, although in a very marginal fashion, slows its declining trend from the previous years. TV Perú remains at very marginal levels, but for the station they are significant numbers. While in 2019 Global Televisión (as América Next) shows a slight improvement, a new change of administration – as above-mentioned – predicts that it will remain in the last place for another year.

**Graph 2. Genres and hours broadcasted on TV programming**



Source: Observatorio Audiovisual Peruano (OAP)

The most remarkable aspect is the drastic drop in the fiction percentage. In 2018, it showed a slight setback, but levels in 2019 were not seen in the entire decade. Many fiction shows are reprises, and the broadcast of national premiere shows is almost exclusive

of América Televisión, which is also the station that premieres the most foreign fictions (see Table 1). Fiction time slots on certain stations were replaced by telesales and infomercials, which caused shows classified as “Others” to jump to more than double compared to the previous year.

Information and sports are other percentages whose variation is remarkable. The first one had a slight rise, which reverses a declining trend in recent years, since political conflicts promoted information presence in 2019, the same year of Pan American Games held in Lima, leading to a great interest in sports other than football. Latina announced it had acquired the broadcast rights to the event, but it eventually dedicated brief spaces to it. Facing this situation, TV Perú made live broadcast of different sports disciplines several days. However, the number of hours of sports shows a drop of more than 400 hours compared to 2018, which are specifically the ones that increased the previous year, when Peruvian TV broadcasted the national football team in the World Cup 2018 after 36 years of absence in this competition.

## 1.2. Pay TV

Pay TV offer in Peru showed no significant changes in 2019. Movistar remains as the leader in customers, followed by companies Claro TV and DirecTV. Towards the end of 2019, Movistar attempted to unilaterally modify the conditions and costs of the services, provoking broad rejection of users and being eventually forced by the State to reverse it, return improper collections and pay a fine.

What was interesting is that Movistar Play platform offered during 2019 three Peruvian fictions, exclusive to its online platform – *Un Día Eres Joven*, *El Día de mi Suerte* and *Doña Teta* (see Table 6) –, at a time when Telefónica also announced it would sell its operations in most Latin American countries, causing surprise in the region.

Another novelty of this operator to the end of the year was the addition of two stations whose main productions are fictions from

India (Zee) and Turkey (Kanal D Drama), responding to the long tradition of a consumer audience of Bollywood films, and the success of Turkish telenovelas on recent years.

Platforms such as Netflix and Amazon still offer their services, with similar or identical programming to several Latin American countries. Besides, Disney+ and Universal are expected to offer their services by 2020.

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

CPI company published advertising investment data of the last five years. According to these data, in 2019 it registered its third consecutive annual fall. Investment reached 583 million dollars, collection which represents 6% less compared to 2018. Television is still the means of the highest, although its decline from 2016 seems unstoppable. That year, advertising investment on television represented 50.8%, falling to 47.9% in 2017 and 45.8% in 2018. For 2019, the participation of television in advertising investment means 42.9%, according to data published by CPI. Conversely, Internet is the one that grows the most: in 2015, it had a 10.8% participation – being ranked third, after television and newspapers, and almost tying with radio – and in 2019 it had a 19.9% participation, well above radio and newspapers.

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

Peruvian fiction continued working on social merchandising including current social problems into their themes. In the 2019 yearbook, we highlighted the importance of issues such as sexual harassment and human trafficking in several of the broadcasted fictions. This trend continued and went a step further by making the rape of a young woman as the central theme of the telenovela *En la Piel de Alicia*. The plot poses different scenarios of who could be the culprit – the victim has no memories of the assault because she had been drugged and beaten – and the different motivations that potential offenders would have in a sexist society like Peru.

The novela *Chapa tu Combi* also addressed issues of direct national relevance, inserting social and political problems of Peru as central elements of its narrative. We expand on this issue in sections 4 and 5 of this chapter.

The most interesting campaign in terms of social merchandising occurred when two stories were put together to promote organ donation. Towards the end of *Ojitos Hechiceros 2*, the character Yair is killed, and it is discovered that he was an organ donor. In the telenovela *Señores Papis*, the character Lorenzo needs a new kidney to survive. The two stories are unified by the doctor who takes care of Yair in his final moments of life and who gives the news to Lorenzo of having found a donor, saving his life. This campaign<sup>2</sup>, promoted by the Ministry of Health, used the popularity of both telenovelas, helping to raise awareness in the population about the importance of accepting to be organ donors, achieving a 200% increase in donations in the following weeks.

## 1.5. Communication policies

The most important decision regarding digital terrestrial television (DTT) in Peru is the new postponement for the so-called analog blackout. Peru has divided the territory into five sectors, where the blackout will take place progressively. For sector 1, which includes Lima and Callao, the date had been initially postponed until 2019, and then it was again postponed until the end of 2020; but in December 2019, the government decided to postpone the date until the end of 2022, indicating that more than 68% of users were not aware of what DTT is. This postponement coincided with an advertising campaign in the media on digital television and the possibility of watching it even on analog televisions thanks to the use of set-top box.

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<sup>2</sup> [https://www.youtube.com/watch?v=Jdma6BEs-rs&feature=emb\\_err\\_watch\\_on\\_yt](https://www.youtube.com/watch?v=Jdma6BEs-rs&feature=emb_err_watch_on_yt)

On the other hand, in June 2019 it was announced that the Peruvian Tax Administration Office (Sunat) was preparing a proposal to collect the General Sales Tax from digital applications – among which is Netflix –, causing protests from the owners of this platform. In December, it was announced that the laws were ready, but, since the Congress is closed, it must wait until the installation of the new Congress to present them.

## **1.6. Digital and mobile infrastructure**

According to a study carried out by Kantar Ibope, Peruvians spend an average of 3 hours and 13 minutes watching TV per day. The interesting thing about this study is that it indicates that its use has increased on different screens, not only on the television set – still the main way of watching television. The use of two screens to watch television rose 18% between 2016 and 2019 (from 61% to 79%), while the use of television on three screens increased from 45% to 48% in the same years. This is a slow but constant introduction of television consumption on other screens – smartphones, tablets, computers, etc. –, although without abandoning the traditional form of consumption on TV sets. The study also shows that the exclusive consumption of other platforms – such as Netflix – is still low in Peru, reaching only 4% of the people analyzed in the study.

The webseries seem to lower their production rate, and the number of titles released this year is quite less compared to previous years. The Peruvian film *Aj! Zombies* was released in October, based on the successful webseries of the year 2014 (see *Obitel Yearbook 2015*), whose episodes were remade. Although it did not reach to be among the top ten most viewed national films, it reached more than 25 thousand viewers, and a second part is rumored.

## **1.7. Independent production companies**

Del Barrio Producciones is still the largest independent production company of Peruvian fiction. In early 2020, the company announced the hiring of Hugo Coya as the new general manager, after

he left the state-owned station (see section 1.1). Del Barrio seeks in this way to increase its internationalization and jump to platforms such as Netflix or Amazon with its productions. To its fictions already sold outside Peru, the company has added *Solo una Madre*, which was exported in July to Ecuador.

Likewise, the film production company Tondero announced its alliance with América Televisión to co-produce various shows thinking of the international market. This alliance will allow Tondero to use the facilities of América Televisión built in Pachacamac (see Obitel Yearbook 2016), and for the television station it means the possibility of entry of its productions to Netflix, where several Tondero productions are available.

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

**Table 1. Fictions broadcasted in 2019 (national and imported; premieres and reruns; and co-productions)**

<b>PREMIERE NATIONAL TITLES – 8</b>	<b>RERUNS – 110</b>
<p><b>América Televisión – 6</b></p> <ol style="list-style-type: none"> <li>1. <i>De Vuelta al Barrio</i> (soap opera)</li> <li>2. <i>Chapa tu Combi</i> (telenovela)</li> <li>3. <i>En la Piel de Alicia</i> (telenovela)</li> <li>4. <i>Los Vílchez</i> (telenovela)</li> <li>5. <i>Ojitos Hechiceros 2</i> (telenovela)</li> <li>6. <i>Señores Papis</i> (telenovela)</li> </ol> <p><b>TV Perú – 2</b></p> <ol style="list-style-type: none"> <li>7. <i>El Último Bastión</i> (miniseries)</li> <li>8. <i>La Huaca de Cartón</i> (series)</li> </ol> <p><b>PREMIERE FOREIGN TITLES – 16</b></p> <p><b>América Televisión – 8</b></p> <ol style="list-style-type: none"> <li>1. <i>La Rosa de Guadalupe</i> (series – Mexico)</li> <li>2. <i>Cita a Ciegas</i> (telenovela – Mexico)</li> <li>3. <i>Doña Flor y sus Dos Maridos</i> (telenovela – Mexico)</li> <li>4. <i>Me Declaro Culpable</i> (telenovela –</li> </ol>	<p><b>América Televisión – 14</b></p> <ol style="list-style-type: none"> <li>1. <i>El Chavo del Ocho</i> (series – Mexico)</li> <li>2. <i>La Rosa de Guadalupe</i> (series – Mexico)</li> <li>3. <i>La Gata</i> (telenovela – Mexico)</li> <li>4. <i>Cita a Ciegas</i> (telenovela – Mexico)</li> <li>5. <i>Doña Flor y sus Dos Maridos</i> (telenovela – Mexico)</li> <li>6. <i>Me Declaro Culpable</i> (telenovela – Mexico)</li> <li>7. <i>Mi Marido Tiene Familia</i> (telenovela – Mexico)</li> <li>8. <i>Mi Marido Tiene Más Familia</i> (telenovela – Mexico)</li> <li>9. <i>Ringo</i> (telenovela – Mexico)</li> <li>10. <i>Tenías que Ser Tú</i> (telenovela – Mexico)</li> <li>11. <i>Solamente Milagros</i> (series – Peru)</li> <li>12. <i>De Vuelta al Barrio</i> (soap opera – Peru)</li> <li>13. <i>Al Fondo Hay Sitio</i> (soap opera– Peru)</li> <li>14. <i>Amores que Matan</i> (series – Peru)</li> </ol>

<p>Mexico)</p> <p>5. <i>Mi Marido Tiene Familia</i> (telenovela – Mexico)</p> <p>6. <i>Mi Marido Tiene Más Familia</i> (telenovela – Mexico)</p> <p>7. <i>Ringo</i> (telenovela – Mexico)</p> <p>8. <i>Tenías Que Ser Tú</i> (telenovela – Mexico)</p> <p><b>ATV – 3</b></p> <p>9. <i>Querer sin Límites</i> (telenovela – Brazil)</p> <p>10. <i>Amar a Muerte</i> (telenovela – Mexico, United States)</p> <p>11. <i>Abismo de Pasión</i> (telenovela – Mexico)</p> <p><b>Latina – 3</b></p> <p>12. <i>Heidy</i> (telenovela – Argentina)</p> <p>13. <i>Perseguidos</i> (telenovela – Mexico)</p> <p>14. <i>Perdona Nuestros Pecados</i> (telenovela – Chile)</p> <p><b>Global – 1</b></p> <p>15. <i>Antes Muerta Que Lichita</i> (telenovela – Mexico)</p> <p><b>Panamericana Televisión – 1</b></p> <p>16. <i>Dama y Obrero</i> (telenovela – United States)</p>	<p><b>ATV – 23</b></p> <p>15. <i>Historias de Sexo de Gente Común</i> (series – Argentina)</p> <p>16. <i>Mujeres Asesinas</i> (series – Argentina)</p> <p>17. <i>El Amor No Tiene Precio</i> (telenovela – Mexico, United States)</p> <p>18. <i>El Chapulín Colorado</i> (series – Mexico)</p> <p>19. <i>Chespirito</i> (series – Mexico)</p> <p>20. <i>Como Dice el Dicho</i> (series – Mexico)</p> <p>21. <i>Mujer, Casos de la Vida Real</i> (series – Mexico)</p> <p>22. <i>Lo Que Callamos las Mujeres</i> (series – Mexico)</p> <p>23. <i>Teresa</i> (telenovela – Mexico)</p> <p>24. <i>Amor Bravío</i> (telenovela – Mexico)</p> <p>25. <i>Corazón Indomable</i> (telenovela – Mexico)</p> <p>26. <i>Destilando Amor</i> (telenovela – Mexico)</p> <p>27. <i>Un Refugio para el Amor</i> (telenovela – Mexico)</p> <p>28. <i>Amores Verdaderos</i> (telenovela – Mexico)</p> <p>29. <i>Cuidado con el Ángel</i> (telenovela – Mexico)</p> <p>30. <i>Mi Destino Eres Tú</i> (telenovela – Mexico)</p> <p>31. <i>Pasión y Poder</i> (telenovela – Mexico)</p> <p>32. <i>Un Lugar en tu Corazón</i> (telenovela – Mexico)</p> <p>33. <i>Viva los Niños</i> (telenovela – Mexico)</p> <p>34. <i>Alborada</i> (telenovela – Mexico)</p> <p>35. <i>Amor Real</i> (telenovela – Mexico)</p> <p>36. <i>Lo Imperdonable</i> (telenovela – Mexico)</p> <p>37. <i>Pasión</i> (telenovela – Mexico)</p> <p><b>Global – 33</b></p> <p>38. <i>Los Canarios</i> (series – Colombia)</p> <p>39. <i>La Teacher de Inglés</i> (telenovela – Colombia)</p> <p>40. <i>Pocholo</i> (telenovela – Colombia)</p> <p>41. <i>Lo que la Gente Cuenta</i> (series – Mexico)</p> <p>42. <i>El Chavo</i> (series – Mexico)</p> <p>43. <i>Chespirito</i> (series – Mexico)</p> <p>44. <i>La Familia Peluche</i> (series – Mexico)</p> <p>45. <i>Vecinos</i> (series – Mexico)</p> <p>46. <i>La Malquerida</i> (telenovela – Mexico)</p> <p>47. <i>Locura de Amor</i> (telenovela – Mexico)</p> <p>48. <i>Rosa Salvaje</i> (telenovela – Mexico)</p>
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	<p>49. <i>Yo No Creo en los Hombres</i> (telenovela – Mexico)</p> <p>50. <i>El Premio Mayor</i> (telenovela – Mexico)</p> <p>51. <i>La Fea Más Bella</i> (telenovela – Mexico)</p> <p>52. <i>Baila Reggaeton</i> (miniseries – Peru)</p> <p>53. <i>La Reina de las Carretillas</i> (miniseries – Peru)</p> <p>54. <i>Mi Amor el Wachiman 2</i> (miniseries – Peru)</p> <p>55. <i>Mi Amor el Wachiman 3</i> (miniseries – Peru)</p> <p>56. <i>Rita y Yo</i> (miniseries – Peru)</p> <p>57. <i>Rita y Yo y Mi otro Yo</i> (miniseries – Peru)</p> <p>58. <i>Sally la Muñequita del Pueblo</i> (miniseries – Peru)</p> <p>59. <i>Vacaciones en Grecia</i> (miniseries – Peru)</p> <p>60. <i>Yo No Me Llamo Natacha 2</i> (miniseries – Peru)</p> <p>61. <i>Amores que Matan</i> (series – Peru)</p> <p>62. <i>Así es la Vida</i> (soap opera – Peru)</p> <p>63. <i>La AKdemia</i> (series – Peru)</p> <p>64. <i>Cholo Power</i> (telenovela – Peru)</p> <p>65. <i>Mis Tres Marías</i> (telenovela – Peru)</p> <p>66. <i>Mujercitas</i> (telenovela – Peru)</p> <p>67. <i>Solamente Milagros</i> (telenovela – Peru)</p> <p>68. <i>Solo una Madre</i> (telenovela – Peru)</p> <p>69. <i>Valiente Amor</i> (telenovela – Peru)</p> <p>70. <i>Amor de Madre</i> (telenovela – Peru)</p> <p><b>Latina – 15</b></p> <p>71. <i>La Mujer en el Espejo</i> (telenovela – Colombia)</p> <p>72. <i>Hasta que te Conocí</i> (series – United States, Mexico)</p> <p>73. <i>Mirada de Mujer</i> (telenovela – Mexico)</p> <p>74. <i>Camino a Casa</i> (miniseries – Peru)</p> <p>75. <i>Diablos Azules</i> (miniseries – Peru)</p> <p>76. <i>El Gran Reto</i> (miniseries – Peru)</p> <p>77. <i>Fuerza Fénix</i> (miniseries – Peru)</p> <p>78. <i>Guerreros de Arena</i> (miniseries – Peru)</p> <p>79. <i>Lobos de Mar</i> (miniseries – Peru)</p> <p>80. <i>Los Del Barrio</i> (miniseries – Peru)</p> <p>81. <i>Néctar en el Cielo</i> (miniseries – Peru)</p> <p>82. <i>Sabrosas</i> (miniseries – Peru)</p> <p>83. <i>Chapulín el Dulce</i> (miniseries – Peru)</p> <p>84. <i>Comando Alfa</i> (series – Peru)</p>
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	<p>85. <i>Escándalo</i> (telenovela – Peru)</p> <p><b>Panamericana Televisión – 22</b></p> <p>86. <i>Las Muñecas de la Mafia</i> (series – Colombia)</p> <p>87. <i>Bella Calamidades</i> (telenovela – Colombia)</p> <p>88. <i>Los Herederos del Monte</i> (telenovela – Colombia)</p> <p>89. <i>La Patrona</i> (telenovela – United States)</p> <p>90. <i>La Reina del Sur</i> (telenovela – United States)</p> <p>91. <i>Pecados Ajenos</i> (telenovela – United States)</p> <p>92. <i>La Viuda de Blanco</i> (telenovela – United States)</p> <p>93. <i>José José, el Príncipe de la Canción</i> (telenovela – United States)</p> <p>94. <i>Dame Chocolate</i> (telenovela – United States)</p> <p>95. <i>Mujeres Rompiendo el Silencio</i> (series – Mexico)</p> <p>96. <i>Pobre Diabla</i> (telenovela – Mexico)</p> <p>97. <i>Marina</i> (telenovela – Mexico)</p> <p>98. <i>1000 Oficios</i> (soap opera – Peru)</p> <p>99. <i>Esposos pero Tramposos</i> (series – Peru)</p> <p>100. <i>Carita de Atún</i> (series – Peru)</p> <p>101. <i>Confesiones</i> (series – Peru)</p> <p>102. <i>La Paisana Jacinta</i> (series – Peru)</p> <p>103. <i>Paquete y Camote, Aventura de Navidad</i> (telenovela – Peru)</p> <p>104. <i>Pataclaun</i> (series – Peru)</p> <p>105. <i>Clave Uno, Médicos en Alerta</i> (series – Peru)</p> <p>106. <i>Las Virgenes de la Cumbia</i> (miniseries – Peru)</p> <p>107. <i>Somos Family</i> (series – Peru)</p> <p><b>TV Perú – 3</b></p> <p>108. <i>Conversando con la Luna</i> (miniseries – Peru)</p> <p>109. <i>El Último Bastión</i> (miniseries – Peru)</p> <p>110. <i>Nuestra Historia</i> (telenovela – Peru)</p> <p><b>TOTAL PREMIERE TITLES: 24</b>  <b>TOTAL RERUNS: 110</b>  <b>TOTAL BROADCASTED TITLES: 134</b></p>
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Source: Observatorio Audiovisual Peruano (OAP)

Despite a similar total of broadcasted titles compared to 2018, there is a noticeable reduction of Obitel premiere fictions on the national stations. This reduction impacts in two ways. In 2019, with only 16 premiere titles from other Obitel countries, there was a drop of almost 40% compared to 2018. Peruvian premieres also show the lowest figure registered in the tracing carried out on broadcasting since 2012 in Peru. América Televisión, which has the most premieres, falls quantitatively to a historic low in the aforementioned period.

The reruns, on the other hand, have increased their participation in the six monitored stations. Global has sustained its fictional content based on what its allied station, América Televisión, provided. A similar situation happened to Panamericana Televisión, which benefitted from its alliance with Latina.

**Table 2. Premiere fiction in 2019: countries of origin**

Country	Titles	%	Chapters/ episodes	%	Hours	%
<b>NATIONAL (total)</b>	<b>8</b>	<b>33.3</b>	<b>560</b>	<b>29.1</b>	<b>559:30:00</b>	<b>28.9</b>
<b>OBITEL COUNTRIES (total)</b>	<b>15</b>	<b>62.5</b>	<b>1270</b>	<b>66.0</b>	<b>1285:00:00</b>	<b>66.4</b>
Argentina	1	4.2	18	0.9	18:00:00	0.9
Brazil	1	4.2	134	7.0	141:00:00	7.3
Chile	1	4.2	74	3.8	74:30:00	3.8
Colombia	0	0.0	0	0.0	0:00:00	0.0
Spain	0	0.0	0	0.0	0:00:00	0.0
United States (Hispanic production)	1	4.2	36	1.9	36:00:00	1.9
Mexico	11	45.8	1008	52.4	1015:30:00	52.5
Peru	8	33.3	560	29.1	559:30:00	28.9
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>4.2</b>	<b>93</b>	<b>4.8</b>	<b>91:00:00</b>	<b>4.7</b>
Peruvian co-productions	0	0.0	0	0.0	0:00:00	0.0
Co-productions between Obitel countries	1	0.0	93	0.0	91:00:00	0.0
<b>GENERAL TOTAL</b>	<b>24</b>	<b>100.0</b>	<b>1923</b>	<b>100.0</b>	<b>1935:30:00</b>	<b>100.0</b>

Source: Observatorio Audiovisual Peruano (OAP)

Table 2 reflects the significant reduction that we previously confirmed. In 2019, only 24 premiere fictions were offered, almost half of the 46 found in 2018. Although the number of Obitel countries with fictions displayed in Peru remains unchanged, there are cases to highlight. First, the consistency of Mexican productions. Chile is present with *Perdona Nuestros Pecados* and replaces Colombia, which, after many years, is no longer in this list. Finally, the considerable decline of Brazilian fictions in our territory: only one last year compared to the 11 titles in 2018.

Despite this reduction, the variety of Ibero-American formats has remained unchanged, with telenovelas in the lead. In the case of Peru, although the telenovela is also the most offered format, the presence of the soap opera for several years is also remarkable. First with *Al Fondo Hay Sitio* and now with *De Vuelta al Barrio*.

**Table 3. Formats of national and Ibero-American fiction**

Format	National						Ibero-American					
	Titles	%	C/E	%	H	%	Title	%	C/E	%	H	%
Telenovela	5	62.5	332	59.3	331:30:00	59.2	15	93.8	1059	77.8	1109:30:00	78.0
Series	1	12.5	14	2.5	14:00:00	2.5	1	6.3	302	22.2	313:00:00	22.0
Miniseries	1	12.5	34	6.1	34:00:00	6.1	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.)	1	12.5	180	32.1	180:00:00	32.2	0	0.0	0	0.0	0:00:00	0.0
<b>Total</b>	<b>8</b>	<b>100.0</b>	<b>560</b>	<b>100.0</b>	<b>559:30:00</b>	<b>100.0</b>	<b>16</b>	<b>100.0</b>	<b>1361</b>	<b>100.0</b>	<b>1422:30:00</b>	<b>100.0</b>

Source: Observatorio Audiovisual Peruano (OAP)

**Table 4. The ten most watched titles on open television**

	Title	Country of the original idea or script	Station	Format/genre	N. of chap./ ep. (in 2019)	Time slot	Rating	Share
1	<i>De Vuelta al Barrio</i>	Peru	América Televisión	Soap opera/ comedy	180	Prime time	24.7	37.1
2	<i>Señores Papis</i>	Peru	América Televisión	Telenovela/ comedy	84	Prime time	22.9	35.8
3	<i>En la Piel de Alicia</i>	Peru	América Televisión	Telenovela/ melodrama	82	Prime time	22.7	34.4
4	<i>Los Vilchez</i>	Peru	América Televisión	Telenovela/ comedy	70	Prime time	22.0	34.6
5	<i>Ojitos Hechiceros 2</i>	Peru	América Televisión	Telenovela/ melodrama	62	Prime time	21.4	34.5
6	<i>Chapa tu Combi</i>	Peru	América Televisión	Telenovela/ melodrama	34	Prime time	20.6	32.2
7	<i>La Rosa de Guadalupe</i>	Mexico	América Televisión	Telenovela/ melodrama	302	Afternoon	18.6	32.8
8	<i>Mi Marido Tiene Familia</i>	Mexico	América Televisión	Telenovela/ comedy	123	Afternoon	7.9	18.8
9	<i>Ringo</i>	Mexico	América Televisión	Telenovela/ melodrama	83	Morning	6.8	21.5
10	<i>Amar a Muerte</i>	Mexico/ United States	ATV	Telenovela/ melodrama	93	Prime time	5.8	9.4
<b>Total productions: 10</b>			<b>Foreign scripts: 4</b>					
100%			40%					

Source: Observatorio Audiovisual Peruano (OAP) and Kantar Ibope Media

**Table 4a. The eight most watched national titles on open television**

	Title	Country of the original idea or script	Station	Format/genre	N. of chap./ ep. (in 2019)	Time slot	Rating	Share
1	<i>De Vuelta al Barrio</i>	Peru	América Televisión	Soap opera/ comedy	180	Prime time	24.7	37.1
2	<i>Señores Papis</i>	Peru	América Televisión	Telenovela/ comedy	84	Prime time	22.9	35.8
3	<i>En la Piel de Alicia</i>	Peru	América Televisión	Telenovela/ melodrama	82	Prime time	22.7	34.4
4	<i>Los Vilchez</i>	Peru	América Televisión	Telenovela/ comedy	70	Prime time	22.0	34.6
5	<i>Ojitos Hechiceros 2</i>	Peru	América Televisión	Telenovela/ melodrama	62	Prime time	21.4	34.5
6	<i>Chapa tu Combi</i>	Peru	América Televisión	Telenovela/ melodrama	34	Prime time	20.6	32.2

7	<i>El Último Bastión</i>	Peru	TV Perú	Miniseries/ melodrama	34	Prime time	1.8	2.9
8	<i>La Huaca de Cartón</i>	Peru	TV Perú	Series/ children's	14	Mor- ning	0.9	2.5
<b>Total productions: 8</b>				<b>Foreign scripts: 0</b>				
100%				0%				

Source: Observatorio Audiovisual Peruano (OAP) and Kantar Ibope Media

Tables 4 and 4a show the preference of the Peruvian audience for fictions made in our country. They take the first six positions in the top ten, maintaining a constant hegemony for several years broadcasting all in prime time. They belong to América Televisión, the most important station in terms of audience. One genre, comedy, stands out this year among the first places. *De Vuelta al Barrio*, the comic soap opera set in the 1970s, takes the top of the table for the first time in its third season. *Señores Papis*, a national version of the homonymous Argentinian telenovela, places comedy in second position. *Los Vilchez*, in its first season, nuances a strong dose of comedy with melodrama and occupies the fourth position. Precisely, the most traditional melodramas appear only in third position with *En la Piel de Alicia*. The second season of *Ojitos Hechiceros* takes the fifth position, and *Chapa tu Combi* closes the Peruvian presence in the top ten. The last positions, which correspond to Mexican fictions, maintain their slot. *La Rosa de Guadalupe*, which is projected in a better position every time, is also a source of premieres and constant reruns in América Televisión; hence its high number of broadcast episodes. The last remarkable thing is the presence of ATV with the telenovela *Amar a Muerte*, once this station had been out of the top ten since 2015. Its presence here displaces the continuity of Latina in this list.

In Table 4a, for the first time since 2012, we have been facing a discouraging scenario in terms of Peruvian premiere fictions, since we did not reach ten titles as usual. It is important to indicate that TV Perú has been making some fictions different from what we usually find in América Televisión: *El Último Bastión*, which is part of TV Perú's plans to commemorate the Bicentennial in 2021, and *La Huaca de Cartón*, a series targeted to children.

**Table 5. Audience profile of the ten most watched titles:  
gender, age, socioeconomic level**

	Title	Station	Gender %		Socioeconomic level %		
			Women	Men	AB	C	DE
1	<i>De Vuelta al Barrio</i>	América Televisión	62.1	37.9	17.9	43.5	38.6
2	<i>Señores Papis</i>	América Televisión	63	37	18.9	41.7	39.4
3	<i>En la Piel de Alicia</i>	América Televisión	62.8	37.2	16.2	43.7	40.2
4	<i>Los Vílchez</i>	América Televisión	63.8	36.2	19	45	36
5	<i>Ojitos Hechiceros 2</i>	América Televisión	63.9	36.1	19.1	43.6	37.3
6	<i>Chapa tu Combi</i>	América Televisión	64	36	17.8	42.1	40.1
7	<i>La Rosa de Guadalupe</i>	América Televisión	66.9	33.1	16.4	43.5	40.1
8	<i>Mi Marido Tiene Familia</i>	América Televisión	33.4	66.6	16.3	43.0	40.7
9	<i>Ringo</i>	América Televisión	36.0	64.0	14.0	42.8	43.1
10	<i>Amar a Muerte</i>	ATV	31.6	68.4	14.5	33.5	52.1

	Title	Station	Age range %					
			3-10	11-17	18-25	26-37	38-49	50-99
1	<i>De Vuelta al Barrio</i>	América Televisión	14.0	14.3	11.9	21.1	16.8	21.9
2	<i>Señores Papis</i>	América Televisión	12.7	15.8	12.4	21.3	18.5	19.4
3	<i>En la Piel de Alicia</i>	América Televisión	13.2	14.0	12.3	21.2	18.2	21.2
4	<i>Los Vílchez</i>	América Televisión	14.2	16.5	12.3	21.6	15.9	19.5
5	<i>Ojitos Hechiceros 2</i>	América Televisión	13.8	15.5	11.8	21.8	17.1	20.1
6	<i>Chapa tu Combi</i>	América Televisión	14.2	13.7	12.6	21.6	17.5	20.3
7	<i>La Rosa de Guadalupe</i>	América Televisión	14.6	15	10.9	20.7	16.2	22.6
8	<i>Mi Marido Tiene Familia</i>	América Televisión	13.7	13.7	15.7	21.9	13.6	21.4
9	<i>Ringo</i>	América Televisión	5.8	11.3	13.6	27.2	18.0	24.1
10	<i>Amar a Muerte</i>	ATV	11.1	7.3	9.6	13.4	16.3	42.2

Source: Observatorio Audiovisual Peruano (OAP) and Kantar Ibope Media

Although the television audience had emerged as eminently female, in 2019 there are particular results in the last places in the top ten, since they have a mostly male audience. The cases of *Ringo* and *Amar a Muerte* can be understood from the portrait of male actors in violent or revenge settings. These fictions also break the socio-economic trend of an audience predominantly in sector C, since it is in sector D where these two productions achieve greater audience.

Finally, people aged 26 to 37 mostly watch the top ten fictions. However, there are some cases in which the range of 50 years old or more becomes more important. In the case of *De Vuelta al Barrio*, the reason can be the fact that this soap opera is portrayed in the 1970s. Perhaps in *La Rosa de Guadalupe* the reason is the religious conservatism in its stories, and in *Amar a Muerte*, the themes of reincarnation and the search for justice.

### 3. VoD monitoring

#### 3.1. VoD in Peru

Chart 2. VoD in Peru

	Platforms	Total
<b>VoD linked to open TV stations</b>	América TVGO, Latina Play, ATV Play, TV Perú App, Panamericana App, Willax YouTube*	<b>6*</b>
<b>VoD linked to pay TV stations</b>	HBO Go, Fox Play, Fox Latinoamérica (App), Fox Sports (App), ESPN Play, Movistar Plus YouTube**	<b>6</b>
<b>VoD linked to telecommunication companies</b>	Claro Video, Movistar Play, DirecTV, Fútbol Movistar	<b>4</b>
<b>VoD without links to TV networks</b>	Netflix, Amazon, Apple TV, Instagram TV	<b>4</b>
<b>GENERAL TOTAL</b>		<b>20</b>

\* Each station has a long list of platforms. Therefore, the main platform of each station was included here, where most of its material is found.

\*\* It is not all the content of the station. Access to this station is free, but it was placed here as part of Movistar pay service.

Source: Observatorio Audiovisual Peruano (OAP)

In summary, the situation of VoD platforms available in our country has not changed since 2018.

### 3.2. Earnings from VoD systems

In Peru, there are no complete public figures regarding earnings from VoD systems, although there are estimates of what the general growth of VoD systems would be in the future. A projection study for the period 2019-2023 carried out by the consulting firm PwC indicates that streaming services in Peru would have a 19% growth in revenue, compared to an 1.16% increase in traditional television during the same period. This 19% would place Peru as the second country in the region in terms of percentage increase in income after Argentina (22.87%) and before Brazil (15.72%).<sup>3</sup> CPI shows that Netflix and its presence in households in Lima metropolitan area has sustained a growth of 17.4% in 2017, 28.2% in 2018 and 37.7% in 2019.<sup>4</sup>

### 3.3. VoD analysis in 2019: national and Ibero-American premiere fiction

**Table 6. National and Ibero-American fiction broadcasted on VoD in 2019**

Premiere national titles	Premiere Ibero-American titles	Co-productions
<b>Movistar Play – 3</b> 1. <i>Un Día Eres Joven</i> (series) 2. <i>El Día de mi Suerte</i> (series) 3. <i>Doña Teta</i> (series)	<b>Netflix – 22</b> 1. <i>El Final del Paraíso</i> (series – United States) 2. <i>Millenials 2</i> (series – Argentina) 3. <i>El Marginal 3</i> (series – Argentina) 4. <i>Apache</i> (series – Argentina) 5. <i>Las Chicas del Cable 4</i> (series – Spain) 6. <i>Élite 2</i> (series – Spain) 7. <i>Coisa Mais Linda</i> (series – Brazil) 8. <i>Sintonía</i> (series – Brazil) 9. <i>Hernandad</i> (series – Brazil) 10. <i>El Elegido</i> (series – Brazil) 11. <i>Samantha 2</i> (series – Brazil)	<b>Netflix – 2</b> 1. <i>Criminal</i> (miniseries – Spain, France, United Kingdom, Germany) 2. <i>Vientos de Agua</i> (series – Argentina, Spain)  <b>Prime Video – 1 title</b> 3. <i>Hernán</i> (series – Mexico, Spain)

<sup>3</sup> <https://gestion.pe/economia/peru-segundo-pais-mayor-crecimiento-servicio-streaming-region-nndc-273314-noticia/?ref=gesr>

<sup>4</sup> <https://www.cpi.pe/images/upload/paginaweb/archivo/26/201906-NETFLIX.pdf>

	12. <i>Bajo la Mirada de Nadie</i> (series – Brazil) 13. <i>3% 3</i> (series – Brazil) 14. <i>Toy Boy</i> (series – Spain) 15. <i>Altamar</i> (series – Spain) 16. <i>Brigada Costa del Sol</i> (series – Spain) 17. <i>Hache</i> (series – Spain) 18. <i>Días de Navidad</i> (series – Spain) 29. <i>45 Revoluciones</i> (series – Spain) 20. <i>Paquita Salas 3</i> (series – Spain) 21. <i>El Vecino</i> (series – Spain) 22. <i>Las del Hockey</i> (series – Spain) <b>Movistar Play – 8</b> 23. <i>O Doutrinador</i> (series – Brazil) 24. <i>Tu Parte del Trato</i> (series – Argentina) 25. <i>Berko: el Arte de Callar</i> (miniseries – Argentina) 26. <i>Sitiados: Mexico</i> (series – Mexico) 27. <i>El Tigre Verón</i> (miniseries – Argentina) 28. <i>El General Naranjo 1</i> (series – Colombia) 29. <i>El General Naranjo 2</i> (series – Colombia) 30. <i>Otros Pecados</i> (series – Argentina)  <b>Prime Video – 11</b> 31. <i>Homens?</i> (series – Brazil) 32. <i>The Immortals of Brazil</i> (series – Brazil) 33. <i>La Bandida</i> (series – Mexico) 34. <i>Diablo Guardián 2</i> (series – Mexico) 35. <i>Matadero</i> (series – Spain) 36. <i>La Usurpadora</i> (series – Mexico) 37. <i>El Juego de las Llaves</i> (series – Mexico) 38. <i>A Garota da Moto</i> (series – Brazil) 39. <i>Cuna de Lobos</i> (series – Mexico) 40. <i>Chuteira Preta</i> (series – Brazil) 41. <i>Instinto</i> (series – Spain)	
<b>Total: 3</b>	<b>Total: 41</b>	<b>Total: 3</b>
<b>GENERAL TOTAL: 47</b>		

Source: Observatorio Audiovisual Peruano (OAP)

In Table 6, we find an increase in the general total titles of more than 50% compared to 2018, when 30 titles were counted. This is because, in addition to Netflix, Movistar Play and Prime Video were included. At the national level, the scenario is different. There are

only three premiere titles, all of them are short comedies, and the most important is Movistar Play's commitment to produce these first three Peruvian series. What was missed is the presence of América Televisión through América TVGO with some premiere fiction. Its targets for this year were productions of a different nature and the reduction of Mexican titles that were previously in its library.

**Table 7. VoD premiere fiction in 2019: countries of origin**

Country	Titles	%
<b>NATIONAL (total)</b>	<b>3</b>	<b>6.38</b>
<b>OBITEL COUNTRIES (total)</b>	<b>41</b>	<b>87.23</b>
Argentina	7	14.89
Brazil	12	25.53
Chile	0	0
Colombia	2	0
Spain	13	27.66
United States (Hispanic production)	1	2.13
Mexico	6	12.77
Peru	3	6.38
Portugal	0	0
Uruguay	0	0
Venezuela	0	0
<b>CO-PRODUCTIONS (total)</b>	<b>3</b>	<b>6.38</b>
Peruvian co-productions	0	0
Co-productions between Obitel countries	3	6.38
<b>GENERAL TOTAL</b>	<b>47</b>	<b>100.00</b>

Source: Observatorio Audiovisual Peruano (OAP)

The predominance of fictions from Spain, Brazil, Argentina and Mexico within the total offer is clear. Colombia and the United States maintained the number of titles; only Peru regressed in terms of production.

**Table 8. Formats of national and Ibero-American fiction on VoD**

Format	National				Ibero-American			
	Titles	%	C/E	%	Titles	%	C/E	%
Telenovela	0	0	0	0	0	0.00	0.00	0.00
Series	3	100	21	100	41	93.18	579.00	95.39
Miniseries	0	0	0	0	3	6.82	28.00	4.61

<b>Unitary</b>	0	0	0	0	0	0.00	0.00	0.00
<b>Others</b>	0	0	0	0	0	0.00	0.00	0.00
<b>Total</b>	3	100	21	100	44	100	607	100

Source: Observatorio Audiovisual Peruano (OAP)

In 2019, short stories were preferred. Unlike the previous year, we did not find telenovelas among Ibero-American titles. Likewise, local production was only focused on series and no longer on mini-series.

#### 4. Fiction analysis: open TV, VoD and transmedia expressions in networks

In the Peruvian context, transmedia proposals in fiction are still rare. However, Del Barrio Producciones, the most active national filmmaker in our environment, has been continuously betting on different strategies in its different audiovisual productions. One of its most complete bets was *En la Piel de Alicia*, a telenovela that stages the issue of violence against women. The trigger of the story happens when Alicia is found wounded, beaten and raped. She survived the attack, but with blocked memories. With this story, Del Barrio Producciones began a highly interesting transmedia production strategy. The initial promotion was aimed at generating suspense around what happened to Alicia: was it due to jealousy? Was it a street harassment or a casual and obsessive encounter?<sup>5</sup> In Alicia's case, there were three suspects in the sexual assault: Julián, her ex-boyfriend; Ángel, an upper-class young man who fancied the young woman; and Héctor, the young recycler in love with Alicia.

Peru is a country in which gender violence against women is a pending issue. Between January and December 2019, 168 cases of femicide were registered according to Peru's Human Rights Ombudsperson.<sup>6</sup> To this figure, the 404 femicide attempts and the more

<sup>5</sup> <https://www.youtube.com/watch?v=kxIbR6wH0R0>

<sup>6</sup> <https://cnnespanol.cnn.com/2019/12/30/peru-alcanza-cifra-record-en-femicidios-en-una-decada-estos-son-los-indices-de-femicidios-en-america-latina-en-2019/>

than 18 thousand sexual violations occurred during 2019 are added. It is calculated that ten adolescents – between 12 and 17 years old – are raped every day in Peru, and it is known that the highest incidence of these crimes occurs in Lima. These figures are the highest in the last ten years in the country. It is even more serious because 85% of these cases occur in a relationship context – boyfriends and girlfriends, live-in partners, engaged couples or ex-espouses. Let us remember that violence against women is expressed in economic, physical, sexual and psychological ways.

Violence	Total	Age 0-5	Age 6-11	Age 12-17	Age 18-25	Age 26-35	Age 36-45	Age 46-59	Age 60+
Economic	1024	147	118	91	111	155	110	94	198
Psychological	90235	5577	11024	8613	10339	18720	16839	11654	7469
Physical	72582	3480	6887	7264	14820	18628	12067	6186	3250
Sexual	18044	828	3655	7881	2622	1527	970	404	157
Total	181885	10032	21684	23849	27892	39030	29986	18338	11074

Source: Ministry of Women and Vulnerable Populations of Peru

It is in the context of these figures that Alicia's story was broadcasted. It was offered as one that made visible, in its varied storylines, different forms of violence against women. At the beginning of the story, it was stressed that it was based on real events, although a particular case or situation was never specified. However, the strategies deployed by the production company were different: surveys and opinions on the decisions of the characters about the main plot, Facebook lives, and actors and actresses' recordings talking about the problem. One of the surveys that called for more participation revolved around the decision of Norma – Alicia's mother – to hide the truth about what happened. Data and information were also provided about child sexual abuse.



Source: Del Barrio Producciones

The surveys had good audience response on the two platforms where they were shared: Facebook and Instagram. In this particular survey, it is important to highlight that the majority audience (67%) raised the fact of telling the truth to the young woman as an important step for her recovery.



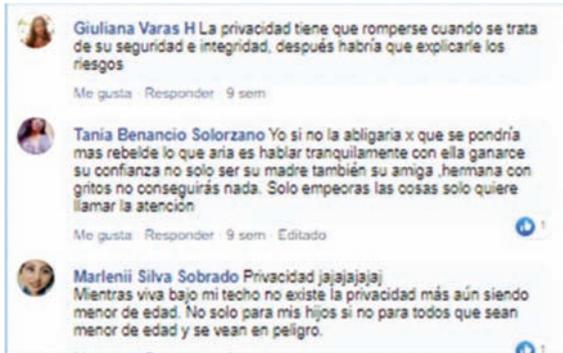
Source: Del Barrio Producciones

One of the dramatic lines highlighted the issue of sexual harassment of women, both adults and young girls. One of the most important moments occurred when Julia – Alicia’s younger sister and Norma’s daughter – shared intimate photos on the internet to someone who called himself “Lobo Alfa” and her mother found out. The production company conducted a survey that had high participation and vote – especially by women – supporting Norma about the request to check the minor’s smartphone.



Source: Del Barrio Producciones

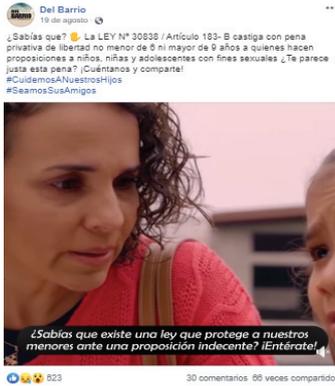
Most of the comments bet on the safety of the young woman and the dangers to which women are exposed in the country. For most women who commented on this survey, the privacy of the young minor did not diminish the mother’s right to act and protect her.



Source: Del Barrio Producciones

The second moment was when information about sexual harassment and family violence laws was posted on Del Barrio Producciones Facebook account. With hashtag #CuidemosANuestro-

sHijos (let's take care of our children), a reality that brings us all together as a society was made visible.



Source: Del Barrio Producciones

However, the most interesting part of the strategy designed by Del Barrio Producciones happened when the interrogations of the three suspects in the sexual attack were streamed on Facebook live. The production company announced the interrogations one by one, and these occurred with live participation of the audience, which could access and participate by making questions. Each live interrogation lasted about an hour, so a selection of each was made for the air broadcast – including questions from the audience.



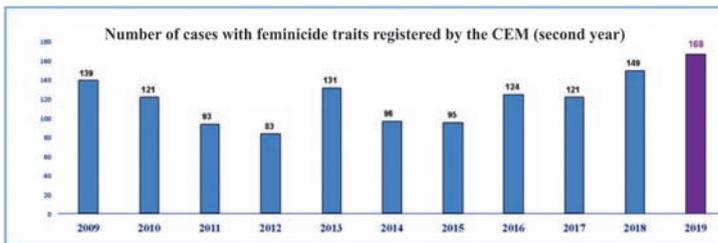
Source: Del Barrio Producciones

The audience highlighted the importance of spreading these messages. The viewers discussed about the case, expressed their opinions and beliefs, and requested to enforce the existing law.



Source: Del Barrio Producciones

One of the greatest achievements of this story was having mobilized opinions about rape and dismantling myths about violence against women. Alicia represents the thousands of Peruvian women who are raped because of their womanhood. Thus, well planned, *En la Piel de Alicia* allowed generating a social conversation about violence against women and, especially, made it visible putting it in prime time in a country where the number of murdered women increase every year.



Source: Ministry of Women and Vulnerable Populations of Peru

## 5. Highlights of the year

Two fictions released in 2019 had themes of social interest, related to current political and social issues in the country. Both were productions of Del Barrio Producciones and premiered in prime time on América Televisión.

The first was *En la Piel de Alicia*, which, as previously mentioned, raised the problem of violence against women. Although this topic had already been addressed in previous fictions, the centrality of the event put on the screen an alarming problem in Peruvian society. In 2020, the Ministry of Women indicated that only in January 464 minors were raped. With this cruel reality, the telenovela activated various interventions and discussions on social networks, included the topic in the agenda for a time, and the final episode of the telenovela presented a dedication to Eyvi Agreda, a young Peruvian woman who was burned alive by her suitor and died in 2018.

Since the victim does not remember what happened, the melodrama was combined with the crime investigation genre, also opening up topics on corruption and discriminatory treatment of the law, while searching for the culprit. Despite this, the story was modified for reasons beyond the control of the drama itself. According to unconfirmed versions, the actor who played the role of the rapist refused to perform that scene, arguing that it would affect his image and career. Due to this refusal, the plot changed, and the culprit was not the one originally chosen. Thus, instead of presenting the problem of possessive jealousy of a sexist man who does not accept negatives and believes to have rights over his partner, the final episode ended up replicating stereotypical characters of low-income rapists, with mental disorders, justifying their violence not in the patriarchal structure of the society, but in a supposed individual disorder.

The second telenovela to highlight is *Chapa tu Combi*, which began broadcasting at the end of *En la Piel de Alicia*. Since the teaser campaign, the telenovela was related to an event that shocked Peruvian citizens in 2017: the death of young people, who worked locked up in small illegal premises, due to a fire in the building

where they were working. The telenovela focuses on the character of Paloma, whose boyfriend dies locked up in the place where he worked when a fire broke out. The search for justice by the main character reveals not only the informal and semi-slavery conditions of many jobs in Lima, but also makes her face the problems of corruption and influence peddling. The telenovela also addressed the problems of mistreatment of women, and even in the final episode the villain lists injustices, inequities and forms of violence against women as her motivation for not wanting to have a daughter in Peru.

