

IBERO-AMERICAN OBSERVATORY OF TELEVISION FICTION

OBITEL 2021

Ibero-American Television Fiction In Times Of Pandemic

general coordinator Maria Immacolata Vassallo de Lopes

editor Morella Alvarado Miquilena

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OF TELEVISION FICTION

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IN TIMES OF PANDEMIC

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PRESENTATION

The Ibero-American Observatory of Television Fiction (Obitel), founded in 2005, has as its main objective the annual monitoring and analysis of the production, distribution, audience and sociocultural repercussion of television fiction in Latin America and the Iberian Peninsula, through publications and seminars.

In 2021, the 15th Obitel Yearbook is published, resulting from an editorial effort funded entirely by the team of researchers who are part of Obitel.

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: A decade of television fiction in Ibero-America. Obitel's 10-year analysis (2007-2016).
- Obitel Yearbook 2018: Ibero-American television fiction on VoD platforms.
- Obitel Yearbook 2019: Internet television distribution models: actors, technologies, strategies. Coordinator of the edition: Charo Lacalle
- Obitel Yearbook 2020: Melodrama in times of streaming. Coordinator of the edition: Gabriela Gómez Rodríguez
- Obitel Yearbook 2021: Ibero-American television fiction in times of pandemic. Coordinator of the edition: Morella Alvarado.

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EDITOR'S NOTE

This 2021 Obitel Yearbook is published thanks to crowdfunding carried out by the groups of researchers that make up the Ibero-American Observatory of Television Fiction (Obitel). Its publication is in digital format in three languages: Portuguese/Spanish and 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, with Editora Globo imprint, Brazil;
- Obitel Yearbook 2009, published in Spanish by the European Children's Television Observatory (EITO), 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, published by Globo Universidade / Editora Sulina in Portuguese/Spanish and in English in digital format;
- Obitel Yearbook 2018, published by Globo Universidade / Editora Sulina in Portuguese/Spanish and in English in digital format;
- Obitel Yearbook 2019, published by Globo Universidade / Editora Sulina in Portuguese/Spanish and in English in digital format;
- Obitel Yearbook 2020, published by Globo Universidade / Editora Sulina in Portuguese/Spanish and in English in digital format;
- Obitel Yearbook 2021, published by Pontificia Universidad Católica de Chile / Universidad Central de Venezuela in Portuguese/Spanish and in English in digital format.

Since its foundation 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 coincide in a series of policies going from production to exchange and differentiated media, artistic, cultural and commercial creation.

Therefore, in view of the formation of an important geopolitical and cultural reference area, Obitel carries out not only the quantitative register of the production of fiction programs in the countries belonging to the countries@network, but also the analysis of trends in programming, Open TV reception and analysis of 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 analyzes 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 analyzes, which are rarely achieved in the scope of research project.

For all the above, in the 15 years of Obitel, the general coordinators and coordinators of each country that are members 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 the intervention of that knowledge in the promotion of a fiction that is increasingly the narratives of our Ibero-American nations.

Here, we reiterate our recognition of the collaboration received from the Kantar Ibope Media institutes (Brazil, Argentina, Chile, Colombia, Peru, Uruguay), Nielsen Ibope Mexico (Mexico), GfK / Caem e Markttest (Portugal), Barlovento Comunicación and Kantar Media (Spain) and Nielsen Media Research (United States).

We also emphasize our gratitude to all universities and research centers in the Obitel countries, for the support and collaboration given to their national teams.

Finally, Obitel researchers would like to express deep gratitude to Globo for the support given in 14 years of partnership, for its decisive participation in the publication of yearbooks and seminars, which was marked by respect, seriousness and recognition of the joint work Obitel/GU-Globo.

METHODOLOGICAL NOTE

The IBERO-AMERICAN OBSERVATORY OF TELEVISION FICTION, established as Obitel, since its foundation in 2005, has been developed as an intercontinental project in the Ibero-American region, including Latin American and Iberian countries and the Hispanic population of the United States. At this time, it is still considered important to speak of an Ibero-American sphere due to the growing interest of different countries in the region to create policies of media, artistic, cultural creation and commercial production and exchange, as well as differentiated creation, which could collaborate to constitute an important area of geopolitical and cultural reference. The studies that Obitel carries out covers at least five dimensions of this vast object of analysis: production, exhibition, consumption, commercialization and thematic narratives. 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 cellphones, 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. Since then, Video on Demand Services (SVOD) have been occupying us more and more due to the importance of the so-called “streaming war”

The methodological activities carried out for this 2021 Yearbook were essentially the following:

- 1) Systematic monitoring of fiction programs broadcasted on Open TV channels of the 11 countries that took part in this edition of the Obitel Yearbook;
- 2) Production of comparable quantitative data between these countries: schedules, premiere programs, number of chapters, audience profile, main fictional themes;
- 3) Identification of diverse and bilateral flows of genres and fiction formats, which converge into the “ten most viewed fiction titles”, their central themes, rating and share;
- 4) Trend analysis about the narrative and themed 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 themed content;
- 5) Systematic monitoring of fictional programs broadcast on Pay Television (PayTV) in the 11 countries that participated in this edition of the Obitel Yearbook;

- 6) 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;
- 7) Suggestion of a topic of study that led the 11 teams to a theoretical and methodological articulation around it, and the result of which intends to be a particular contribution of Obitel to television fiction studies, under the title of “Theme of the year”;
- 8) Introduction of new topics of discussion based on a protocol with a systematic monitoring of television fiction distributed in the internet, basically SVOD and streaming platforms.
- 9) Publication of the results of the systematic monitoring in the form of a Yearbook, with special attention to a particular theme. The “Theme of the year” for this 2021 Yearbook is “Ibero-American Television Fiction in times of pandemic”.

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

The primary 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 Markttest (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 news-

paper 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.

STRUCTURE OF THE YEARBOOK

The structure of this Yearbook is divided into three parts.

The **first part** 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 trends and changes, as well the theme of the year.

In the **second part**, there are 11 chapters (one for each country), with an internal structure made by **six sections** fixed in the Yearbook, 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-American 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**, since 2019, which includes the description of this system in each country, the benefits of VoD systems and the analysis of national and Ibero-American fictions on national and international platforms.

4) **Fiction and audience participation in digital environments:**

Open TV, VoD and transmedia expressions on social networks presents and exemplifies the total offer that television gives to their audiences, so that they can watch their productions on the Internet. The interest lies in the analysis of the types of conduct that audiences adopt, by themselves, to view, consume and participate on pages and websites about their preferred fictions. It is fundamentally about understanding in depth the transmedia proposals from the multiple platforms.

5) **Highlights of the year:** the most important products, not only in terms of audience (rating), but also in terms of the sociocultural impact or the innovation they have brought to the television industry or to the market.

6) **Theme of the year:** always presents emerging and provoking themes for fiction research. The theme for the year 2021 is “Ibero-American television fiction in times of pandemic”, which seeks to analyze, in an unprecedented way, the impacts and repercussions of the Covid-19 pandemic on the television industry of each country and, mainly, to identify the multiple strategies cre-

ated and adopted for the retaking of fictional productions after the lockdown in the early 2020s.

The **third part** of the Yearbook is an **Appendix** with the technical files about the top ten television fiction of the year in Orbitel countries with the technical information of these productions.

PART I

Fiction In The Iberoamerican Area In 2020

Comparative Synthesis Regarding The Iberoamerican Countries In 2020

**Fiction in Covid-19 time: a break in production
that left room for streaming.**

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For the first time since this yearbook began, all Obitel member countries were affected by the same phenomenon: the COVID-19 pandemic. The disease caused by the virus SARS COV-2, detected in China by the end of 2019, attained characteristics of a pandemic in less than three months. From March 2020, a confinement period started in world's major cities, affecting not just economic activity but also everyday life of the people, who had to remain home for weeks and even months. Work, education, videoconferences, shopping and even medical consultations moved to internet. Audiovisual fiction became a memory of the normality lost, as well as an escape from the reality featured on the news and from the global campaigns promoting the use of face masks, physical distance, limited capacity and vaccination programs. 2020 turned into a peculiar year since fiction production in Obitel member countries was minimized, but this was not yet the case for consumption. And as soon

1 Associated professors of the School of Communications at the Pontifical Catholic University of Chile.

as the confinement was loosened, production had to adapt itself to pandemic protocols and also to address emerging issues related to the new life context. The analysis of 2020 data presented in this report shows the consolidation of a change process in television, emphasizing the relevance of streaming as a distribution technology of exclusive products as well as contents produced by open television. These changes were maybe accelerated by the pandemic but they may become permanent.

1. Obitel countries and Open TV in 2020

The open television landscape in Ibero-American countries shows a great diversity of situations due to: (a) the different importance and role of public television; (b) the level of implementation of digital terrestrial television; and (c) the relevance of each country regional signal. Table 1 shows a reduced but representative version of that diversity. Only national wide networks and their main signals, in those cases where digital terrestrial television has been fully implemented, can be appreciated.

Table 1. National open television networks in Obitel member countries in 2020.

Country	Private TV	Public TV	Public TV audience share among main national signals (%)
Argentina	5	1	3,2
Brazil	5	2	0,9
Chile	6	1	18,9
Colombia	3	2	10,2
Spain	4	2	23,9
Hispanic US	5	0	0,0
Mexico	9	4	-
Peru	5	1	5,3
Portugal	2	5	27,4
Uruguay	3	2	-
Venezuela	9	13	-

Source: *Obitel*

The relevance of what is not shown in table 1 varies from one country to another. In addition to what has already been indicated, open television coexists in all the countries with pay television and streaming. But there are two cases related to what has not been mentioned that deserve a special reference. The first one is the Hispanic US where the bulk of television offer corresponds to the Anglophone, which obviously is also available to Hispanic audiences. The other relevant case is Spain where, besides secondary signals, autonomous regional television channels play an important role in their region and, in some cases, have a significant capacity to produce high standard fiction. These channels are not included in table 1, but their productions are indeed contained in tables showing Spanish fiction production and exhibition.

As it can be observed in table 1, the underlying rule shows that private television is the dominant open signal and public TV is secondary, but there are some exceptions. The most notorious case is Spain where *La 1* is the third most-watched signal in a very competitive market. The case of Portugal is different since the market is less divided, and channels *RTP1* and *RTP2* together represent less than the second of the two private players. The third remarkable case is TVN from Chile that, still competing with a greater number of players, achieved a higher turnout. Considering its contents and its funding, it is not exaggerated to say that this public channel acts like a private one, but its owner is the Chilean State. Finally, it was striking to see the large numbers of public channels available in Venezuela, despite their social insignificance. In 2020, Venezuela was unable to conduct the audience measurement, because the only rating company left the country and it was not replaced by any other. However, figures show that in 2019 the three first private channels concentrated 80% of the audience, and the other 20% was distributed among 19 public and private channels.

Table 2. Fiction's share in TV programming as a percentage of screen time.

	2016	2017	2018	2019	2020
Argentina	18,4	16,3	14,2	7,2	24,3
Brazil	14	13,9	13,6	11,8	12,9
Chile	34,3	29,7	25,4	27	24,2
Colombia	26,7	20,5	21,4	33,9	32,8
Spain	41,4	41,3	41,5	42,7	42,3
Hispanic US	48,9	44,8	44,1	40,7	42,2
Mexico	14,8	15,2	16,2	15,9	12
Peru	37,3	37,9	36,5	32,8	31,3
Portugal	23,6	24,7	24,4	19,9	20,8
Uruguay	25,9	26,4	26,8	25,7	20,4
Venezuela	-	15,6	-	22,1	-

Source: Obitel

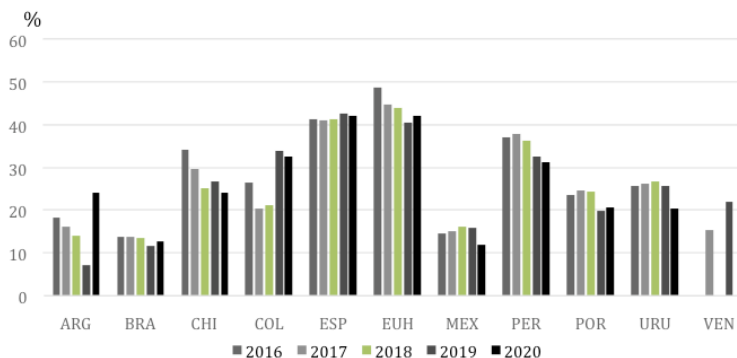
Table 2 shows the evolution of fiction's share in total open television programming during the last five years. It represents the entire fiction and not just the Ibero-American one, as it will be seen in sections below. Despite cross-country variations, it can be said that Ibero-American fiction is the dominant on open television in these countries.

Excepting Argentina and Venezuela, which have local situations that go beyond television matters, abrupt changes in figures demonstrating fiction participation in TV programming have not been observed. Unlike pay television and streaming, an alignment between TV time and type of contents to be consumed in certain time has been verified on open television. Fiction consumption, as well as other television genres, tends to be routine and to be coupled to activities of daily living favoring a certain inertia in channels' programming strategies.

However, inertia does not mean the absence of changes but their slowness. Chart 1 contains the data from previous table. By adjusting a linear trend in data from each country (except Venezuela), it can be observed that in seven out of ten countries fiction participation has decreased, while in Spain it has remained the same, and some

abrupt changes have occurred in Argentina and Colombia, but they are more related to some kind of structural adjustment than to evolution.

Chart 1. Fiction time's share in open television



Source: Obitel

Chart 1 also demonstrates a second relevant fact. While in Spain and the US Hispanic fiction's share reached 42% of programming time, in Brazil and Mexico just reached 13% and 12%, respectively. This represents less than a half of the average share obtained in the rest of Obitel countries. Excepting Brazil and Mexico, average fiction's share is around 30% of programming time. It is paradoxical that, according to table 3, these two countries along with Spain exhibited a larger volume of TV fiction premiere during the two years before the anomalous 2020.

The health crisis resulting from the COVID-19 pandemic changed people's daily life from all the Obitel member countries. As the Uruguay report indicates, the need to be informed about the disease progression and the actions of the authorities to control it made TV audiences, in different moments of 2020, to be more attentive to news and life press conferences from their respective governments, increas-

ing rating during those periods. Peru also reports the same phenomenon, but also mentions a sevenfold increase of education TV programs. Argentina experience tells, according to some consultancies, that the demand of more cheerful TV contents for the infantile-juvenile audience, who spent more time at home due to the pandemic, increased. Colombia reports a decrease in the production of fiction, and the lack of new titles was compensated by series and *telenovelas* taken from the truck of memories.

2. Television fiction in Obitel countries in 2020.

The second section of each country chapter informs about Ibero-American TV fiction premiere broadcast in each of them. TV fiction premiere, in addition to presenting fiction locally produced and broadcast, represents an indirect measure of each country productive capacity, and when it refers to other countries fiction, gives an idea of fiction trade flows.

Table 3 has been made based on tables 2 from each 2020 national chapter and on the four previous yearbooks, and it considers exclusively national fiction broadcast and co-productions in which each country has participated.

Table 3. Offer of hours of national fiction premiere on open television (2016-2020)².

Year	ARG	BRA	CHI	COL	ESP	EUH	MEX	PER	POR	URU	VEN
2016	584	1435	1080	1121	1806	1059	706	666	1232	9	576
2017	756	1431	931	1048	1977	1000	1545	553	1293	11	522
2018	526	1299	722	520	1742	1171	2070	621	755	16	-
2019	376	1307	747	733	1451	1071	1330	560	1025	3	35
2020	62	416	274	271	1217	661	906	442	795	47	3

Source: *Obitel*

2 Fort the US, only Hispanic population is considered for this study.

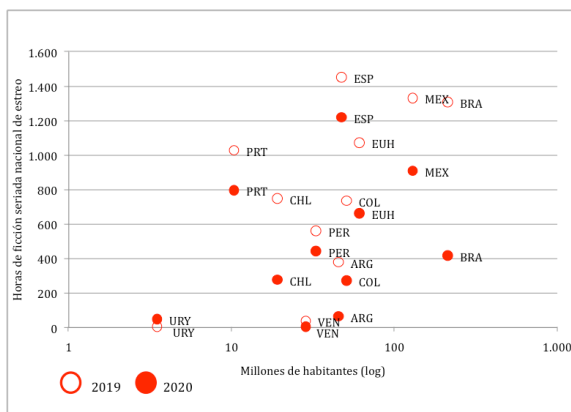
Comparison with data from the four previous years evidences the drastic production plunge in 2020 as a consequence of confinements and other restrictions due to COVID-19. Total Obitel fiction premiere dropped by 41% in contrast with 2019, and in some cases the production decline reached 80% and 90%. In absolute terms, the largest drop occurred in Brazil, which 68% of decline represented 891 hours less of fiction. The only exception was Uruguay that had an explosive increase, but from a very low baseline.

2020 anomaly should not hide a more structural issue. As it can be observed, total Obitel production decline of 41% need to be aggregated to the accumulated fall of 22% experimented during the two years before the pandemic. This setback in TV fiction production for open television should not mean a decline in productive capacity. The volume of production premiere on VOD, shown further down, suggests that, at least, one percentage of the phenomenon corresponds to a displacement from one window display to another.

Another interpretation of table 3 gives a picture of the competition level among member countries. A common feature in Obitel countries is their capacity as purchasers and, with varying degrees of success, as sellers in the same Ibero-American market. If all these countries follow a same pattern of production and local exhibition as a pre-sale phase, therefore table 3 can be considered as a measure of future volume of original production that will be offered in TV fiction market. A significant fact is that, excepting Mexico/Colombia and Mexico/Portugal, correlations between pair of countries are positive. A common possible interpretation is that local production is not motivated by exports, but by local conditions in each country, and these can usually be affected by common economic factors. There are two exceptions to this rule because the US is a significant market for Mexican and Colombian productions, and so is Brazil to Mexico and Portugal.

Chart 2 considers the two last years of table 3 in order to highlight the drop of local fiction premiere exhibition, and it cross-checks it with population from each country.

Chart 2. Fiction productive capacity on open television



Source: *Obitel, World Bank, US Census Bureau*³

Taking 2019 as the reference year, the Obitel country showing the highest production of TV fiction hours per capita was, with obvious supremacy, Portugal with 99 hours per million people, followed by Chile and Spain with 39 and 31 hours, respectively. This simple indicator helps to compare levels of production between small countries, such as Uruguay with 3,5 million people, and big countries such as Brazil with 213 million people.

However, the size of population is not enough to explain the different volumes of production. A better approach can be obtained by using a simple model with an adequate adjustment⁴, consisting in

3 $R^2=0.92$; $R^2_{ajust}=0.77$; $F_{0.05}$. A more elaborate model should include, at least, variables as advertising investment in television industry and production in other “display windows” and productions from other platforms.

4 Venezuela and the US were not included for not having data equivalent to what it would be the GDP of a specific population group.

a simple linear regression of population and GDP per capital acting as independent variables. In this case, results suggest that in 2019 Argentina, Brazil and Uruguay presented a production of fiction hours below expectations, while productions from Spain, Colombia and Peru were above the predicted by the model¹⁴. It would have no sense to apply the same model to 2020, because the reasons for the general decline of production, as previously mentioned, differ from those from 2019.

Table 4 has also been built based on tables 2 from each national chapter. In this opportunity, the hours of TV fiction premiere from each country were put together in a table to obtain a map of export flows among countries. This is about fiction released in a specific country that could have been previously exhibited in other places.

Mexico, Brazil and Colombia, in this order, are shown as countries with a robust exporting industry. Hispanic US is located far below in this list, and the rest of the countries has small volumes. In an opposite way, Peru is the major importer, not just in volume but also in the variety of countries where the fiction consumed by its population comes from. In terms of diversity but with half of the volume, this country is followed by Uruguay and Chile on the classification.

Table 4. Ibero-American fiction premiere exhibited in each country during 2020.

		Exhibition country											
		Hours	ARG	BRA	CHI	COL	ESP	EUH	MEX	PER	POR	URU	VEN
Country of origin	ARG	-	0	0	0	0	0	0	119	0	17	69	204
	BRA	179	-	350	0	23	76	460	112	253	364	0	1.817
	CHI	0	0	-	0	0	0	0	138	0	37	0	175
	COL	153	0	31	-	32	154	371	287	0	2	449	1.479
	SPA	1	0	3	0	-	0	10	2	0	17	0	34
	HUS	23	134	8	0	79	-	44	272	0	0	1	560
	MEX	0	147	328	117	206	1.013	-	570	0	55	148	2.583
	PER	0	0	0	0	0	0	0	-	0	0	0	0
	POR	0	141	0	0	0	0	0	0	-	0	0	141
	URU	0	0	0	0	0	0	0	0	0	-	0	0
	VEN	0	0	0	0	0	0	0	0	0	0	-	0
	Total	356	421	720	117	339	1.243	885	1.500	253	493	666	6.993

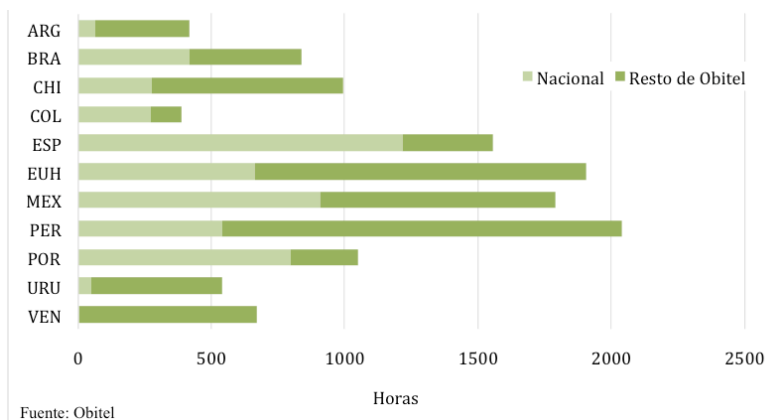
Source: *Obitel*

At the other end, there are countries such as Colombia and Portugal that import all the TV fiction from one country: Mexico in the case of Colombia and Brazil in the case of Portugal.

Chart 3 is the result of combining tables 3 and 4, and it shows the volume of TV fiction premiere exhibited in each country and to what extent local TV fiction coexists with TV fiction from the rest of Ibero-America.

Regarding the major export countries, Brazil and Mexico are also large importers, and their local fiction represent 50% of what have been exhibited. This is not the case of Colombia that imports just 30% of the exhibits. From a fiction autarky point of view, Spain and Portugal just import 22% and 24%, respectively, of what have been exhibited. At the opposite end, Argentina, Uruguay and Venezuela depend in 85%, 90% and 99%, respectively, on fiction imported from other countries.

Chart 3. Ibero-American fiction premiere exhibited during 2020.



Source: *Obitel*

Tables 5 and 6 disaggregate TV fiction premiere exhibited in each country according to their formats. Table 5 does so by showing the quantity of titles in each format, while table 6 shows the percentage distribution of hours exhibited according to each format in every country.

Considering the number of titles, *telenovelas* and series are the dominant formats with 69 and 64 titles, respectively, out of a total of 162. But when the quantity of hours produced is considered, *telenovela* presents itself as the hegemonic format in the region, reaching a participation of 76% of exhibited time.

Table 5. Number of national titles by fiction premiere formats during 2020.

Format	ARG	BRA	CHI	COL	SPA	HUS	MEX	PER	POR	URU	VEN	Total
Telenovela	1	6	5	25	7	7	5	7	6	0	0	69
Series	0	9	6	12	20	1	5	1	8	1	1	64
Miniseries	4	1	1	0	4	0	0	2	3	0	0	15
Telefilm	0	0	0	0	0	0	0	0	1	0	0	1
Unitary	0	2	0	0	0	1	3	0	1	0	0	7
Docudrama	0	0	0	0	0	0	0	0	0	0	0	0
Others	0	5	0	0	0	0	0	1	0	0	0	6
Total	5	23	12	37	31	9	13	11	19	1	1	162

Source: *Obitel*

Table 6. Time by national fiction premiere format exhibited during 2020

Format	ARG	BRA	CHI	COL	SPA	HUS	MEX	PER	POR	URU	VEN	Total
Telenovela	57%	82%	82%	75%	85%	93%	47%	78%	89%	-	-	76%
Series	-	8%	16%	25%	14%	3%	28%	5%	9%	100%	100%	19%
Miniseries	43%	2%	2%	-	1%	-	-	2%	1%	-	-	1%
Telefilm	-	-	-	-	-	-	-	-	0,2%	-	-	0,02%
Unitary	-	4%	-	-	-	4%	25%	-	0,1%	-	-	3%
Docudrama	-	-	-	-	-	-	-	-	-	-	-	-
Others	-	8%	-	-	-	-	-	15%	-	-	-	1%

Source: *Obitel*

3. VoD Monitoring of 2020

The steady growth of streaming as a format for VOD content distribution continued despite de COVID-19 pandemic. In fact, the confinement experimented by the word population during half of 2020 produced a significant increase in consumption of this platform on demand, which was also boosted by the introduction of new, national and global, players in the sector. However, restrictions resulting from the pandemic impacted the audiovisual production, even though some titles, concentrated in few countries, were produced for VOD.

Table 7 of this section is developed on the basis of tables 6 from each country chapter. They identify all the national and Ibero-American titles of TV fiction premiere available in each country in different VOD platforms, but table 7 just considers local titles and co-productions in which the country concerned takes part.

Table 7. Number of serial fiction titles released in each country in different platforms during 2020. Co-productions including the concerned country in brackets.

Platform	ARG	BRA	CHI	COL	SPA	HUS*	MEX	PER	POR	URU	VEN	Total
Netflix	3	7 (2)		5	8	3	6					32 (2)
Prime Video	(1)	5	2 (2)		9 (1)		4				1	21 (4)
Globo Play		19 (3)										19 (3)
Movistar	1				10 (1)			2				13 (1)
Atresplayer					7							7
Claro							6					6
BoxBrazil Play		5 (1)										5 (1)
Cablevisión Flow	5 (1)											5 (1)
HBO Go		1			3				(1)			4 (1)
Cont.ar	3											3
OPTO									3			3
Caracol Play				2								2
Orange TV					2 (1)							2 (1)
RTP Play									2			2
AméricaTV Go							1					1
Blim							1					1
Fox España					1							1
TNE					1							1
UN3TV										1 (1)		1 (1)
Total	12 (2)	37 (6)	2 (2)	7	41 (3)	3	18	2	5 (1)	1 (1)	1	129 (15)

Source: *Obitel*

**Hispanic US only includes productions in Spanish made within the US. But, if standard definition of origin is applied to the producer companies, all titles produced by Netflix, Prime Video and other American platforms may be considered US productions or co-productions.*

In 2020, Spain and Brazil stand out as the main producers of series for streaming platforms, as they accumulate 41 and 37 titles, respectively, without considering co-productions. They already held these positions in 2019 with 29 and 23 titles each, but in 2020 they kept growing and overcame Mexico, which maintained the same 18 titles obtained in 2019, a figure very similar to 16 titles produced in 2018.

Spain shows the higher rate of growth, and over the last three years without considering co-productions, increased the number of titles from 16 in 2018 to 41 in 2020. This growth cannot only be explained by the installation of the first Netflix production center in Europe in 2019, since this company only represented the fifth part of Spanish premiere.

Excluding Chile and Hispanic US from the total, in order to use only comparable figures at the aggregate level from the three previous periods and without considering co-productions, the growth of productions for platforms in Obitel market is significant, and it does not seem to have stopped during the pandemic: 69 titles in 2018, 101 in 2019 and 124 in 2020. It will be necessary to wait until 2022 to know if the difficulties experienced during the pandemic in 2020 and 2021 will be reflected in number of titles to be release that year.

In section two, a downward trend in the number of hours of TV fiction for open television was noted. Although the number of hours produced for television responds mainly to *telenovelas*, and the increase of VOD series does not seem to compensate that fall.

Using the information about time and episodes from open television corresponding to 2020 as a reference, which is the only

data available, it can be said that in the Obitel area a *telenovela* is 3,7 times the number of broadcast hours involved in a series. Nevertheless, variations among countries are high and range from 1,7 times in Mexico, whose series as well as Colombian tend to be longer, to 17,5 times in Spain, which has longer telenovelas and shorter series than the region average.

Table 7 shows 19 streaming platforms that have released fiction contents originated in one or more Obitel countries. Two thirds of titles released correspond to four of those platforms: two American platforms (Netflix and Prime Video), one Brazilian (Globo Play) and one Spanish (Movistar). The rest is represented by platforms of different sizes that have released between seven and four titles.

On the other hand, most of the streaming platforms, 15 out of 19, produce only in one country. Three out of the four already mentioned (Netflix, Prime Video and Movistar) and HBO Go are exceptions. Despite their big size, companies such as Globo Play or Claro produce in a single market.

To produce fiction in one country means to compete for financing, talents and creative resources. In this sense, a more intense competition is observed in countries showing a higher level of production. In Spain, which produced 41 titles plus three co-productions, production is distributed in eight platforms. Brazil, Mexico and Argentina, countries ranked after Spain in terms of number of titles, have, each one, five platforms. For the rest of the countries the number of streaming platforms producing fiction is lower.

4. Fictions analysis: Open TV, VoD and transmedia expressions on social networks

The COVID-19 pandemic affected the fiction market to the point that a production had to be suspended in Argentina for not being able to continue filming, and the production company had to start a process of downsizing. Brazil experimented a similar situation, and five out of the ten titles that produced the higher interactions in social medias were reruns of *telenovelas*, such as *Avenida Brasil*, *Fina Estampa* and *La Fuerza del Querer*. Peru experimented, even if the figures are low, an increase of unedited titles and reruns, which totaled 153 during 2020. 11 of them were national inedited productions belonging to the same TV channel. This is not the case of Spain that showed a high diversity of VOD titles, and 79,1% of this fiction was released in 2020 for the first time. A novelty in this market is the start of the first AVOD (*Advertising-Based Video on Demand*), a new streaming service without registration and for free.

The impact of confinement on audiovisual consumption can also be observed in VOD. Since people had to stay home and schools had to close, initiatives of remote education found an ally in television for delivering their contents. In Uruguay, *A C+ Maratón Transmedia* was created, by the conduction of a young lady youtuber and a very known young gamer, to support families and students, especially young people. In Portugal, channel RTP Memoria, dedicated to broadcast classic contents and files, was restructured for broadcasting distance learning with a strong online component.

One of the identified trends in some countries was the use of several platforms to access audiovisual productions, in particular, YouTube and social medias. In Chile, public television created a channel on a platform called *Telenovelas y series / TVN*; however, it operates

more like a repository than an instance for interaction and transmedia, and it is not integrated to the channel content strategy. In Peru, the multiplatform approach was assumed as a complement to open television, as it is mentioned in this country report in section about the America TVGO case, the most important VOD platform in Peru.

TV channels and VOD platforms are using their accounts on social networks such as Twitter and Facebook to promote their titles regionally (Latin America) and locally (country). This is the case of Mexico, where Netflix local account in Facebook, @Netflixmx, broke the 73 million followers. In Venezuela, TV channels, like Televen, activated their Instagram accounts to promote their titles by using flyers. But, the user's feedback consisted in giving their opinion about the programming and in highlighting signal reception problems, reinforcing the messages with sad emoji.

In Peru, telenovela *Mi Vida sin Ti* (2020) raised a number of debates and discussions in social medias, in which actors and actress participated to sensitize people about gender violence that has been far from diminishing during the COVID-19 pandemic. Instagram was also used as a space for interacting with the audience, as it is the case of fiction series *Si Solo Si* from the Argentine public television, whose actors performed several lives relating to disability. For its part, the Spanish series #*Luimelia* took advantages of the use of the hashtag with its name to promote chats and threads in Twitter, in order to get closer to the target audience. This is a spinoff from the series *Amar Es Para Siempre*, about two characters, Luisita and Amelia, whose mutual love is developing in chapters of no more than 10 minutes. The blending of names to create a title is something also observed in the Brazilian *fanfiction Malhação-Viva a Diferença*, which is also about a lesbian couple, *Lica y Samantha*, known on social medias as "Limantha". The same phenomenon can be detected in *100 Días para Enamorarnos* (Telemundo, USA), where two support characters, Ale,

a transgender boy in transition to become Alex, and Lucia have an affair. As it happened to #Luimelia and Limantha, comments about Lucia and Ale flooded social networks, and even some groups supporting this romance #Luciale o #Lucialex were created in Facebook. Moreover, the use of stickers on instant messengers was also observed, especially in Brazil, where contents generated by users (User Generated Content) were largely memes related to reruns of *telenovelas*. Spanish series *La Valla*, addressing a dystopic issue, used a content transmedia strategy, and even developed a microsite including exclusive content, such as a clandestine radio and phone videos from year 2045, when the series is set in. *La Valla* is a production from Atresmedia, exhibited in its VOD platform, Netflix, and then on the open TV channel, Antena 3.

But fiction was not the only content under the auspices of international VOD platforms and national televisions. Taking advantages of the confinement and the closure of theaters, night clubs and auditoriums, lives were offered under the “exclusive contents” format. In this sense, Portugal created RTP Palco, a VOD offer for shows, theater, music and dance. But YouTube became the most versatile platform, and this service was even used by some independent producer companies that produced web series, for instance the *Aisla2* from Colombia. In Mexico, this online space was used to address topics not covered by open television, such as gender diversity and LGBTTTQI+ community. For that purpose, programs like *La Más Draga*, *La Bastarda* and *Ana, La Chica Bolera* were created. The same happened in Brazil where independent productions like *Esconderijo*, *The Stripper*, *Contos Latentes* and *Magenta e Ellas*, among others, addressed the same thematic.

5. Highlights of the year

Open television programming in most of the Obitel member countries was disrupted by the health emergency. Daily reports about contagious, percentage of samples testing positive for COVID-19 and the untimely passing of hundreds (and in some periods thousands) of people had a guaranteed space on screen.

Added to all this were the talk shows, analysis, scientific divulgating programs, political debates, news and magazines addressing diverse aspects of the pandemic at the individual, familiar, social, national and international levels, focusing on different groups of people (kids, students, parents, elderly, technical and medical staff, etc.). This fact was highlighted by the Argentina team presenting how, in the distribution of programming hours, informative content was imposed over entertainment, series and *telenovelas*. But, regarding the raking, public choice in that country is the opposite, and comedy, entertainment and telenovela stand out. In any case, there is no doubt that Ibero-American TV audiovisual content was sieved through COVID-19, although, as we shall see below, this no fiction relevance could not be reflected in audiovisual fiction, whose production was deceased by health restrictions.

This is how reruns prevailed in TV programming during the first half of 2020. Those productions, made in pre-pandemic times, represented a very different reality from what people were experimented during the harder moments of COVID-19, evidencing a big difference between what has been shown and what has been actually lived. This is maybe why reruns selection, in some cases, prioritized relaxation, humor and the development of simple issues, almost as a scape of reality. Indeed, this fact was reported by Colombia; for instance, *Pedro el Escamoso* and *Pasión de Gavilanes* became a space for entertainment and family reunion.

Home confinement transformed houses and apartments into multi target places for parents to work and for kids virtually attend school, besides all the housework involved in being 24 hour and seven days a week lockdown. In some region countries, tele-education initiatives were proposed, some of them based on official school curricula boosted by education authorities, and others had no curricular programming but offered cross-cutting education objectives. One of the main examples is the initiative from Peru government, *Aprendo en Casa*, designed for school children to have distance learning, even though broadcasters just offered one or two hours of their programming. *TV Educa Chile* was a different case, and it is considered a unique experience in which all private open television channels and the public signal agreed to broadcast, in their second digital channel from the assigned multiplex, the same programming and the same educative contents for children. Likewise, the signal was also broadcast by the main cable operators, satellites, IPTV and channels 'sites. The main provider of this type of contents was the National Council for Chilean Television (CNTV), but other channels, with some files related to this subject, also participated. CNTV included a particular slot for official curricular content generated by the Chilean Ministry of Education.

In this context where audiovisual content consumption in confinement seems to respond to classic TV targets, such as inform, entertain and educate, the Portuguese team choose the development of a streaming strategy by open television channels as the element to be highlighted from 2020. Beyond affecting television, new platforms boost production, allow audiences to focus on content and give access to a variety of programs. As the Chilean public channel, TVN, that created an online channel to broadcast their own telenovelas; Portuguese public channel, RTP, uses its platform RTP Play like a repository and file, even though it is not the only streaming experience in Portugal. Spain demonstrated that it could have a large number of content pre-

mieres, domestically produced and distributed as part of different VOD offers available. There were 44 fiction premieres on these platforms, and some of them cover virtually all genres.

As well as Chile started 2020 with the continuation of social unrest and massive protests in main country cities initiated in October of the previous year, the United States also had social intense moments. Apart from the high number of contagious that this country had during the pandemic, along with Brazil and India, the electoral contest between the former president Donald Trump and his contender Joe Biden, from the Democratic Party, extreme population's positions to existential levels. The murder of George Floyd by the police gave an impetus to the *Black Lives Matter* movement, with demonstrations all over the country. This is how TV networks, Univision and Telemundo included, had a special coverage of the presidential election in this context of social protests, in addition to the COVID-19 news which had already started to be part of TV programming.

Other regrettable reality from 2020 was the gender violence that gave diverse women's collective movement impetus to stop aggression against women, girls and adolescent. Both, Peru and Mexico reported details of this reality. In fact, the Mexican team informs about an increment of 39% in attention and support requests to the Refuges National Network (that protects women suffering from domestic violence). This reality was reflected in the telenovela *Vencer al Desamor*, which is about a journalist researcher conducting a professional inquire about a serial femicide, and in every chapter the audience is recommended to denounce any violent situation. At the regional level, this impact is added to those highlighted by the Peruvian report in a discouraging context of gender violence that bleeds the country. *Telenovela* from Del Barrio Producciones *Mi Vida Sin Ti* has a central axis on the different forms of gender violence against women, and its impact moved to social networks, generating discussions with active partici-

pation of actress and actors in live, aimed at breaking down models and paradigms standardized in Peruvian society that form part of the violence against women.

6. Topic of the year: Ibero-American television fiction in times of pandemic

As it has been seen, COVID-19 affected all Obitel countries in deferent ways and proportions. When the pandemic was declared by the WHO, countries from the northern hemisphere were in the middle of their production year, while in southern Latin America countries activities were just getting started, and some of these countries were just returning from summer vacation. This explains the diversity of strategies implemented by the TV channels and the fiction audiovisual industry when facing an uncertain 2020. In any case, to opt for productions already completed and reprises was the best choice to have a whole TV programing. All the TV channels had to adjust their 2020 premiere calendar, deferring or cancelling projects. In consequence, given the decrease of canned production, live TV strip products were also used. Anyhow, the severe restriction derived from the pandemic and the confinement during first half of 2020, such as the limited capacity and the virus traceability through continuous COVID-19 tests became real barriers to fiction audiovisual production, considering the necessity of actors, production managers and support and technical staff.

If we have to summarize Ibero-American fiction content production in one word, it would be crisis. There is no doubt that one of the most affected sectors by the pandemic was the audiovisual. The US report facilitates data that help to understand the dimension of the impact: in March 2020, Netflix, Amazon, Disney, Warner Bros, Apple TV, NBC, CBS, Fox and ABC production was completely stopped, and

the production of around 97 TV series and 21 pilots was suspended as well. As it has been already mentioned, this is an activity that requires, in all its phases, the presence of a significant group of people in the same place. This is the reason why health restrictions affected one of minimum conditions needed for professional practice in the sector, and many crises situations were triggered in the industry all around the world, except for those productions whose filming phase was already completed. Because, even if some stages of the production chain do not require being present, like script creative writing or audiovisual montage and postproduction, it is true that the main input, the work of actors and production staff, was subject to maximum limitations. In fact, health restrictions limiting distance among people to, at least, one meter, “at the best”, made impossible to actors to perform scenes that implied physical closeness, and certainly not scenes with some intimacy or physical contact. Therefore, those activities that could be performed along, respecting social distance and with no necessity of being in the same place, were the only to be undertaken during the first half of 2020, and even during the worst moment of the second and third waves of the pandemic. Most of them corresponded to fiction production that took advantages of the moment to create different ad-hoc stories, for instance, about psychotherapist seeing patients remotely (Chile) or teenagers confined with their parents (Uruguay).

As above mentioned, streaming turned out to be a real distribution channel for fiction audiovisual, offering different options of contents and display devices for visualization (from cellphones to Smart TV). Venezuela reports a diversity of titles on YouTube and Instagram TV platforms. This is the case of *Amor sin Tapabocas*, a miniseries that uses humor to perform a social criticism, while *Readaptados* is a web show made from chats and video calls about the experiences involved in the confinement. On its part, Brazil took advantage of the so called video calls *pandemic resource* to incorporate it into the stories, and

thus adjust itself to health restrictions. *Diario de Um Confinado* is an example of this: a comedy about a man who lives along in an apartment where new characters appear but through internet calls.

These initiatives appeared as options along with reruns of fictions that have succeeded in previous years, among which stand out Turkey *telenovelas* that were shown in prime-time, as it is indicated in the US report. When fiction reruns had a national origin, actors, as occurred in Argentina, who took part in them exercised their performance rights, driving by the difficult economic situation originated by the stop of a significant proportion of the audiovisual industry.

This crisis also affected structural aspects of the industry. Many audiovisual producer companies were on the verge of bankruptcy or were out of business. Dismiss employees and downsize were the first attempts to avoid lockout, as it happened to once successful Pol-Ka. In Mexico, Televisa publicly informed about its economic losses for more than half the year, and despite the lifting of certain health restrictions for production, it closed the year with uncertainty about the impact of the pandemic on advertisement income. In any event, profits reductions were compensated by lower spending in fiction audiovisual production caused by the stop of the activity for nearly three months.

According to a well-known saying, in the midst of every crisis, lies great opportunity. Indeed, the COVID-19 pandemic and its restriction on movement and the massive confinement of the people ended up promoting a major TV consumption. And while reruns allowed TV programming to continue, the nostalgia produced by old *telenovelas* was also exploited as a niche industry. In this sense, TV channels from most of the countries in this report uploaded their files to online platforms, using diverse strategies. Some of them, for instance public channels TVN in Chile and RTP in Portugal, used the platform as a repository; while others, like Spain and Brazil, have

developed VOD streaming platforms with various charging and financing strategies.

In virtually every country, audiovisual production was almost non-existent during the first three months of the pandemic. However, in mid-2020 filming was retaken by the advertise industry and by Amazon Prime and HBO international productions. This was the case of Uruguay, while in Colombia a process of production reconfiguration took place thanks to agreements among the above-mentioned producers, other production companies and some international distributors.

In Venezuela, the internationalization of national fiction took shape with series like *Almas en Pena* and *Carolay*, and, as other region experiences, small artistic and technical teams and scenes with few characters were the best options for reducing the risk of contagion and the quarantine of possible COVID-19 infected production groups. This change in the common mode of audiovisual creation was followed by Peru, specifically by Del Barrio Producciones that created a story just with five characters; and by Televisa that had to eliminate a love scene where two characters were kissing from one of its productions to avoid contagious, and created a color code according to the degree of contact and physical closeness among actors.

IN the US, Telemundo production, *100 días para enamorarse*, giving the impossibility of physical encounters among actors and considering the possibility of one of them to be quarantined, took a drastically solution consisting in green screens for filming scenes from home. Actors had to choreograph the scene at home with some mates, while some stuntmen were at the filming set backing the camera simulating the presence of the characters in the same place. But even though it was a creative solution, audiences complained in social medias about the *telenovela* characters lack of passion. Meanwhile, Spanish productions have to rewrite scrips to adapt them to the care needs imposed by the pandemic. Other action performed consisting in filming actors in

different shots, a hundred meters apart, and then place them in parallel to simulate being in the same space.

Once health restrictions for audiovisual productions were lifted in the last quarter of 2020, it is interesting to note that the pandemic did not become a storyline for new productions, although it was used as an opportunity for both the topic addressed -closed to all kind of audiences- and the production strategy. Mexico highlights that just two productions, *La Rosa de Guadalupe* and *Como Dice el Dicho*, included the topic in some of their chapters. They approached the situation by placing the disease as the core of the story and creating a COVID-19 ambiance, characterized by the use of mask. Brazil presents a different case: *Sob Pressão-Plantão COVID* from Globo and some series that approach the challenges of love and intimacy in a forced cohabitation due to the pandemic.

To a lesser extent, Chile also presents two productions: one series, *Historias de Cuarentena*, and one telenovela with a twist of comedy that takes place in a residence building during the pandemic, *Edificio Corona*. The creative contributions trying to transform the restrictions of a reality changed by the COVID-19 were also observed in Spain with the release on VOD of *En Casa* and *Relatos Con-fin-a-dos*. The rest of Spanish series did not incorporate the coronavirus disease into their stories, excepting *Cuéntame Cómo Pasó*. This series began in 2001 telling the story of Alcántara family buying its first television in 1968, and uninterruptedly has been a reflection of what has happened in the country year after year. In an unprecedented way, in 2020 it makes a temporal jump from 1992 to present moment showing the main characters, already old, in a COVID-19 context.

In the following pages, teams from every Obitel country will present details that give shape to the state of TV fiction audiovisual production, distribution, exhibition and consumption. As it happened to all world economic activities, COVID-19 pandemic completely af-

fected human life. Open television was already presenting a very complex crisis during the last years, and the coronavirus, in most of the cases, accelerated processes that were already under way, like streaming and the participation of international production platforms associated to VOD. Nevertheless, as it has been recalled by the Portuguese team, TV business is not weakened it just has changed, and its role as an encounter space for private and public is more present than ever, especially during the COVID-19 pandemic and the confinement we were forced to.

SECOND PART

Fiction in the Orbitel Countries in 2020

1
ARGENTINA¹ :
PANDEMIC, ISOLATION AND STAGNATION
OF AUDIOVISUAL PRODUCTION

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Introduction

The pre-existing crisis of national fiction that Obitel Argentina has been reporting at least since 2010 worsened in the context of the pandemic when the on-air channels released only four Argentine productions that represented 61 hours, the lowest figure since we have been keeping records. The leading channels, especially Telefe, obtained good audience results by programming numerous telenovelas of Brazilian and Turkish origin. If it is true that media corporations have all their past ahead of them, the pandemic allowed them to reintroduce with moderate success some fictions that were successes in their original broadcasts. The data presented here show the complete paralysis of national produc-

1 The Obitel Argentina team would like to thank Kantar IBOPE Media, since without the information provided by them it would not be possible to carry out some of the studies presented here.

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tion, an abrupt and unusual increase of reruns of different origin, the return of narco telenovelas to broadcast TV and the outstanding role of Televisión Pública in the broadcasting of a significant number of national productions, some releases, and especially reruns (Nicolosi, 2021) that allowed the actors to collect royalties for performing rights, a relevant fact in a critical context of virtual paralysis for the fiction industry as a whole.

1. The Audiovisual Context of Argentina in 2020

Marked by the impact of the health crisis, the audiovisual context in 2020 shows a negative balance in almost all areas. Regarding the impact of Covid-19 on the production of Gross Value Added (GVA), i.e. its contribution to the creation of wealth, the generation and maintenance of jobs and consumption, the indicators are, as expected, downward. The most affected audiovisual activity was cinema exhibition in movie theaters, which had the lowest number of tickets sold since records have been kept and, possibly, the lowest number in a century (INCAA, 2020). The impediment to the presence and agglomeration of people in closed spaces included this activity among the first to be closed as part of the containment measures promoted by the national government as of March 19, 2020. At the same time, the numerous limitations and the limited capacity allowed in the return of the activity during the last part of the year did not allow a recovery of the activity, although it did allow the resumption of the re-engagement with audiences. Television was considered an essential activity and its workers were exempted from the restrictions on circulation that applied to the rest of the population (Decree 297/2020 art. 6, paragraph 9), so that the levels of broadcasting activity were maintained. At the same time, and despite the economic recession that accompanied the pandemic, pay

TV subscription levels were maintained. This is partly due to changes in the domesticity and routines of people who initially had more time for leisure and consumption of cultural goods at home (SInCA, 2020). In open television, there was a greater presence of news content, a continuation of the downward trend in audience share and a drastic reduction in the number of fiction release hours due to the paralysis of filming, so that programming was mainly based on reruns and entertainment content.

1.1. Open Television in Argentina

Of the cultural industries, the audiovisual industry is the one with the greatest economic magnitude: it contributes 84% of the gross value added of the cultural sector and 51.2% of the jobs (Bulloni Yaquinta et al., 2021). Open television in particular makes a significant contribution and during 2020 was not exempt from difficulties generated, in part, by the contraction of the advertising market. However, the main broadcasters analyzed in this chapter did not manifest major alterations and continued their operations amidst the atypical context.

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 with contributions from the National Treasury, official advertising, taxes provided for by the Audiovisual Communication Services Law and other resources of its own. The other five networks are privately managed commercial channels.

Chart 1. National open television channels in Argentina

Private broadcast / channel (5)	Public broadcast / channel (1)
América 2 (channel 2)	TV Pública (channel 7)
El Nueve (channel 9)	
Telefe (channel 11)	
El Trece (channel 13)	
Net TV	
CHANNEL TOTAL= 6	

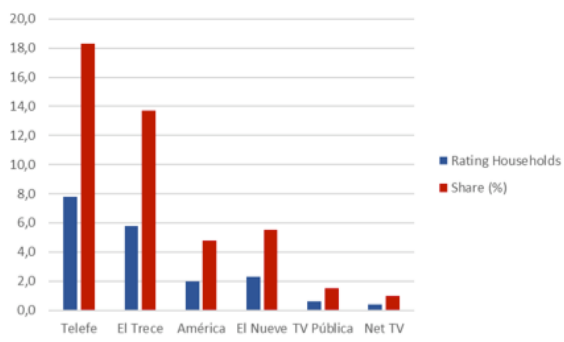
Source: Obitel Argentina

The four traditional networks reach the entire country through affiliates, repeaters or content sales: TV Pública, Telefe, El Trece and El Nueve. Although with marginal audience levels, Grupo Perfil's on-air network, NetTV, has been operating since 2018, with generalist programming. In some time slots this new signal disputes the sixth position to a very weakened TV Pública. Only the state-owned broadcaster holds a national license and covers most of the national territory with its signal (99.5%), while the leaders, Telefe and El Trece, reach all provinces through direct ownership or by association with the main local broadcasters. The six nationwide networks broadcast their programming through cable television, mostly privately managed and with high countrywide reach. TV Pública formally depends on the board of directors of Argentine Radio and Television State Society (RTA S.E.), which operates within the scope of the Federal System of Media and Public Contents (SFMyCP), created in 2015. América is part of the América Medios group. Telefe is owned by U.S.-based Viacom Inc. together with eight repeaters in the interior of the country. Clarín holding company operates El Trece through its Artear division 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 mill in the country. The ownership of El Nueve is the subject of a legal dispute between the Chairman of the Board, local businessman Carlos Loréfice Lynch, and Mexican investor Remigio

González González. The legal proceedings, which are still in progress in a Delaware court (United States), did not prevent the sale of 90% of the shares to Grupo Octubre, led by Víctor Santa María, a trade unionist turned media businessman. Grupo Octubre has expanded in recent years in the printing press business with the purchase of the newspaper *Página/12* and several magazines; radio broadcasting through the ownership of one of the most listened AM radio stations in Buenos Aires (AM 750) and several FM radio stations. By the end of 2020, it also created a news signal for pay TV, IP.

Graph 1. Audience and share by station

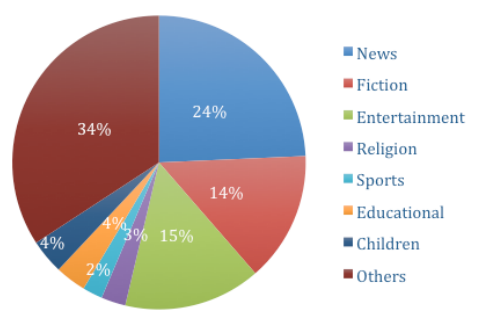
Channel	Rating Households	%	Share (%)
Telefe	7,8	40,9	18,3
El Trece	5,8	30,6	13,7
América	2,0	10,7	4,8
El Nueve	2,3	12,2	5,5
TV Pública	0,6	3,2	1,5
Net TV	0,4	2,3	1,0
TOTAL	19,0	100,0	44,8



Source: Kantar Ibope Media and Obitel Argentina.

Graph 2. Genres and hours broadcast in TV programming

Genres broadcast	Screening hours	%
News	12.008:00	24,3
Fiction	7.047:00	14,3
Entertainment	7.425:00	15,1
Religion	1.349:00	2,7
Sports	1.065:00	2,2
Educational	1.668:00	3,4
Children	1.884:00	3,8
Others	16.887:00	34,2
TOTAL	49.333	100



Source: Kantar Ibope Media and Obitel Argentina.

In 2020, an increase in the supply of news content is observed due to the exceptional nature of the events related to the pandemic and the greater eagerness of audiences to have live access, especially to official decisions during the months of March and April. This period is also coincident with a significant increase in the rating of all news signals transmitted through pay TV (Espada, 2020; Kantar-Ibope Media, 2021). At the same time, there was a significant drop in the number of

hours dedicated to sports, partly due to the lack of activities in this area during most of the year. Two genres long neglected by open television, such as humor and children's content, also fell. The latter is paradoxical, since, as consultants such as Parrot Analytics (2020) point out, the year was marked by a shift towards greater demand for lighthearted, entertaining content aimed at children and young people, the latter due to the greater presence of these audiences at home. At this point, open television seems to have given up the possibility of concentrating younger audiences from the linear screen (despite the fact that Televisión Pública offered a four-hour daily educational series⁴). Fiction went from 7.4% in 2019 to 14% of the total hours broadcast in 2020, although a minimal portion of that total is national premiere fiction.

The open television audience continued its declining trend that has been a decade-long migration of audiences to other platforms. With the sole exception of *Telefe*, the other open channels continued to lose audience, despite the exceptionality of the year, the greater availability of time for entertainment and the higher demand for news content. As a whole, the five open channels captured 44.8% of the linear television share, exactly one point less than in the previous year, being surpassed by the pay TV channels, which now have a 55.2% share of the total television share.

Telefe widens its lead over *El Trece*, which remains in second place. Televisión Pública fails to break with a cycle of audience loss that *Obitel Argentina* reports since 2016, and during 2020 fell by 40%

4 The program *Seguimos Educando*, a joint initiative of Televisión Pública and the National Ministry of Education, distributed an average of seven hours a day of educational content on open television for all levels of formal education, combining "teleclasses", cartoons and documentaries. See <https://www.tvpublica.com.ar/programa/seguimos-educando/>

in relation to the previous year, averaging just 0.6 points, even below many pay-TV signals.

1.2. Pay TV and VoD Platforms in Argentina

According to data from the National Communications Agency (ENaCom) for the third quarter of 2020⁵, 69.3% of Argentine households had some pay TV service, mostly through physical links, while satellite technology captures a smaller market share of less than 20%. If clandestine connections are added, it is estimated that close to 80% of the country's households have access to this service, one of the highest penetration levels in the continent. There are 7.3 million households with this service, a marginal increase compared to those reported the previous year. However, according to the same official agency, there are important geographical asymmetries in the access to the service: while provinces such as Córdoba, Tierra del Fuego, La Pampa and the Autonomous City of Buenos Aires show figures above 60%, at the other extreme Catamarca, Tucumán, La Rioja, among others, are around 25%. The pay TV market is strongly concentrated mainly in Cablevisión, a division of Grupo Clarín, which controls 40% of the market, especially in provincial capitals and the most profitable urban centers. There are also peripheral players such as telecommunications cooperatives and SMEs that provide this service in places farther away from large urban centers and with lower population density and commercial interest, which together account for less than 20% of the pay TV market. The trend that Obitel Argentina has reported in recent years regarding alliances between

5 Official ENaCom data for the third quarter of 2020. Available at <https://indicadores.ena-com.gob.ar/Informes>

pay TV networks, operators and broadcast TV channels for the production and distribution of fictions in different platforms was also affected by the generalized stagnation of the sector.

Chart 2. Pay TV channels in Argentina

Outstanding Pay TV networks in 2020
1) A24 (news), 2) TN (news), 3) C5N (news), 4) LN+ (news) 5) Crónica TV (news), 6) Canal 26 (news), 7) CNN Español (news), 8) IP (news)
TOTAL: 8 news networks

Source: Obitel Argentina

The pay TV market in Argentina has the particularity of offering a profuse and growing number of national channels dedicated to the broadcasting of news, opinion and political debate content. As of 2020, there were 7 nationally-owned channels, along with CNN en Español, which produces some programs hosted by Argentine journalists. These broadcasters are usually among the most watched pay TV channels and, in prime-time slots, they surpass Net TV, TV Pública, América and El Nueve. In fact, during 2020, together they had an average of 8.2 rating points, more than the leading open TV channel. Towards the end of the year, a new station was added to the grid, IP, the news signal of Grupo Octubre, which controls Canal 9. During this year, there was no release of national fiction on any subscription television channel.

Chart 3. VoD in Argentina

Top 10 VoD platforms active in 2020	Total
Netflix, Prime Video (Amazon), Movistar Play (Telefónica), Claro Video (América Móvil), Disney+, HBO Go (Warner Media), Cablevisión Flow (Telecom), Cine.ar Play and Cont.ar (National State), Sensa (Colsecor)	10
TOTAL	10

Source: Obitel Argentina.

The table above presents a list of the top 10 video-on-demand platforms active in Argentina as of 2020. It is not an exhaustive list but just a sample of players with the highest market penetration (Netflix, Cablevisión Flow) together with others that provide ownership diversity, such as Sensa (a cooperative VOD platform) or those belonging to the National State. For the purposes of this list, the official YouTube channels of open television broadcasters are not included.

1.3. Independent Television Fiction Production Companies

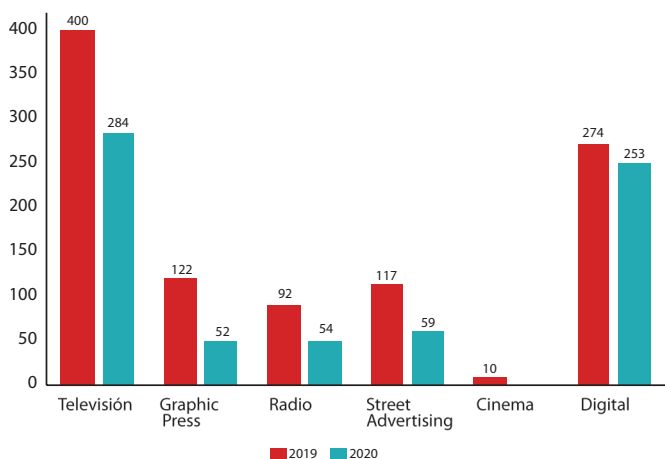
Three open television channels showed national fiction releases during 2020: El Trece, Telefe and TV Pública. In the first case, it was the fiction *Separadas*, a Pol-Ka production whose broadcasting was first suspended due to the impossibility of continuing filming and later definitively cancelled amid public disagreements and disputes between the production company, some of its protagonists and the Argentine Actors Association (Asociación Argentina de Actores). Since then, Pol-Ka, one of the largest independent fiction production companies in the country, began a retraction process that included the

reduction of its workforce and difficulties to pay salaries, which were partially covered with emergency aid provided by the National State. Telefe presented *Los Internacionales*, an eight-episode miniseries co-produced with Colombia, with the participation of Viacom International Studios, while TV Pública broadcast the first fiction produced in pandemic, *Terapia en Cuarentena*, a miniseries by NOS producciones with little previous experience in fiction.

1.4. Sources of Financing for the Audiovisual Sector

The Argentine Chamber of Media (CAAM), reports that “the pandemic made 2020 a very particular year in terms of media consumption. In millions of USD, in 2019 the estimated total advertising investment was USD 1,016 and in 2020 it fell to USD 703”⁶.

Graph 3. Estimated Advertising Investment in the industry (in millions of USD)



⁶ Data from the Argentine Chamber of Media <https://www.newslinereport.com/negocios/nota/la-inversion-publicitaria-vario-en-argentina>

According to their estimates the overall drop was slightly more than 30% in relation to 2019, the biggest drop is evident in television investment and disappears completely for cinema. Although television dominates the distribution of the advertising pie, it loses ground year by year to the Internet, which as of 2019 concentrated 27% of investment. Television, on the other hand, benefits proportionally more from government advertising. According to official data for the second half of 2020, the six open television channels received \$843,485,211 million Argentine pesos, which represents 17% of the total investment made by the National State in that period⁷. According to ENaCom data, during the third quarter of 2020 the Audiovisual Communication Services, an item that concentrates television and radio, had a turnover of \$ 25,718 million Argentine pesos, which represents 5% of the total turnover of the information and communication sector in the country. Subscription television was a much more lucrative business and in the same period had revenues of Ps. 112,404 million. The promotion fund administered by the film institute (INCAA) is another source of financing for the production of fiction films and series, but in 2020 it was limited to minimal budget executions. On the other hand, this fund is mostly composed of a levy charged on movie tickets, so the lack of attendance to theaters severely affected the resources available to finance new contents.

7 Official data from the Office of the Chief of Cabinet of Ministers for the second half of 2020. Available at https://www.argentina.gob.ar/sites/default/files/informe_publicidad_oficial_2020_2.pdf

1.5. Communication Policies

In 2020, the unprecedented situation generated by the Covid-19 pandemic exposed more clearly a series of exclusions and digital inequalities that were centered on the issue of connectivity and its asymmetries. Faced with a greater demand for connectivity for education, work, shopping, banking or state procedures, entertainment and information, these previous inequalities deepened, leaving a good part of the citizenry in a situation of greater relative lack with respect to the time before the pandemic, an issue that the National State addressed with different public policy tools. Among the different specific actions aimed at facilitating access to devices and connectivity, especially in the most vulnerable areas and popular neighborhoods, it is worth mentioning the Decree of Necessity and Urgency 690 of August 2020, which declares mobile telephony a public service, reestablishes the figure of “public services in competition” to Information Technology services (telephony, Internet, pay TV) and suspends tariff increases until the end of the year. At the closing of this chapter, aspects of the regulation of the Decree, especially those referring to the state intervention in the regulation of the tariffs of the services now declared public, were in court, partially implemented by only some companies, especially cooperatives that decided to comply with it.

1.6. Digital and Mobile Connectivity Infrastructure

Mobile telephony continues to be, together with free and open television, the most widespread information access technology, with a nationwide penetration that exceeds 100% in almost all regions of the country, and a national average of 120.1% according to ENaCom data for the third quarter of 2020. However, more than 50% of active mobile lines are prepaid, usually more widely used among lower-middle socioeconomic sectors. The deployment of 4G technology has grown rapidly in recent years, reaching a wide coverage of the territory. During 2020, the installation of the necessary infrastructure to bring the service to different points of the country slowed down, but did not stop. Nevertheless, as of the third quarter of 2020, 15 departments in 9 provinces did not have this type of service.

Regarding home broadband, the national average penetration reached 66.3% of the country's households, a slight increase compared to 2019, probably due to the greater number of activities that required internet access at home since the beginning of the quarantine. Likewise, there are regions such as the City of Buenos Aires where the adoption of the service is almost total, and other provinces such as Formosa, Mendoza, San Juan and Santa Cruz, where this figure does not exceed 40% of households. Although the national average speed exceeds 40 Mbps download (almost double that of the previous year) and access offers of more than +30 Mbps are common, 31% of domestic connections are concentrated in the speed range from 1 to 6 Mbps, with large variations in the speed available depending on the province. Fiber optics, one of the most robust technologies and with the best capabilities to support the transmission of large amounts of data such as

those required by VoD, represents 8.3% of accesses, almost two points more than the previous year⁸.

The territorial extension added to the dispersion of the population in rural areas or in small urban concentrations, combined with the absence or low quality of connectivity infrastructure in some regions and economic difficulties, impede Internet access. The absence of the market and the state in some areas of the country has allowed the deployment of telecommunications cooperatives and, more experimentally, the emergence of community internet access networks self-managed by the inhabitants themselves.

8 These are official data from ENaCom. Available at <https://indicadores.enacom.gob.ar/Informes>

2. Analysis of the Year: National and Ibero-American Premiere Fiction on Open TV

Table 1. Fictions shown in 2020 (national and imported; releases, reprises and co-productions).

<p>NATIONAL PREV. UNRELEASED PRODUCTIONS – 4</p> <p>El Trece- 1 national production 1. <i>Separadas</i> (telenovela)</p> <p>TV Pública – 3 national productions 2. <i>La Persuasión</i> (series) 3. <i>Si solo si 3</i> (miniseries) 4. <i>Terapia en cuarentena</i> (miniseries)</p> <p>Telefe - 0 Canal 9 – 0 América - 0 NefTV – 0</p> <p>CO-PRODUCTIONS – 1</p> <p>Telefe – 1 production 1. <i>Los Internacionales</i> (Argentina / Colombia)</p> <p>OBITEL IMPORTED PREV. UNRELEASED PRODUCTIONS –7</p> <p>Telefe – 3 productions 1. <i>Acoso</i> (miniseries - Brazil) 2. <i>Club 57</i> (telenovela - Italy/USA hispanic) 3. <i>Jesús</i> (telenovela - Brazil)</p> <p>Net TV – 3 productions 4. <i>Fugitivos</i> (series -Colombia) 5. <i>La ley secreta</i> (series -Colombia) 6. <i>La promesa</i> (series -Colombia)</p> <p>TV Pública – 1 production 7. <i>La otra mirada</i> (series – Spain)</p> <p>NON OBITEL IMPORTED PREV. UNRELEASED PRODUCTIONS – 7</p> <p>Telefe – 7 productions 1. <i>Alas rotas</i> (telenovela – Turkey) 2. <i>Cesur</i> (telenovela – Turkey) 3. <i>Fuerza de mujer</i> (telenovela – Turkey) 4. <i>Guerra de rosas</i> (telenovela – Turkey) 5. <i>Huérfanas</i> (telenovela – Turkey) 6. <i>Lazos de sangre</i> (telenovela – Turkey) 7. <i>Y tu quien eres</i> (telenovela – Turkey)</p>
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REPRISE PRODUCTIONS – 30

Telefe – 3 productions

1. *Casados con hijos* (series – Argentina)
2. *Elif* (telenovela – Turkey)
3. *Floricienta* (telenovela – Argentina)
4. *Perra vida* (series-Brazil)

El Trece – 4 productions

5. *Argentina tierra de amor y venganza* (telenovela – Argentina)
6. *El tigre Verón* (series – Argentina)
7. *Las mil y una noches* (telenovela – Turkey)
8. *Otros pecados* (miniseries – Argentina)

Net TV – 8 productions

9. *El cartel* (telenovela – Colombia)
10. *El patrón del mal* (telenovela – Colombia)
11. *La niña* (telenovela – Colombia)
12. *La reina del flow* (telenovela – Colombia)
13. *La ruta blanca* (telenovela – Colombia/Mexico)
14. *La viuda negra* (telenovela – Colombia)
15. *Las muñecas de la mafia* (telenovela – Colombia)
16. *Tiro de gracia* (telenovela – Colombia)

TV Pública – 14 productions

17. *Amores de historia* (miniseries – Argentina)
18. *Balas perdidas* (miniseries – Argentina)
19. *Conflictos modernos* (miniseries – Argentina)
20. *Doce casas* (miniseries – Argentina)
21. *El secretario* (miniseries – Argentina)
22. *En terapia* (miniseries – Argentina)
23. *Germán últimas viñetas* (miniseries – Argentina)
24. *Historia de un clan* (miniseries – Argentina)
25. *Jorge* (miniseries – Argentina)
26. *La última hora* (miniseries – Argentina)
27. *Las 13 esposas de Wilson Fernández* (miniseries – Argentina)
28. *Los Sónicos* (miniseries – Argentina)
29. *Ultimátum* (miniseries – Argentina)
30. *Variaciones Walsh* (miniseries – Argentina)

GRAND TOTAL NATIONAL PREV. UNRELEASED: 5

GRAND TOTAL OBITEL PREV. UNRELEASED: 7

GRAND TOTAL NON OBITEL PREV. UNRELEASED: 7

GRAND TOTAL REPRISES: 30

Source: Kantar Ibope Media and Obitel Argentina.

In 2020, 11 Obitel productions were released, compared to 26 the previous year. This consolidates a downward trend that began in

2014 when the number of releases reached 48 productions. El Trece aired the first chapters of a telenovela, *Separadas*, whose recordings were first suspended due to the pandemic and then definitively cancelled. Telefe scheduled an Argentine-Colombian miniseries, *Los Internacionales*, in which its controlling company Viacom International Studios participated as producer, but with poor results in terms of audience. Finally, TV Pública presented three miniseries in an unprecedented way for open television, two of which were finished at the time of the beginning of the quarantine and a third which became the first fiction filmed in confinement. The persistence of Brazilian telenovelas broadcasted mainly by Telefe stands out, together with the novelty of Net TV, which intensified its fictional profile with narco telenovelas of Colombian origin.

Table 2: Premiere fiction in 2020: Countries of origin

Countries	Titles	%	Chapters/ Episodes	%	Hours	%
NATIONAL (total)	5	41,7	83	17,5	61:45	14,7
OBITEL COUNTRIES (total)	7	58,3	392	82,5	356:15	85,3
Argentina	4	33,3	75	15,8	55:00	13,2
Brazil	2	16,7	136	28,6	179:00	42,9
Chile	0	0,0	0	0,0	0:00	0,0
Colombia	3	25,0	194	40,8	153:00	36,7
Ecuador	0	0,0	0	0,0	0:00	0,0
Spain	1	8,3	2	0,4	01:25	0,3
USA (hispanic productions)	1	8,3	60	12,6	22:50	5,4
Mexico	0	0,0	0	0,0	0:00	0,0
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
CO-PRODUCTIONS (total)	0	0,0	0	0,0	0:00	0,0
Argentine co-productions	1	0,0	8	0,0	06:45	0,0
Co-productions between Obitel countries	0	0,0	0	0,0	0:00	0,0
GRAND TOTAL	12	100,0	475	0,0	418:00	100,0

Source: Kantar Ibope Media and Obitel Argentina.

As for national premiere fiction, there is a general drop in all the indicators observed in comparison with the previous year. In 2019, there were 18 national premiere productions, against 5 in 2020; the number of episodes fell from 480 to 83 and the number of hours from 371 to 61. However, Obitel premiere fiction registered a much milder drop and managed to keep its place on the local screen: it went from 8 productions in 2019 to 7 in 2020; from 421 episodes to 392 and from 293 hours to 356 last year.

Table 3. Formats of national and Ibero-American fiction

Format	National						Ibero-American					
	Titles	%	C/E	%	H	%	Titles	%	C/E	%	H	%
Telenovela	1	20,0	35	42,2	35:00	56,9	3	42,8	194	49,5	210:30	59,0
Series	0	0,0	0	0,0	00:00	0,0	3	42,8	190	48,5	140:45	39,4
Miniseries	4	80,0	48	57,8	26:45	43,1	1	14,4	8	2,0	05:40	1,6
Telefilm	0	0,0	0	0,0	0:00	0,0	0	0,0	0	0,0	0:00	0,0
Unitary series	0	0,0	0	0,0	0:00	0,0	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
Total	5	100,0	83	100,0	61:45	100,0	7	100,0	392	100,0	356:15	100,0

Source: Kantar Ibope Media and Obitel Argentina.

Considering the number of national releases, once again, as in the previous year, the miniseries prevails over the other formats. The telenovela, on the other hand, is first in the number of programmed hours among productions from the rest of Ibero-America.

Table 4. Top 10 most watched shows on open television

	Titles	Channel	Production company	Format/Genre	No. of chap/ep (in 2020)	Time slot	Rating (%)	Share (%)
1	<i>Jesús</i>	Telefe	Casablanca and RecordTV	Telenovela/Biblical	115	Prime Time	12,6	24,1
2	<i>Separadas</i>	El Trece	Pol-ka	Comedy	35	Prime Time	9,0	18,3
3	<i>Acoso</i>	Telefe	Globo	Miniseries/Drama	8	Prime Time	6,9	17,4
4	<i>Los internacionales</i>	Telefe	Viacom Studios	Miniseries/Crime	8	Night	4,6	12,8
5	<i>Club 57</i>	Telefe	Rainbow SpA and Nickelodeon	Telenovela/Musical	60	Morning	1,0	4,9
6	<i>La promesa</i>	Net TV	CMO/Caracol	Series/Drama	67	Afternoon	0,6	1,4
7	<i>La persuasión</i>	TV Pública	El Buey solo	Miniseries/Comedy	8	Night	0,5	2,2
8	<i>Fugitivos</i>	Net TV	Caracol	Series/Drama	19	Afternoon	0,5	1,3
9	<i>Terapia en cuarentena</i>	TV Pública	NOS/Contenidos Públicos S.E	Miniseries/Comedy	8	Night	0,3	1,2
10	<i>Si solo si</i>	TV Pública	Manda de Dos Producciones	Miniseries	24	Morning	0,2	0,8

Source: Kantar Ibope Media and Obitel Argentina.

The trend observed in recent years of a drop in the average rating and share of the ten most watched programs continues. Usually, the top ten presented by Obitel Argentina shows that Telefe and El Trece share almost equally in this list, both with national or Obitel productions. However, 2020 is atypical since the two leading channels programmed one national production each, being in the case of Telefe a co-production. After regaining the first place for a national production in 2019, during 2020 a Brazilian production takes over again as the most watched premiere fiction. In fact, if it were possible to consider fictions of Turkish origin, the list of the most watched fictions would include seven Turkish fictions, two Brazilian ones and only one from Argentina. Due to the very reduced broadcasting of national productions, it was unnecessary to prepare the table usually presented here with the most watched Argentine productions, because the previous table contains almost all the shows released, including all the national ones.

Table 5. Audience profile of the 10 most watched shows: gender, age, socioeconomic level.