The general producer Michelle Alexander, owner of Del Barrio Producciones, said in an interview at the launch of *Chapa tu Combi* that she was interested in dealing with issues aligned with the events that occurred in Peruvian society in recent months, such as bribe payments, the corrupt political class, individualism within the society, and unscrupulous power. In fact, several telenovelas that Del Barrio Producciones has produced since 2015 are part of a commitment to fictions with social theme, mixing classic melodrama with different problems of Peruvian society, making them increasingly evident, present and central to the story. The productions of the year 2019 also meant a distancing from the theme of mother and motherhood as central elements, a resource that became common in the production company in response to the arrival of Turkish telenovelas in the country. Although these social themes achieve great engagement with the national audience and place them in the first places of audience, they also make them quite local productions, reducing the spectrum of countries where to export. Until now, Ecuador is the main destination for Del Barrio Producciones productions, which is always looking for expanding its market. The hiring of Hugo Coya as the new general manager leads in that direction.

## **6. Theme of the year: melodrama in times of streaming**

Brooks (1995), Martín-Barbero (1993), Monsiváis (2003) and Oroz (1995) suggest that melodrama is a form of narration that is articulated with the daily life of people, speaking of concerns and dreams of ordinary people, and manifesting cultural matrix strongly

rooted in tradition and morality. The Venezuelan author José Ignacio Cabrujas (2002) specifies four characteristics for melodrama stories: defined characters, powerful and definitive feelings, the victory of good over evil, and a vision of the people and of ordinary people.

For the Peruvian case, researcher Giuliana Cassano (2019) points out that television melodrama in the 21st century:

is a feminine cultural production that stages the affections, emotions, feelings, challenges, inequalities, subordination, violence, and sacrifices that women face in their daily lives. These stories offer us representations of women who are initially submissive, subordinate, and violated, who make an identity journey towards freedom and autonomy, becoming fighters, entrepreneurs, and autonomous women (Cassano, 2019, p. 25).

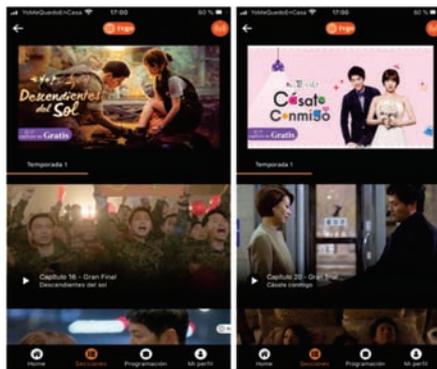
Regarding VoD, as pointed out in previous yearbooks<sup>7</sup>, the Peruvian scene has few local VoD experiences for Ibero-American television fiction. Although technology, equipment cost reduction and consumption possibilities on different platforms today are increasingly common to different audiences, the investment of television fiction in Peru is still an almost exclusive bet of América Televisión, and it is a highly risky bet due to the economic investments required, the demands of creative teams – especially scriptwriters – and the consumption practices of Peruvian national audience.

América TVGO, which is América TV's platform, is the only local pay platform and works almost exclusively as a digital repository of all its productions – information, culture, entertainment and fiction. As it was said in previous yearbooks, the platform went from being a mirror of its open TV offer to producing some of its own content with access only through the platform. In 2018, for example, América TVGO began to offer premieres of telenovelas before open

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<sup>7</sup> In *Obitel Yearbook 2018*, read chapter "Peru: a confused fiction".

TV broadcasting; it also offered previews of the episodes of some of its national fiction productions. For 2019, América TVGO supports efforts to strengthen fiction productions and began offering exclusive content – content that is not broadcasted by any other signal – of melodrama fiction. On the one hand, it offered an alternative finale of *Del Vuelta al Barrio* only on the platform<sup>8</sup>. On the other hand, it opted for South Korean productions, premiered exclusively in its section “Series TVGO”. Each of the fictions offered its first episodes for free and allowed users to pay exclusively for that content. This bet on the local platform is interesting because it makes available preferences directly on melodrama stories with a classic structure, defined characters, strong feelings, and moral confrontations. In them, we also observe own identity forms and a vision of the society that carries them out. We must stress that these productions have a captive audience that for years has watched dramas offered on open television by TV Perú and Panamericana Televisión, and now by Willax.



Source: América TVGO

Another feature of América TV’s VoD platform is its exclusive section “Telenovelas”, the one with the largest offer of titles on the

<sup>8</sup> Available at: <https://tvgo.americatv.com.pe/temporada-3-de-vuelta-al-barrio>; <https://www.americatv.com.pe/de-vuelta-al-barrio/escena-inedita-vuelta-al-barrio-que-no-salio-television-noticia-113655>

entire platform. There are 36 titles with all their episodes, among them only two are foreign ones: *La Viuda Negra*, co-produced by RTI and Televisa in 2014; and *Carrusel, la Nueva Generación*, co-produced by SBT and Televisa, broadcasted on open television in Peru in 2017. And one of the titles is a Peruvian-Argentinian co-production. This means that 33 titles are national production.

At the local production level, *En la Piel de Alicia* is perhaps the one that best reflects the presence of melodrama in the platform's offer this year. A story that evidences the permanence of the feminine approach in the melodrama story, the importance of staging national issues that summons us as a society, and the visibility of local particularities that are, in the first instance, those that allow us to establish community dialogues from the fiction offer in our country.

As indicated above, *En la Piel de Alicia* staged various forms of violence against women. This involved working with all the aesthetic and narrative possibilities of melodrama: time management and seriality – with recapitulations of the story and previews on what would happen to the characters –, a strong presence of more classic characters such as those of victims and villains – Alicia, her mother, the three suspects of the sexual assault, a less empathetic police sector with the victims and their families, among others –, the confrontation of good and evil embodied in class difference, but also in gender difference – the villains not only belonged to the upper classes, but also to the middle and lower classes and were mainly embodied by male individuals.

Concerning time management, *En la Piel de Alicia* revealed the past of important characters such as Héctor – a suspect of the assault – and Verónica – Ángel's mother, another suspect of the sexual assault to Alicia. Both stories give us information that will be important for the development of the story. We know, for example, that Héctor was locked up in a juvenile prison for causing a fire at his school, where a girl died. We also discovered that Héctor was acquitted for lack of evidence. And about Verónica, the story reveals that she was raped in her own home by an associate of her father.

The *racconto* within the text has an important presence, especially about Alicia. She does not remember the sexual assault and it will be revealed to us from this narrative strategy.

Brooks (1995) suggests that the aesthetics of recognition is related to the moment of the recognized good, where order is restored, virtue is rewarded and evil receives its punishment. Each of the characters who walked the path of good is rewarded in *En la Piel de Alicia*, especially the main character, who will find justice from the fact that the truth becomes visible. Villains and those who did wrong end up being punished, and many of them received death as punishment.

We do find a transformation in the classic scheme of the melodrama story. Although love is present, it is not the couple's love necessarily the most important, but the filial love, sorority among women, family feelings. The search for the truth and justice is the main theme and becomes the good for which we fight in a context where violence against women is a problem that cuts across society as a whole.

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## 6

# PORTUGAL: FTA AND VoD: A GENERATIONAL GAP<sup>1</sup>

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## **Introduction**

The free-to-air (FTA) channels and the video on demand (VoD) platforms have been coexisting since 2015. Even though generalist and unencrypted television still plays a central role in the media consumption of Portuguese viewers, younger generations show a propensity towards new platforms and technologies that offer a more tailored experience. In light of this paradigm, while the offer in fiction by the private networks is still very much centred on the telenovela and, consequently, on maintaining a fixed and ageing audience, the public service is taking the lead in innovating. With a varied offering in terms of genres and formats, RTP sets itself apart for its investment and development of RTP Play, a dynamic streaming platform that not only livestreams the network's broadcast, but also hosts exclusive content.

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<sup>1</sup> The Portuguese team would like to thank Caem, GfK and Markttest-MediaMonitor for their cooperation in gathering and processing the necessary data.

## 1. Portugal’s audiovisual context in 2019

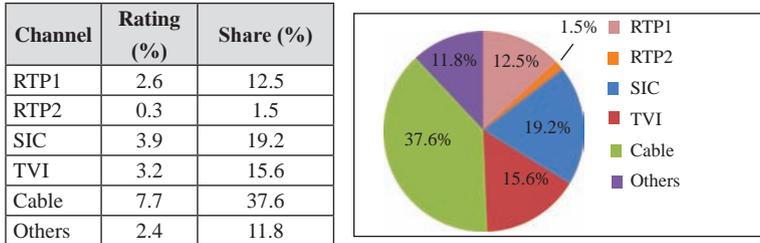
### 1.1. Open TV in Portugal

**Chart 1. Open national TV networks/channels in Portugal**

Private networks/channels (2)	Public networks/channels (4+1)
SIC TVI	RTP1 RTP2 RTP3 RTP Memória Canal Parlamento
<b>Total networks =3</b> <b>Total channels= 7</b>	

Source: Obitel Portugal

**Graph 1. TV rating and share per channel**



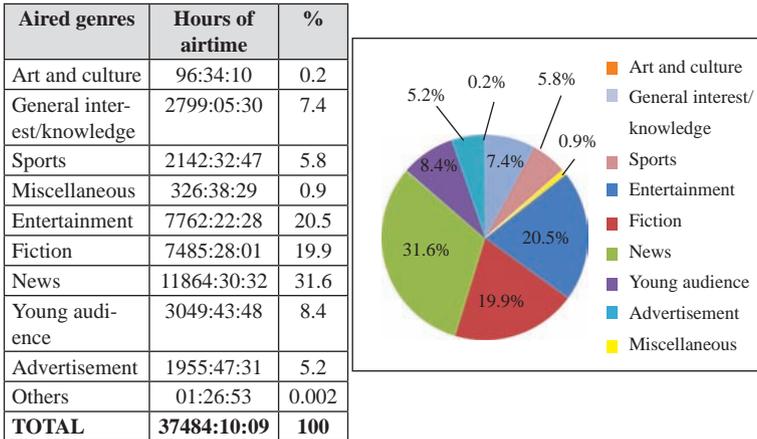
Source: Obitel Portugal and Markttest-MediaMonitor

The total offer of FTA channels has not suffered any change since 2019. In regard to total audience per channel, there was a slight decrease in the FTA networks (from 50% to 48.8% of share) and, consequently, a slight increase of subscription-based channels (from 37% to 37.6%). On the other hand, VoD consumption and other uses of television sets (web browsing, videogames, among others) rose to 11.8%, a 0.7% increase from 2018. As we can see, the numbers are not yet as expressive as in other countries, which shows that the Portuguese audience maintains an affinity towards FTA offering.

As for channel ratings, the most significant change was the rise to first place of the commercial broadcaster SIC, which was a major turn for the sector. By hiring TVI’s daytime host Cristina Ferreira

and by investing in new entertainment formats and prime time fiction more in line with a melodramatic matrix, SIC was able to return to the lead. Consequently, TVI entered a period of strategic void, becoming somewhat “adrift” while it waited to be acquired by Co-fina Media Group (which owns CMTV, the most viewed pay TV channel in Portugal).

**Chart 2. Genres and hours broadcasted on TV**



Source: Obitel Portugal and Markttest-MediaMonitor

Overall, there was an increase in the offer of all genres from 2018 to 2019. The news registered the biggest increase (over 70%), due to a year marked by social and political events, both nationally and internationally, such as the election of Jair Bolsonaro as president in Brazil, other election periods (European elections, regional elections in Madeira and general elections in Portugal), hazardous material trucker’s strike and Brexit.

Secondly, there was an increase in the offer of entertainment, with commercial broadcasters premiering mostly dating formats, such as *Casados a Primeira Vista* (SIC) and *First Dates – O primeiro encontro* (TVI). There was also RTP’s hosting of the *European Song Contest*, an event that occupied a significant portion of airtime in the first five months of the year.

For the second consecutive year, sports saw an increase in content, particularly due to Portugal's attendance in the League of Nations, SIC's renewal of the broadcasting rights for the European League and the cover and broadcast of games played by Flamengo, a Brazilian football team whose coach is Jorge Jesus, a Portuguese.

Regarding fiction, even though there was an increase in offering, it was not as substantial as the others. However, it is important to emphasize the increase in titles between 2018 and 2019 (from 19 to 21).

## **1.2. Pay TV**

In line with the tendency of previous years, the offering by pay channels saw a share increase of 1.1% from 2018, which represents 42,7% of the total audience share in 2019.<sup>2</sup> Among these, the channel CMTV maintained its lead with 4.6%, followed by Globo and Hollywood, with a share of 3.1% and 2.1% in 2019 respectively. This steady and continued growth can be linked to the number of clients in subscription-based TV distribution services. According to data provided by the National Communications Authority (Anacom),<sup>3</sup> the number of television subscriptions in 2019 grew 3.7% from the previous year.

As far as providers for this type of service in Portugal, even though NOS remains in the lead, it lost 1.1% of its market share in 2019, thus reducing its distance from MEO, its direct competitor (40.1% vs. 39.6%). The providers Vodafone and Nowo remain in third and fourth place, with 16.3% and 3.9% of all subscribers respectively.

It is also relevant to note that optical fibre technology grew 17.5% from 2018. Between new subscribers and existing client con-

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<sup>2</sup> <https://www.meiosepublicidade.pt/2020/01/mudou-nas-audiencias-tv-2019/>

<sup>3</sup> [https://www.anacom.pt/streaming/TVS2019.pdf?contentId=1515341&field=ATTACHED\\_FILE](https://www.anacom.pt/streaming/TVS2019.pdf?contentId=1515341&field=ATTACHED_FILE)

version, this technology now represents the largest segment of all the different types of subscription-based television on offer.

It is also noteworthy that, in 2019, Vodafone reached an agreement with HBO in order to offer its streaming service as an integrated package. If we consider the entry of Apple TV+ in 2019 and Disney+'s plans to do the same in 2020, VoD services represent a growth and a variety of services on offer that are in line with the market worldwide.

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

In 2019, TV advertisement held its position as the medium in which advertisers invest the most, with 81.9% of the advertisement market share against 18.1% of investment in cinema, internet, outdoors, press and radio combined.<sup>4</sup> This percentage represents a 2.9% increase from 2018 and, even though there was a decrease in number of hours of soft sponsoring (652 hours in 2019 against 812 hours in 2018), this kind of brand exposure or product placement in shows is increasing when compared with previous years. According to data by MediaMonitor<sup>5</sup>, the advertisement investment in soft sponsoring in particular went, in the last five years, from 471 million euros to 862.9 million euros. This is, undoubtedly, an expressive revenue for television networks, which translated itself in over 338 thousand individual insertions in 2019, across entertainment and fiction programs.

Regarding fiction, it is interesting to observe the general integration of soft sponsoring. In 2019, businesses and services were joined by public institutions in this type of investment. Examples of this were the introduction of a character in the telenovela *Alma e Coração* (SIC) who worked as a parking officer, paid by the Empresa Municipal de Mobilidade e Estacionamento de Lisboa (Emel);

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<sup>4</sup> <https://www.marktest.com/wap/a/n/id~25eb.aspx>

<sup>5</sup> [https://www.anacom.pt/streaming/TVS2019.pdf?contentId=1515341&field=ATTACHED\\_FILE](https://www.anacom.pt/streaming/TVS2019.pdf?contentId=1515341&field=ATTACHED_FILE)

a nurse character in the telenovela *Nazaré* (SIC) sponsored by the Nursing Association; and Leiria's Municipal Chamber, which also used *Nazaré* to promote the county.<sup>6</sup> The growing use of this kind of resource, namely for institutional advertisement, clearly demonstrates how common soft sponsoring has become as an integral aspect of any television product.

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

As has been the norm in previous years, social themes are not only present in daytime talk shows, but also in fiction, particularly telenovelas, in which stories intersect with reality. More than being portrayed as mere conflicts arising from the plot itself, these themes seem to have an element of social awareness to them. In the telenovela *Alma e Coração* (SIC), a significant part of the story is played in a social neighborhood, addressing themes such as criminality, social differences and xenophobia. In the telenovela *Vidas Opostas* (SIC), the world of football opened the possibility of using the issue of doping in professional sports. The main characters in the telenovela *Na Corda Bamba* (TVI) faced problematic family affairs such as infertility and adultery. But the most uncommon approach to these topics may be in the series *Conta-me Como Foi*. By being set in the 1980s, the series has a strong educational element in contextualizing themes that dominated the decade such as Aids, Portugal's entry to the European Economic Community (EEC) and the financial crisis at the time.

On the other hand, there is a curious intersection between capitalizing soft sponsoring and the inclusion of social themes, as the case of the National Health Organization (Direção Geral de Saúde) and its contract with SIC for branded content to promote literacy in health, more specifically regarding their flu vaccination campaign.

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<sup>6</sup> <https://executivedigest.sapo.pt/estado-investe-milhares-de-euros-em-novela-da-sic-para-promover-regiao-de-leiria/>

This initiative came to fruition in the production of content similar to that of soft sponsoring to be aired on the telenovela *Nazaré* (SIC).

## 1.5. Communication policies

The year 2019 was marked by the anticipated enactment into law of the Audiovisual Media Services Directive. Among other issues, such as the limits for advertisement and child protection measurements, the different regulations among the Member States in Europe reveal that there are foreign channels broadcasting without supervision in some countries in the European Union. These are neither subject to the obligations of supporting cinema and media nor the quotas for producing and broadcasting European and independent content. Another reality that the Directive attempts to address is the consequence of the media convergence regarding intellectual property rights and quota compliance for European and independent production. It is precisely in this matter that two opposing views remain – whether to directly invest or to apply a tax.

In May 2019, by executive decision, the Portugal Film Commission was created with the purpose of supporting and promoting cinema and audiovisual media, as well as to promote Portugal as a shooting destination. Organically under the executive members responsible for the cultural and tourism areas, PFC has, among other responsibilities, the task of contributing for national and international promotion of the Tourism and Cinema Support Fund. Launched in June 2018 by Law n. 45/2018, this non-repayable support fund presents itself as one of the most competitive in Europe, ensuring a 20-workday response to requests and an expected cash rebate of up to 30% of project expenses. The supported projects are required to make a minimum investment of 500 thousand euros in Portugal, in case they are shot in Portugal, and 250 thousand euros for documentaries or production activities that do not include shooting.

It was also in 2019 that the State Secretariat for Cinema, Audiovisual and Media was created. It demonstrates an interest in thinking about these three activities as a whole and it is representative of a

political stand grounded on the appreciation of the Portuguese language as heritage and the support for an independent sector.

## **1.6. Digital and mobile connectivity infrastructure**

In 2019, there was a significant capitalization of existing infrastructures, namely in RTP's investment in its streaming platform RTP Play and virtually transforming it in an offer similar to that of Netflix and HBO. This interest in equating nonlinear and decentralized consumption not just as subsidiary to over-the-top (OTT), but as an increasingly dominant vehicle for certain audiences, gives the information and communications technologies (ICT) such a relevant role in this dramatic shift of the television paradigm.

Internet access has been gradually rising and, in 2019, it is estimated that 75% of Portuguese over 15 years old had at least an occasional contact with the web. These numbers seem timid when compared with other nations in the European Union, where the consumption average is 87%. According to a study by Eurostat<sup>7</sup>, Portugal has the third lowest internet use, sitting above Romania and Bulgaria, the latter with an estimated use of 68%. On the other hand, while in 2018 personal computers were the preferred platform for internet access, in 2019, due to the widespread conversion to mobile devices, this has taken the first spot.<sup>8</sup> Furthermore, approximately 87% of Portuguese homes have access to pay TV, particularly on optical fiber, and there are 1.509 million users with access to streaming services of music, audiovisual media and others (proportionally 39.4% among a younger population against 1.1% among their older counterparts).<sup>9</sup> Still regarding online consumption, according to the same source, over three out of every four young people aged be-

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<sup>7</sup> <https://ec.europa.eu/eurostat/web/products-eurostat-news/-/DDN-20200127-1?inheritRedirect=true&redirect=%2FEurostat%2F>

<sup>8</sup> <https://www.marktest.com/wap/a/n/id~2563.aspx>

<sup>9</sup> <https://www.marktest.com/wap/a/n/id~254b.aspx>

tween 15 and 24 consume series, films and documentaries through the internet.<sup>10</sup>

The Digital Single Market in Europe – a project that attempts to ensure consumer and business access to goods and services across Europe, with equal infrastructure, even if in the presence of a competing market, in order to develop digital networks and optimize the potential growth of a digital economy – expects that 5G technologies will be introduced by the end of 2020.<sup>11</sup> Portugal has been working on this strategy, starting by licensing part of the already defined spectrum. Apart from the increase in bandwidth, the number of connected devices and the reduced latency, implementing 5G in full will be a way to, in articulation with investigation and development (I&D) actions, develop infrastructures that are essential to life in society, such as Internet of Things (IoT), machine-to-machine communication (M2M) and artificial intelligence. According to a study by IBM,<sup>12</sup> this environment of technological evolution will have a substantial impact in the audiovisual sector, not only because it will enable the reception of streaming content with better resolution, but, above all, it will promote immersive experiences through the use of virtual and augmented reality,

## 1.7. Independent production companies

According to the *II Anuário do Setor de Produção Audiovisual em Portugal*, there was a decrease in business volume from 2018 to 2019. This can be partly explained by how RTP allocated its budget, human resources, and programming time into producing the *European Song Contest*, as well as by TVI's standstill. However, the data shows a decrease in the most active television production companies depending on a single client, along with an increase in their workforce. Despite the uncertainty about the future, namely

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<sup>10</sup> <https://www.marktest.com/wap/a/n/id~2568.aspx>

<sup>11</sup> <https://5gobservatory.eu/>

<sup>12</sup> <https://www.ibm.com/downloads/cas/6ZEZLVLD>

regarding the outcome of implementing the AVMS Directive into national law, production companies are optimistic and plan on increasing their productivity and minimizing their losses by investing in national and international co-productions, in the hopes that the sector will grow in the near future.

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

**Table 1. Fiction broadcasted in 2019 (national and imported; premieres and reruns; co-productions)**

<p><b>PREMIERE NATIONAL TITLES – 21</b></p> <p><b>RTP1 – 8</b></p> <ol style="list-style-type: none"> <li>1. <i>3 Mulheres</i> (miniseries)</li> <li>2. <i>Circo Paraíso</i> (series)</li> <li>3. <i>Conta-me Como Foi</i> (series)</li> <li>4. <i>Lua Vermelha</i> (series)</li> <li>5. <i>O Nosso Cônsul em Havana</i> (series)</li> <li>6. <i>Solteira e Boa Rapariga</i> (series)</li> <li>7. <i>Sal</i> (series)</li> <li>8. <i>Teorias da Conspiração</i> (series)</li> </ol> <p><b>SIC – 7</b></p> <ol style="list-style-type: none"> <li>9. <i>Alma e Coração</i> (telenovela)</li> <li>10. <i>Golpe de Sorte</i> (series)</li> <li>11. <i>Nazaré</i> (telenovela)</li> <li>12. <i>Golpe de Sorte – Um Conto de Natal</i> (TV film)</li> <li>13. <i>Um Desejo de Natal</i> (TV film)</li> <li>14. <i>Terra Brava</i> (telenovela)</li> <li>15. <i>Vidas Opostas</i> (telenovela)</li> </ol> <p><b>TVI – 5</b></p> <ol style="list-style-type: none"> <li>16. <i>A Teia</i> (telenovela)</li> <li>17. <i>Amar depois de Amar</i> (telenovela)</li> <li>18. <i>Na Corda Bamba</i> (telenovela)</li> <li>19. <i>Prisioneira</i> (telenovela)</li> <li>20. <i>Valor da Vida</i> (telenovela)</li> </ol> <p><b>CMTV – 1</b></p> <ol style="list-style-type: none"> <li>21. <i>Alguém Perdeu</i> (telenovela)</li> </ol>	<p><b>PREMIERE IMPORTED TITLES – 3</b></p> <p><b>SIC – 2</b></p> <ol style="list-style-type: none"> <li>1. <i>A Dona do Pedaco</i> (telenovela)</li> <li>2. <i>Segundo Sol</i> (telenovela)</li> </ol> <p><b>TVI – 1</b></p> <ol style="list-style-type: none"> <li>3. <i>Maria Madalena</i> (series)</li> </ol> <p><b>RERUNS – 56</b></p> <p><b>RTP1 – 12</b></p> <ol style="list-style-type: none"> <li>1. <i>A Canção de Lisboa</i> (film/miniseries)</li> <li>2. <i>Água de Mar</i> (telenovela)</li> <li>3. <i>Almas Penadas</i> (TV film)</li> <li>4. <i>Aqui Tão Longe</i> (series)</li> <li>5. <i>Bem-Vindos a Beirais</i> (long-running series)</li> <li>6. <i>De Mal a Pior</i> (series)</li> <li>7. <i>Feitios</i> (series)</li> <li>8. <i>Maternidade</i> (series)</li> <li>9. <i>Mau Mau Maria</i> (series)</li> <li>10. <i>O Segredo de Miguel Zuzarte</i> (mini-series)</li> <li>11. <i>Os Compadres</i> (sitcom)</li> <li>12. <i>Virados do Avesso</i> (miniseries)</li> </ol> <p><b>RTP2 – 10</b></p> <ol style="list-style-type: none"> <li>13. <i>O Regresso de Lucas</i> (series – Argentina)</li> <li>14. <i>4 Play</i> (series)</li> <li>15. <i>Aqui Tão Longe</i> (series)</li> <li>16. <i>Bem-Vindos a Beirais</i> (long-running series)</li> <li>17. <i>Dentro</i> (series)</li> <li>18. <i>Idiotas, Pronto</i> (sitcom)</li> <li>19. <i>Lisboa Azul</i> (series)</li> <li>20. <i>O Alto</i> (series)</li> </ol>
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	<p>21. <i>O Sábio</i> (series)                  22. <i>Off</i> (series)</p> <p><b>SIC – 13</b></p> <p>23. <i>Amor à Vida</i> (telenovela – Brazil)                  24. <i>Avenida Brazil</i> (telenovela – Brazil)                  25. <i>Gabriela</i> (telenovela – Brazil)                  26. <i>Amor Maior</i> (telenovela)                  27. <i>Até Amanhã, Camaradas</i> (TV film)                  28. <i>Camilo em Sarilhos II</i> (sitcom)                  29. <i>Camilo, o Presidente</i> (sitcom)                  30. <i>Capitão Roby</i> (TV film)                  31. <i>Coração d’Ouro</i> (telenovela)                  32. <i>Filho da Treta</i> (miniseries)                  33. <i>O Crime do Padre Amaro</i> (miniseries)                  34. <i>O Espírito da Lei</i> (series)                  35. <i>Uma Aventura</i> (young audience series)</p> <p><b>TVI – 21</b></p> <p>36. <i>37</i> (miniseries)                  37. <i>A Casa é Minha</i> (series)                  38. <i>Amanhecer</i> (telenovela)                  39. <i>Belmonte</i> (telenovela)                  40. <i>Campeões e Detectives</i> (young audience series)                  41. <i>Detective Maravilhas</i> (young audience series)                  42. <i>Dias Felizes</i> (miniseries)                  43. <i>Doce Tentação</i> (telenovela)                  44. <i>Inspetor Max</i> (series)                  45. <i>Louco Amor</i> (telenovela)                  46. <i>Mar de Paixão</i> (telenovela)                  47. <i>Meu Amor</i> (telenovela)                  48. <i>Mundo ao Contrário</i> (telenovela)                  49. <i>O Amor e um Sonho</i> (miniseries)                  50. <i>O Bando dos 4</i> (young audience series)                  51. <i>O Dom</i> (miniseries)                  52. <i>Onde está Elisa?</i> (series)                  53. <i>Portal do Tempo</i> (young audience series)                  54. <i>Redenção</i> (telenovela)                  55. <i>Remédio Santo</i> (telenovela)                  56. <i>Saber Amar</i> (telenovela)</p> <p><b>CMTV – 3</b></p> <p>1. <i>Corações Feridos</i> (telenovela – Brazil)                  2. <i>Cristal</i> (telenovela – Brazil)                  3. <i>Revelação</i> (telenovela – Brazil)</p> <p><b>TOTAL PREMIERE TITLES: 21</b>  <b>TOTAL RERUNS: 66</b>  <b>TOTAL BROADCASTED TITLES: 80</b></p>
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Between 2018 and 2019, there was an increase in the offer of premiere national titles (from 19 to 21), thus inverting the downward trend that started in 2016. Showing a support for national fiction, RTP has consistently become the channel with the largest number of titles on offer, followed by SIC (with a 75% increase on offer), TVI in third place and, for the first time, CMTV. The latter, which is a pay channel owned by Cofina Group (a Portuguese media conglomerate), produced and aired a national telenovela. Even though its ratings were not expressive, *Alguém Perdeu*, produced by SP Televisão, managed to stir the sector and open new avenues for a potential increase in offer of fiction products. The number of reruns also increased, showing, once more, the instrumental use of backlogged content to fill a programming schedule.

**Table 2. Premiere fiction in 2019: countries of origin**

Country	Titles	%	Chapters/ episodes	%	Hours	%
<b>NATIONAL (total)</b>	<b>21</b>	<b>87.5</b>	<b>2149</b>	<b>87.0</b>	<b>1028:55:00</b>	<b>83.1</b>
<b>OBITEL COUNTRIES (total)</b>	<b>3</b>	<b>12.5</b>	<b>322</b>	<b>13.0</b>	<b>209:45:00</b>	<b>16.9</b>
Argentina	0	0.0	0	0.0	00:00:00	0.0
Brazil	2	8.3	263	10.6	166:41:00	13.5
Chile	0	0.0	0	0.0	00:00:00	0.0
Colombia	0	0.0	0	0.0	00:00:00	0.0
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	1	4.2	59	2.4	42:53:00	3.5
Peru	0	0.0	0	0.0	00:00:00	0.0
Portugal	21	87.5	2147	86.9	1025:25:00	82.8
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>0</b>	<b>0.0</b>	<b>0</b>	<b>0.0</b>	<b>00:00:00</b>	<b>0.0</b>
Brazilian co-productions	0	0.0	0	0.0	00:00:00	0.0
Co-productions between Obitel countries	0	0.0	0	0.0	00:00:00	0.0
<b>TOTAL OVERALL</b>	<b>24</b>	<b>100.0</b>	<b>2471</b>	<b>100.0</b>	<b>1238:40:00</b>	<b>100.0</b>

Source: Obitel Portugal and Markttest-MediaMonitor

The increase in number of titles between 2018 and 2019 corresponds to a decrease in number of chapters/episodes, but, concurrently, to an overall increase in number of produced hours. These numbers are in line with the short serial format offer (miniseries, series and TV film) and reveal an attempt to ensure a more diversified and heterogeneous offer. Content originating from the Ibero-American space is still diminishing, with an offer of three titles in 2019 – two Brazilian telenovelas on SIC and a Mexican biblical series produced by Sony Pictures Television and Dopamine. *Maria Madalena* premiered on TVI in prime time and was dubbed in Brazilian Portuguese, which goes against the trend of only airing domestic production for the past 20 years. This can be seen as another signal of the network's instability.

While the telenovela remains as a central format in the current offer in fiction, there is a visible trend towards diversification in the form of series, miniseries and TV films. The TV film is a format without much exploration in Portugal, but it is beginning to conquer space in national television. RTP has announced the production of 13 TV films for 2020, each one made by a different technical and artistic team.

**Table 3. Formats of national and Ibero-American fiction**

Format	National						Ibero-American					
	Titles	%	C/E	%	H	%	Titles	%	C/E	%	H	%
<b>Telenovela</b>	10	47.6	1929	89.8	877:56:00	85.3	2	66.7	263	81.7	166:50:00	0.8
<b>Series</b>	8	38.1	215	10.0	145:04:00	14.1	1	33.3	59	18.3	42:55:00	0.2
<b>Miniseries</b>	1	4.8	3	0.1	02:25:00	0.2	0	0.0	0	0.0	00:00:00	0.0
<b>TV film</b>	2	9.5	2	0.1	03:30:00	0.3	0	0.0	0	0.0	00:00:00	0.0
<b>Unitary</b>	0	0.0	0	0.0	00:00:00	0.0	0	0.0	0	0.0	00:00:00	0.0
<b>Docudrama</b>	0	0.0	0	0.0	00:00:00	0.0	0	0.0	0	0.0	00:00:00	0.0
<b>Others (soap opera, etc.)</b>	0	0.0	0	0.0	00:00:00	0.0	0	0.0	0	0.0	00:00:00	0.0
<b>Total</b>	<b>21</b>	<b>100.0</b>	<b>2149</b>	<b>100.0</b>	<b>1028:55:00</b>	<b>100.0</b>	<b>3</b>	<b>100.0</b>	<b>322</b>	<b>100.0</b>	<b>209:45:00</b>	<b>1.0</b>

Source: Obitel Portugal and Marktest-MedianMonitor

**Table 4. The ten most watched titles**

Title		Country of origin of the original idea or script	Channel	Format/genre	N. of chap./ep. (2019)	Time slot	Rating	Share
1	<i>Nazaré</i>	Portugal	SIC	Telenovela/drama	79	Prime time	13.7	27.2
2	<i>Terra Brava</i>	Portugal	SIC	Telenovela/drama	44	Prime time	12.7	29.6
3	<i>Golpe de Sorte</i>	Portugal	SIC	Telenovela/drama	122	Prime time	12	28.6
4	<i>Valor da Vida</i>	Portugal	TVI	Telenovela/drama	103	Prime time	11.3	24.0
5	<i>Um Desejo de Natal</i>	Portugal	SIC	TV film	1	Prime time	9.2	24.3
6	<i>Alma e Coração</i>	Portugal	SIC	Telenovela/drama	230	Prime time	9.1	21.2
7	<i>Amar Depois de Amar</i>	Argentina	TVI	Telenovela/drama	68	Prime time	8.8	18.4
7	<i>A Teia</i>	Portugal	TVI	Telenovela/drama	142	Prime time	8.2	24.3
8	<i>Na Corda Bamba</i>	Portugal	TVI	Telenovela/drama	81	Prime time	7.7	15.9
9	<i>Prisioneira</i>	Portugal	TVI	Telenovela/drama	180	Prime time	7.5	18.8
<b>Total productions:10</b>				<b>Foreign scripts: 1</b>				
100%				10%				

Source: Obitel Portugal and Markttest-MediaMonitor

Contrary to what happened in 2018, the Brazilian telenovela was unable to reach the top ten this year. This fact only confirms the already mentioned observation: the national sector seems lively and catering to the preferences of Portuguese audiences.

In 2019, however, the public channel was unable to rank in the top ten, and SIC, with six productions in the rank, was at the top of the list among the three FTA networks. TVI came second, with four titles, the same number as in the previous year. Part of the strategy for these channels was to maintain plot continuity from one year to the next, as well as a scheme of long-running fiction in an attempt to win viewership. Notably, *Um Desejo de Natal* is the only different

title, both in format – TV film – and in runtime. It was aired only once and served to bridge another TV film, *Golpe de Sorte – Um Conto de Natal*, which continued the story that had already been a national hit as a series (*Golpe de Sorte*, three seasons).

**Table 5. Audience profile of the ten most watched titles:  
gender, age, socioeconomic level**

	Title	Channel	Gender %		Socioeconomic level %				
			Women	Men	A	B	C	D	E
1	<i>Nazaré</i>	SIC	63.2	36.8	2.1	8.9	15.5	43.9	29.6
2	<i>Terra Brava</i>	SIC	63.1	36.9	1.8	9.1	17.0	43.5	28.6
3	<i>Golpe de Sorte</i>	SIC	63.3	36.7	0.1	14.0	19.5	37.5	28.9
4	<i>Valor da Vida</i>	TVI	59.9	40.1	1.0	10.1	11.4	39.2	38.2
5	<i>Um Desejo de Natal</i>	SIC	63.6	36.4	1.8	10.4	16.1	43.8	27.9
6	<i>Alma e Coração</i>	SIC	64.7	35.3	1.5	10.8	14.8	46.4	26.5
7	<i>Amar Depois de Amar</i>	TVI	63.3	36.7	1.5	5.1	13.2	45.4	34.8
8	<i>A Teia</i>	TVI	61.6	38.4	0.8	9.6	11.0	41.3	37.4
9	<i>Na Corda Bamba</i>	TVI	62.5	37.5	1.0	4.5	14.2	46.0	34.3
10	<i>Prisioneira</i>	TVI	63.2	36.8	1.2	5.7	11.9	45.8	35.5

	Titles	Channel	Age group %							
			4-14	15-24	25-34	35-44	45-54	55-64	65-74	75+
1	<i>Nazaré</i>	SIC	5.1	7.6	8.4	9.6	17.6	19.4	17.2	15.0
2	<i>Terra Brava</i>	SIC	4.6	6.6	8.1	9.4	17.4	19.5	18.3	16.1
3	<i>Golpe de Sorte</i>	SIC	5.4	5.6	11.0	10.3	18.3	19.6	16.5	6.4
4	<i>Valor da Vida</i>	TVI	6.1	5.8	12.0	10.2	15.3	18.5	16.9	15.1
5	<i>Um Desejo de Natal</i>	SIC	6.6	6.1	7.7	11.4	17.5	17.7	19.0	14.0
6	<i>Alma e Coração</i>	SIC	4.4	5.4	9.3	11.6	18.0	18.7	18.0	14.7
7	<i>Amar Depois de Amar</i>	TVI	5.3	6.7	8.1	10.4	12.0	18.0	19.4	20.0
8	<i>A Teia</i>	TVI	5.9	7.7	12.7	10.8	16.0	19.4	16.5	11.0
9	<i>Na Corda Bamba</i>	TVI	4.8	6.4	8.1	11.0	12.1	18.2	19.3	20.1
10	<i>Prisioneira</i>	TVI	5.9	7.2	8.3	10.1	13.7	19.5	17.8	17.5

Source: Obitel Portugal and Markttest-MediaMonitor

Women remain as the gender with the largest preference for telenovelas, while men maintained a stable percentage, which is similar among the top ten titles. Only TVI's telenovela *Valor da Vida* registered a little higher preference among men.

Regarding socioeconomic level, in general, groups D and E still prefer the telenovela as their prime time program. Contrary to previous years, however, lower income levels, which preferred stories produced by TVI, changed their preferences to SIC's offer in 2019, namely *Nazaré*, *Terra Brava* and *Alma e Coração*. Still, it was also a title by SIC – *Golpe de Sorte* – that managed to have the largest rating among a higher income level (B).

As for age groups, by virtue of being a heterogeneous format, telenovelas still resonate with a mostly family audience and, consequently, made up of different ages. However, it is clear that audiences aged 55+ show a strong preference for this type of format. *Valor da Vida* (TVI) was the title that appealed the most to younger audience, partly due to its replacement of *A Herdeira*, a telenovela that had also garnered their preference.

### 3. VoD Monitoring

Globally speaking, the new fiction consumption models continue to establish themselves as a trend in a market where traditional TV coexists with a variety of streaming services. The year 2019 was marked by the launch of HBO and Apple TV+, two of the largest OTT platforms worldwide. Disney also announced the launch for its platform Disney+ in 2020. According to data by Markttest<sup>13</sup>, in the last quarter of 2019 there were approximately 1.5 million subscribers of streaming services in Portugal, which corresponds to 16.8% of the population aged 15+. Even though these numbers report to integrated services, the data suggest that Netflix was the platform with the biggest adoption rate, leading the national market with an 87.7% quota<sup>14</sup>, preceded by HBO, with 8.3%.

<sup>13</sup> <https://www.markttest.com/wap/a/n/id~254b.aspx>

<sup>14</sup> <https://www.markttest.com/wap/clip.aspx?id=f1cc>

### 3.1. VoD in Portugal

**Chart 2. VoD in Portugal**

	<b>Platforms</b>	<b>Total</b>
<b>VoD linked to open TV networks</b>	RTP Play, TVI Player	2
<b>VoD linked to pay TV networks</b>	Fox Play, Fox+, AXN Now, Disney on Demand, Eleven Sports, App Sport TV, App Canal 11, App SIC Notícias, App Mundo Panda, Q Play, HBO	11
<b>VoD linked to telecommunication companies</b>	NOS Play, Mini NOS Play, NOS TV, Videoclube NOS, MEO Séries, MEO Go, VideoClube MEO, App Vodafone, Videoclube Vodafone, App Nowo, Videoclube Nowo	11
<b>VoD without links to TV networks</b>	Netflix, Amazon Prime Video, FilmIn, Mubi, YouTube Premium, Rakuten TV, Libreflix, Crunchy-Roll, Google Play, Apple+ TV, Vimeo	11
<b>TOTAL</b>		<b>35</b>

Source: Obitel Portugal

As we can see in Chart 2, 35 VoD platforms were identified in 2019<sup>15</sup>, with a balanced offer among platforms linked to telecommunication companies (11), platforms without links to TV networks (11) and platforms linked to pay TV networks (11). The offer by the two FTA channels remains: RTP Play, by the public network, and TVI Player, by its private counterpart TVI.

### 3.2. Profits from VoD systems

The Communication Observatory (OberCom)<sup>16</sup> reports a global revenue for VoD services of 21.9 billion euros in 2019, compared to 20.2 billion euros in 2018, and it estimates a continued growth for the next five years, albeit at a smaller rate. VoD remains at the forefront of the audiovisual market, with an estimated global invest-

<sup>15</sup> Data gathered by the authors.

<sup>16</sup> [https://obercom.pt/wp-content/uploads/2019/11/Media\\_Mudanc%CC%A7a\\_OberCom\\_FINAL.pdf](https://obercom.pt/wp-content/uploads/2019/11/Media_Mudanc%CC%A7a_OberCom_FINAL.pdf)

ment in content for these platforms in 2020 above that of regular broadcast and pay TV (in regards to the North American television context), probably reaching a revenue of 23.5 billion euros.

According to data published by Statista platform, gathered from the European Audiovisual Observatory<sup>17</sup>, the revenue of VoD services in Portugal reached 43.1 million euros in 2018. The same data estimate that revenue will reach 53 million euros in 2020, or a 6.1% increase from 2019<sup>18</sup>, and an expected revenue of 61 million euros in 2024.

### 3.3. VoD analysis in 2019: national and Ibero-American premiere fiction

In 2019 there was an increase in the Ibero-American titles on offer, with a total of 63 premiere productions, three of which were co-productions. Netflix, with 42 premiere titles in 2019, is the OTT with the largest offering, followed by HBO (12), RTP Play (5) and Amazon Prime Video (4). The offer of Portuguese titles remains limited, even though it was greater than in 2018. All of these five national titles originated from RTP Lab and were provided by RTP Play.

**Table 6. National and Ibero-American fiction  
broadcasted on VoD in 2019**

Premiere national titles	Premiere Ibero-American titles	Co-productions
<b>RTP Play – 5</b> 1. <i>Bad &amp; Breakfast</i> (series) 2. <i>Frágil</i> (series) 3. <i>Inquilinos</i> (series)	<b>Amazon Prime Video – 4</b> 1. <i>El Pueblo</i> (series – Spain) 2. <i>La Que Se Avecina</i> (series – Spain) 3. <i>El Juego de las Llaves</i> (series – Mexico) 4. <i>La Usurpadora</i> (series – Mexico)	<b>HBO – 1</b> 1. <i>El Hipnotizador</i> (series – Argentina, Brazil, Uruguay)

<sup>17</sup> <https://www.statista.com/statistics/438749/online-vod-film-consumer-spending-portugal/>

<sup>18</sup> <https://www.statista.com/outlook/206/147/video-streaming--svod-/portugal>

<p>4. <i>Menos um</i> (series)</p> <p>5. <i>On C@ll</i> (series)</p>	<p><b>HBO – 11</b></p> <ol style="list-style-type: none"> <li>1. <i>El Jardín de Bronce</i> (series – Argentina)</li> <li>2. <i>Epitafios</i> (series – Argentina)</li> <li>3. <i>A Vida Secreta dos Casais</i> (series – Brazil)</li> <li>4. <i>Pico da Neblina</i> (series – Brazil)</li> <li>5. <i>Psi</i> (series – Brazil)</li> <li>6. <i>Santos Dumont</i> (miniseries – Brazil)</li> <li>7. <i>El Embarcadero</i> (series – Spain)</li> <li>8. <i>Foodie Love</i> (series – Spain)</li> <li>9. <i>La Sala</i> (series - Spain)</li> <li>10. <i>Los Espookys</i> (series – Mexico)</li> <li>11. <i>Sr. Ávila</i> (series – Mexico)</li> </ol> <p><b>Netflix – 40</b></p> <ol style="list-style-type: none"> <li>1. <i>Apache: La Vida de Carlos Tevez</i> (series – Argentina)</li> <li>2. <i>Go! Vive à Tua Maneira</i> (series – Argentina)</li> <li>3. <i>O Marginal</i> (series – Argentina)</li> <li>4. <i>3%</i> (series – Brazil)</li> <li>5. <i>Coisa Mais Linda</i> (series – Brazil)</li> <li>6. <i>Irmandade</i> (series – Brazil)</li> <li>7. <i>Ninguém Tá Olhando</i> (series – Brazil)</li> <li>8. <i>O Escolhido</i> (series – Brazil)</li> <li>9. <i>O Mecanismo</i> (series – Brazil)</li> <li>10. <i>Samantha!</i> (series – Brazil)</li> <li>11. <i>Sintonia</i> (series – Brazil)</li> <li>12. <i>Frontera Verde</i> (telenovela – Colombia)</li> <li>13. <i>Sempre Bruxa</i> (series – Colombia)</li> <li>14. <i>Bolívar</i> (series – Colombia)</li> <li>15. <i>45 rpm</i> (series – Spain)</li> <li>16. <i>Alta Mar</i> (series – Spain)</li> <li>17. <i>As Miúdas do Hóquei</i> (series – Spain)</li> <li>18. <i>As Telefonistas</i> (series – Spain)</li> <li>19. <i>Brigada Costa del Sol</i> (series – Spain)</li> <li>20. <i>Criminal: Espanha</i> (series – Spain)</li> <li>21. <i>Dias de Natal</i> (miniseries – Spain)</li> <li>22. <i>Elite</i> (series – Spain)</li> <li>23. <i>Gran Hotel</i> (series – Spain)</li> <li>24. <i>Hache</i> (series – Spain)</li> <li>25. <i>La Casa de Papel</i> (series – Spain)</li> <li>26. <i>O Vizinho</i> (series – Spain)</li> <li>27. <i>Vis a Vis</i> (series – Spain)</li> <li>28. <i>Viver Sem Permissão</i> (series – Spain)</li> <li>29. <i>Clube de Cuervos</i> (series – Mexico)</li> <li>30. <i>El Club</i> (series – Mexico)</li> <li>31. <i>El Dragon: El Regreso de um Guerrero</i> (series – Mexico)</li> <li>32. <i>História de Um Crime: O Candidato</i> (series – Mexico)</li> <li>33. <i>La Casa de las Flores</i> (series – Mexico)</li> <li>34. <i>Monarca</i> (series – Mexico)</li> </ol>	<p><b>Netflix – 2</b></p> <ol style="list-style-type: none"> <li>1. <i>História de Um Crime: Noite de Halloween</i> (miniseries – Colombia, Mexico)</li> <li>2. <i>La Reina del Sur</i> (telenovela – Mexico, Colombia, Spain, USA)</li> </ol>
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	35. <i>Preso n.º 1</i> (series – Mexico)	
	36. <i>The Unknown Hitman: The Story of El Cholo Adrian</i> (series – Mexico)	
	37. <i>Tijuana</i> (series – Mexico)	
	38. <i>Yankee</i> (series – Mexico)	
	39. <i>Betty em Nova York</i> (telenovela – USA)	
	40. <i>Brincar com o Fogo</i> (series – USA)	
<b>Total: 5</b>	<b>Total: 55</b>	<b>Total: 3</b>
<b>GENERAL TOTAL: 63</b>		

Source: Obitel Portugal

**Table 7. VoD premiere fiction in 2019: countries of origin**

Country	Titles	%
<b>NATIONAL (total)</b>	<b>5</b>	<b>7.9</b>
<b>OBITEL COUNTRIES (total)</b>	<b>55</b>	<b>87.3</b>
Argentina	5	7.9
Brazil	12	19.0
Chile	0	0.0
Colombia	3	4.8
Spain	19	30.2
USA (Hispanic production)	2	3.2
Mexico	14	22.2
Peru	0	0.0
Portugal	5	7.9
Uruguay	0	0.0
Venezuela	0	0.0
<b>CO-PRODUCTIONS (total)</b>	<b>3</b>	<b>4.8</b>
Portuguese co-productions	0	0.0
Co-productions between Obitel countries	3	4.8
<b>TOTAL</b>	<b>63</b>	<b>100%</b>

Source: Obitel Portugal

In Table 7 we can see that 50% of the Obitel countries had premiere productions in the Portuguese catalogues. Spain is the country with the largest offering (19), followed by Mexico (14), Brazil (12), Argentina (5), Colombia (3) and the United States (2). Apart from Uruguay's participation in a co-production with Argentina and Brazil, titled *El Hipnotizador*, no other country had any premiere production on VoD in national territory.