Titles		Channel	Age groups %				
			4 - 12	13 - 18	19 - 24	35 - 44	45 +
1	<i>Jesús</i>	Telefe	18,4	23,2	24,1	17,1	17,3
2	<i>Separadas</i>	El Trece	13,3	24,7	18,9	26,8	16,2
3	<i>Acoso</i>	Telefe	14,6	19,0	28,6	17,0	20,8
4	<i>Los internacionales</i>	Telefe	13,6	25,3	27,6	17,5	16,1
5	<i>Club 57</i>	Telefe	29,6	19,6	27,5	13,7	9,5
6	<i>La promesa</i>	Net TV	11,2	11,6	41,4	10,8	25,1
7	<i>La persuasión</i>	TV Pública	34,5	4,0	3,8	23,5	34,1
8	<i>Fugitivos</i>	Net TV	26,9	22,8	19,2	7,0	24,0
9	<i>Terapia en cuarentena</i>	TV Pública	3,8	0,0	0,0	27,9	68,3
10	<i>Si solo si</i>	TV Pública	5,0	31,5	32,1	12,4	19,0

Titles		Channel	Gender %		Socioeconomic level %			
			Women	Men	ABC1	C2	C3	D
1	<i>Jesús</i>	Telefe	55,0	45,0	1,6	15,5	38,6	44,3
2	<i>Separadas</i>	El Trece	53,5	46,5	6,5	38,1	30,6	24,8
3	<i>Acoso</i>	Telefe	62,7	37,3	6,4	27,1	30,5	36,0
4	<i>Los internacionales</i>	Telefe	52,2	47,8	12,6	15,2	31,4	40,8
5	<i>Club 57</i>	Telefe	57,2	42,8	0,8	19,4	22,8	57,0
6	<i>La promesa</i>	Net TV	72,1	27,9	6,6	21,9	19,5	52,0
7	<i>La persuasión</i>	TV Pública	32,5	67,5	0,0	60,6	23,1	16,3
8	<i>Fugitivos</i>	Net TV	61,6	38,4	0,2	9,8	12,6	77,3
9	<i>Terapia en cuarentena</i>	TV Pública	19,6	80,4	0,0	17,0	51,4	31,5
10	<i>Si solo si</i>	TV Pública	37,5	62,5	4,2	26,3	52,6	16,9

Source: Kantar Ibope Media and Obitel Argentina.

Measured by gender, this year the average audience is almost equally divided between women (50.4%) and men (49.6%), which may be explained not so much by changes in the profile of the programmed fictions as by the greater presence of the family at home throughout the day, as a result of the confinement. As for the socioeconomic level, the drop in audience with higher purchasing power accelerated

sharply, representing only 3.9% on average for the first 10 fictions. The middle class sectors (C2 and C3) concentrated 56.4% of the audience, while the remaining 39.7% was made up by those at the bottom of the pyramid by socioeconomic level. Audiences with greater purchasing power diversify their agenda of cultural consumption in the growing offer of video-on-demand platforms, while open television remains as a space for middle and popular sectors with lower incomes. 64.7% of the fiction audience on open TV is 18 years old or older, while the infant-juvenile audience represents the remaining 35.3%, a drop of 3% with respect to the previous year. In sum, despite the exceptionality of the year and the transformations in domesticity, open television and in particular fiction did not manage to revert trends that we have been reporting for several years referred to the gradual loss of open television audience, together with the impoverishment and aging of the audiences that consume fiction on that screen.

3. VoD 2020 Monitoring

Since March and after the first containment measures against the Covid-19 pandemic implemented by the National Government, which included a prolonged period of social isolation, the greater permanence of people at home has altered the usual patterns of the attention economy. Available data show a greater growth in the number of subscribers to the main platforms, together with a greater number of hours dedicated to on-demand content viewing. The platforms benefited from the global context not only because of the greater availability of time and resources to devote to home entertainment, but also because of their business models independent of the advertising market, which is shrinking globally. At the same time, the greater planning in

the production of original content and the licensing of content produced in different countries allowed them, unlike linear television, to present novelties practically all year round. The early arrival of Disney+ in the region is a relevant fact for this market, but it is not yet on the radar of our observations, since so far it bases its content offer on the extensive catalog that precedes it rather than on the production of original fiction content.

3.1. VoD Platforms Market

2020 was a year of landing, expansion and growth for several of the main video on demand platforms operating in the country. Netflix continues to be the main player in this market. According to data from local consulting firm Carrier y Asociados, it was estimated that by mid-2020 there were 4.8 million subscribers to the Netflix service in the country, which due to account sharing and family consumption practices represents a much higher number of actual viewers. The figure is significant because in the midst of the pandemic, the platform managed to attract 800 thousand new subscribers compared to the previous year, according to the same consultant. If we consider the total imports of audiovisual services made in 2020, 65% correspond to Netflix, 18% to Spotify and 17% to all other platforms that offer on-demand audiovisual services from outside the country. Considering that there are more than 7 million households with broadband in the country, VoD services would still have ample room to continue growing, unlike the situation in markets such as the United States and Canada, which are already close to saturation. However, in 2020 Netflix also began to feel the increased competitive pressure from other large corporations that made their definitive launches in the region (González, 2020). In particular,

Disney+ advanced its plans for Latin America with a large and familiar catalog, reaching almost 3.5 million downloads of its app between October 2020 and February 2021, according to Statista estimates (2020).

State-owned platforms also grew in the year of the pandemic, particularly Cine.ar Play, the VoD of the National Film Institute (INCAA) which offered Argentine content in free mode and national film releases in pay-per-transaction mode (TVOD). According to data presented by SInCA, the platform reached 514 thousand active users in 2020, compared to 250 thousand the previous year.

3.2. VoD Analysis in 2020: National and Ibero-American Premiere Fiction

In 2019 Obitel Argentina had reported the release on platforms of 13 productions of national origin, 39 from Ibero-American countries and 2 co-productions. In 2020, in terms of national releases, the number of releases did not vary significantly in relation to the previous year, although there was an increase in the number of productions from Obitel, especially thanks to the greater incorporation of content to Prime Video's catalog, which grew from 3 to 17 Ibero-American productions in one year. In the same vein, the Movistar+ platform grew from 4 productions offered in 2019 to 10 included in 2020. With the exception of Netflix, which maintained at 24 the number offered in the year-on-year comparison, the platforms significantly increased their offer of Spanish-language content. This can be explained by the search to capture market share in a pandemic context in which audiences spent more time consuming on-demand content and subscriptions to this type of service grew.

Table 6. National and Ibero-American fiction programs screened in 2020 in VoD systems

NATIONAL RELEASED PRODUCTIONS	IBERO-AMERICAN RELEASED PRODUCTIONS	CO-PRODUCTIONS
<p>Cablevisión FLOW – 5 national productions</p> <p>1. <i>Tony</i> (miniseries) 2. <i>Adentro</i> (miniseries) 3. <i>Pepper, todo por un like</i> (miniseries) 4. <i>Post Mortem</i> (miniseries) 5. <i>Famoso</i> (miniseries)</p> <p>Netflix – 3 national productions</p> <p>6. <i>Puerta 7</i> (miniseries) 7. <i>Casi Feliz</i> (miniseries) 8. <i>Secreto bien guardado</i> (miniseries)</p> <p>Cont.ar –3 national productions</p> <p>9. <i>Terapia en cuarentena</i> (miniseries) 10. <i>No grites</i> (miniseries) 11. <i>La Persuasión</i> (miniseries)</p> <p>Movistar Play– 1 national production</p> <p>12. <i>Manual de Supervivencia</i> (miniseries)</p>	<p>Netflix – 24 Ibero-American productions</p> <p>1. <i>La Casa de las Flores 3</i> (series - Mexico) 2. <i>Control Z</i> (series - Mexico) 3. <i>Diablero</i> (series - Mexico) 4. <i>Oscuro Deseo</i> (series - Mexico) 5. <i>Historia de un crimen. La búsqueda</i> (series - Mexico) 6. <i>Desenfrenadas</i> (series - Mexico) 7. <i>Onisciente</i> (series - Brazil) 8. <i>Spectros</i> (series - Brazil) 9. <i>Reality Z</i> (series - Brazil) 10. <i>Boca a Boca</i> (series - Brazil) 11. <i>Coisa Mais Linda</i> (series - Brazil) 12. <i>3 %</i> (series - Brazil) 13. <i>Bom dia, Verónica</i> (series - Brazil) 14. <i>El robo del siglo</i> (series - Colombia) 15. <i>La venganza de Analia</i> (series - Colombia) 16. <i>Amar y Vivir</i> (series - Colombia) 17. <i>Alguien tiene que morir</i> (miniseries - Spain) 18. <i>El desorden que dejas</i> (miniseries - Spain) 19. <i>Élite</i> (series - Spain) 20. <i>Las chicas del cable</i> (series - Spain) 21. <i>Los favoritos de Midas</i> (series - Spain) 22. <i>El sabor de las margaritas</i> (series - Spain) 23. <i>Valeria</i> (series - Spain) 24. <i>Vivir sin permiso</i> (series - Spain)</p>	<p>Prime Video – 1 production</p> <p>1. <i>El Presidente</i> (miniseries – Argentina, Chile)</p> <p>Cablevisión Flow – 1 production</p> <p>2. <i>Los Internacionales</i> (miniseries - Argentina, Colombia)</p>

NATIONAL RELEASED PRODUCTIONS	IBERO-AMERICAN RELEASED PRODUCTIONS	CO-PRODUCTIONS
	<p>Amazon Prime – 17 Ibero-American productions</p> <p>25. <i>De brutas nada</i> (series - Mexico) 26. <i>Cómo sobrevivir soltero</i> (series - Mexico) 27. <i>Pan y Circo</i> (series - Mexico) 28. <i>El Candidato</i> (series - Mexico) 29. <i>Home Office</i> (unitary series - Mexico) 30. <i>Homens?</i> (series - Brazil) 31. <i>Impuros</i> (series - Brazil) 32. <i>Sonhadores</i> (series - Brazil) 33. <i>Me Chama de Bruna</i> (series - Brazil) 34. <i>1 Contra Todos</i> (series - Brazil) 35. <i>Dignidade</i> (series - Brazil) 36. <i>Caronte</i> (series - Spain) 37. <i>Desaparecidos</i> (series - Spain) 38. <i>El cid</i> (miniseries - Spain) 39. <i>Inés del alma mía</i> (series – Spain, Chile) 40. <i>Madres</i> (series - Spain) 41. <i>El pueblo</i> (series - Spain)</p> <p>Movistar+ – 10 Ibero—American productions</p> <p>42. <i>Antidistubios</i> (series - Spain) 43. <i>El embarcadero</i> (series - Spain) 44. <i>Justo antes de Cristo</i> (series - Spain) 45. <i>La línea invisible</i> (series - Spain) 46. <i>La unidad</i> (series - Spain) 47. <i>Mira lo que has hecho</i> (series - Spain) 48. <i>Nasdrovia</i> (series - Spain) 49. <i>Skam</i> (series - Spain) 50. <i>Vergüenza</i> (series - Spain) 51. <i>Dime quién soy</i> (series - Spain)</p> <p>Claro Video – 5 Ibero-American productions</p> <p>52. <i>DesHecho en casa</i> (series - Mexico) 53. <i>Orgullo México</i> (series - Mexico) 54. <i>Herederos por Accidente</i> (series - Mexico) 55. <i>Promesas de Campaña</i> (series - Mexico) 56. <i>Manual para Galanes</i> (series - Mexico)</p>	
Total: 12	Total: 56	Total: 2
GRAND TOTAL: 70		

Source: *Obitel Argentina*.

Cablevisión Flow (Grupo Clarín) operates as a space for the distribution of content from the Group's own channels, but mainly from pay TV signals, other on-air channels and exclusive content, whether licensed or originally produced. In 2020, a trend that we had already reported the previous year was consolidated, referring to the licensing of webseries produced in the university environment, particularly from the Universidad de Tres de Febrero (Buenos Aires). Flow has already incorporated at least a dozen webseries produced by the university into its catalog.

Table 7. Premiere fiction in 2020 in VoD: countries of origin.

Country	Titles	%
NATIONAL (total)	12	17,2
OBITEL COUNTRIES (total)	55	78,5
Argentina	12	17,1
Brazil	13	18,5
Chile	1	1,4
Colombia	3	4,2
Spain	23	32,8
USA (Hispanic productions)	0	0,0
Mexico	16	22,8
Peru	0	0,0
Portugal	0	0,0
Uruguay	0	0,0
Venezuela	0	0,0
CO-PRODUCTIONS (total)	3	4,3
Argentine co-productions	2	0,0
Co-productions between OBITEL countries	1	0,0
GRAND TOTAL	54	100,0

Source: Obitel Argentina.

In the VoD platforms observed, fiction from Obitel countries prevails, especially Spain, Mexico and Brazil, where both Netflix and other global services have maintained for some years an intense policy of local content production. Argentina lags behind insofar as local productions generated by international services are still scarce. At the close of this chapter, the global platform had in production stage the second season of the original series *Casi Feliz* and a new production, *El Reino*, both with a release date for 2021.

4. Fiction and Audience Participation in Digital Environments

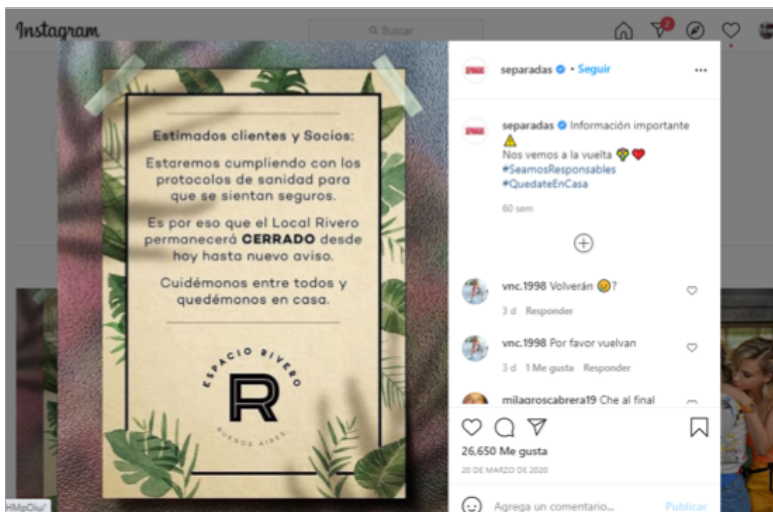
4.1 Digital Expansion Proposals

The already reported drop in the open television audience does not imply an absence of serialized fiction consumption; streaming platforms were the big winners during the pandemic (see above). Although we do not yet have data quantifying the number of viewers who switched from the TV screen to other forms of viewing, in Argentina the arrival of streaming companies has grown, to which are added other state-owned platforms and new more curated proposals such as Retina Latina -Latin American audiovisual-, Mubi -which makes available for a period of thirty days one film per day with an explicit curatorial criteria-, Qubit -according to its own description “the best cinema in the world selected by experts”-, among other platforms. In addition to these, there are spaces that the channels or series themselves provide for the viewing of their productions (YouTube, Facebook, Instagram, etc.). Streaming and video on demand platforms have expanded not only the contents traditionally watched through pay TV, but also the possibility of on-demand viewing of productions released on TV screens. This is the case of Cont.ar, the state-owned streaming platform that operates in parallel with Televisión Pública, but also works as a digital reposi-

tory and at the same time has a pay TV signal. Thus, the proliferation of viewing possibilities of a single national production is multiplied by at least three, not counting the rerun strategies on websites of the television channels themselves, their YouTube channels, etc.

In 2020, El Trece allocates a space on its website for viewing the 36 chapters of *Separadas*, but offers only the chapters, which can also be found on YouTube. On Instagram, the show especially showed photos of the actors and actresses prior to the premiere and then images of the characters in moments in and out of the fiction. In this network, the ending of the show itself was announced in a fictional way, but anchored in the health context of the Covid-19 pandemic, with the closing of the bar that was part of the plot.

Image 1: Last post on the official Instagram profile of the telenovela *Separadas* (El Trece)



Source: Instagram profile @separadas

On the other hand, the case of the third season of *Si solo si* (TV Pública), a fiction series that includes actors with disabilities among its protagonists and has its own website, is very interesting, since its arrival to open television is subsequent to other initiatives. “*Si solo si* is an integrated concept that started in 2012 with a web series and began to evolve into what it is today... a brand that transcends television and is also developed on other platforms. The different products where the concept of *Si solo Si* is reflected are, without a doubt, of a nobility and perseverance that transcends the individual work of its creator, Sebastián Suárez. Teamwork, professionalism and above all passion make *Si solo Si* what it is today and what it will be over time, as the concept is constantly evolving. It highlights the idea of integrated television, which stands out for being the project that kicked off the inclusion of people with disabilities to the public in a massive way, as it is the first fiction series in the history of world television that integrates actors with and without disabilities in its cast”⁹.

Thus, *Si solo si* is present in all social networks, in state platforms such as Cont.ar and, as reported, it was released on the screen of Televisión Pública. In these spaces the subject matter of the story is exceeded, information on the topics of various disabilities is disseminated; on Instagram there were different live events with actors of the series, as well as previews, promotional material and images of the chapters and the backstage. On their website they also have exclusive content such as “kitchen” (where they present videos teaching recipes), a mobile cinema for schools, information about a documentary in preparation, and a book on disability issues made in conjunction with the National Institute against Discrimination, Xenophobia and Racism (INADI).

Of all the transmediality proposals, *Si solo si* becomes the most interesting, given that it not only shares its programming on se-

9 <http://www.sisolosi.tv/productora/quienes-somos>

cond screens, but from these spaces it can summon viewers beyond the screens, offering contents beyond the fiction itself.

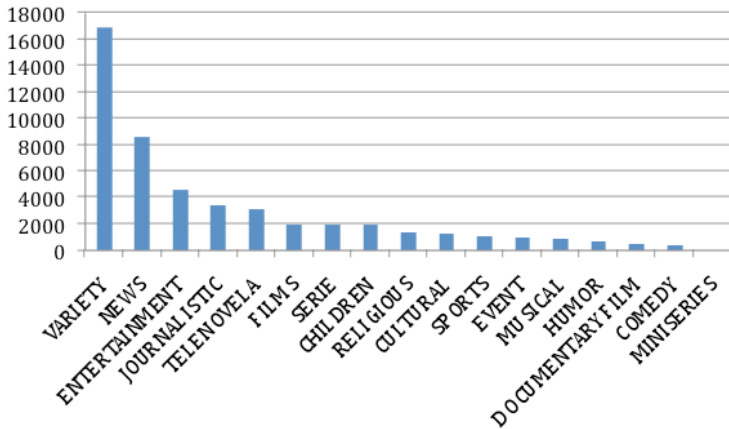
5. Highlights of the Year

Throughout 2020, the highlight of the year was the change in the relative weight of the open television offer. Although, as reported in the previous sections, fiction maintained a space on the television screen (30 reruns in 2020, compared to 3 in 2019), the production of national fiction stopped. This allowed a comeback of other genres such as magazine and entertainment programs. The context of Preventive and Compulsory Social Isolation first and of Social Distancing later, also implied a greater demand for information, and thus a greater television turn-on. As can be seen in the report of the ten most watched fictions, it was not premiere fiction that summoned that returning audience; rather, entertainment and contest programs enjoyed the audience's favor. While the show *100 argentinos dicen* returned to El Trece, *Corte y confección* and *El gran premio de la Cocina* received more broadcasting hours.

On the other hand, Telefe celebrated its 30th anniversary with a successful strategy (and very appropriate to the context), reintroducing on its screen many of the mythical fictions of its history. It was a segment called *30 años juntos* (30 years together), in which episodes of *Casi Ángeles*, *Educando a Nina*, *Los Roldán* and *Atraverse* were broadcasted. Foreign fictions such as *Avenida Brasil*, *¿Qué culpa tiene Fatmagul?* or *Moisés y los 10 mandamientos* were also part of the self-homage. Thus, the screen was filled with familiar narratives and nostalgia.

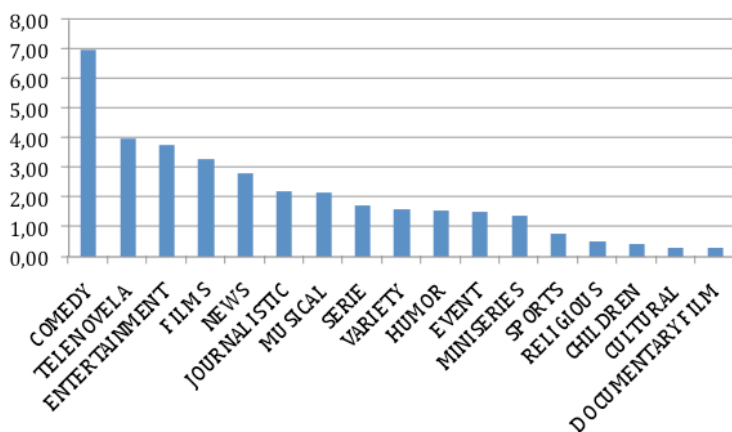
If we observe the distribution of hours by genre, we can see that the number of hours devoted to information in general prevails over the other genres, as well as the prominent place of entertainment.

Graph 4. Number of hours broadcasted by genre



Source: Kantar Ibope Media and Obitel Argentina.

If, on the other hand, we look at ratings by genre, we see that the space of fiction programs in the audience’s preference is preserved, together with a greater interest in information. A relevant fact that allows us to see a possible reconversion of the open television offer is the greater prominence of entertainment programs with an acceptable performance. El Trece, for example, programmed this genre in the evening during the whole year.

Graph 5. Household rating by genre

Source: Kantar Ibope Media and Obitel Argentina.

As for premiere fiction, it is worth noting that four of the five released fictions were programmed in non-commercial spaces. They had an important thematic variety. The aforementioned third season of *Si solo si* shows that disabilities do not make useless individuals; *La persuasión* deals with a paranoid plot, a criticism of the media treatment and use of information; *Terapia en cuarentena*, on the other hand, deals with the quarantine situation as it happens, based on the already known fictional format of the therapy session; finally, *Separadas* was an orchestral story, in which seven women were victims of a real estate fraud. The role of Televisión Pública is interesting since it chose to program premiere fictions with content that goes beyond the fiction space and clear weight of social merchandising; however, and as it usually happens, the spaces in which these fictions were programmed do not manage to attract the audience's attention.

6. Theme of the Year

As pointed out in previous sections, during 2020 Argentine fiction production came to a complete halt. In March, the Preventive and Mandatory Social Isolation is established. Although the change from Isolation to Distancing took place only in November, throughout the year several activities were incorporated with protocols. Until August, all face-to-face activities not defined as essential were suspended. Within this framework, several protocols and good practice recommendations began to be approved due to the Covid-19 pandemic.

In this context, in April -one month after PMSI's first announcement-, El Trece's most important show, *Separadas*, announced its suspension and later its cancellation. We understand that this total paralysis is unprecedented since the beginning of open television in Argentina.

Over the months and the decisions to program foreign fiction, many actors' groups demanded that the open television channels should reinstate national fictions in order to collect for the performing rights, since the sector collapsed abruptly. This crisis also reached the production companies, the most notable case is that of the production company associated to El Trece, Pol-Ka, which in July announced a terminal crisis and the closing of its doors, and had to lay off at the end of the year about fifty percent of its employees (140 dismissals). In this way, the production company, which up to five years ago released on El Trece two daily series per year and a biannual unitary series, avoided bankruptcy.

Also, in an extraordinary way, the exhibition of films in movie theaters and live shows was stopped. In this context, many actors and actresses turned to the production of shows by streaming and from their own homes, either by re-staging filmed theater, or by devising

new forms of production for it. An extreme case was the experience of telephone theater, in which the recipients received audios of the play on their cell phones for several days.

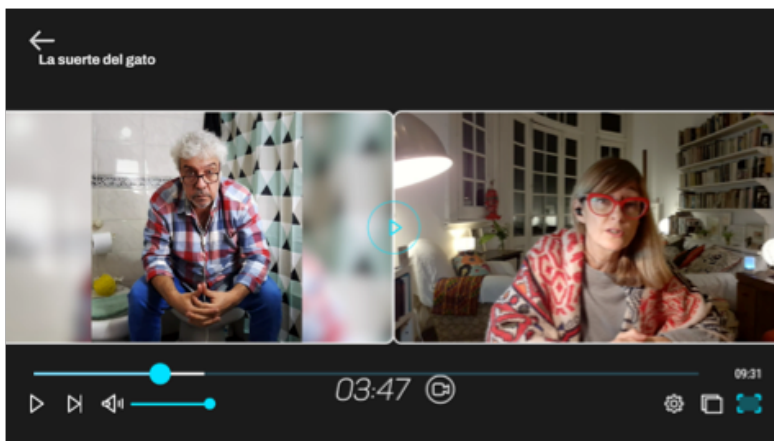
The possibility of producing fiction with the corresponding protocol was submitted to the Executive Power in August by the National Ministry of Culture. It establishes parameters that make audiovisual production almost unfeasible. In addition to the sanitary recommendations, the staggering of tasks to summon as few people as possible for the filming, the general information and preventive sanitary recommendations, temperature controls and swabs, it is established that “The Companies shall take all possible preventive measures so that in all books and/or formats they try to keep the distance between the members of the Artistic Team/Extras/participants as well as the Technical Team and minimize the contact between them, following for each case the indications published by the competent health authorities and the Occupational Risk Prevention Plan specific to each production” (2020:28-9). In this sense, it is not possible to make recordings on location, since the plot makes it necessary for the actors to be at a distance of less than the recommended 2 meters.

Despite these restrictions, one pandemic fiction stands out. It is *Terapia en Cuarentena*, released in August. According to Emanuel Respighi, “Rosario (Mercedes Funes) is a mother who cannot solve -much less enjoy- her motherhood in quarantine. Julio (Coco Sily) is a sixty-something who moved into his mother’s house to take care of her and suffers the coexistence to the point of suffocation. Malena (Violeta Urtizberea) is a doctor who intervenes in the pandemic and the neighbors of the building where she lives want to lynch her for fear of her infecting them. Diego (Luciano Cáceres) is a gay man who cannot stand the confinement, the impossibility of going to the gym and the inactive sexual life imposed by the pandemic. They all suffer the mandatory

preventive social isolation, but they do not know each other. They only share the same therapist, Anita (Carola Reyna), who tries to help them solve their problems through online sessions. That is the relationship scenario of *Terapia en cuarentena*, the only fiction that could be filmed in the country since the sanitary emergency was decreed” (2021).

In the article, Respighi points out that “It was the actual actors and actresses who recorded themselves, but they were assisted and directed remotely by the creative team of the NOS production company. To do so, each of the cast members received -by messenger- a smart cell phone and basic camera and photography equipment, as well as prevention and safety elements (such as masks, alcohol gel, gloves). All this remotely recorded material was finally edited by the production company’s post-production team, with each of the technicians involved also from their homes” (2021).

Image 2: *Terapia en cuarentena* (Televisión Pública)



Source: screenshot. www.cont.ar

An interesting aspect of the only Argentine fiction series filmed in pandemic about the pandemic is that the variety of situations in which the characters find themselves allows the emergence of the various troubles and sensations caused by the isolation, both of those who are facing the health situation and those who live with people at risk, seeing their daily lives and routines altered. These plots are also developed through a very interesting camera set-up. The computer or cell phone camera situation allows the image to “fall”, “freeze”, “pixelate”, turning the therapy device itself into an intriguing space for audiovisual experimentation. The unusual interruption of the sessions thus becomes one of the leitmotifs of the series, which often brings a humorous tone to a distressing situation. This processing of the confinement that *Terapia en Cuarentena* presents as fiction extraordinarily questions its audience as well as their own experiences.

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1 The Obitel Brasil would like to thank Kantar Ibope Media for the information kindly provided and that enabled the analysis presented here.

Introduction

In Brazil, the COVID-19 pandemic engendered the greatest health tragedy in history, exacerbated by the Federal Government's neopolitics. Thereby, Brazil was ranked among the countries with the highest number of deaths from coronavirus. Despite the social suffering, or even because of it, we have observed different actions in the Brazilian audiovisual sector and by its audiences, both in fictions material and in its production and vehiculation. These we called *pandemic formats and resources*.

Therefore, in addition to the usual analyses in this chapter, we intend to highlight what these actions have brought about by comparing the years of 2020 and 2019.

1. Brazil's audiovisual context in 2020

1.1. Open TV in Brazil

The Brazilian television system is composed of seven national networks, of which five are private and two public. Of those, only RedeTV! did not broadcast fiction works in 2020.

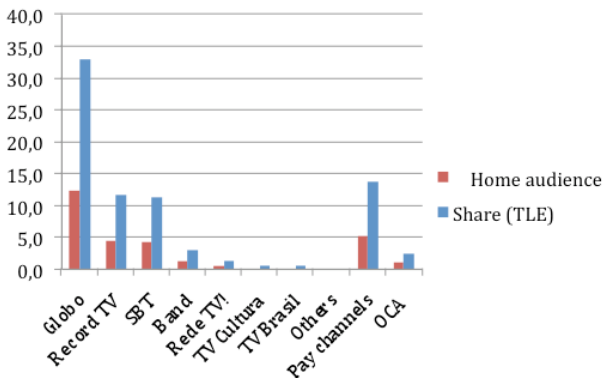
Chart 1. National Open TV broadcasters in Brazil in 2020

Private broadcast / channel (5)	Public broadcast / channel (2)
Globo	TV Brasil
Record TV	TV Cultura
SBT	
Band	
RedeTV!	
TOTAL CHANNELS= 7	

Source: *Obitel Brasil*

Graph 1. TV audience and share by broadcast in 2020²

Channel	Home audience	Share (TLE)
Globo	12.4	32.9
Record TV	4.4	11.8
SBT	4.3	11.4
Band	1.2	3.1
Rede TV!	0.5	1.4
TV Cultura	0.3	0.7
TV Brasil	0.2	0.6
Others ²	0.2	0.4
Pay channels	5.2	13.8
OCA ³	0.9	2.4
TOTAL	29,5	–

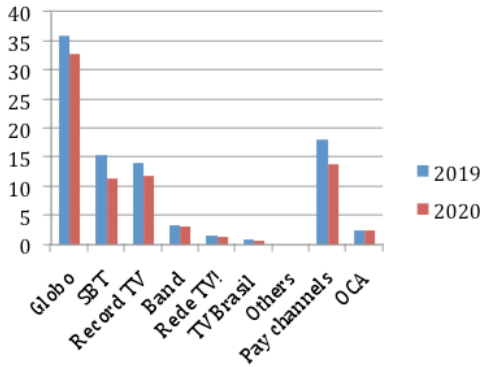


Source: Kantar Ibope Media – Media Workstation – 15 Market³

² Others: Record News, TV Câmara, TV Justiça, TV Senado.

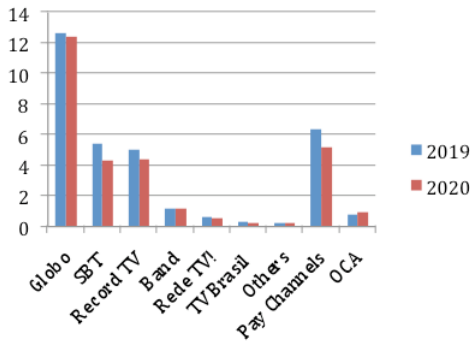
³ OCA: *Outros Canais Abertos* (Other Open Channels) that have not individual published audience.

Graph 1.a. Home audience comparative 2019/2020



Source: *Obitel Brasil*

Graph 1.b. Share (TLE) Comparative 2019/2020



Source: *Obitel Brasil*

Data suggest stability of Open TV audience, which maintained 93.3% of audience relating the previous year⁴. Still, following a trend observed in 2019, the Brazilian TV audience was down 2.9 points.

In Open TV audience, Globo had a drop of 0.3 points, but it still remains leading. Record TV overcame SBT and, despite a loss

4 From 2019 to 2020, open TV reported a 1.7 audience points drop, falling from 26.0 to 24.3.

of 0.6 point in 2019, is now the vice-leader. SBT recorded a loss of 1.1 point and moved into third place. About the share of television channels (TLE, also known as “pure TV audience”) a general drop is observed in Open TV. Globo, SBT and Record TV had drops around 2 to 4%.

The audience of Pay TV reported a great drop of 18.1% compared to 2019. Overall, the sum of pay channels dropped from 6.4 to 5.2 - a loss of 1.2 point, and, about share, drop was 4.2%.

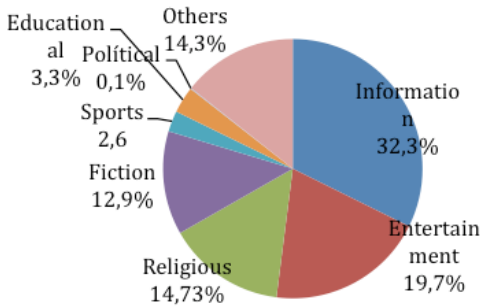
Regarding media penetration⁵, audience dropped 2.6% for Pay TV, 1.1% for magazines, 1.0% for newspapers and 0.9% for Open TV. On the other hand, Internet had an 1.1% increase, while the increase for extensive media was 1.2%. Since 2019, Internet was consolidated as the most consumed media among Brazilians, outweighing the Open TV.

Graph 2. Genres and hours broadcast on TV programming in 2020⁶

Genres channel	Hours of exhibition	%
Information	33026.8	32.3
Entertainment	20106.9	19.7
Religious	15043.8	14.8
Fiction	13198.3	12.9
Educational	3376.7	3.3
Sports	2656.7	2.6
Political	105.6	0.1
Others	14636.3	14.3
Total	102.151.1	100.0

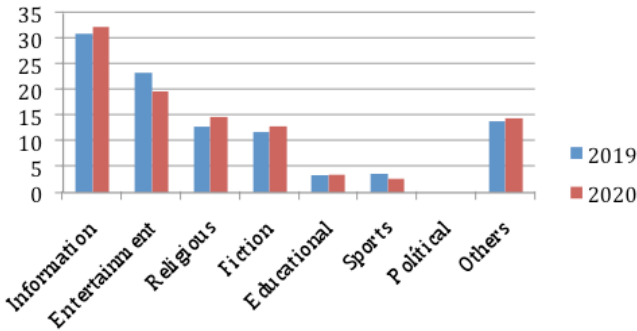
5 Media penetration index from 2019 to 2020: Open TV, 86.1 to 85.2%; extensive media, 82.5 to 83.7%; Internet, 86.1 to 87.2%; radio, 58.8 to 57.2%; pay TV, 37.5 to 34.9%; newspapers, 12.0 to 11.0%; cinema, 14.8 to 15.4%; and magazines, 9.8% to 8.7%.

6 Genres: Information: debate, documentary, interview, journalism, report; Entertainment: talk show, cars and engines, gastronomy, female, game show, comedy show, children cartoon, fashion and beauty, musical, awards, reality show, performance; Sports: sports, football; Fiction: telenovela, film, miniseries, series, adult cartoon; Others: not listed, rural, health, sweepstakes, shopping channels, travel and tourism; educational; political; religious.



Source: Kantar Ibope Media – Media Workstation – 15 Markets

Graph 2.a. Genres broadcast comparative 2019/2020



There were no significant changes in the ranking of the most broadcast genres on the TV grid in 2020. Information and Entertainment continue as the main ones (52%). The Religious genre had the largest percentage increase (1.9%) and follows the growing occupation of the TV grids by Pentecostal churches that currently mark their presence in the federal government. The in-

crease of Fiction content (1.1%) in the Open TV grid does not go unnoticed, despite the interruption of shooting due to the coronavirus. This increase may be attributed to greater consumption of this genre during domestic confinement and to the expressive audience won over by reruns.⁷

1.2. Pay TV and VoD in Brazil

In 2020, the number of Pay TV consumers in Brazil was 14 million, approaching the December 2019 index and matching the level recorded for 2012.⁸ Among the causes for the decline of Pay TV, we could mention: competition with Over-The-Top (OTT)⁹ services, improved video quality of open channels with Digital TV, and lower purchasing power in the country.

Chart 2 - Pay TV in Brazil

Pay TV Channels
1) Canal Viva (fiction reruns), 2) Globo News (news), 3) Cartoon Network (child), 4) Discovery Kids (child), 5) Discovery Channel (documentary), 6) Megapix (films), 7) Universal TV (series), 8) Sport TV (sport), 9) AXN (series), 10) Gloob (child), 11) Discovery Home &Health (documentary), 12) Multishow (varieties), 13) TNT (films), 14) Nickelodeon (child), 15) Star Channel (series/films), 16) Space (films), 17) Warner (films), 18) Telecine Pipoca (films), 19) Telecine Action (films), 20) TNT (films)

Source: Kantar Ibope Media

7 We will further resume the phenomenon of the repercussion of prime time reruns on the audience.

8 Cf. <https://bit.ly/3xxzqCq>

9 Content distribution by the Internet.

We considered the 20 most watched Pay TV channels to identify the premiering Brazilian fiction. The Universal TV, with the second season of the medical series *Unidade Básica* (Gullane Filmes, 2020), ranks among the 10 top audiences. From the 11th to the 20th ranking, only two channels have aired premiering Brazilian fiction: Multishow with the third seasons of *Os Roni*, (V8/Formata, 2020), and *Dra. Darci* (Formata, 2020). The Star Channel, in turn, exhibited the fourth season of the International Emmy nominee police drama *Um contra todos* (FIC/Conspiração Filmes, 2020).

Chart 3 - VoD in Brazil

Types	Platforms	Total
VoD linked to Open TV	Globoplay (Globo), SBT Videos (SBT), PlayPlus (Record), EBC Play (TV Brasil), Sara Play (TV Gêneseis)	5
VoD linked to Pay TV	AXN, Sony Channel, NOW NET and Claro, WatchESPN, Discovery Kids Plus, Globo Channels, Gloob Play, Box Brazil Play, Fox Play, Fox Sports, TNT Go, TCM Play, HBO GO, Cartoon Network, Rá Tim Bum Play, A&E Play, EI Plus, FishTV, History Play, Tamanduá TV, Arte1 Play, Premiere, SKY Play, Telecine Play, A&E Brasil Channel (YouTube), Lifetime Brasil Channel (YouTube), CineBrasil Já, Combate Play, Noggin, Pluto TV, Directv GO	31
VoD linked to telecommunications companies	Claro Video, Apple TV Plus, Oi Play, Vivo Play, VID+ (Algar Telecom), Brisa Play (Brisa Net), Now Online (Claro)	7

Types	Platforms	Total
VoD not linked to TV networks	Afrolix, Prime Video, Babidiboo.Tv, Pluto TV, Crackle, Crunchyroll, Enter Play, Google Play, LibreFlix, Looke, Microsoft Movie and TV, Mubi, My French Filme Festival, NBA TV, Netflix, Oldflix, Smart VOD, Univer, Vevo, Videocamp, Vimeo, Youtube, O2 Play, Sot.TV, Dazn, Estadio TNT Sports, À La Carte, Apple TV +, Box Brasil Play, Vix Films and TV, Uol Play, Crunchy, Roll, Inff Online, Filme, Samsung TV Plus, Supo Mungan Plus, Disney+, Quibi, SPCine Play, Netmovies, Vix Cine TV, StarzPlay (Lionsgate), SPCine Play, Kinopop, Darkflix, Cinema Virtual	47
TOTAL		90

Source: *Obitel Brasil*

The VoD scape in Brazil was marked by the increased number of users and the trend toward channel aggregation, as is the case of Globoplay, which absorbed two Pay TV channels, BIS and Multishow, reaching the milestone of 20 million unique users, against 17 million of Netflix¹⁰, becoming the streaming leader in Brazil. The arrival of Disney+ in Brazil in partnership with Globoplay made available a subscription package of both platforms for an amount lower than the subscription of each streaming individually. Another highlight is the availability of old telenovelas (called “classic”) from TV Globo on Globoplay, since May 2020.

The releases of the free platforms, Pluto TV and Vix Filmes e TV - which exhibit series, movies, documentaries and other audiovisual products - pointed to a cost-free business model for users.

10 Cf. <https://bit.ly/3gM4veS>. Accessed on November 23, 2020.

1.3. Independent television fiction producers

In 2020, the Brazilian Film Agency – Ancine (*Agência Nacional de Cinema*) recorded 8,651 independent producers in Brazil, an 0.7% drop, i.e., 68 producers. Their participation in the production of national fiction works to the free-to-air TV fell by half, from 31 (65%) to 10 (31%). Likewise, the exhibition of Brazilian works produced or co-produced by independent producers has also dropped: from 28 (2019) to only 9 (2020), i.e., 321% less. This scenario intensely reflects the Bolsonaro administration's cuts in public policies of fostering audiovisual industry.

About Pay TV, in 2020, national titles produced or co-produced by independent producers totaled 14, a 56% drop in relation to 2019, when there were 25 titles. In opposition, in 2020, we observed in VoD a trend toward an increase of 15%: there were 23 titles, compared to the 20 titles of the previous year, which counted with the participation of these producers.

Contrary to previous years, O2 Filmes¹¹ was not among the main producers of TV fiction, and the list appeared more balanced. Tied, with two titles each, are Boutique Filmes (*Onisciente* and *3%*, both exhibited on Netflix); Gullane Filmes (*Unidade Básica*, broadcast on Universal TV and *Boca a Boca*, on Netflix); Conspiração Filmes (*Um Contra Todos*, co-production with FIC exhibited on FOX, and *Reality Z*, on Netflix); Casablanca (*Jesus* and *Amor Sem Igual*, produced for Record TV); Formata (*Os Roni* co-production with V8, and *Dra. Darci*, both aired by Multishow and Globoplay).

11 In 2019, O2 Filmes led with 6 national titles.

1.4. The audiovisual sector sources of funding

Private investment in media advertising was R\$145 billion in 2020. The 15% decline in investment in the pandemic year brought the amount back closer to the 2018 level. The biggest beneficiaries were Open TV with R\$72 billion (49%), and Pay TV with R\$17 billion (12%). Commerce, consumer service companies, and banking were the main advertiser sectors, in addition to official government advertising.

The merchandising of telenovelas, which in recent times gained relevant place on the Brazilian TV, was interrupted in its productions in March 15, 2020, causing a drop of 17% Globo's advertisement-related revenues.¹² However, an advertisement action in the telenovela *Amor de Mãe* (2019/20/21), which transformed the character Ryan into a telephone operator employee, was worth of notice.

The pandemic seems to have prompted vehicles, advertisers and agencies to find new formats.¹³ As productions were suspended, the social merchandising operations were on themes presented by reruns that rekindled debates in Brazil. In the day time slot, the program *Vale a Pena Ver de Novo*¹⁴ exhibited again the telenovela *Laços de Família* (2000), which supported blood and bone marrow donation through the story of a main character with leukemia. The telenovela *A Força do Querer* (2017), re-aired in prime time, approached transsexualism topic by showing the transition of a character through surgery and self-application of hormone.

12 Cf. <https://bit.ly/3zKNNp8>.

13 Cf. <https://bit.ly/2TLBLLm>.

14 The program *Vale a Pena Ver de Novo* (*Worth Seeing Again*) re-airs old telenovelas on the TV Globo day time schedule

1.5. Communication Policies

The pandemic made clear the central role of telecommunications in Brazil, and the need for more investment in infrastructure¹⁵. At the federal government level, besides the recreation of the Ministry of Communications, the year was marked by discussions about a new legal framework for both Pay TV (Law 12.485/2011) and VoD¹⁶. Despite that, the debates continued with no further updates.

Among the difficulties toward ruling the Internet economic agents - who provide similar services to operators, but without regulation and action by the State¹⁷ - the vagueness about which services and activities can be classified as telecommunications stands out. The challenge is to match the traditional regulated environment with the current model that emerges in a disruptive manner. Some habits acquired during the pandemic such as online classes, telework and home office, are here to stay, urging for more infrastructure and evidencing the relevance of the telecommunications sector for the smooth functioning of essential activities of society.

Within this scenario of asymmetry and challenges, the governmental effort toward passing a law that creates new models for the sector and changes several clauses in the *Lei Geral das Telecomunicações*¹⁸ (Telecommunications General Law) has flagged the interest of the State in updating operations and legislation. The audiovisual sector was marked by crises, fragilities and institutional uncertainties that existed since before the pandemic. Besides the threats of a possible merger of the National Telecommunications Agency (*Agência Nacional de Telecomunicações, Anatel*) with

15 Cf. <https://bit.ly/35LtaLP>. Accessed on October 20, 2020.

16 Cf. <https://bit.ly/3zwCRvf>.

17 Cf. <https://bit.ly/3xwoKEd>.

18 Cf. <https://bit.ly/3wF7k8u>.

the National Film Agency (Ancine), the sector suffered with deliberate cuts in funds for projects already approved, and with the announcement of shortage of federal financial resources to meet investment commitments assumed by the Audiovisual Sector Fund (*Fundo Setorial do Audiovisual*, FSA).¹⁹ The dismantling of Ancine and public policies that promote the audiovisual sector have interrupted at least 700 ongoing productions.

In the midst of the coronavirus crisis, the government left its mark on the Brazilian audiovisual, mainly characterized by scrapping, lack of funding and of public incentive.

1.6. Infrastructure of digital and mobile connectivity

The pandemic placed the digital environment on the center stage. The Information and Communications Technologies (ICT) become the main tools for communication and information, work, public service provision (including education and health), commerce, entertainment and leisure.

As a result, Brazilians' access to and use of the Internet is increasing and new digital habits are being rapidly adopted²⁰. In the year, computer and notebook-based Internet connections increased around 9% against 2019. The use of digital television, which was already on the rise, recorded a growth of about 18%. Cell phone remains the prevailing means of Internet access for

19 Cf. <https://bit.ly/3zF8e6W>.

20 Cf. Panel ICT COVID-19: Research on internet use in Brazil during the new coronavirus pandemic. 1st edition: internet activities, culture and e-commerce. Regional Center for Studies for the Development of the Information Society. 2020. Retrieved from: <https://bit.ly/3xtYevc>.

98% of the people. As for the connectivity network, the use of WiFi networks is favored over mobile data connections (3G and 4G). The most common activities in the digital environment are: messaging (97%); social media (93%); audiovisual products (90%) or music (86%); and voice or video calls (84%)²¹. The consumption of streaming and VoD services is also increasing: 43% of Internet users stated to pay for digital services of movies or series.

2. Analysis of the year: Brazilian and Iberian-American premiere fiction

Table 1. Fiction aired in 2020 (national and imported; premieres and reruns; co-productions)

<p>NATIONAL PREMIERE TITLES: 23</p> <p>Globo - 15 national titles</p> <ol style="list-style-type: none"> 1. <i>A Divisão</i> (series - release episode, VoD premier) 2. <i>Amor de Mãe</i> (telenovela) 3. <i>Amor e Sorte</i> (series) 4. <i>Arcanjo Renegado</i> (series - release episode, VoD premier) 5. <i>Aruanas</i> (series, VoD premier) 6. <i>As Five</i> (release episode, VoD premier) 7. <i>Bom Sucesso</i> (telenovela) 8. <i>Diário de um Confinado</i> (series-. episodes start in VoD) 9. <i>Éramos Seis</i> (telenovela - partial VoD premier) 10. <i>Falas Negras</i> (single episode)
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21 Cf. CGI.br/NIC.br, Regional Center of Studies for the Information Society Development (*Centro Regional de Estudos para o Desenvolvimento da Sociedade da Informação*, Cetic.br), Survey on the use of Internet in Brazil during the new coronavirus pandemic - ICT COVID-19 Panel (*Pesquisa sobre o uso da Internet no Brasil durante a pandemia do novo coronavírus - Painel TIC COVID-19*) - 3rd Edition.

NATIONAL PREMIERE TITLES: 23

11. *Gilda, Lúcia e o Bode* (single episode)
12. *Hebe* (miniseries, starts in VoD)
13. *Malhação – Toda Forma de Amar* (telenovela-
starts partially in VoD) – 27th season
14. *Salve-se Quem Puder* (telenovela)
15. *Sob Pressão – Plantão Covid* (series)

TV Cultura - 6 national titles

16. *Boto* (series)
17. *Crias de Dulcina* (series)
18. *Os Ovos da Raposa* (series)
19. *Pequeno Gigante* (series)
20. *Sacoleiras S/A* (series)
21. *Transviar* (series)

Record TV – 1 national title

22. *Amor sem Igual* (telenovela)

SBT – 1 national title

23. *As Aventuras de Poliana* (telenovela)

CO-PRODUCTION TITLES: 0

PREMIERE IMPORTED TITLES: 4

SBT – 3 imported titles

24. Ugly Betty in New York (telenovela – USA)
25. Cuando me Enamoro (telenovela – Mexico)
26. Triunfo del Amor (telenovela – Mexico)

Band – 1 imported title

27. Ouro Verde (telenovela – Portugal)

NATIONAL RERUN TITLES: 25

Globo - 11 reruns

28. A Força do Querer- Special Edition
(telenovela)
29. Cine Holliudy (series)
30. Êta Mundo Bom (telenovela)
31. Fina Estampa – Special Edition (telenovela)
32. Flor do Caribe – Special Edition (telenovela)
33. Haja Coração – Special Edition (telenovela)
34. Malhação – Viva a Diferença – Special Edition
(telenovela) – 25th season
35. Novo Mundo - Special Edition (telenovela)
36. O Auto da Compadecida (miniseries)
37. Tapas & Beijos (series)
38. Totalmente Demais – Special Edition
(telenovela)

Record TV – 7 reruns

39. A Escrava Isaura (telenovela)
40. Apocalipse – Special Edition (telenovela)
41. Caminhos do Coração (telenovela)
42. Escrava Mãe (telenovela)
43. Jesus (telenovela)
44. O Rico e Lázaro – Special Edition (telenovela)
45. Os Mutantes – Caminhos do Coração
(telenovela)

SBT – 5 reruns

46. Abismo de Pasión (telenovela – Mexico)
47. Chiquititas – Special Edition (telenovela)
48. Cúmplices de um Resgate (telenovela)
49. Mi Corazón es Tuyo (telenovela - Mexico)
50. Lo que la Vida Me Robó (telenovela – Mexico)

Band – 1 rerun

51. Floribela (telenovela)

TV Brazil - 1 rerun

52. O Vigilante Rodoviário (series)

TOTAL PREMIERE TITLES: 27

TOTAL RERUN TITLES: 25

TOTAL TITLES SCREENED: 52

Brazil screened a total of 52 titles, corresponding to 73% of the titles screened in 2019 (71) and a 27% drop from the previous year. Of that total, 52% were premiere titles and 48% reruns. Since the *Obitel* historical data series, began in 2008, there has never been a single year in which the number of reruns was so close to that of premieres. In 2020, however, premiere titles were 27 and reruns were 25, which means that for 10 premiere titles, 9 were reruns.

Brazil recorded a 52% drop in the number of premiere national titles, partly because of the suspension of recordings caused by the health crisis. Compared to the previous year, there were 23 fictions against 48 aired in 2019. The reruns, on the other hand, had an increase: 25 against 19 in the previous year. It is worth noticing that 40% of reruns were screened to fill the gap of the suspended works.

Globo, the main producer of national fiction, put on hold the recording of all its fictions due to the pandemic. The telenovela *Amor de Mãe* that was on air was interrupted on March 15, 2020. The telenovelas *Fina Estampa* (2011) and *A Força do Querer* (2017), were successively scheduled to replace that in the “Special Edition” format.²²

The “Special Edition” format deserves some special comments, since it is an operation created during the pandemic, and because it has been adopted in the main fictional productions of the prime time.

“Special Edition” was the term adopted by Globo, incorporated into the very title of the telenovela, and which we call *pan-*

22 We noticed that Globo continued to adopt this format in 2021 with the rerun of *Império* (2014) at the prime time. This is expected to continue while Globo cannot provide sufficient health guarantees to produce and launch a new premiere fiction.

demic format of prime time reruns. The original story underwent some interventions so as to be closer to the current formats, with shorter scenes and twists quickly triggered. This also implied a reduction in the number of chapters.

For illustration purposes, we present two reruns of the 9 pm time slot with data of this new format.

About *Fina Estampa*

- 1) number of chapters of the original telenovela: 185
- 2) number of chapters of the rerun telenovela: 155
- 3) start and end date of the rerun telenovela: March 23 to September 18, 2020
- 4) audience of the original telenovela: 35.4
- 5) audience of the rerun telenovela: 30.99

About *A Força do Querer*

- 1) number of chapters of the original telenovela: 172 chapters
- 2) number of chapters of the rerun telenovela: 149 chapters
- 3) start and end date of the rerun telenovela: September 21, 2020 to March 12, 2021
- 4) audience of the original telenovela: 40.1
- 5) audience of the rerun telenovela: 26.03

In April 2020, Globo only broadcast reruns of telenovelas and series previously launched on Globoplay, but unreleased on open TV channel, such as *Aruanas* and *Hebe*.²³ As a result, Globo delayed by almost a year²⁴ the premiere of its scheduled telenovelas. During the year, four fictions with *pandemic formats* premiered:

23 The situation endured until July, when Globo premiered *Diário de um Confinado*- the first pandemic fiction screened.

24 Cf. <https://bit.ly/3q5tCOF>.

Amor e Sorte (antologic series); *Diário de um Confinado* (sitcom); *Sob Pressão. Plantão Covid* (two special episodes of this series); e *Gilda, Lúcia e o Bode* (single episode) a year end special program.

The other channels, SBT and Record, also had a drop in the production of television fiction, each screening only one new national title along the year. Record, which had to put on hold the premiere of its new biblical telenovela, *Gênesis*²⁵, until January 2021, screened five less fictions in relation to 2019, and SBT, two less. The figures for imported productions remained at the same level as the previous year and, as in 2019, in 2020 these broadcasts had not screened co-productions.

Following the same trend, the programming schedule of public televisions was affected as well. TV Brasil, which in 2019 had recorded four premieres, did not premier any program in 2020, but rebroadcast, in an unprecedented bet, the series *O Vigilante Rodoviário*, a pioneering Brazilian audiovisual production that was a hit of the former TV Tupi in 1962. TV Cultura, in turn, presented a drop of three fictions, going from nine to six in relation to 2019.

We highlight the continuity of the dialogue between open TV and VoD regarding the distribution of television content: eight fictions, i.e., 34.8% of the premiered national titles elected the streaming platforms as their first window of exhibition. Of these, four fictions aired only a few episodes via broadcasting, with full episodes being made available on VoD. The series were: *Arcanjo Renegado*, *Diário de um Confinado*, *As Five* and *A Divisão*, all launched by Globoplay in 2020.

25 Scheduled to be aired in April 2020 the recording of *Gênesis* were suspended in mid-March and only resumed in the second half of October.

Table 2: Fiction Premiered in 2020: Country of Origin

Country	Titles	%	Chapters / Episodes	%	Hours	%
NATIONAL (total)	23	85.2	653	57.4	416: 07	50.0
OBITEL COUNTRIES (total)	4	14.8	485	42.6	416: 23	50.0
Argentina	0	0.0	0	0.0	0: 00	0.0
Brazil *	23	85.2	653	57.4	416: 07	50.0
Chile	0	0.0	0	0.0	0: 00	0.0
Colombia	0	0.0	0	0.0	0: 00	0.0
Spain	0	0.0	0	0.0	0: 00	0.0
USA (Hispanic production)	1	3.7	135	11.9	133: 52	16.1
Mexico	2	7.4	154	13.5	146: 56	17.6
Peru	0	0.0	0	0.0	0: 00	0.0
Portugal	1	3.7	196	17.2	140: 31	16.9
Uruguay	0	0.0	0	0.0	0: 00	0.0
Venezuela	0	0.0	0	0.0	0: 00	0.0
CO-PRODUCTIONS (total)	0	0.0	0	0.0	0: 00	0.0
Brazilian co-productions	0	0.0	0	0.0	0: 00	0.0
Obitel countries' co-productions	0	0.0	0	0.0	0: 00	0.0
TOTAL	27	100.0	1.138	100.0	832: 30	100.0

Source: *Obitel Brasil*

The number of chapters / episodes of the Brazilian productions registered drastic drop of 68.5% and of 68% in the num-

ber of screening hours compared to 2019, due to the recording cancel from March 2020.

However, 2020 was not characterized only by drops: there was an increase of 31.1% in the number of chapters/episodes of Ibero-American titles, and of 84.7% of screening hours compared to the last survey. That is because, unlike the previous year, only telenovelas – long serial format - were imported. The nationalities of the imported productions remained similar to the previous year, two being of Mexican origin and one Portuguese. The novelty was the American *Ugly Betty in New York*, a Hispanic production aimed at the Latino audience.

Table 3: Formats of national and Ibero-American fiction

Format	National						Ibero-American					
	Title s	%	C/ E	%	H	%	Title s	%	C/E	%	H	%
Telenovela	6	26.1	493	75.5	339:35:00	81.6	4	100.0	485	100.0	416:23:00	100.0
Series	9	39.1	73	11.2	34:10:00	8.2	0	0	0	0	0:00	0.0
Miniseries	1	4.3	10	1.5	7:47	1.9	0	0	0	0	0:00	0.0
TV film	0	0	0	0	0:00	0	0	0	0	0	0:00	0.0
Single Episode	2	8.7	2	0.3	1:40	0.4	0	0	0	0	0:00	0.0
Docudrama	0	0	0	0	0:00	0	0	0	0	0	0:00	0.0
Others (soap opera, etc.)	5	21.7	75	11.5	32:55:00	7.9	0	0	0	0	0:00	0.0
Total	23	100.0	653	100.0	416:07:00	100	4	100	485	100.0	416:23:00	100.0

Source: Obitel Brasil

For the fourth consecutive year, the production of series was higher than that of telenovelas. In 2020, short serial formats (series and miniseries) account for 43% of the total premiere national fiction screened on open TV. But diversification in production formats was lower, with the absence of docudramas and TV films.

Unlike 2019, when the offer of Ibero-American titles included telenovelas and series, in 2020 only telenovelas (4) were imported. On the other hand, it is worth noting the significant number of hours that these Ibero-American productions occupied in the television programming, reaching the same level of hours as the national releases, while in 2019 they occupied only 15% of the total screening time. Moreover, this total number of hours indicates much longer duration of imported telenovelas in comparison with the Brazilian ones.

Table 4: Top ten watched titles

	Title	Channel	Country of origin of the original idea or script	Format/Genre	No. of chap./ep (in 2020)	Time slot	Rating	Share
1	<i>Fina Estampa, Special Edition</i>	Globo	Brazil	Telenovela / drama	155	Prime time	31.0	48.6
2	<i>Amor de Mãe</i>	Globo	Brazil	Telenovela / drama	70	Prime time	29.8	48.1
3	<i>Bom Sucesso</i>	Globo	Brazil	Telenovela / romantic comedy	22	Prime time	29.1	49.8
4	<i>Totalmente Demais, Special Edition</i>	Globo	Brazil	Telenovela / romantic comedy	166	Prime time	29.1	45.6

	Title	Channel	Country of origin of the original idea or script	Format/Genre	No. of chap./ep (in 2020)	Time slot	Rating	Share
5	<i>Salve-se Quem Puder</i>	Globo	Brazil	Telenovela / romantic comedy	54	Prime time	28.0	45.7
6	<i>A Força do Querer, Special Edition</i>	Globo	Brazil	Telenovela / drama	88	Prime time	26.5	43.7
7	<i>O Auto da Compadecida</i> Rerun	Globo	Brazil	Miniseries	4	Night	25.0	45.3
8	<i>Haja Coração, Special Edition</i>	Globo	Brazil	Telenovela / romantic comedy	70	Prime time	23.0	39.2
9	<i>Éramos Seis</i>	Globo	Brazil	Telenovela / drama	76	Evening	22.3	40.3
10	<i>Éta Mundo Bom</i> Rerun	Globo	Brazil	Telenovela / romantic comedy	100	Evening	22.1	43.2
Total productions: 10				Foreign scripts:				
100%				0%				

Source: Kantar Ibope Media - 15 markets and *Obitel Brasil*

In the pandemic year, the list of the top 10 most watched titles is completely unprecedented, as it consists more of reruns (5) than premieres (4).²⁶ In 2019, all the productions in the ranking were unreleased. Note that these premieres in 2020 indicate the number of chapters that had been aired when all recording were put on hold due to COVID-19. The table shows the rerun titles chosen by Globo to fill the grid throughout the year, and that reached the top ten: *Fina Estampa Special Edition*; *Totalmente Demais Spe-*

26 What has neither changed nor is a novelty is the fact that the list is occupied entirely by Globo productions.

cial Edition; A Força do Querer Special Edition; Haja Coração Special Edition. Four reruns are “Special Edition”²⁷, and one of these, *Fina Estampa, Special Edition*, is ranked the first. We want to note that the second place, the unreleased telenovela *Amor de Mãe*, will be our case study for the Theme of the Year topic.

Telenovela remained the most present format on open TV in 2020. Among the 10 most watched titles, nine are telenovelas and one is miniseries.

Compared to the previous year’s data, the audience ratings showed a slight increase, except for the first place in the ranking. At the top of the table, the rerun of *Fina Estampa* reached 31 points, just below the premiered *A Dona do Pedaço* in 2019 - which earned 34 points. Even so, it was a surprising score for a rerun.²⁸ The remaining nine titles had more audience than those of 2019, when the last four positions reached the lowest ratings within Obitel’s historical data series, averaging 20.9 points. In 2020, in turn, the last four titles in the top ten averaged 23.1 points, a recovery of the open-to-air TV audience in the year marked by the pandemic.

27 We have already explained the meaning of “Special Edition” as being a pandemic format of reruns.

28 Reruns bear a special meaning within the “telenovela culture” historically built in Brazil. They go beyond just re-watching and, making a pun on a program name, we claim these reruns are “worth watching again” (which is the literal translation of the program *Vale a Pena Ver de Novo*).

Table 5: Audience profile of the top ten titles: gender, age, socioeconomic level

Titles		Channel	Gender %		Socioeconomic level %		
			Women	Men	AB*	C*	DE*
1	<i>Fina Estampa, Special Edition</i>	Globo	62.5	37.5	28.2	50.2	21.6
2	<i>Amor de Mãe</i>	Globo	62.9	37.1	30.1	49.5	20.5
3	<i>Bom Sucesso</i>	Globo	65.0	35.0	27.8	50.1	22.0
4	<i>Totalmente Demais, Special Edition</i>	Globo	64.3	35.7	25.3	51.3	23.4
5	<i>Salve-se Quem Puder</i>	Globo	65.5	34.5	27.3	50.6	22.1
6	<i>A Força do Querer, Special Edition</i>	Globo	62.2	37.8	25.0	52.3	22.6
7	<i>O Auto da Compadecida Rerun</i>	Globo	60.0	40.0	27.2	49.4	23.4
8	<i>Haja Coração, Special Edition</i>	Globo	63.8	36.2	23.9	52.4	23.7
9	<i>Éramos Seis</i>	Globo	66.8	33.2	28.7	49.8	21.4
10	<i>Êta Mundo Bom Rerun</i>	Globo	64.3	35.7	23.6	51.3	25.2

Titles		Channel	Age Group %					
			4-11	12-17	18-24	25-34	35-49	50+
1	<i>Fina Estampa, Special Edition</i>	Globo	5.4	4.9	6.9	12.2	23.8	46.8
2	<i>Amor de Mãe</i>	Globo	5.5	4.7	7.1	12.6	24.1	46.0
3	<i>Bom Sucesso</i>	Globo	5.9	5.0	6.8	11.7	22.8	47.8
4	<i>Totalmente Demais, Special Edition</i>	Globo	6.1	5.5	6.8	12.0	23.0	46.6
5	<i>Salve-se Quem Puder</i>	Globo	6.0	5.4	7.1	12.0	22.9	46.6
6	<i>A Força do Querer, Special Edition</i>	Globo	5.4	5.0	7.0	12.8	24.0	45.8
7	<i>O Auto da Compadecida</i> Rerun	Globo	6.5	6.1	7.8	14.2	25.2	40.2
8	<i>Haja Coração, Special Edition</i>	Globo	5.7	4.9	6.2	11.9	23.0	48.2
9	<i>Éramos Seis</i>	Globo	5.5	5.0	6.9	11.3	21.8	49.5
10	<i>Éta Mundo Bom</i> Rerun	Globo	6.1	5.8	7.4	11.6	23.0	46.3

Source: Kantar Ibope Media - 15 markets

Women continue to be the main audience of the top ten fictions, mostly at 6pm and 7pm time slot, as can be seen with *Éramos Seis*, *Salve-se Quem Puder* and *Bom Sucesso* (all premiere titles). The favorite fictions of the male audience, on the other hand, continue to be the top prime time telenovelas and the series shown after the 9 pm fictions - here, *O Auto da Compadecida*

(rerun), which recorded the highest concentration of the C class viewers with 50+ years old. The DE class maintains preference for the romance and comedy genres, while the AB class prefers drama. As for the age group, the audience of 50 + years was the one that most watched the top ten fictions, with highlight to the 6pm and 7pm time slot intrigues that privileges melodramatic matrices, such as *Haja Coração, Special Edition* and *Éramos Seis*. The 25 to 49 years old viewers, on the other hand, has preference for the 9pm telenovelas, in this case, *Amor de Mãe, A Força do Querer, Special Edition* and *Fina Estampa, Special Edition*.

3. VoD Monitoring

The year of 2020 was marked by the consolidation of streaming platforms in the

Brazilian audiovisual and by the increased number of users²⁹. On the other hand, the Brazilian audiovisual scenario faces a serious crisis resulting from the pandemic and cuts in government funding. This has created a complex and ambivalent scenario in which coexist, on the one hand, the 61% increase of unreleased national productions in VoD and, on the other hand, the interruption or cancellation of many other audiovisual projects.

3.1. VoD platforms market

Platforms have become very fast a consumption habit especially among youth³⁰. Globoplay, Netflix and Prime Video have

29 Netflix alone had 17 million subscribers in 2020, 7 million more than in 2019, a 70% growth in one year.

30 Cf. <https://bityli.com/0qXSsw>

reached historic numbers of subscribers and revenues. Globoplay leads the national market with 20 million users³¹, followed by Netflix with 17 million subscribers and Prime Video with 10 million.

Globoplay, Globo Group's streaming service, ended the first half of 2020 with 150% more subscribers compared to the previous year. Growth strategies have been varied and innovative, based on logics of combination and diversification ("one single Globo", "one Globo just for you").³² Through them, the Group has a real opportunity to become a transmedia communication company, preserving broadcasting programming, but investing preferably in streaming and aiming at internationalization³³ and, above all, creating changeable production and distribution strategies for rapidly changing scenarios. So has been the production of exclusive content together with co-productions by independent producers; partnerships with major players such as Disney+, Apple TV+, HBO-GO and Deezer³⁴ diversifying the platform's subscription models.

In 2020, Netflix Brazil was estimated to have grossed R\$6.7 billion³⁵ (about US\$1.2 billion), having surpassed the number of subscriptions of all cable TVs and engaging the users on social networks: of the 30 fictions shown in streaming with the highest number of impressions on Twitter, 28 were from Netflix.³⁶

Next in the national ranking appears the Amazon Prime Video, whose number of subscribers reaches 10 million. To be

31 <https://bitly.com/GrHeu>

32 Globo Group has been carrying out in recent years a general restructuring program, merging, dividing, firing and changing hierarchies in all its units and sectors. In January 2020 the new structure was introduced. In addition to having gathered in a single company what used to be 5 and having established new commands, what matters here is the unification of open TV, pay TV (cable channels) and streaming services.

33 On 01/19/2020, Globoplay debuted in the United States, the first step towards becoming an international streaming platform

34 <https://bit.ly/3vzr7Vp>; <https://bit.ly/3gCSauW>

35 Source: <https://bit.ly/35zcNBC>

36 Source: Kantar Ibope Media 2020..

competitive in the local market, it has invested in original programming, expanding the Brazilian catalog. In 2020, four fiction series, one documentary, and one reality show were produced in partnership with the Brazilian producers O2 Filmes, Los Bragas, and Conspiração Filmes.

3.2. Analysis of VoD in 2020: the Brazilian and Ibero-American fiction premier in Brazil

Table 6. National and Ibero-American fictions aired as VoD in 2020

NATIONAL RELEASED PRODUCTIONS	IBERO-AMERICAN RELEASED PRODUCTIONS	CO-PRODUCTIONS
<p>Globoplay – 19 titles</p> <ol style="list-style-type: none"> 1. <i>Chacrinha - A minissérie</i> (miniseries) 2. <i>Meus Dias de Rock</i> (series) 3. <i>Arcanjo Renegado</i> (series) 4. <i>Todas as Mulheres do Mundo</i> (series) 5. <i>O Dono do Lar</i> (series) 6. <i>Os Romi</i> (series) 7. <i>Dra. Darci</i> (series) 8. <i>Diário de um Confinado</i> (series) - 1st season 9. <i>Xilindró</i> (series) – 4th season 10. <i>Rio Heroes</i> (series) – 2nd season 11. <i>A Divisão</i> (series) – 2nd season 12. <i>Diário de um Confinado</i> (series) - 2nd season 13. <i>Santo Forte</i> (series) 	<p>Netflix – 14 titles</p> <ol style="list-style-type: none"> 1. <i>El Robo del Siglo</i> (Miniseries, Colombia) 2. <i>Las Chicas del Cable</i> (Series, Spain) - 5th season/1st part 3. <i>Élite</i> (series, Spain) – 3rd season 4. <i>La Casa de Papel</i> (series, Spain) – 4th season 5. <i>Valéria</i> (series, Spain) 6. <i>Perdida</i> (series, Spain) 7. <i>Las Chicas del Cable</i> (series, Spain) – 5th season / 2nd part 8. <i>Vis a Vis: El Oasis</i> (series, Spain) 9. <i>Alta Mar</i> (series, Spain) – 3rd season 10. <i>Los favoritos de Midas</i> (series, Spain) 11. <i>Jane the Virgin</i> (series, US) 	<p>Globoplay – 3 titles</p> <ol style="list-style-type: none"> 1. <i>Longe de Você</i> (series, Spain and Italy) 2. <i>Todo por el Juego</i> (series, Argentina and Spain) 3. <i>Jugar con Fuego</i> (series, US and Brazil) <p>Netflix – 2 titles</p> <ol style="list-style-type: none"> 1. <i>Alguién Tiene que Morir</i> (series, Spain and Mexico) 2. <i>Narcos Mexico</i> (series, Mexico and US) <p>BoxBrazil Play – 1 title</p> <ol style="list-style-type: none"> 1. <i>Submersos</i> (series, Brazil and Argentina)

NATIONAL RELEASED PRODUCTIONS	IBERO-AMERICAN RELEASED PRODUCTIONS	CO-PRODUCTIONS
<p>14. <i>Impuros</i> (series)</p> <p>15. <i>Desalma</i> (series)</p> <p>16. <i>As Five</i> (series)</p> <p>17. <i>Feras</i> (series)</p> <p>18. <i>Me Chama de Bruna</i> (series) - 4th season</p> <p>19. <i>Diário de um Confinado</i> (special)</p> <p>Netflix – 7 titles</p> <p>1. <i>Onisciente</i> (series)</p> <p>2. <i>Spectros</i> (series)</p> <p>3. <i>Reality Z</i> (series)</p> <p>4. <i>Coisa Mais Linda</i> (series) - 2nd season</p> <p>5. <i>Boca a Boca</i> (series)</p> <p>6. <i>3%</i> (series) – 4th season</p> <p>7. <i>Bom dia, Verônica</i> (series)</p> <p>Prime Video – 5 titles</p> <p>1. <i>Homens?</i> (series) – 2nd season</p> <p>2. <i>Sonhadores</i> (miniseries)</p> <p>3. <i>Me Chama de Bruna</i> (series) – 1st to 3rd seasons</p> <p>4. <i>I Contra Todos</i> (series) - 2nd season</p> <p>5. <i>Impuros</i> (series) - 2nd season</p>	<p>12. <i>Control Z</i> (series, Mexico)</p> <p>13. <i>Historia de un Crimen: La Búsqueda</i> (Anthology series, Mexico)</p> <p>14. <i>Oscuro Deseo</i> (series, Mexico)</p> <p>Prime Video – 7 titles</p> <p>1. <i>El Presidente</i> (series, Chile)</p> <p>2. <i>Dignidad</i> (series, Chile)</p> <p>3. <i>El Cid</i> (series, Spain)</p> <p>4. <i>Ana</i> (series, Mexico)</p> <p>5. <i>Maria Magdalena</i> (series, Mexico)</p> <p>6. <i>Cómo Sobrevivir Soltero</i> (series, Mexico)</p> <p>7. <i>De Brutas, Nada</i> (series, Mexico)</p> <p>HBO GO – 5 titles</p> <p>1. <i>Entre Hombres</i> (miniseries, Argentina)</p> <p>2. <i>El Día de Mañana</i> (series, Spain)</p> <p>3. <i>Vida Perfecta</i> (series, Spain)</p> <p>4. <i>Vergüenza</i> (series, Spain)</p> <p>5. <i>Dime Quién Soy</i> (series, Spain)</p> <p>Globoplay – 2 titles</p> <p>1. <i>Mães A(r)madás</i> (series, Spain)</p> <p>2. <i>Urgencia Cero</i> (series, Spain)</p>	

NATIONAL RELEASED PRODUCTIONS	IBERO-AMERICAN RELEASED PRODUCTIONS	CO-PRODUCTIONS
BoxBrazil Play – 5 titles 1. <i>Via Pública</i> (series) 2. <i>Imagem Vinil</i> (series) 3. <i>Amélio, o Homem de Verdade</i> (series) 4. <i>Liberto</i> (series) 5. <i>Verona</i> (series) HBO GO – 1 title 1. <i>Todxs Nós</i> (series)		
Total: 37	Total: 28	Total: 6
GRAND TOTAL: 71		

Source: *Obitel Brasil*

According to Table 6, 71 titles from Obitel countries were premiered in the VoD market in Brazil in 2020. The growth of Brazilian productions in this market is noteworthy.³⁷ Of these 52% (37) are national fictions; 39.5% (28) are Ibero-American and 8.5% (6) are Obitel countries' co-productions. In 2020, the number of premiere Brazilian fictions for VoD was 37 titles, a 61% increase over 2019, when there were 23.

Globoplay increased its production by 73%, with 19 titles against 11 in the previous year. It remained the main VoD platform for national fictions and also in co-productions with Obitel countries. Netflix recorded a slight drop in local production, from eight

37 It was just in 2016 that the first Brazilian series premiered on a major platform - 3%, a production by Boutique Filmes for Netflix. Today, virtually every major Brazilian producer makes series and films for streaming.

to seven titles. It is worth mentioning that, as of 2020, Prime Video, BoxBrazil Play and HBO GO started to produce national and Ibero-American fictions.

As for the number of premiere productions aired per platform, Globoplay ranked first with 34% (24), followed by Netflix with 32% (23) and lagging behind in the third place comes Prime Video, with 17% (12); BoxBrazil Play and HBO GO appear with 8% (6) each.