**Table 8. Formats of National and Ibero-American fiction on VoD**

Format	National				Ibero-American			
	Titles	%	C/E	%	Titles	%	C/E	%
Telenovela	-	-	-	-	3	5.2	243	25.7
Series	5	100	29	100	52	86.6	686	72.5
Miniseries	-	-	-	-	3	5.2	17	1.8
Unitary	-	-	-	-	-	-	-	-
Other	-	-	-	-	-	-	-	-
<b>Total</b>	<b>5</b>	<b>100</b>	<b>29</b>	<b>100</b>	<b>58</b>	<b>100</b>	<b>946</b>	<b>100</b>

Source: Obitel Portugal

In Table 8 we can see that the series format has the largest offering, with 57 titles, encompassing all of the Portuguese productions and 86,6% of productions by Obitel countries. The telenovela and miniseries also made their presence in the catalogue with an equal number of productions (six).

### *Particularity of VoD productions*

Even though Netflix is the dominant platform in the market, followed by other international OTT, we chose to emphasize RTP Play's relevance in the national context. Launched in 2011, RTP Play underwent some changes in 2019: content was no longer organized by channel (it is now categorized by theme and suggested in the homepage) and series started to premiere first on RTP Play during the day, before airing on the station at night.

In an interview to Shifter, Pedro Landeiro, responsible for development and technology in RTP's Multimedia Department, stated that the objective for RTP Play is for it to be "not just a repository for programs that aired on TV and radio, [...] but a meeting point for new forays with audiences that do not identify themselves with the more traditional places".<sup>19</sup> Apart from including aired titles in its catalogue – a total of 2,800 programs/seasons and around 200

<sup>19</sup> <https://shifter.sapo.pt/2019/06/rtp-play-streaming-netflix/>

episodes –, RTP Play was the only platform in 2019 to premiere national titles that were exclusively produced for the online service.

In 2017, RTP also created RTP Lab, a creative and experimental laboratory for the creation of multiplatform content, where projects selected out of a public call are developed with the aim of an online premiere.<sup>20</sup> For the second year in a row, fiction projects were selected: *Bad & Breakfast*, *Inquilinos*, *On C@all*, *Frágil* and *Menos Um*. All of these were aired in 2019 as exclusive content. These five productions are fiction series comprising of five to eight episodes and a runtime between ten and 20 minutes. They are content geared towards a younger audience, with narratives that explore contemporary topics to the Portuguese millennial – relationships on social media, job uncertainty, co-living and gentrification, among others –, which are addressed to a lesser degree and in a more general way in the FTA channels.

By virtue of being the only platform associated to an open signal network with original premiere content, RTP Play sets itself apart and offers productions that meet a new consumption paradigm for fiction content.

#### **4. Fiction analysis: open TV, VoD and transmedia expressions in networks**

Social media interaction with fiction titles by their audience in 2019 remains limited to comments, with an added concern by stations in regards to the quality of the shared information and a careful management of comments, which, for the most part, express emotion and are related to plot developments.

There are three main strategies that can be seen as transmedia expressions online. On December 13, SIC created a profile and Instagram account for one of the characters in its *telenovela Terra Brava*<sup>21</sup>, which enabled the creation of narratives adjacent to the main

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<sup>20</sup> <https://media.rtp.pt/rtp/lab/o-que-e/>

<sup>21</sup> <https://www.instagram.com/elsasantinho.official/>

storyline and brought the actress closer to the viewers. Specifically, the aspiring popular Portuguese music artist Elsa Santino, played by actress Sara Matos, was brought from the screen to the digital universe and garnered over 16 thousand followers under a month. On social media, Sara Matos' character went from singer to influencer and shared her everyday life, such as the moment when she found out that she was betrayed by her boyfriend and even shared her playful side backstage on *Programa da Cristina* (the daytime program with biggest ratings in Portugal).

Similarly, in order to give traction to its third season of *La Casa de Papel*, Netflix released a humorous video on social media. In it, it was possible to see the ex-inspector Raquel answering a phone call from “Belém”, Portugal. On the other end of the call, a men's voice was heard, introducing himself as “the professor”. The tone of voice is well known for the Portuguese audience – the suggestion is that the call is from the Portuguese president, Marcelo Rebelo de Sousa, also known as the “professor” himself. The actor here takes the opportunity to welcome the famous gang and emphasize the importance of the name that was given to Raquel – Lisboa. Consequently, with a simple message by “President Marcelo” that became viral, Netflix's Twitter account managed to capture the attention of the national audience.

Also in December, Netflix created an immersive experience to mark the premiere of the series *The Witcher*, a saga based on fantasy books by Polish author Andrzej Sapkowski. For two weeks, a potion bar with a bard, inspired by the character Jaskier (Joey Batey), opened its doors to the public on Rua Cor-de-Rosa, at Cais do Sodré, in Lisbon. At the door, Kikimora, one of the iconic monsters of the saga, welcomed the patrons, posed for photos and interacted with guests. Inside, the decoration was themed after the Continent, with beverages inspired by the saga. Actors were hired to ensure a realistic experience, with medieval dancing reenactments, staged brawls, arm wrestling competitions and music and magic to boot. This type of immersive strategy of having magic tricks, tabletop games, short

story readings and role-playing presented itself as a unique opportunity to have a closer contact with the saga and the complex universe of the Continent.

## 5. Highlights of the year

A reflection on the future of FTA channels has been overdue, to the detriment of a day to day management of ratings and the direct confrontation between similar stations that fight for the same advertisement market, which is itself increasingly scarce. Still, the advertising market quota shared by televisions has enabled them to survive, albeit with decreasing budgets for national fiction that, unlike the remaining European production, is far from being in a golden age. The low budgets do not allow for the creation of a competitive audiovisual industry, one with the ability to stand by itself in the heavyweight international market.

However, despite the grim outlook, the national market has been showing some signs that it may change. An example of this is the public network's investment in short running fiction, a strategy that now includes the attempt to find international partners, producers and broadcasters to assemble a co-production that would allow for bigger budgets. This strategy has become an increasing reality in every country and poses added challenges to national production companies, as the budget gap between Portugal and other countries limits the possibility of balanced partnerships.

Therefore, the chosen highlight of the year, as per the title for this chapter, was the content distribution platform of the public television network: RTP Play. This platform, created in 2011 as a support for the television broadcast, has been gaining its own autonomy in a 360° strategy, as defined by the public station, which points towards a fresh perspective on its content distribution approach. In 2019 there was a clear fruition of this concept: the web design for the mobile app is increasingly similar to that of its counterparts such as Netflix, and a large portion of the channel's programming – including full seasons of their original series – is offered in streaming,

organized on demand by program. The idea of “exclusive” access is also present, with the access to series hours before they are aired on TV or the possibility to watch the productions developed by RTP Lab. This project has allowed for young creators to have access to a content market that is traditionally inaccessible to them and, at the same time, explore new narrative and film languages. This laboratory for the creation and production of new content has a small annual budget, so its ability to launch new products is low, with serious financial limitations. Still, in the context of being an integral part of RTP Play’s original fiction, it paves the way for exclusive content that makes the platform a true VoD service, not just a dead archive of what was broadcasted on the channel.

Undoubtedly, the public station does not suffer from the same pressure to that of private stations, as a significant portion of its budget comes from the so-called TV tax, charged to taxpayers on their electric bill. This reduces RTP’s dependency on the advertisement market and, consequently, on daily ratings. Notwithstanding, the decision was no less brave, even if inevitable, since the network’s audience is the oldest of all FTA channels. The need to prepare for the future and to consider a generation that is leaving the traditional TV set behind propelled RTP to renew its brand among younger audiences, who can access it from any device and choose from either a backlog of aired content or originals that were produced for the platform.

## **6. Theme of the year: melodrama in times of streaming**

Can we consider the telenovela a phenomenon that is almost exclusively Latin and increasingly confined to generalist stations? This question is easily answered in the negative when we stroll through the hallways of the *Palais* during the MipCom – the largest television content market. In only a few years, Turkey has become one of the main production and exporting industries for fiction; South Korea is presently a clear expanding market; and even Saudi Arabia has announced the production of a telenovela, written by

Tony Jordan, one of the authors of the soap opera *East Enders* – not to mention the rumor mill regarding streaming services being interested in telenovela texts for the first time, especially in countries where it already has strong roots.

In a quick analysis of the content available on streaming services such as Netflix, we find telenovelas from assorted origins featured. This shows that audience retention strategies include the use of long-running serial formats. Another strategy has been to change the wording of the format itself for the benefit of audiences that demonstrate a kind of lexical prejudice towards it. Therefore, telenovelas are sometimes being rebranded as superseries.

Considering our research focus, it has been a continued concern to attempt to understand the reasons that make the melodramatic format so successful in the Ibero-American television fiction, particularly in Portugal, as well as its resilience in an increasingly competitive and global market, having now reached streaming services. At a first stage, these products are presented in a second window on the platforms, but it is only a matter of time until they enter the pipeline of original production. The national territory has not been a priority for SVoD due to Portugal's small population and the lack of legislation that protects the emergent local content industry. However, the quality of national telenovelas and their relatively low production budgets are well known internationally. This may become an appealing factor considering the dramatic rise in production costs across Europe.

In order to understand the love that Portuguese audiences share towards this genre, it is relevant to understand the relationship of past audiences with popular and melodramatic types of theatre, literature and cinema. It is only in the 18th century that a new genre emerges, falling somewhere between tragedy and comedy and later named drama. In theatre, drama will, in turn, give birth to another genre dubbed as melodramatic, which will come to full fruition on cinema and television. The melodramatic, being the product of the changing times, takes advantage of basic positive and negative val-

ues, where good overcomes all difficulties to eventually prevail over evil. This brings a sense of order to the chaos and to the uncertainty that were being felt in French society. The desire that many people had in believing in some kind of order, even if unknowable, despite the chaos that their world became, and that good deeds would be eventually acknowledged and rewarded, formed a new audience in a time of social unrest, when values were being redefined. Surprisingly, this fundamentally simplistic genre still shows signs of being effective today, even if in a less radical presentation of the contrasts between good and evil, thus defying those who defend that reason should be the sole guide for artistic creation and that an appeal to the heart and basic feelings does not deserve the same consideration.

Peter Brooks (1995, p. 7) states that “the ritual of melodrama involves the confrontation of clearly identified antagonists and the expulsion of one of them. It can offer no terminal reconciliation [...]. There is, rather, a social order to be purged, a set of ethical imperatives to be made clear”. Unlike tragedy, where the protagonist is faced with a dilemma that will initiate the main conflict towards a path of introspection and only later of choice for the world, in the melodrama everything happens outside the characters, as that subjectivity is not there in the first place. The melodramatic structure progresses in this tension between polar opposites and ends, for the most part, with the victory of good after a tortuous path that the protagonist nearly lost to the villain. The latter is eventually unmasked for its true nature in a public and neutralizing fashion. “This clarification of signs – first of evil, then of virtue – is the necessary precondition for the re-establishment of the heroine” (Brooks, 1995, p. 31).

Theatre, printed serials, radio and cinema divulged and popularized these types of stories, which were often tearjerkers. A closer reading, however, often reveals much more than what the stories tell at the surface, with criticisms to social conventions and the cultural gender constrictions. To this end, Mircea Eliade (1992) considers that the melodrama recovers the structure of fairy tales, in which

the hero or heroine is set on a course filled with obstacles that will test him/her and, at the same time, grant him/her acknowledgement by Providence, thus restoring peace and balance and the inevitable triumph of good over evil. Unlike tragedy, which has always been considered the superior genre, melodrama fully embraces the happy ending, which has earned it the criticism (first in theatre, then in cinema and television) of being a false representation of “the world, as we know it, as we have seen it, yields but one ending: death, disintegration, dismemberment, and the crucifixion of our heart with the passing of the forms that we have loved” (Campbell, 2008, p. 32).

The villain is the agent of the melodrama. Its pursuit, its machinations and manipulations make the intrigue advance and complicate; they are the drive that allows for the development of all the melodramatic potential. The villain personifies this attitude of punishment, which will later turn against itself, thus ending all the misunderstandings and returning the balance that was previously lost. The secondary characters, apart from having their own independent plots, are used to flesh out the personality traits of the protagonists. In this gallery of characters, composed by allies and antagonists, there are some neutral ones, such as the comic relief, which serves as a counterpoint to the more intense dramatic scenes.

Curiously, the genre’s power remains to the present day with these same traits that were so often (and still are) pointed as weaknesses. Melodrama owes its originality not to the action motifs – which, generally speaking, rely on large and small family dramas such as inheritances, dishonor, lost and found children, all against a negative backdrop of ambition and power –, but to the events, which are the true driver for the story. The action, based on a strongly emotional language, is able to appeal to the most basic and earnest sensibilities of human nature, as we are all confronted with a world that we do not fully control and where we are constantly put to the test. Brooks (1995, p. 4) considers that “the desire to express all seems a fundamental characteristic of the melodramatic mode. Nothing is spared because nothing is left unsaid”.

This genre evolved out of the stage into new technologies, first cinema, then television, where it found a fertile ground to perfect itself in managing space and time through editing. Sentimentality and visual pleasure were also reinforced with the use of different camera lenses, which bring characters closer to the screen, and with a perpetual soundtrack to the characters' lives, which provides an added level of intensity, something previously unseen. In an article published on *Lettres Françaises*, Joseph Kessel explains that, beyond its formal rules, the genre has kept certain elements: "to write a melodrama is to deliberately refuse the often rusted norms of 'taste', of 'restraint', in favor of vigor – even if exaggerated – of conflict, of intensity – even brutal – of action, of freedom – even if unbridled – in expression" (Thomasseau, 2005, p. 138).

In the 1980s, melodrama would migrate in full force to the cinema and then to television, with titles such as *Dallas* being aired worldwide, inviting us to watch the conflicts of the private lives of a family made rich by oil trading. Specifically in Portugal, *Vila Faia* premiered in 1982, a successful experience that would pave the way to the creation of an industry based on the telenovela format. In the first decade of this new millennium, melodrama is as strong as ever and, more importantly, now acknowledged by criticism, even if outside the realm of telenovelas and soap operas. Critically acclaimed premium series such as *Sopranos*, *Six Feet Under*, *Breaking Bad*, *Mad Men* and *Transparent* are known for combining genres and exploring a style and sensibility that brings them closer to that of melodrama. This does not mean that the audiovisual industry has not acknowledged the importance of telenovelas, which was well established with the creation of an Emmy award for best international telenovela in 2008. Curiously, this award was first attributed to a Jordan production.

In our country, the telenovela is still the most powerful communication vehicle, as can be seen not only by its presence in the most watched titles, but also by the international awards and nominations, with eight Emmy nominations and three awards for best telenovela

in its 12-year history. This specialization of the national industry was acknowledged by Netflix when it entered our space, as the first titles that the platform negotiated with the commercial broadcaster SIC were telenovelas that had already been aired.

The number of titles that is annually produced and an increase of exports to Eastern European, Asian and Middle Eastern territories have been leading authors to find different and original solutions to tried and true formulas, as well as a rational use of resources that takes into account the budget restraints of productions, unlike other countries that are increasing their cost per episode every year. One of the main concerns for commercial broadcasters has been to respect the codes and standards shared by our society, which manifest themselves in certain norms, beliefs and values that are the expression of our national identity, without ever losing the universal value of the message itself.

In 1987, Gledhill defends in his article that melodrama is a way to see the world, a position under which we have been working, as genre definitions are shown to be too simplistic. Therefore, the alternative has been to consider melodrama as a fiction genre validated by its vast reach, something that no other genre has been able to reach. This makes melodrama, in all its different forms, but particularly in telenovelas, a relevant cultural product for a society relying on multimedia such as ours. Despite the persistence of certain conventions, melodrama has played a defining role in social living and in the creation of these collective images, thus contributing to the way in which we look outside and within our own groups. With a communication force such as this, it is only a matter of time until the entertainment industry, even if based in countries that do not usually produce prime time melodrama, starts looking at the numbers and begins to understand that the acquisition of new subscribers should also imply a diversified offer.

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## SPAIN: PREMIERE FICTION INCREASES COMPETITIVENESS

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## **Introduction**

Fictional programming confirms the trends noted in 2018, in a context characterized by the increase in the number of television platforms and the sustained loss of viewership in the prime time of general networks. Atresmedia and Mediasest are also now offering paid content on their respective online platforms.

Viewership of fiction on open access networks has dropped to a new low, making 2019 the first year in which not a single TV fiction has made it into the ranking of the 50 most viewed broadcasts. The absence of systematic data on the results obtained by the video on demand (VoD) platforms, however, does not allow determining in its fair measure the scope of this trend. The most outstanding characteristics of Spanish fiction in 2019 are the decrease in the number of episodes and the number of seasons of the series, while the genres of intrigue continue their expansion in both open access and paid offerings.

## **1. Spain's audiovisual context in 2019**

The weighted annual audience index of the three major generalist networks reached its historical minimum (35.9%), as a direct

consequence of La1's viewership drop (9.4%). On the contrary, the regional networks experience a slight increase in audience, and pay television achieves a new record. Advertising investment is sinking, and traditional linear television consumption has fallen for the second consecutive year. The prime time slot has been the most affected as a consequence of its progressive delay and the irregular results of the premiered fiction. Nonetheless, despite the reduction in consumption since 2012, the data continues to show the extraordinary strength of the television medium.

### 1.1. Open television in Spain

The main public and private television channels suffer from the increase in the offer of pay TV, while open DTT channels increase their share thanks to the notable growth of Energy, Atreseries, Ten and DKISS.

**Chart 1. Open TV networks<sup>1</sup>**

Reach	Public		Private	
	First channel	Second channel	Frist channel	Second channel
<b>State (national coverage)<sup>1</sup></b>	La1	La2 24H Clan Teledeporte	Antena3, Cuatro, LaSexta, Tele5	Atreseries, Be Mad TV, Boing, Disney Channel, Divinity, DKISS, DMax, El Toro TV, Energy, FDF, Gol, Mega, Neox, Nova, Paramount Network, Real Madrid HD, Ten, Trece

<sup>1</sup> Translator note: In the Spanish case, "state coverage" and "national coverage" refer 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.

<b>Autonomic (regional coverage)</b>	À Punt, Aragón TV, CanalSur, CMM, ETB1, ETB2, Extremadura TV, IB3, La7 TV, Telemadrid, TPA, TV3, TV CAN, TVG	3/24, And-TV, CSur-And, Esport3, ETB3, ETB4, Galicia TV, LaOtra, Super3/33, TPA2, TV3CAT, TVG2	8Madrid, 8TV, CYL7, Hit TV, La8, RAC105, TV Mediterráneo
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Source: Orbitel Spain

Traditional television consumption continues its downward trend, reaching the historical minimum of the last 12 years, and registers 222 minutes per viewer per day (13 minutes less than in 2018), a figure similar to that of 2007. The decrease in consumption is inversely proportional to age, in a year when the child, youth and young adult segments (from 4 to 44 years) continue to choose other means of consumption. This determines the advanced average age of the viewer of linear open television (55 years<sup>2</sup>). The time slot most affected by the decrease in consumption has been prime time, falling below the 16 million total viewers' barrier and reaching its lowest point in the last ten years.<sup>3</sup> The systematic delay of prime time favors an earlier shutdown of devices, around 10:45 pm, a phenomenon that induces the shift of the golden minutes to other time slots, mainly the access to prime time. This scenario, unique in the international context, favors on-demand platforms, whose subscribers consume less linear television than the rest of the audience.

Tele5 (14.8%) continues to be the most viewed network for the eighth consecutive year and it also is the general network with the greatest increase (seven tenths), with a share similar to that of 2015, which represents its best result in the last ten years. Following are

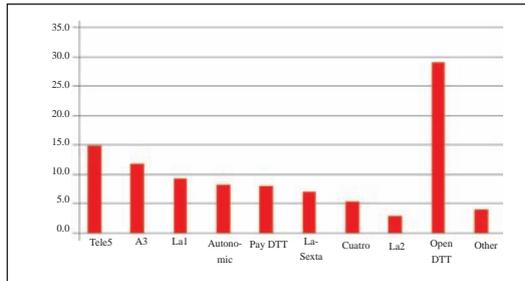
<sup>2</sup> See: [https://www.elconfidencial.com/television/programas-tv/2019-04-03/edad-media-cadenas-television-lineal-dos30\\_1920262/](https://www.elconfidencial.com/television/programas-tv/2019-04-03/edad-media-cadenas-television-lineal-dos30_1920262/)

<sup>3</sup> See: [http://vertele.eldiario.es/noticias/Espana-diferente-resto-consumo-TV\\_0\\_2125887408.html](http://vertele.eldiario.es/noticias/Espana-diferente-resto-consumo-TV_0_2125887408.html)

Antena3 (11.7%), with six tenths less than in 2018, and La1, which records an annual historical minimum (9.4%) with one point and one tenth less than the previous year. Cuatro (5.3%) also obtained its worst figure in the last ten years, with seven tenths of loss. In contrast, pay networks average four tenths more than in 2018, with 8% representing their best result of the decade.

**Graph 1. Share by state networks**

Network	%
Tele5	14.8
A3	11.7
La1	9.4
Autonomic	8.2
Pay DTT	8
LaSexta	7
Cuatro	5.3
La 2	2.7
Open DTT	29.1
Other	3.8
<b>TOTAL</b>	<b>100</b>

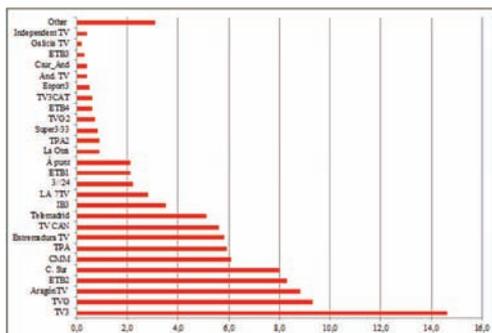


Source: Barlovento Comunicación and Kantar Media

The positive trend of the autonomic public channels (8.2%) is confirmed with an increase of 0.3%, their best result since 2014. On the contrary, the private autonomous networks (0.4%, -0.1 point) register their annual minimum of the last decade. TV3 (14.6%) repeats as the network with the highest screen share, with seven tenths above 2018, and ratifies its leadership in Catalonia for the tenth consecutive year. TVG (9.3%) falls six tenths, but it retains the second position, while Aragón TV (8.8%, +0.4) displaces Canal Sur from third place (8.0%), which dropped to fifth place after losing eight tenths. In 2019, the increases in IB3 (+1) and À Punt (+0.8) also stand out.

Graph 1a. Share by autonomic networks

Network	%
TV3	14.6
TVG	9.3
Aragón TV	8.8
ETB2	8.3
C. Sur	8
CMM	6.1
TPA	5.9
Extremadura TV	5.8
TV CAN	5.6
Telemadrid	5.1
IB3	3.5
LA7 TV	2.8
3//24	2.2
ETB1	2.1
À Punt	2.1
La Otra	0.9
TPA2	0.9
Super3/33	0.8
TVG2	0.7
ETB4	0.6
TV3CAT	0.6
Esport3	0.5
And-TV	0.4
Csur-And	0.4
ETB3	0.3
Galicia TV	0.2
Independent TV	0.4
Other	3.1
<b>TOTAL</b>	<b>100</b>



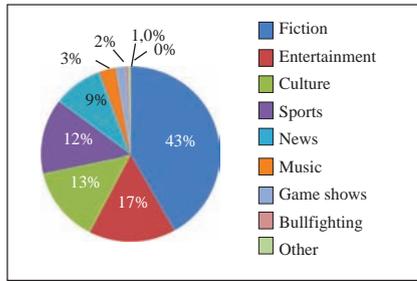
Source: Barlovento Comunicación/Kantar Media.

One more year, the leadership by business groups corresponds to Mediaset (28.9%), which increased one tenth compared to 2018. Atresmedia (26.2%) lost six tenths, but it maintains the second position. The audience share of both leaders represents more than half of the total (55.2%), although it decreased 0.4 points compared to last year. RTVE achieves 15.5%, one point less than in 2018, while Forta (8.1%) recovers four tenths. Vocento (2.9%) repeated results and Unidad Editorial (2.8%) grew two tenths.

Fictional programming, which grew 1.2 points this year, continues to be the genre with the greatest presence in state networks (42.7%), followed by entertainment (17.2%) and cultural programs (13.4%). Sports shows (11.6%), which lost 2.4 points this year, dropped to fourth place. News (9.1%) repeats results and retains its fifth position.

**Graph 2. Offer by genre on TV programming**

Genre	%
Fiction	42.7
Entertainment	17.2
Culture	13.4
Sports	11.6
News	9.1
Music	3
Game shows	2.1
Bullfighting	0.5
Other	0.4
<b>TOTAL</b>	<b>100</b>



Source: Barlovento Comunicación and Kantar Media

The feature film *Campeones* (4,247,000 viewers and 25.6%) is the only fiction format that appears among the 50 most watched programs of the year, at number 28. The most watched serial fiction broadcast corresponds, once again, to a premiere by Antena3: *Matadero*, with 3,336,000 viewers and 21.6%.

In economic terms, 2019 has been a good year for the three main audiovisual groups. In its first general budget, Pedro Sánchez’s government plans to unfreeze RTVE’s budget and increase it by 32 million euros, that is to say, 9.5% compared to the previous year. In addition, the two large private groups have managed to increase their net profit in 2019: Atresmedia reached 118 million eu-

ros, 33.8% more than the previous year<sup>4</sup>, while Mediaset increased 5.7%, accumulating 211.7 million euros.<sup>5</sup>

## 1.2. Pay TV

Digital terrestrial television (DTT) (74%) drops one point compared to 2018, but it continues to be the main television content distribution system in Spain, although it leads with its historical minimum as a result of the increase in subscriptions to pay television. This last television modality achieves a new record: 25.7% of the audience share, five tenths more than last year, mainly thanks to the increase in the IPTV system, which already represents 14% of the total viewing (+2.0 points). Cable (9%) and digital satellite (2%) drop one point each, while online television has identical results to last year (1%).

In September 2019, 6,898,599 Spanish households were subscribed to some form of pay television<sup>6</sup>, which means a year over year increase of 3.1%. In addition, in the first nine months of the year, pay television revenue amounted to 1,673.17 million euros, 4% more than in the same period in 2018, while free-to-air television decreased by 5.8%.<sup>7</sup>

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

Advertising investment in television fell 5.8%, obtaining 2,002.8 million euros, an amount that confirms the negative trend and takes away the leadership of traditional media, which has moved on to the “digital” category (2,296.2 million euros).<sup>8</sup> Advertising investment in national free-to-air networks has obtained

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<sup>4</sup> See: <https://prnoticias.com/television/antena-3/20177613-atresmedia-beneficio-119-millones-2019>

<sup>5</sup> See: <https://www.europapress.es/economia/noticia-mediaset-espana-logra-beneficio-2117-millones-2019-57-mas-20200227084349.html>

<sup>6</sup> CNMC data, available at: [http://data.cnmc.es/datagraph/jsp/inf\\_trim.jsp](http://data.cnmc.es/datagraph/jsp/inf_trim.jsp)

<sup>7</sup> Idem.

<sup>8</sup> Infoadex data, available at: <https://www.infoadex.es/home/>

1,802.7 million euros (5.9% less than in 2018), although the 90% market share has not changed compared to last year. Mediaset Spain and Atresmedia retain their hegemony in advertising revenue capturing 84.1% of the investment. Mediaset Spain obtains a market share of 43.4%, with 869 million euros, which represents a drop of 5.7% compared to the previous year. Atresmedia's 815 million euros represent a decrease of 5.5% compared to 2018 and a market share of 40.7%.

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

Promotional strategies of Spanish television fiction and its attempts to obtain complementary income are similar to those of recent years, with proposals such as an escape room (*Instinto*, Movistar+, 2019), or a clothing line, such as the one launched by Diesel inspired by *La Casa de Papel* (Antena3, 2017; Netflix, 2019-). Television fiction has also continued to try its luck in other media. Thus, Netflix and Grupo Planeta have signed an editorial agreement for the publication of novels, non-fiction books and comics aimed at expanding the creative and narrative universe of *La Casa de Papel* and *Élite* (Netflix, 2018-).

In 2019, the Spanish Commission for Refugee Aid (Cear) launched the campaign “Maras. Watch, Listen and Be Quiet”, with the support of the production company Globomedia. The campaign simulated the promotion of a television series to show that the situation of the victims “is not a fiction”. It also included a website, as well as profiles on social networks and posters on the street. The NGO explained that “it wanted to publicize the reality of the gangs at a time when fiction series on criminal organizations have taken the Spanish screens”.<sup>9</sup>

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<sup>9</sup> See: <https://www.elperiodico.com/es/sociedad/20190219/maras-no-es-una-serie-de-tv-sino-una-critica-a-la-falta-de-asilo-a-victimas-7311735>

## **1.5. Communication policies**

In June 2019, the acting government began the reform to equate the taxes of new platforms, such as Netflix and HBO, to those of national operators, such as Mediaset and Atresmedia, as established by a 2018 European Union directive. The proposal contemplates the introduction of the “RTVE rate”, which would oblige platforms to finance the public corporation, just as large private communication groups have been doing.<sup>10</sup>

## **1.6. Digital and mobile connectivity infrastructure**

In July, the transition to the Second Digital Dividend began, a process that requires that some DTT channels change their emission frequency to transfer this space for the deployment of future 5G connectivity networks. This process, identical to that of the First Digital Dividend in 2014 and 2015, will not entail the appearance or disappearance of channels, since it is simply a shift in frequencies, neither would result in the obsolescence of televisions and DTT decoders. The release of the Second Digital Dividend must be completed before June 30, 2020, to comply with the schedule established by the European Union and the Ministry of Economy and Business. In parallel, RTVE has decided to promote and renew its content platform (“A la carta”), following the example of private groups, choosing Telefónica to redesign it.

## **1.7. Independent producers**

Movistar continues to close strategic agreements to conquer new markets. In early 2019, it was announcing a fictional co-production partnership with Telemundo International Studios. In April, Telefónica reported on its alliance with the German company Beta Films and finished the year by joining forces with Atresmedia to

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<sup>10</sup> See: [http://vertele.eldiario.es/noticias/gobierno-ponen-marcha-plan-plataformas-netflix-hbo-paguen-tasa-RTVE-financiacion\\_0\\_2133686622.html](http://vertele.eldiario.es/noticias/gobierno-ponen-marcha-plan-plataformas-netflix-hbo-paguen-tasa-RTVE-financiacion_0_2133686622.html)

create a joint venture, 50% owned and dedicated to the production and distribution of television and film fiction.

The communication group Mediapro announced, in early April, the launch of The Mediapro Studio, a new division of the company to create, produce and distribute series internationally. A few days later, Netflix opened its first European production center. Orange, following Movistar's steps, has launched its first production of fiction through an alliance with Mediapro Studio and its subsidiary producer 100 Balas.

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

In 2019 there were 73 premieres (24 national, 19 regional and 30 VoD), five more than in 2018, when the spectacular increase in VoD fiction compensates for the decrease in the number of titles broadcasted on regional networks. Movistar+ is the platform that offers the largest number of premiere titles (14), followed by La1 (13 titles), Netflix (nine titles), Antena3 (six titles) and Tele5 (five titles). Another noteworthy fact of national fiction is the high number of new titles, consistent with the decrease in the number of seasons in recent years.

**Table 1. State fiction broadcasted in 2019**

<b>PREMIERE STATE TITLES – 24</b>	<b>RERUN TITLES – 9</b>
<p><b>La1 – 13</b></p> <ol style="list-style-type: none"> <li>1. <i>14 de Abril: la República</i> (series)</li> <li>2. <i>Acacias 38</i> (serial)</li> <li>3. <i>Centro Médico</i> (docudrama)</li> <li>4. <i>Cuéntame Cómo Pasó</i> (series)</li> <li>5. <i>Derecho a Soñar</i> (serial)</li> <li>6. <i>Estoy Vivo</i> (series)</li> <li>7. <i>Hospital Valle Norte</i> (series)</li> <li>8. <i>La Caza, Monteperdido</i> (series)</li> <li>9. <i>La Otra Mirada</i> (series)</li> <li>10. <i>Malaka</i> (series)</li> <li>11. <i>Mercado Central</i> (serial)</li> <li>12. <i>Promesas de Arena</i> (series)</li> <li>13. <i>Servir y Proteger</i> (serial)</li> </ol>	<p><b>La1 – 5</b></p> <ol style="list-style-type: none"> <li>25. <i>Habitaciones Cerradas</i> (miniseries)</li> <li>26. <i>La Sonata del Silencio</i> (series)</li> <li>27. <i>Olmos y Robles</i> (series)</li> <li>28. <i>Víctor Ros</i> (series)</li> <li>29. <i>Traición</i> (series)</li> </ol> <p><b>Antena3 – 2</b></p> <ol style="list-style-type: none"> <li>30. <i>Aquí No Hay Quien Viva</i> (series)</li> <li>31. <i>Pequeñas Coincidencias</i> (series)</li> </ol> <p><b>Cuatro – 1</b></p> <ol style="list-style-type: none"> <li>32. <i>Gym Toni</i> (serial)</li> </ol>

<p><b>Antena3 – 6</b></p> <p>14. <i>45 Revoluciones</i> (series)  15. <i>Allí Abajo</i> (series)  16. <i>Amar Es para Siempre</i> (serial)  17. <i>El Secreto de Puente Viejo</i> (serial)  18. <i>Matadero</i> (series)  19. <i>Toy Boy</i> (series)</p> <p><b>Tele5 – 5</b></p> <p>20. <i>Brigada Costa del Sol</i> (series)  21. <i>La que se Avecina</i> (series)  22. <i>Los Nuestros</i> (miniseries)  23. <i>Secretos de Estado</i> (series)  24. <i>Señoras del (h)AMPA</i> (series)</p>	<p><b>Divinity – 1</b></p> <p>33. <i>Yo Soy Bea</i> (serial)</p> <p><b>TOTAL PREMIERE TITLES: 24</b>  <b>TOTAL RERUN TITLES: 9</b>  <b>TOTAL BROADCASTED TITLES: 33</b></p>
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Source: Obitel Spain

The 19 premiere titles in regional networks represent seven fewer than the previous year, although the distribution by number of productions of each channel has not experienced great variations in proportional terms. Thus, the Catalan TV3 continues to be the autonomous channel with the highest number of premieres (six), followed by the Galician TVG (five titles), the Valencian À Punt and the Balearic IB3 (three titles each), and the first Basque channel ETB1 (two titles).

**Table 1a. Autonomic fiction broadcasted in 2019**

<p><b>PREMIERE AUTONOMIC TITLES – 19</b></p> <p><b>À Punt – 3</b></p> <p>1. <i>Açò És Un Destarifo</i> (sketch)  2. <i>L'Alqueria Blanca</i> (series)  3. <i>La Forastera</i> (series)</p> <p><b>ETB1 – 1</b></p> <p>4. <i>Go!azen</i> (series)  5. <i>Ihesaldia</i> (miniseries)</p> <p><b>IB3 – 3</b></p> <p>6. <i>Amor de Cans</i> (series)  7. <i>Mai Neva a Ciutat</i> (series)  8. <i>Treufoc</i> (series)</p>	<p><b>TVG – 5</b></p> <p>15. <i>A Estiba</i> (series)  16. <i>Do Dereito e do Revés</i> (series)  17. <i>Lobos e Cordeiros</i> (series)  18. <i>Os Mariachi</i> (series)  19. <i>Serramoura</i> (series)</p> <p><b>RERUNS – 4</b></p> <p><b>IB3 – 2</b></p> <p>20. <i>El Faro</i>  21. <i>Mossèn Capellà</i> (series)</p>
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<b>TV3 – 6</b> 9. <i>Benvinguts a la Família</i> (series) 10. <i>Cançó per a Tu</i> (TV movie) 11. <i>Com Si Fos Ahir</i> (serial) 12. <i>L'Enigma Verdaguer</i> (TV movie) 13. <i>Les de L'Hoquei</i> (series) 14. <i>La Dona del Segle</i> (TV movie)	<b>Forta<sup>11</sup> – 1</b> 22. <i>La Sala</i> (series)  <b>TPA – 1</b> 23. <i>La Esclava Blanca</i>  <b>TOTAL PREMIERE TITLES: 19</b> <b>TOTAL RERUN TITLES: 4</b> <b>TOTAL BROADCASTED TITLES: 23</b>
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Source: Obitel Spain

The decrease in the number of episodes/chapters of state fiction (1,339 in 2019 and 1,695 in 2018) confirms the tendency of open access networks to reduce the number of episodes of series, also resulting in the reduction of the number of hours (1,194 hours and 15 minutes in 2019 compared to 1,455 hours and 15 minutes in 2018). The only three Ibero-American titles to premiere this year on the open access channels represent a notable decrease compared to 2018 (nine), due to the consolidation of Netflix in Spain and the rise of Turkish telenovelas.

**Table 2. Premiere fiction in 2019: countries of origin**

Country	Titles	%	Chap./ep.	%	Hours	%
<b>NATIONAL (total)</b>	<b>24</b>	<b>88.9</b>	<b>1339</b>	<b>86.4</b>	<b>1194:15:00</b>	<b>83.9</b>
<b>OBITEL COUNTRIES (total)</b>	<b>3</b>	<b>11.1</b>	<b>211</b>	<b>13.6</b>	<b>229:45:00</b>	<b>16.1</b>
<b>Argentina</b>	1	3.7	60	<b>3.9</b>	40:00:00	2.8
<b>Brazil</b>	1	3.7	102	<b>6.6</b>	153:00:00	10.7
<b>Chile</b>	-	-	-	-	-	-
<b>Colombia</b>	-	-	-	-	-	-
<b>Ecuador</b>	-	-	-	-	-	-
<b>Spain</b>	<b>24</b>	<b>88.9</b>	<b>1339</b>	<b>86.4</b>	<b>1194:15:00</b>	<b>83.9</b>

<sup>11</sup> The following networks have aired *La Sala*: TV3, RTVM, SAMC, ETB2, TVPC, CMM, Aragón TV, RTPA, IB3. To avoid biasing results, only the premiere with higher ratings has been taken into account (TV3).

<b>USA (Hispanic production)</b>						
<b>Mexico</b>	1	3.7	49	3.2	36:45:00	2.6
<b>Peru</b>	-	-	-	-	-	-
<b>Portugal</b>	-	-	-	-	-	-
<b>Uruguay</b>	-	-	-	-	-	-
<b>Venezuela</b>	-	-	-	-	-	-
<b>CO-PRODUCTIONS (total)</b>	-	-	-	-	-	-
<b>Spanish co-productions</b>	-	-	-	-	-	-
<b>Obitel co-productions</b>	-	-	-	-	-	-
<b>TOTAL GENERAL</b>	<b>27</b>	<b>100.0</b>	<b>1550</b>	<b>100.0</b>	<b>1424:00:00</b>	<b>100.0</b>

Source: Obitel Spain

The reduction in the number of episodes/chapters in the Spanish total is even more pronounced than in the state fiction (1,729 in 2019 compared to 2,116 in 2018). The decrease in the number of hours (1,451 hours and 25 minutes in 2019; 1,741 hours and 40 minutes in 2018), on the other hand, is not much greater than that experienced in the total of state plus regional. This year, there are no fiction co-productions with Ibero-American countries in Spanish open TV networks.

**Table 2a. State and autonomic premiere fiction in 2019**

Country	Titles	%	Chap/ ep.	%	Hours	%
<b>NATIONAL (total)</b>	<b>43</b>	<b>93.5</b>	<b>1729</b>	<b>89.1</b>	<b>1451:25:00</b>	<b>86.3</b>
<b>OBITEL COUNTRIES (total)</b>	<b>3</b>	<b>6.5</b>	<b>211</b>	<b>10.9</b>	<b>229:45:00</b>	<b>13.7</b>
<b>Argentina</b>	1	2.2	60	3.1	40:00:00	2.4
<b>Brazil</b>	1	2.2	102	5.3	153:00:00	9.1
<b>Chile</b>	-	-	-	-	-	-
<b>Colombia</b>	-	-	-	-	-	-
<b>Ecuador</b>	-	-	-	-	-	-
<b>Spain</b>	<b>43</b>	<b>93.5</b>	<b>1729</b>	<b>89.1</b>	<b>1451:25:00</b>	<b>86.3</b>
<b>USA (Hispanic production)</b>						

<b>Mexico</b>	1	2.2	49	2.5	36:45:00	2.2
<b>Peru</b>	-	-	-	-	-	-
<b>Portugal</b>	-	-	-	-	-	-
<b>Uruguay</b>	-	-	-	-	-	-
<b>Venezuela</b>	-	-	-	-	-	-
<b>CO-PRODUCTIONS (total)</b>	-	-	-	-	-	-
<b>Spanish co-productions</b>	-	-	-	-	-	-
<b>Obitel co-productions</b>	-	-	-	-	-	-
<b>TOTAL</b>	<b>46</b>	<b>100.0</b>	<b>1940</b>	<b>100.0</b>	<b>1681:10:00</b>	<b>100.0</b>

Source: Obitel Spain

The reduction in the number of episodes of the series in recent seasons has resulted in the decrease of short formats in television fiction (TV movies and miniseries), with a single miniseries of three chapters in national fiction (*Los Nuestros 2*, Tele5) and the final section of the docudrama *Centro Médico* (La1), which comprises only 24 chapters. The contribution of series to broadcast time (179 hours and 30 minutes) decreases compared to last year (259 hours and 45 minutes), while the serial increases: 997 hours and 15 minutes in 2019 (942 hours and 20 minutes in 2018). The three Ibero-American telenovelas aired this year total 229 hours and 45 minutes.

The decrease in the broadcast time dedicated to series is slightly accentuated in the state and regional total, with 314 hours and 50 minutes in 2019 (409 hours and 15 minutes in 2018). On the other hand, the time dedicated to serials is practically identical, with 1,102 hours and 15 minutes in 2019 (1,051 hours and 50 minutes in 2018).

Table 3. Formats of state and Ibero-American fiction

Format	National				Ibero-American							
	Titles	%	C/E	%	H	%	Titles	%	C/E	%	H	%
Serial	6	25.0	1145	85.5	997:15:00	83.0	3	100.0	211	100.0	229:45:00	100.0
Series	16	66.7	167	12.5	179:30:00	15.5	-	-	-	-	-	-
Miniseries	1	4.2	3	0.2	3:30:00	0.3	-	-	-	-	-	-
TV movie	-	-	-	-	-	-	-	-	-	-	-	-
Unitary	-	-	-	-	-	-	-	-	-	-	-	-
Docudrama	1	4.2	24	1.8	14:00:00	1.2	-	-	-	-	-	-
Others (sketch)	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total</b>	<b>24</b>	<b>100.0</b>	<b>1339</b>	<b>100.0</b>	<b>1194:15:00</b>	<b>100.0</b>	<b>3</b>	<b>100.0</b>	<b>211</b>	<b>100.0</b>	<b>229:45:00</b>	<b>100.0</b>

Source: Obitel Spain

Table 3a. Formats of state, regional and Ibero-American fiction

Format	State and regional						Ibero-American					
	Titles	%	C/E	%	H	%	Titles	%	C/E	%	H	%
Serial	7	16.3	1355	78.4	1102:15:00	76.0	3	100.0	211	100.0	229:45:00	100.0
Series	29	67.4	317	18.3	314:50:00	21.7	-	-	-	-	-	-
Miniseries	2	4.7	8	0.5	6:30:00	0.4	-	-	-	-	-	-
TV movie	3	7.0	3	0.2	4:40:00	0.3	-	-	-	-	-	-
Unitary	-	-	-	-	-	-	-	-	-	-	-	-
Docudrama	1	2.3	24	1.4	14:00:00	1.0	-	-	-	-	-	-
Others (Sketch)	1	2.3	22	1.3	9:10:00	0.6	-	-	-	-	-	-
<b>Total</b>	<b>43</b>	<b>100.0</b>	<b>1729</b>	<b>100.0</b>	<b>1451:25:00</b>	<b>100.0</b>	<b>3</b>	<b>100.0</b>	<b>211</b>	<b>100.0</b>	<b>229:45:00</b>	<b>100.0</b>

Source: Obitel Spain

The 2019 ratings continue their downward trajectory due to the growth in the offer on VoD platforms, which increases the competitiveness characteristic of the Spanish television system. Consequently, the ranking of the ten most watched programs in state fiction, all of them series, reaches again a historical low. The two series that lead the ranking are the long-running *La que se Avecina* (2,521,000 viewers and 18.8% share), from Tele5, and *Cuéntame Cómo Pasó* (2,203,000 viewers and 14.1% share). The latter, on air since 2001, has become the oldest fiction in Spanish television, although in 2019 it has given up the first position in the top ten to *La que se Avecina* (2007-). The comedy *Allí Abajo* (Antena3, 2015-2019) has experienced a notable decrease in audience in its final season, which places it below the barrier of 2 million viewers, with 1,959,000 and 12.6% share (2,241,000 viewers and 14.4% share in 2018).