Ibero-American fiction premieres amounted to 28 titles, corresponding to 39.4% of the total. Spanish fictions prevailed among Ibero-American releases, with 100% increase over 2019. A highlight is the strong presence of the series *La Casa de Papel* and *Élite* in the social media.³⁸

Most of the premieres on Brazilian VoD were worldwide, with some exceptions. These were the Spanish production *Urgencia Cero* (2016); the United States series *Jugar con Fuego* (2019), a co-production between Telemundo and Globo; and the remake of the Brazilian miniseries *Amores Roubados* (Globo, 2014), which premiered directly on Globoplay in 2020.³⁹ Two Chilean productions of Prime Video stand out: *El Presidente* and *Dignidad*, the first Chilean productions released on the Brazilian VoD. The Mexican series *Oscuro Deseo* was one of the hugest hits of Netflix in Brazil in 2020, standing for more than 7 weeks among the most watched series⁴⁰.

38 Source: Kantar Ibope Media 2020.

39 <https://bit.ly/2TM38oY>.

40 Cf. <https://tinyurl.com/zzy9yzn>

Table 7. VoD premiered fiction in Brazil in 2020: countries of origin

Country	Titles	%
NATIONAL (total)	37	52.1
IBERO-AMERICAN (total)	28	39.4
Argentina	1	1.4
Brazil	37	52.1
Chile	2	2.8
Colombia	1	1.4
Spain	16	22.5
USA (Hispanic production)	1	1.4
Mexico	7	9.8
Peru	0	0.0
Portugal	0	0.0
Uruguay	0	0.0
Venezuela	0	0.0
CO-PRODUCTIONS (total)	6	8.5
Brazilian co-productions	2	2.8
OBITEL countries' co-productions	4	5.6
GRAND TOTAL	71	100.0

Source: Obitel Brasil

For the first time since we registered the VoD premiered fictions, the Brazilian productions surpassed those from Ibero-American countries, with 37 titles (52.1%). Among the national

fictions in VoD, two series are remarkable: *Arcanjo Renegado* (Globoplay) fully released on the digital platform, and further displayed as weekly episodes series on TV Globo; and the second season of the series *Coisa Mais Linda* (Netflix) whose title in English was changed from *Most Beautiful Thing* to *Girls from Ipanema*, to attract the international audience.

4. Fiction and audience participation in digital media

Streaming impacts both the transformation of the process of creation, production and distribution of television fiction, as well as of the reception. We will evidence multidimensional aspects of the audience participation in digital media, among them: digital expansion, social interactivity and emerging fiction production.

The suspension of fiction productions led to the rearrangement of recording schedules, imposed the adoption of health protocols - spread in making of and news⁴¹ on the TV and digital media - and changed some narratives. On the other hand, we observed huge offer of classic telenovelas on Globoplay streaming, a case that drove a strategy of digital expansion.

Regarding the forms of participation and social interactivity of the audience, the imbrication of audiences on the Internet sharpens the fierce and internationally known activity of Brazilian fans in the digital media⁴². As regards the consumption of television narratives, what prevail are the Social TV and the production

41 We refer to the case of *Amor de Mãe*, whose recording protocols and the proper storytelling narrative were made available in making of and institutional videos on the Gshow website and by TV Globo itself along the programming.

42 <http://bit.ly/3vz2KHq>

of expanded content, such as *memes* and *fanfictions*. The way users appropriate television content, resignifying, reproducing and re-creating it has been understood as an important manifestation of the contemporary Brazilian culture (Vieira, 2021).

4.1. Proposal on digital expansion proposal

Podcasts⁴³, as interactive digital media, have had a remarkable boom in Brazil. We can mention the podcast of GShow (Globo Portal), *Novela das 9*, on air since 2018, which aimed to comment on Globo's telenovelas and, since 2019, includes exclusive interviews with members of the technical crew. In 2020, with the interruption of *Amor de Mãe* recordings, the *Novela das 9* started to talk about other titles, such as: *Vale Tudo* (1988), *Tieta* (1989), *Torre de Babel* (1999), *Laços de família* (2000), *A favorita* (2008), etc.

4.2. Social interactivity

The uses of digital media as a second screen of TV programs has become a habit of the Brazilian viewer.⁴⁴ These are standpoints, opinions, debates, interpretations, and other modes of *sociability* that express the competencies of reception (Martín-Barbero, 2009). In 2020, among the 10 most commented fictions on Twitter, 60% were Globo telenovelas and 40% Netflix series – an image of the Brazilian market.

43 The word podcast is a combination of POD (Personal On Demand) and CAST, from broadcasting, and designates the digital audio file made available on the Internet, usually through series. Its popularity in Brazil was already growing, but it exploded in the midst of the pandemic, due to domestic confinement, thus creating a new non-image interactive audience.

44 Research shows that in 2018 the number of Brazilians with Internet access who used the net while watching television was 95%, very far from 88% recorded in 2015. Cf. <https://bit.ly/2TM58x7>.

Table 8: TV fictions with greater interaction (RTs⁴⁵, likes and responses) on the Brazilian Twitter in 2020

Title	Format	Channel / Streaming	Tweets	Total Interactions
1. <i>Avenida Brasil</i> Rerun	Telenovela	Globo	2,864,055	8,915,582
2. <i>Fina Estampa</i> <i>Special Edition</i>	Telenovela	Globo	1,356,531	4,413,437
3. <i>Amor de Mãe</i>	Telenovela	Globo	1,353,640	4,413,437
4. <i>A Força do Querer</i> <i>Special Edition</i>	Telenovela	Globo	1,116,632	3,410,180
5. <i>Dark</i>	Series	Netflix	939,820	3,373,116
6. <i>Sex Education</i>	Series	Netflix	939,276	3,338,146
7. <i>La Casa de Papel</i>	Series	Netflix	922,666	3,134,052
8. <i>Malhação. Viva a</i> <i>Diferença</i>	<i>Telenovela</i>	Globo	822,902	3,007,238
9. <i>Totalmente Demais</i> <i>Special Edition</i>	Telenovela	Globo	774,939	2,804,463
10. <i>Anne with an E</i>	Series	Netflix	688,858	2,441,390

Source: Kantar Ibope Media

45 RT is the acronym for reweet, i.e., sharing other person's publication on your timeline.

Another relevant aspect of the table is that of the 6 Globo's fictions, 5 are reruns: *Avenida Brasil* (2012), *Fina Estampa* (2011), *Totalmente Demais* (2016), *A Força do Querer* (2017), *Malhação-Viva a Diferença* (2017).

A Força do Querer (ranked fourth place) got the highest number of tweets per minute in 2020 - 1.171 on September, 21; *Fina Estampa* (ranked second place) got the second and the third, with 820 posts per minute on April 1, and 691 on March 23.

Memes are “user-generated content” (UGC) format and correspond to a large part of posts. In joking and satirical tone, the *memes* reflect the audience's reaction. The *memes* of *Avenida Brasil* are remarkable and since the first screening they have become iconic in the Brazilian digital language.

The production of *fanfictions* by the audience of *Malhação - Viva a Diferença* has more than 300 stories on the website *Spiritfiction.com*⁴⁶, mostly dedicated to the “Limantha” *ship*, formed by the lesbian teen couple Lica and Samantha. As it seems, these stories pretend to explore unmentioned aspects of sexuality and intimacy of the characters.

4.3. Emerging fiction production

The lack for LGBTQIA+ representation on television has driven their presence in independent productions, mainly available on the YouTube. *Esconderijo*, *Septo*, *Madu*, *The Stripper*, *Contos Latentes*, *Magenta* and *Ellas* are some of the webseries released in 2020 addressed this theme. Social isolation ensuing from the pandemic was presented in *Sintomas*, *Horas em Casa*, *Quarentenados* and *Home Office - A série da Quarentena*.

46 Accessed on Apr. 19, 2021, 3:00 pm.

The national webseries last 15 minutes on average. In addition to single episodes, some launch the whole season in one single video. They are usually crowdfunded and, as advertising strategy, also launch the videos making of.

5. Highlights of the year

The pandemic directly affected the chain of television fiction production, from the script to the production, circulation and consumption of this genre. This context defined the highlights of the year in the country.

5.1. *Diário de um Confinado* and *Amor e Sorte*: the challenge of creating in the pandemic, about the pandemic

When the studies were closed, Globo had to innovate to guarantee the exhibition of new fictions. Therefore, it resorted to recordings in which actors used their own homes as locations, also taking responsibility for the technical part, with remote assistance from other professionals. There was the case of two series, *Diário de um Confinado* and *Amor e Sorte*, two comedies about the attempts to prevent the contamination. Both replaced fixed programs on Globo's schedule and are available on Globoplay.

Diário de Um Confinado (6/26 to 9/24/2020), a 12-episode comedy series (10 minute each episode), follows Murilo, a man who lives alone, and the conflict between his problems and the restrictions imposed by the quarantine. The series takes place inside an apartment and incorporates video calls (which we will call *pandemic resource*) to introduce new characters into the plot.

In weekly episodes with independent casts, *Amor e Sorte* (09/08 to 09/29/2020) was an anthology series of four stories about the challenges of love and intimacy in the forced coexistence imposed by the quarantine.⁴⁷ The first episode, called *Lucia e Gilda*, told the journey of a mother and daughter forced to deal with their differences during isolation in their country home; in the second episode, *Linha de Raciocínio*, we see the debate over participating in a “*panelaço*”⁴⁸; other episode, *Territórios*, featured two ex-weds forced to live together while waiting for the result of the COVID-19 test; and the last episode, *A Beleza Salvará o Mundo* featured a newlywed couple trying to discover a drug for the virus while making movies.

We saw innovation processes by which unusual conditions under which *Amor e Sorte* was produced were incorporated into the work itself, through behind-the-scenes shots and crew comments exhibited during the breaks or released on Globoplay and the Globo channel’s website. It seemed that the aspects listed (use of a single location; remote crew; small cast; current thematics) constituted both creative innovations and narrative, formal, and technical originality.

47 Even in these pandemic formats, the narrative combined humor and the tradition of realism that is the hallmark of the Brazilian television fiction.

48 “Panelaços” (banging pans) are collective demonstrations of people banging household utensils (mainly pans) at a time scheduled on social networks, generating a noisy and characteristic sound. They have become very common in recent years in Brazil as a form of opposition to the government.

5.2. *Sob Pressão-Plantão COVID*: reality and alert

Globo also used existing productions to address the pandemic, as in the Special Program of the medical series *Sob Pressão - Plantão COVID*, released both on Globo and Globoplay on 10/06 and 10/13/2020.

In two episodes, the protagonist couple of doctors works in one of the hospitals built to expand pandemic care. The characters have to manage the lack of information about the virus, as well as the shortage of beds and equipment, while taking risks related to threat of contamination.

Following the naturalistic aesthetic, the work serves as an alert to the people, emphasizing symptoms and risks of the diseases, forms of prevention, and the precariousness of the Brazilian health system. At the end of the first episode, it has been shown the card “The pandemic is not over yet. Caring for yourself is caring for others”; and in the second episode, “This is our tribute to the health professionals who care for patients contaminated by COVID-19”. The cards displayed at the end of each episode clarify the *pedagogical action* (Bourdieu, 1970) identified in the Brazilian television fiction.

5.3. Globoplay and the “telenovelas digital library”

In 2020, Globo boosted the catalog of Globoplay, its streaming platform (which in 2019 already had 91 telenovela titles, mostly post-2010), with an unprecedented release of old teleno-

velas with remastered image.⁴⁹ In May, the network announced the gradual release of 50 of its “classic novelas”, many never rerun. So it was truly created a “digital library”, according to Newcomb (1999):

(...) as the first authors were publishers and booksellers, so today’s broadcasters may find themselves in the position of publishers, offering materials for a large digital e-library. Users will access these virtual collections as they have accessed all libraries (free translation, p. 120).

It has been a response to the year of pandemic restrictions on television. *A Favorita* (2008) was the first telenovela released, and every 15 days a new title, prior to 2010, is added to the library.

The offer of telenovelas⁵⁰ such as *Dancin’ Days* (1978), *Roque Santeiro* (1985), *Selva de Pedra* (1986), *Que Rei Sou Eu?* (1989), *Tieta* (1989), *Rainha da Sucata* (1990) among others, and the possibility of watching them on demand, make evident the links that the telenovela sustains with history and memory, as archive of individual knowledge (Motter, 2001). And now, as a digital library, it urges further investigations on the effects of meaning the classics of this genre create and recreate with the present.

49 This is an unprecedented launching as it is made for streaming only telenovelas, when this platform has become known globally for making series as its identity format. However, it does not seem to have been a surprising launch at all. The previous experience with Canal Viva, Grupo Globo’s cable channel, whose programming comprised only reruns, has been noted for its good ratings, having even ranked the first among cable channels. It is very likely that Globoplay based on this experience to launch the project of rerunning old telenovelas.

50 Cf. <https://glo.bo/2UbXZGJ>

6. Theme of the Year: Television fiction in times of pandemic

The COVID-19 pandemic - with the latent risk, suffering and fear of death spreading all over the world - challenged the mindset of many national and international thinkers, marked by the speech of philosophical anthropology, but easy to access and understand. For us, incorporating these readings into the Theme of the Year was crucial, serving as a macro frame for the analyses that follow. They allowed us to believe that despite the state of permanent crisis, society can create forms of global solidarity and cooperation. Our effort aimed to follow, to capture these ambivalences and to verify how the Brazilian television fiction tried to respond, resisting to this pandemic scenario in its very own way.

The adoption of social distancing proved to be one of the most effective measures to contain the spread of the virus. However, the progressive scientific advances about its lethality led the world to entering periods of social isolation, already characterized by Agamben (2004) as a “state of exception”. That because viral epidemics affect our most elementary interactions with people and objects surrounding us (Žižek, 2020). As we observed, this emerging and unprecedented context sharpened political and socioeconomic decisions that directly affected the audiovisual sector and, in particular, the production and broadcast of television fiction, as aforementioned. We soon noticed an increase in the use of streaming⁵¹ and the expansion of multiple screens, potentiating assistance in the domestic room and thinning the limits between public and private spaces.

51 Cf. <https://cutt.ly/jnCLaoS>

Changes in the ways of working, learning, entertaining, and also watching television fiction create new habits, since all these activities, essentially, require partial or total using of screens, be they cell phones, notebooks, tablets or computers. Spread within the private space, these screens have transformed home into a place for work, rest, and leisure all at once.

The mediations of *sociality*, *technicity* and *rituality* (Martín-Barbero, 2009) give us clues to understand this pandemic domestic environment, because inside it the technological mutation to which contemporary society is submitted, has entered an accelerated rotation, and starts to configure a new communicative ecosystem. *Sociality* undergoes deep changes as a social bond, through which “social relations are established as well as the subjectivities composed by these relations that interfere in the contact of actors with the social world and also with the media” (Pereira, 2020, p. 63) and also contributes to the identity construction of these actors. *Rituality* corresponds to the social use of the media precisely in the interaction between spaces and the temporality of the everyday life, which was transmuted due to the contingencies imposed by the pandemic. The domestic room, the main place where people stay during social isolation, is composed of a set of rituals that make up the daily life and interaction of persons, having the media incorporated into this space. *Ritualities*, resignified by globalization and the pandemic, are materialized in relation to the new industrial formats enabled by *technicity* (Martín-Barbero, 2009, p. 152). Technicity consists of the competencies of uses and appropriations of materiality and technical apparatuses, that is, how technology shapes culture and social practices (Ronsini, 2011). The technical models that supply both the demand for reception/consumption and the pur-

suit of profit by media companies also needed to be modified as a result of the virus.

As we have already mentioned, the *production logics* (Martín-Barbero, 2009) of the media were drastically affected, leading to the suspension of recording of ongoing fictions. And for the first time, a telenovela, *Amor de Mãe* (Globo, 2020, 9pm), could not be seen as an “open-end work”, i.e., conditioned to the time it is on air, because the suspension of its recordings occurred when 102 chapters had already been broadcast. It was replaced by a rerun⁵² and was rerecorded in late 2020, set to end in 23 chapters⁵³, to be aired in early 2021. However, because of the unprecedented experiences we observed in this telenovela, we could not help but take it as a *case study*.⁵⁴

Case study: The telenovela *Amor de Mãe*, pandemic and resistance

Amor de Mãe (*Mother's Love*) enters the history of Brazilian television drama as the first telenovela to portray the pandemic.

It is an example of the classic naturalistic melodrama, impregnated with real life stories, the distinctive trait of the Brazilian telenovelas. The plot is about the stories of three women on their journeys of motherhood. The main character, Lurdes, a maid, has been searching for over 26 years for Domênico, the son sold by her alcoholic husband to the child trafficker Katia. The second character is Thelma, Danilo's overprotective mother, discovers she has an aneurysm, and must deal with the anguish of organizing her son's

52 The telenovela *Fina Estampa Special Edition*, originally recorded in 2011.

53 Called “second phase” to be aired from March 15 to April 9, 2021.

54 We relied on the fact that the telenovela recording was resumed and ended still in 2020 (08/10 to 11/14) in order to conduct this case study.

life before her death. The third is Vitória, a successful black lawyer, despite numerous failed attempts to become a mother, after a twist of fate, becomes the mother of three children, while reconciling motherhood with professional life brings her ethical challenges hitherto unforeseen.

The narrative strategy adopted for the resumption of exhibition was innovative. It started with a 15-day summary of the plot recorded before the pandemic. The aesthetic resource used was the *voiceover* of the three protagonists, each one narrating the scenes she had acted. The narrative, with a remarkable melodramatic accent, sharply marked by melodrama, is structured around strong female characters, employs changing approach on their identities, and shows an innovative aesthetic that brings it closer to cinematographic references. Manuela Dias, a praised scriptwriter, absorbed the pandemic into her plot, making *Amor de Mãe* a reference in how open-end work is not only susceptible to, but is potentially capable of dialoging with an unpredicted reality.

In its second phase, the telenovela starts depicting the daily life of its characters having to deal with the virus, taking advantage of the disease's impact to better outline the narrative. Recordings were interrupted in full climax, when Thelma discovers that Danilo, her beloved son, is actually Domênico, Lurdes' lost son. And so, the new phase begins with the anguish of Lurdes who, forced to remain in isolation, is prevented from following her saga. Meanwhile, Thelma, now definitively an antagonist, capable of killing to hide the secret of Danilo's adoption, celebrates the restrictions of circulation that will force her son to stay at home.

Amor de Mãe surprises by inserting reality into its plot with epic effects⁵⁵, as the actors' gaze is directed at the camera, as if they were addressing the viewers directly. This record of acting, added to the temporal displacements and the morally questionable decisions of some characters, make up an aesthetic panorama that brings the telenovela closer to the Brechtian paradigm (Rosenfeld, 1985). We notice a strong dialogue with the journalistic discourse. Shown with an off-screen narration that contextualizes the incidence of the pandemic, the first telenovela scenes are aired, without commercial break, after Globo main TV news, leading to several layers of meaning by merging the news on the pandemic reality and the fictional narrative.

The absorption of the pandemic into the plot can be observed through the repeated use of communication technologies: Lurdes will use the internet to disseminate a video-testimonial about her search for her son; Davi, an environmental activist, will use "lives" to expose his struggle. Likewise, the video calls of the board meetings of Álvaro and Raul's company; in Vitória's chats with her sisters; in Sandro and Betina's online wedding, etc. In all these situations, mobile and/or computer screens interfaces overlap with the TV screen and express themselves by the aforementioned mediations of *sociality*, *rituality* and *technicity*.

The plot also portrays social problems resulting from the pandemic. Camila, a resilient public school teacher, faces difficulties teaching her classes online, when some of her students disappear. Betina, who had abandoned her job as a nurse, is compe-

55 We refer here to Bertolt Brecht's epic theater who, in search of a distancing effect (*Verfremdungseffekt*) to abolish the audience's catharsis, employs narrative artifices in his plays. The breaking of the fourth wall stands out, in which the character addresses the audience directly and breaks with the illusory tradition of the bourgeois theater.

lled to return to the overcrowded hospital to help treat the infected patients. Danilo, an entrepreneur who knew how to take advantage of the delivery service to keep his restaurant going, is in opposition to Nuno, the owner of a bar who had to close the doors of the establishment. Finally, Globo starts to carry out socio-educational actions by publishing an informative card about COVID-19 at the end of each telenovela chapter.

Final remarks

The decision for incorporating the pandemic into a fiction narrative after the resumption of its recordings, clearly demonstrates the naturalistic character of the plot and the production's concern to portray with verisimilitude the economic and sanitary problems caused by COVID-19 which were unequally experienced in the stories of the three protagonists. At the same time, it showed the positive changes that took place in them, whether through maternal love for their children, by engagement in social causes, and by awakening of solidarity and cooperative consciousness.

Due to the negationist position (Caponi, 2020) adopted by the Brazilian government in relation to the coronavirus, *Amor de Mãe* represents a "communication resource" (Lopes, 2009), a pedagogical tool for the population, as it articulates the TV news that precedes the plot and materializes the dialogue between fact and fiction. García Canclini (2020) diagnoses that this educational role performed by the media, and especially by telenovelas in the Brazilian case, are symptoms of the current lack of confidence of citizens in their governments and in traditional political structures.

Social visibility is hitch up to television, as it represents the reality of the country on the imaginary level, with its conflicts, contradictions, and ambivalences. The naturalism of the telenovela

reaffirms this notion of reality, as for Guinsburg and Faria (2017) naturalism discloses the “rough world” of different social conflicts. In *Amor de Mãe* these elements are evidenced by inserting issues that are characterizing the pandemic context experienced by the country.

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3

CHILE: THE YEAR WE STAYED HOME¹*DOI: <https://doi.org/10.7764/obitel.21.S.5>*²**Authors:**

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Introduction

Were it not for the arrival of the COVID-19 pandemic, it is probably that Chilean television (TV) during 2020 would have been marked by the social demonstrations and political events occurred in early October, 2019. In the weeks following the beginning of the outbreak, low advertising activity was notorious. Given the perplexity caused by the events, advertisers withdrew their advertisements. The social and political facts were so significant that the advertising messages could not be longer the same, but to adjust them would probably have been understood as frivolity or opportunism. Silence was the answer. Demon-

1 Authors want to express their gratitude to Kantar IBOPE Media Chile company, without whose invaluable help this work would not be possible

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strations were expected to be back in force in March, after the arrival of summer, but instead the pandemic came along.

As it happened in almost all the countries, efforts to fight the pandemic implied serious restrictions to individual mobility, and many were forced to stay, for long periods, at home, with no possibility of going out to work, study or just to entertain. The presence of a greater number of people at home increased the necessity and the availability of time to consume audiovisual contents. Open TV as well as pay TV audiences, that had been declining, grew; pay TV subscriptions stopped dropping and subscriptions to video on demand (VOD) services increased. The growth of home fixed internet doubled while the growth of mobile connections accelerated, and data traffic tripled in comparison to the previous year. Excepting cinemas, all the screen were on.

However, as consumption increased during 2020, the production collapsed. National fiction premier dropped nearly by half due to the production difficulties imposed by sanitarian restrictions, and reruns of national productions already exhibited characterized the screen of open TV.

1. The context of audiovisual services in Chile in 2020

1.1 Open television in Chile

Chart 1: National open television channels in Chile

Private broadcast / channel (6)	Public broadcast / channel (1)
Canal 13: Grupo Luksic (chilean)	TVN, just with advertising financing
Chilevisión: Viacom CBS[1].	
La Red: Grupo Albavisión.	
Mega: Grupo Bethia (chilean), Discovery Communications (27.5%)	
Telecanal: Owned by Alfa Tres, (vinculado a Albavisión).	
TV+: Media 23 (chilean), P. Universidad Católica de Valparaíso.	
CHANNEL TOTAL= 7	

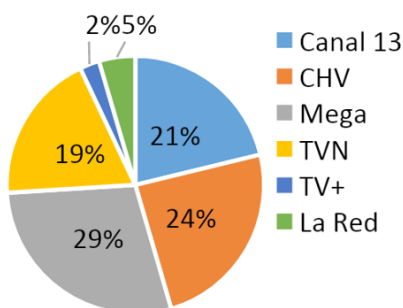
Source: Obitel Chile

The economic performance of main TV channels during 2020 were dissimilar. Both, channel 13 and TVN, which had sustained losses of US\$9 million y US\$17 million, respectively, in 2019, managed to have positive figures in 2020 as a consequence of substantial restructuring efforts and cost reductions. Channel 13 made profits for US\$9 million and TVN for US\$1.1 million. TVN case was particularly significant, because this company had been having losses since 2013, and risked to be intervened and transformed into a public channel.

Different were the cases of CHV and Mega. The latter ended the year with losses of around US\$6.7 million that, added to those from 2019, US\$23 million, and the negative figures accumulated since 2013, showed how frustrate the Chilean experience has been for Warner Media, from the purchase of the company until its sale. While, Mega had losses for US\$4 million, but even worse, it started to have losses after continuously deteriorating financial results since 2016.

Graph 1. TV share and rating by channel in 2020³

Channel	Home Rating (%)	Total TV Share (%)	Open TV Share (%)
Canal 13	5,2	13,1	21,2
CHV	6	14,9	24,3
Mega	7	17,6	28,5
TVN	4,7	11,7	18,9
TV+	0,6	1,5	2,5
La Red	1,1	2,8	4,6
Telecanal[1]	n/d	n/d	n/d
Total open TV	24,6	61,6	-
Total pay TV	15,3	38,4	-
Open TV + pay TV	39,9	100	100



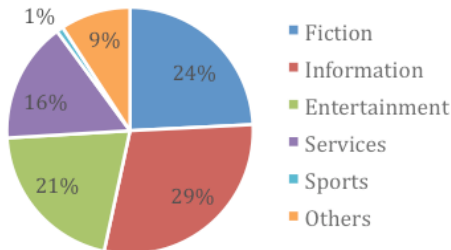
Source: Kantar IBOPE Media Chile – OBITEL Chile

3 Home rating measured 24 hours daily, regardless of channels transmission schedules.

Mega continues to hold the audience leadership conquered in 2014, but it was the only one of the four main channels that decreased its audience results. Considering those four channels as a total, Mega reached its greater share in 2017 with a 37%, and since then its participation has been decreasing until it reached 31% in 2020. This company is still the leader by far, even though both its market participation and its profits have dropped. Other channels have maintained their positions.

Graph 2. Television genres and hours broadcast by TV programming in 2020.

Genres broadcasts	Hours of broadcasting ¹	% Time	% Audience
Fiction	10.980:00	24,2%	38,8%
News	13.235:55	29,2%	31,3%
Shows	9.381:45	20,7%	8,8%
Services	7.184:15	15,8%	6,2%
Sports	402:10	0,9%	0,5%
Others	4.177:10	9,2%	14,3%
Total ²	45.361:15	100%	100%



Source: Kantar IBOPE Media Chile – OBITEL Chile

Even though at the aggregate level screen time and consumption preferences tend to be relatively steady, the effect of the pandemic resulted in an increase of screen time dedicated to news, while audiences' preferences for fiction remained the same. The latter may be construed having in mind that all sources of alternative audiovisual contents that grew in 2020, such as platforms or pay TV, are basically orientated to fiction. During this year, the total of displayed or exhibited hours on open TV dropped to 922 compared to 2019, and although all the categories experimented decreases, the number of hours dedicated to news increased up to 534.

1.2 Pay TV and VOD platforms in Chile

Chart 2. Chilean pay TV Networks

The ten most viewed pay TV channels in Chile			
Channel	Genre	Origen	Home Rating
24 Horas	News	Chile	0,72
Fox Channel	Fiction	Foreign	0,68
Cartoon Network	Children	Foreign	0,67
Discovery Kids	Children	Foreign	0,53
CNN Chile	News	Chile	0,47
TNT	Fiction	Foreign	0,45
Disney Channel	Children	Foreign	0,41
AXN	Fiction	Foreign	0,40
Disney Junior	Children	Foreign	0,35
Discovery H&H	News	Foreign	0,35

Source: Kantar IBOPE Media Chile

Chart 3: VOD platforms in Chile

Main VOD active platforms in 2020
Five most popular platforms for those who have at least one subscription: Netflix, Prime Video, HBO, Disney +, CDF Estadio
VOD from cable operators: Movistar Play, VTR+, Claro Video, Entel Go, DirecTV Go
Other popular platforms: Apple TV, Onda Media, 13Now, Cining, Punto Ticket, CNTV Play

Source: for the five most popular, Streaming Studio in Chile from Jelly Agency; the rest, OBITEL Chile

1.3 Independent TV fiction production companies

During the last great economic crisis in Chile, the *Subprime* crisis, in 2008 and 2009, most of the main TV independent production companies, such as Cine Cien, Roos Film, Nueva Imagen, Cubo Negro, Buen Puerto, Cinembargo, Calypso, among others, had to close down. The reason for this is that production companies are usually organizations with little working capital and dependent on the continuity of their projects. The industry has become more sophisticated and main production companies now, such as Parox, DDRío, AGTV or Fábula TV, are better structured and diversified. But, the suspension and postponement of projects during 2020 and 2021 have strongly reduced the production volume, and it could be possible that some of these companies or other of lesser size find it difficult to remain in business.

1.4 Funding sources of the audiovisual sector

Advertising investment is still the main source of funding of open TV, despite its ongoing decline as investment target, as well as

fiction TV. Pay TV, which has other sources of funding, is not relevant for this matter since this TV does not produce any fiction in Chile.

Until September, advertising investment in open TV had a similar behavior compared to 2018, but during the last quarter of 2019, which traditionally is the time of strongest revenues, this investment dropped as a consequence of the social convulsions that started in Chile in October. Advertising investment remained about flat in January 2020, and in February, when it seemed to start recovery, the Covid-19 pandemic arrived and negatively impacted on it, and the investment started to fall again until April.

From May, it started a slow recovery, and it was just in September when it could recover levels compared to those of 2018. Nevertheless, advertising investment in open TV ended 2020 in US\$227 million, which represents 20% less of the investment inflows recorded in 2019, 36% less than those registered in 2018 and 63% less than the investment in 2011, when it reached its all-time high (AAM, 2021 y ACHAP, 2012). In other words, open TV and fiction TV are being financed from resources similar to those of 2000, and this happens in a period when Chile's GDP per capital has tripled.

Unlike advertising resources, funds from the National Council on Television (CNTV), which main goal is to promote a quality television in different formats, had a significant increase of 45% regarding the previous year, reaching the sum of \$4.585 million. However, despite the increase, this fund represents just 2,5% of advertising resources, thus it cannot compensate the decline in open TV budget.

New funding sources for fiction are expecting from VOD platforms. Although the cases are sporadic, the four Chilean series released on Prime Video in 2020, being two of them co-productions, show this to be an emerging but feasible path for developing national fiction series.

1.5 Communication policies

The closure of schools due to the Covid-19 pandemic and the consequent presence of children at home revealed something that has been dragged on for years: the reduction of TV programs specifically for children in Chilean TV. According to data prepared for Obitel previous reports, the sum of animated series and education and instructional programs signified 1,3% of the screen time in 2019. A decade before, in 2009, this figure represented 9,4%. This is due to the nearly disappearance of animated series.

Pay TV offers different content options for kid's entertainment, but few of them have an educational purpose; therefore, houses with or without pay TV were equally affected by the lack of an education component. The answer to this problem was the creation of the TV signal *TV Educa Chile* launched on April 27, 2020. This is an educational experience jointly promoted by TV channels and supported by the CNTV and the Ministry of Education, as well as other collaborators who made available to this TV signal their contents at no cost. Contents were broadcast through multiple ways: streaming channels, digital TV signal from the main open TV channels and many pay TV operators.

This experience motivated the projection of other initiatives. Based on a study made in 2019, the CNTV (CNTV, 2019) identified a shortcoming of programs for older adults, although they represent a population group with more time for consumption. This lack was highlighted during the lockdown caused by the pandemic. In September 2020, the launching of a new signal for older adults in 2021, *TV Mayor*, aimed at filling educational and services information for this specific population, was announced by the CNTV. *TV Mayor*, if it is actually created, will not be the first segmented channel but the

first far reaching with a greater ambitious program. There is already an experience initiated in 2020, Vitalidad TV, but restricted to a geographical area. The channel is operated by the cable TV company Mundo, with a presence in regions like Valparaíso and Los Ríos. The creation of TV Mayor has been announced, but no progress on the project have been reported.

As it was mentioned before, one of the transmission ways of TV Educa Chile was the digital TV even though its full implementation is far from complete. According to the digital terrestrial television (TDT) law enacted in 2014 by then president Michelle Bachelet, the analogue blackout should have happened in 2020, but in 2019 TV channels managed to postpone it until 2024. If this deadline is met, 15 years will have passed since the definition of the norm to be used in Chile (ISBD-Tb) and its full implementation.

1.6 Digital and mobile connectivity infrastructure

Quarantines, confinements and circulation restrictions increased people needs for internet connections from homes, whether to study, to work or to entertain. This meant a rise of 13% in houses with a fixed internet connection and, at the same time, a fall of 6% in business internet connections. This increase in home connections almost tripled previous year's growth, and 2020 ended with approximately 58% of houses with a fixed connection to internet (Subtel, 2021b). The growth of fixed connection was accompanied by, from March, a rise of 64% in data traffic in comparison to the previous year (Subtel, 2021d).

Even if growth proved to be lower than in fixed connection, 3G and 4G mobile, which represent 99% of the total mobile connections, increased in 7% between December 2019 and December 2020, reaching a rate of 104,7 connections per 100 inhabitants (Subtel, 2021c) and an increase in data traffic of 40%.

2. Analysis of the Year: Chilean and Ibero-American premier fiction

Table 1. Fictions exhibited in 2020 (national, imported, premiers, reruns and co-productions)

UNRELEASED NATIONAL TITLES- 12
Channel 13
1. <i>Amor a la Catalán</i> (telenovela)
2. <i>Helga y Flora</i> (serie)
3. <i>Los Carcamales</i> (serie)
CHV
4. <i>Gemelas Idénticas en Nada</i> (telenovela)
5. <i>Héroes Invisibles</i> (miniserie)
Mega
6. <i>100 Días para Enamorarse</i> (telenovela)
7. <i>Dignidad</i> (serie)
8. <i>Historias de Cuarentena</i> (series)
9. <i>Verdades Ocultas</i> (telenovela)
10. <i>Yo Soy Lorenzo</i> (telenovela)
TVN
11. <i>Berko, el Arte de Callar</i> (series)
12. <i>La Jauría</i> (serie)
UNRELEASED FOREIGN TITLES - 13
Channel 13
1. <i>Luis Miguel La Serie</i> (series-USA Hispanic)
CHV
2. <i>Jesús</i> (telenovela-Brazil)
Mega
3. <i>El Otro Lado del Paraíso</i> (telenovela-Brazil)
4. <i>Nuevo Sol</i> (telenovela-Brazil)
5. <i>Orgullo y Pasión</i> (telenovela-Brazil)
TV+
6. <i>Pecado Mortal</i> (telenovela-Brazil)
7. <i>La Bruja</i> (telenovela-Colombia)
8. <i>Decisiones</i> (Unitary- USA Hispanic)
9. <i>Raphael de Spain</i> (miniseries-Spain)

La Red

10. *Cita a Ciegas* (telenovela-Mexico)
11. *La Rosa de Guadalupe* (series-Mexico)
12. *Rosario Tijeras* (telenovela-Mexico)
13. *Vencer el Miedo* (telenovela-Mexico)

NACIONAL RERUNS - 31

Canal 13

1. *Brujas* (telenovela)
2. *Irreversible* (series)
3. *Los 80: más que una moda* (series)
4. *Machos* (telenovela)
5. *Pacto de Sangre* (telenovela)
6. *Papi Ricky* (telenovela)
7. *Soltera otra vez* (telenovela)

CHV

8. *Lo que Callamos las Mujeres* (Unitary)

Mega

9. *Amanda* (telenovela)
10. *Eres mi Tesoro* (telenovela)
11. *Isla Paraíso* (telenovela)
12. *Papá a la Deriva* (telenovela)
13. *Perdona Nuestros Pecados* (telenovela)
14. *Pituca sin Lucas* (telenovela)
15. *Pobre Gallo* (telenovela)
16. *Señores Papis* (telenovela)
17. *Te Doy la Vida* (telenovela)

TVN

18. *Aquelarre* (telenovela)
19. *Aquí Mando Yo* (telenovela)
20. *Cuentos Chilenos* (telefilm)
21. *Dama y Obrero* (telenovela)
22. *Dónde Está Elisa* (telenovela)
23. *El Circo de las Montini* (telenovela)
24. *El Día Menos Pensado* (docudrama)
25. *La Canción de tu Vida* (series)
26. *La Chúcaro* (telenovela)
27. *Mea Culpa* (docudrama)

TV+

28. *Familia Moderna* (series)
29. *Infieles* (series)
30. *Los Años Dorados* (sitcom)

La Red

31. *Tira* (series)

FOREING RERUNS

Canal 13

1. *Pablo Escobar el Patrón del Mal* (series-Colombia)

CHV

2. *Victoria* (telenovela-México)

Mega

3. *Insensato Corazón* (telenovela-Brazil)

TVN

4. *José de Egipto* (telenovela-Brazil)
5. *Moisés los 10 Mandamientos* (telenovela-Brazil)
6. *El Chavo del Ocho* (sitcom-Mexico)

TV+

7. *El Secretario* (telenovela-Colombia)
8. *Decisiones* (Unitary- USA Hispanic)
9. *Marte* (serie- USA Hispanic)
10. *Tierra de Reyes* (telenovela- USA Hispanic)
11. *Cuenta Atrás* (series-Spain)

La Red

12. *La Esclava Blanca* (telenovela-Colombia)
13. *Águila Roja* (series-Spain)
14. *Hay Alguien Ahí* (series-Spain)
15. *Caer en Tentación* (telenovela- Mexico)
16. *Como Dice el Dicho* (series- Mexico)
17. *El Chapulín Colorado* (sitcom- Mexico)
18. *Esta Historia me Suena* (series-Mexico)
19. *Mujer Casos de la Vida Real* (docudrama-Mexico)

TOTAL UNRELEASED TITLES: 25

TOAL RERUNS: 50

TOTAL BROADCAST TITLES: 75

From its appearance in 2014, Turkish TV fiction is a necessary piece of information to understand Chilean TV panorama. Both, for its role in TV programming and for its consumption forms, Turkish fiction is almost indistinguishable from Ibero-American TV fiction, and it is broadcast by five TV channels. Moreover, in terms of TV fiction premiere, the importance of Turkish fiction is greater than any from other market player. In terms of time, it is equivalent to 61% of national and Ibero-American hours premiere, and in terms of audience, it represents 60% of the total audience reached by these two players.