Thriller continues to be the genre that includes the highest number of titles among the ten most watched programs of 2019 (four titles), although this year it has lost one in favor of comedy (three titles). In addition, the only successful premiere of the year has been precisely a thriller: *La Caza, Monteperdido* (La1) (2,179,000 and 12.4% share), an adaptation of the novel *Monteperdido* (2015), by debutant Agustín Martínez, about two girls who disappear in a small town in the Pyrenees.

The rest of the 2019 premieres reflect the attempts of the networks to innovate both the subgenres of comedy and drama, and the setting of the latter, with a lukewarm response among viewers. Thus, the black comedy *Matadero* concluded its first and only season on Antena3 with an average of 1,771,000 viewers (12.1% share), despite its extraordinary debut on January 9 (3,336,000 viewers and 21.6% share). Tele5 tried its luck with the political thriller *Secretos de Estado* (1,492,000 viewers and 10.5% share), whose sophisticated characters did not connect with the audience. La1 set *Promesas de Arena* (1,464,000 viewers and 9.8% share), around an NGO located in Libya, a theme introduced in the tenth season of *Hospital*

*Central*, aired on Tele5 in 2005. The cop show *Malaka* (1,351,000 viewers and 9.9% share) ranks tenth in the ranking.

Six of the ten most viewed fictions of the year were broadcasted on La1, which continues its didactic commitment to social issues: the gender issues of *La Otra Mirada*; the international solidarity of the aforementioned *Promesas de Arena*; the retrospective look at the events that marked the Spanish society in the 1990s, remembered in the 20th season of *Cuéntame Cómo Pasó*; marginality in *Malaka*; and political corruption in *Secretos de Estado*.

**Table 4. The ten most watched state titles**

	Title	Country of original idea or script	Channel	Format/genre	C/E	Time slot	Viewers	Rating	Share
1	<i>La que se Avecina</i>	Spain	Tele5	Series/comedy	14	Prime time	2,521,000	5.6	18.8
2	<i>Cuéntame Cómo Pasó</i>	Spain	La1	Series/dramedy	10	Prime time	2,203,000	4.9	14.1
3	<i>La Caza, Monte-perdido</i>	Spain	La1	Series/thriller	8	Prime time	2,179,000	4.8	12.4
4	<i>Allí Abajo</i>	Spain	Antena3	Series/comedy	10	Prime time	1,959,000	4.3	12.6
5	<i>Matadero</i>	Spain	Antena3	Series/comedy	10	Prime time	1,771,000	3.9	12.1
6	<i>Secretos de Estado</i>	Spain	Tele5	Series/thriller	13	Prime time	1,492,000	3.3	10.5
7	<i>Promesas de Arena</i>	Spain	La1	Series/drama	6	Prime time	1,464,000	3.2	9.8
8	<i>Estoy Vivo</i>	Spain	La1	Series/fantasy	13	Prime time	1,388,000	3.1	9.2
9	<i>La Otra Mirada</i>	Spain	La1	Series/drama	8	Prime time	1,362,000	3	9.2
10	<i>Malaka</i>	Spain	La1	Series/thriller	8	Prime time	1,351,000	3	9.9
<b>Total productions: 10</b>				<b>Foreign scripts: 0</b>					
100%				0%					

Source: Obitel Spain

The decrease in audience in 2019 is even more pronounced in the regional networks than in the state ones. As usual, TV3 is the channel that includes the largest number of premieres among the ten most viewed fictions of the year, with six titles, all of them in the first positions of the classification. They are followed by TVG, with three titles, and À Punt, with one.

The series that closes the 2019 ranking, *L'Alqueria Blanca* (61,000 viewers and 4.7% share), is a drama set in the 1960s, whose first ten seasons had been broadcasted by the now gone network Canal9 between 2007 and 2013.

Five of the six TV3 fictions included in the top ten of 2019 are dramas. Among the novelties of the year of the Catalan network are the TV movie *L'Enigma Verdaguer*, a biopic about the writer and priest Jacint Verdaguer (380,000 viewers and 19.9% share), and *Les de L'Hoquei* (289,000 viewers and 11, 5% share), a series revolving around a women's hockey team.

The genres of intrigue have a smaller presence in regional fiction than in state fiction, with only two TVG series included among the most watched programs of 2019, set in rural Galicia. *Serramoura* (93,000 viewers and 9.9% share), which has been a solid asset since its premiere in 2014, and *A Estiba* (61,000 viewers and 7.7% share), a new cop show starring three women.

The empowerment of women, which embodies the stories of *Les de L'Hoquei* and *A Estiba*, also constitutes the background of TV3's TV movie *La Dona del Segle* (268,000 viewers and 12.3% share), the first television fiction filmed in Catalan and Spanish simultaneously. It is an adaptation of the homonymous novel by Margarita Melgar, inspired by the true story of the relationship between Isidre Nonell and his gypsy muse Consuelo Jiménez, set in Barcelona in 1919.

**Table 4a. The ten most watched autonomic titles**

	Title	Country of original idea or script	Channel	Format/genre	C/E	Time slot	Viewers	Rating	Share
1	<i>L'Enigma Verdaguer</i>	Spain	TV3	TV movie/drama	1	Prime time	380,000	5.2	19.9
2	<i>Benvinguts a la Família</i>	Spain	TV3	Series/comedy	13	Prime time	356,000	4.9	13.2
3	<i>Cançó per a Tu</i>	Spain	TV3	TV movie / drama	1	Prime time	302,000	4.2	10.3
4	<i>Les de L'Hoquei</i>	Spain	TV3	Series/drama	13	Prime time	289,000	4	11.5
5	<i>La Dona del Segle</i>	Spain	TV3	TV movie / drama	1	Prime time	268,000	3.7	12.3
6	<i>Com Si Fos Ahir</i>	Spain	TV3	Serial/drama	210	Afternoon	247,000	3.4	16.5
7	<i>Ser-ramoura</i>	Spain	TVG	Series/thriller	21	Prime time	93,000	3.6	9.9
8	<i>Lobos e Cordeiros</i>	Spain	TVG	Series/drama	15	Prime time	86,000	3.3	9.1
9	<i>A Estiba</i>	Spain	TVG	Series/thriller	16	Prime time	61,000	2.3	7.7
10	<i>L'Alqueria Blanca</i>	Spain	À Punt	Series/drama	8	Prime time	61,000	1.3	4.7
<b>Total productions: 10</b>				<b>Foreign scripts: 0</b>					
100%				0%					

Source: Obitel Spain

### 3. VoD monitoring

The number of digital platforms continues its upward trajectory, and they are betting even more on a themed offer. VoD fiction has experienced notable growth in a year when Mediaset and Atresmedia have launched their payment platforms, Mitele Plus and Atresplayer Premium, respectively; the latter has offered the first VoD series of a Spanish general network, *El Nudo*. In 2019 Netflix's growth has boosted the number of Ibero-American series available.

### 3.1. VoD in Spain

In 2019 new offers have arrived to Spain, such as: DAZN, the first streaming platform dedicated to sports; Planet Horror, the first and so far only OTT specialized in terror in Spain; and Acorn TV, which broadcasts exclusively British fiction. Apple TV also launched in 2019, while the opening of Disney+ has been postponed to 2020.

**Chart 2. VoD in Spain**

	<b>Platforms</b>	<b>Total</b>
<b>VoD linked to open TV channels</b>	LovesTV, RTVEalacarta.es, Playz, Atresplayer Premium, Mitele Plus, Mtmad, Novelas Nova*	7
<b>VoD linked to pay TV channels</b>	HBO España, Sky España, Planet Horror, Starzplay	4
<b>VoD linked to telecommunication companies</b>	Movistar+, Movistar+ Lite, Vodafone TV Online, App Orange TV	4
<b>VoD independent of TV networks</b>	Netflix, Filmin, Amazon Prime Video, Rakuten TV, Cineclick, Flixoló, YouTube Premium, DAZN, Apple TV, Acorn TV	10
<b>TOTAL</b>		25

\*Only platforms linked to state chains are included.

Source: Obitel Spain

The main open access communication groups in Spain, Atresmedia and Mediaset, have relaunched their VoD platforms with paid versions, Atresplayer Premium and Mitele Plus, with access to their own catalog without advertising and differentiating content that invite users to pay. Mitele Plus has focused on soccer, while Atresplayer Premium competes by launching exclusive original content and the preview of its content catalog, a pioneering modality in Spain for being an open TV channel. Movistar+ has launched Movistar+ Lite, an exclusive platform for those who are not clients of Telefónica's telecommunications services, which offers access to part of its catalog. The digital platforms Playz, from RTVE, and Flo-

oxer, from Atresmedia, continue to bet on short-lived fictions aimed at a younger audience and the interaction of the viewers through social networks.

### 3.2. Profits from VoD systems

The renewed platforms of the general open TV networks offer their catalogs at very low prices, while Netflix and HBO have raised their rates throughout 2019. Netflix maintains its basic plan at 7.99 euros per month, but it increases the price of the standard and premium plans (11.99 and 15.99 euros respectively). This increase makes Spain the sixth country where the North American platform is less profitable. HBO increases its one-time fee by 1 euro and remains at 8.99 euros per month. The price of Amazon Prime Video, Filmin, Flixolé, Rakuten TV and Sky subscriptions, on the other hand, has not changed.

### 3.3. VoD analysis in 2019: Spanish and Ibero-American premiere fiction

The growth of VoD in Spain becomes clear with the 68 titles released this year, 30 of which are Spanish and 38 are Latin American. The only co-production of the year is the historical biopic *Hernán*, about the conqueror Hernán Cortés, made jointly with Mexico.

**Table 6. National and Ibero-American fiction broadcasted on VoD in 2019**

Premiere national titles	Premiere Ibero-American titles	Premiere co-productions
<b>Movistar+ – 14 titles</b> 1. <i>Capítulo Cero</i> (series) 2. <i>El Embarcadero</i> (series) 3. <i>En el Corredor de la Muerte</i> (series) 4. <i>Gigantes</i> (series) 5. <i>Hierro</i> (series) 6. <i>Instinto</i> (series) 7. <i>Justo Antes de Cristo</i> (series) 8. <i>La Peste</i> (series)	<b>Netflix – 31 titles</b> 30. <i>3%</i> (series) 31. <i>Apache: la Vida de Carlos Tévez</i> (series) 32. <i>Betty en NY</i> (serial) 33. <i>Bolívar</i> (serial) 34. <i>Club de Cuervos</i> (series) 35. <i>Coisa Mais Linda</i> (series) 36. <i>El Ángel Desobediente</i> (series)	<b>Amazon Prime Time – 1 title</b> 68. <i>Hernán</i> (series)

9. <i>Merli Sapere Aude</i> (series)	37. <i>El Club</i> (series)	
10. <i>Mira lo que Has Hecho</i> (series)	38. <i>El Desconocido</i> (series)	
11. <i>Skam</i> (series)	39. <i>El Escogido</i> (series)	
12. <i>Todo por el Juego</i> (series)	40. <i>El Marginal</i>	
13. <i>Velvet Collection</i> (TVsmovie)	41. <i>El Mecanismo</i> (series)	
14. <i>Vida Perfecta</i> (series)	42. <i>Frontera Verde</i> (series)	
<b>Netflix – 9 titles</b>	43. <i>Go! Vive a Tu Manera</i> (series)	
15. <i>Alta Mar</i> (series)	44. <i>Historia de un Crimen</i> (series)	
16. <i>Criminal – España</i> (series)	45. <i>Jugar con Fuego</i> (series)	
17. <i>Días de Navidad</i> (miniseries)	46. <i>La Casa de las Flores</i> (series)	
18. <i>Élite</i> (series)	47. <i>La Hermandad</i> (series)	
19. <i>El Vecino</i> (series)	48. <i>La Muerte Vende</i> (series)	
20. <i>Hache</i> (series)	49. <i>La Reina del Sur</i> (series)	
21. <i>La Casa de Papel</i> (series)	50. <i>Las Muñecas de la Mafia</i> (serial)	
22. <i>Las Chicas del Cable</i> (series)	51. <i>Millennials</i> (serial)	
23. <i>Paquita Salas</i> (series)	52. <i>Monarca</i> (series)	
<b>HBO España – 2 titles</b>	53. <i>Pico da Neblina</i> (series)	
24. <i>Foddie Love</i> (series)	54. <i>Preso Número 1</i> (serial)	
25. <i>La Sala</i> (series)	55. <i>Samantha</i> (series)	
<b>Paramount – 1 title</b>	56. <i>Siempre Bruja</i> (series)	
26. <i>Atrapa a un Ladrón</i> (series)	57. <i>Sintonía</i> (series)	
<b>Fox – 1 title</b>	58. <i>Tijuana</i> (series)	
27. <i>Vis a Vis</i> (series)	59. <i>Un Bandido Honrado</i> (serial)	
<b>TNT – 1 title</b>	60. <i>Yankee</i>	
28. <i>Vota Juan</i> (series)	<b>Starzplay – 1 title</b>	
<b>Atresplayer Premium – 1 title</b>	61. <i>Vida</i> (series)	
29. <i>El Nudo</i>	<b>HBO – 3 titles</b>	
	62. <i>La Vida Secreta</i> (series)	
	63. <i>Santos Dumont</i> (series)	
	64. <i>El Jardín de Bronce</i> (series)	
	<b>Fox Premium – 1 title</b>	
	65. <i>Berko: El Arte de Callar</i> (miniseries)	
	<b>Movistar+ – 1 title</b>	
	66. <i>El Día de Mi Suerte</i> (series)	
	<b>Amazon Prime Video – 1 title</b>	
	67. <i>Diablo Guardian</i> (series)	
<b>Total: 29</b>	<b>Total: 38</b>	<b>Total: 1</b>
<b>TOTAL: 68</b>		

Source: Obitel Spain

Unlike the traditional programming of telenovelas in the generalist channels, this year Brazil is the country that contributes to the

largest number of Ibero-American fictions (12 titles), followed by Mexico (ten titles), and Colombia and Argentina (five titles each).

**Table 7. VoD premiered fiction in 2019: countries of origin**

Country	Titles	%
Argentina	5	7.4
Brazil	12	17.6
Chile	1	1.5
Colombia	5	7.4
Spain	29	42.6
USA (Hispanic production)	2	2.9
Mexico	10	14.7
Peru	1	1.5
Portugal	-	-
Uruguay	-	-
Venezuela	-	-
CO-PRODUCTIONS (total)	3	4.4
Spanish co-productions	1	1.5
Obitel co-productions	2	2.9
<b>TOTAL</b>	<b>68</b>	<b>100.0</b>

Source: Obitel Spain

Regarding format, 93.3% of Spanish fiction premiered on VoD are series, a booming format in the rest of Latin America (81.6%). Netflix's acidic comedy *Días de Navidad* remakes the three-episode miniseries, very popular in Spain in the first decade of 2000, while the series *Velvet* (Movistar+) has bid farewell to viewers with a single installment in TV movie format.

**Table 8. Formats of national and Ibero-American fiction on VoD**

Format	National				Ibero-American			
	Titles	%	C/E	%	Titles	%	C/E	%
Telenovela	-	-	-	-	6	15.8	286	38.2
Series	28	93.3	207	98.1	31	81.6	459	61.3
Miniseries	1	3.3	3	1.4	1	2.6	4	0.5

TV movie	1	3.3	1	0.5	-	-	-	-
Unitary	-	-	-	-	-	-	-	-
Docudrama	-	-	-	-	-	-	-	-
Others (soap opera, etc.)	-	-	-	-	-	-	-	-
<b>Total</b>	<b>30</b>	<b>100,0</b>	<b>211</b>	<b>100,0</b>	<b>38</b>	<b>100,0</b>	<b>749</b>	<b>100,0</b>

Source: Obitel Spain

#### 4. Fiction analysis: open TV, VoD and transmedia expressions in networks

In 2019, fiction productions of open TV channels and VoD platforms continue to bet on continuity in their transmedia strategies, although the intensity and variety of the different products they offer are very heterogeneous. Most of them are centered on the official website or the microsite on the network's website, where streaming views and complementary content are offered: photo galleries, videos, filming diaries or making of, sections related to settings and characters, tests about the degree of knowledge of the series or about the affinity with the characters, voting and soundtracks. Some of these sections have increased their level of interactivity, such as the old character and location sheets, which now include genealogies and interactive maps. However, the transmedia content that tries to expand the story and add value to the viewer is scarce.

Tele5 has released some interesting proposals, such as the filming diary *Los Nuestros 2*, where the actress Paula Echevarría, protagonist of this war miniseries, revealed secrets of the filming. However, Antena3 and La1 continue to lead the transmedia expansion in open access television. In Antena3, the Matadero site includes the exclusive section, "Destripando el Matadero" ("Gutting the Slaughterhouse"), where the protagonists reflect on their own characters and plots. This is a very similar resource to "Lo que Yo Te Cuento" ("What I'm Telling You") and "Cerrando 'El Ondas'" ("Closing 'The Ondas'"), of *45 Revoluciones*, or "Lejos del Infierno" ("Far from Hell"), by *Toy Boy*. However, the most attractive strategy of the last year has been "Desenredando el Nudo" ("Untangling the Knot"),

a weekly space where journalist Marta Robles revealed clues and anticipated valuable information about the police investigation in which *El Nudo* is focused. La1, on the other hand, has opted, among other resources, for immersive virtual reality experiences. *Servir y Proteger* and *Acacias 38* propose 3D tours/virtual tours of their sets, while the immersive 360° experience of *Cuéntame Como Pasó* integrates users in the filming of one of its chapters.

Successful fictions continue to inspire special shows about the time when they are set (*Cuéntame Cómo Pasó*), as well as spin-offs based on some of their characters (*Amar Es para Siempre*). The premieres are also accompanied by thematic debates (*Reflexiones sobre Vida Perfecta*) or podcasts that, from a warmer and more personal atmosphere, allow us to explore the most intimate details of the plots (*En el Corredor de la Muerte*).

Twitter and Instagram introduce novelties in the field of social networks. Thus, *Cuéntame Como Pasó* celebrated its return in 2019 with the hashtag #CuéntameChallenge, engaging the audience. *Servir y Proteger* went one step further and announced that the person in charge of the serial's profile would be one of the agents of the fiction, who has already sought the complicity and fidelity of viewers with the promise of parallel stories that can be consumed beyond linear emission as well as direct interaction with the audience. Youth fictions and webseries (*Les de L'Hoquei*, *Skam*, *Paquita Salas*, *Boca Norte*, *Bajo La Red* and *Más de 100 Mentiras*) opt to expand their universe by creating profiles on Instagram for each of their protagonists, where they share parallel and complementary stories to that of fiction itself, and consolidate their positions as influencers, halfway between reality and fiction.

Features like Instagram TV or Facebook Live have replaced the classic video encounters between actors and users (*Servir y Proteger*, *Benvinguts a la Família* or *Les de L'Hoquei*), while also contributing to the narrative expansion. For example, *Antes de Perder* offered broadcasts via Instagram that allowed the audience to know the point of view of one of its protagonists. Other fictions, such as

*Vis a Vis* and *Paquita Salas*, take advantage of social networks to make their content viral by creating dynamic stickers and GIFs that their followers include in their posts – a strategy that is key to build their brand.

## 5. Highlights of the year

The increase in the supply of Spanish fiction on VoD (30 titles) has been a determining factor in the decrease in audience experienced by generalist networks, despite the cautious measures taken by the latter (reducing the number of titles, the number of episodes and also their duration, as well as innovating in some subgenres and content). As noted in the second section of this chapter, the two longest running series, *Cuéntame Como Pasó* (La1) and *La que se Avecina* (Antena3), hold the first two places in the annual ranking, respectively, with a loss of 300,000 and 500,000 viewers compared to last year. The third series in the ranking, *La Caza, Monteperdido* (La1) – the only successful premiere of a year when 16 of the 24 titles of state fiction are premieres –, owes much of its success to a solid script written in part by the author of the novel<sup>12</sup> that inspired the series, also a screenwriter.

The general decline in the audience of open TV fiction has severely punished the new series by Antena3. The black comedy *Matadero* (1,771,000 viewers and 12.1% share), about a veterinarian who works in a slaughterhouse where animals of dubious quality are slaughtered, began to lose viewers since its second broadcast. The erotic drama *Toy Boy* (1,112,000 viewers and 8.2% share), a complicated topic when developing a prime time series, has followed a similar trajectory. Worse still has been *45 Revoluciones* (630,000 viewers and 4.3%), a series set in the musical environment of the 1960s whose attractive soundtrack could not prevent it from becoming the least viewed premiere on a Spanish generalist network.

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<sup>12</sup> *Monteperdido*, by Agustín Martínez.

Lal is the only network that increases the number of premieres this year, with 13 titles compared to 11 in 2018. The average audience of their series is, although modest (1,523,000 viewers and a 10.0% share), higher than its competitors Antena3 (1,368,000 viewers and 9.3% share) and Tele5 (1,333,000 viewers and 10.2% share), although their 2019 offers did not convince viewers. Thus, *Promesas de Arena* has concluded its first and only season with an average of 1,464,000 viewers (9.8% share), despite its magnificent natural setting in Tunisia. The cop show *Malaka* (1,351,000 viewers and 9.9% share), with some characters played by locals from the marginal neighborhood in Malaga, where it was shot, also ended with its first season.

Tele5's caution against the emergence of VoD has not prevented the debacle of its only three titles. The black criminal comedy starring a female cast, *Señoras del (h)AMPA*, has obtained an average audience of 1,340,000 viewers (11.0% share); the police drama set in the late 1970s, *Brigada Costa del Sol*, obtained 1,329,000 viewers (10% share); and the second season of the miniseries *Los Nuestros* ended with 1,328,000 viewers (9.9% share).

The refusal of VoD platforms to provide ratings – a strategy that allows them to promote the fictions that are capable of further expansion and hide the failures – does not allow the results of their series to be compared with those of the general networks. All in all, the variety of the premieres, the quality of some proposals and the innovations aimed at covering all possible audience niches make Spanish VoD fiction a highly competitive offer.

Movistar+ is, once again, the platform with the highest number of titles (13), eight of which are premieres in 2019. Thriller is the most prominent genre on this platform, with contributions as notable as the Spanish-French co-production *Hierro*, about a judge who investigates the murder of a young man on the homonymous island of the Canary archipelago, or the second season of the romantic thriller *El Embarcadero*.

Netflix (nine titles) has offered this year the third season of *La Casa de Papel*, the second of the youth drama *Élite*, the fourth of the female drama set in the past *Las Chicas del Cable* and the third of the comedy *Paquita Salas*. Also, some titles were highly appreciated by critics such as the noir fiction *Hache* and the family miniseries *Días de Navidad*.

Filmmaker Isabel Coixet has made her television fiction debut with HBO's romantic comedy *Foodie Love*. This North American platform has also premiered a series of intrigue co-produced with Forta (*La Sala*), which was later broadcasted on regional networks.<sup>13</sup> It is a novel initiative in Spain, which adds to the debut of paid fiction in Atresplayer with the thriller *El Nudo*.

## 6. Theme of the year: melodrama in times of streaming

*La Saga de Los Rius* (TVE1, 1976-1977), inspired by Ignacio Agustí's trilogy about the story of a family from Barcelona, represents the first great literary adaptation and the beginning of the "golden age" of Spanish television fiction (Peña, 2010, p. 71). Other miniseries followed, such as *Cañas y Barro* (TVE, 1978) and *La Barraca* (TVE, 1979), adaptations of homonymous works by Blasco Ibáñez, and *Fortunata y Jacinta* (TVE, 1980), based on Benito Pérez Galdós's novel of the same title, which enjoyed great popularity in Spain and were sold to a large number of countries. Many years later, their mix of melodrama and traditions, punctuated with plausible characters and conventional plots aimed at comforting the reader, would become the most relevant feature of Spanish serials, especially for those stories set in the past.

*El Olivar de Atocha* (TVE1, 1989) was the first serial in Spanish television fiction. It is about a humble family that emigrated from the countryside to the capital in the years prior to the civil war, with which public television attempted to explore the viabil-

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<sup>13</sup> See footnote 11.

ity of this type of productions. The irruption of private televisions that same year boosted serial production in the early 1990s (Lacalle, 2018). However, the first attempts, influenced by the Venezuelan and Mexican telenovelas that were succeeding in the Spanish prime time, obtained modest ratings. This led the networks to search among the writers of the late 19th and early 20th century a way to approach those viewers who were fans of traditional representations in fiction (costumbrism).

In the line of British soap operas, which were the benchmark for the first series of Televisió de Catalunya, *Poble Nou* (1994) and *Secrets de Família* (1995), state channels tried to approach the daily lives of viewers with stories inspired in the day to day of the protagonists and their surroundings, but without giving up the legacy of telenovelas. *El Súper: Historias de Todos Los Días* (Tele5, 1996-1999), about a supermarket cashier and her environment, was the format's first hit on state television. But the progressive wear of the format at the beginning of 2000 led to a new twist in the Spanish melodramatic series, through a return to Latin American co-productions and adaptations. Family intrigues, secrets, lies, ambition and power thus became essential ingredients of plots set in the luxurious surroundings characteristic of classic telenovelas that had inspired the first series, in clear contrast to the representations of the working class neighborhoods characteristic of the most popular British soap operas: *East Enders* and *Coronation Street* (Lacalle & Simelio, 2019).

Diagonal TV, which had produced for TVC a successful weekly serial set in the past (*Temps de Silenci*, 2001-2002), debuted on TVE with *Amar en Tiempos Revueltos* (2005-2012), an innovative proposal that interspersed neighborhood and emotional stories with archival material to portray life in Madrid between 1936 and 1957.<sup>14</sup>

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<sup>14</sup> The change of government in 2011 determined the migration of *Amar en Tiempos Revueltos* from the first public channel to Antena3, with a second part entitled *Amar es para Siempre*, which is still being broadcasted with very good ratings.

*Amar en Tiempos Revueltos* inspired a good part of the serials that have been broadcasted since 2005, whose synchrony with the audience ended up prevailing over Latin American telenovelas aired on TVE and consolidating them in the afternoon slot of Antena3. *Amar Es para Siempre* (Antena3, 2013-) has obtained 1,287,000 viewers this year (11.7% share), and *El Secreto del Puente Viejo* (Antena3, 2011-), 1,180,000 viewers (12.1% share) – quite an accomplishment in a year when the average audience for the premiere fiction of general channels has been 1,320,000 viewers and 9.8% share.

### 6.1. Drama and melodrama on VoD

In recent years, the progressive expansion of cop shows and thrillers in Spanish programming has been cornering the melodrama. Only eight of the 30 own fiction titles released on VoD platforms constitute contemporary remaking of this syncretic genre: *Alta Mar*, *Días de Navidad*, *El Embarcadero*, *El Nudo*, *Gigantes*, *Hache*, *Las Chicas del Cable* and *Velvet Colección*. From time to time, other titles also include characteristics of melodrama, but this is not the narrative mode that defines them.

Among the eight productions with accentuated melodramatic features are a miniseries and a TV movie, a symptom of the changes that are taking place with the arrival of VoD. Thus, while *Las Chicas del Cable* and *Velvet Colección* continue to display medium to long seriality distributed in different seasons, other productions, such as *El Nudo* and *Hache*, develop their entire story in less than 14 installments, lasting less than an hour each. The longest-running fictions continue to resort, more often, to the recapitulation of what has been narrated, to seduce the audience. Analepsis is frequent and the events narrated in previous seasons or periods are a regular part of conversations between characters.

In addition to the hybridization of genres, the Spanish melodramatic mode in times of VoD is set in different time periods and is characterized by female leads, another defining trait of a genre that appeals to women. In most cases, the emotional side represents the

center of the life of these characters and, although sometimes there are evident attempts at building examples of female empowerment, the truth is that the public sphere tends to be secondary or non-existent. In *Las Chicas del Cable*, for example, although the plot focuses on the lives of four women who fight to be mistresses of their own destiny in a society dominated by men, the fiction resorts to a love triangle to capture the loyalty of the audience. Female emancipation and the fight for equal rights are overshadowed by relationships of emotional dependency that make the series antithetical to feminism.

The great villains, like the victims, are also women: manipulative and Machiavellian. However, unlike traditional melodrama, the confrontation between good and evil is not so evident, and usually the characters are not completely morally confronted.

Family is the engine of melodrama in *Hache* and *Días de Navidad*. The first, inspired by true events, tells the story of Helena and her progressive rise to power in a criminal organization dedicated to smuggling heroin. Although she is an ambitious woman, the feeling that pushes her to enter drug trafficking is the need to support and protect her daughter. *Días de Navidad* revolves around the meeting of four sisters in three key stages of their lives (adolescence, adulthood and maturity) on Christmas Eve. What starts out as a classic Christmas tale ends up turning into a dramatic and painful story, punctuated by great revelations that induce the family to continue reuniting at Christmas. *Velvet Collection* also resorts to this period wrapped in nostalgia, reunions and good wishes to close all its plots, with a flourish and a happy ending.

Impossible love, another trigger for conflict very frequent in melodramas, marked the opening of *Velvet Collection*, in its beginnings as *Velvet* (Antena3, 2014-2016), before moving on to Movistar+, with the interclass love story, and consequently prohibited, between Ana and Alberto. In *Alta Mar*, on the contrary, the barrier to love for Eva and Nicolás is that the protagonist was already married before meeting the woman of his life, although he has not heard from his wife for two years. In series set in contemporary

times, “forbidden” love is also present and constitutes the axis of *El Nudo* and *El Embarcadero*, two stories that juxtapose the past with the present in order to illustrate the causes and consequences of the illicit relationship. In *El Nudo*, the couple in love flees from their respective partners and families, leading to a tragic car accident, a homicide and their subsequent police investigation. *El Embarcadero* also begins with a tragic event, the suicide of its male protagonist and the discovery by his wife of his secret life: a lover and a daughter. Both events act as catalysts so that the characters’ deepest feelings, as well as their dark secrets and memories of the past, can surface.

## 6.2. Youth melodrama

VoD platforms have successfully recovered the youth series, after a long period of absence from Spanish channels. It is a sub-genre of melodrama that burst into Spanish production in late 1997 with *Al Salir de Clase* (Tele5, 1997-2002). However, the success of this serial was not repeated, despite the fact that both Tele5 and the rest of the state television channels tried unsuccessfully to emulate it throughout the first decade of 2000. The last two attempts of the younger networks, *SMS* (LaSexta, 2006-2007) and *HKM* (Cuatro, 2008-2009), abruptly concluded the broadcast of youth series until the almost simultaneous premiere of the Spanish adaptation of *Skam* (Movistar, 2018-) and *Élite* (Netflix, 2018-). This latest production, which has become a worldwide phenomenon, represents a good example of the renewal of the format in the times of VoD, through a notable increase in sexual voltage and a narrative rhythm much closer to that of the series intended to enhance the contrasts between the characters and their social environment.

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UNITED STATES: THE RETURN OF ...  
*LA REINA DEL SUR* 2<sup>1</sup>

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### Introduction

The broadcasting of *La Reina del Sur* in 2011 was a watershed moment in the trajectory of Hispanic television. A co-production between Telemundo, RTI Colombia, and Antena 3 from Spain, *La Reina del Sur* represented a significant jump in ratings for Telemundo, particularly because it attracted young male viewers who are a critical audience segment in the context of the survival of a declining broadcasting television industry. After a decade of experimentation in which Telemundo increased its original fictional production in Miami while simultaneously pursuing co-productions with Colombia, Mexico, Brazil and Chile, *La Reina del Sur* became an instant success with a hemispheric reach. *La Reina* uses a narrative formula that I have defined as *reglobalization*: a plot evolves at a transnational level in multiple localities simultaneously, which illustrates a hemispheric dynamic constructed from a USA imaginary, a traveling narrative structure, and the casting of multicultural bodies onto which different audiences can project themselves through different vectors of national identity (Piñón, 2014b).

The formula of *La Reina* was replicated by another co-production, *El Señor de los Cielos* – this time between Telemundo and Caracol TV Colombia, with the collaboration of Argos Comunicación,

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<sup>1</sup> On behalf of Obitel, we would like to express our deep gratitude to Brad Poretzkin, national senior vice-president at TAM Nielsen, and Ralph Spencer, of the Local Media Clients team at Nielsen Media Research, for their collaboration in the realization of this study and for their invaluable contribution to the field of research in Hispanic television.

from México –, which also reached unprecedented success through its seven seasons on air. Eight years later, in 2019, the second season of *La Reina del Sur*, a co-production between Telemundo and Netflix, premiered.

Audiences had been waiting for a second season for almost a decade when Telemundo, in order to build up their anticipation, broadcasted a special edition of the first season – a shorter version – as a preamble to the premiere of *La Reina del Sur 2*. The production of this second season was the most ambitious and expensive production that the network had ever done; it was filmed in seven different countries with multinational casting, high production values, and many action-oriented sequences. The broadcasting of *La Reina del Sur 2* became a hit for the network, being the most successful fictional program in 2019. With a rating of 8.7 points, *La Reina* surpassed the rating achieved by *El Señor de los Cielos 6*, the most successful fictional production of 2018; also, it got 20.4% of the audience share, almost 4% higher than *El Señor* in 2018.

## 1. Hispanic USA's audiovisual context in 2019

### 1.1. Open TV in the USA Hispanic market

Univision and Telemundo have kept their position as the most important Hispanic television networks in the United States, followed by UniMás in third place, and by EstrellaTV and Azteca America in fourth and fifth positions, respectively.

**Chart 1. Hispanic national broadcasting networks in the USA**

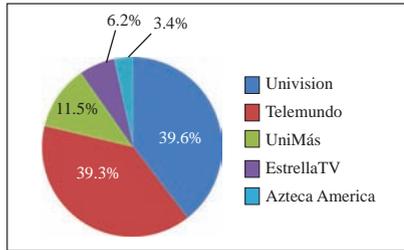
Private networks (5)
Azteca America
EstrellaTV
Telemundo
UniMás
Univision
<b>TOTAL: 5</b>

Source: Obitel USA and Nielsen

In regard to the audience demographic of persons 2+, Univision and Telemundo shares showed marginal increases, positioning the two companies in a technical tie; together, they represent 80% of the total audience share, operating as the *de facto* duopoly for the Hispanic market. Univision had 39.6% of audience share in 2019, slightly higher than 39.4% in 2018. Telemundo had 39.3% of audience share in 2019, up from 38.6% in 2018. Meanwhile, UniMás had 11.5% of audience share in 2019, down from 13% in 2018. EstrellaTV showed a 6.3% audience share, which was its same share from 2018, while Azteca America saw an increase with 3.4% audience share in 2019, up from 2.7% in 2018.

**Graph 1. TV rating and share per network**

Network	Share %
Univision	39.6
Telemundo	39.3
UniMás	11.5
EstrellaTV	6.2
Azteca America	3.4
<b>Total</b>	<b>100</b>



Source: Obitel USA – Nielsen

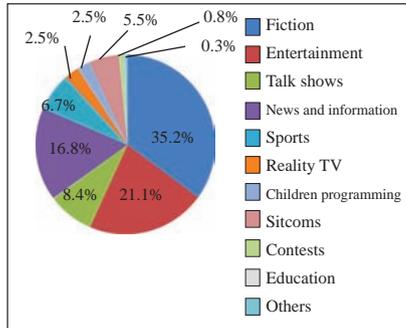
Telemundo and Univision have declared themselves winners of the 18 to 49-year-old audience demo. These unprecedented statements are possible due to the way each network promotes their own achievements. Telemundo reclaimed first place for the third consecutive year in the Monday to Friday prime time schedule from 8 to 11 pm among the 18 to 49-year-old demo (612,000 average viewers), and among the 18 to 34-year-old demo (257,000 average).<sup>2</sup> Meanwhile, Univision claimed first place for the 27th consecutive year in prime time (Monday to Sunday) among total audiences (2+), adults 18 to 49-years-old and 18 to 34-year-old demos. Univision claims

<sup>2</sup> <https://www.todotvnews.com/en/telemundo-ranks-as-leading-hispanic-network-in-weekday-prime-time/>

to have 1.3 million total viewers (2+ demo), an average of 546,000 adults aged 18-49 and an average of 221,000 adults aged 18-34 in prime time.<sup>3</sup>

**Graph 2. TV programming by genre**

Broadcasted genre	Hours	%
Fiction	11630:16	35.2
Entertainment	6977:47	21.1
News and information	5542:19	16.8
Talk shows	2792:19	8.4
Sports	2207:18	6.7
Sitcoms	1830:8	5.5
Reality TV	831:24	2.5
Children programming	828:41	2.5
Contests	266:00	0.8
Others	108:34	0.3
<b>TOTAL</b>	<b>33014:38</b>	<b>100.0</b>



Source: Obitel USA – Nielsen

Fictional programming kept its position as the content with the most screen time, followed by entertainment in second place, and news in third. However, the percentage of fictional programming in 2019 was 35.2% – the lowest in years – after representing at least 40% of screen presence through the whole decade. Meanwhile, entertainment and news programming have shown a gradual increase during these years, showing their highest number in 2019.

## 1.2. Pay TV

There are 14 pay television networks that dominate the Hispanic pay TV market in the United States. Listed in order by audience share numbers, these 14 networks are: Galavisión (Univision Hold-

<sup>3</sup> <https://corporate.univision.com/press/ratings/2019/12/18/univision-to-end-2019-as-1-spanish-language-network-for-27th-straight-year-in-prime-total-day-among-key-demos/>

ings), TDUN (formerly Univision Deportes), Discovery en Español, Universo (Comcast/NBC-U), Fox Deportes (Fox Corporation), ESPN Deportes (Disney), Nat Geo Mundo (National Geographic/Disney), CNN en Español (ATT/Warner Media), Discovery Familia (Discover Inc.), Cine Latino, BeIN Sports, HBO Latino (ATT/Warner Media), HITN, and El Rey (Univision Holdings). Most of these networks are owned by the six leading media conglomerates: Univision Holdings, Comcast-NBC, Disney, Warner Media, Fox Corporation, and Discovery.

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

Univision Corporation had advertising revenues of US\$ 2.687 billion in 2019, slightly below its revenues of US\$ 2.713 billion in 2018. Advertising revenues for Univision Media Networks were US\$ 1.296 billion in 2019, a decrease of 0.9% from the US\$ 1.308 billion from 2018.<sup>4</sup> Comcast/NBC-Universal, owner of Telemundo, reported revenues of US\$ 108.942 billion in 2019, an increase from US\$ 94.507 billion in 2018. However, the division of open TV, integrated by NBC and Telemundo, had revenues of US\$ 10.3 billion in 2019, which represents only 10% of the total corporate income and which was below the US\$ 11.5 billion in revenues from 2018.<sup>5</sup> HC2 Holdings, the parent company of Azteca America, did not publish the revenues from the network, but the holding declared net revenues of US\$ 2 billion for 2019.<sup>6</sup> EstrellaTV went through a structuration process due to bankruptcy, and, because of this, the network has not declared its revenues since 2018.

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

The primary Hispanic networks continued to air a series of social service and community-oriented campaigns in 2019. Univision

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<sup>4</sup> <https://investors.univision.net/financial-reports/quarterly-reports/default.aspx>

<sup>5</sup> <https://investors.univision.net/financial-reports/quarterly-reports/default.aspx>

<sup>6</sup> <http://ir.hc2.com/financial-information/sec-filings>

carried out its Teletón, as well as the campaigns “POSiBLE”, “Unidos por los Nuestr@s” and “Se Habla USA”. Meanwhile, Telemundo delivered campaigns titled “Mujeres Imparables”, “El Poder en Ti” and “Latinostrong Unidos Contra el Odio”. EstrellaTV broadcasted its traditional Radiotón and participated in the Annual Harvest Festival in San Antonio, Texas, The Latino Equality Alliance, and the United Latinx Fund. All of these campaigns and initiatives were oriented to the support and empowerment of the Latina community.

### **1.5. Communication policies**

In 2019, there were many different legal battles fought in the financial, technological, and educational domain by the main Hispanic television networks. For example, Dish and Univision initially did not reach an agreement about the payments that the cable provider should give to the network for the rights to distribute its programming. At the center of the controversy was the changing terms of payments and commissions in the new distribution system, and access to content in the digital landscape. This fight was reflected in Dish’s progressive loss of audiences, which started hurting the financial standing of the cable provider. Finally, in March 2019, the two corporations arrived at an agreement.

Meanwhile, EstrellaTV, of LBI Media, Inc. (Lieberman Media), founded by José and Lenard Liberman, declared bankruptcy at the end of 2018. Based on this development, EstrellaTV organized a structuring plan in 2019 in association with the HP Investment Partners. In April 2019, the plan for bankruptcy was approved by a court. This plan entailed the reorganization of the corporation, with HP Investments Partners becoming the main owners, but it also resulted in the exit of Lenard Liberman, who was the station founder, main shareholder, and CEO of the network.

After losing its longstanding hegemony in the market by yearly disappointing audience’s results, Univision announced in February 2020 that the company would be sold for less than US\$ 10 billion, a number significantly below the US\$ 13 billion with which Haim Sa-

ban, alongside a group of investors under the banner of Broadcaster Media Partners, bought the corporation in 2007. The new owner is Searchlight Capital Partners, led by Wade Davis, the former CFO of Viacom. Davis and his group of investors will have 64% of ownership of the corporation, and Televisa will retain the 36% of the company.

## 1.6. Digital and mobile connectivity infrastructure

The smartphone penetration rate in the United States is 81%<sup>7</sup>, and broadband internet services reach 87% of the population.<sup>8</sup> In this context, subscription numbers for pay television are falling as a result of the phenomenon known as *cord cutting*, triggered by the new options for content distribution that are being offered by digital platforms and VoD services. The trend of cord cutting, which was initiated in 2013 with the loss of 105,000 subscriptions, expanded year upon year, until it reached alarming dimensions with the loss of 1.5 million subscriptions in 2017, and the loss of 2.8 million subscriptions in 2019.<sup>9</sup> But this loss is only on the surface of a twofold reality in which the very companies that are losing terrain in the corporative division of pay telecommunications are winning subscriptions as internet providers. In fact, reports in the press show that 2019 was a good year for the telecommunications sector, as new subscriptions for broadband services allowed Comcast and Charter, the two main cable providers, to see increases of 60% and 25%, respectively, during December 2019.<sup>10</sup>

## 1.7. Independent producers

Independent producers have kept their key role in the making of successful fictions for Spanish language television in the United

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<sup>7</sup> <https://www.statista.com/statistics/201184/percentage-of-mobile-phone-users-who-use-a-smartphone-in-the-us/>

<sup>8</sup> <https://www.statista.com/statistics/590800/internet-usage-reach-usa/>

<sup>9</sup> <https://www.fool.com/investing/2019/09/15/this-trend-should-terrify-big-cable.aspx>

<sup>10</sup> <https://www.multichannel.com/blog/cable-industry-trends-2020>

States. Among the most active are: Argos, AG Colombia, Fox Telecolombia, Keshet International, Isla Audiovisual, Bambú Producciones, Teleset, BTF Media, W Studios and Lemon Studios. These production houses have produced for Telemundo, Univision and Televisa, in association with Netflix, Sony Corporation, Disney and Globo.

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

The USA Hispanic population has a multinational, multicultural, and bilingual composition, making it a unique case in the context of *Obitel*. In the specific case of the Spanish-speaking population, they tend to have, in general, a strong sociocultural connection with the countries from where they or their families came. For this reason, fictional content coming from Latin America has been a key factor in the consumption preferences of this audience.

Accordingly, in the last two decades, the Spanish-language television networks, such as Telemundo, have developed an aggressive production strategy from that region, and particularly from Colombia and Mexico. This trend is now coupled with a new strategy put in place by the largest media conglomerates – such as Sony, Disney, Viacom/CBS, Warner Media/HBO, and Comcast/NBC – to produce content in Spanish and Portuguese within the region and in collaboration with local production houses, in order to win over Latin American audiences in their domestic markets.

For this reason, the assignment of country of origin has become a challenging task, particularly when the fictional content is produced by an American corporation, but created, developed and shot in Latin American settings with local casts and local professionals. For instance, Sony Pictures Corporation has produced a significant amount of fictional content through its local production house in Colombia, Teleset. Also, 21st Century Fox (Disney) produces in the region through Fox Latin America and, in particular, through its production houses Fox Telecolombia and Estudios TeleMexico. Disney

itself has had an important production ally in Vista Producciones in Colombia, but also in different indie production houses in Argentina and Mexico.

An example that illustrates the obtuse status of a production or co-production, between the national or the foreign, can be seen in the successful relationship between US Hispanic Telemundo and the Mexican indie production house Argos Comunicaciones. This corporate relationship has produced such surge hits as *El Señor de los Cielos*, *Señora Acero*, *La Doña*, *El Chema* and *La Reina del Sur*, among many others. These fictional productions have been filmed mostly in Mexican cities and environments, with narratives reflecting Mexican sociopolitical and cultural realities, with Mexican actors and Mexican professionals; therefore, they may be considered Mexican, but, in fact, they are American productions.

Thus, it has become increasingly difficult to establish a clear line between, on the one hand, the copyright of a television product (in this case, ownership of an American corporation) and, on the other, the sociocultural realities in which these products are made by indie producers in different nations across Latin America. The term “co-production” is a very specific legal term, and the only two productions declared as such are *Jugar con Fuego* (Telemundo and Globo) and *La Reina del Sur 2* (Telemundo and Netflix). However, restricting my classification of content by this narrow legal definition means disregarding a robust catalogue of transnational collaborations across the region, in which the USA Hispanic industry as well as the larger mainstream media conglomerates are invested with local producers.