But beyond the significance and persistence of Turkish phenomenon, the relevant fact of 2020, and specifically from March, was the impact of COVID-19 pandemic on TV production, programming and consumption.

Data from table 1 can illustrate the changes occurred between 2019 and 2020: the exhibition of national premieres was reduced from 17 to 12 titles, and just 5 of them were telenovelas that started its broadcasting in 2019; the rest were shorter duration formats. However, the presence of national fiction on the screen far from diminishing increased. The reruns of titles moved from 9 in 2019 to 31 in 2020.

At the Ibero-American level, although the number of titles premiere was slightly lower than 2019 (13 versus 14), reruns experienced an almost explosive increase, similar to the national case, by moving from 11 titles in 2019 to 19 in 2020.

Table 2. Fiction premiere: Countries of origin

Country	Titles	%	Chapters/ Episodes	%	Hours	%
NATIONAL (total)	12	48,0	504	35,5	274:00	27,6
OBITEL COUNTRIES (total)	13	52,0	914	64,5	719:50	72,4
Argentina	0	0,0	0	0,0	0:00	0,0
Brazil	5	20,0	451	31,8	349:50	35,2
Chile	12	48,0	504	35,5	274:00	27,6
Colombia	1	4,0	36	2,5	31:20	3,2
Ecuador	0	0,0	0	0,0	0:00	0,0
Spain	1	4,0	3	0,2	3:00	0,3
EE.UU. Hispano	2	8,0	11	0,8	7:50	0,8
Mexico	4	16,0	413	29,1	327:55	33,0
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
COPRODUCTIONS (Total)	0	0,0	0	0,0	0:00	0,0
National co-productions	0	0,0	0	0,0	0:00	0,0
Obitel countries co-productions	0	0,0	0	0,0	0:00	0,0
GRAND TOTAL	25	100,0	1.418	100,0	993:55	100,0

Source: Kantar IBOPE Media Chile – OBITEL Chile

Table 2 shows Ibero-American fiction TV premiere broadcast in 2020. For a completed vision, data from Turkish fiction TV broadcast during the same period must be considered: 7 titles, 725 episodes and 556 hours. This fact cannot be omitted because it far exceeds, in screen time, figures from any country from the region. Although, the broadcast of Turkish titles is spread over different TV time, except morning, it differs from national and Ibero-American in being less concentrated in prime time (30%), and a bigger proportion is intended to be broadcast during afternoons and evenings, resulting in a majority participation of Turkish titles during evening hours.

Focusing in Obitel environment, the drop of fiction premiere is the greatest seen since the beginning of this yearbook: both, the

number of episodes broadcast in 2020 and the number of transmission hours represented 56% of the behavior of these variables during 2019. Only Brazil achieved to increase its fiction premiere, but it grew from a relatively low base. Indeed, Brazilian titles went from 2 to 5, its episodes grew by 94% and the number of transmitted hours by 62%. Mexico represented the opposite case: number of titles, episodes and transmission hours decreased in 40%, 49% and 45%, respectively, compared to 2019. Just one title, *La Rosa de Guadalupe*, represented almost 25% of the general episodes and hours transmitted in 2020.

Table 3. Chilean and Ibero-American fiction formats

Format	National						Ibero-Americans					
	Titles	%	C/E	%	H	%	Titles	%	C/E	%	H	%
Telenovela	5	41,7	435	86,3	224:55	82,1	9	69,2	795	87,0	632:00	87,8
Series	6	50,0	65	12,9	44:35	16,3	1	7,7	5	0,5	3:50	0,5
Miniseries	1	8,3	4	0,8	4:30	1,6	1	7,7	3	0,3	3:00	0,4
Telefilm	0	0,0	0	0,0	0:00	0,0	0	0,0	0	0,0	0:00	0,0
Unitary	0	0,0	0	0,0	0:00	0,0	2	15,4	111	12,1	81:05	11,3
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
Total	12	100,0	504	100,0	274:00	100,0	13	100,0	914	100,0	719:50	100,0

Source: Kantar IBOPE Media Chile - OBITEL Chile

Table 3 shows that national fiction premiere in all formats, except *telenovela*, did not change significantly. It can be attributed to the fact that production and exhibition times for series and mini-series are longer than those for *telenovelas*, thus the effects of suspension on film shooting are more lagging. But, being *telenovela* the predominant genre in Chilean fiction, that even in a low production year represented 82% of screen time, it is understandable that a drop in this format will impact the overall figures. Indeed, the number of broadcast hours for national *telenovelas* premier decreased by 67% regarding 2019.

Even if 2020 is not a good year to establish trends, the absence of other formats has been observed during the last year, and it seems that the exploration of new TV formats does not include fiction. Options for this format seems to be, according to the interest of creators, on stream platforms.

Table 4. The ten top titles

	Title	Channel	Producer company	Format/genre	No. of chap/ep in 2020	Time slot	Rating	Share
1	<i>Verdades Ocultas</i> *	Mega	Chilefilms (CL)	Telenovela/Drama	152**	Afternoon	19,4	53,8
2	<i>Yo Soy Lorenzo</i> *	Mega	Mega (CL)	Telenovela/Musical comedy	95**	Prime time	17,0	40,9
3	<i>100 Días para Enamorarse</i> *	Mega	Mega + DDRío Studios (CL)	Telenovela/ Musical comedy	86**	Prime time	15,8	35,3
4	<i>Historias de Cuarentena</i> *	Mega	Mega (CL)	Serie/Drama	36**	Prime time	11,4	28,4
5	<i>El Otro Lado del Paraíso</i>	Mega	Globo (BR)	Telenovela/Drama	22**	Afternoon	10,7	38,4
6	<i>Nuevo Sol</i>	Mega	Globo (BR)	Telenovela/Drama	127**	Afternoon	10,4	31,4
7	<i>Los Carcamales</i> *	Canal 13	Kuarzo (CL)	Serie/Comedy	1**	Prime time	9,8	23,7
8	<i>Gemelas Idénticas en Nada</i> *	CHV	Parox (CL)	Telenovela/Drama comedy	73**	Prime time	9,6	21,7
9	<i>La Jauría</i> *	TVN	Fábula (CL), Fremantle (UK), Kapow (AR)	Series/Drama	8	Prime time	9,3	21,0
10	<i>Héroes Invisibles</i> ¹ *	CHV	Parox (CL), Kaiho Republic (FI), Yleisradio (FI)	Miniseries/Drama	4	Prime time	9,0	23,5
Total national productions: 8				Foreign Original Scripts: 5				

Source: Kantar IBOPE Media Chile – OBITEL Chile

(*): national production, (**): Emission started in 2019 or was deleted to 2021

Although 2020 represented a constraint to the exhibition of national titles premiere, it seems that national fiction has recovered the local public preferences. Prior to the Turkish appearance in TV, only exceptionally a foreign title managed to be in the top ten. Then, the industry entered into a deep crisis, and national production was partially displaced by Ibero-American fiction. However, since 2017, eight out

of the top ten titles are national productions. It is important to mention that the last title of the list in table 3 corresponds to a Chilean and Finnish co-production.

Moreover, if Turkish titles were included in this list, three *telenovelas* from that country would be part of the top ten, displacing three national titles.

Table 4a. The ten top national titles

	TitleS	Channel	Production company	Format/genre	No. of chap/e p in 2020	Time slot	Rating	Share
1	<i>Verdades Ocultas</i>	Mega	Chilefilms (CL)	Telenovela/Drama	152*	Afternoon	19,4	53,8
2	<i>Yo Soy Lorenzo</i>	Mega	Mega (CL)	Telenovela/Musical comedy	95*	Prime time	17,0	40,9
3	<i>100 Días para Enamorarse</i>	Mega	Mega + DDRio Estudios (CL)	Telenovela/ Musical comedy	86*	Prime time	15,8	35,3
4	<i>Historias de Cuarentena</i>	Mega	Mega (CL)	Serie/Drama	36*	Prime time	11,4	28,4
5	<i>Los Carcamales</i>	Canal 13	Kuarzo (CL)	Serie/Comedy	1*	Prime time	9,8	23,7
6	<i>Gemelas Idénticas en Nada</i>	CHV	Parox (CL)	Telenovela/Drama comedy	73*	Prime time	9,6	21,7
7	<i>La Jauría</i>	TVN	Fábula (CL), Fremantle (UK), Kapow (AR)	Series/Drama	8	Prime time	9,3	21,0
8	<i>Héroes Invisibles</i>	CHV	Parox (CL), Kaiho Republic (FI), Yleisradio (FI)	Miniseries/Drama	4	Prime time	9,0	23,5
9	<i>Helga y Flora</i>	Canal 13	Suricato (CL)	Series/Drama	10	Night	5,9	18,4
10	<i>Amor a la Catalán</i>	Canal 13	AGTV (CL)	Telenovela/Drama comedy	29*	Prime time	5,8	14,3
Total nacional productions: 10				Foreign Original Scripts: 3				

Source: Kantar IBOPE Media Chile – OBITEL Chile

(*): Emission started in 2019 or was deleted to 2021

Players are the main reason for the recovery of national predominance. Before Turkish irruption, the main players were Canal 13 and TVN. After the recovery, the absolute predominance corresponds to Mega, which obtained the first four places of the list in table 4a. Two

productions from Canal 13 got in the national top ten list, but their audience levels are significantly lower than those from the original table.

It is important to highlight that the only title from TVN in the top ten list, *La Jauría*, does not correspond to a traditional production in its dramatic area, but to an Amazon co-production, released almost simultaneously on that platform and on open TV.

Table 5. Audience profiles of the top ten titles: sex, age, socio-economical levels

	Titles	Channel	Gender %		Socioeconomic level %			
			Female	Male	ABC1	C2	C3	D
1	<i>Verdades Ocultas</i>	Mega	68	32	6	15	23	56
2	<i>Yo Soy Lorenzo</i>	Mega	62	38	5	16	25	54
3	<i>100 Días para Enamorarse</i>	Mega	59	41	8	15	25	52
4	<i>Historias de Cuarentena</i>	Mega	60	40	9	14	27	51
5	<i>El Otro Lado del Paraíso</i>	Mega	68	32	4	17	26	53
6	<i>Nuevo Sol</i>	Mega	65	35	4	15	24	57
7	<i>Los Carcamales</i>	Canal 13	65	35	10	35	16	40
8	<i>Gemelas Idénticas en Nada</i>	CHV	63	37	7	20	30	43
9	<i>La Jauría</i>	TVN	61	39	6	8	27	58
10	<i>Héroes Invisibles</i>	CHV	49	51	10	16	29	45

	Titles	Age groups %						
		04-12	13-17	18-24	25-34	35-49	50-64	65-+
1	<i>Verdades Ocultas</i>	4	3	6	16	19	21	30
2	<i>Yo Soy Lorenzo</i>	6	3	7	16	21	21	25
3	<i>100 Días para Enamorarse</i>	5	4	8	15	26	22	20
4	<i>Historias de Cuarentena</i>	6	3	9	16	26	25	14
5	<i>El Otro Lado del Paraíso</i>	4	4	7	13	19	26	28
6	<i>Nuevo Sol</i>	4	3	6	14	21	20	32
7	<i>Los Carcamales</i>	2	4	2	15	29	24	23
8	<i>Gemelas Idénticas en Nada</i>	4	3	6	13	28	21	24
9	<i>La Jauría</i>	2	2	3	8	19	29	38
10	<i>Héroes Invisibles</i>	0	1	9	9	25	29	26

Source: Kantar IBOPE Media Chile, OBITEL Chile

Standard behaviors from the audience profiles of the 2020 top ten list are verified: the audience from the most viewed TV fiction is mainly female, despite the fact these programs are broadcast when the whole family is at home, and this is particularly significant considering that during 2020, due to the confinements caused by the pandemic, there was a greater presence of all the members of the family in the home. The notable exception to this pattern was the Chilean-Finnish production *Héroes Invisibles*, whose main audience was male in a proportion superior to that from total population.

3. Monitoring VOD 2020

3.1. VOD platform market

2020 represents an anomaly in relation to the gradually growth experimented by VOD platforms during the years prior to COVID-19 pandemic. Indeed, quarantines and mobility restrictions, imposed by national authorities in direct response to this pandemic, forced people to stay at home, and this fact encouraged a higher consumption of VOD platforms.

Netflix is the most popular platform, and was the first to reach a significant presence of all the VOD services offered in Chile⁴. A study published in January 2021 indicated that from the group of people subscribed to streaming services, 41,9% had just one subscription, 30,1% had two, 15,4% three and 3,3% has cancelled the subscription⁵.

4 The study Chile 3D from GfK Adimark identified that Netflix had a home penetration of 35% in 2018 (report from September, 2018) and of 51% in 2020 (report from May, 2020).

5 Streaming in Chile: the battle to come, done by the Agency Jelly. Available in <https://www.jelly.cl/streaming-en-chile/>

The same study shows that Netflix is the VOD platforms preferred by the group already mentioned, it is present in 88,7% of Chilean homes, followed by Prime Video (40%), Disney+ (23,3%), HBO GO (17,6%), CDF Estadio (8,1%) and others (11,3%). It is important to highlight that Disney+, which reached the third place, was just launched in August, 2020.

3.2. VOD analysis in 2020: national and Ibero-American fiction premiere

Table 6. Ibero-America and national fictions screened on VOD systems in 2020

National titles premiere (2)	14. <i>Secreto Bien Guardado</i> (serie - Argentina)
Prime Video	15. <i>3%</i> (serie - Brasil)
01. <i>El Presidente</i> (series - Chile)	16. <i>Buenos Días Verónica</i> (serie - Brasil)
02. <i>La Jauría</i> (series - Chile)	17. <i>Coisa Mais Linda</i> (serie - Brasil)
Ibero-American titles premiere (56)	18. <i>El Reto del Beso</i> (serie - Brasil)
Prime Video	19. <i>Espectros</i> (serie -Brasil)
01. <i>Caronte</i> (series - Spain)	20. <i>Omnisciente</i> (serie - Brasil)
02. <i>Desaparecidos</i> (series - Spain)	21. <i>Reality Z</i> (serie - Brasil)
03. <i>El Cid</i> (series - Spain)	22. <i>Amar y Vivir</i> (serie - Colombia)
04. <i>Pequeñas Coincidencias</i> (series - Spain)	23. <i>Chichipatos</i> (serie - Colombia)
05. <i>Backdoor</i> (series - Mexico)	24. <i>El Robo del Siglo</i> (serie - Colombia)
06. <i>Cómo Sobrevivir Soltero</i> (series - Mexico)	25. <i>La Reina de Indias y el Conquistador</i> (serie - Colombia)
07. <i>De Brutus, Nada</i> (series - Mexico)	26. <i>La Reina del Flow</i> (telenovela - Colombia)
08. <i>El Candidato</i> (series - Mexico)	27. <i>La Venganza de Analía</i> (serie - Colombia)
09. <i>Pan y Circo</i> (series - Mexico)	28. <i>Siempre Bruja</i> (serie - Colombia)
Claro	29. <i>100 Días para Enamorarnos</i> (serie - EE.UU. hispanos)
10. <i>Hijos de su Madre</i> (series - Mexico)	30. <i>Enemigo Íntimo</i> (serie - EE.UU. Hispanos)
11. <i>R</i> (series - Mexico)	31. <i>Esta mierda me supera</i> (serie - EE.UU. Hispanos)
Netflix	
12. <i>Casi Feliz</i> (serie - Argentina)	
13. <i>Puerta 7</i> (serie - Argentina)	

Ibero-American titles premiere (cont.)	
32. <i>Falsa Identidad</i> (telenovela - USA)	52. <i>La Casa de las Flores</i> (serie - México)
33. <i>No Te Puedes Esconder</i> (series - USA)	53. <i>La Piloto</i> (serie - México)
34. <i>El Desorden que Dejas</i> (series - Spain)	54. <i>Monarca</i> (serie - México)
35. <i>El Sabor de las Margaritas</i> (miniserie - España)	55. <i>Narcos México</i> (serie - México)
36. <i>Elite</i> (series - Spain)	56. <i>Oscuro Deseo</i> (serie - México)
37. <i>La Casa de Papel</i> (series - Spain)	
38. <i>La Valla</i> (series - Spain)	Coproducciones de estreno (6)
39. <i>Las Chicas del Cable</i> (series - Spain)	Prime Video
40. <i>Los Favoritos de Midas</i> (miniseries - Spain)	01. <i>Dignidad</i> (serie - Chile, Alemania)
41. <i>Perdida</i> (series - Spain)	02. <i>Inés del Alma Mía</i> (serie - España y Chile)
42. <i>Toy Boy</i> (series - Spain)	Movistar
43. <i>Valeria</i> (series - Spain)	03. <i>Dime Quién Soy</i>
44. <i>Vis a Vis</i> (series - Spain)	(serie - España y EE.UU. Hispanos)
45. <i>Vivir Sin Permiso</i> (series - Spain)	Netflix
46. <i>Bolívar</i> (telenovela - Mexico)	04. <i>Selena: la serie</i>
47. <i>Control Z</i> (series - Mexico)	(serie - México, EE.UU. Hispanos)
48. <i>Desenfrenadas</i> (series - Mexico)	05. <i>Alguien tiene que Morir</i>
49. <i>Diablero</i> (series - Mexico)	(miniserie - España, México)
50. <i>El Dragón: El Regreso de un Guerrero</i>	06. <i>White Lines</i> (serie - España, RU)
(serie - México)	
51. <i>Historia de un Crimen: La Búsqueda</i>	GRAND TOTAL: 64
(miniserie - México)	

Source: *Obitel Chile*

At the beginning, the presence of Latin American productions on VOD platforms was limited to titles already broadcast on TV or shown in cinemas, but the number of titles especially produced for these platforms or in alliance with TV channels has grown. In the case of Chile, it is important to mention that four national titles included in table 6 are Prime Video productions and two are co-production with other countries.

Even though, it cannot be categorized as a serial fiction, it is important to mention that in 2020 Chile released its first film on Netflix, *Nadie Sabe que Estoy Aquí*, which was produced exclusively for that platform.

Table 7. Fiction premiere on VOD in 2020 by country of origin

Country	Titles	%
NATIONAL (total)	4	6%
OBITEL COUNTRIES(total)	60	94%
Argentina	3	5%
Brazil	7	11%
Chile	2	3%
Colombia	7	11%
Ecuador	0	0%
Spain	16	25%
USA Hispanic	5	8%
Mexico	18	28%
Peru	0	0%
Portugal	0	0%
Uruguay	0	0%
Venezuela	0	0%
CO-PRODUCTIONS (Total)	6	9%
National Co-productions	2	3%
Obitel countries Co-productions	4	6%
GRAND TOTAL	64	100%

Source: Obitel Chile

The pandemic attributed a new role to VOD platforms different from TV fiction: not to compete with but to replace cinemas. The closure of cinemas prevented the release of dozens of films. After the initial confusion, it was realized that the closures would be for a long time. Both, film distributors and cinemas had to create mechanisms to keep the industry working and to find an income source different to ticket sell.

Likewise, they look for a way for creators to release their works already done. For this purpose, platforms different from those that required subscriptions and with a business model based on pay per view were created. In Chile, these options were offered by Cining and Punto Play, and on them 34 films were premiered, faced to the impossibility of their release in cinemas: *Algunas Bestias*, *Álvaro: Rockstars Don't Wet the Bed*, *Amukan*, *Camila Moreno: Pangea*, *Consuegros*, *Distancia Social*, *El Agente Topo*, *El Negro*, *El Origen del Cielo*, *El Príncipe*, *El Sabio de la Tribu*, *El Viaje Espacial*, *El Viejo del Poncho*, *Enigma*, *Esto es Spitfire!*, *Harley Queen*, *Haydee y el Pez Volador*, *Historia de mi Nombre*, *La Casa*, *La Cordillera de los Sueños*, *Lina de Lima*, *Los Jaivas: Todos Juntos*, *Matar a Pinochet*, *Mientes*, *Mi Norte es el Sur*, *Nona*, *Si Me Mojan*, *Yo los Quemo*, *Nunca Subí El Provincia*, *Parío y Críao*, *Piola*, *Santiago – Italia*, *Sobre los Muertos*, *Sumergida*, *Tengo Miedo Torero*, *Vendrá la Muerte and Tendrá tus Ojos*. Although it is true that these titles are not serial fiction, their forced appearance reveal changes in the relation between the public and the VOD platforms.

4. Fiction and audience's participation in digital environment

From the mid '90 of last century to the first decade of this one, *telenovelas* from the public channel, TVN, led the audience and are remembered by those who, during those years, gathered as a family in front of the TV, after school or returning from work. These maybe were the last years when *telenovelas* also had a time function in Chilean TV viewers' day.

Telenovelas were preceded by magazines that prepared audiences to "close the day" and, then they, in turn, delivered to prime time

news the highest ratings. During the pandemic, the repeat of several productions was not limited to free-to-air reception, analogical or digital, but also to web platforms from some channels. National Television of Chile took advantages of this situation to make available a dozen of titles from that time: Oro Verde (1997), Estúpido Cupido (1994), Romané (2000), Rompecorazón (1994), La Fiera (1999), Amores de Mercado (2001), El Circo de las Montini (2002) y Cómplices (2006), among others (El Contraste, 2021).

In 2017, the public station opened a YouTube channel called *Teleseries y series / TVN* and, at the time this report was prepared, had more than 751 million visualizations. It is not an exclusive initiative emerged from the pandemic, and, when the number of interactions generated by the channel in the section Community are counted, it is evident that it is not an organic strategy to reach new audiences and to interact with them: in 2019 and 2020 just 17 messages were sent to YouTube channel's subscribers. In any case, the 11 messages published in 2020 announcing new titles on the channel doubled the frequency from the two previous years. Series and *telenovelas* are organized by playlist, but each video also has direct access, facilitated by a nomenclature including title, number and title of the episode and the year. This information is also visually included in the image *thumbnail*.

The resto of Chilean open TV channels does not have a YouTube channel exclusive to its fiction production. While it may be possible to have access to some titles, they are mixed up with other kind of programs like morning-time slot and comedy shows. This is the case of Mega, unlike TVN, its YouTube channel presents a higher interaction with the audience in the section Community. In this segment, it encourages people to subscribe and promotes exclusive programs for its members. As TVN, thumbnails of the videos from Mega YouTube

channel show the *telenovela* isotype and typographically the chapter number. Both take one third of the image, and this suggest the channel strategy to promote the access to its fiction contents online through the home and video section.

The resto of national open TV channels is different. Their YouTube channels are just used to promote their fiction contents. In the case of Chilevisión, there is just access to some programs based on franchises such as *La divina comida* o *Yo soy Chile*. On the contrary, Channel 13 includes posters promoting the new prime time *telenovela* and it has its own channel dedicated to the station file production, called RecTV, where segments from old *telenovelas* can be found. However, as it happens in other countries, it is possible to have access to national fiction through individual accounts not linked to any production company or to the rightsholders channel.

5. Highlights of the year: the case of Stories of Quarantine

Historias de Cuarentena has been selected as the highlight of this year, because it has been designed and produced during a year, 2020, marked by the Covid-19 pandemic, and it managed to be among the ten most watched titles of the year.

In order to examine *Historias de Cuarentena* a narratological analysis has been made, as well as interviews to five TV agents related to its production. Their names and careers are described in the following table.

Table 8. Interviewees for the analysis of *Historias de Cuarentena*

NAMES	POSITION IN <i>Historias de Cuarentena</i>	ROLE IN THE TV INDUSTRY
Daniela De Micheli	Executive producer	Producer renowned for her large experience , noted for her work on <i>La Fiera y Papá a la deriva</i> , among others.
Nicolás Alemparte	Main director	Director of several <i>telenovelas</i> such as <i>Aquí Mando Yo</i> and <i>Perdona Nuestros Pecados</i> , among others
María Eugenia Rencoret	General Director of Dramatic Area, MEGA	Director and Executive in charge of the Dramatic Area in both Mega and TVN. Noted for her work in <i>Amores de Mercado</i> and <i>Vuelve Temprano</i> , among others.
Rodrigo Cuevas	Script Chief	Script writer of successful shows as <i>Los 80</i> and <i>Sres. Papis</i> .
José Fonseca	Co-script writer	<i>Telenovela</i> script writer from channel 13, TVN, Chilevisión and Mega. Noted by his work in <i>Isla Paraíso</i> and <i>Yo Soy Lorenzo</i> .

Source: *Obitel Chile*

Rodrigo Cuevas' idea was conceived taking into account the production conditions resulting from the pandemic's crisis, and it was brought into being instinctively. "In March, the sanitarian crisis and the pandemic were starting, and the true is that I started getting a little anxious creatively speaking. I was working on a TV series to broadcast in 2021, and the feeling of lack of reality became heavier. And it was in this context, thinking about "what can be done" under these circumstances that the idea appeared". It was thanked to the pandemic that this kind of product was broadcast, so

There was a big necessity to contribute based on the experience we were going through and to keep generating contents. That's how I came

up with this project, which probably otherwise would not have never been broadcast on open TV (Cuevas, 2020).

María Eugenia Rencoret maintains that *Historias de Cuarentena* was conceived thinking about the need to keep the connection with the “audience’s emotions in [those] difficult moments, focusing the content on the contingency, and giving the depth of the dialogues the character of leading role. On the other hand, Daniela de Micheli specified a practical and concrete need “of doing a new content for Mega, a contemporary one, that people will identify with”.

The plot was quickly structured and the project was born with “a contingency calling”, instead of being based on a big love story. This meant eliminating the coherence around the love story, which was developed in a superficial way, and changing the traditional nature of support roles; now they were neither connected to each other or associated to the love story of the leader roles.

The key issue was that all the stories “were connected, in a high percentage, to the pandemic, without caring that later one could find some conflicts closed to the pandemic” (Alemparte, 2020). This way, plots, usually a priori defined, had to be done in process, because even if there was a concrete argument related to some characters, “news events, with the support from journalistic research”, were an important source to develop the stories.

Unlike traditional *telenovelas* format that usually has between 90 and 120 chapter already written, broadcast according to TV programs decisions, *Historias de Cuarentena* just had 36 chapters, broadcast between April, 20 and July, 1. This required the dramatic arc of the fleeting love story to be developed more expeditious and with few conflicts, and distance and confinement became the main antagonists instead of villains.

The previous statement can be probed by disaggregating the 36 chapters. Topic emerged in the world as well as in Chile, such as the sociological impact of the pandemic (Pizarro, 2020), intra-family violence (Gámez, 2020), elderly (Azaret, 2020) and crisis of couples (Pais, 2020) were addressed in the first 12 chapters.

At the time of creating the characters and the fiction, they were very, very determinant and very decisive (...) Besides the lead characters, we had to incorporate others that enabled us to address other issues that were emerging (Cuevas, 2020).

This can be seen all through the second group of chapters, where the closure of stories involving support characters gave way to different topics and to a new couple. A story about a woman reporting her husband for domestic violence is also closed.

The third part presents more touching breakdowns related to the love story, when the leader couple visualizes a possible date after the lockdown is over, ending the story with a hope note. It should be noted that the pandemic did not just affect the creative and narrative areas, it also affected the ways of productions. The shootings took place.

Just before the broadcast, because we needed the reality to nourish the stories (...) thus characters could be close as possible to reality (Alemparte, 2020).

Additionally, the shootings had to be done through zoom, and actors had to record from homes and then send the recordings for edition.

At the beginning, I took over of all technical aspects, of how we could do it, how we were going to shoot, which format we were going to use and how the broadcast was going to be (...) Not only we had to shoot but also edit, musicalize...and all that; more of less the same thing that need to be done for a TV series, had to be done for *Historias de Cuarentena*. (Alemparte, 2020).

6. Theme of the Year: effects of the pandemic on the creation, production and narrative of *telenovelas* in Chile⁶

Since the sanitarian crisis brook out in Chile, the pandemic resonated in different spaces, and social distancing implied the closures of many spaces, organizations and entities in order to avoid contagion. Chilean TV industry was particularly affected not just for the impossibility of physically connecting with actors and actresses, but also because, due to reduced capacity, it was not possible to put the necessary crew together for producing and shooting contents, not including the limitations screenwriters had to face in terms of creation and wiring. The recording studios of the most attractive channel for fiction production, Mega, stopped the shooting on March 18, 2020, leaving some *telenovelas* unfinished, as was the case with *Yo Soy Lorenzo* or ceasing the recording for an indefinite time, as it happened to *Verdades Ocultas*.

6 The information was obtained from interviews done to people working for the production, script, direction and *telenovelas* acting areas. At their request, their names are not included.

This is how Chilean fiction fell into a crisis affecting the most important audiovisual product in Latin America: *telenovela*. While Chilean screens kept repeating old *telenovelas* and imported TV productions, new products were scarce. In 2020, 31 national productions and 11 foreign productions were rebroadcast. National ones included *telenovelas*, series and *Unitary*, and some had more than 15 years. *Telenovelas* continued to be the most watched program from the programming grid (Reyes, 2020), and several referent people from the industry attributed this fact to the audience's necessity of holding up in familiar stories that would help in moments of uncertainty and anxiety (Tapia y Reyes, 2020).

However, the clear lack of new contents was noticed. This encouraged the creation of a *telenovela* explicitly linked to the reality and to the news events, complying with all the highest production standards for a *telenovela*: *Historias de Cuarentena: psicología online*.

The lack of new contents and the faster consumption of all the contents in the programming grid accelerated the creative process that usually lasts months and culminates in the creation of a “bible”, based on an argument structured around a love story (Sepúlveda, 2003). In the case of *Historias de Cuarentena* this path changed, and the axis of a *telenovela*'s argument, which is usually integrated by four matrices from the classical melodrama -desire/impediment, inter social classes, disregard/recognition, civilization/barbarism (Fuenzalida, Corro & Mujica, 2009) – was omitted to produce a hybrid between series and *telenovela*.

Later, when the sanitarian measures were eased, the shooting of new premieres as *Demente*, which has been written in 2019, and *Edificio Corona*, a *telenovela* with some comic interludes that takes place in a building during the pandemic, restarted

In order to protect TV workers some protocols were implemented, including COVID-19 tests (PCR) every 72 hours, temperature reading during shooting, the supply of mask on the arrival and for re-change and alcohol gel dispensers. The masks have to be worn during all the rehearsals; they can only be removed for the shooting. All these procedures are undertaken by medical staff who is always present.

The capacity of rooms for costumes, make-up and hairstyles is limited in order to guarantee social distance. Workers from those areas have to use protection masks and other special accessories to avoid contact. Additionally, each actor needs to have his own makeup case and other personal materials cannot be mixed.

Sets are frequently sanitized. In parallel, all staff members have to go out for air, and on their return, they need to go through the sanitizing procedures again.

Even if all these procedures have implied a higher spending of time, people interviewed agreed on how these requirements have been properly internalized, and complete the work on expected time has been possible. Shooting schedules became shorter to avoid long contacts.

In general, people interviewed positively valued the implementation of all these procedures. They feel safer and, in consequence, they are willing to continue despite all. It is important to take into consideration the economic instability of employees from the culture sector, who have particularly suffered as a result of limitations imposed by the pandemic.

From the audiovisual fiction point of view, protocols implied less changes. Intimate and kisses scenes were reduced to their minimum expression. Just those essential for the dramatic plot are recorded, and are scheduled for the day after the medical tests. Something similar happen to crowded scenes. Outdoor and nights recordings have been reduced according to quarantine protocols and curfew implemented in different parts of the city.

This has involved scrips changes since what has been written was not authorized to be recorded. Some interviewees considered this limitation a minor problem, but for others was a very complex issue. Nevertheless, all agreed that the works have been well received by the public as it has been reflected in rating levels.

This success is attributed to the ability to reflect the reality and the difficulties caused by the pandemic on fiction productions. In the case of *Edificio Corona* this has be done incorporating tender and comedy moments, besides the fears associated to the pandemic context. Until the writing of this article no COVID-19 case related to shooting has been reported.

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3

**COLOMBIA: THE RERUN AS A LEADING PLAYER IN
TIMES OF PANDEMIC**

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Introduction

The year 2020 was completely atypical on a global level and will surely go down in history as a period of crisis, uncertainties, and profound changes in the habits of life and societies around the world. Thus, after the declaration of a pandemic in relation to the Sars Cov 2 virus and the COVID 19 disease, the globe faced an unexpected challenge represented in the declaration of quarantines, confinements and a whole set of public health measures in the midst of the anguish which took place

before the increase in occupation of Intensive Care Units, the collapse of hospitals and, despite current high levels of technological advances, the lack of knowledge regarding measures for the containment, prevention and management of the virus. In the Colombian context, after the first case was detected on March 6, 2020, a system of measures led by different government decrees and regulations came into operation, such as decree 457 of March 22, 2020, decree 637 of May 6, 2020 and decree 417 of March 17, 2020, in which not only was the State of Emergency declared at the national level but also different strategies were generated such as generalized confinement, restrictions on mobility and, at the same time, different productive, educational and social activities were suspended.

The small screen was not alien to the situation, on the contrary, television grills began to be populated with long-term information programs and, at the same time, fiction became the companion of Colombian households, as well as a kind of escape from the counts of deceased and infected reported daily. Similarly, platforms such as Netflix, Amazon Prime and the arrival at the end of the year of Disney + together with systems such as HBO + and spaces such as Claro Video, also became alternatives to accompany the moments of anguish and uncertainty of people confined in their houses. Hence, after the debate on the percentage of screen time for national productions, the appearance of *reruns* as protagonists of *prime time* was allowed not only because they appeal to nostalgia, but also for that dose of humor, wit and entertainment that allowed viewers to leave aside, at times, the complexity of an epidemiological and social reality in which, along with the growth of the peaks of the disease, red flags also proliferated in the windows as a symbol of the economic crisis of the most vulnerable.

Thus, 2020 was presented in Colombia as a year of confinement, as in the rest of the world, but also, in the case of television fiction, a period to revisit the productions of other times, both on the small screen as in television *streaming* systems, generating such curious phenomena such as that *Pasión de Gavilanes* was the most watched fiction both on national television and on Netflix at the same time. And parallel to this, the flourishing of new productions and web series as a refuge for actors, actresses and even a new setting for theater and an industry such as the audiovisual industry that, along with others, was entering in an agonizing recess.

1. The audiovisual context of Colombia in 2020

1.1. Open television in Colombia

Open television in Colombia is made up of five national channels distributed as follows:

Chart 1. National Open Television Networks / Channels in Colombia

Private broadcast / channel (3)	Public broadcast / channel (2)
Caracol	Señal Colombia
R.C.N.	Canal Institucional
Canal Uno	
TOTAL CHANNELS = 5	

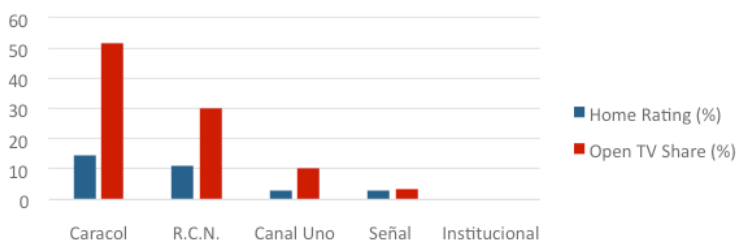
Source: Obitel Colombia

In times of pandemic, Caracol assumes a leadership position again among the audiences, reinforced by informative spaces and the

abundance of *reruns* that managed to position themselves primarily in *prime time* during 2020.

Graph 1. TV Rating and Share by Station

Channel	Home Rating (%)	Total TV Share (%)	Open TV Share (%)
Caracol	14,5	45,1	51,6
R.C.N.	11,3	35,1	30,4
Canal Uno	3,1	9,6	10,6
Señal	2,9	9	3,32
Institucional	0,4	1,2	0,75
TOTAL	32,2	100	96,6

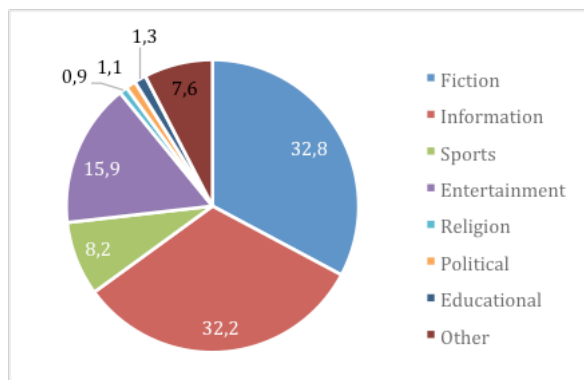


Source: Obitel Colombia / Kantar Ibope Media Colombia

The previous graph shows the considerable growth in both *rating* and *share* in the case of Caracol compared to RCN, mainly due to the high presence of *reruns* and the ability to attract audiences, this was achieved through informational spaces, primarily the news, which increased the duration of its emissions in times of pandemic. This way, the evening news not only became the program with the highest audience, but also the drag element towards the *prime time* which was covered by productions that were successful in other time frames such as *Pasión de Gavilanes* and *Pedro El Escamoso*.

Graph 2: Genres and Hours Broadcasted in TV Programming.

Genres Broadcast	Screening hours	%
Fiction	21.317:30	32,8
Information	20.870:30	32,2
Sports	5.237:20	8,2
Entertainment	10.355:30	15,9
Religion	630:30	0,9
Political	770:20	1,1
Educational	870:20	1,3
Other	4.987:25	7,6
TOTAL	65.036:25	100



Source: Obitel Colombia

Because of the global situation caused by the pandemic, 2020's television offer was filled with news and fictions. This since the sporting, musical and cultural events were not held for much of the year, leaving that television space to fiction and especially to information spaces that became the companions of a large portion of the audience's day; which was reflected in the increase of the news broadcasts which became spaces of more than three hours long.

1.2. Pay TV and VoD platforms in Colombia

During the global situation experienced in 2020 where extended quarantines were a common, if not total, phenomenon, pay television platforms and videos on demand became the main entertainment bet for consumers. Thus, according to a report developed by Sherlock Communications on the consumption of PayTV in Latin America, 48% of Colombians subscribed to one of the available streaming platforms, while 20% decided to access two of these services. The sample shows the increase in these entertainment systems that, despite the economic difficulties caused by the pandemic, are an indispensable mass consumer product in homes.

Added to this phenomenon are the possibilities of exclusive content platforms offered by cable operators, mainly Claro Video, a service that allows all subscribers of this company to access series and movies that are not offered in the traditional service. On the other hand, for 2020 the arrival in Colombia of the Disney+ platform stands out, which generated a high demand for subscriptions under the premise of finding exclusive entertainment content, from the classics to the series developed exclusively for this space. Amazon Prime also spread as another coveted option, however, Netflix continues to be the preferred platform in the country.

Chart 2. Pay television channels in Colombia

10 most viewed Pay TV channels in 2020
1) Fox (Series Movies), 2) TNT (Series Movies), 3) Space (Series Movies), 4) HBO (Series Movies), 5) Golden (Series Movies), 6) Fox, 7) Sports (Sports), 8) ESPN (Sports) 9) WIN Sports (Sports), 10) NTN 24 (News), 11) Cable noticias (News)
TOTAL: 8 news channels

Source: Obitel Colombia

In Colombia there is a very particular situation, and it is that channels included in payment packages stand out, mainly those related to sporting and fiction content. This is directly related to Colombians' taste for sports content, mainly soccer. During 2020, controversy broke out when the WinSports+ channel became the only channel that broadcasted all the matches of the Colombian professional soccer league, since in general, the costs were considered high by users, and it also opened the discussion of what should be part of open television.

Chart 3. VoD in Colombia

Top Active VoD Platforms in 2020	Total
Netflix, Disney+, Prime (Amazon), HBOGo (Warner Media), FOX+ (Disney).	5
TOTAL	5

Source: Obitel Colombia

During the year 2020 in Colombia, the rising curve in the consumption of streaming platforms was maintained, mainly of the Netflix platform, which has had such a reception that it has remained in the first place of consumption in the country and has led to the establishment of new marketing dynamics, even including the possibility of consuming this service in a prepaid mode through cards that are sold in different technology and chain stores. On the other hand, although there are no official sources on this modality, there are possibilities in social networks for the commercialization of informal accounts in which the costs of access to this and other streaming platforms are much lower.

Within the dynamics of the country, it is also highlighted that there are open television channels that offer additional services that can be accessed as a paid service, such is the case of the Caracol Play VoD system which is part of the Caracol Televisión channel that works

as an open channel. Added to this modality is the one where consumers have the possibility of accessing additional services such as the HBO and FOX + networks as part of the benefits for acquiring pay television plans, an example of this is Claro Video, a platform that works as a benefit for users of Claro's pay television.

1.3. **Television fiction independent production companies**

The phenomenon presented during the quarantine of 2020 in the world leaves a trend in the behavior of these companies that, within the new possibilities, have advanced towards the elaboration of productions with a load of creativity and new ways of developing the process. Among the trends that were evidenced in the case of Colombia, are those from which independent production companies developed projects related to the development of pieces suitable for broadcasting through free platforms, especially YouTube. Ideas arose which allowed those situations that families were being part of in the day-to-day life of this time to be shown on screen, samples of this are found in series such as: "*Una familia en cuarentena*" or "*Aisla2 en cuarentena*" and products developed by some YouTubers focused on this topic.

From this exercise, productions also emerged that, taking advantage of the historical moment, together with large companies and production companies, worked together on miniseries to be broadcast on different digital media and from which the brand was advertised, but the narrative dynamics of fiction productions were maintained. One case to highlight from this exercise is the series "Vidas posibles", broadcast on its own website as a result between the French brand of vehicles Renault and the producer Fox Colombia. Considering the creative work, a result of the quarantine, it can be deduced that although the effects on the television industry, in general, were very negative, there were examples of new dynamics that set the process and allowed giving life to different and entertaining productions for the public.

1.4. Sources of financing for the audiovisual sector

The year 2020 was a particularly difficult year for all economic sectors directly affected by the extended quarantines and the effects of the global pandemic, however, some sectors were also favored given the confinement conditions in which consumers found themselves. A clear example of this is the subscription television sector, which according to *flash data* issued by the Communications Regulatory Commission (CRC) on April 12, 2021, had a strong boost in the consumption of its services, “during the year 2020, the revenues associated with the subscription television service reached COP \$3.26 billion, which represented a growth of 2.13% compared to 2019. On the other hand, the subscribers of this service reached 6.06 million, presenting an increase of more than 131 thousand subscribers when compared to 2019”. Although these figures apply exclusively to basic plans, an increase in access to these services is evidenced. Finally, the 6.56% of investment made in pay TV registrations correspond to premium services.

On the other hand, the Ibope report regarding television consumption in Colombia, reflects that during 2020 an investment in advertising of \$4,613,625,671 was made on open television channels, taking the first place of investment in advertising the broadcast of Caracol Televisión *prime time* with a sum of \$270,891,529. Other sources of financing for Colombian television are related to the access to exclusive content systems of open television channels and new trends in fiction-related productions carried out in alliance between large commercial brands and production companies that take advantage of the specific situation of the pandemic.

1.5. Communication policies

Law 182 of 1995 came into force on January 20, 1995, which regulated the television service and formulated policies for its develop-

ment. However, due to the situation generated by covid-19, the national channels were forced to cancel and stop filming and productions, due to the confinement measures decreed by the National Government. To aggravate the situation, the Decree 516 of April 4, 2020, was issued on April 4, 2020, in which the share of the national programming screen was reduced to 20%. The addition of a second paragraph to article 33 of Law 182 of 1995, established that, according to the duration of the state of emergency, the minimum percentages of national programming would be 20% in the *prime-time* slot, a considerable reduction for an industry subjected to the rigors of the pandemic.

The above situation led the country's audiovisual sector to wonder why in times of emergency, when work is scarce, support and incentives for audiovisual production in the country are reduced? Discontent did not take long and organizations such as the ACA (Colombian Association of Actors) and the ACTV (Colombian Association of Audiovisual Industry Workers), stated that the reduction of participation in the screen quota to 20%, reduced not only national productions, but the income that librettists, producers, and actors received in times of confinement due to the retransmission of national productions, thanks to laws such as Pepe Sánchez or Fanny Mikey. Among the different unions of the audiovisual sector, a generalized discontent was promoted, against the decree issued by the Ministry of Information and Communication Technologies (MinTIC) headed by Minister Sylvia Constaín, who stated that the measure taken was temporary, however, for the different unions this measure ignored the needs of the sector. Thus, a movement was born against the Duque government's "orange economy" program, which under the hashtag #MuchaPantallaPocaNaranja mobilized different actors, producers, and librettists in the country¹. This finally led to the so-called screen quota being

1 Gaceta (2020). Sigue polémica por decreto que baja cuota de producciones nacionales en la tv, El País.com, April 26, 2020, consulted April 11, 2021. Available in <https://www.elpais.com.co/cultura/gaceta/la-tv-colombiana-esta-rota-asi-va-la-polemica-por-el-decreto-que-baja-la-cuota-de-pantalla.html>

maintained, which resulted in the appearance of a large group of *reruns* that became the protagonists of *prime time*.

1.6. Digital and mobile connectivity infrastructure

Among the technological changes that the country has experienced in recent decades, is the implementation of Digital Terrestrial Television - DTT which, through an external decoder connected to old televisions or an internal in more recent models, made it possible to access high-definition television in 80% of the national territory by 2020, according to figures issued by MinTIC. The webpage tdtparatodos.tv, defines December 31, 2021, as the deadline for the implementation of DTT in 100% of the national territory since analog broadcasts will be suspended.²

Another situation that has been presenting transformations in the ICT sector is related to the provision of mobile and internet services. In this regard, the Communications Regulation Commission points out that there are 8 companies in charge of this service in the country, these are: Avantel, Claro, ETB, Éxito Móvil, Movistar, Tigo, Uffmovil and Virgin Mobile. According to the Opensignal report published in January 2021, of the mentioned companies, Tigo was positioned as the best company to offer connectivity services by achieving 6 of the 7 recognitions granted by this mention, surpassing Claro, who has dominated the scene in recent years.³

In this panorama, there is the emergence of a new competitor within the telecommunications market called “Wom” that by 2020 promised to consolidate itself as one of the best connectivity companies in the country. According to Chris Bannister, director of Wom for

2 Tdtparatodos.tv. 31 de diciembre de 2022 es la fecha límite para el cese de emisiones analógicas de televisión, □consulted April 11, 2021. Available in <https://www.tdtparatodos.tv/noticias/colombia-avanza-proceso-migracion-tdt>

3 Portafolio (2021). ¿Cuál es hoy el operador con mejor internet móvil en Colombia?, 04 de febrero de 2021, consulted April 11, 2021. Available in <https://www.portafolio.co/negocios/empresas/cual-es-el-operador-de-telefonía-con-mejor-internet-movil-en-colombia-548832>

Colombia, an investment of more than a billion dollars is expected during the next 5 years in network coverage, technology, and customer service. However, among the different controversies that the arrival of this new operator has endured, the competitiveness outlook is discouraging, since Claro is the mobile service provider that accumulates the most lines in the country with 31.2 million lines, followed by Movistar with 15.9 million and Tigo, with 11.8 million.⁴

2. Analysis of the year

Table 1. Fictions exhibited in 2020 (national and imported; premiere, reruns, and co-productions).

<p>NATIONAL UNPUBLISHED TITLES - 8 TITLES</p> <p>Canal CARACOL– 4 Titles</p> <ol style="list-style-type: none"> 1. <i>Amar y Vivir (Telenovela)</i> 2. <i>La Ley Secreta (Series)</i> 3. <i>El General Naranjo (Series)</i> 4. <i>La Venganza de Analía (Telenovela)</i> <p>Canal 1– 1 Title</p> <ol style="list-style-type: none"> 5. <i>Anibal Sensación Velásquez (Telenovela)</i> <p>Canal RCN –3 Titles</p> <ol style="list-style-type: none"> 6. <i>Pa quererte (Telenovela)</i> 7. <i>Confinados (Series)</i> 8. <i>Verdad Oculta (Series)</i> <p>CO-PRODUCTIONS – 1 TITLE</p> <p>Canal 1 –1 Title</p> <ol style="list-style-type: none"> 1. <i>Decisiones (Series)</i> <p>OBITEL UNPUBLISHED IMPORTED TILES – 4 TITLES</p> <p>Canal CARACOL 3 Titles</p> <ol style="list-style-type: none"> 1. <i>Cuna de Lobos (Telenovela-Mexico)</i> 2. <i>Imperio de Mentiras (Telenovela- Mexico)</i> 3. <i>La Usurpadora (Telenovela- Mexico)</i> <p>Canal RCN 1 Title</p> <ol style="list-style-type: none"> 4. <i>Te doy la Vida (Telenovela-México)</i>
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4 El Tiempo (2020). Wom, el nuevo operador que llega a dinamizar la telefonía móvil, El Tiempo.com, 03 de noviembre de 2020, consulted April 11, 2021. Available in <https://www.eltiempo.com/tecnosfera/novedades-tecnologia/wom-el-nuevo-operador-que-llega-a-dinamizar-la-telefonía-movil-en-colombia-546711>

NOT OBITEL UNPUBLISHED IMPORTED TILES – 0

Does not apply

RERUN TITLES - 35 TITLES

1. *Allá te Espero (telenovela)*
2. *Amor en Custodia (telenovela)*
3. *Contra las Cuerdas (telenovela)*
4. *Doña Bella (telenovela)*
5. *En Tierras Salvajes (telenovela)*
6. *Enfermeras (telenovela)*
7. *La Traicionera (telenovela)*
8. *Chepe Fortuna (telenovela)*
9. *Cuando me Enamoro (telenovela)*
10. *El Inútil (telenovela)*
11. *Francisco el Matemático (telenovela)*
12. *Soy tu Dueña (telenovela)*
13. *Teresa (telenovela)*
14. *3 milagros (telenovela)*
15. *Amor Sincero (telenovela)*
16. *Diomedes Cacique de la Junta (telenovela)*
17. *El Joe la Leyenda (telenovela)*
18. *Hasta que la Plata nos Separe (telenovela)*
19. *La Hija del Mariachi (telenovela)*
20. *Los Reyes (telenovela)*
21. *Yo soy Betty la Fea (telenovela)*
22. *Abismo de Pasión (telenovela)*
23. *Corazón Indomable (telenovela)*
24. *El Cuerpo del Deseo (telenovela)*
25. *La que no podía Amar (telenovela)*
26. *Un refugio para el Amor (telenovela)*
27. *Bellas Calamidades (telenovela)*
28. *Cuna de Lobos (telenovela)*
29. *La que no Podía Amar (telenovela)*
30. *Lo que la Vida me Robó (telenovela)*
31. *Rubí (telenovela)*
32. *La Nocturna (telenovela)*
33. *Pasión de Gavilanes (telenovela)*
34. *Pedro el Escamoso (telenovela)*
35. *Rafael Orozco el Ídolo (series)*

TOTAL OF NATIONAL UNPUBLISHED TITLES: 8

TOTAL OF OBITEL UNPUBLISHED TITLES: 4

TOTAL OF UNPUBLISHED TITLES (NATIONAL AND OBITEL): 12

In 2020 the number of *reruns* increased considerably compared to unpublished titles, largely due to the regulations of national production's screen quota and that, given the impossibility of recording and production, this meant that some fictions would cease to be broadcasted since new episodes are not able to be produced (this is the case of *Pa querte*) and television grills will be filled with content from other times.

Table 2: Premiere fiction in 2020: Countries of origin

Country	Titles	%	Episodes	%	Hours	%
NATIONAL (total)	8	66,7	336	60,2	270:45:00	69,9
OBITEL COUNTRIES (total)	4	33,3	222	39,8	116:30:00	30,1
Argentina	0	0,0	0	0,0	0:00:00	0,0
Brazil	0	0,0	0	0,0	0:00:00	0,0
Chile	0	0,0	0	0,0	0:00:00	0,0
Colombia	8	66,7	336	60,2	270:45:00	69,9
Ecuador	0	0,0	0	0,0	0:00:00	0,0
Spain	0	0,0	0	0,0	0:00:00	0,0
USA (Hispanic production)	1	8,3	0	0,0	0:00:00	0,0
Mexico	4	33,3	222	39,8	116:30:00	30,1
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
CO-PRODUCTIONS (total)	1	0,0	0	0,0	0:00:00	0,0
Colombian Co-productions	0	0,0	0	0,0	0:00:00	0,0
Co-productions between Obitel countries	0	0,0	0	0,0	0:00:00	0,0
GRAND TOTAL	12	100,0	558	0,0	387:15:00	100,0

Source: *OBITEL Colombia / Kantar Ibope Media Colombia*

With regards to the countries of origin, the growth of fictions in co-production and a greater presence of Colombian productions is evident, something largely mediated by the application of the screen quota, which was full of national production from other times.

Table 3: Formats of national and Ibero-American fiction

Format	National						Ibero-American					
	Titles	%	E	%	H	%	Titles	%	E	%	H	%
Telenovela	25	67,6	2946	83,0	2482:00:00	75,3	21	60,0	2440	73,0	1854:34:48	0,6
Series	12	32,4	604	17,0	815:15:48	24,7	14	40,0	902	27,0	1249:37:00	0,4
Miniseries	0	0,0	0	0,0	0:00:00	0,0	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	0,0	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
Other (soap opera, etc.)	0	0,0	0	0,0	0:00:00	0,0	0	0,0	0	0,0	0:00:00	0,0
Total	37	100,0	3550	100,0	3297:15:48	100,0	35	100,0	3342	100,0	3104:11:48	1,0

Source: OBITEL Colombia/ Kantar Ibope Media Colombia

In the analysis of national and Ibero-American premieres, telenovelas prevail as protagonists of the television grill, mainly because of the prominence of the *rerun* that reflects a historical moment in which this was the predominant format in fiction and, the dominant panorama of the series in recent years was beginning to emerge.

Table 4: The ten most watched titles on open television

	Title	Channel	Production company	Format/genre	No. of ep (in 2020)	Time zone	Rating	Share
1	<i>Pasión de Gavilanes</i>	Caracol	Caracol	Telenovela	188	Prime	14,26	43,14
2	<i>La venganza de Analia</i>	Caracol	Caracol	Telenovela	53	Prime	12,82	36,22
3	<i>Amar y vivir</i>	Caracol	Caracol	Telenovela	69	Prime	11,85	34,58
4	<i>Pedro el escamoso</i>	Caracol	Caracol	Telenovela	160	Prime	11,30	40,88
5	<i>Pa Quererte</i>	RCN	RCN	Telenovela	137	Prime	11,26	18,87
6	<i>Enfermeras</i>	RCN	RCN	Telenovela	159	Prime	10,53	22,59
7	<i>Rafael Orozco, El Idoló</i>	Caracol	Caracol	Series	90	Prime	10,32	36,46
8	<i>El General Naranja</i>	Caracol	Fox Telecolombiana	Series	52	Prime	9,86	36,78
9	<i>Amor Sincero</i>	RCN	RCN	Telenovela	81	Prime	9,17	24,41
10	<i>3 Milagros</i>	RCN	RCN	Series	70	Prime	8,3	24
Total productions: 10				Foreign productions:				
100%				0%				

Source: OBITEL Colombia / Kantar Ibope Media Colombia

The high presence of *reruns* as the main protagonists in the rating is evident, which also allowed the telenovela to have relevance and position itself as the dominant format once again. However, among premiere fictions, Caracol's main role is once again central with the positioning of *La Venganza de Analía* above *Pa Quererte* and *Enfermeras*, which together were the only premiere fictions along with *El General Naranjo* to obtain a position among the 10 most viewed of 2020.

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

Titles	Channel	Gender %			Socioeconomic Level %			Age Range %				
		Women	Men	AB*	C*	DE*	4 to 11*	12 to 17*	18 to 24*	25 to 34*	50+*	
1 <i>Pasión De Gavilanes</i>	Caracol	48,48	38,92	42,86	48,01	47,40	118,07	76,6	84,49	85,8	39,6	
2 <i>La Venganza De Analía</i>	Caracol	25,87	20,31	48,25	50,46	35,64	46,11	26,7	32,76	43,48	22,6	
3 <i>Amar Y Vivir</i>	Caracol	36,67	32,94	33,12	39,56	38,76	6,99	11,2	4,19	5,15	5,7	
4 <i>Pedro El Escamoso</i>	Caracol	44,95	40,76	31,51	44,71	48,59	107,18	75,2	84,27	82,6	41,9	
5 <i>Pa Quererte</i>	RCN	15,43	14,49	19,00	16,47	11,35	17,97	17,9	17,97	17,97	17,9	
6 <i>Enfermeras</i>	RCN	16,03	10,92	10,19	11,27	16,22	34,95	36,6	25,4	29,78	10,7	
7 <i>Rafael Orozco El idolo</i>	Caracol	41,26	34,19	31,00	40,10	42,92	96,88	59,6	76,38	65,92	36,3	
8 <i>El General Naranjo</i>	Caracol	33,06	32,28	37,25	39,23	34,84	62,37	41,8	50,09	55,69	36,2	
9 <i>Amor Sincero</i>	RCN	24,03	18,97	29,44	20,15	7,64	20,51	24,4	24,78	20,31	21,2	
10 <i>3 Milagros</i>	RCN	24,83	19,41	7,24	18,32	29,42	24,03	30,5	41,67	22,25	17,8	

Source: OBITEL Colombia / Kantar Ibope Media Colombia

An increase in spectators of all ages and economic conditions is observed. This is due to the increase in the hours in which they stay at home due to the conditions of preventive quarantine and little interest in carrying out activities other than following the plot of a telenovela which had been broadcasted at another time in the past.

3. Monitoring of VoD 2020

The year 2020, for Colombia and other countries, was a juncture year due to the Covid-19 health emergency. This, summed to the high demand of connectivity, has led to transformations in content consumption, since the traditional way of viewing has been replaced, prioritizing access to other audiovisual entertainment platforms. Thus, digital audiences and new consumption patterns have increased thanks to the pandemic, which has further stimulated and promoted the use of Streaming platforms (Tuñón, 2021).

Therefore, a mode of entertainment as an alternative to pandemic confinement was primarily accessing *streaming* platforms. Thus, among the most watched are *reality* shows, contests, drama, and comedy (SEMANA, 2020). The main platforms in Colombia for 2020 are referenced in the following chart:

Chart 4. Main VoD platforms in 2020

Top Active VoD Platforms in 2020	Total
Netflix, Disney+, Prime (Amazon), HBOGo (Warner Media), FOX+ (Disney).	6
TOTAL	6

Source: OBITEL Colombia

Even though the above are the 5 main platforms in Colombia, cable operators such as Claro with Claro Video and other large national networks such as Caracol Play also offer their VoD services. In addition, it is worth noting the public proposal that has been forging since 2015: RTVC Play.

3.1. VoD platforms market

To pan over the magnitude of the VoD market in Colombia, it is necessary to understand that the pandemic has inevitably generated in the country, and in Latin America, an increase in the demand for streaming content. According to the *Sherlock Communications* study (2020), which finds the perceptions of 3,000 consumers from countries such as Brazil, Mexico, Argentina, Peru, and Chile, including Colombia. The latter represented 43% of respondents who said they see streaming as one of the best alternatives for quarantine. It is in this way that Colombia represents 36% of consumers who say they are dissatisfied with local channels, reason why 20% of Colombians indicated having subscribed to two different platforms and 24% are new subscribers to VoD platforms.

On the other hand, if one of the reasons why consumers prefer VoD or OTT services is considered, Disney + the most striking launch last year as mentioned, offered a range of content such as Lucasfilm and Marvel with popular programs such as *The Mandalorian*, *Muppets Now*, among others, while HBO Max had a launch with a lower profile, achieving an increase by presenting original programs such as Zack Snyder's *Justice League* and *The Flight Attendant* (ZEMOGA, 2020).

3.2. VoD analysis in 2020: national and Ibero-American premiere fiction

Considering that one of the most popular platforms after the Covid-19 pandemic was Netflix, it was possible to identify that the most viewed contents in Colombia were the *reality* shows *Jugando con Fuego*, *El Piso es Lava* and *El Amor es Ciego*, this in addition to action content such as *Misión de Rescate*, *La vieja Guardia* and *Proyecto Power*. Also, Colombians viewed more Korean content than in 2019. At the beginning of April, the most watched drama in the country was *Milagro en la Celda*. With regards to comedy, *Chichipatos* was the

most popular, along with *El Halloween de Hubie* and *Amor de calendario*. Finally, the most viewed fantasy titles were *Siempre Bruja* and *Locke & Key*. In conclusion, according to Netflix, 2020 in Colombia showed that the consumption of *realities* and action genre doubled, the visualization of Korean, Turkish and fantasy genre content tripled, and the consumption of the Romance genre increased by almost 300% (INFOBAE, 2020).

For this reason, table 6 examines the national and ibero-american fictions exhibited in 2020 in the most popular VoD systems and with the highest number of participations in Streaming entertainment productions.

Table 6. National and Ibero-American fictions exhibited in VoD systems in 2020.

NATIONAL PREMIERE TITLES	IBERO-AMERICAN PREMIERE TITLES	CO-PRODUCTIONS
<p>Netflix – N° national titles</p> <ol style="list-style-type: none"> 1. <i>Loco por vos</i> (Movie) 2. <i>Chichipatos</i> (Movie) 3. <i>Amar y vivir</i> (Series) 4. <i>Siempre bruja Season 2</i> (Series) 5. <i>El robo del siglo</i> (Series) <p>Caracol Play – N° national titles</p> <ol style="list-style-type: none"> 1. <i>La venganza de Analia</i> (Series) 2. <i>La nocturna 2</i> (Series) 	<p>Netflix – N° ibero-american titles</p> <ol style="list-style-type: none"> 1. <i>El hoyo</i> (Movie - Spain) 2. <i>Hogar</i> (Movie - Spain) 3. <i>El silencio del pantano</i> (Movie - Spain) 4. <i>El practicante</i> (Movie - Spain) 5. <i>Buenos días, Verónica</i> (Series - Spain) 6. <i>El amor es ciego</i> (Reality- Chile) 7. <i>Jugando con fuego</i> (Reality- USA) 8. <i>El piso es lava</i> (Realty -USA) 9. <i>El Halloween de Hubie</i> (Movie - USA) 10. <i>La vieja guardia</i> (Movie - USA) 11. <i>Esta mierda me supera</i> (Series - USA) 12. <i>Proyecto power</i> (Movie - USA) 	<p>Netflix – N° titles</p> <ol style="list-style-type: none"> 1. <i>Shark Tank Season 3</i> (Series – USA and Mexico)

NATIONAL PREMIERE TITLES	IBERO-AMERICAN PREMIERE TITLES	CO-PRODUCTIONS
	13. <i>Maldita</i> (Series - USA) 14. <i>Locke & Key</i> (Series - USA) Claro TV – N° ibero-american titles 1. <i>Reto Tokio 2020</i> (Series - Mexico) HBO GO – N° ibero-american titles 1. <i>Murder on middle beach</i> (Series – USA)	
Total: 7	Total: 16	Total: 1
GRAND TOTAL: 23		

Source: *OBITEL Colombia*

Out of a total of 26 series premiered in 2020 on VoD platforms, it was possible to show that seven national series were released: five on Netflix, with *El robo del siglo* being one of the most popular in Ibero-America and two series premiered on Caracol Play. The □ Ibero-American premiere titles were 15: of which 13 were produced by Netflix, one by Claro Tv and one by HBO GO. Regarding co-productions between Colombia and other countries, no premiere results were found, while the premiere of a series co-produced between the USA and Mexico was found.

Consequently, the series premiered and most viewed in Colombia allow us to find that *reality shows* are a new form of consumption on VoD platforms. Table 7 shows 2020 releases in VoD by country of origin to assess the level of participation of the OBITEL countries.

Table 7. VoD releases in 2020: countries of origin

Country	Titles	%
NATIONAL TOTAL	7	30,43%
OBITEL COUNTRIES TOTAL	16	69,56
Argentina	0	0
Brazil	0	0
Chile	1	4,34%
Colombia	7	30,43%
Ecuador	0	
Spain	5	21,73%
USA	9	39,13%
Mexico	1	4,34%
Peru	0	0
Portugal	0	0
Uruguay	0	0
Venezuela	0	0
TOTAL CO-PRODUCTIONS	1	4,34%
Colombian co-productions	0	
Co-productions between OBITEL countries	1	4,34%
GRAND TOTAL	23	100

Source: OBITEL Colombia

Table 7 shows that the country's participation has a significant percentage in the production of content for VoD platforms, which allows us to recognize the expansion of these platforms in Ibero-Amer-

ica. It was also possible to identify that by 2020 only Mexico and the US worked on a co-production for the region.

4. Fiction and audience participation in digital environments

In the midst of the pandemic, Decree 516 of April 4, 2020 was promulgated in Colombia by the Ministry of Information Technologies and Communications MINTIC, through which, measures are adopted for the provision of open television service broadcast, within the framework of the State of Economic, Social and Ecological Emergency of COVID 19, thereby reducing the national programming in television hours, through half the minimum number of hours that the channels must broadcast on their programming grill. With the above, private national television channels, which monopolize most of the audiences, stop producing current content and propose and carry out the repetition of fiction programs produced two decades ago such as the telenovela *Pedro el Escamoso* of the year 2001. Similarly, given the lack of current fiction production, emerging creations have been made that are independent of the content production companies, which are reproduced or transmitted by open access platforms such as *YouTube*, an example of this, is the Colombian web series “*Aisla2 en cuarentena*.” These two examples are precisely those that will be considered to contemplate the analysis about the ways in which it was possible, on the side of the *rerun*, to generate conditions for an interaction with the audience amid a kind of normality of the digitization of the daily life and, on the other hand, the appearance of new bets within the context of the pandemic.

4.1. Proposals for digital expansión

Pedro el Escamoso, a telenovela broadcast by Caracol Televisión, contains 327 episodes with an approximate duration of two years, from April 19, 2001 to its last broadcast on February 21, 2003; the present retransmission started out on October 2020 via open signal

television, which expands to the digital scene from a transmedia narrative such as interviews with the actors on web portals, where they allow the audience to visualize a comparative period of their old representations with their current daily life and activities; complete episodes in sequence or intermittence on social networks such as YouTube or Facebook; telenovela digital marketing; representations of the character in instant messaging as animated gifs or stickers; live videos on social networks or the spatialization of the soundtrack of the telenovela, *El Pirulino*, to platforms such as Spotify or YouTube.

In that order of ideas, the telenovela extends to social networks where the search for episodes can easily be found, without the need to follow a sequential narrative, which allows the audience to locate the desired episodes or to advance in the plot. In this scenario, the fiction is in several of the OTT (Over-The-Top) services that comprise content, services, or applications for users, including Spotify, in instant messaging such as WhatsApp and in social networks such as Tik Tok, Instagram, Twitter, YouTube and Facebook.

Thus, these digital extensions reflect or symbolize the main character of the fiction, Pedro Coral Tavera, played by the Colombian actor Miguel Varoni, who is a man of approximately 32 years old with the characteristics of a young village man who arrives in the capital from a small town in search of job opportunities, there he winds up working as a driver in an import company called Freydell and falls in love with his boss; thus, the fiction production incorporates particular elements of small towns that are transformed into a possible identity space of the nation, where the narrative of the fiction involves traditionalities or popular dailyities that represent situations, celebrations or characteristic profiles of the customs of a community in particular, such as popular beauty pageants, Colombia's national soccer team t-shirt, support for the football team's fans, dialects and the construction of particular phrases of the character or of a colloquial nature, which have become viral such as *masimo*, *mompirris*, *escamoso*, *fantoche*, *sagrado rostro*, *al peluche*, among others.

4.2. Social interactivity

From the point of view of the audiences, in the WhatsApp instant messaging service different users create static or animated images, about the fiction and its character, which are a communicative reference and carry an implicit message or with keywords of the character (masimo, sagrado rostro, mompirris, etc.) thus, the character is shown as a communicative icon in the gifs that complement the message to be emitted. Likewise, audiences are creators of funny images such as memes related to the character Pedro Coral that have gone viral not only on WhatsApp, but on social networks such as Facebook and Instagram. This way, the audiences of digital extension are prosumers, that is, they are consumers and creators of the content of the fiction made two decades ago, thus presenting an interactivity between the users who reference the telenovela.

Additionally, through social networks such as Tik Tok, a variety of videos are observed in relation to the plot, where users interact with fiction from different settings, among these, they upload videos of specific comic or picturesque scenes of the telenovela that impact or relate to the daily life of society. Likewise, users recreate the fictional characters in dolls with the physical characteristics of the actors, or personify the main character, using identical clothes or wigs to dance as Pedro el escamoso does with the renowned song “El pirulino”, and there is also the creation of current videos where the actor, Miguel Varoni, dances like the character he imitated two decades ago. In relation to social networks such as Facebook, Instagram or Twitter, there are groups or profiles of the users of the telenovela, many of these created by the Caracol Channel, where episodes, anticipated previews, opinions and memes are shared. Along with this, the followers of the actors who played the fictional characters were strengthened in their social media.

4.3. Emerging fiction productions

In Colombia, during mandatory confinement, media and the provision of open signal service constrained the null production of current fiction, for which Colombian actors and actresses executed a project independent of the media or private companies, through open access platforms such as the social network YouTube, an example of this is the *Aisla2 en cuarentena* web series.

Said story reflects moments of the new habits that society built from mandatory confinement, such as virtual encounters or appointments, work on digital platforms and sensations or emotions such as the loneliness, depression, joy, and anxiety that many people experienced due to the quarantine. Evidencing with this, elements, and tools of digital media to survive and respond to the needs of social encounters that were carried out physically or in person.

In relation to the interactions of the different users of the web series, from the YouTube channel *Aisla2 en cuarentena*, positive comments are observed towards the series, however, as the episodes came out, its audience decreased, so much so that the first chapter has 11,683 views and 436 likes, compared to the tenth and last chapter which contains 3,416 views and 163 likes, this shows the little advertising or digital marketing that was carried out on the web series, since it is not produced by private media which monopolizes the majority of audiences.

5. The highlight of the year

The social dynamics before and after the pandemic have changed in response to the current situation the world is going through, the appearance of a threat to health (COVID-19), which has consequently generated alterations in habits and behaviors of individuals. The new social habits that began as protection mechanisms, today are part of everyday life; referring to confinements, isolations, and quar-

antines, are no longer novel terms, on the contrary, since the arrival of the virus they are part of our normality or, as it is currently known, “the new normal”.

Before the pandemic, there was an offer of great variety of productions with different themes, among those, fictions that depicted current social problems in Colombia, such as: *la Venganza de Analía*, *Pa` Quererte* and *Enfermeras*, the first production was intended to show cases of corruption linked to a social sphere such as politics; the second production, taught a reality that is not alien to any social stratum or circle, such as the difficulty in the construction of the family unit, from the point of view of the affective bond between parents and children and the obligations emanating from this bond; and in the third production, other situations that also afflict Colombians were highlighted, such as barriers to access to health care and job instability for healthcare workers.

As for the productions *El General Naranjo* and *Betty la Fea*, these probably failed to consolidate in the rating since their content was denser and of little reception for the new public, since their themes are framed in more unique contexts aimed at a specific audience.

With regards to productions such as *Pedro el Escamoso* and *Pasión de Gavilanes*, due to social restrictions and new events, productions that address peaceful content turn out to be spaces for inclusive family entertainment, aimed at a wide audience, of easy understanding, which has rescued audiences that would have been difficult to captivate in other times. All this because they are developed with humorous and pleasant plots and language which narrate situations that are far from reality, that captivate the viewer because they are unlikely dramas. On the other hand, it is no less important to note that there are other factors that have affected current programming since the pandemic started and it is the forced pause that new productions had between *reality* shows, dramatized shows, and telenovelas, for example, for the RCN and Car-

acol channels, that due to the pandemic they were forced to stop their productions.

6. Topic of the year: Fiction in times of pandemic

In extraordinary times such as those currently being experienced because of the pandemic caused by COVID 19, not only are unexpected and difficult to assimilate situations arising throughout the world, but many of the processes that define social events seem to take on a different meaning or a much more complicated one than before. The world has changed, it is changing for better or for worse, and the only option that remains is to face with realism this dramatic challenge that continues to stretch over time and is clothed in multiple facets that continue to surprise us. It goes without saying that in this context of deep instability and uncertainty in all aspects of social life, as well as the mass media, television and all the component of fiction that circulates through this device, face in part a crisis and in part decisions both economic as in production to face the day to day and maintain or strengthen their contact with audiences.

Immersed for more than a year in this drastic alteration of the “normal” functioning of society due to the impact of the pandemic, very soon began to become evident a kind of contradiction between continuing economic activity on a regular basis to ensure the proper functioning and supply of the goods and services necessary for this purpose, and, on the other hand, the call to protect the health and life of people, to educate them in a set of habits and values around prevention and individual and collective care. This paradox, which initially seemed somewhat temporary and susceptible to negotiated solutions between the two factors, very soon became countries like ours, characterized by economic weakness and a historical fragility of the State and social policy, and also by the abundance of informality, poverty and the exclusion of broad layers of the population, became the day-to-day drama and the theme reiterated to the extreme by the permanent dis-

course of the mass media, especially by television and by the presence and capacity of increasing influence of social networks.