**Table 1. Fictions broadcasted in 2019 (national and imported; premiere and reruns; and co-productions)**

<p><b>PREMIERE NATIONAL TITLES – 12</b>  <b>Telemundo – 12</b>            1. <i>El Barón</i> (telenovela)            2. <i>Betty en Nueva York</i> (telenovela)            3. <i>Decisiones: Unos Ganan, Otros Pierden</i> (unitary)            4. <i>Falsa Identidad</i> (telenovela)            5. <i>Al Final del Paraíso</i> (telenovela - USA, Colombia)            6. <i>Jugar con Fuego</i> (miniseries – USA, Brazil)            7. <i>No te Puedes Esconder</i> (telenovela)            8. <i>Preso n.º 1</i> (telenovela – USA, Mexico)            9. <i>La Reina del Sur</i> (telenovela)            10. <i>El Secreto de Selena</i> (miniseries)            11. <i>El Señor de los Cielos 7</i> (telenovela – USA, Mexico)            12. <i>Señora Acero</i> (telenovela – USA, Mexico)</p> <p><b>CO-PRODUCTIONS – 2</b>  <b>Telemundo – 2 (listed above)</b>            1. <i>Jugar con Fuego</i> (USA, Brazil)            2. <i>La Reina del Sur 2</i> (USA, USA)</p> <p><b>PREMIERE IMPORTED TITLES – 33</b>  <b>Azteca America – 2</b>            1. <i>Pobre Diabla</i> (telenovela – Mexico, Venezuela)            2. <i>Prófugas el Destino</i> (telenovela – Mexico)</p> <p><b>EstrellaTV – 2</b>            3. <i>Loquito por Ti</i> (telenovela – Colombia)            4. <i>La Mama del 10</i> (telenovela – Colombia)</p> <p><b>Telemundo – 2</b>            5. <i>Poquito Tuyo</i> (telenovela – Mexico)            6. <i>Anónima</i> (telenovela – Colombia, USA)</p> <p><b>Univision – 22</b>            7. <i>Amar a Muerte</i> (telenovela – Mexico)            8. <i>Como Dice el Dicho</i> (unitary – Mexico)            9. <i>Cuna de Lobos</i> (telenovela – Mexico)            10. <i>Doña Flor y sus Dos Maridos</i> (telenovela – Mexico)            11. <i>El Dragón: El Regreso de un Guerrero</i> (telenovela – Mexico)            12. <i>En Tierras Salvajes</i> (telenovela – Mexico, Spain)</p>	<p><b>RERUNS – 50</b>  <b>Azteca America – 5</b>            1. <i>Cada Quien su Santo</i> (unitary – Mexico)            2. <i>Lo que Callamos las Mujeres</i> (unitary – Mexico)            3. <i>Lo que la Gente Cuenta</i> (series – Mexico)            4. <i>Las Malcriadas</i> (telenovela – Mexico)            5. <i>Un Día Cualquiera</i> (docudrama – Mexico)</p> <p><b>Estrella TV – 5</b>            6. <i>La Esclava Blanca</i> (telenovela – Colombia)            7. <i>Pablo Escobar: El Patrón del Mal</i> (telenovela – Colombia)            8. <i>Historias Delirantes</i> (series – Mexico)            9. <i>La Ronca de Oro</i> (telenovela – Colombia)            10. <i>Tarde te Conocí</i> (telenovela – Colombia)</p> <p><b>Telemundo – 12</b>            11. <i>Celia</i> (telenovela – Colombia, USA)            12. <i>El Clon</i> (telenovela – USA, Brazil, Colombia)            13. <i>Decisiones Extremas</i> (unitary – USA, Colombia)            14. <i>La Doña – Edición Especial</i> (telenovela – USA, Mexico)            15. <i>Hasta que te Conocí</i> (miniseries – USA, Mexico)            16. <i>Historias de la Virgen Morena</i> (unitary – USA, Mexico)            17. <i>Jenni Rivera: Mariposa de Barrio</i> (telenovela – USA)            18. <i>Luis Miguel: La Serie</i> (miniseries – USA, Mexico)            19. <i>Milagros de Navidad</i> (unitary - USA)            20. <i>La Patrona</i> (telenovela – USA, Mexico)            21. <i>La Reina del Sur 1 – Edición Especial</i> (telenovela – USA, Colombia, Spain, Mexico)            22. <i>Silvana sin Lana</i> (telenovela – USA)</p> <p><b>Univision – 8</b>            23. <i>Cachito de Cielo</i> (telenovela – Mexico)            24. <i>Destilando Amor</i> (telenovela – Mexico)</p>
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13. <i>Esta Historia me Suena</i> (unitary – Mexico)	25. <i>La Gata</i> (telenovela – Mexico)
14. <i>Fuerza de Creer</i> (miniseries – Mexico)	26. <i>Qué Bonito Amor</i> (telenovela – Mexico)
15. <i>Hijas de la Luna</i> (telenovela – Mexico)	27. <i>Que te Perdona Dios... Yo No</i> (telenovela – Mexico)
16. <i>Jesús</i> (telenovela – Brazil)	28. <i>La Rosa de Guadalupe</i> (unitary – Mexico)
17. <i>Juntos, el Corazón no se Equivoca</i> (telenovela – Mexico)	29. <i>Soy tu Dueña</i> (telenovela – Mexico)
18. <i>La Reina Soy Yo</i> (telenovela – Mexico, Colombia, USA)	30. <i>Y Mañana Será Otro Día</i> (telenovela – Mexico)
19. <i>Like, la Leyenda</i> (telenovela – Mexico)	<b>UniMás – 20</b>
20. <i>Mi Marido Tiene Más Familia</i> (telenovela – Mexico)	31. <i>Las Amazonas</i> (telenovela – Mexico)
21. <i>Por Amar sin Ley</i> (telenovela – Mexico)	32. <i>Amo Despertar Contigo</i> (telenovela – Mexico)
22. <i>Ringo</i> (telenovela – Mexico)	33. <i>Antes Muerta que Lichita</i> (telenovela – Mexico)
23. <i>Rosa de Guadalupe</i> (unitary – Mexico)	34. <i>Blue Demon 1</i> (miniseries – Mexico, USA, Colombia)
24. <i>Silvia Pinal, Frente a Ti</i> (miniseries – Mexico)	35. <i>Blue Demon 2</i> (miniseries – Mexico, USA, Colombia)
25. <i>Sin Miedo a la Verdad</i> (telenovela – Mexico)	36. <i>La C.Q.</i> (series – Mexico, Venezuela)
26. <i>Sin tu Mirada</i> (telenovela – Mexico)	37. <i>Camino Hacia el Destino</i> (telenovela – Mexico)
27. <i>Tenías que Ser Tu</i> (telenovela – Mexico)	38. <i>El Hotel de los Secretos</i> (telenovela – Mexico)
28. <i>La Usurpadora</i> (telenovela – Mexico)	39. <i>Hoy Voy a Cambiar</i> (miniseries – Mexico)
<b>UniMás – 5</b>	40. <i>Mujer, Casos de la Vida Real</i> (unitary – Mexico)
29. <i>Apocalipsis</i> (telenovela – Brazil)	41. <i>Pasión y Poder</i> (telenovela – Mexico)
30. <i>Atrapada</i> (telenovela – Mexico, USA)	42. <i>Por Ella Soy Eva</i> (telenovela – Mexico)
31. <i>Morir en Martes</i> (telenovela – Mexico)	43. <i>Por Siempre Sebastián</i> (miniseries – Mexico)
32. <i>Rosario Tijeras</i> (telenovela – Mexico, Colombia, USA)	44. <i>Que Pobres Tan Ricos</i> (telenovela – Mexico)
33. <i>Tres Milagros</i> (telenovela – Mexico, USA)	45. <i>Rey David</i> (telenovela – Brazil)
	46. <i>Rosario Tijeras 1</i> (telenovela – Mexico, USA, Colombia)
	47. <i>Sansón y Dalila</i> (miniseries – Brazil)
	48. <i>Tierra Prometida</i> (telenovela – Brazil)
	49. <i>Tiro de Gracia</i> (telenovela – Colombia, Mexico, USA)
	50. <i>Yo No Creo en los Hombres</i> (telenovela – Mexico)
	<b>Fictions from non-Ibero American countries</b>
	1. <i>La Sultana</i> (telenovela – Turkey)
	2. <i>Amor Eterno</i> (telenovela – Turkey)

	3. <i>Niño Llamado Jesús</i> (miniseries – Italy) 4. <i>Entre Dos Amores</i> (telenovela – Turkey) 5. <i>El Sultán (rerun)</i> (telenovela – Turkey)  <b>TOTAL PREMIERE TITLES: 45</b> <b>TOTAL RERUN TITLES: 50</b> <b>GENERAL TOTAL TITLES: 95</b>
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Source: Obitel USA – Nielsen

In 2019, there were 45 premiere titles, only seven below the 52 that premiered in 2018. There were 12 new USA Hispanic productions from Telemundo, which is the same number that was produced by the network in 2018. However, the number of national productions was down from the 20 titles listed in 2018. This difference in the number of titles is caused by the absence of titles from Univision and UniMás in 2019, which is explained, on the one hand, because in 2018 these networks premiered some co-productions and, on the other hand, because the productions led by Patricio Wills and his production house W Studios for Televisa are being considered in this chapter not as USA Hispanic productions, but as Mexican ones. The total number of premieres and reruns in 2019 were 95, only seven titles below the 102 from 2018.

**Table 2. Premiere fiction in 2019: countries of origin**

Country	Titles	%	Episodes/ chapters	%	Hours	%
<b>NATIONAL (total)</b>	<b>12</b>	<b>26.7</b>	<b>512</b>	<b>20.1</b>	<b>512.3</b>	<b>20.1</b>
<b>OBITEL COUNTRIES (total)</b>	<b>33</b>	<b>73.3</b>	<b>2034</b>	<b>79.9</b>	<b>2036.1</b>	<b>79.9</b>
Argentina	0	0.0	0	0.0	0.0	0.0
Brazil	2	4.4	232	9.1	232.1	9.1
Chile	0	0.0	0	0.0	0.0	0.0
Colombia	3	6.7	215	8.4	212.8	8.4
Spain	0	0.0	0	0.0	0.0	0.0
<b>USA (Hispanic production)</b>	<b>12</b>	<b>26.7</b>	<b>512</b>	<b>20.1</b>	<b>512.3</b>	<b>20.1</b>
Mexico	28	62.2	1587	62.3	1591.3	62.4
Peru	0	0.0	0	0.0	0.0	0.0
Portugal	0	0.0	0	0.0	0.0	0.0

Uruguay	0	0.0	0	0.0	0.0	0.0
Venezuela	0	0.0	0	0.0	0.0	0.0
<b>CO-PRODUCTIONS (total)</b>	<b>14</b>	<b>0.0</b>	<b>682</b>	<b>0.0</b>	<b>681.7</b>	<b>0.0</b>
USA co-productions	12	0.0	559	0.0	559.6	0.0
Obitel co-productions	2	0.0	123	0.0	122.1	0.0
<b>TOTAL</b>	<b>45</b>	<b>100.0</b>	<b>2546</b>	<b>0.0</b>	<b>2548.4</b>	<b>100.0</b>

Source: Obitel USA – Nielsen

Mexico is the country that provided the most titles/episodes/hours in the industry in 2019. However, because of the differences of adjudication, Mexico now represents 62% of the broadcasted content, in contrast to the 48% of 2018. Meanwhile, the national production represented 20% of the content in hours, way below the 32% reported in 2018. Also, Brazil and Colombia are the other two main content providers.

With 35 titles, telenovelas are still the most important genre in the industry, representing 78% of the total premiered titles. It was only one title below the 36 telenovelas that premiered in 2018. If we consider the number of series and miniseries, all together there were five titles, seven titles below the 12 that premiered in 2018.

**Table 3. Formats of national and Ibero-American Fiction**

Formats	National					Ibero-American					
	Titles	%	C/E	%	H	Titles	%	C/E	%	H	%
Telenovela	8	66.7	467	91.2	466.30	27	81.8	1628	80.0	1630.73	80.1
Series	0	0.0	0	0.0	0.00	1	3.0	8	0.4	8.00	0.4
Miniseries	3	25.0	32	6.3	33.00	1	3.0	9	0.4	9.00	0.4
Telefilm	0	0.0	0	0.0	0.00	0	0.0	0	0.0	0.00	0.0
Unitary	1	8.3	13	2.5	13.00	4	12.1	389	19.1	388.33	19.1
Docudrama	0	0.0	0	0.0	0.00	0	0.0	0	0.0	0.00	0.0
Others (soap opera, etc.)	0	0.0	0	0.0	0.00	0	0.0	0	0.0	0.00	0.0
<b>Total</b>	<b>12</b>	<b>100.0</b>	<b>512</b>	<b>100.0</b>	<b>512.30</b>	<b>33</b>	<b>100.0</b>	<b>2034</b>	<b>100.0</b>	<b>2036.07</b>	<b>100.0</b>

Source: Obitel USA – Nielsen

**Table 4. The ten most watched titles on open television**

	Title	Country of the original idea/script	Network	Format/genre	N. of chap./ep. (in 2019)	Time slot	Rating	Share
1	<i>La Reina del Sur 2</i>	Spain	Telemundo	Telenovela	60	Prime time	8.7	20.4
2	<i>La Usurpadora</i>	Venezuela	Univision	Telenovela	25	Prime time	7.0	15.2
3	<i>Amar a Muerte</i>	Colombia	Univision	Telenovela	48	Prime time	6.4	14.6
4	<i>Mi Marido Tiene Más Familia</i>	South Korea	Univision	Telenovela	71	Prime time	6.3	13.1
5	<i>La Rosa de Guadalupe</i>	Mexico	Univision	Unitary	201	Prime time	6.0	13.6
6	<i>Betty en NY</i>	Colombia	Telemundo	Telenovela	123	Prime time	5.9	12.9
7	<i>Falsa Identidad</i>	USA	Telemundo	Telenovela	29	Prime time	5.8	12.1
8	<i>Ringo</i>	Argentina	Univision	Telenovela	18	Prime time	5.6	12.7
9	<i>Cuna de Lobos</i>	Mexico	Univision	Telenovela	25	Prime time	5.6	12.2
10	<i>El Señor de los Cielos 7</i>	USA	Telemundo	Telenovela		Prime time	5.4	13.3
<b>Total productions: 10</b>				<b>Foreign scripts: 8</b>				
100%								

Source: Obitel USA – Nielsen

The great ratings winner in 2019 was *La Reina del Sur 2*, a fictional program in which Telemundo invested a lot of resources in order to offer a show with the highest production values in the history of the network – and it worked. *Betty en Nueva York*, among the ten most watched titles, was also an important investment in a franchise that has produced great results for both Telemundo, with the broadcasting of *Yo Soy Betty, la Fea* in 2001, and ABC, with the show *Ugly Betty*. Meanwhile, the second place in the list is occupied by *La Usurpadora* from Univision, which is the short-version remake of the already legendary *La Usurpadora* (1998) made by Televisa. The remaking of these titles is a new strategy developed under a new brand/franchise, “The Dream Factory” (La Fábrica de

Sueños). *Cuna de Lobos* was also produced under this new franchise; it is also a short-version remake of the successful *Cuna de Lobos* (1986). This remake, broadcasted on Univision, achieved the ninth place in the list.

**Table 4a. The ten most watched national titles on open television**

	Title	Country of the original idea/script	Network	Format/genre	N. of chap./ep. (in 2019)	Time slot	Rating	Share
1	<i>La Reina del Sur 2</i>	Spain	Telemundo	Telenovela	60	Prime time	8.7	20.4
2	<i>Betty en NY</i>	Colombia	Telemundo	Telenovela	123	Prime time	5.9	12.9
3	<i>Falsa Identidad</i>	USA	Telemundo	Telenovela	29	Prime time	5.8	12.1
4	<i>El Señor de los Cielos 7</i>	USA	Telemundo	Telenovela	50	Prime time	5.4	13.3
5	<i>Jugar con Fuego</i>	Brazil	Telemundo	Miniseries	9	Prime time	5.4	11.1
6	<i>La Reina Soy Yo</i>	Colombia	Telemundo	Telenovela	77	Prime time	5.2	12.2
7	<i>Al Final del Paraíso</i>	Colombia	Telemundo	Telenovela	82	Prime time	5.2	11.6
8	<i>Preso n.º 1</i>	Israel/USA	Telemundo	Telenovela	44	Prime time	4.2	10.6
9	<i>Señora Acero 5</i>	USA	Telemundo	Telenovela	20	Prime time	4.2	9.5
10	<i>No te Puedes Esconder</i>	USA	Telemundo	Telenovela	10	Prime time	3.6	8.4
<b>Total productions: 10</b>				<b>Foreign scripts: 6</b>				
100%				60%				

Source: Obitel USA – Nielsen

Table 4a is dominated by Telemundo productions, in particular the two big bets of this network: *La Reina del Sur 2* and *Betty en Nueva York*, both fictions from very successful network franchises.

**Table 5. Audience profile of the ten most watched titles:  
gender and age**

	Title	Network	Gender %	
			Women	Men
1	<i>La Reina del Sur 2</i>	Telemundo	58.5	41.5
2	<i>La Usurpadora</i>	Univision	65.1	34.9
3	<i>Amar a Muerte</i>	Univision	65.8	34.2
4	<i>Mi Marido Tiene Más Familia</i>	Univision	64.1	35.9
5	<i>La Rosa de Guadalupe</i>	Univision	62.7	37.3
6	<i>Betty en Nueva York</i>	Telemundo	59.4	40.6
7	<i>Falsa Identidad</i>	Telemundo	57.6	42.4
8	<i>Ringo</i>	Univision	60.9	39.1
9	<i>Cuna de Lobos</i>	Univision	65.1	34.9
10	<i>El Señor de los Cielos 7</i>	Telemundo	56.5	43.5

	Title	Network	Age group %					
			2-11	12-17	18-24	25-34	35-49	50+
1	<i>La Reina del Sur 2</i>	Telemundo	6.7	3.1	5.5	14.7	30.5	39.6
2	<i>La Usurpadora</i>	Univision	10.8	4.0	5.4	14.0	26.2	39.7
3	<i>Amar a Muerte</i>	Univision	10.9	3.5	6.7	11.1	27.3	40.5
4	<i>Mi Marido Tiene Más Familia</i>	Univision	13.2	4.6	4.9	10.9	24.7	41.8
5	<i>La Rosa de Guadalupe</i>	Univision	14.4	5.2	5.2	12.5	23.2	39.4
6	<i>Betty en Nueva York</i>	Telemundo	8.0	3.7	6.5	13.2	26.5	42.2
7	<i>Falsa Identidad</i>	Telemundo	6.2	2.6	5.0	11.9	28.3	45.9
8	<i>Ringo</i>	Univision	11.6	5.2	4.9	14.2	21.0	43.0
9	<i>Cuna de Lobos</i>	Univision	8.9	3.3	5.6	11.7	28.5	41.9
10	<i>El Señor de los Cielos 7</i>	Telemundo	9.3	3.3	5.6	16.5	29.7	35.4

Source: Obitel USA – Nielsen

The audience demographic profiles of *La Reina del Sur 2* and *El Señor de los Cielos 7* show that these titles attract young male audiences, as both occupy first place in the 25 to 49-year-old demo. They also rank high in the 18 to 25-year-old demo audiences. Meanwhile, *La Usurpadora* and *Amar a Muerte*, the second and third place respectively, both have the highest percentages in female audiences.

### **3. VoD monitoring**

The growth of streaming and VoD industries has had a profound effect on the reorganization of the telecommunications, media and computer industries. This reordering is reflected in the increasing number of players entering the competitive VoD market, but also in a new period of vertical and horizontal corporate concentration never seen before. New players are being added to the market in which Netflix, Amazon and Hulu have been the dominant players, such as Disney+, AppleTV+ and soon HBO Max, from WarnerMedia, and Peacock, from Comcast/NBC. However, they are not the only ones; YouTube, Google Play, Microsoft, Sony and other giants of the industry are looking to get a larger piece of the pie. One of the essential elements in the race for the market is copyright of broadcasting content, something that Netflix understood very early, when it launched its global strategy, which was not only about penetration through distribution in the world market, but also included production of original content in different global latitudes.

#### **3.1. VoD in the USA Hispanic market**

In terms of platforms specifically targeting the Spanish-speaking population in the United States, the landscape shows that the dynamics and tensions of a specific linguistic, technological and cultural market give rise to two options among the market of VoD: it gets assimilated as part of the American English language national market, or it gets segregated. In spite of the vitality of the subscription VoD (SVoD) platform industry in the United States, the creation of titles specifically designed for Spanish-speaking audiences is almost inexistent. Paradoxically, the increasing number of digital platforms to stream USA Hispanic content, particularly in Spanish, is tied to the dynamics of the Hispanic television networks, which produce a very limited offer.

This specific industrial circumstance pushed digital platforms to become, for the most part, a new space for the reprise of shows, or an accessible window for archival content which had already been

released in the broadcasting USA Hispanic networks. This condition had a key effect, with almost no Hispanic content on SVoD platforms, because that content was already premiered in the traditional television broadcasting windows. For instant, productions such as *Luis Miguel*, *El Chapo* and now *La Reina del Sur 2*, which were made as co-productions with Netflix, premiered first on Telemundo and Univision, before the digital platform, so they do not count for the VoD premiere titles. Thus, as Chart 2 shows, there is an increasing number of digital windows to access content from the very different open and pay Hispanic television networks, but in fact they only function as digital archives of the very same material that the networks have already offered.

**Chart 2. VoD in the United States**

	<b>Platform</b>	<b>Total</b>
<b>VoD linked to open TV networks</b>	<p><b>Official portals (5):</b> Univision, UniMás, Telemundo, EstrellaTV, AztecaAmerica</p> <p><b>YouTube (21):</b> Univision, Univision Noticias, Uninovelas, Nuestra Belleza Latina, Primer Impacto, Despierta América, Horoscpos Univision, UniMás; Telemundo, Telemundo Noticias, Telemundo Deportes, Telenundo Novelas, Caso Cerrado, Un Nuevo Dia, Al Rojo Vivo; EstrellaTV, EstrellaTV Comedias, Tengo Talento Mucho Talento, Noches de Platanito, Rica Famosa Latina; Azteca America</p> <p><b>Apps (12):</b> Univision App, Uforia Music, UnivisionNow, UnivisionNoticias, Univision Local Stations; Telemundo Entertainment, Telemundo Deportes, Telemundo Noticias, TDUN, Telemundo Capítulos Completos, Telemundo Local Stations; Azteca America.</p>	<b>38</b>
<b>VoD linked to pay TV (only the ones targeting Hispanic population)</b>	<p><b>Official portals (65):</b> pay Hispanic networks (29), networks dubbed or subtitles in Spanish (12), Latin American or European networks targeting Latinos (24)</p> <p><b>YouTube (56):</b> Hispanic networks (22), dubbed in Spanish networks (9), Latin American or European networks (25)</p> <p><b>Apps (32):</b> pay Hispanic networks (11), dubbed in Spanish pay TV networks (12), Latin American or European networks (9)</p>	<b>153</b>

<b>VoD linked to telecommunication companies</b>	<b>Main telecommunication corporations (9):</b> ATT/ DirecTV (ATT/WarnerMedia), Fios (Verizon), Xfinity (Comcast), Spectrum (Charter Communications), T-Mobile TV (T-Mobile/Spring), Century Link, Dish (Dish Network Corporation), Cox (Cox Communications), Optimum and Suddenlink (Altice USA) <b>Virtual multichannel video programming distributors (VMVPD) (7):</b> Sling TV (Dish), AT&T Now (DirecTVNow ATT/WarnerMedia), PlayStation Vue (Sony), YouTube TV (Google), Hulu Live (Disney, Comcast), Fubo TV (FuboTV), Philo (Philo).	<b>16</b>
<b>VoD with no links to TV networks</b>	<b>SVOD Services (25):</b> Netflix, Hulu, iTunes, Amazon Prime, Disney+, AppleTV+ (Apple), Crackle, Google Play Movies & TV, SkyGo, YouTube Prime, Microsoft Movies & TV (Xbox Video), CBS All Access (CBS), Vudu (Wallmart), Fandor, Shudder (AMC Networks), NBA TV (NBA/ATT Warner Media), Crunchy Roll (ATT Warner Media), Mubi, Vimeo (IAC), Vemox (Olympusat), Pluto TV (Viacom/CBS), Android TV (Google), IndieFlix, Popcornflix (Screen Media Ventures), SnagFilms, Pantaflix, Pantaya (Lionsgate), Flix Latino (Somos TV LCC), Curiosity Stream, Noggin, Flama	<b>31</b>
<b>TOTAL</b>		<b>238</b>

### 3.2. Earnings from VoD systems

Netflix's operation costs increased as the corporation grew globally and invested in content production, but its revenues also increased. The company's net revenues doubled from 2016 to 2019, while net profits increased tenfold (yes, ten times), from US\$ 186 million in 2016 to US\$ 1.8 billion in 2019. Amazon, the matrix company of Amazon Prime Video, reported net revenues of US\$ 3.3 billion in 2019, an increase from the US\$ 3 billion gained in 2018. Hulu, a property of Disney, reported subscription net revenues of US\$ 1.2 billion, and US\$ 670 million from advertising.

### 3.3. VoD analysis in 2019: national and Ibero-American premiere fiction

In 2019, Netflix, Amazon and Hulu together launched 3,979 film and television titles, which consisted of both reprises and premieres. Out of that number, 1,100 titles were television programs, of which 542 were programs with fictional content, and only 132 were premiere titles. The premiere of 132 titles through these three

platforms speaks to the power of these windows of delivery in the context of the increasing demand for fictional content in the United States, but also around the world. Only Netflix had almost 100 premiered titles, and around 150 titles if we take into account the different productions made by the platform at global levels, which underscores its increasing new role as a producer of original content.

**Table 6. National and Ibero-American titles broadcasted on VoD in 2019**

Premiere national titles	Premiere Ibero-American titles	Co-productions (USA)
<p><b>Netflix – 62 titles</b> 62 English language titles (there was only one premiere title with a full Latino cast: <i>One Day at a Time</i>)</p> <p><b>Amazon – 16 titles</b> 16 English language titles</p> <p><b>Hulu – 17 titles</b> 17 English language titles</p>	<p><b>Netflix – 25 titles</b></p> <ol style="list-style-type: none"> <li><i>El Marginal 3</i> (series – Argentina)</li> <li><i>Monzón</i> (series – Argentina)</li> <li><i>Coisa Mais Linda</i> (series – Brazil)</li> <li><i>O Escolhido 1</i> (series – Brazil)</li> <li><i>O Escolhido 2</i> (series – Brazil)</li> <li><i>Sintonía</i> (series – Brazil)</li> <li><i>Irmandade</i> (series – Brazil)</li> <li><i>Ninguém Tá Olhando</i> (series – Brazil)</li> <li><i>Las muñecas de la mafia 2</i> (telenovela – Colombia)</li> <li><i>Frontera Verde</i> (miniseries – Colombia)</li> <li><i>El Bandido Honrado</i> (telenovela – Colombia)</li> <li><i>Vivir Sin Permiso</i> (series – Spain)</li> <li><i>Si No te Hubiera Conocido</i> (series – Spain)</li> <li><i>El Sabor de las Margaritas</i> (series – Spain)</li> <li><i>Alta Mar</i> (series – Spain)</li> <li><i>Paquita Salas</i> (series – Spain)</li> <li><i>La Casa de Papel</i> (series – Spain)</li> <li><i>45 rpm</i> (series – Spain)</li> <li><i>La Víctima Número 8</i> (series – Spain)</li> <li><i>Vis a Vis</i> (series – Spain)</li> <li><i>Elite 2</i> (series – Spain)</li> <li><i>Las del Hockey</i> (series – Spain)</li> </ol>	<p><b>Netflix – 17 titles</b></p> <ol style="list-style-type: none"> <li><i>Go! Vive a tu Manera 1</i> (series – Argentina, USA)</li> <li><i>Go! Vive a tu Manera 2</i> (series – Argentina, USA)</li> <li><i>Apache: La Vida de Carlos Tevez</i> (series – Argentina, USA)</li> <li><i>Samantha! 2</i> (series – Brazil, USA)</li> <li><i>Los Briceño</i> (telenovela – Colombia, USA)</li> <li><i>Distrito Salvaje</i> (series – Colombia, USA)</li> <li><i>Siempre Bruja</i> (series – Colombia, USA)</li> <li><i>Bolívar</i> (telenovela – Colombia, USA)</li> <li><i>Las Chicas del Cable</i> (series – Spain, USA)</li> <li><i>Brigada Costa del Sol</i> (series – Spain, USA)</li> <li><i>Tres Días de Navidad</i> (miniseries – Spain, USA)</li> <li><i>Club de Cuervos 4</i> (series – Mexico, USA)</li> <li><i>Tijuana</i> (telefilm – Mexico – USA)</li> <li><i>Historia de un Crimen</i> (series – Mexico, USA)</li> <li><i>Yankee</i> (series – Mexico, USA)</li> <li><i>La Casa de las Flores 2</i> (series – Mexico, USA)</li> </ol>

	23. <i>Hache</i> (series – Spain) 24. <i>Marea Alta 2</i> (series – Spain) 25. <i>Vis a Vis 2</i> (series – Spain)  <b>Amazon Prime – 0 titles</b>  <b>Hulu – 0 titles</b>	17. <i>El Club</i> (series – Mexico, USA)  <b>Amazon – 1</b> 18. <i>Diablo Guardian 2</i> (series – Mexico, USA)
<b>Total: 95</b>	<b>Total: 25</b>	<b>Total: 18</b>
<b>GENERAL TOTAL: 138</b>		

Source: Obitel USA

Netflix, a video distribution platform, now has content production as central strategy for growth, with original production in the United States since 2013, followed by Netflix’s incursion as a content producer across Latin America. As a way to capture Netflix penetration across the region and, at the same time, recognize the nations where these titles were produced – embedded in the local language and culture –, these titles will appear listed as “co-productions”. These television products have local narratives, spoken in Spanish or Portuguese, with local talent and professionals, which underscores the strategy that I have defined as “manufactured cultural proximity” (Piñón, 2014a). One of the most salient features of these USA television products is that they are produced by Latin American independent production houses, which have a double function: first, to reach the targeted national audiences from the market where these fictions are produced; and, second, to produce content that goes back to the USA market and satisfies the demand of its Hispanic audiences. Some consequences of this regional strategy have been the erasure of original USA Hispanic production for SVoD platforms, and the rise of Latin American content produced by these platforms across the region.

**Table 7. VoD premiere fiction in 2019: countries of origin**

Country	Titles	%
<b>NATIONAL (total)</b>	<b>113</b>	<b>81.9</b>
<b>OBITEL COUNTRIES (total)</b>	<b>25</b>	<b>18.1</b>
Argentina	2	1.4
Brazil	6	4.4
Chile	0	0.0
Colombia	3	2.2
Spain	14	10.1
USA	113	81.9
Mexico	0	0.0
Peru	0	0.0
Portugal	0	0.0
Uruguay	0	0.0
Venezuela	0	0.0
<b>CO-PRODUCTIONS (total)</b>	<b>18</b>	<b>13.0</b>
USA-Obitel co-productions	18	13.0
Co-productions between Obitel countries	0	0.0
<b>GENERAL TOTAL</b>	<b>138</b>	<b>100.0</b>

Source: Obitel USA

Table 7 illustrates the paradox faced by Mexico, as a key country in the Netflix strategy of production: it has six titles, but which count as USA Netflix productions. This number is reflected in the “co-production line”, but it leaves Mexico without a title. Otherwise, Argentina, Brazil, Colombia and Spain, as television centers of production across the region, play a central role in the distribution of successful Hispanic and Latin American content in the USA and regional SVoD markets.

**Table 8. Formats of national and Ibero-American fiction on VoD**

Format	National				Ibero-American			
	Title	%	C/E	%	Title	%	C/E	%
<b>Telenovela</b>	2	1.8	123	10.4	2	8.0	123	38.7
<b>Series</b>	96	85.0	942	79.6	22	88.0	187	58.8
<b>Miniseries</b>	10	8.8	70	5.9	1	4.0	8	2.5
<b>Unitary</b>	4	3.5	37	3.1	0	0.0	0	0.0
<b>Others</b>	1	0.9	11	0.9	0	0.0	0	0.0
<b>Total</b>	113	100.0	1183	100.0	25	100	318	100.0

Source: Obitel USA

Table 8 overwhelmingly shows the preference for series, which in number of titles represents 85.5% of the total premiered titles (national and Ibero-American), followed by miniseries, which represents 9% of the total. However, in spite of the fact that, in terms of number of titles, telenovelas represent only 2.5% of the total, their presence in number of episodes rises to 16.3%, in contrast to 5.2% of miniseries episodes, which made telenovelas' presence more meaningful.

#### **4. Fiction analysis: open TV, VoD and transmedia expressions in networks**

The most visible theme or event on social media in 2019 was the anticipation generated by Telemundo when it announced that Rafael Amaya would return as Aurelio Casillas in the seventh season of *El Señor de los Cielos*. This announcement was coupled with the warning that this would be the last season of the franchise. After this announcement, the subject gained traction on social media, as fans wondered if Aurelio Casillas would wake up from the coma in which he was put in the middle of the sixth season. The lack of clarity from the network and the invisibility of Rafael Amaya himself in the media only created more speculation about the fate of Aurelio and the franchise. The network took advantage of the confusion to



As a result, the superseries suffered a significant audience decline. The long-standing value of the franchise, however, allowed *El Señor de los Cielos 7* to position it among the ten most watched fiction titles of the year. But it was clear that the audience decline forced the network to cut short the number of episodes and declare an early end of the season. Still, the network opened the door for a possible reappearance of Aurelio in the last episode. In spite of it, the final episode of the franchise saw a dive in viewership with only 1.3 million spectators, well below the 1.9 million that tuned in for the first episode. Since then, Rafael Amaya has been hidden from public life, and people on social media keep asking what happened to him, triggering more speculation and keeping interest in the actor quite alive.



## 5. Highlights of the year

The different fictional franchises – their new seasons and re-makes – were the source of high ratings in the USA Hispanic television market during the year. With the broadcast of new seasons of its most successful fiction titles, the USA Hispanic industry bet for certainty. In particular, the short versions of successful telenovelas and the launch of miniseries were an increasing phenomenon. In this domain, biopics are still a key audiovisual product, and the biblical series from Brazil still have an important presence in prime time. A novelty is the inclusion of Turkish telenovelas in prime time.

News and information are essential roles played by the TV networks, once there is no information about Latinos on English-speak-

ing open TV channels. The networks followed up the immigration of people from Mexico and Central America, the crisis of the migrants claiming asylum in the United States, as well as the increase of xenophobia acts in the country, such as the massacre of Latinos in El Paso, Texas. The networks also covered the Democratic Party primaries, organizing debates in the units of government.

## **6. Theme of the year: melodrama in times of streaming<sup>11</sup>**

The offer of fictional formats such as short series or miniseries on digital platforms, such as Netflix, Amazon and Hulu, has pushed the Spanish-language television industry to find a competitive product for digital consumption practices that at the same time aligns to broadcasting production and distribution television dynamics. In this context, Telemundo decided to create a new brand: Series Premium, which have around ten episodes, high production values, and innovative and riskier narratives, while keeping with the quotidian dynamics of Monday to Friday broadcasting emissions (Piñón, 2019).

The first product of this brand was *El Recluso*, which is a remake of the successful Argentinean series *El Marginal*. *El Recluso* premiered on September 25, 2018 and was aired from Monday to Friday for two weeks, which made it unique in the context of Hispanic language television. In 2019, Telemundo co-produced with Globo *Jugar con Fuego*, another fictional content series from the Series Premium brand, in this case a remake of the Brazilian series *Amores Roubados*. This brand is part of the initial goal of Telemundo International Studios, whose foundation was to produce short fictional content designed to satisfy the increasing demand from international markets and on digital platforms.

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<sup>11</sup> This section is based on Cassano et al. (2019).

### 6.1. *Jugar con Fuego*

*Jugar con Fuego* is the story of Fabricio Ramirez, a Mexican that arrives in Armenia, Colombia, a traditional coffee production region, where he will meet three women, Camila, Martina and Andrea, changing their destiny and his own. At first sight, the plot seems to be framed in the classic melodramatic tradition: unknown identities and passions that, when released, can produce tragic outcomes, but with the hope that at the end the leading couple will prevail with the power of love or truth. But this is not the case with *Jugar con Fuego*.

The central plot and the key element that unleashed a series of conflicts is the disruptive presence of Fabricio. He is an intelligent and attractive man with an unknown past, but with a subtle and erotic charisma that allows him to conquer any women he desires. Fabricio wants to enjoy everything life offers, particularly in relation to women, who seem to be his greatest weakness. They fall in love with Fabricio, he enjoys them and travels the path of his own journey of discovery just to abandon them at the end; he is not driven by evilness, but by hedonistic desires and a lack of self-consciousness. In the process we learn that he has an empty heart, which he wants to fill with his different adventures and which is the product of a childhood with many deficiencies, since his mother was a prostitute and he grew up in the toxic environment of a brothel. Fabricio is always on the run because he is always involved in problems, triggering the ire of men being cheated on by their women or defrauded by him. He is neither a bad nor a good guy. He is selfish. Fabricio's attitude can be explained by the premonition that a seer made about him: she asserted that he can get any women that he wants and he can run away harmlessly from any daunting situation in which he finds himself, but, if he falls in love, that will seal for him a deadly fate.

In his selfishness, Fabricio gets involved in an affair with Camila Peláez, a beautiful woman married to Peter Miller. Camila is a young woman that irradiates life, and Peter is an old but rich man. Thus, their relationship is understood as a *quid pro quo* situation:

Camila provides beauty, company and caresses to Peter, while he provides her a luxurious way of life. At first sight, Camila seems to be a gold-digger taking advantage of Peter's wealth and position. The sexual encounters of Camila and Fabricio are defined by the forbidden and the hidden, and a sense of betrayal, risk, and pleasure. The series begins with them in a sexual encounter, promising a plot full of unrestrained passion and sexual desire. At this point, both are accomplices in their infidelities. Over time, Camila becomes more demanding and controlling. During this affair with Camila, and despite her controlling behavior, Fabricio meets Martina Gaiani, a beautiful mature woman married to Jorge Jaramillo. Martina and Camila are best friends.

Jorge Jaramillo is the authority in the region. He has a hacienda with many workers and an upper-class lifestyle, proper to that of a large business owner in Colombian rural settings. Jorge is the patriarch, the alpha male. He manages his hacienda with a heavy hand, in the same way that he manages his family: wife and daughter. In spite of that, Fabricio decides to conquer Martina, but in stark contrast to the way he has done it with Camila. Martina is soft, intelligent, delicate and quiet. She is a woman that has been faithful to her husband, who has victimized her for years, making her feel trapped and dead inside. Fabricio whispers sensually into her ears offering poetry, and she crumbles. In the love conquest game, Martina falls in love and becomes obsessed with Fabricio. However, another character interrupts this process: Andrea Jaramillo Gaiani. Daughter of Martina and Jorge, Andrea is a young, beautiful woman with an independent spirit, always looking to free herself from her father's controlling impulses and the oppressive traditions and social dynamics of the town where she grew up. Andrea has just come back from Miami; she is an educated woman with a progressive agenda; she takes photos as a way to capture social realities, such as the faces of the common people in the town, or the workers of his father's coffee plantation.

So, during the process of Martina's sensual awakening, Fabricio unexpectedly shares a life-or-death situation with her daughter, Andrea, whom he has been ignoring all along because of some previous unfortunate encounters with her. But a stroke of luck puts them together again, and they fall in love with each other, as if in a spell. For the first time Fabricio is in love and can see his own shortcomings. He tries to redeem himself and he wants to be honest. Then, he reconciliates with his mother and tries to escape with Andrea to follow a dream of stability and love in Miami. But falling in love will be his fatal mistake.

### ***Compressed time***

The time of actions in each episode seems to vary between one to two days, and its clearly marked by sunsets and sunrises. Because of this, the story, told in ten episodes of one hour each, seems to have a temporal arch of around a month. However, in the first episode of the miniseries, we are told that one of the final scenes will happen six months later after the starting point of the series plot.

### ***Suspended time***

The miniseries had a daily transmission, so there was a suspended time of 24 hours between the cliffhanger from the end of an episode and the new episode in the next day. This was only modified by the weekend hiatus.

### ***Manipulated time***

The future (prolepsis): as a strategy of engagement, the first sequence of the series starts in the future. The drama evolving the scenes reveal that we are somehow witnessing a possible tragedy.

The past (flashback): during the plot, flashbacks are used to reveal the past and the identity of the leading characters. But, in this case, only the assumed leading character, Fabricio, offers a window to his past.

### ***Summarized time***

Because of the compressed nature of the series, and maybe because I had access to the series on Netflix, redundancy is highly avoided, as the purpose is to show a narrative that flows like a literary work, a book, which can be read from the start to the end in a few days. In this case, when the episode starts, there is a recapitulation of how the previous episode finished. But it changes when you watch the series in binge mode on a digital platform: understanding that you have just finished watching the previous episode, the platform skips the *racconto* and does not need to remind you of anything.

### ***Seriality and continuity***

The temporal gaps leave in suspense the continuity of the narrative world, so another aspect that needs to be analyzed is continuity. In the context of the general plot, it is possible to find at least five main narrative arches, some of them overlapping, but all more or less well demarcated. The first three are linked to Fabricio's relationship with each of the three women; the last two, with the resolution of the series:

- Camila and Fabricio;
- Martina and Fabricio;
- Andrea and Fabricio;
- persecution and death;
- revelation, punishment, and the women's renovation.

### ***Short subplots***

Within the fictional world, men have tasks to perform. Most of them have operational goals, which can be achieved in a short term. Other short subplots happen around secondary characters.

The narrative does not fully fit with what is conceptualized as the melodramatic matrix, which operates under the binary moral universe of victim and victimizer. It offers a more subtle take on the genre. But, indeed, the narrative strategy can be situated within the domain of melodrama, in which there is a process of cognition

and recognition taking place in the midst of betrayal, unrestrained passions, and unknown identities, all within the space offered by the fabric of family relationships, social inertia, and tradition. Even though the plot is not absent of villains, victims and victimizers, it is also populated by complex characters that grow and change, a characteristic that seems to be linked more to the tragic than to the melodramatic tone.

*Jugar con Fuego* follows Miami's model of production, with a cast integrated by a variety of actors from very different latitudes: Peru, Mexico, Colombia, Venezuela and the United States. On the one hand, the fiction is developed in the context of a middle upper-class subjectivity, with luxury and beautiful and glamorous women; on the other hand, it recreates the rural landscape of the hacienda, offering nostalgia for the nation and the homeland (in Latin America), which has been used as a narrative magnet in telenovela for decades. In this format, the American dream persists, but is incarnated as the possibility of a new and free life in Miami.

*Jugar con Fuego* is also a crude and intimate description of a patriarchal system that is violent to women in their positions as mother, daughters and friends. It becomes a modern tragedy in which a man – with the power of his masculinity translated as eroticism, and without knowing it – puts at risk the whole fabric of a social network supported by a patriarchal system under which the quiet town of rural Armenia has lived for decades or centuries.

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## URUGUAY: IBERO-AMERICAN FICTION LOSES GROUND TO ENTERTAINMENT

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### Introduction

A look at the screens of Uruguay's open television in prime time will give the viewer a very reduced offer: after a television newscast that exceeds two hours long, there are only contest programs, national or imported ones. It is possible that in the afternoon and at night the viewer finds a telenovela, almost always Turkish one. This is a very different panorama from the Uruguayan television history. Ibero-American fiction is in decline on open television, while its offer on VoD expands.

In this chapter we will try to consider the various aspects of this landscape. Melodrama is on both options, open television and streaming, on a broad thematic spectrum, even in productions that are not usually classified as such. In the absence of national fiction in the period, at the end of the chapter we will study the melodrama in prison fiction, particularly in the case of *El Marginal*.<sup>1</sup>

## 1. Uruguay's audiovisual context in 2019

### 1.1. Open TV in Uruguay

Uruguayan open television system remains unchanged: made up of three private and two public channels, TNU with a national

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<sup>1</sup> This is an Argentinian series released on Argentinian public television in 2016. Its three seasons are available for Uruguay on Netflix.

scope and TV Ciudad, an open digital channel linked to the government of Montevideo, with a national scope only in digital signal.

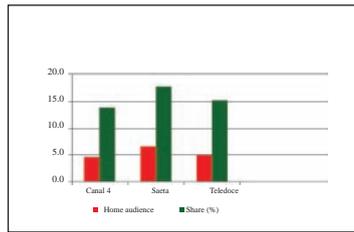
**Chart 1. National chains/channels of open TV in Uruguay**

Private chains/channels (3)	Public chains/channels (2)
Canal 4 (channel 4) Saeta (channel 10) Teledoce (channel 12)	Televisión Nacional del Uruguay – TNU (channel 5) TV Ciudad
<b>TOTAL CHANNELS= 5</b>	

Source: Obitel Uruguay

**Graph 1. TV rating and share by channel<sup>2</sup>**

Channel	Home audience	Rating (%)	Share (%)
Saeta	6.4	38.55	18.1
Teledoce	5.3	31.93	15.2
Canal 4	4.9	29.52	13.8
TNU	-	-	-
<b>TOTAL</b>	<b>16.6</b>	<b>100.00</b>	<b>47.1</b>



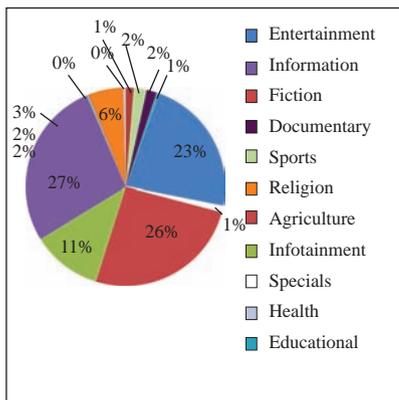
Source: Kantar Ibope Uruguay

The data showed a new decline in the open television audience: the rating dropped almost two points from the previous year and so did the share, which was at 55.8% in 2018 and fell to 47.1% in 2019, confirming that the audience preferred other types of television consumption. Looking back, 2013 was the last year in which it reached an average rating of 22 points and 60% of share, and we were already pointing out the low audience for open television.

<sup>2</sup> It should be noted that graphs 1 and 2 were prepared only with information from the three private channels. The exclusion of the national public channel, TNU, is due to the fact that audience measurements are not available, neither from Kantar Ibope nor from the channel itself. Regarding the programming hours by genre, we rebuilt as much as possible the information corresponding to this channel, but, not having the same quality as that of the rest of the channels, we decided not to include it, except in what refers to the released Ibero-American fiction (Table 2).

**Graph 2. Genres and hours broadcast on TV programming on private channels**

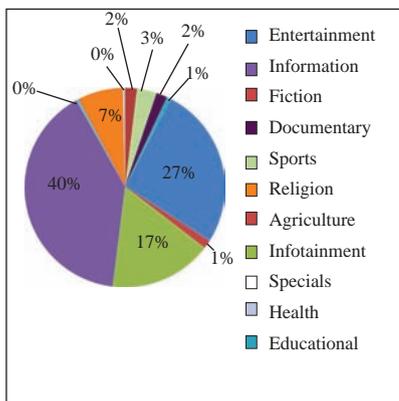
Broadcast genres	Exhibition hours	%
Information	4759:45:00	27.25
Fiction	4501:21:00	25.77
Entertainment	3930:15:45	22.50
Infotainment	1986:57:00	11.38
Religion	1015:25:30	5.81
Sports	383:02:15	2.19
Documentary	294:32:15	1.69
Agriculture	209:03:45	1.20
Specials	197:09:45	1.13
Educational	81:56:15	0.47
Health	56:30:00	0.32
Others	49:14:15	0.28
<b>TOTAL</b>	<b>17465:12:45</b>	<b>100.00</b>



Source: Obitel Uruguay on Kantar Ibope data

**Graph 2a. Genres and hours of national production broadcast on private channels**

Genres	Exhibition Hours	%
Information	4759:45:00	39.84
Entertainment	3169:45:45	26.53
Infotainment	1986:57:00	16.63
Religion	864:50:15	7.24
Sports	383:02:15	3.21
Documentary	233:46:30	1.96
Agriculture	209:03:45	1.75
Specials	151:13:30	1.27
Educational	81:56:15	0.69
Health	56:30:00	0.47
Others	49:14:15	0.41
Fiction	00:00:00	0.00
<b>TOTAL</b>	<b>11946:04:30</b>	<b>100.00</b>



Source: Obitel Uruguay on Kantar Ibope data

The television broadcast time is predominantly occupied by three genres: information, fiction and entertainment. The predominance of information is explained by the duration of the newscasts (more than two hours) and also because 2019 was an electoral year, which led to the appearance of some journalistic programs of political character. The historical trend of predominance of these three categories continues, but the most relevant aspect is that information becomes the genre that occupies the largest number of hours.

National production occupied 68% of the total broadcast time, but national fiction is absent from the production and programming decisions of private channels. From 2013 onwards, there is an increase in the number of hours devoted to national production, but the channels' focus was on information, entertainment and infotainment.

## 1.2. Pay TV

According to the latest data available in 2018, there had been a slight increase in the number of television services for subscribers (735,041 compared to 719,823 in 2017), which could show an interruption of the downward trend that had been observed since 2016.<sup>3</sup> The data for the year 2019 is not yet available, however the representatives of the television companies for national subscribers expressed by mid-year that the sector is experiencing a period of uncertainty due to the new communication technologies and internet piracy. The Uruguayan Chamber for Pay Television (Cuta) raised the need for appropriate actions according to the moment in terms of pricing and purchasing conditions of the contents, together with the action of the State.<sup>4</sup>

The dominant companies in 2018 were Cablevisión, with 23% of the services, and DirecTV, with 20%, both foreign, followed by

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<sup>3</sup> <https://www.ursec.gub.uy/inicio/transparencia/informacion-estadistica-y-de-mercado/telecomunicaciones/>

<sup>4</sup> [https://www.youtube.com/watch?v=gdk9TGd9PqY&feature=emb\\_title](https://www.youtube.com/watch?v=gdk9TGd9PqY&feature=emb_title)

national TCC, with 18%, Nuevo Siglo, with 17%, and Montecable, with 15%.<sup>5</sup>

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

Global reports on advertising spending forecast that by 2021 the internet will get more than 50% of the investment and television will get 27%.<sup>6</sup> However, in Latin America, television continues to be central to advertising investment. In Uruguay, the same trends are evident: since 2016 there has been a gradual advertising investment growth on the internet, but television continues to be the medium that concentrates 90.27% of the total advertising for radio, press and outdoors, according to data by Kantar Ibope Uruguay.

As it has been constant in our previous reports, the investment figures in fiction are not available and we only have the data for seconds of advertising campaign in fiction: in 2019 it was 1,932,705 seconds, a slight decrease compared to 2018 (2,092,605). The main advertisers in fiction programs were Teleshopping (218,831 seconds), Unilever (132,937), *El País* (110,585), SC Johnson (103,248) and Fucac (69,802). They are three foreign multinational companies and two national ones: a press media outlet and a financial services cooperative<sup>7</sup>.

### 1.4. Communication policies

In June 2019, the Presidency of the Republic finally signed the regulation of the Audiovisual Communication Services Law (LSCA), passed in late 2014. The most relevant consequence of this action was the inclusion of sign language in the news. Expansion to a wider range of programs is pending, and the addition of audio de-

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<sup>5</sup> <https://www.ursec.gub.uy/inicio/transparencia/informacion-estadistica-y-de-mercado/telecomunicaciones/>

<sup>6</sup> <https://www.elobservador.com.uy/nota/asi-sera-el-gasto-en-publicidad-en-2021-2019927182433>

<sup>7</sup> According to Kantar Ibope Uruguay, data from Monitor Evolution.

scription has not been included in the regulation. On the other hand, at the end of Frente Amplio's government, the Audiovisual Communication Council was not appointed; therefore, the institutional framework that the LSCA had created did not fully function. The new government announced the repeal of eight articles that in some sections had already been declared unconstitutional.

The LSCA established that subscription television companies must include in their grid three national channels, with 80% of national production. In October 2019 the call for competition was made and in December the public hearing was held. Different actors questioned that this call and the channel allocations were made within a few months of the change of government, which had already announced it would pass new legislation. The applicant channels were: Cardinal SA, a signal belonging to the Uruguayan Chamber for Pay Television (Cuta) focused on covering news from the Uruguayan countryside; Eutopía TV, headed by Federico Fasano, former director and founder of the newspaper *La República*, which now starts this medium for journalistic content; TV Libre (RTV), founded in 2003 and belonging to the multimedia that includes the newspaper *La República* and the Uruguayan radio AM Libre (AM 1410); Canal U (Unión Continental Latinoamérica), founded in 2013, with Uruguayan and Latin American content. The results released in February 2020 showed the last three as winners.<sup>8</sup> The affinity of the winners with Frente Amplio, the outgoing government party, sharpened criticism.

## 1.5. Digital and mobile connectivity infrastructure

According to the Survey on the Use of Information and Communication Technologies (Eutic)<sup>9</sup>, in 2019 the number of house-

<sup>8</sup> <https://www.elobservador.com.uy/nota/como-son-los-proyectos-de-canales-de-tv-de-fasano-la-republica-y-canal-u-202021918530>

<sup>9</sup> This survey is carried out by the Electronic Government Agency (Agesic) and the National Institute of Statistics (INE).

holds with an internet connection reached 88%, including 71% with a fixed broadband connection. Regarding the number of internet users, the data shows that nine out of ten Uruguayans use the internet daily.

Use increases among young people: 100% of young people between 14 and 19 years old are internet users and 98% in the range of 20 to 34 years old. For the rest of the ages, the percentages are: from 50 to 64 years old, 88% and from 65 years onwards, 49%. If the socioeconomic level is taken into account, users in the first quintile reach 74% and the percentage grows until reaching 95% in the fifth quintile. However, it is stated that the gap in internet access between households in the lowest and highest quintiles has been reducing by half since 2010.

Regarding the use of devices, 68% of households have at least one computer or tablet, but the most used for internet connection is the smartphone. Its daily use for this purpose reaches 90%, while computers reach 30% and smart TVs, 24%. Internet is mainly used for visiting social networks (100%), instant messaging (96%), calls and video calls (79%), information search (77%), downloading images and music, among others (71%). YouTube use reaches 47%, while Facebook, 46%, and WhatsApp, 92%. Regarding the internet usage for entertainment, 67% watched online TV and 33% listened to online radio. Netflix, with 51%, Vera TV, with 28%, cable channels, with 14%, and broadcast channels, with 13%, are among the media services providers seen on the internet.

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

**Table 1. Fictions broadcasted in 2019 (national and imported; premieres and reruns; co-productions)**

PREMIERE NATIONAL TITLES – 0	PREMIERE IMPORTED TITLES – 22
<p><b>CO-PRODUCTIONS – 5</b></p> <p><b>TNU – 1 title</b> 1. <i>Ernesto, Exterminador de Seres Monstruosos</i> (series – Brazil, Uruguay)</p> <p><b>Canal 4 – 2 titles</b> 2. <i>Atrapa a un Ladrón</i> (series – Argentina, Spain) 3. <i>María Magdalena</i> (telenovela – USA, Mexico)</p> <p><b>Teledoce – 2 titles</b> 4. <i>Supermax</i> (series – Argentina, Brasil) 5. <i>La Reina del Sur</i> (series – USA, Spain, Mexico)</p>	<p><b>Canal 4 – 3 titles</b> 1. <i>100 Días para Enamorarse</i> (telenovela – Argentina) 2. <i>Campanas en la Noche</i> (telenovela – Argentina) 3. <i>Pequeña Victoria</i> (telenovela – Argentina)</p> <p><b>Saeta – 2 titles</b> 4. <i>Sandro</i> (series – Argentina) 5. <i>El Rico y Lázaro</i> (telenovela – Brazil)</p> <p><b>Teledoce – 14 titles</b> 6. <i>Bajo Presión</i> (series – Brazil) 7. <i>Carceleros</i> (series – Brazil) 8. <i>El Otro Lado del Paraíso</i> (telenovela – Brazil) 9. <i>Final Feliz</i> (miniseries – Brazil) 10. <i>Justicia</i> (miniseries – Brazil) 11. <i>La Trampa</i> (telenovela – Brazil) 12. <i>Nuevo Sol</i> (telenovela – Brazil) 13. <i>Ojos sin Culpa</i> (miniseries – Brazil) 14. <i>Salve al Rey</i> (telenovela – Brazil) 15. <i>Sombras del Ayer</i> (telenovela – Brazil) 16. <i>Casa de Muñecos</i> (telenovela – Chile) 17. <i>Verdades Ocultas</i> (telenovela – Chile) 18. <i>Soltero con Hijas</i> (telenovela – Mexico) 19. <i>Betty en Nueva York</i> (telenovela– USA)</p> <p><b>TNU – 3 titles</b> 20. <i>Servir y Proteger</i> (series – Spain) 21. <i>Bajo Sospecha</i> (series – Spain) 22. <i>B&amp;B</i> (series – Spain)</p> <p><b>RERUNS – 9</b></p> <p><b>Canal 4 – 4 titles</b> 1. <i>ADDA: Amar Después de Amar</i> (telenovela – Argentina)</p>

	<p>2. <i>Casados con Hijos</i> (series – Argentina)  3. <i>Loco por Vos</i> (series – Argentina)  4. <i>Los Nuevos Simuladores</i> (series – Mexico)</p> <p><b>Teledoce – 1 title</b>  5. <i>Avenida Brasil</i> (telenovela – Brazil)</p> <p><b>TNU – 4 titles</b>  6. <i>Los Creadores</i> (educational series – Argentina)  7. <i>El Mundo de Luna</i> (educational series – Brazil)  8. <i>Billy the Krill</i> (educational series – Uruguay)  9. <i>Los Artistonautas</i> (educational series – Uruguay)</p> <p><b>TOTAL PREMIERE TITLES: 27</b>  <b>TOTAL RERUN TITLES: 9</b>  <b>TOTAL BROADCASTED TITLES: 36</b></p>
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Source: Obitel Uruguay

The Ibero-American fiction offer maintained the downward trend that appeared in recent years, both in terms of number of titles and of broadcast hours: in 2016, 40 titles were released, filling 2,465 screen hours; in 2017, 28 titles were released, filling 787 hours; in 2018 the 25 premieres covered 1,407 hours and 55 minutes; and in 2019, 27 titles were released, which summed up only 968 hours and 46 minutes (see Table 2). These data must be understood in the context of a general change in the programming decisions of the channels, that decided to fill their broadcast hours with fictions from another sources, mainly Turkey, and also importing or producing entertainment programs. These aspects will be analyzed in depth in section 5.

**Table 2. Premiere fiction in 2019: countries of origin**

Country	Titles	%	Chapters/ episodes	%	Hours	%
<b>NATIONAL (total)</b>	<b>0</b>	<b>0.00</b>	<b>0</b>	<b>0.0</b>	<b>0:00:00</b>	<b>0.0</b>
<b>OBITEL COUNTRIES (total)</b>	<b>22</b>	<b>81.48</b>	<b>1270</b>	<b>95.1</b>	<b>924:42:00</b>	<b>95.5</b>
Argentina	4	14.81	269	20.1	189:32:15	19.6
Brazil	11	40.74	490	36.7	366:51:45	37.9
Chile	2	7.41	192	14.4	134:40:30	13.9
Colombia	0	0.00	0	0.0	0:00:00	0.0
Spain	3	11.11	184	13.8	131:33:00	13.6
USA (Hispanic production)	1	3.70	118	8.8	90:10:30	9.3
Mexico	1	3.70	17	1.3	11:54:00	1.2
Peru	0	0.00	0	0.0	0:00:00	0.0
Portugal	0	0.00	0	0.0	0:00:00	0.0
Uruguay	0	0.00	0	0.0	0:00:00	0.0
Venezuela	0	0.00	0	0.0	0:00:00	0.0
<b>CO-PRODUCTIONS (total)</b>	<b>5</b>	<b>18.52</b>	<b>66</b>	<b>4.9</b>	<b>44:04:30</b>	<b>4.5</b>
Uruguayan co-productions	1	0.00	9	0.0	3:22:30	0.0
Co-productions between Obitel countries	4	0.00	57	0.0	40:42:00	0.0
<b>GENERAL TOTAL</b>	<b>27</b>	<b>100.0</b>	<b>1336</b>	<b>100.0</b>	<b>968:46:30</b>	<b>100.0</b>

Source: Obitel Uruguay based on Kantar Ibope Uruguay data

Regarding the origin of the premiere fictions, there is an increase in Brazilian titles (11) and a smaller number of Argentinian fictions. Historically, Argentina has been our main provider of television fiction, but in recent years there has been a decrease in its presence: in 2013 and 2014, 13 titles were released, and only four in the last two years; 2015 seems to be the hinge year in this change in supply, with the arrival and rapid expansion of Turkish fiction in Uruguay (Sánchez Vilela, 2016b).

The predominance of Brazilian fictions in 2019 could be also seen in the percentage of hours and in the number of chapters: 37.9% of the time was occupied by the premiere fiction and 36.7% of the chapters were from Brasil. However, it is necessary to highlight a

relevant change: traditionally, Brazilian fictions were telenovelas, but in this last year the diversity of formats was sharpened and only four of the 11 titles were telenovelas; the rest were series and mini-series.

As for national fiction, only one was registered, co-produced with Brazil and exhibited on the state channel, within a space called “El Canal de los Niños”. It is a children’s educational fiction: *Ernesto, el Exterminador de Seres Monstruosos y Otras Porquerías*<sup>10</sup>. Based on the homonymous book by the Uruguayan writer Roy Berocay, it had the support of public funds.<sup>11</sup> The nine-episode series is about Ernesto, a character with anti-hero traits who kills monsters and ghosts. In each chapter he solves a case with Bartolomeo, a boy who helps him in all the adventures.

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<sup>10</sup> It was produced by 3 Tabela Filmes (Brazil), Buen Cine and HTV-3 Tajam (Uruguay).

<sup>11</sup> The Icau Film and Audiovisual Promotion Fund in 2013, the Uruguay Audiovisual Program of the Ministry of Industry, Energy and Mining (Miem) and support from TNU and TV Ciudad.

Table 3. Formats of national and Ibero-American fiction

Format	National					Ibero-American					
	Titles	%	C/E	%	H	Titles	%	C/E	%	H	%
<b>Telenovela</b>	0	0.0	0	0.0	0:00:00	14	53.8	1065	82.5	779:27:00	0.8
<b>Series</b>	1	100.0	9	100.0	3:22:30	8	30.8	196	15.2	165:39:00	0.2
<b>Miniseries</b>	0	0.0	0	0.0	0:00:00	4	15.4	30	2.3	20:18:00	0.0
<b>Telefilm</b>	0	0.0	0	0.0	0:00:00	0	0.0	0	0.0	0:00:00	0.0
<b>Unitary</b>	0	0.0	0	0.0	0:00:00	0	0.0	0	0.0	0:00:00	0.0
<b>Docudrama</b>	0	0.0	0	0.0	0:00:00	0	0.0	0	0.0	0:00:00	0.0
<b>Others</b>	0	0.0	0	0.0	0:00:00	0	0.0	0	0.0	0:00:00	0.0
<b>Total</b>	<b>1</b>	<b>100.0</b>	<b>9</b>	<b>100.0</b>	<b>3:22:30</b>	<b>26</b>	<b>100.0</b>	<b>1291</b>	<b>100.0</b>	<b>965:24:00</b>	<b>1.0</b>

Source: Obitel Uruguay based on Kantar Ibope Uruguay data

**Table 4. The ten most watched titles on open TV**

	Title	Country of origin of the original idea or script	Channel	Format/genre	N. of chap./ep. (in 2019)	Time slot	Rating	Share
1	<i>El Otro Lado del Paraíso</i>	Brazil	Teledoce	Telenovela	120	Prime time	13.1	20.4
2	<i>Betty en Nueva York</i>	USA	Teledoce	Series	118	Prime time	10.9	16.5
3	<i>Ojos sin Culpa</i>	Brazil	Teledoce	Miniseries	14	Prime time	10.8	17.4
4	<i>El Rico y Lázaro</i>	Brazil	Saeta	Telenovela	32	Night	9.6	21.7
5	<i>Final Feliz</i>	Brazil	Teledoce	Miniseries	6	Prime time	9.4	15.3
6	<i>Carceleros</i>	Brazil	Teledoce	Miniseries	9	Prime time	8.9	14.5
7	<i>Pequeña Victoria</i>	Argentina	Canal 4	Telenovela	53	Prime time	8.8	14.2
8	<i>Nuevo Sol</i>	Brazil	Teledoce	Telenovela	75	Prime time	8.6	13.9
9	<i>Bajo Presión</i>	Brazil	Teledoce	Series	9	Prime time	8.5	14.4
10	<i>Verdades Ocultas</i>	Chile	Teledoce	Telenovela	151	Night	8.3	15.8
<b>Total productions: 10</b>				<b>Foreign scripts: 10</b>				
100%				100%				

Source: Obitel Uruguay based on Kantar Ibope Uruguay data

The predominance of Brazilian fiction is clear in the ten most viewed titles of 2019: seven are fictions of that origin, four of them are productions of few chapters, what may have favored their place in the ranking. This top ten has the peculiarity that the second place is occupied by a USA production, *Betty en Nueva York*, which had not been produced since at least 2008. In addition, there is only one Argentinian fiction, *Pequeña Victoria*, in seventh place. This scarce presence of Argentinian titles and its low position in the ranking confirms the trend that has been observed in recent years and it is consistent with the few premieres of that origin in 2019.

The most relevant aspect is the general decrease in the total rating compared to previous years. In 2018 the first five titles reached between 14 and 10 points while in 2019 most of the titles are below 10 points. In a diachronic view, the decline becomes more noticeable: in 2015 the title that occupied the first place had 20.2 rating points, with a share of 32.2%, and the lowest rating was 9.7 points with a share of 22.5%. Since then, values have been falling systematically and today are far from those recorded in the first five years of the past decade.

This decline could be explained in the context of a general drop in television audience, which we have already recorded at the beginning of this chapter. However, the behavior of the audience regarding Ibero-American fiction must be analyzed taking into account its relationship with the rest of the serial fiction offer. In this sense, it is observed that of the 22 fiction titles released in 2019, of non Ibero-American origin, ten were Turkish telenovelas. The one with the highest audience was *Mi Vida Eres Tú*, with 12.5 rating points and 22.5% of share, located in the range of the values registered in the table of the top ten, which shows a greater audience interest in fictions of this origin. The rest of the premiere and rerun fictions are mostly American series and get less than 7 rating points.

**Table 5. Audience profile of the ten most watched titles: gender, age, socioeconomic level**

	Titles	Channel	Gender %		Socioeconomic level %				
			Women	Men	A+A-	M+	M	M-	B+B-
1	<i>El Otro Lado del Paraíso</i>	Teledoce	63.5	36.5	8.2	15.8	19.3	20.8	35.8
2	<i>Betty en Nueva York</i>	Teledoce	65.0	35.0	10.6	13.7	15.9	17.1	42.7
3	<i>Ojos sin Culpa</i>	Teledoce	59.0	40.9	6.6	15.6	17.7	20.8	39.2
4	<i>El Rico y Lázaro</i>	Saeta	76.0	23.9	8.8	17.6	17.9	21.8	33.8
5	<i>Final Feliz</i>	Teledoce	54.6	45.4	8.1	15.2	19.3	13.6	43.7
6	<i>Carceleros</i>	Teledoce	59.5	40.5	7.9	24.6	18.4	19.9	29.0

7	<i>Pequeña Victoria</i>	Canal 4	61.3	38.7	16.5	20.6	34.1	11.8	16.9
8	<i>Nuevo Sol</i>	Teledoce	62.7	37.3	13.7	14.3	16.3	14.6	41.1
9	<i>Bajo Presión</i>	Teledoce	62.4	37.6	4.9	25.3	11.3	19.7	38.7
10	<i>Verdades Ocultas</i>	Teledoce	63.1	36.9	7.6	13.9	15.2	17.5	45.8
Titles		Channel	Age group %						
			4-11	12-17	18-24	25-34	35-49	50-59	60+
1	<i>El Otro Lado del Paraíso</i>	Teledoce	5.7	4.9	4.5	10.1	26.6	17.4	30.8
2	<i>Betty en Nueva York</i>	Teledoce	6.8	5.9	5.3	7.9	24.2	14.5	35.4
3	<i>Ojos sin Culpa</i>	Teledoce	6.6	4.5	3.4	18.8	29.4	11.7	25.7
4	<i>El Rico y Lázaro</i>	Saeta	8.2	1.8	2.4	2.3	17.1	22.9	45.4
5	<i>Final Feliz</i>	Teledoce	5.2	5.8	3.2	18.2	22.2	17.4	27.9
6	<i>Carceleros</i>	Teledoce	6.9	2.6	4.1	10.2	26.1	15.0	35.1
7	<i>Pequeña Victoria</i>	Canal 4	2.9	2.5	5.6	13.3	23.4	17.2	35.2
8	<i>Nuevo Sol</i>	Teledoce	7.0	7.1	5.9	11.8	20.9	17.3	30.2
9	<i>Bajo Presión</i>	Teledoce	6.2	3.6	3.0	17.3	18.8	16.5	34.5
10	<i>Verdades Ocultas</i>	Teledoce	6.4	5.5	3.4	10.0	25.3	13.1	36.3

Source: Kantar Ibope Uruguay

The audience of the ten most watched fictions is mainly female, who, in most titles, exceeds 60%. The male percentage is half of that value. Only in three titles the percentages of women and men approach, but always with a predominance of the female audience. The themes of this series and two Brazilian miniseries could explain a greater presence of male audiences.

Regarding the socioeconomic level, the audience was concentrated at the lowest levels, fundamentally in the M- strata and especially the B+B- level, which reaches between 45% and 39% of the audience in any of these titles. It is interesting to note that this trend changes specifically in relation to *Pequeña Victoria*. In this case, the percentages of the M- and B+B- strata are the lowest, 11.83% and

16.97% respectively. On the other hand, level M constituted 34.08% of its audience, which did not occur in any other case. Furthermore, the M+ stratum constituted 20%. For this title, thus, the audience belonged primarily to middle class.

Considering the audience by age, the same trend as in previous years is confirmed: it is an audience constituted mainly by people over 60 years old, with low percentages of young population, particularly in the age range between 18 and 24 years old.

### 3. VoD monitoring

#### 3.1. VoD in Uruguay

**Chart 2. VoD in Uruguay**

	<b>Platforms</b>	<b>Total</b>
<b>VoD linked to open TV networks</b>	UN3TV (YouTube), teledoce.com, canal4.com.uy, canal10.com.uy	4
<b>VoD linked to pay TV networks</b>	Flow, NSNOW, TCC Vivo, DirecTV Play, HBO Go	5
<b>VoD linked to telecommunication companies</b>	Claro Video, Movistar Play, VeraTV	3
<b>VoD without links to TV networks</b>	Netflix, Amazon Prime	2
<b>GENERAL TOTAL</b>		<b>14</b>

Source: Obitel Uruguay

VoD continues to gain ground in the television industry, according to several signals seen in 2019. On the one hand, this is observed in the behavior of the audience, with the sustained growth of subscriptions to platforms. On the other hand, it is seen in the advertising strategies of companies such as Claro and Movistar, which seek to position themselves in the market through their VoD services. Both companies in the telecommunication sector promoted their respective platforms, Claro Video and Movistar Play, during prime time of open TV, announcing the arrival of Netflix to their content grid as their main feature. This is also a sign of media convergence, as an intrinsic characteristic of the television offer through the internet, as well as Netflix's dominant position as a platform.

Regarding the web portals of traditional channels and pay television, no visible responses have yet been identified aimed at competing in this sector. The three private open TV channels just promote on their Facebook pages the possibility of watching, through their portals, the chapters aired the day before. This is how they create a video repository for each title, and all chapters only remain available until a few months after the title ended its broadcast. The strategy is to privilege the airing of the premiere.

### 3.2. VoD analysis in 2019: national and Ibero-American premiere fiction

**Table 6. National and Ibero-American fiction broadcasted on VoD in 2019**

Premiere national titles	Premiere Ibero-American titles	Co-productions
	<p><b>Amazon Prime – 5</b></p> <ol style="list-style-type: none"> <li>1. <i>Promesas de Arena</i> (series – Spain)</li> <li>2. <i>La que se Avecina</i> (series – Mexico)</li> <li>3. <i>De Viaje con los Derbez</i> (series – Mexico)</li> <li>4. <i>Hospital Valle Norte</i> (series – Spain)</li> <li>5. <i>Allí Abajo</i> (series – Spain)</li> </ol> <p><b>Claro Video – 3</b></p> <ol style="list-style-type: none"> <li>1. <i>La Guzmán, la Reina del Rock</i> (series – Mexico)</li> <li>2. <i>Bronco, la Serie</i> (series – Mexico)</li> <li>3. <i>Claramente</i> (series – Mexico)</li> </ol> <p><b>DirecTV Play – 1</b></p> <ol style="list-style-type: none"> <li>1. <i>Secretos de Estado</i> (series – Spain)</li> </ol> <p><b>Cablevisión Flow – 9</b></p> <ol style="list-style-type: none"> <li>1. <i>Historias Migrantes</i> (miniseries – Argentina)</li> <li>2. <i>Nació Ayer</i> (miniseries – Argentina)</li> <li>3. <i>No Sé Cómo Volver</i> (miniseries – Argentina)</li> <li>4. <i>Inconvivencia</i> (miniseries – Argentina)</li> <li>5. <i>El Mundo de Mateo</i> (miniseries – Argentina)</li> <li>6. <i>Otros Pecados</i> (miniseries – Argentina)</li> <li>7. <i>Chueco en Línea</i> (others – Argentina)</li> </ol>	<p><b>Amazon Prime – 1</b></p> <ol style="list-style-type: none"> <li>1. <i>Hernán</i> (series – Spain, Mexico)</li> </ol> <p><b>Flow – 1</b></p> <ol style="list-style-type: none"> <li>1. <i>Atrapa a un Ladrón</i> (series – Argentina, Spain)</li> </ol> <p><b>Movistar Play – 1</b></p> <ol style="list-style-type: none"> <li>1. <i>Hierro</i> (series – Argentina, Spain)</li> </ol> <p><b>UN3TV (YouTube) – 1</b></p> <ol style="list-style-type: none"> <li>1. <i>Hotel Romanov</i> (others – Argentina, Uruguay)</li> </ol>

8. *El Tigre Verón* (series – Argentina)

9. *Influencers* (others – Argentina)

### **HBO Go – 5**

1. *Santos Dumont* (miniseries – Brazil)

2. *La Vida Secreta de las Parejas* (series – Brazil)

3. *Pico de Neblina* (series – Brazil)

4. *El Jardín de Bronce* (series – Argentina)

5. *Psi* (series – Brazil)

### **Movistar Play – 7**

1. *Merli Sapere Aude* (series – Spain)

2. *El Embarcadero* (series – Spain)

3. *El Día de mi Suerte* (series – Peru)

4. *Vida Perfecta* (series – Spain)

5. *Justo Antes de Cristo* (series – Spain)

6. *Velvet* (series – Spain)

7. *La Peste* (series – Spain)

### **Netflix – 22**

1. *Alta Mar* (series – Spain)

2. *Bolívar* (series – Colombia)

3. *Elite 2* (series – Spain)

4. *El Marginal 3* (series – Argentina)

5. *Vis a Vis 4* (series – Spain)

6. *Criminal: España* (miniseries – Spain)

7. *Las Chicas del Cable 5* (series – Spain)

8. *Las del Hockey* (series – Spain)

9. *Sintonía* (series – Brazil)

10. *Apache: la Vida de Carlos Tévez* (miniseries – Argentina)

11. *45 Revoluciones* (series – Spain)

12. *Siempre Bruja* (series – Colombia)

13. *Vivir sin Permiso* (series – Spain)

14. *Coisa Mais Linda* (series – Brazil)

15. *Tijuana* (series – Mexico)

16. *Samantha! 3* (series – Brazil)

17. *La Casa de Papel 3* (series – Spain)

18. *Historia de un Crimen: Colmenares* (series – Colombia)

19. *3% 3* (series – Brazil)

20. *Go! Vive a tu Manera* (telenovela – Argentina)

21. *Hache* (series – Spain)

22. *Monzón* (series – Argentina)

### **NSNOW – 3**

1. *Tu Parte del Trato* (miniseries – Argentina)

2. *Berko: el Arte de Callar* (miniseries – Chile)

	3. <i>Tiempos de Guerra</i> (series – Spain)	
	<b>TCC Vivo – 2</b> 1. <i>Llámame Bruna</i> (series – Brazil) 2. <i>Ó Doutrinador</i> (series – Brazil)	
	<b>UN3TV (YouTube) – 3</b> 1. <i>Barrilete Cósmico</i> (others – Argentina) 2. <i>Haciendo Escenas</i> (others – Argentina) 3. <i>Lxs Mentiroxs</i> (others – Argentina)	
<b>Total: 0</b>	<b>Total: 60</b>	<b>Total: 4</b>
<b>GENERAL TOTAL:64</b>		

Source: Obitel Uruguay

As in 2018, Netflix is the platform with the largest number of Ibero-American titles and the one with the greatest diversity of origins. However, it is possible to note that the other platforms have been increasing their premiere offer. The clearest case is that of Amazon Prime, which went from having one title in 2018 to five in 2019. Another particular case is that of Flow (Cablevisión), which began to produce exclusive series and miniseries for its platform and also established an agreement with Untref, Argentinian producer of the Tres de Febrero University, which for some years has been producing webseries for its YouTube channel. Flow included some of those titles in its library, both already released and premiered in 2019.

**Table 7. VoD premiere fiction in 2019: countries of origin**

Country	Titles	%
<b>NATIONAL (total)</b>	<b>0</b>	<b>0</b>
<b>OBITEL COUNTRIES (total)</b>	<b>60</b>	<b>94</b>
Argentina	18	<b>28</b>
Brazil	10	<b>16</b>
Chile	1	<b>2</b>
Colombia	3	<b>5</b>
Spain	22	<b>34</b>
USA (Hispanic production)	0	<b>0</b>
Mexico	5	<b>8</b>
Peru	1	<b>2</b>

Portugal	0	0
<b>Uruguay</b>	<b>0</b>	<b>0</b>
Venezuela	0	0
<b>CO-PRODUCTIONS (total)</b>	<b>4</b>	<b>6</b>
Uruguayan co-productions	1	2
Co-productions between Obitel countries	4	6
<b>GENERAL TOTAL</b>	<b>64</b>	<b>100</b>

Source: Obitel Uruguay

Regarding fiction that premiered on VoD systems in 2019, productions from Spain (34%) and Argentina (28%) predominate and those from Brazil and Mexico are in the third and fourth place respectively. The format is mainly series (73%). Unlike open television, the telenovela occupies a small percentage of the offer.

**Table 8. Formats of national and Ibero-American fiction on VoD**

Format	National				Ibero-American			
	Titles	%	C/E	%	Titles	%	C/E	%
<b>Telenovela</b>	0	0	0	0	1	2	15	2
<b>Series</b>	0	0	0	0	46	73	531	80
<b>Miniseries</b>	0	0	0	0	11	17	77	12
<b>Unitary</b>	0	0	0	0	0	0	0	0
<b>Others</b>	1	100	8	100	5	8	43	6
<b>Total</b>	<b>1</b>	<b>100</b>	<b>8</b>	<b>100</b>	<b>63</b>	<b>100</b>	<b>666</b>	<b>100</b>

Source: Obitel Uruguay

Regarding national fiction, while in 2018 four titles were offered (two of them on UN3TV), in 2019 there was only *Hotel Romanov*, a webseries co-produced with Argentina and also premiered on UN3TV. The lack of premiere fiction on open television also had an impact on the fact that there are no Uruguayan titles on VoD platforms such as VeraTV. However, regarding national film production, it stands out that Netflix offered several national cinema titles and that Movistar Play included two Uruguayan fictions, *Todos De-*

*trás de Momo* (2018) and *El Mundo de los Videos* (2017). Both titles had already been released on open television and streaming.

#### 4. Fiction analysis: open TV, VoD and transmedia expressions in networks

For this section, the observation was focused on the transmedia strategies used by Canal 4 for its premiere telenovela *Pequeña Victoria*. The decision to take this case responds to the fact that it proposes topics of current relevance on the local public agenda. The story features a single woman who uses belly surrogacy and who will be emotionally involved with the surrogate mother and with the sperm donor, a transgender woman. The three are going to be the mothers of baby Victoria, establishing an unconventional family. A fourth woman is added to these three characters, who is the one that helps the pregnant mother to reach the hospital when labor begins. Thus, a fourth type of emotional bond is proposed.

The official Facebook page of Canal 4 was studied, which was the space where the highest activity was recorded, both by the issuer and by the audience. In general terms, the main strategy identified consisted of concentrating on this platform different contents that referred to the telenovela, both for its promotion before the release and to invite the audience to make comments on the chapters already broadcasted and to watch them again on demand on the channel's web portal.

The promotion strategies adopted three forms. The first one was to share articles of news websites<sup>12</sup> that announced the premiere and presented the plot line, focusing on the surrogacy, the new family models and the lead-



<sup>12</sup> <https://www.tvshow.com.uy/tv/pequena-victoria-telenovela-argentina-estreno-canal.html>

ing character of the transgender mother. Today's social relevance of these aspects is mentioned and reference is also made to the controversies that could be generated in Uruguay, as it happened in Argentina, where it was released a few days in advance. This shows a certain intention of the channel to take advantage of the potential of the topic to create conversation on the social networks.

The second form consisted of sharing fragments of various channel programs that included the premiere of the telenovela in its content. One of them was the central news *Telenoche*<sup>13</sup>, which introduced the day after the premiere a summary with some scenes of the telenovela with the title:

“A rating success in the whole country”. The images showed the meeting between the biological mother, the pregnant mother and the donor mother. From then on, the headline changed to: “The debate on belly surrogacy is installed”. The news presenter announced the broadcast of the next chapter and reported that in Uruguay it is “legal surrogacy only if the womb belongs to the sister or sister-in-law”.

These fragments of other programs that are shared as content for the networks are condensed and accessible on the channel's main Facebook page, and it is here that it is observed an exploitation of the possibilities that enables the virtual convergence space. There is a certain circularity in this aspect since the channel's activity is basically to share on its Facebook page these contents created by its own programs for open television. It could be affirmed that more than a transmedia activity, it is the application of aspects that refer to cross-



<sup>13</sup> <https://www.facebook.com/canal4uy/>

media models (Jenkins, 2006). Central aspects of the telenovela's story go from adapting to the news format in the central newscast to establishing itself as a topic of current debate and entertainment in the afternoon and morning programs; it is not an expansion of the narrative universe, but rather a condensed story in different formats for different broadcast spaces. It is also important to mention that, with the exception of a video filmed with a smartphone by actor Facundo Arana that invites to watch the telenovela on the channel, the video content shared on Facebook was not exclusively produced for the social networks.

The third form is limited to sharing the promotions of the chapters, as they appear in the broadcast programming, encouraging the audience to comment on the main events that happened and inviting them to watch the chapter again in VoD on the channel's website. The use of the hashtag #PequeñaVictoria in these publications intends to generate discussion about the telenovela on the networks, however the result is very meager.

Audience activity focused on answering to these posts. Among the responses, the majority of comments were against the broadcast of the telenovela with various expressions of repudiation, but no versions were identified that discussed and established an exchange of opinions or positions. Although there is a strong presence in social media of militant groups in favor of the new transgender rights agenda and the promotion of non-traditional family models, no demonstrations were seen from these groups that showed an identification with the characters or expressed opinions about the treatment of the topics. The broadcast of *Pequeña Victoria*, instead, has risen expression of people and groups that hold contrary opinions to these conceptions. In this sense, an initiative promoted on Change.org platform to gather signatures to stop the telenovela broadcast stands out. The petition reached 3,171 signatures, but it failed to conquer a relevant space on social networks.

## 5. Highlights of the year

The year 2019 was marked by two circumstances that have relevant consequences on television: it was a year occupied by the electoral contest (internal elections in June and national elections in October and November) and by the Copa América. These events shaped the programming and advertising, as well as the audience rates. Of the ten most watched programs of all genres and origins<sup>14</sup>, six are linked to the elections. In the annual rating average, the most watched program was *Uruguay Decide: el Debate*, with 20 points, and the second was *Copa América 2019*, with 19 points. If the electoral topic is excluded, the program with the highest annual average was the reality contest *Master Chef*, with 17 rating points and 25 of share; the second was *Pasapalabra*<sup>15</sup>, with a rating of 14.9; and in third place was *Subrayado*, with an annual rating of 14.7 – all of them aired on Saeta. Only one television fiction title occupies a place in this top ten: a Turkish telenovela, *Madre: Todo por mi Hija*.

These data reveal the panorama of open television in Uruguay, the programming strategies and where the national production actions are concentrated. That is to say, a panorama in which Ibero-American fiction is in decline and where national programs consist of information or contests. On the contrary, fictional content multiplies on VoD platforms, with a strong presence of Ibero-American titles on Netflix.

The highlight of the year is, then, the consolidation of a trend in programming and production decisions by private channels. Although it was being outlined in previous years, it finally crystallized in 2019.

Regarding programming, two relevant aspects are observed. The first refers to the almost disappearance of Argentinian fiction on Uruguayan screens. This is explained by the dissolution of the link

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<sup>14</sup> Data from Kantar Ibope Uruguay.

<sup>15</sup> It is a game show between two teams, each made up of celebrities and a contestant from the audience. The competition is based on getting points through different slogans that have to do with words, letters and vocabulary.

between Teledoce and El Trece, from Argentina, whereby the main programs of this channel were also broadcast by Teledoce. This situation implied the disappearance of Pol-ka's fictions, which, since its creation, in 1994, had been part of the available offer on Uruguayan screens (Sánchez Vilela, 2016a, p. 110-12). For example: in 2017 Teledoce offered five Argentinian premiere titles and in 2019 none. But this sharp decline in Argentinian fictions is also due to the purchase decisions of the other channels: Saeta practically stopped including Argentinian fictions in its grid (in 2016, 2017 and 2018 it did not air any titles and in 2019 only a miniseries, *Sandro*); Canal 4, which traditionally reproduced the fictions of the Argentinian channel Telefe, slightly reduced that presence, not so much in the number of titles, but in the amount of hours devoted to this origin.

The second relevant aspect regarding programming decisions is that all private channels decided to dedicate prime time, specifically the time slot immediately after the newscast, to entertainment programs, whether domestic or imported ones. These programs are contests of different types, but in any case the channels chose to compete with the same type of product. The fictions, which traditionally occupied the central time slot, move towards the night.

With respect to the production of national programs, the three private broadcast television channels have a similar behavior: between 67% and 62% of national programming are produced by themselves and around 37% are created by independent production companies. In general terms, the contents produced by the channels are dedicated to information, in addition to those entertainment formats that require large resources and are purchased from large content production companies.<sup>16</sup> In sum, considering the three private channels as a whole, 63.31% of own production is dedicated to information, especially with long television newscasts, 16% to entertainment and 19% to infotainment.

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<sup>16</sup> This is the case of Saeta with *Escape Perfecto* (Sony) and Teledoce with *Trato Hecho* (Endemol).

The independent production companies are in charge of producing entertainment or infotainment in a smaller format, as it is the case of *Pasapalabra*; 47% of independent production is dedicated to entertainment. Among the producers that generate more hours of content are: DiezCatorce, Iso Films and Sinapsis Ideas for Canal 4; Kubrick Media for Teledoce; and Origami, La Guitarrita, Zur, Oz Media, Vitamina and Tres Monos are among the most important linked to Saeta, which is the channel that has the largest variety of ties with independent production companies.

The LSCA stipulates that at least 60% of the programming of each channel must be national production (article 60, subsection A). This provision seems to be fulfilled (see next table) as well as the percentages in charge of independent production companies, but the indication of including two hours a week of national premiere fiction (subsection C) has not been met. This subsection has been declared unconstitutional, but not yet repealed.

National production per channel				
Channel	National	%	Foreign	Total
Saeta	4722:57:00	77.3%	1386:58:30	6109:55:30
Teledoce	3646:33:45	66.7%	1822:50:15	5469:24:00
Canal 4	3550:07:30	65.8%	1846:58:30	5397:06:00

These data are relevant to explain the absence of domestic fiction on national television and are added to the situation faced by public television. In recent years, national fiction has been reduced to titles financed by public funds and exhibited by state broadcasters. Although scarce, it was present in the public media. In 2019 there is only one co-production with Brazil, which occupied just over three hours of screen time throughout the year. The SeriesUy funds program, created in 2016, approved three titles, but only one was released in 2018.<sup>17</sup>

<sup>17</sup> The only production was *Todos Detrás de Momo. Gris* (2018 call) has not started filming and the same happens with *Metro de Montevideo* (2019 call).

## 6. Theme of the year: melodrama in times of streaming

### 6.1 Melodrama in prison terms: *El Marginal* and its temporary breaks

Uruguayan audiences have historically been consumers of imported fictions of very diverse origin, which was exacerbated first with pay television and today with streaming and video on demand. The most classic versions of melodrama coexist in the offer of television fiction available to these audiences – fundamentally in Turkish and Chilean telenovelas aired on open television, also available on streaming – with more sophisticated and complex expressions present on platforms such as Netflix, but none national production. For these reasons, to study the theme of the year, we chose to explore one of the inflections of contemporary melodrama: the prison fiction. We will take the case of *El Marginal*<sup>18</sup>, produced by Underground and written by the Uruguayan Adrián Caetano, who had already dealt with the prison theme in *Tumberos* (2002, Ideas del Sur).

In a diachronic perspective of the subject, a key turning point was *OZ* (1997-2003), the series that, with its aesthetic and narrative innovation, was emblematic of the slogan “It’s not TV. It’s HBO”. From the universe of *OZ*’s male characters, it will go to the women’s prison in the Mexican *Capadocia* (2008, HBO) and later to the spectrum of identities offered by *Orange is New Black* (2013-2019, Netflix). In all of them, elements of the melodramatic matrix and its aesthetics could be recognized (Sánchez Vilela, 2020, p. 8-10).

In the last year, Uruguayan audiences could access video on demand – in addition to the seventh season of *Orange is the New Black* – to watch a variety of prison fictions of Ibero-American origin: the Argentinian *El Marginal* (and its Mexican version *El Recluso*), the

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<sup>18</sup> Released on Argentinian public television in 2016. It has three seasons: the first one has 13 episodes and the second and third seasons have eight each. Underground was sold to Telemundo in 2019, and it is in this new situation that the completion of a fourth season is announced.

Spanish *Vis a Vis*, the Brazilian *Hermandad* and, of the same origin on broadcast television, *Carceleros*. All these fictions represent the prison world, but in doing so they tell us about the issues and problems of the societies, as melodrama has always done. We will then deal with prison fiction to demonstrate the presence of melodrama, even in a narrative that might seem foreign to it.

## 6.2. Inflections of the melodramatic matrix

In the first season of *El Marginal*, some of the components of the melodramatic matrix are strongly present. One of them refers to the configuration of the characters. Thus, the character Miguel Palacios is a policeman who enters San Onofre Prison with a false identity: Pastor. His mission is to find a young woman (Luna Lunati), the daughter of a corrupt judge, who was kidnapped by the Borges brothers, two prisoners who hold power in prison. Palacios/Pastor is both victim and hero. The kidnapped young woman, locked in a sordid place in the prison, is a character who embodies the classic role of the innocent victim who must be rescued. The affective relationship with one of the kidnappers also composes the tone of the melodrama.

One of the central aspects of melodrama is the recognition of the virtues and vices embodied in the characters, but the sense of justice and the values that move their relationships change, depending on the subgenres and cultural contexts in which it is registered. If in the classical melodrama there is a restoration of order – the triumph of virtue and the punishment of evil –, the romantic and realistic melodrama of the 19th century breaks with that pattern. The narrative of *El Marginal* is found in this second group. Here, the confrontation of good and evil is present, with recognizable borders, but also diluted, both in the configuration of the characters and in the situations. Palacios is not the hero full of virtues. In fact, at the end of the first season, he murders the youngest of the Borges brothers, Diosito. Even so, he moves in the sphere of good, as he faces the criminality of the Borges brothers and rescues the kidnapped young

woman. At the same time, net of corruption that links the Borges with the prison director, the police and the judiciary is exposed.

The expansion of the narrative world in the second and third seasons introduces inflections in the melodramatic matrix so that the boundaries between good and evil become more complex. Thus, expressions of cruelty and violence are embodied in characters with different degrees of evil. The axis of the second season is the fight of the Borges against El Sapo. El Sapo, with a physical aspect and a cohort that causes terror, reissues the traditional agreement in melodrama between the physical and moral aspects, and represents the purest evil, the supreme wicked. The Borges brothers are his antagonists and release the San Onofre prison from his domain. At the same time, the character of Patricio, the doctor who lays the blame on him of a crime that he did not commit to save his lover, represents a certain counterpoint with the world of evil embodied in El Sapo and the Borges. The place of the victims, which are depositories of an action of damage, is occupied successively by different characters in different situations and scales.

The dominant aesthetic is that of excess: various types of violence, hard images, sordid environments and situations, and the grotesque are systematically exacerbated. The riots, especially “the pigeons mutiny”, constitute the high point of the excess at the same time that they correspond to repetition cycles. The aesthetics of repetition in *El Marginal* is revealed in the circuit of spaces in which images account for the topographic and power organization<sup>19</sup>, but especially in the superposition of violent overflow situations that tend to create intense emotions. The polarized world of melodrama is reissued and the topographical distribution of the prison expresses it; virtue and evil continue to be recognizable (gestures, feelings, ac-

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<sup>19</sup> The prison world of *El Marginal* has a topography that represents different levels of privilege: the patio, whose inhabitants are called *villeros*, corresponds to the lowest level; the pavilions, where the prisoners who have the power in the prison are; prison authorities in the offices of the highest floors.

tions), but the place of the victim and the wicked are not fixed and the characters can be both, so that the very idea of restorative justice of an order -classic in melodrama – appears disturbingly altered. As an example, the defeat of Sapó and his men, after a hard exposition of his criminal cruelty, which clearly configures him as evil, works as a relief, as punishment and liberation. But on the other side of the conflict are the Borges: the liberating action establishes order, but with the dominance of another group.

### **6.3. *El Marginal*: seriality and time**

The seriality of television fiction involves narrative fragmentation into chapters and seasons. Besides, it implies a particular relationship with time and suspense as “it offers the simultaneous tension between compression and the temporal expansion of the experience of the text” (Williams, 2018, p. 170). In this analysis of *El Marginal*, we will focus exclusively on the dimension of seriality between the seasons because it is there that the most intense time gaps occur.

The seasons of this fiction propose a seriality in which the time of the story is fragmented, altering the chronological order. It is about a manipulated<sup>20</sup> time in which the narrative organization resorts to flashback and the suspense occurs both in the past and in the future.

The first season sets out a linear development of the story. It begins with Palacios entering the prison and ends with the burning of the patio, as a result of the Borges attack. The second season deals with events that occurred three years earlier: it is a great flashback, a climax of violence, which is called “pigeons mutiny” in the last two chapters. In the third season, a temporary alteration occurs again: the story takes place two years after the “pigeons mutiny” and one

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<sup>20</sup> Manipulated time refers to the handling of the stories of the characters; in other words, it refers to the way in which their past and future are revealed in the evolution of the narrative so that secrecy and moments of revelation are managed.

year before the events narrated in the first season. Flashback is also used: it begins with the scene of Luna Lunati's kidnapping (first season), carried out by Diosito, and an overprint that shows "one year before".<sup>21</sup>

This temporal manipulation is combined in *El Marginal* with the use of *racconto*. They are small fragments integrated into the first chapter and the last of the second and third seasons, which function as a summarized time that enables the development of the following chapters. At the same time, each *racconto* at the end of the season introduces a modification, a new situation that works as a cliffhanger towards the following season. For example, the images of the death of Diosito at Palacios's hands, which occurred at the end of the first season, is repeated at the beginning of the second season and at the end of its last chapter, but in the last images an action that we had not seen is introduced: Patricio enters the ambulance where Diosito is and revives him with an injection. The face of Diosito alive occupies the entire screen and is a strong cause of expectation for the next chapter.

A complex use of temporal jumps and the fragmentation of the story become evident. It seems quite reasonable to think that the success of the first season determined the definition of a later narrative plan that was not foreseen. In any case, this did not necessarily lead to the choice of the temporal jumps that we have pointed out. This risky handling of seriality is favored by the logic of streaming and video on demand. The viewer can go back to order the story because all the chapters are available. Somehow it reissues the practice of reading the printed novel: rereading to detect any clues that we had forgotten or that we had not paid attention to and that we now need to follow the story. This is a condition of video on demand that can affect the current characteristics of seriality and its time man-

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<sup>21</sup> A fourth season is announced for 2020. The story would be in chronological order with the first season: after Luna's release, the Borges are transferred to another prison and there they meet Palacios again.

agement. On the other hand, the intensity of the cliffhanger at the end of each season promotes compulsive or marathon consumption.

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**Introduction**

During 2019, various situations once again showed the deep crisis in the country. Audiovisual production continued, albeit with figures that account for a declining industry. Four productions were released: a first was made by the state channel (TVE), a second by a local independent producer (Oduver Cubillán and BGcreativos), the third was produced by the private channel (RCTV) and broadcast by the subscription channel IVC Networks, and the fourth was also produced by RCTV. While the first two productions did not exceed the 35-episode figure, the third and fourth had 73 episodes.

On March 7, there was the biggest blackout in the country's history. For more than a week, 95% of the territory was paralyzed by a lack of electricity. The action was classified by the government as an electric sabotage. The darkness that covered the country also subsumed serial fiction.

**1. Venezuela's audiovisual context in 2019**

The television structure remains similar to previous years, in which there is progressively an increase in public media. Open tele-

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<sup>1</sup> We thank Nielsen Venezuela for its collaboration, especially Abraham García (CS Account Executive), for their contributions and support for this research.

vision remains an alternative for those who do not access paid content services (cable and satellite) as well as online platforms. The television channels with the highest national coverage are private: Televen and Venevisión, followed by the public channel, Venezolana de Televisión.

### 1.1. Open television in Venezuela

Not only channels that transmit via radio waves with national range are shown, but also channels that transmit under DTT/TDA and are part of the open signal.

**Chart 1. National broadcasters/channels in Venezuela**

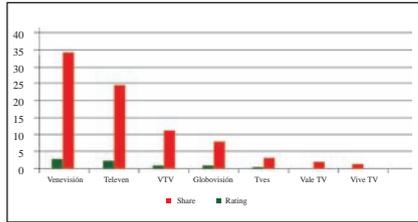
Private broadcasters/channels (9)	Public broadcasters/channels (13)
<p>Canal I                      Globovisión                      La Tele Tuya (TLT)                      Meridiano Televisión                      Televen                      TV Familia                      Vale TV                      Venevisión                      Vepaco TV</p>	<p>123 TV                      Alba TV                      ANTV – Fundación Audiovisual Nacional de Televisión                      Ávila TV                      ConCiencia TV                      Corazón Llanero                      Colombeia – La Televisora Educativa de Venezuela                      PDVSA TV                      Tele Sur – La Nueva Televisión del Sur C.A.                      TVes – Fundación Televisora Venezolana Social                      TV Fanb                      Vive TV – Visión Venezuela                      VTV – Compañía Anónima Venezolana de Televisión</p>
<b>TOTAL BROADCASTERS = 0</b>	<b>TOTAL CHANNELS = 22</b>

Source: Obitel Venezuela

The DDT/TDA offer also includes three private channels – Venevisión, Meridiano Television and TLT – and two public international channels – CGTN (China Global Television Network) and RT (Russia Today). Other domestic private channels have not been added to the offer because they do not have the approval of the National Telecommunications Commission (Conatel).

**Graph 1. Rating and TV share by station (rating by home )**

Station	Rating (%)	Share (%)
Venevisión	1.01%	10.25%
Televen	0.73%	7.35%
VTV	0.33%	3.35%
Globovisión	0.25%	2.57%
TVes	0.09%	0.94%
Vale TV	0.05%	0.46%
Vive TV	0.04%	0.38%

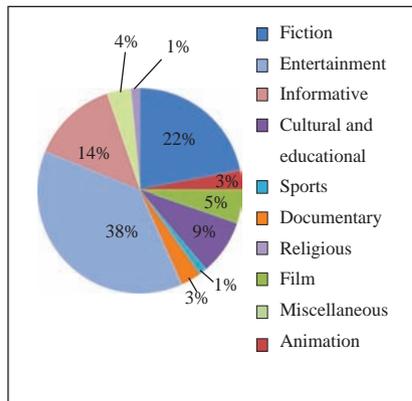


Source: Obitel Venezuela

The constancy detected in previous years is maintained: the channels through which the greatest amount of serial fiction is transmitted are the ones that reach the highest rating.

**Graph 2. Genres and hours broadcasted on TV programming<sup>2</sup>**

Genre	%
Fiction	22.1
Animation	2.73
Film	5.41
Cultural and educational	8.54
Sports	1.34
Documentary	2.91
Entertainment	38.28
Informative	13.58
Miscellaneous	3.68
Religious	1.43
<b>TOTAL</b>	<b>100.00</b>



Source: Obitel Venezuela

<sup>2</sup> The programming data was obtained from the selective collection of two weeks of programming of four channels: Venevisión, Televen, La Tele Tuya and TVes.

## 1.2. Pay TV

Pay TV had a penetration of 56.47% for the second quarter of 2019 (the last date on which the government's National Telecommunications Commission published the indicators of the sector), with a reduction of 3.29% compared to the end of 2018. On February 18, 2019, the National Superintendence for the Defense of Socio-economic Rights (Sundde), a body attached to the Ministry of the People's Power of National Trade, issued a "preventive price adjustment measure" for the alleged crime of "speculation" by subscription television operators.<sup>3</sup> Price freezing had an economic impact on the service providers, which had difficulties in importing and replenishing equipment, and it may have affected the reduction in the number of users. Pay TV was affected by censorship measures and pressure to remove TV channels that broadcasted critical content about the government management from their programming grids. Deutsche Welle in Spanish, from Germany's public television network, was taken out of air in August 2018 and returned without explanation in April 2019, after broadcasting the documentary *Venezuela, la Huida de un Estado Fallido*.<sup>4</sup>

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

According to data from the Central Bank of Venezuela (BCV), as early as the third quarter of 2018, consumption contracted by 22.5% and commercial activity declined by 40%.<sup>5</sup> Against this backdrop, national companies used new ways to position their brand in the market through social media. It is important to mention that 57% of Venezuelans prefer to receive information on networks, compared to 48% who prefer to receive it through TV (Tendencias

<sup>3</sup> <http://sundde.gob.ve/index.php/blog-wrapper/rss/84-onepage-blog/1386-ajustan-precios-a-caberas-a-nivel-nacional-por-especulacion>

<sup>4</sup> <http://www.producto.com.ve/pro/palestra/restituyen-sorpresivamente-emisiones-dw-cableoperadoras-venezolanas>

<sup>5</sup> <https://www.infobae.com/america/venezuela/2019/11/06/los-emprendedores-que-re-sisten-en-la-peor-crisis-economica-que-sacude-a-venezuela/>

Digitales, 2020, p. 7). Under this scheme, they use influencers and Instagramers' marketing strategies, gamification, video marketing on YouTube, Instagram and Tik Tok, as well as the "viralization" of memes and storytelling based on experiences.

For this chapter, it was impossible to obtain information about advertising investment on TV, but some data regarding online advertising investment. In mid-2019, the website Admetricks recorded some campaigns with the highest investment in the country: finance (US\$ 219,504); restaurants (US\$ 79,115); film exhibition companies (US\$ 51,305); and alcoholic drinks (US\$ 46,430). These were campaigns designed for desktop and mobile, some of them through Instagram.

#### 1.4. Merchandising and social merchandising

The prohibition established in the Social Responsibility in Radio, Television and Electronic Media Law (2010) about direct marketing and marketing into audiovisual content that is not live continues.<sup>6</sup> Venevisión maintained the campaign "Somos lo que Queremos" (We Are What We Want to Be); and in the news it maintained "El Buen Venezolano" and "El Buen Venezolano en Acción", focused on citizen values, and "Al Natural es Mejor", which emphasizes the risks of elective cosmetic surgeries. The campaigns were broadcast on television, on the channel's website and on its YouTube platform. Televen maintained the programs *Se Ha Dicho* and *Gente que Motiva*, also disseminated by its website and YouTube channel, which present inspiring stories aimed at promoting motivation to achievement. Social merchandising was explicitly addressed through *Eneamiga's* content, which criticizes the practices generated from the use of social networks, fictional celebrities, use of fake identities and cyberbullying.

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<sup>6</sup> "Art. 78: Insertion advertising may only be done during the live broadcast of recreational programs about sporting events or shows, provided that it does not disturb the view of them and does not occupy more than one sixth of the screen" (Ley Resorte, 2011).

## 1.5. Communication policies

The political dynamics of 2019 led Nicolás Maduro to establish greater control over the telecommunications sector and move towards the hegemonic dominance of emission capacity. On May 23, 2019, the Socialist Telecommunications and Postal Services Corporation was created (Presidential Decree n. 3.854), chaired by Jorge E. Márquez M., colonel of the Bolivarian National Guard, who also runs the Conatel. The objective of this unit is to entrust state-owned enterprises in the telecommunications sector, under the scheme of the socialist political model, promoted by the late President Hugo Chávez and Nicolás Maduro.<sup>7</sup> The decree gives the agency the power to acquire “in whole or in part” shares of domestic or foreign companies in the sector.<sup>8</sup> At the end of the year, no progress was made on the management of the agency or its impact. The designation of Márquez Monsalve, the existence of a radio station (Tiuna FM) and a television channel (TV Fanb), attached to the Ministry of Defense and an open television (Corazón Llanero), led by a member of the Bolivarian National Armed Forces, show the progressive militarization of the media sector in the country.

There is no progress in the regulatory framework that will govern the management of radio spectrum in the digital age. Official allocutions continued, which are mandatory transmissions by all televisions and radio stations of open signal and by national tele-

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<sup>7</sup> State-owned companies are attached to this corporation: Compañía Anónima Nacional de Telefonos de Venezuela (CANTV), Movilnet, Telecom Venezuela, Red de Transmisiones de Venezuela (REDTV), Telecomunicaciones Gran Caribe S.A. joint venture and the Instituto Postal Telegráfico (Ipostel). In particular, it is of concern the fact that CANTV is the company with the largest market share of basic telephony and internet services in the country.

<sup>8</sup> Article 3 of the decree of creation gives the government Socialist Corporation of Telecommunications and Postal Services the power to: “acquire all or part shareholding in all those commercial companies and services directly or indirectly related to their social object, whether owned by or merged with national or foreign entities, subject to authorization by the president of the Bolivarian Republic of Venezuela in the Council of Ministers”.

vision stations that broadcast for pay TV services.<sup>9</sup> In 2019, 116 compulsory transmitted allocutions were counted (with a total duration of 122 hours, 28 minutes and 54 seconds)<sup>10</sup>, with predominant content of political propaganda in favor of Maduro's presidential management.

On April 23, 2019, Juan Guaidó created the National Communication Center, "as an official information institution of the Legitimate Government and democratic forces, during the usurpation regime"<sup>11</sup>, to disclose information about Guaidó's governance.

## 1.6. Digital and mobile connectivity infrastructure

The blackout that affected the country during 2019 was also reflected in the management of the Conatel, which maintains opacity over telecommunications trends. For the closing date of this report, the published figures corresponded to the second quarter of 2019. For this period, internet penetration was 58.59%, showing a decrease of 0.1% compared to the end of 2018. Mobile penetration stood at 69,48%, of which, according to the Conatel, only 60.57% correspond to active mobile phone lines.<sup>12</sup>

Internet browsing speed presented difficulties, slowed down connections and made it difficult to access video content. According to Speedtest<sup>13</sup>, which monthly measures the ranking of mobile and fixed broadband speeds, in December 2019, the broadband connection in Venezuela was 3.42 Mbps for downloads and 1.45 Mbps for uploads, and the country ranked first in the world in slowness and the second before last in the continent (place 175 of 177). According to We are Social, Hootsuite and Datareportal<sup>14</sup>, 10 million inhabit-

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<sup>9</sup> According to article 10 of the Law on Social Responsibility in Radio, Television and Electronic Media (2010).

<sup>10</sup> <http://monitoreociudadano.org/cadenometro/>

<sup>11</sup> <https://presidenciave.com/comunicados/decreto-5-creacion-del-centro-de-comunicacion-nacional/>

<sup>12</sup> <http://www.conatel.gob.ve/estadisticas-anuales-y-trimestrales/>

<sup>13</sup> <https://www.speedtest.net/global-index/venezuela#fixed>

<sup>14</sup> <https://www.webfindyou.com.ve/blog/estrategias-de-mercadeo-digital-que-estan-usando-en-venezuela/>

ants connect from their smartphones, 14 million have account on Facebook and more than 4 million have account on Instagram.

A report by Michelle Bachelet (2019), a United Nations High Commissioner for Human Rights, prepared after a visit by the civil servant to Venezuela to check the human rights situation in the country, which was published on July 4, 2019, showed that “the speed of the internet is gradually slowing down, due to the lack of infrastructure investment” and added that “the government has blocked independent news websites and has regularly blocked main social networks” (Bachelet, 2019, p. 7). The international organization Freedom House (2019), in its report *Freedom on the net*<sup>15</sup>, called Venezuela a “non-free” country. It noted the systematic blockages of social networks and live streaming platforms by the state-owned CANTV and other service operators. Some coincided with political events or transmissions of messages by Juan Guaidó. There were blockages to Wikipedia during the month of January, as well as an unusual number of controversy editions linked to the review of Juan Guaidó’s oath as president in charge.

In relation to digital content streaming platforms or over-the-top (OTT) services, we must highlight the work of Venezolanos por la Información (VPI) and Vivo Play.<sup>16</sup> The signal for both broadcasts was blocked on February 22, 2019, when they transmitted the *Venezuela Aid Live* concert, held near the Venezuela-Colombia border, to raise funds and remedy the humanitarian crisis.

There are no official figures on video on demand (VoD) consumption. On social networks (Instagram and Facebook) and on portals such as Mercado Libre, subscriptions to Netflix are offered through the “parallel” or black market, with payment in local cur-

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<sup>15</sup> <https://freedomhouse.org/country/venezuela/freedom-net/2019>

<sup>16</sup> Venezuela radio, digital media and social media restrict its information content for fear of sanctions by the Conatel, based on the possible application of the Constitutional Law against Hate, for Peaceful Coexistence and Tolerance (2017), which punishes with up to 20 years in prison those who spread messages that promote hatred, discrimination or violence on social media or communication media.

rency. During 2019, a regulation came into force allowing banks to trade in foreign exchange and adding some restrictions on the foreign exchange control existing since 2003. This prompted the increasing use of foreign exchange in the daily life of Venezuela to the point that most paper currency transactions are now conducted in dollars, which made it easier for many people to hire VoD services.

### 1.7. Independent producers

Two projects stood out during the year. *Intrigas Tras Cámaras*, a 42-chapter telenovela, directed by Henry Galué and Edgar Liendo. This piece was produced by Chimera Vision, the same one that in previous years made the humor series *Hotel de Locura* (2011) and *Guerreras y Centauros* (2015), both transmitted by TVes. The second project is *Carolay* (2019), the youth music series inspired by a children’s play, produced by BG Creativos in the city of Maracaibo. Directed and produced by Oduver Cubillán, this 23-chapter series, although it did not reach the top ten, stands out because in a moment of crisis it is committed to both generating content for the youth audience and showing a geographical non-central area, which gives an account of the development potentials of audiovisual in the country’s provincial areas.

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

**Table 1. Fictions broadcasted in 2019 (national and imported; premiere and reruns; and co-productions)**

<p><b>PREMIERE NATIONAL TITLES – 2</b></p> <p><b>Venevisión – 1 title</b> 1. <i>Carolay</i> (series)</p> <p><b>TVes – 1 title</b> 2. <i>La Dama y el Vigilante</i> (telenovela)</p>	<p>7. <i>Eva Luna</i> (telenovela – Venezuela) 8. <i>El Chavo del 8</i> (series – Mexico) 9. <i>Guerra de Mujeres</i> (telenovela – Venezuela) 10. <i>Jugando a Ganar</i> (series – Venezuela) 11. <i>Qué Clase de Amor</i> (series – Venezuela) 12. <i>La Viuda Joven</i> (cinenovela – Venezuela)</p>
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<p><b>PREMIERE IMPORTED TITLES – 15</b></p> <p><b>Venevisión – 7 titles</b></p> <p>3. <i>El Amor Viene Con Todo</i> (telenovela – USA)</p> <p>4. <i>El Secretario</i> (telenovela – Colombia)</p> <p>5. <i>Enamorándome a Ramón</i> (telenovela – Mexico)</p> <p>6. <i>La Reina del Flow</i> (telenovela – Colombia)</p> <p>7. <i>Loquito por Ti</i> (telenovela – Colombia)</p> <p>8. <i>Mi Marido Tiene Más Familia</i> (telenovela – Mexico)</p> <p>9. <i>Tenías que Ser Tu</i> (telenovela – Mexico)</p> <p><b>Televen – 8 titles</b></p> <p>10. <i>Amar a Muerte</i> (telenovela – Mexico)</p> <p>11. <i>El Hijo del Cacique</i> (telenovela – Colombia)</p> <p>12. <i>Esmeralda, el Color de la Ambición</i> (telenovela – Colombia)</p> <p>13. <i>Heidi, Bienvenida a Casa</i> (telenovela – Argentina)</p> <p>14. <i>La Ley Secreta</i> (series – Colombia)</p> <p>15. <i>La Patrona</i> (telenovela – Mexico)</p> <p>16. <i>Zumba, Nadie me Quila lo Bailado</i> (telenovela – Colombia)</p> <p>17. <i>Yo No te Pido la Luna</i> (telenovela – Colombia)</p> <p><b>CO-PRODUCTIONS – 1</b></p> <p><b>Televen – 1 title</b></p> <p>18. <i>Soy Luna</i> (series – Argentina, Mexico)</p> <p><b>RERUNS – 33</b></p> <p><b>Venevisión – 18 titles</b></p> <p>1. <i>Amor Urbano</i> (miniseries – Venezuela)</p> <p>2. <i>Amor Secreto</i> (telenovela – Venezuela)</p> <p>3. <i>Cara Sucia</i> (telenovela – Venezuela)</p> <p>4. <i>Corazón Esmeralda</i> (telenovela – Venezuela)</p> <p>5. <i>Corazones extremos</i> (series – Venezuela)</p> <p>6. <i>Historia Musical</i> (series – Venezuela)</p>	<p>13. <i>Los Querendones</i> (telenovela – Venezuela)</p> <p>14. <i>Mi Niña Amada</i> (telenovela – Venezuela)</p> <p>15. <i>Rebeca</i> (telenovela – Venezuela, USA)</p> <p>16. <i>Robando Corazones</i> (telenovela – Venezuela)</p> <p>17. <i>Romance Musical</i> (telenovela – Venezuela)</p> <p>18. <i>Se Solicita Príncipe Azul</i> (telenovela – Venezuela)</p> <p><b>TVes – 2 titles</b></p> <p>19. <i>Que Pobres Tan Ricos</i> (telenovela – Mexico)</p> <p>20. <i>Teresa en Tres Estaciones</i> (telenovela – Venezuela)</p> <p><b>Televen – 13 titles</b></p> <p>21. <i>Amantes</i> (telenovela – Venezuela)</p> <p>22. <i>Archivos del Más Allá</i> (series – Venezuela)</p> <p>23. <i>Cuando me Enamoro</i> (telenovela – Mexico)</p> <p>24. <i>Escalona</i> (telenovela – Colombia)</p> <p>25. <i>Escándalos</i> (series Venezuela, Mexico, Panama)</p> <p>26. <i>Ellas Aman, Ellos Mienten</i> (telenovela – Venezuela)</p> <p>27. <i>Juana, la Virgen</i> (telenovela – Venezuela)</p> <p>28. <i>Nacer Contigo</i> (telenovela – Venezuela)</p> <p>29. <i>Nora</i> (telenovela – Venezuela, Mexico, USA)</p> <p>30. <i>Prueba de Fe</i> (series – Venezuela)</p> <p>31. <i>Tierra de Cantores</i> (telenovela – Colombia)</p> <p>32. <i>Tu Voz Estéreo</i> (series – Colombia)</p> <p>33. <i>Violetta</i> (series – Argentina)</p> <p><b>TOTAL PREMIERE TITLES: 17</b></p> <p><b>TOTAL RERUNS: 33</b></p> <p><b>TOTAL BROADCASTED TITLES: 50</b></p>
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Source: Obitel Venezuela

The Venezuelan screen was mainly fueled by national reruns. Some productions migrated from one channel to another, such as *La Patrona*. The channels aimed at recreating titles through new formats, such as *La Viuda Joven*, which was later displayed as *cinovela* on Sunday programming. Audiences were involved in the premiere scheduling through participation in surveys, such as the one framed in the campaign “Amante de Novela”, which *Cara Sucia* won (1992), ranked in the top ten.

Although four titles were produced, only two national productions were seen on open TV: *La Dama y el Vigilante* and *Carolay*. The first is a 12-episode comedy series, created by the state channel TVes and starring the channel’s president, Winston Vallenilla, and his wife, Marlene de Andrade. It is the story of a watchman, José David Sandoval, who falls in love with a young millionaire, Patricia Villalobos. While this series was presented in a fresh format, created to be displayed via social media (especially on YouTube), it was not well received by users. The series channel<sup>17</sup> hosts 12 episodes. The most visualized chapter was the first, with 8,153 (99 likes and 348 dislikes on May 21, 2020), while the last episode (released on December 22, 2019) recorded 1,632 views, 38 likes and 5 dislikes for the same date.

The second, *Carolay*, is a youthful musical series broadcasted on weekends by Venevisión. Its aesthetic narrative aspects resemble Disney productions (such as *Violetta* or *Soy Luna*) and meet the established patterns for youthful musicals. It tells the story of a girl (*Carolay*) who discovers that she is the daughter of a magical king (Mr. Buenísimo), inhabitant of the Sweet Planet. This discovery will bring her trouble with the villain of the story (the Sour Witch), who will impede her from becoming the heir of the throne. Unlike *La Dama y el Vigilante*, *Carolay* had a good reception from spectators.

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<sup>17</sup> <https://www.youtube.com/channel/UC4Hf1bnJa5KPUhDFtOKo7kA>

The series approaches useful topics to educate on values, giving this product educational-communicative characteristics.<sup>18</sup>

**Table 2. Premiere fiction in 2019: countries of origin**

Country	Titles	%	Chapters/ episodes	%	Hours	%
<b>NATIONAL (total)</b>	<b>2</b>	<b>11.1</b>	<b>35</b>	<b>2.5</b>	<b>35:00:00</b>	<b>3.0</b>
<b>OBITEL COUNTRIES (total)</b>	<b>16</b>	<b>88.9</b>	<b>1363</b>	<b>97.5</b>	<b>1116:20:00</b>	<b>97.0</b>
Argentina	1	5.6	105	7.5	87:50:00	7.6
Brazil	0	0.0	0	0.0	0:00:00	0.0
Chile	0	0.0	0	0.0	0:00:00	0.0
Colombia	8	44.4	566	40.5	471:40:00	41.0
Spain	0	0.0	0	0.0	0:00:00	0.0
USA (Hispanic production)	1	5.6	98	7.0	73:50:00	6.4
Mexico	5	27.8	554	39.6	443:00:00	38.5
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	2	11.1	35	2.5	35:00:00	3.4
<b>CO-PRODUCTIONS (total)</b>	<b>1</b>	<b>0.0</b>	<b>0</b>	<b>0.0</b>	<b>0:00:00</b>	<b>0.0</b>
Venezuelan co-productions	0	0.0	0	0.0	00:00:00	0.0
Co-productions between Obitel countries	1	5.6	40	2.9	40:00:00	2.9
<b>TOTAL</b>	<b>18</b>	<b>100.0</b>	<b>1398</b>	<b>100.0</b>	<b>1151:20:00</b>	<b>100.0</b>

Source: Obitel Venezuela

As in previous years, Colombia and Mexico stand out as the great suppliers of premiere fiction in Venezuela. Although Argentina's presence is timid, its productions exceeded the number of chapters generated in Venezuela. Between *Soy Luna*, a co-production of Argentina and Mexico, and *Heidi, Bienvenida a Casa*, only 16.7% were Venezuelan fictions.

<sup>18</sup> <http://www.ultimasnoticias.com.ve/noticias/chevere/venevison-estrena-hoy-la-serie-carolay/>

**Table 3. Formats of national and Ibero-American fiction**

Format	National				Ibero-American				
	Titles	%	C/E	H	Titles	%	C/E	H	%
<b>Telenovela</b>	0	0.0	0	0:00:00	15	93.8	1429	1042:30:00	90.0
<b>Series</b>	0	0.0	0	0:00:00	1	6.3	98	73:50:00	10.0
<b>Miniseries</b>	2	100.0	35	35:00:00	0	0.0	0	0:00:00	0.0
<b>Telefilm</b>	0	0.0	0	0:00:00	0	0.0	0	0:00:00	0.0
<b>Unitary</b>	0	0.0	0	0:00:00	0	0.0	0	0:00:00	0.0
<b>Docudrama</b>	0	0.0	0	0:00:00	0	0.0	0	0:00:00	0.0
<b>Other (soap opera, etc.)</b>	0	0.0	0	0:00:00	0	0.0	0	0:00:00	0.0
<b>Total</b>	<b>2</b>	<b>100.0</b>	<b>35</b>	<b>35:00:00</b>	<b>16</b>	<b>100.0</b>	<b>1527</b>	<b>1116:20:00</b>	<b>100.0</b>

Source: Obitel Venezuela

The most widespread format is the telenovela, which shows that the format is far from disappearing from Venezuelan screens. The series and miniseries remain in a low proportion, and a new format appears: the cinenovela, in which *La Viuda Joven* was exhibited. This format is part of the strategy of building stories from existing material and that could be thought of as a modality of trans-media narrative, although the name comes from the history of the photonovela, at the beginning of the 20th century.<sup>19</sup>

**Table 4. The ten most watched titles on open television**

	Title	Country of the original idea or script	Channel	Format/genre	N. of chap./ep. (2019)	Time slot	Rating	Share
1	<i>Loquito Por Ti</i>	Colombia	Venevisión	Telenovela	57	Prime time	2.6	15.2
2	<i>Mi Marido Tiene Más Familia</i>	Mexico	Venevisión	Telenovela	105	Prime time	2.4	14.6
3	<i>La Patrona</i>	Mexico	Televen	Telenovela	70	Prime time	2.2	11.7
4	<i>Zumba Despierta tu Pasión</i>	Colombia	Televen	Telenovela	98	Prime time	2.2	12.6
5	<i>Esmeraldas</i>	Colombia	Televen	Telenovela	55	Prime time	1.9	10.8
6	<i>La Ley Secreta</i>	Colombia	Televen	Series	80	Night	1.9	11.2
7	<i>Cara Sucia</i>	Venezuela	Venevisión	Telenovela	174	Night	1.8	11.0
8	<i>Yo No te Pido la Luna</i>	Colombia	Televen	Telenovela	138	Prime time	1.8	10.3
9	<i>Eva Luna</i>	Venezuela	Venevisión	Telenovela	141	Prime time	1.8	10.5

<sup>19</sup> “In 1915, the ‘cinenovela’ broke into Italy. No movies, no telenovela. A simple summary of the plot of a successful film, one of whose photographs, the solitary iconic ingredient of the print, served as a cover [...]. It includes the photographic selection of the chosen film, an image that is accompanied by the text that narrates them, and of ‘balloons’ that, as in comics, serve as a receptacle to the dialogues of the characters (all-hearted characters) [...]. In 1947, [...] it will be transfigured into photo telenovela” (Curiel, 2001, p. 32).

10	<i>Los Querendones</i>	Venezuela	Venevisión	Telenovela	122	Evening	1.8	15.9
<b>Total productions: 10</b>				<b>Foreign scripts: 7</b>				
100%				70%				

Source: Obitel Venezuela

**Table 4a. The ten most watched national titles on open television**

	Title	Country of the original idea or script	Channel	Format/genre	N. of chap./ep. (2019)	Time slot	Rating	Share
1	<i>Cara Sucia</i>	Venezuela	Venevisión	Telenovela	174	Night	1.86	11.07
2	<i>Eva Luna</i>	Venezuela	Venevisión	Telenovela	141	Prime time	1.82	10.57
3	<i>Los Querendones</i>	Venezuela	Venevisión	Telenovela	122	Evening	1.80	15.93
4	<i>Corazón Esmeralda</i>	Venezuela	Venevisión	Telenovela	139	Night	1.69	11.99
5	<i>Rebeca</i>	USA/ Venezuela	Venevisión	Telenovela	150	Prime time	1.66	9.86
6	<i>Amor Secreto</i>	Venezuela	Venevisión	Telenovela	80	Night	1.35	9.66
7	<i>Amantes</i>	Venezuela	Televen	Telenovela	112	Evening	1.04	10.40
8	<i>Prueba de Fe</i>	Venezuela	Televen	Series	33	Prime time	0.96	5.79
9	<i>Juana, la Virgen</i>	Venezuela	Televen	Telenovela	16	Evening	0.92	9.10
10	<i>Carolay</i>	Venezuela	Venevisión	Series	23	Evening	0.59	7.42
<b>Total productions: 10</b>				<b>Foreign scripts: 1</b>				
100%				10%				

Source: Obitel Venezuela

**Table 5. Audience profile of the ten most watched titles:  
gender, age, socioeconomic level**

	Title	Channel	Gender %		Socioeconomic level %		
			Women	Men	ABC	D	E
1	<i>Loquito por Ti</i>	Venevisión	3.0	2.0	1.5	3.1	2.0
2	<i>Mi Marido Tiene Más Familia</i>	Venevisión	3.2	1.6	1.1	3.3	1.1
3	<i>La Patrona</i>	Televen	2.7	1.7	1.4	2.5	2.2
4	<i>Zumba Despierta tu Pasión</i>	Televen	2.4	2.0	1.0	2.1	2.9
5	<i>Esmeraldas</i>	Televen	2.2	1.6	1.0	1.9	2.4
6	<i>La Ley Secreta</i>	Televen	1.9	1.9	0.9	2.1	1.8
7	<i>Cara Sucia</i>	Venevisión	2.5	1.1	0.8	2.4	1.0
8	<i>Yo No te Pido la Luna</i>	Televen	2.2	1.3	0.8	2.3	1.2
9	<i>Eva Luna</i>	Venevisión	2.7	0.8	0.7	2.7	0.4
10	<i>Los Querendones</i>	Venevisión	2.0	1.5	1.2	2.1	1.3

	Title	Channel	Age range							
			4-7	8-11	12-17	18-24	25-34	35-44	44-54	55+
1	<i>Loquito por Ti</i>	Venevisión	3.0	2.3	1.0	1.2	1.8	2.0	3.9	4.6
2	<i>Mi Marido Tiene Más Familia</i>	Venevisión	2.6	2.5	1.6	1.1	1.9	1.7	3.6	3.9
3	<i>La Patrona</i>	Televen	1.2	1.7	0.9	0.8	2.3	1.2	2.2	5.2
4	<i>Zumba Despierta tu Pasión</i>	Televen	1.0	2.5	0.5	0.9	3.0	1.7	1.9	4.0
5	<i>Esmeraldas</i>	Televen	1.3	2.1	0.5	0.3	2.6	1.6	1.6	3.7
6	<i>La Ley Secreta</i>	Televen	1.1	2.5	0.5	1.3	1.4	1.6	1.6	4.0
7	<i>Cara Sucia</i>	Venevisión	2.2	2.4	0.7	0.5	1.3	1.2	3.5	2.9
8	<i>Yo No te Pido la Luna</i>	Televen	1.5	1.4	0.5	0.6	1.4	0.7	1.2	5.2
9	<i>Eva Luna</i>	Venevisión	2.4	0.9	1.1	1.5	1.4	1.5	2.0	2.9
10	<i>Los Querendones</i>	Venevisión	0.5	1.1	0.8	1.0	1.8	1.2	1.5	4.0

Source: Nielsen Venezuela and Obitel Venezuela

### 3. VoD monitoring

In Venezuela, the development of video on demand (VoD) service is timid and there is still no record of relation between open TV channels and VoD platforms in the country. Consumers access popular platforms (Netflix, HBO Go, Hulu, among others), whose

subscription occurs in currencies based on various strategies: payment in bolivars of “hacked” accounts and available on social networks, or use of offshore accounts whose passwords are transferred by family or friends. Some companies, such as the North American DirectTV, through DirecTV Play and OnDirecTV, offer various packages. Users can subscribe to VoD platforms through their own applications (whether HBO Go, TNT Go and/or Paramount Channel Play, to name just a few). Inter also offers online channel service (Cartoon Network Go, TNT Go, Space Go, Fox, ESPN Play and Hot Go). Venezuelan productions circulate mostly on YouTube, which is additionally used as a repository.

### 3.1. VoD in Venezuela

**Chart 2. VoD in Venezuela**

	<b>Platforms</b>	<b>Total</b>
<b>VoD linked to open TV networks</b>	<b>Venevisión:</b> Venevisión Web, Venevisión Telenovelas, Venecomedia (channels on YouTube). <b>Televen:</b> Live signal on its portal and YouTube channel. <b>TVes:</b> Live signal on its portal and YouTube channel. <b>La Tele Tuya (TLT):</b> Live signal on its portal, YouTube channel and application. <b>Radio Caracas Television (RCTV):</b> YouTube channel	<b>5</b>
<b>VoD linked to pay TV networks</b>	HBO Go, TNT Go, Cartoon Network Go, IVC (YouTube), Fox Play, Comedy Central Play, Space Go, AMC, Antena 3, MTV Play, Paramount Channel Play, Nick, Sony Channel, AXN, ESPN Play, Hot Go.	<b>15</b>
<b>VoD linked to telecommunication companies</b>	DirecTV Play, Inter	<b>2</b>
<b>VoD without links to TV networks</b>	Vivo Play, ZUT.tv, Netflix, Amazon Prime, YouTube, Vimeo, Apple TV+, Hulu	<b>8</b>
<b>GENERAL TOTAL</b>		<b>30</b>

Source: Obitel Venezuela

Venezuelan open TV channels – which have television fiction – do not use VoD platforms. Venevisión<sup>20</sup> has a live signal on its

<sup>20</sup> Owned by the Cisneros Organization, one of the most important media groups in Venezuela today.

web portal and several channels on YouTube (Venevisión, Vene Comedia, Venevisión Telenovelas and Noticiero Venevisión) with old productions.

Vivo Play, platform developed in the country by IBC, includes in its programming the live signal of the channels TV Venezuela and IVC Network, among other international channels, such as RCN Nuestratele, RCN Novelas and NTN24. In addition, it contains information and opinion programs made in Venezuela and serial fiction productions from various countries such as Colombia and the United States. However, enjoying these productions is difficult for Venezuelans, who must use VPN (programs that allow users to cover up the IPs) and bypass the blockages imposed by the Conatel since April 2017.

Another platform created in Venezuela (2018), with the backing of Angostura Media and the direction of Rómulo Guardia (founder of MTV Latino and former vice-president of Development of RCTV), is ZUT.tv. It is free and offers music videos 24/7 through various screens, becoming a mix between YouTube and MTV, with its own application.<sup>21</sup>

### **3.2. Earnings from VoD systems**

Talking about the profits generated by VoD systems in the country is impossible due to information opacity. Efforts to consolidate VoD systems are not common practice and large corporations continue to bet on traditional television. Socioeconomic context and poor connectivity prevent many users from accessing VoD platforms as well as the range of devices required to access this service (smartTVs, videogame consoles, Blu-Ray, among others).

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<sup>21</sup> <http://cochinopop.com/noticias/tv-2/zut-tv-no-es-lo-que-quieren-ver-es-mucho-mas-que-eso/>

### 3.3. VoD analysis in 2019: national and Ibero-American premiere fiction

Netflix is the platform with the highest offer of Ibero-American titles. Table 6 includes the serial fictions from Obitel countries offered on Netflix with viewing in Venezuela.

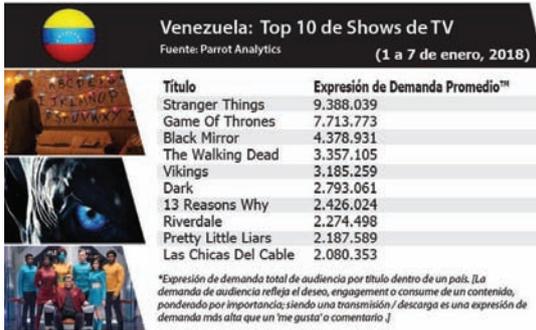
**Table 6. National and Ibero-American fiction broadcasted on VoD in 2019**

Premiere national titles	Premiere Ibero-American titles	Co-productions
<b>TVes (on YouTube) – 1 title</b> 1. <i>La Dama y el Vigilante</i> (series)	<b>Netflix – 24 titles</b> 1. <i>Siempre Bruja</i> (series – Colombia) 2. <i>Tijuana</i> (series – Mexico) 3. <i>Señora Acero 5</i> (series – Mexico) 4. <i>Alta Mar 1 y 2</i> (series – Spain) 5. <i>3% 3</i> (series – Brasil) 6. <i>Bolívar</i> (series – Colombia) 7. <i>Paquita Salas 3</i> (series – Spain) 8. <i>La Casa de Papel 3</i> (series – Spain) 9. <i>Las Chicas del Cable 4</i> (series – Spain) 10. <i>Sintonía</i> (series – Brazil) 11. <i>45 Revoluciones</i> (series – Spain) 12. <i>Frontera Verde</i> (miniseries – Colombia) 13. <i>Élite 2</i> (series – Spain) 14. <i>El Marginal 3</i> (series – Argentina) 15. <i>La Casa de las Flores 2</i> (series – Mexico) 16. <i>Hache</i> (series – Spain) 17. <i>Distrito Salvaje 2</i> (series – Colombia) 18. <i>El Club</i> (series – Mexico) 19. <i>Los Briceño</i> (series – Colombia) 20. <i>El Elegido 1 y 2</i> (series – Brazil) 21. <i>Días de Navidad</i> (miniseries – Spain) 22. <i>Preso n.º 1</i> (series – Mexico) 23. <i>La Pilota</i> (series – Mexico) 24. <i>El Vecino</i> (series – Spain)	<b>Netflix – 3 titles</b> 1. <i>Luis Miguel</i> (series – USA, Mexico) 2. <i>Soy Luna 3</i> (series – Argentina, Mexico) 3. <i>Vientos de Agua</i> (series – Argentina, Spain)
<b>Total: 1</b>	<b>Total: 24</b>	<b>Total: 3</b>
<b>GENERAL TOTAL: 28</b>		

Source: Obitel Venezuela

Venezuela has a single production that meets the characteristics of productions made to be broadcasted on VoD systems and with all international quality standards. *Almas en Pena (Lost Souls, 2019)*, an original thriller created by Martin Hahn and José Simón

Escalona, produced by RCTV Internacional, has not been released. It was not possible to locate the expressions of demand in Venezuela for the year 2019, only those for 2018.



**Table 7. VoD premiere fiction in 2019: countries of origin**

Country	Titles	%
<b>NATIONAL (total)</b>	<b>1</b>	<b>3.5</b>
<b>OBITEL COUNTRIES (total)</b>	<b>24</b>	<b>85.8</b>
Argentina	1	3.6
Brazil	3	10.7
Chile	0	0.0
Colombia	5	17.9
Spain	9	32.2
USA (Hispanic production)	0	0.0
Mexico	6	21.4
Peru	0	0.0
Portugal	0	0.0
Uruguay	0	0.0
Venezuela	1	3.5
<b>CO-PRODUCTIONS (total)</b>	<b>3</b>	<b>10.7</b>
Venezuelan co-productions	0	0.0
Co-productions between Obitel countries	3	10.7
<b>TOTAL GENERAL</b>	<b>28</b>	<b>100.0</b>

Source: Obitel Venezuela

The market is mainly composed of productions from Spain (32.2%), Mexico (21.4%), Colombia (17.9%), Brazil (10.7%) and Argentina (3.6%).

**Table 8. Formats of national and Ibero-American fiction on VoD**

Format	National				Ibero-American			
	Titles	%	C/P	%	Titles	%	C/P	%
Telenovela								
Series	1	100	12	100	25	92.6	445	97.6
Miniseries					2	7.4	11	2.4
Unitary								
Others								
<b>Total</b>	<b>1</b>	<b>100</b>	<b>12</b>	<b>100</b>	<b>27</b>	<b>100</b>	<b>456</b>	<b>100</b>

Source: Obitel Venezuela

In terms of formats, the series continue to gain ground, and this is evident in both the number of chapters and hours offered by most programs. *La Dama y el Vigilante* consists of 12 chapters with 60 minutes each (a format that resembles the standard of productions offered by VoD systems). This is also repeated in most of the series shown on Netflix, where the seasons have between eight and 13 episodes. However, some productions maintain the classic format of telenovelas (although they are listed as series), such as the Colombian series *Bolívar: una Lucha Admirable* (60 episodes just in the first season), *Los Briceño: una Familia Todo Terreno* (63 chapters in the first season) and the Mexican series *Preso n.º 1* (44 chapters in the first season) and *La Piloto* (82 chapters in the second season). Also noteworthy are two miniseries from Colombia, the series *Frontera Verde* and the Spain production *Días de Navidad*.

#### 4. Fiction analysis: open TV, VoD and transmedia expressions in networks

For another year, national channels made efforts to place their viewers interacting through their Twitter, Instagram and Facebook accounts, about their various productions and artists. Most of the promotion was not in the context of fiction, but in variety and maga-

zine programs. These programs, adapted to 2.0 trends, have incorporated “interactive sets”, in which their presenters spend a few minutes reading the comments of internet users on social networks, always guided by the use of a hashtag. Venevisión’s magazine *Portada*’s conducted a social media survey in the second half of 2018 for its internet users to vote for the channel’s telenovela that they would like to see on screen again. The Instagram lives also set a trend in 2019: different artists made it fashionable to pause a specific time to connect live through this social network and talk directly to their followers about their life, work, and the complex humanitarian emergency that the country undergoes.

In Venezuela, transmediation is not used to expand narratives, but as a technique to foster interaction with audiences – a phenomenon that is transnational. The fact that during 2019 national fiction production had been low and that, therefore, there had been no promotion of transmediation on national fiction channels did not imply that this year the Venezuelan public has been oblivious to these dynamics. This is not only because in the country there is a very wide audience that consumes foreign fiction through subscription television (from which viewers are also directly placed to interact through social networks), but also because the success of the same foreign titles broadcasted on national channels leads viewers to want to interact more and directly with those content on digital platforms.

Although it may be the case of any fiction production, the most viewed title of the year in Venezuela is taken as an example: *Loquito por Ti*, from Colombia. This production is available in paid version on the streaming platform Caracol Play. Its original music can be accessed on Spotify, users can interact directly with their official content through the Instagram account @loquitoporticaracol\_tv, or even join the sign petition on the platform Change.org for the second season to occur. All this, from anywhere in the world, including Venezuela, despite connectivity limitations and no need for promotion on open television, because transmedia interaction is a possibility that depends on the skills and interests of each user. That is the

reason, in 2019, for Netflix to establish itself in the country as an important source of access to fiction.

## 5. Highlights of the year

We highlight the broadcast of premiere serial fiction on subscription channels, especially IVC Networks and Ve Plus. The first exhibited nine imported titles during 2019, which ranked it above Venevisión and at the same level as Televen, the two most developed channels regarding serial fiction exhibition. IVC Networks included Colombian productions in its programming – *Bloque de Búsqueda*, *Hermanos y Hermanas*, *Regálame la Vida*, *La Ley del Corazón*, *Metástasis* and *Vecinos* –, two productions from Obitel countries – *Cita a Ciegas* (Spain) and *Las Vegas* (Chile) – and a Turkish series – *Habitación 309*. Ve Plus broadcast *Carolay*, *La Revancha* and *El Amor las Vuelve Locas*.

Noteworthy is the controversy brought by the production of a reality show created to be broadcasted on the digital platform YouTube: the webshow *Venezuela Shore*. This is a program recorded in the city of Lecherías (Anzoátegui state, in the northeast of the country) that sought to imitate the famous show of the American network MTV, *Jersey Shore*. This reality show, classified by the audience as “marginal” and “ridiculous”, shows the coexistence of seven young “influencers”: Rodrigo, Polette, Nataly, Isabela, Rafa, Juan and Ricardo. They present themselves to the cameras as carefree, party and vulgar young people. Although the exact age of the protagonists is not known, attorney general Tarek William Saab announced the opening of an investigation due to the large number of complaints made by users. Several chapters of the reality show under the name *Casa Youtuber* are still available on YouTube. Most viewers expressed that *Venezuela Shore* is a show that represents neither the values nor the feeling of Venezuelans.<sup>22</sup>

<sup>22</sup> <https://www.publimetro.cl/cl/social/2019/10/04/venezuela-shore-investigacion-penal-reality-influencers-venezonales-youtube.html>

On the other hand, it is necessary to mention the Venezuelan diaspora of the audiovisual sector. Highlights include the series *Killing Tigers* (*Matando Tigres*, 2019), recorded in New York and performed, produced and directed by Venezuelan Stefano Fossa. Closer to the language of cinema, it refers to the universe of migration and small, immediate and non-permanent works as a survival practice. Countries such as Mexico, Colombia and the United States have become the main refuges of Venezuelan creators. Some examples are: the writers Lupe Gehrenbeck (*La Noche de Dos Lunas, Tierra Adentro*), Gennys Pérez (*Aunque Mal Paguen, Mi Prima Ciela, ¡Qué Clase de Amor!*) and Rosa Clemente (*Girasoles para Lucía, Los Caballeros las Prefieren Brutas, La Negociadora, Pambelé, La Hermandad*); the producers Carlos Bardasano (*La Piloto, Amar a Muerte, Las Buchonas, La Bella y las Bestias*), José Vicente Scheuren (*Decisiones: Unos Ganan, Otros Pierden, La Fuerza de Creer 2, Ana Polo Rules*) and Diego Borjas (film and commercial producer); the art directors Erasmo Colón (*Club 57, Jenni Rivera: Mariposa de Barrio, Al Otro Lado del Muro*) and Evelyn Villegas (*La Doña, Cosita Rica, Calypso*); the directors Carlos Villegas (*Los Miserables, La Doña, La Patrona*) and Nicolas Di Blassi (*Al Otro Lado del Muro, Jenni Rivera: Mariposa de Barrio, El Chema, Eva, la Trailera*); as well as Raúl Prieto, who is a member of Punta Fina Content Factory (Mexico).

Another aspect that is worth noting is that Venezuela and its socio-political context are used as a theme for the creation of content in foreign forces, mainly in drug-dealing telenovelas. The second season of the American series *Jack Ryan* (Amazon Prime Video) was set entirely in Venezuela. This time CIA agent Ryan travels to Caracas on a diplomatic mission to rescue the country from the chaos in which it is submerged. Here are shown, in a fictional tone, many of the problems that the country has faced, such as the long queues for food, and, although the plot shows a clear foreign interference, this exercise of imagination was celebrated by a part of the opposition to the government of Nicolás Maduro. The Colombian

series *La Nocturna*, in its second season, shows the character Valery Rosero, who plays a Venezuelan migrant that must leave her country driven by its serious economic and political situation.

## 6. Theme of the year: melodrama in times of streaming

The Venezuelan telenovela industry conquered international markets between 1960 and the late 1990s, producing up to 12 telenovelas per year.<sup>23</sup> The main open signal channels – RCTV and Venevisión – competed to position more telenovelas abroad. Today there is very little left of this promising picture. Since the closure of RCTV on May 27, 2007, the production of Creole telenovelas has been reduced. Thus, in the words of Leonardo Padrón, “[...] since that year, the collapse of the industry was accelerating to the point that between 2014 and 2015, with the advance of the economic crisis, the channel that competed with RCTV – Venevisión – was ending the contracts with its writers [...]. By then, three telenovelas were produced a year”.<sup>24</sup>

Starting in 2000, the melodrama in the Venezuelan telenovelas began to detach from the traditional canons imposed by the melodrama of the Mexican ones. Several telenovelas produced mostly by RCTV resized the main characters and, consequently, the incidence of their actions in the story. For example, in *La Mujer de Judas* (2002) the protagonist was a serial killer and in *Mi Gorda Bella* (2002) she was a chubby woman. Understanding that the audience at the time demanded changes, Venezuelan melodrama rethought the content and form of the speech breaking with some hard and inviolable codes for the executives of the time. During the first decade of this century, melodrama was mixed with genres such as social realism, police and comedy. At the time it met the demands of the audience, something that is very different today, when the market of

<sup>23</sup> <https://www.larepublica.co/globoeconomia/telenovelas-venezolanas-sufren-su-mayor-crisis-y-estan-a-punto-de-desaparecer-2810868>

<sup>24</sup> Idem.

the new generations demands more aggressive narratives in content and form, as long as they do not neglect the characteristics of melodrama as a genre.

Audiovisual production in Venezuela is currently disoriented and, therefore, it cannot define an approximation to melodrama for streaming content. As established in most of the country's producing houses, creations are supposed to be guided by the international paradigms of successful series, but the infrastructure is insufficient and human capital is not trained, making it difficult to achieve a novel product of melodramatic fiction for VoD. The transformation of Venezuelan melodrama to a more competitive and current one depends not only on the script, but also on all the machinery that can interpret and materialize it. The important thing is that the efforts are being made and the goal is to reach digital platforms with original content, in addition to meeting production standards.

In 2019, only four new productions were made:

1) *#Eneamiga*, a modern story with 60 chapters, divided into four seasons, which chronicles the love between high school student friends who meet again years later. The plot revolves around social media. It was produced by RCTV productions and transmitted via cable by IVC Network.; 2) *Carolay*, youth music series, an independent production broadcast by Venevisión; 3) *Almas en Pena*, a big-budget series, with 13 chapters, based on Latin American popular legends, such as *La Sayona*, *El Sombrero* and *La Planchada*, not aired yet and produced by RCTV; 4) *La Dama y el Vigilante*, produced and broadcasted by the state channel TVes. None of these productions are broadcasted on the few Venezuelan VoD systems, although they are present on Latin American subscription TV channels, such as Chocolate, TLNovelas or Ve Plus (formerly called Novelisíma). Several of the open TV channels have telenovela repositories, which can be viewed directly on their websites, as is the case of Venevisión. There is a list of productions available on its website and also on a YouTube channel named Venevisión Novelas, being the most recent *Para Verte Mejor* (2017).

Televen TV serves as a repository for several of its productions and, unlike Venevisión Novelas, most of its content is newscasts, talk shows and magazines. In addition, this channel has on its website a live signal in which the contents aired on open TV can be watched, thus entering the category of internet television (TVi).

The state channel TVes has a YouTube channel called TVes al Día, where it shows the programming aired on open TV. Among these programs is *La Dama y el Vigilante*. The premiere of this production was simultaneously broadcasted on open TV, YouTube, Facebook, Instagram and Twitter (via @TVesaldia and @DamaY-ElVigilante accounts). There is a YouTube channel dedicated exclusively to the transmission of a version of this telenovela for the web.

Generally speaking, open TV channels rely on OTT platforms such as YouTube for audiences to see melodramas broadcast in previous years, but newer productions are not available. We must add that RCTV Producciones (derived from what was once the RCTV channel) continues to work independently and there is a YouTube channel called RCTV where productions from previous years are archived.

Vivo Play broadcasted in 2019 the webseries *El Cabaret* (2017). Although it is a production made in the United States, in the starring role is the former Venezuelan Miss Universe Alicia Machado. In relation to this production, Nelson Hulett says that “innovates in its format, language and short duration, being specially designed and developed to adapt the traditional scheme of telenovelas and series to the new consumption habits of mobile phone users and digital platforms”.<sup>25</sup>

The practice of reducing chapters and presenting them seasonally has also been developed in Venezuelan productions in 2019. *Carolay*, *La Dama y el Vigilante* and *#Eneamigas* have been structured in series format. The contents have been divided to present

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<sup>25</sup> <https://highhilleentertainment.com/vivoplay-trae-a-tus-pantallas-el-cabaret-web-serie-protagonizada-por-alicia-machado/>

seasons of 12 to 15 chapters. Changes are observed in the format that adapt to the preferences of the new generations, however the productions are not yet intended to be seen on multiple screens, but mainly on the TV screen.

Some foreign VoD platforms operated by Venezuelans offer national telenovelas. They are “classic” productions that were most successful internationally. Thus, the VoD platform Pongalo (service aimed at Latino audience) distributes content to third parties through its site Pongalo Novela Club. This initiative, which started from YouTube, now has its own application and makes available content for mobile, tablet, computers and TV, as well as through Roku, Chromecast and Apple TV digital media players. Pongalo, headquartered in Miami and a subsidiary of 1BC Business Group, was acquired in 2019 by the digital medium VIX (former Planeta Networks). Pongalo’s grid includes 66 Venezuelan melodramatic productions of different years, all produced by RCTV TV. Among the titles are: *Estefanía* (1979), by Julio Cesar Marmol; *Piel Salvaje* (2016), by Martín Hahn, inspired in the telenovela *La Fiera*, by Julio César Marmol; the series *Hoy te Vi* (1998) and *Pura Pinta* (2007). Pongalo is present on Amazon Prime platform and telenovelas can be viewed by Amazon users with an additional payment if they are not prime users.

In 2019, as in previous years, the presence of Venezuelan serial fiction on Netflix, the most popular VoD platform, is null, although there is a presence of original scripts, companies and Venezuelan talent in various VoD productions. *Jane The Virgin* (2014), a serial fiction inspired by the Venezuelan telenovela *Juana la Virgen* (RCTV, 2002), written by Perla Farías, became very popular with the American and Latino audiences and remained on the air for five seasons. Regarding Venezuelan companies and talents, the Venezuelan production company *El Living* produced the third stage of Spain’s *La Casa de Papel*, which was broadcast only on streaming. Cinemat USA, owned by Venezuelan José Vicente Scheurent, also produced *Club 57*. In terms of talent, we find leading actors in

series, such as Edgar Ramírez, who starred in the second season of the series *American Crime Story*; Luis Gerónimo Abreu, who plays Bolívar in the Colombian series produced for Netflix *Bolívar: una Lucha Admirable*; and Francisco Denis, who performs in *Narcos* (USA, 2017), *El Comandante* (Colombia, 2017) and in the second season of *Jack Ryan* (USA, 2019), the latter with participation from Amazon Studios.

Finally, after the intermittency of production of Venezuelan telenovelas (serial or long ones) that began to be seen in the second decade of this century, local products were losing international market. Turkish productions with very high quality and low price in the markets displaced Venezuelan telenovelas among others. The noticeable decline in investment in domestic production, the migration of talent and operational difficulties due to the situation of the country were reasons why telenovelas were shifted to the category of third-party products, which have positive effects only on open television. While the country offers favorable conditions for foreign independent producers, the political situation does not guarantee the successful development of the product or even its completion. Reaching Venezuela's niche in the first decade of this century will be hard work that deserves a risky capacity, not only regarding money, but also about rethinking of dramatic content. However, the work has already begun: there is Venezuelan talent betting on a new audiovisual production for streaming consumption.

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## TOP TEN TV FICTION IN OBITEL COUNTRIES

### ARGENTINA

#### 1. *Argentina, Tierra de Amor y Venganza*

**Production:** Pol-ka Producciones

**Direction:** Martín Saban, Sebastián Pivotto, Alejandro Ibáñez, Rodolfo Antúnez

**Script:** Leandro Calderone, Carolina Aguirre

**Cast:** Gonzalo Heredia, China Suárez, Albert Baró, Delfina Chaves, Julia Calvo, Candela Vetrano, Malena Sánchez, Diego Domínguez

**Exhibition dates (in 2019):** 3/11 to 12/30

#### 2. *Pequeña Victoria*

**Production:** The MediaPro Studio, Viacom, Telefe

**Direction:** Daniel Burman

**Script:** Erika Halvorsen, Mara Pescio

Anita Accorsi, Martín Vatenberg

**Cast:** Julieta Díaz, Natalie Pérez, Inés Estévez, Mariana Genesio Peña, Luciano Castro, Daniel Hendler, Nicolás Francella, Facundo Arana

**Exhibition dates (in 2019):** 9/16 to 12/11

#### 3. *El Marginal 3*

**Production:** Underground Producciones

**Direction:** Luis Ortega

**Script:** Adrián Caetano, Guillermo Salmerón, Silvina Olschansky

**Cast:** Nicolás Furtado, Claudio Rissi, Gerardo Romano, Martina Gusmán, Carlos Portaluppi, Abel Ayala, Brian Buley, Daniel Pacheco, Marcelo Peralta

**Exhibition dates (in 2019):** 7/9 to 8/25

#### 4. *El Host*

**Production:** The Walt Disney Company Latin America, Pol-ka Producciones

**Direction:** Sebastián Pivotto

**Script:** Sebastián Borestein

**Cast:** Adrián Suar, Nicolás Vázquez, Martín Bossi, Natalie Pérez, Soledad Villamil, Celeste Cid, Julieta Nair Calvo, Soledad Fandiño

**Exhibition dates (in 2019):** 10/2 to 10/9

#### 5. *El Tigre Verón*

**Production:** Pol-ka Producciones, Cablevisión, Turner International Argentina

**Direction:** Daniel Barone

**Script:** Marcos Osorio Vidal, Germán Maggiori

**Cast:** Julio Chávez, Andrea Pietra, Marco Antonio Caponi, Sofía Gala Castiglione, Manuel Callau, Muriel Santa Ana, Alejandra Flechner, Roberto Vallejos

**Exhibition date (in 2019):** 7/10 to 9/26

### **6. *Otros Pecados***

**Production:** Pol-ka Producciones, Cablevisión, Turner International Argentina

**Direction:** Daniel Barone, Jorge Nisco

**Script:** Mariano Pensotti, Mariano Tenconi, Patricio Vega, Carolina Aguirre, Leandro Calderone, Alejandro Ocón

**Cast:** Leonardo Sbaraglia, Norman Briski, Diego Velázquez, Valeria Lois, Marcelo D'Andrea, Justina Bustos, Paola Krum, Federico Olivera

**Exhibition date (in 2019):** 4/17 to 6/19

### **7. *Bajo Presión***

**Production:** Conspiração Filmes, Globo

**Direction:** Andrucha Waddington, Mini Kerti

**Script:** Jorge Furtado, Lucas Parai-zo, Antonio Prata, Márcio Alemão

**Cast:** Júlio Andrade, Marjorie Estiano, Stepan Nercessian, Bruno Garcia, Tatsu Carvalho, Pablo Sanábio, Orã Figueiredo, Heloísa Jorge

**Exhibition date (in 2019):** 1/1 al 1/11

### **8. *Campanas en la Noche***

**Production:** Telefe Contenidos

**Direction:** Negro Luna, Omar Aiello

**Script:** Lily Ann Martin, Jessica Valls, Renato D'Angelo, Juan José Ciuffo

**Cast:** Federico Amador, Calu Rivero, Esteban Lamothe, Eugenia Tobal, Patricia Viggiano, Martín Slipak, Rodrigo Guirao, Franco Masini

**Exhibition date (in 2019):** 1/14 to 5/15

### **9. *Chueco en Línea***

**Production:** Pol-ka Producciones, Cablevisión

**Direction:** Rodolfo Antúnez

**Script:** Esteban del Campo

**Cast:** Adrián Suar, Darío Barassi, Belu Lucius, Iair Said, Tomás Kirzner

**Exhibition date (in 2019):** 12/17 to 12/20

### **10. *Verdades Secretas***

**Production:** Globo

**Direction:** Mauro Mendonça Filho

**Script:** Walcyr Carrasco, Maria Elisa Berredo

**Cast:** Camila Queiroz, Rodrigo Lombardi, Drica Moraes, Reynaldo Gianecchini, Grazi Massafera, Marieta Severo, Agatha Moreira, Gabriel Leone

**Exhibition date (in 2019):** 1/14 to 3/24

## **BRAZIL**

### **1. *A Dona do Pedaço***

**Production:** Globo

**Direction:** Amora Mautner, Luciano Sabino

**Script:** Walcyr Carrasco

**Cast:** Juliana Paes, Marcos Palmeira, Reynaldo Gianecchini, Agatha Moreira, Paolla Oliveira, Sérgio Guizé, Nathalia Dill, Lee Taylor

**Exhibition date (in 2019):** 5/20 to 11/22

### **2. *O Sétimo Guardião***

**Production:** Globo

**Direction:** Rogério Gomes, Allan Fiterman

**Script:** Aguinaldo Silva

**Cast:** Bruno Gagliasso, Marina Ruy Barbosa, Lília Cabral, Tony Ramos, Elizabeth Savalla, Eduardo Moscovis, Dan Stulbach, Letícia Spiller

**Exhibition date (in 2019):** 1/1 to 5/17

### **3. *Bom Sucesso***

**Production:** Globo

**Direction:** Luiz Henrique Rios, Marcus Figueiredo

**Script:** Rosane Svartman, Paulo Halm

**Cast:** Antônio Fagundes, Grazi Massafera, Rômulo Estrela, Da-

vid Junior, Fabiula Nascimento, Armando Babaioff, Lúcio Mauro Filho, Ingrid Guimarães

**Exhibition date (in 2019):** 7/29 to 12/31

### **4. *Amor de Mãe***

**Production:** Globo

**Direction:** José Luiz Villamarim

**Script:** Manuela Dias

**Cast:** Regina Casé, Adriana Esteves, Taís Araújo, Murilo Benício, Vladimir Brichta, Irandhir Santos, Chay Suede, Jéssica Ellen

**Exhibition date (in 2019):** 11/25 to 12/31

### **5. *Verão 90***

**Production:** Globo

**Direction:** Jorge Fernando, Marcelo Zambelli

**Script:** Izabel de Oliveira, Paula Amaral

**Cast:** Isabelle Drummond, Rafael Vitti, Cláudia Raia, Dira Paes, Jesuíta Barbosa, Camila Queiroz, Tóti Meireles, Alexandre Borges

**Exhibition date (in 2019):** 5/29 to 7/26

### **6. *O Tempo Não Para***

**Production:** Globo

**Direction:** Leonardo Nogueira, Marcelo Travesso, Adriano Melo

**Script:** Mário Teixeira

**Cast:** Juliana Paiva, Nicolas Prates, Edson Celulari, Christiane Torloni, Rosi Campos, Milton Gonçalves, João Baldasserini, Cleo

**Exhibition date (in 2019):** 1/1 to 1/28

### 7. *Órfãos da Terra*

**Production:** Globo

**Direction:** Gustavo Fernandez, André Câmara

**Script:** Thelma Guedes, Duca Rachid

**Cast:** Julia Dalavia, Renato Góes, Alice Wegmann, Ana Cecília Costa, Marco Ricca, Eliane Giardini, Paulo Betti, Carmo Dalla Vecchia

**Exhibition date (in 2019):** 4/2 to 9/27

### 8. *Cine Holliúdy*

**Production:** Globo

**Direction:** Patricia Pedrosa, Halder Gomes, Renata Porto

**Script:** Halder Golmes, Marcio Wilson, Claudio Paiva

**Cast:** Edmilson Filho, Letícia Colin, Heloísa Périsse, Haroldo Guimarães, Gustavo Falcão, Matheus Nachtergaele

**Exhibition date (in 2019):** 5/7 to 7/23

### 9. *Éramos Seis*

**Production:** Globo

**Direction:** Carlos Araújo, Pedro Peregrino

**Script:** Angela Chaves

**Cast:** Glória Pires, Antonio Calloni, Danilo Mesquita, Nicolas Prattes, Giullia Buscacio, André Luiz Frambach, Cassio Gabus Mendes, Simone Spoladore

**Exhibition date (in 2019):** 9/30 to 12/31

### 10. *Sob Pressão*

**Production:** Globo, Conspiração Filmes

**Direction:** Andrucha Waddington

**Script:** Lucas Paraizo

**Cast:** Júlio Andrade, Marjorie Estiano, Bruno Garcia, Drica Moraes, Pablo Sanábio, Josie Antello

**Exhibition date (in 2019):** 5/2 to 7/25

## COLOMBIA

### 1. *Loquito por Ti*

**Production:** Caracol

**Direction:** Jaime Rayo, Andrés Biermann

**Script:** Carlos Fernández Soto, Ana Fernanda Martínez

**Cast:** Mariana Gómez, Variel Sánchez, Sebastián Carvajal.

**Exhibition date (in 2019):** 1/14 to 2/8

### 2. *La Gloria de Lucho*

**Production:** Teleset, Sony Pictures Television

**Direction:** Olga Lucía Rodríguez, Luis Carlos Sierra

**Script:** Juan Andrés Granados, Gerardo Pinzón

**Cast:** Enrique Carriazo, Verónica Orozco, Kathy Sáenz

**Exhibition date (in 2019):** 2/11 to 6/7

### 3. *El Bronx*

**Production:** Fox Telecolombia

**Direction:** Sergio Osorio, Santiago Vargas, Felipe Paredes

**Script:** Gustavo Bolívar, Yesmer Uribe

**Cast:** Jose Julian Gaviria, Rosmeri Marval

**Exhibition date (in 2019):** 1/29 to 27/5

### 4. *Bolívar*

**Production:** Caracol

**Direction:** Luis Alberto Restrepo, Andrés Beltrán, Jaime Rayo

**Script:** Juana Uribe

**Cast:** Luis Gerónimo Abreu, José Ramón Barreto, Shany Nadan

**Exhibition date (in 2019):** 6/21 to 9/18

### 5. *La Piloto II*

**Production:** Lemon Studios

**Direction:** Rolando Ocampo, Fernando Rovzar, Álvaro Curiel, David Ruiz, Jorge “Tocayo” Ramírez

**Script:** María Cecilia Boenheim, Carolina Barrera, Luis Guerrero, Jairo Estrada, Jorge Cervantes

**Cast:** Livia Brito, Arap Bethke, María Fernanda Yepes, Alejandro Nones, María de la Fuente

**Exhibition date (in 2019):** 3/14 to 9/30

### 6. *Un Bandido Honrado*

**Production:** Caracol

**Direction:** Mario Ribero, Andrés Marroquín

**Script:** Juan Manuel Cáceres, Elkin Ospina, Héctor Alejandro Moncada

**Cast:** Diego Vásquez, Carolina Acevedo

**Exhibition date (in 2019):** 6/10 to 9/9

### 7. *María Magdalena*

**Production:** Dopamine, Sony Pictures Television

**Direction:** Felipe Cano, Rodrigo Lalinde

**Script:** Lina Uribe, Darío Vanegas, Jaqueline Vargas

**Cast:** María Fernanda Yepes, Manolo Cardona

**Exhibition date (in 2019):** 5/27 to 9/13

### 8. *Las Muñecas de la Mafia*

**Production:** Caracol

**Direction:** Luis Alberto Restrepo

**Script:** Juan Camilo Ferrand

**Cast:** Amparo Grisales

**Exhibition date (in 2019):** 7/8 to 9/30

### 9. *Enfermeras*

**Production:** RCN

**Direction:** Victor Cantillo, Luis Carlos Sierra

**Script:** Patricia Ramírez, Carolina López, Catalina Palomino

**Cast:** Diana Hoyos, Sebastián Carvajal

**Exhibition date (in 2019):** 10/23 to 12/30

### **10. *La Ley Secreta***

**Production:** Caracol

**Direction:** Andrés Beltrán, Carlos Mario Urrea, Mateo Stivelberg

**Script:** Jhonny Ortiz, Adriana Barreto, Karen Rodríguez

**Cast:** Viña Machado, Luna Baxter, Juana del Río

**Exhibition date (in 2019):** 10/1 to 12/30

## **MEXICO**

### **1. *Silvia Pinal Frente a Ti***

**Production:** Televisa

**Direction:** Mónica Miguel

**Script:** Adriana Lorenzón, Rosa Salazar, Lele Portas, Marco Tulio, Víctor Manuel Fouilloux

**Cast:** Itatí Cantoral, Gonzalo Guzmán, Pablo Montero, Ernesto Laguardia, Adriana Nieto, Harry Geithner, Alberto Casanova, Arturo Peniche

**Exhibition date (in 2019):** 2/24 to 3/22

### **2. *La Rosa de Guadalupe***

**Production:** Televisa

**Direction:** José Ángel García, Marta Luna, Ricardo de la Parra, Eduardo Said, Lorena Maza

**Script:** Carlos Mercado

**Cast:** Actors from CEA (Acting School, Televisa)

**Exhibition date (in 2019):** 1/1 to 12/31

### **3. *La Usurpadora***

**Production:** Televisa

**Direction:** Francisco Franco

**Script:** Inés Rodena

**Cast:** Sandra Echeverría, Andrés Palacios, Queta Lavat, Arap Bethke, Ana Bertha Espín, Germán Bracco, Daniela Schmidt, Juan Manuel Jáuregui

**Exhibition date (in 2019):** 9/2 to 10/4

### **4. *Por Amar sin Ley 2***

**Production:** Televisa

**Direction:** Salvador Garcini, Alejandro Gamboa

**Script:** Mónica Agudelo

**Cast:** Ana Brenda Contreras, David Zepeda, Julián Gil, José María Torre, Sergio Basañez, Altair Jarabo, Guillermo García Cantú, Víctor García, Leticia Perdígón

**Exhibition date (in 2019):** 3/3 to 7/5

### **5. *Ringo: la Pelea de su Vida***

**Production:** Televisa

**Direction:** Claudia Elisa Aguilar, Jorge Robles

**Script:** Leandro Calderone

**Cast:** José Ron, Mariana Torres, César Évora, Jorge Poza, Silvia Mariscal, Otto Sirgo, Luz Ramos, Óscar Bonfiglio

**Exhibition date (in 2019):** 1/21 to 5/12

**6. *Como Dice el Dicho***

**Production:** Televisa

**Direction:** Emmanuel Dúprez

**Script:** several

**Cast:** Sergio Corona, Wendy González, Michael Ronda, Brisa Carrillo, Benny Emmanuel, Fernanda Sasse

**Exhibition date (in 2019):** 4/15 to 9/25

**7. *Soltero con Hijas***

**Production:** Televisa

**Direction:** Bonnie Cartas, Aurelio Ávila

**Script:** Pablo Ferrer, Santiago Pineda

**Cast:** Gabriel Soto, Vanessa Guzmán, Mayrín Villanueva, María Sorté, Pablo Montero, Laura Flores, Irina Baeva, René Strickler

**Exhibition date (in 2019):** 10/28 to 2/23

**8. *Sin Miedo a la Verdad***

**Production:** Televisa

**Direction:** Carlos González Sarrñana, Jacopo Fontana

**Script:** several

**Cast:** Alex Perea, Dacia González, Tania Niebla, Ligia Uriarte, Fermín Martínez, Israel Islas, Paola Migue, Carlos Barragán

**Exhibition date (in 2019):** 7/8 to 9/29

**9. *Doña Flor y sus Dos Maridos***

**Production:** Televisa

**Direction:** Benjamín Cann

**Script:** Juan Andrés Granados

**Cast:** Ana Serradilla, Sergio Mur, Joaquín Ferreira, Mariluz Bermúdez, Rebeca Jones, Alejandro Calva, Roberto Blandón, Carlos Corona

**Exhibition date (in 2019):** 3/25 to 6/21

**10. *Cuna de Lobos***

**Production:** Televisa

**Direction:** Eric Morales

**Script:** Lily Ann Martin, Claudio Lacelli

**Cast:** Paz Vega, Gonzalo García, Diego Amozurrutia, Nailea Norvind, Flavio Medina, Azela Robinson, José Pablo Minor, Leonardo Daniel

**Exhibition date (in 2019):** 10/7 to 11/8

**PERU**

**1. *De Vuelta al Barrio***

**Production:** América Televisión

**Direction:** Jorge Tapia, Toño Vega

**Script:** Gigio Aranda

**Cast:** Paul Martin, Mónica Sánchez, Yvonne Frayssinet, Adolfo Chuiman, Melania Urbina, Lucho Cáceres

**Exhibition date (in 2019):** 4/9 to 12/23

**2. *Señores Papis***

**Production:** Del Barrio Producciones

**Direction:** Julián Alexander, Frank Pérez-Garland, Francisco Álvarez

**Script adaptation:** Aldo Miyashiro, Alejandro Alva, Lucía Ruíz, Fiorella Méndez

**Cast:** Rodrigo Sánchez Patiño, Aldo Miyashiro, André Silva, Marisol Aguirre, Daniela Feijoó, Sandra Vergara

**Exhibition date (in 2019):** 3/27 to 7/23

### 3. *En la Piel de Alicia*

**Production:** Del Barrio Producciones

**Direction:** Francisco Álvarez

**Script:** Rita Solf, Abel Enríquez, Tito Céliz

**Cast:** Ximena Palomino, Érika Villalobos, Bruno Odar, Nicolás Galindo, Andrés Vílchez, Luis José Ocampo

**Exhibition date (in 2019):** 7/23 to 11/13

### 4. *Los Vílchez*

**Production:** ProTV

**Direction:** Lucho Barrios, Miluska Rosas

**Original story:** Miguel Zuloaga

**Script:** Mariana Silvia Yrigoyen, Jesús Álvarez, David Carrillo, Italo Cordano

**Cast:** Patricia Portocarrero, Katerina D'Onofrio, Mayra Goñi, Sergio Paris, Gustavo Borjas, Ana Cecilia Natteri

**Exhibition date (in 2019):** 2/01 to 9/04

### 5. *Ojitos Hechiceros 2*

**Production:** Del Barrio Producciones

**Direction:** Francisco Álvarez, Aldo Salvini, Sandro Méndez

**Script:** Víctor Falcón, Eduardo Adrianzén, Claudia Sacha, Jimena Ortiz de Zevallos, Regina Limo, Rogger Vergara

**Cast:** Melissa Paredes, Sebastián Monteghirfo, Emilram Cossío, Rodrigo Sanchez-Patiño, Cielo Torres, Carolina Infante

**Exhibition date (in 2019):** 1/2 to 3/27

### 6. *Chapa tu Combi*

**Production:** Del Barrio Producciones

**Direction:** Francisco Álvarez

**Script:** Eduardo Adrianzén, Claudia Sacha, Jimena Ortíz de Zevallos, Rogger Vergara, Esteban Phillips, Danilo Vergara

**Cast:** Daniela Feijoó, Emanuel Soriano, Gustavo Borjas, Fiorella Díaz, Miguel Álvarez, Carolina Infante

**Exhibition date (in 2019):** 11/13 to 12/30

### 7. *El Último Bastión*

**Production:** TV Perú

**Direction:** Marco Moscoso

**Script:** Eduardo Adrianzén, María Luisa Adrianzén

**Cast:** Giovanni Arce, Rodrigo Palacios, Mayella Lloella, Mayra Nájjar, Sergio Galliani, Laly Goy-

zueta, Diego Lombardi

**Exhibition date (in 2019):** 4/22 to 6/07

### 8. *La Huaca de Cartón\**

**Production:** Canal Ipe

**Direction:** Renzo Amado

**Script:** Patricia Romero, Rodrigo Chávez, Renzo Amado

**Cast:** Andrea Alvarado, Gonzalo Molina

**Exhibition date (in 2019):** 4/27 to 7/17

\* It features four short-term children's shows, some of them broadcasted in previous years: *Martina y Rigoberto*, *Había Tal Vez*, *Viaje de Papel* and *¿Qué Es para Ti?*.

## PORTUGAL

### 1. *Nazaré*

**Production:** SP Televisão

**Direction:** Jorge Cardoso

**Script:** Sandra Santos

**Cast:** Carolina Loureiro, José Mata, Afonso Pimentel, Albano Jerónimo, Sandra Barata Belo, Inês Castel-Branco

**Exhibition date (in 2019):** 10/9 to 12/30

### 2. *Terra Brava*

**Production:** SP Televisão

**Direction:** Jorge Queiroga

**Script:** Inês Gomes

**Cast:** Mariana Monteiro, João Carré, Maria João Luís, Renato Go-

zinho, João Jesus, Fernando Luís

**Exhibition date (in 2019):** 10/28 to 12/30

### 3. *Golpe de Sorte*

**Production:** Coral Europa

**Direction:** Carlos Dante

**Script:** Vera Sacramento

**Cast:** Maria João Abreu, Ângelo Rodrigues, Dânia Neto, Jorge Corrula, Isabel Valadeiro, Manuela Maria, José Raposo, Rui Mendes

**Exhibition date (in 2019):** 5/27 to 11/10

### 4. *Valor da Vida*

**Production:** Plural Entertainment

**Direction:** Sérgio Graciano

**Script:** Maria João Costa

**Cast:** Rúben Gomes, Ana Sofia Martins, Dalila Carmo, Joaquim Horta, Isabel Valadeiro, Pedro Barroso, Joana de Verona, Daniela Melchior

**Exhibition date (in 2019):** 1/1 to 5/20

### 5. *Golpe de Sorte: um Conto de Natal*

**Production:** Coral Europa

**Direction:** Carlos Dante

**Script:** Vera Sacramento

**Cast:** Maria João Abreu, Ângelo Rodrigues, Dânia Neto, Jorge Corrula, Isabel Valadeiro, Manuela Maria, José Raposo, Rui Mendes

**Exhibition date (em 2019):** 12/21

### **6. *Alma e Coração***

**Production:** SP Televisão

**Direction:** Hugo Xavier

**Script:** Pedro Lopes

**Cast:** Cláudia Vieira, José Fidalgo, Soraia Chaves, Ricardo Pereira, Madalena Almeida, Renato Godinho, Margarida Carpinheiro, Manuel Cavaco

**Exhibition date (in 2019):** 1/2 to 10/11

### **7. *Amar Depois de Amar***

**Production:** Plural Entertainment

**Direction:** Manuel Amaro da Costa

**Script:** Helena Amaral

**Cast:** Pedro Lima, Dina Félix da Costa, Maria João Pinho, Filipe Vargas, Fernanda Serrano, Pedro Teixeira, Helena Isabel, Luís Esparteiro

**Exhibition date (in 2019):** 6/17 to 9/13

### **8. *A Teia***

**Production:** Plural Entertainment

**Direction:** António Borges Correia

**Script:** André Ramalho

**Cast:** Diogo Morgado, Mafalda Marafusta, Miguel Guilherme, Luís Esparteiro, São José Correia, Patrícia Tavares, Pedro Teixeira, Sofia Ribeiro

**Exhibition date (in 2019):** 1/1 to 6/17

### **9. *Na Corda Bamba***

**Production:** Plural Entertainment, TVI

**Direction:** Marcos Schechtman

**Script:** Rui Vilhena

**Cast:** Dalila Carmo, Pêpê Rapazote, Alexandra Lencastre, Margarida Vila-Nova, Maria João Bastos, António Capelo, Nuno Homem de Sá, Sofia Grillo

**Exhibition date (in 2019):** 9/15 to 12/30

### **10. *Prisioneira***

**Production:** Plural Entertainment

**Direction:** Sérgio Graciano

**Script:** Maria João Mira

**Cast:** Joana Ribeiro, Carloto Cotta, Kelly Bailey, Lourenço Ortigão, Paulo Pires, Joana Seixas, José Wallenstein, Paula Lobo Antunes

**Exhibition date (in 2019):** 5/21 to 12/30

## **SPAIN**

### **1. *La que se Avecina***

**Production:** Contubernio

**Direction:** Laura Cabellero, Miquel Albaladejo

**Script:** Alberto Caballero, Laura Caballero

**Cast:** Ricardo Arroyo, Pablo Chiappella, José Luis Gil, Macarena Gómez, Nacho Guerreros, Miren Ibarguren, Eva Isanta, Loles León

**Exhibition date (in 2019):** 9/24 to 6/12

### **2. *Cuéntame Cómo Pasó***

**Production:** Grupo Ganga Producciones, RTVE

**Direction:** Agustín Crespi, Antonio Cano

**Script:** Joaquín Oristell, Ignacio del Moral, Jacobo Delgado, Sonia Sánchez, Bárbara Alpuente

**Cast:** Ana Duato, Imanol Arias, María Galiana, Irene Visedo, Pablo Rivero, Carlos Cuevas, Paloma Bloyd, Ana Arias

**Exhibition date (in 2019):** 3/21 to 5/30

### 3. *La Caza, Montepellido*

**Production:** DLO Producciones

**Direction:** Álvaro Ron, Salvador García

**Script:** Agustín Martínez, Luis Moyá, Antonio Mercero

**Cast:** Megan Montaner, Francis Lorenzo, Alain Hernández, Pablo Derqui, Bea Segura, Patxi Freytez, Mar Sodupe, Jorge Bosch

**Exhibition date (in 2019):** 3/25 to 5/20

### 4. *Allí Abajo*

**Production:** Plano a Plano

**Direction:** César Benítez, Aitor Gabilondo (creators), Iñaki Mercero, Joaquín Masón, Jacobo Martos

**Script:** Óscar Terol, Olatz Arroyo, Marta Sánchez

**Cast:** María León, Jon Plazaola, Salva Reina, Mari Paz Sayago, David Arnaiz, Óscar Terol, Gorka Aguinagalde, Nerea Garmendia

**Exhibition date (in 2019):** 3/19 to 6/11

### 5. *Matadero*

**Production:** Diagonal TV

**Direction:** Daniel Martín Sáez de Parayuelo (creator), Jordi Frades, Joan Noguera

**Script:** Daniel Martín Sáez de Parayuelo, Laura Samiento, Fernando Navarro

**Cast:** Pepe Viyuela, Lucía Quintana, Ginés García-Millán, Miguel de Lira, Carmen Ruiz, Camila Viyuela, Filipe Duarte, Julio Pereira

**Exhibition date (in 2019):** 1/9 to 3/13

### 6. *Secretos de Estado*

**Production:** Media Producciones

**Direction:** Frank Ariza (creator)

**Script:** Frank Ariza, Ignasi Rubio, Ángela Obón

**Cast:** Miryam Gallego, Emmanuel Esparza, José Luis García Pérez, Jesús Castro, Michelle Calvó, Francisco Ortiz, Vicky Luengo, Patxi Freytez

**Exhibition date (in 2019):** 2/13 to 5/7

### 7. *Promesas de Arena*

**Production:** RTVE, Atlantia Media

**Direction:** Laura Garzón (creator), Joaquín Llamas, Manuel Estudillo

**Script:** Ignasi Rubio, Guadalupe Rilova

**Cast:** Andrea Duró, Daniel Grao, Francesco Arca, Blanca Portillo, Thaïs Blume, Marcel Borràs, Jairo Sánchez, Ayoub El Hilali

**Exhibition date (in 2019):** 11/11 to 12/16

### **8. *Estoy Vivo***

**Production:** Globomedia

**Direction:** Daniel Écija (creator), Jesús Rodrigo, Luis Oliveros

**Script:** Daniel Écija, Andrés Martín, Guillermo Cisneros

**Cast:** Javier Gutiérrez, Alejo Sauras, Aitana Sánchez-Gijón, Felé Martínez, Alfonso Bassave, Jesús Castejón, Goizalde Núñez, Jan Cornet

**Exhibition date (in 2019):** 9/26 to 12/19

### **9. *La Otra Mirada***

**Production:** RTVE, Boomerang TV

**Direction:** Luis Santamaría, Fernando González Molina, Miguel del Arco

**Script:** Josep Cister Rubio, Jaime Vaca, María López Castaño

**Cast:** Macarena García, Patricia López-Arnáiz, Ana Wagener, Melina Matthews, Carla Campa, Lucía Díez, Begoña Vargas, Abril Montilla

**Exhibition date (in 2019):** 5/27 to 7/15

### **10. *Malaka***

**Production:** Globomedia

**Direction:** Marc Vigil, Carles Torrens, Chiqui Garabante

**Script:** Daniel Corpas, Samuel Pinazo, Jordi Calafi

**Cast:** Maggie Civantos, Salva

Reina, Vicente Romero, Alejandro Casaseca, Antonio Gil, Manuel Morón, Víctor Castilla, Emilio Palacios

**Exhibition date (in 2019):** 9/9 to 10/21

## **URUGUAY**

### **1. *El Otro Lado del Paraíso***

**Production:** Globo

**Direction:** Henrique Sauer, André Felipe Binder

**Script:** Walcyr Carrasco

**Cast:** Bianca Bin, Glória Pires, Marieta Severo, Sergio Guizé, Rafael Cardoso, Fernanda Montenegro, Thiago Fragoso, Grazi Masafra

**Exhibition date (in 2019):** 1/14 to 8/8

### **2. *Betty en Nueva York***

**Production:** Telemundo

**Direction:** Gustavo Loza, Ricardo Schwarz

**Script:** Sandra Velasco, Valentina Párraga

**Cast:** Elyfer Torres, Erick Elias, Amaranta Ruiz, Sabrina Seara, Sheyla Tadeo, Sylvia Saenz, Aarón Díaz, Jeirmarie Osorio.

**Exhibition date (in 2019):** 4/29 to 10/29

### **3. *Ojos sin Culpa***

**Production:** Globo

**Direction:** Mauro Mendonça Filho

**Script:** Gloria Perez

**Cast:** Bruno Gagliasso, Débora Falabella, Marcello Novaes, Luana Piovani

**Exhibition date (in 2019):** 2/20 to 3/21

#### 4. *El Rico y Lázaro*

**Production:** Rede Record de Televisão

**Direction:** Ajax Camacho, Regis Faria

**Script:** Paula Richard

**Cast:** Dudu Azevedo, Christine Fernandes, Igor Rickli, Milena Toscano, Lucinha Lins, Angelo Paes Leme, Samia Abreu, Giselle Batista

**Exhibition date (in 2019):** 1/1 to 2/26

#### 5. *Final Feliz*

**Production:** Globo

**Direction:** Fernando Meirelles

**Script:** Euclides Marinho

**Cast:** Maria Fernanda Candido, Enrique Diaz, Paolla Oliveira, Adriana Esteves, Joao Miguel

**Exhibition date (in 2019):** 3/26 to 4/4

#### 6. *Carceleros*

**Production:** Globo, Gullane, Spray Filmes

**Direction:** José Eduardo Belmonte

**Script:** Fernando Bonassi, Dennison Ramalho, Marçal Aquino

**Cast:** Rodrigo Lombardi, Othon Bastos, Mariana Nunes, Giovanna Ríspoli

**Exhibition date (in 2019):** 2/5 to 2/21

#### 7. *Pequeña Victoria*

**Production:** Oficina Burman

**Direction:** Miguel Colom, Diego Sánchez

**Script:** Daniel Burman, Erika Halvorsen

**Cast:** Julieta Díaz, Luciano Castro, Natalie Pérez, Inés Estévez, Mariana Genesisio Peña, Facundo Arana, Jorge Suárez, Alan Sabbagh

**Exhibition date (in 2019):** 9/18 to 12/19

#### 8. *Nuevo Sol*

**Production:** Globo

**Direction:** Carla Bohler, Noa Bressane, Deniis Carvalho, Maria de Médicis, Cristiano Marques

**Script:** Joao Emanuel Carneiro

**Cast:** Emilio Dantas, Deborah Secco, Giovanna Antonelli, Adriana Esteves, Chay Suede, Danilo Mesquita, Luisa Arraes, Arlete Salles

**Exhibition date (in 2019):** 8/12 to 12/30

#### 9. *Bajo Presión*

**Production:** Globo, Conspiração Filmes

**Direction:** Andrucha Waddington, Mini Kerty

**Script:** Jorge Furtado, Lucas Parizo

**Cast:** Julio Andrade, Marjorie Estiano, Stepan Necerssian, Ora

Figueredo, Bruno García

**Exhibition date (in 2019):** 1/15 to 1/31

### 10. *Verdades Ocultas*

**Production:** Mega

**Direction:** Felipe Arratia

**Script:** Carlos Oporto

**Cast:** Camila Hirane, Viviana Rodríguez, Matías Oviedo, Emilio Edwards, Renato Jofré, Rocío Toscano, Marcela Medel, María de los Ángeles García

**Exhibition date (in 2019):** 1/2 to 10/10

## VENEZUELA

### 1. *Loquito por Ti*

**Production:** Caracol Televisión

**Direction:** Nombre Guarnizo, Nombre Lizarralde

**Script:** Carlos Fernández Soto, Ana Fernanda Martínez

**Cast:** Mariana Gómez, Variel Sánchez, Sebastián Carvajal, Daniela Tapia, María Camila Giraldo

**Exhibition date (in 2019):** 1/2 to 4/22

### 2. *Mi Marido Tiene Más Familia*

**Production:** Televisa

**Direction:** Aurelio Ávila, Héctor Bonilla, Francisco Franco, Juan Pablo Blanco

**Script:** Héctor Forero López, Pablo Ferrer García-Travesí

**Cast:** Zuria Vega, Daniel Arenas, Diana Bracho, Silvia Pinal, Arath

de la Torre

**Exhibition date (in 2019):** 1/2 to 5/27

### 3. *La Patrona*

**Production:** Argos Comunicación for Telemundo

**Direction:** Carlos Villegas, Víctor Hugo Martínez, Víctor Herrera

**Script:** José Ignacio Cabrujas, Julio César Mármol, Valentina Párraga

**Cast:** Aracely Arámbula, Jorge Luis Pila, Christian Bach

**Exhibition date (in 2019):** 1/2 to 2/15

### 4. *Zumba Despierta tu Pasión*

**Production:** Fox Telecolombia for RCN Televisión

**Direction:** Germán Porras, Mónica Botero

**Script:** Guido Jácome

**Cast:** Julián Román, Luz Estrada, Alejandra Ávila, Omar Murillo, Fernando Solórzano

**Exhibition date (in 2019):** 8/21 to 12/30

### 5. *Esmeraldas*

**Production:** Caracol Televisión

**Direction:** Luis Alberto Restrepo, Juan Carlos Vásquez, Jorge Sandoval

**Script:** Yamile Daza, Mónica Palacios

**Cast:** Diego Vázquez, Nicolás Montero, Nicole Santamaría, Laura de León, Luis Fernando Montoya

**Exhibition date (in 2029):** 7/2 to 10/14

**6. *La Ley Secreta***

**Production:** Caracol Televisión

**Direction:** Andrés Beltrán, Carlos Mario Urrea, Mateo Stivelberg

**Script:** Jhonny Ortiz, Adriana Barreto

**Cast:** Viña Machado, Luna Baxter, Juana del Río, Valeria Galviz, Tommy Vásquez

**Exhibition date (in 2019):** 9/30 to 12/30

**7. *Cara Sucia***

**Production:** Venevisión

**Direction:** Gabriel Walfensao

**Script:** Inés Rodena, Carlos Romero

**Cast:** Sonya Smith, Guillermo Dávila, Niurka Acevedo, Eva Blanco, Julio Capote

**Exhibition date (in 2019):** 1/2 to 2/5

**8. *Yo no te Pido la Luna***

**Production:** Caracol Televisión

**Direction:** William González

**Script:** Mauricio Barreto, Andrés Huerta

**Cast:** Anasol, Ricardo Vélez, Ángela Vergara, Juan Pablo Shuk, María Cristina Pimiento

**Exhibition date (in 2019):** 7/23 to 12/30

**9. *Eva Luna***

**Production:** Venevisión Internacional, Univision Studios

**Direction:** Tito Rojas, María Eugenia Perera, Luis Alejandro Vélez

**Script:** Leonardo Padrón

**Cast:** Blanca Soto, Guy Ecker, Julián Gil, Vanessa Villela, Susana Dosamantes

**Exhibition date (in 2019):** 5/28 to 12/30

**10. *Los Querendones***

**Production:** Venevisión

**Direction:** Carlos Izquierdo

**Script:** Carlos Pérez

**Cast:** Fabiola Colmenares, Jorge Reyes, Crisol Carabal, Miguel de León

**Exhibition date (in 2019):** 1/2 to 1/21

**SOLO**  
editoração & design gráfico

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# OBITEL 2020

## Melodrama in Times of Streaming

The current Obitel Yearbook is the 14th volume of a series started in 2007. This year Obitel is comprised of ten national research groups that carried out an annual systematic monitoring of fiction programs broadcast on open TV in these countries. Obitel has been in existence for 15 years and follows a unified protocol, to which the analysis of fiction presented on video on demand (VoD) has also been added. The result is to provide a synchronous and diachronic overview of the transformations that the genres and formats of television fiction in Ibero-America undergo.

Nowadays, television as a cultural production and fictional phenomenon has found on the internet, streaming platforms and VoD the possibility of a different global mobility and circulation. It makes easier the identification of analogies and contrasts between productions of various origins. This range of possibilities is available to creators as well as to receivers, making possible new relationships in what Stuart Hall (1997) called the “circuit of culture”: consumption, production, regulation, representation and identity. As a syncretic genre, melodrama is open to the incorporation of new themes and identities, something that becomes stronger when it meets the seriality on streaming platforms.

For this yearbook, the countries that make up Obitel chose “melodrama in times of streaming” as the theme of the year. The aim is to identify, through the analysis of characters, themes and narrative plots of melodrama that are circulating on VoD platforms, as well as the particularities of the combinations of the melodramatic mode in various genres and cultural contexts in Ibero-American television fiction.