As can be illustrated by the balance sheets and statements of the audiovisual industry sector, the negative impact of the pandemic meant practically a generalized halt in this productive sector, which is key to the functioning of society. The regime of isolation, quarantines and other restrictive measures for mobility and the meeting of groups, resulted in an atmosphere of passivity and enormous difficulty in producing and changing content, formats and programming at the usual pace, in addition to the financial crisis involved in this short circuit of productivity.

Apart from the personal dramas of individuals linked to the medium, as well as small and large producers in the face of the aforementioned crisis, it is also true that this industry found a very particular way to sustain itself and continue in its daily work: in some way the tragic news of every day in terms of disease, numbers, deaths, infections and recoveries, forecasts bordering on pessimism and measured optimism, became a business opportunity and also entertainment to implement a continuous and uninterrupted discourse about the heroism of surviving in the face of a pandemic as devastating as it is often portrayed in the media discourse.

The first axis of this television programming in times of pandemic has been anchored in the abundance of news from dawn to dusk, with which television, as a result of the permanence of millions of people in their homes, has returned to be that kind of company of daily life, that window through which the citizen, quite isolated in the confinement, is informed of the world and national reality, which due to the technological and media convergence of current information systems becomes the informal discourse that must be attended to in order to feel “informed”, that is, “to feel as a participant in the problems facing humanity”.

It goes without saying that the tone of this continuous news program is admonitory, repetitive and focused on all the adverse effects of the disease and citizen behavior as the determining factor in the evolution of the virus, against which the State and its institutions are shown as the guarantors of order, health and care of the population. The causes that originate many of the “bad behaviors” of sectors of the population, in reference to the poorest sectors and excluded from the social pyramid, due to the labor informality they suffer, cannot stay in their “homes”, these causes go unnoticed in the discourse and they do not appear as the problem they represent and that should act as a unifier not only of consensus but of real solutions on the part of the government in power.

In functional contrast to that daily tension of assuming the weight of the facts, the drama and the tragedy in which the country and its regions are added, and in which the people are just an intimidated, distressed, incapable and isolated spectator, in the face of the widespread fear of the eventual contagion and a tomorrow plagued by uncertainty, in the midst of the stress of this continuous isolation that already seems endless and that is usually represented as another frightening pandemic, television programming, stagnant due to the productive crisis of the sector, has made use of a resource that was clearly of incalculable symbolic and cultural value: the abundance of *reruns* in the *prime time* slots, which become the appropriate resource to make a catharsis in the audiences, to offer the soft and stimulating message, the space for relaxation and healthy family fun, and also the obsequious contents with which the consumer of this cultural industry can live evoking better times and feeding the hope that very soon things will change, return to normal and everything will start again.

Despite the difficult situation that has been indicated in relation to the audiovisual industry in the country as a result of the pandemic, it is also true, and it is also very important, that despite the pandemic itself, the audiovisual market in Colombia is being re-

configured due to the expansion and arrival of the large transnational platforms that dominate the sector, which has implied both alliances with national channels and programmers as well as bids to obtain the longest and best times in the television medium, which was recorded in the debate and conflict that occurred recently as a result of the famous “screen quota”.

In Colombia it is clear that we have long witnessed stiff competition between private channels for the dominance and control of the television medium, to which the call to more foreign competitors, platforms and streaming systems is added, which by intensifying the fight for audiences and greater economic and technological resources end up fortifying the market and keeping the industry and the medium current at the expense of greater consumption and, therefore, a greater incidence in terms of representativeness and acceptance of their messages and contents by the public. To illustrate this situation, it is worth mentioning the alliance between Netflix and Caracol, which allowed the former to dominate the supply of fiction content both on television and on demand (e.g. *Pasión de Gavilanes*) in this country, so that the latter flooded said platform with its own productions focused on series and narconovelas and on melodramatic productions assimilated to different emotional, affective, regional and national idiosyncratic aspects in which broad audiences meet, identify and enjoy said representations (e.g. *Escobar el Patrón del mal*, *La ley secreta*, *La reina del Flow*, among others).

In this new television media scenario, we continue to witness a reconfiguration of the agents that participate throughout the process of creation, production, distribution, and circulation of content that floods and dominates the national audiovisual market. These are alliances and other mechanisms that facilitate joint production, as indicated above, as well as the emergence of productive forms through which both the large platforms and the national channels and programmers seek to accommodate themselves in the current grids and formats of

audiovisual offer to maintain and expand its share of presence, influence, and economic and symbolic profitability. Such is the case of the successful formula exploited by Netflix with Dynamo (national producer) in the making of *El robo del siglo*, which offered an alternative to the production of content with the large Colombian private channels, as well as in force agreements between national programmers and international paid channels such as FOX and HBO. This confirms the presence of a diverse panorama in the production of television fiction for the growing multiscreen systems in the nation and helps to account for the strong tensions that ensued with the legislative debate around the screen share quota of an entirely national production in *prime time*.

To refer in this section to the place and meaning of public television in the Colombian audiovisual environment we must register a situation that is not new, that sinks its roots in time, and on which depends the characterization that can be made of our public television.

In the first place, it is necessary to underline the fact that public television in this and other Latin American countries has been suffering decade after decade a kind of siege, isolation, and budget and political cuts, which has affected its performance and capacity to have a greater presence and influence in different audiences. This is no stranger to the desire to privatize that has dominated communication policy in the country in recent times to promote the presence of large private broadcasters and the arrival of pay-TV of transnational origin, as well as large platforms providing content in the audiovisual sector. A public television dwindling budget and often relegated to services of dissemination of content of educational, raizal, cultural type, which despite its importance for the different communities are subject to the structural limitations of this national public television.

Notwithstanding the foregoing, it must be recognized that there is an important community of filmmakers, users and facilitators in the country, around public television, so that this medium can remain active and current and can continue to be an enriching source of

the social and cultural diversity of the nation and of the interests, principles and values around which an integrative social identity is sought, a recognition and a social and political visibility of the local, regional and the different, an integration of the communities to their past and their present reconfigured with the audiovisual resource. In this sense, it is worth highlighting the construction of the RTVC Play platform, a *streaming* system that groups different types of productions, going through fiction and the incursion into formats such as the *web series* (e.g. *La de Troya*), the *transmedia narrative* (e.g. *Paciente*) and productions in which narrative experimentation processes are carried out, without neglecting the management of *reruns* of high significance for the cultural heritage of the nation and its various communities (e.g. *Crónicas de una generación trágica*, *Los pecados de Inés de Hinojosa*, *Dejémonos de vainas*, etc).

In accordance with what has been stated in this section, it seems relevant to us to point out that in the face of the systematic cut of resources and support by successive governments to the national public radio and television system of Colombia, it is ignominious to see how the current government in its eagerness to “inform” equitably invests a multimillion dollar sum in the creation of an official newsletter that can only be beneficial to said government and the interests of the groups it represents, and instead to the detriment of offering to the population that cannot access other forms of use of the medium an information manipulated in accordance with the institutionalized discourse.

5

**SPAIN: INNOVATION AND DIVERSIFICATION
IN TIMES OF PANDEMIC**

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Introduction

The State of Emergency and the Stay-at-Home order in Spain due to the pandemic, have determined the spectacular increase in television consumption in 2020, which has also resulted in a notable increase of VOD subscribers. Despite the shutdown of production processes during the first wave and the subsequent rise in costs due to the effect of the anti-COVID-19 measures, Spanish fiction confirms its dynamism in the high number of titles offered throughout the year. The tendency of the two large private channels to program their premieres on VOD is undoubtedly one of the outstanding aspects.

1. The audiovisual context of Spain in 2020

The annual weighted audience index of the three largest generalist channels reaches a new all-time low (35.8%, -0.1). Pay TV, on the other hand, achieves a new record (8.4%, +0.4), surpassing the regional networks (8.2%), which maintain their 2019 results. The exceptional situation increases consumption television, while advertising investment experienced a high decline.

1.1. Open television in Spain

The main public and private television networks suffer as a result of the increase in pay TV offers. Despite some significant increases, such as that of Nova (+0.3), Trece (+0.2), or BeMadTV (+0.2), the accumulated index of the specialty channels (DTT) also weakens (28.7%, -0.4) as a consequence of the results of FDF, Neox and the children's networks (Clan, Boing, and Disney Channel), which reached their lowest in the last 10 years.

Chart 1. Open TV networks in Spain

Reach	Public		Private	
	First channel	Second channel	First channel	Second Channel
State (national coverage) ¹	La1	La2 24H Clan Teledепorte	Antena3, Cuatro, LaSexta, Tele5	Atreseries, BEMADtv, Boing, Disney Channel, Divinity, DKISS, DMax, El Toro TV, Energy, FDF, Gol, Mega, Neox, Nova, Paramount Network, Real Madrid HD, Ten, Trece
	Á punt, Aragón TV, CanalSur, CMM, ETB1, ETB2, C, Extremadura, IB3, Telemadrid, TPA, TV3, TVCAN, TVG	3/24, And-TV, CSur-And, Espor3, ETB3, ETB4, Galicia TV, LaOtra, Super3/33, TPA2, TV3CAT, TVG2	8Madrid, 8TV, BOM Cine, HitTV, La7, La8 Mediterráneo, Fibracat TV	

Source: *Obitel España*

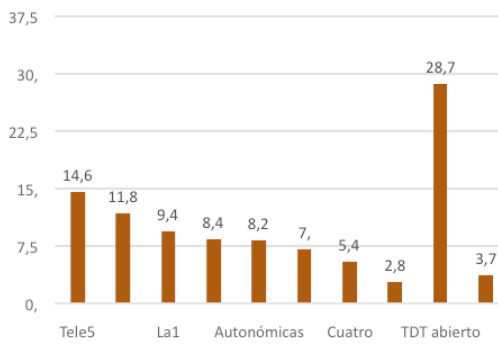
¹ In the Spanish case, “state coverage” or “national coverage” refer to networks that reach the whole country, while “automatic coverage” refers to networks with regional coverage of their own Automatic Communities. Both

After the declaration of the State of Emergency on March 14, practically all of Spanish society was forced to stay at home to stop the spread of the coronavirus. The confinement of the population had an immediate impact on television consumption (live and recorded), which reversed its negative trend of the last two years and added 18 minutes in relation to 2019, with 240 minutes per person per day in 2020 (a figure identical to 2017). However, it should be noted that this year there have been two important changes in the measurement of audiences, with the introduction of second homes in January and the expansion of the number of people meters (5,720 households in October).

For the ninth consecutive year, Tele5 has been the most watched network (14.6%, -0.2), followed by Antena3 (11.8%, +0.1) and La1, which repeats its annual historical low with the same index as last year's (9.4%). LaSexta also offers a result identical to that of 2019 (7%), while Cuatro stands at 5.4% (+0.1).

Graph 1. Share by state networks

Channel	Share (%)
Tele5	14.6
A3	11.8
La1	9.4
TDT pago	8.4
Autonómicas	8.2
LaSexta	7
Cuatro	5.4
La 2	2.8
TDT abierto	28.7
Otras	3.7
TOTAL	100

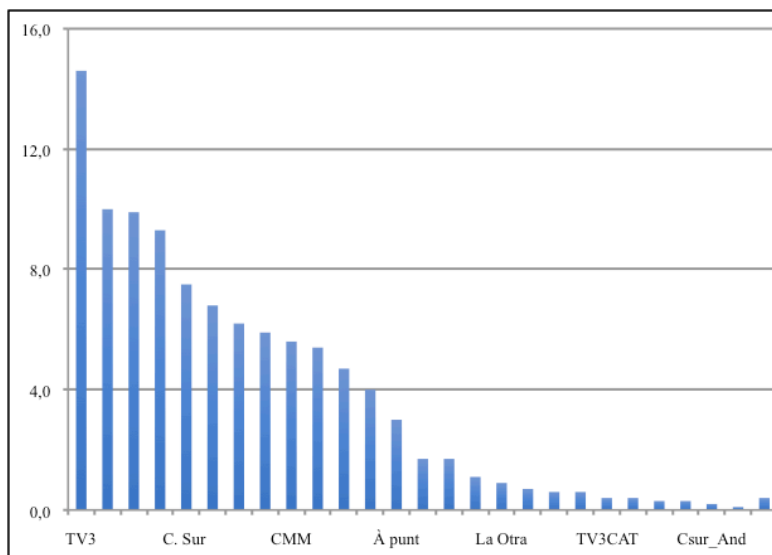


Source: Barlovento Comunicación/KantarMedia.

The public autonomic channels (8.2%), as well as the private ones (0.4%), keep the same records from 2019; that is, the best result since 2014 for the former and the annual minimum of the decade for the latter. TV3 (14.6%) is, once again, the network with the highest audience share of the whole and confirms its leadership in Catalonia for the eleventh consecutive year. It is followed by ETB2 (10%, +1.7), thus displacing TVG (9.9%, +0.6) to third place.

Graph 1a. Share by autonomic networks

Channel	%	Channel	%
TV3	14.6	Telemadrid	5.4
ETB2	10	IB3	4.7
TVG	9.9	LA 7TV	4
AragónTV	9.3	À punt	3
C. Sur	7.5	ETB1	1.7
TPA	6.8	3//24	1.7
C. Extremadura	6.2	TPA2	1.1
TV CAN	5.9	La Otra	0.9
CMM	5.6	TVG2	0.7
Super3/33	0.6	ETB3	0.3
ETB4	0.6	Csur_And	0.2
TV3CAT	0.4	Galicia TV	0.1
And. TV	0.4	Privadas	0.4
Esport3	0.3	————	————
TOTAL			100



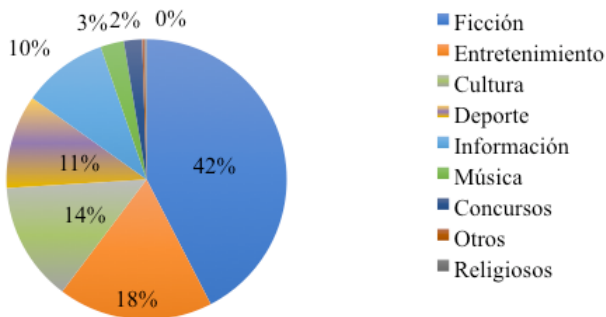
Source: Barlovento Comunicación/KantarMedia.

Leadership by business groups corresponds, once again, to Mediaset (28.4%, -0.5), followed by Atresmedia (26.3%, +0.1). Thus, the audience share of both leaders represents more than half of the total (54.8%), although they once again lose four tenths compared to 2019. RTVE gets 15.4% (-0.1 points); while FORTA (8.1%) repeats the result. Both Vocento (2.6%) and Unidad Editorial (2.5%) lost three tenths.

Fiction is down compared to 2019, but it is still the genre with the highest presence in the networks (42.3%, -0.4), followed by entertainment (17.8%, +0.6), culture (13.7%, +0.3), sports (10.8%, -0.8) and information (9.8%, +0.7). Despite its leadership among genres, no fiction show is in the top 50 most viewed broadcasts of the year.

Graph 2. Offer by genre in TV programming

Genre	%
Fiction	42.3
Entertainment	17.8
Culture	13.7
Sports	10.8
Information	9.8
Music	2.7
Contests	2.1
Others	0.3
Religious	0.2
TOTAL	100



Source: Barlovento Comunicación/KantarMedia.

In economic terms, 2020 has not been a good year for the three main audiovisual groups. RTVE closed the year with losses of

around 50 million euros, that is, almost double those of 2019 (29.67 million euros), although slightly lower than the estimates for July (60 million)². In 2020, Mediaset obtained 178.7 million benefits, 15.6% less than in 2019³; and Atresmedia earned 23.8 million, which implies a decrease of 79.8% compared to the previous year⁴. The budget that suffered the most in both groups was advertising (see section 1.4).

1.2. Pay TV and VOD in Spain

DTT (74%) maintains its 2019 record and continues to be the main television content distribution system in Spain. However, it once again leads with its all-time low as a result of the increase in pay television subscriptions (IPTV cable or satellite), which, on the contrary, marks a new record (26.4%, +0.7) thanks to the increase in the IPTV system (16% + 1.5).

In September 2020, 7,967,202 households were subscribed to some form of pay television⁵, 15.5% more than last year. In the first nine months of the year, pay television revenues amounted to 1,582.65 million euros (-5.4%), while those of open-access television represented 938.36 million (-22%).⁶

Specialty pay channels average 8.4% audience (see Graph 1), four tenths more than in 2019, which marks a new historical record. Among the ten most viewed pay networks are Fox Spain, responsible for the continuation of *Vis a Vis* (*Vis a Vis. El Oasis*); TNT, which premiered *Vamos Juan* in 2020, and # 0, which broadcasts the vast range of original fiction from Movistar +.

2 https://vertele.eldiario.es/noticias/RTVE-presupuesto-2021-1127-millones-subida-Rosa-Maria-Mateo_0_2283971628.html

3 https://files.mediaset.es/file/10002/2021/02/24/FY_20_SPANISH_CNMV_f7a7.pdf

4 https://www.atresmediacorporacion.com/documents/2021/02/25/ACCF96A3-2088-4208-8394-DD4B4DCEB6D7/atresmediare resultados_2020cnmv.pdf

5 http://data.cnmc.es/datagraph/jsp/inf_trim.jsp

6 http://data.cnmc.es/datagraph/jsp/inf_trim.jsp

Chart 2. Pay TV Channel in Spain

Top 10 Most Watched Pay TV Networks in 2020
1) Movistar Laliga (soccer), 2) Fox (fiction), 3) AXN (fiction), 4) TNT (fiction), 5) Calle 13 (fiction), 6) Canal Hollywood (movies), 7) Comedy Central (comedy), 8) Fox Life (entertainment), 9) #0 (entertainment), 10) Historia (documentaries)
TOTAL: 10 news channels

Source: Barlovento Comunicación/KantarMedia

Chart 3. VOD in Spain

Main active VOD platforms in 2020	Total
Netflix, Amazon Prime Video, HBO, Disney+, Apple TV, Movistar+ y Movistar+ Lite (Telefónica), Vodafone TV (Vodafone), Orange TV (Orange), Starzplay, Rakuten TV, Pluto TV, fuboTV, Sky, Filmin, Cineclick, FlixOlé, DAZN, Acorn TV, LovesTV, RTVEalacarta.es (TVE), Atresplayer Premium (Atresmedia), Mitele Plus (Mediaset), Mubi, IQiyi, Crunchyroll, Quibi, Planet Horror	28
TOTAL	28

Source: Obitel España

1.3. Independent producers of TV fiction

For a couple of years, the profound changes in the Spanish audiovisual scene have been turning competitors into business partners. Among other 2020 alliances, Atresmedia and Telefónica joined forces in June to create Buendía Estudios, with the aim of producing internationally. Warner Bros. and Alea Media, Aitor Gabilondo's production company, also signed an agreement to develop two television series, while the strategic alliances between Mediapro and Orange on the one hand, and Mediapro with Hulu Japan and HBO Asia on the other, bore their first fruits with the series *Caminantes*, in the first case, and *The Head* in the latter.

1.4. Sources of financing for the audiovisual sector

Investment in advertising has continued its negative trend and, for the second year in a row, television has ceased to be the leader among the media, a position now occupied by the Digital category. Advertising investment in television decreased by 18.4% compared to the previous year, with a total of 1,640.3 million euros. Advertising investment of national open over-the-air networks fell by 19.2% (1,459.2 million euros), placing its market share at 89% (-0.9); while among autonomous televisions the decrease represented 12.6% (79.3 million euros), with a share of 4.8% (+0.3). Payment channels showed a decrease of 8.9% (99.7 million), with a market share of 6.1% (+0.7)⁷. In April, the government approved 15 million in aid for private television channels in order to alleviate the drastic drop in advertising investment.

7 http://data.cnmc.es/datagraph/jsp/inf_trim.jsp

According to Infoadex data, Mediaset's advertising revenue registered 709 million euros, 18.4% less than the previous year; while Atresmedia registered 656.1 million, a decrease of 19.5% compared to 2019. With these results, Mediaset obtained a market share of 43.2% and Atresmedia, 40%, which means that the two leaders of broadcast television in Spain maintained their hegemony in advertising revenues: 83.2% of total investment in television.⁸

1.5. Communication Policies

In November 2020, the Executive Government presented the draft of the new General Audiovisual Communication Law, better known as the “Netflix rate”, which forces “providers of television audiovisual communication service on demand”, that is, new platforms of video and the rest of new operators, to allocate 5% of the income generated in Spain to finance European audiovisual work or to contribute to the ICAA Film Protection Fund. However, and contrary to expectations, this new legislation does not cover the financing of RTVE, to which private television channels and telecommunications operators contribute instead. It is, therefore, a comparative offense for the rest of the operators, which the Union of Open-Access Commercial Televisions (UTECA) has already denounced.

1.6. Digital and mobile connectivity infrastructure

In June, Spain informed the European Union that, as a result of the exceptional situation generated by COVID-19, it was impossible to complete the Second Digital Dividend before the 30th of the same

8 <https://www.infoadex.es/home/wp-content/uploads/2021/02/NP-Estudio-InfoAdex-de-la-Inversi3n-Publicitaria-en-Espa1a-2021.pdf>

month; that is, the process by which the frequencies of the 700 MHz band, now occupied by DTT channels, are released to be used for the deployment of 5G networks. Thus, October 31 was set as the new date for completion. In order to pay for the necessary changes in the transmitting equipment, the Council of Ministers approved in July subsidies for a maximum amount of 10 million euros to private televisions. That same month, RTVE launched the restored 4K versions of *Don Quijote* and *La Regenta*, the first two works of the corporation's Documentary Fund that have been remastered in ultra-high definition.

2. Analysis of the year

The number of premieres of domestic fiction in 2020 amounts to 75 titles (13 state, 18 regional, and 43 VOD), one more than last year. This is truly remarkable in times of pandemic, mainly due to the extraordinary contribution of payment platforms, which confirms the dynamism of Spanish fiction. VOD's momentum has introduced radical changes in the programming strategies of the two largest private state networks, which have chosen to premiere some of their fictions in streaming.

Antena3 open-access offer only includes two serials: *El Secreto del Puente Viejo* and *Amar Es para Siempre*, while the rest of its fictions were transferred to Atresplayer, a trend that started last year with a thriller currently available on Netflix (*El Nudo*). Tele5 has released two open-access comedies, which have successively been incorporated into the Amazon Prime Video catalog, and six series on VOD (four on the latter platform, one on HBO, and one on Netflix). La1 is the only one of the three large state networks that continues to premiere all its fiction in open-access over-the-air, and also offers its fiction on its own free online platform.

Table 1. Fiction broadcasted in 2020 (national and imported, premieres, reruns and co-productions). State networks

<p>PREMIERE STATE TITLES – 13</p> <p>La1 - 9</p> <ol style="list-style-type: none"> 1. <i>Cuéntame Cómo Pasó</i> (series) 2. <i>HIT</i> (series) 3. <i>Diarios de la Cuarentena</i> (series) 4. <i>El Ministerio del Tiempo</i> (series) 5. <i>Néboa</i> (series) 6. <i>Servir y Proteger</i> (serial) 7. <i>Historias de Alcafrán</i> (series) 8. <i>Mercado Central</i> (serial) 9. <i>Acacias 38</i> (serial) <p>Antena3 – 2</p> <ol style="list-style-type: none"> 10. <i>El Secreto del Puente Viejo</i> (serial) 11. <i>Amar Es para Siempre</i> (serial) <p>Tele5 – 2</p> <ol style="list-style-type: none"> 12. <i>Lejos de Ti</i> (series) 13. <i>El Pueblo</i> (series) <p>RERUN TITLES - 13</p> <p>La1 – 5</p> <ol style="list-style-type: none"> 1. <i>Olmos y Robles</i> (series) 2. <i>El Final del Camino</i> (series) 3. <i>Fugitiva</i> (series) 4. <i>El Caso. Crónica de Sucesos</i> (series) 5. <i>Hospital Valle Norte</i> (series) <p>Tele5 – 3</p> <ol style="list-style-type: none"> 6. <i>La que Se Avecina</i> (series) 7. <i>Escenas de Matrimonio</i> (sketches) 8. <i>Lo que Escondían Tus Ojos</i> (miniseries) <p>Cuatro – 1</p> <ol style="list-style-type: none"> 9. <i>Gym Toni</i> (series) <p>Divinity - 4</p> <ol style="list-style-type: none"> 10. <i>Hospital Central</i> (series) 11. <i>MIR</i> (series) 12. <i>Al Salir de Clase</i> (series) 13. <i>Yo Soy Bea</i> (serial) <p>TOTAL PREMIERE TITLES: 13</p>
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Source: *Obitel España*.

The wide range of VOD platforms also had an impact on the decrease in reruns, a constant since the consolidation of DTT in 2011. The strategies of the two large private channels, however, are divergent. Thus, while Antena3 is reluctant to broadcast the premieres of Atresplayer openly, Tele5 added *Madres*, *Patria*, *Perdida* and *Veneno* to its own programming, after their debut on Amazon Prime Video.

The 18 titles of the autonomic networks represent only one less than last year, a figure consistent with the stability in terms of the audience of this group of channels, which have also successfully recovered from the first year of the pandemic. The contribution of the Catalan channel TV3 and the Galician TVG stand out for another year compared to the whole, with five titles each. Aragón TV makes its debut in fiction production with a drama, while ETB1 contributes three miniseries and the end of the fourth and fifth seasons of its successful youth series *Go!azen*, on air since 2009.

Table 1a. Fiction broadcasted in 2020 (national and imported; premieres, reruns and co-productions). Autonomic networks

PREMIERE AUTONOMIC TITLES - 18

TV3 - 4

1. *Com Si Fos Ahir* (serial)
2. *Jo També Em Quedo a Casa* (series)
3. *La Fossa* (miniseries)
4. *Les de L'Hoquei* (series)
5. *Drama* (series)

TVG - 3

6. *A Estiba* (series)
7. *Do Dereito E do Revés* (series)
8. *Os Mariachi* (series)
9. *A Lei de Santos* (series)
10. *Serramoura* (series)

ETB1 - 4

11. *Alardea* (miniseries)
12. *Go!azen* (miniseries)
13. *Hondar Ahoak* (miniseries)
14. *Altsasu* (miniseries)

IB3 – 2

15. *Mai Neva A Ciutat* (series)
16. *Pep* (series)

Aragón TV

17. *El Último Show* (series)

CO-PRODUCTIONS – 1

TVG – 1

18. *Auga Seca* (series) (España y Portugal)

RERUNS –16

Aragón TV

1. *Matalobos* (series)
2. *La Sala* (series)
3. *Merlín* (series)

À Punt

4. *Açò Es Un Destarifo* (series)
5. *Unió Musical Da Capo* (series)
6. *Maniàtics* (series)
7. *Socarrats* (series)
8. *Les de L'Hoquei* (series)
9. *Nit i Dia* (series)
10. *La Sala* (series)

CMT

11. *El Faro* (serial)
12. *La Sala* (series)
13. *La Esclava Blanca* (series)

RTVC

14. *El Último Show* (series)

Telemadrid

15. *La Sala* (series)

TOTAL PREMIERE TITLES: 17

TOTAL OBITEL CO-PRODUCTIONS: 1

Source: Obitel España.

The decrease in the number of national fiction premieres on open access over-the-air networks is partially offset by the increase in the number of Ibero-American titles (eight compared to three in 2019). The length of Latin American telenovelas reduces, in turn, the

difference in hours compared to the previous year (1,380 hours and 35 minutes in 2020 and 1,424 hours in 2019), while determining the slight increase in the number of chapters/episodes (1,564 in 2020 and 1,424 in 2019).

Table 2. State premiere fiction in 2020: Spain

Country	Titles	%	Chap./Ep.	%	Hours	%
NATIONAL (total)	13	61.9	1145	73.2	1030:10:00	74.6
OBITEL COUNTRIES (total)	8	38.1	419	26.8	350:25:00	25.4
Argentina	0	0.0	0	0.0	0:00:00	0.0
Brazil	1	4.8	31	2.0	23:15:00	1.7
Chile	0	0.0	0	0.0	0:00:00	0.0
Colombia	1	4.8	42	2.7	31:30:00	2.3
Ecuador	0	0.0	0	0.0	0:00:00	0.0
Spain	13	61.9	1145	73.2	1030:10:00	74.6
USA (Hispanic productions)	1	4.8	105	6.7	78:45:00	5.7
Mexico	4	19.0	230	14.7	205:55:00	14.9
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
CO-PRODUCTIONS (total)	1	100.0	11	100.0	11:00:00	100.0
Spanish co-productions	0	0.0	0	0.0	0:00:00	0.0
Obitel co-productions	1	100.0	11	100.0	11:00:00	100.0
TOTAL GENERAL	21	100.0	1564	100.0	1380:35:00	100.0

Source: Obitel España.

The difference between the number of hours of the Spanish total (national and regional) compared to 2019 is even smaller (1,567 hours and 35 minutes in 2020 compared to 1,681 hours and 10 minutes in 2019), despite the fact that this year there were seven less releases than in the past (39 and 46 respectively). On the other hand, the number of chapters/episodes decreases (1,817 in 2020 and 1,940 in 2019).

Table 2a. State and autonomic premiere fiction in 2020: Spain

Country	Titles	%	Chap./Ep.	%	Hours	%
NATIONAL (total)	31	79.5	1398	76.9	1217:10:00	77.6
OBITEL COUNTRIES (total)	8	20.5	419	23.1	350:25:00	22.4
Argentina	0	0.0	0	0.0	0:00:00	0.0
Brazil	1	2.6	31	1.7	23:15:00	1.5
Chile	0	0.0	0	0.0	0:00:00	0.0
Colombia	1	2.6	42	2.3	31:30:00	2.0
Ecuador	0	0.0	0	0.0	0:00:00	0.0
Spain	30	76.9	1392	76.6	1212:10:00	77.3
USA (Hispanic productions)	1	2.6	105	5.8	78:45:00	5.0
Mexico	4	10.3	230	12.7	205:55:00	13.1
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
CO-PRODUCTIONS (total)	2	100.0	18	100.0	16:00:00	100.0
Spanish co-productions	1	50.0	6	33.3	5:00:00	31.3
Obitel co-productions	1	50.0	11	61.1	11:00:00	68.8
GRAND TOTAL	39	100.0	1817	100.0	1567:35:00	100.0

Source: *Obitel España*.

The five Spanish serials aired on national networks represent 38.5% of the total formats and 969 hours of broadcast, to which can be added the 350 hours and 25 minutes of the eight premiere telenovelas (100% of the Latin American total). The significance of this data increases if one takes into account that 2020 is the year in which the telenovelas have returned to national prime time, after almost 30 years of absence, although this time it has done so hand in hand with the Turkish productions *Mujer* and *Mi hija*. Thanks to the airings of the latter, released in December, the serial became the first fictional program to be among the most viewed of the year (in ninth position in the annual ranking).⁹

Table 3. Formats of state and Ibero-American fiction

Format	National						Ibero-American					
	Titles	%	C/E	%	H	%	Titles	%	C/E	%	H	%
Serial/Telenovela	5	38.5	66	5.8	969:00:00	94.1	8	100.0	419	100.0	350:25:00	100.0
Series	8	61.5	1079	94.2	61:10:00	5.9	0	0.0	0	0.0	0	0.0
Miniseries	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0	0	0.0
TV movie	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0	0	0.0
Unitario	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0	0	0.0
Docudrama	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0	0	0.0
Others	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0	0	0.0

Source: *Obitel España*.

The diversification of formats in 2020 premieres is greater in the Spanish total with respect to national fiction, since the autonomic

9 <https://www.infoadex.es/home/wp-content/uploads/2021/02/NP-Estudio-InfoAdex-de-la-Inversión-Publicitaria-en-España-2021.pdf>

channels contribute four miniseries (three of which are from ETB1 and one from TV3), although their presence on the air only represents 1% of the total. On the other hand, the broadcasting time dedicated to homegrown series increased exponentially, with 169 hours of broadcasting (13.9% compared to 5.9% for state fiction).

Table 3a. Formats of national, regional and Ibero-American fiction

Format	National and Regional						Ibero-American					
	Titles	%	C/E	%	H	%	Titles	%	C/E	%	H	%
Serial/Telenovela	7	22.6	178	12.7	1035:50:00	85.1	8	100.0	419	100.0	350:25:00	100.0
Series	20	64.5	1204	86.1	169:00:00	13.9	0	0.0	0	0.0	0	0.0
Miniseries	4	12.9	16	1.1	12:20:00	1.0	0	0.0	0	0.0	0	0.0
TV movie	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0	0	0.0
Unitario	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0	0	0.0
Docudrama	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0	0	0.0
Others	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0	0	0.0
Total	31	100.0	1398	100.0	1217:10:00	100.0	8	100.0	419	100.0	350:25:00	100.0

Source: *Obitel España*.

The premiere of most of the Antena3 and Tele5 fictions as VOD also highlights La1's contribution to the top 10 of 2020, with six titles. At the same time, it serves as evidence of Tele5's successful strategy to premiere its comedies in open-access. *El Pueblo* (2,199,000 viewers and 16.8% share) and *Lejos de Ti* (1,716,000 viewers and 11.8% share), ranked first and third in the annual ranking respectively. *El Pueblo*, a creation by the same production company as the popular *La que Se Avecina* (Contubernio), narrates the complex coexistence between the locals and a group of urbanites recently settled in the prov-

ince of Soria. *Lejos de Ti* is a comedy with touches of fantasy and sitcom co-produced by Mediaset España and Cross Production, about the crush of a young Sevillian woman and a Roman who meet at an airport. La1's long-running series *Cuéntame Cómo Pasó* (2,189,000 viewers and 14.4% share), set between 1990 and 1991, stands the test of time and places its twentieth season in second position in the annual ranking, with 4.4 share points less than in 2019, which is also worth the 24th position among the most watched programs of the year.¹⁰

The small number of releases in open-access places three serials in the annual ranking for the first time. The only two premiere fictions offered by Antena3, *Amar Es para Siempre* (1,253,000 viewers and 10.6% share) and the final stretch of *El Secreto del Puente Viejo* (1,065,000 viewers and 1.4%), which said goodbye in May after nine years on air, occupy the sixth and ninth position respectively. *Servir y proteger* a daily cop-show closes the ranking of the annual top ten.

The importance of female characters in *Néboa*, the return of teen series to the national prime time (*HIT*), the stereotypes about contrasts of *El Pueblo*, and the reflection on the present from the past of the serials, are outstanding aspects of the premieres in open-access state fiction.

Table 4. The ten most watched state titles

	Title	Channel	Country of original idea or script	Format/ Genre	C/E	Time Slot	Viewers	Rating	Share
1	<i>El Pueblo</i>	Tele5	Spain	Series / Comedy	8	Prime time	2,199,215	2.5	16.3
2	<i>Cuéntame Cómo Pasó</i>	La1	Spain	Series / Dramedy	12	Prime time	2,189,167	4.6	14.4

10 <http://www.geca.es/geca/informes/20201230--El%20balance%20del%20a%C3%B1o%20-%202020.pdf>

	Title	Channel	Country of original idea or script	Format/ Genre	C/E	Time Slot	Viewers	Rating	Share
3	<i>Lejos de Ti</i>	Tele5	Spain-Italy	Series/Comedy	7	Prime time	1,716,143	3.6	11.8
5	<i>HIT</i>	La1	Spain	Series / Drama	10	Prime time	1,489,800	3.1	9.1
5	<i>Diarios de la Cuarentena</i>	La1	Spain	Series / Comedy	8	Prime time	1,315,000	2.8	6.9
6	<i>El Misterio del Tiempo</i>	La1	Spain	Series / Drama	8	Prime time	1,298,250	2.7	8.0
7	<i>Amar Es para Siempre</i>	Antena3	Spain	Serial / Drama	251	Afternoon	1,253,239	2.6	10.6
8	<i>Néboa</i>	La1	Spain	Series / Thriller	8	Prime time	1,234,750	2.6	8.4
9	<i>El Secreto de Puente Viejo</i>	Antena3	Spain	Serial / Drama	86	Afternoon	1,065,423	2.3	9.4
10	<i>Servir y Proteger</i>	La1	Spain	Serial / Copshow	253	Afternoon	995,569	2.1	8.9

Source: *Obitel Spain*.

For regional TV, the premieres of TV3 and TVG fill, once again, a ranking in which the first contribution of Aragón TV to regional fiction can be found: *El Último Show*. It is a drama starring the famous Aragonese comedian “Marianico el Corto” (Miguel Ángel Tirado), who mixes his life and his character in a nostalgic remembrance of the past under the direction of Álex Rodrigo, co-director and co-writer of great hits such as *Vis a vis* (Antena3 and Fox, 2015-2019), *La Casa de Papel* (Antena3 and Netflix, 2017-) and *El Embarcadero* (Movistar+, 2019-20), among others.

The second season of *Les de L'Hoquei* (357,000 viewers and 13.5% share) tops the annual ranking, after increasing its audience

dramatically compared to the first installment in a year of general declines. *Drama* shows that the interest of national networks and VOD platforms in teen series also extends to regional fiction.

Table 4a. The ten most watched autonomic titles

	Title	Channel	Country of original idea or script	Format/Genre	C/E	Time Slot	Viewers	Rating	Share
1	<i>Les de l'Hoquei</i>	TV3	Spain	Serial / Drama	13	Prime time	357,000	4.9	13.5
2	<i>Jo També Em Quedo a Casa</i>	TV3	Spain	Series / Dramedy	20	Tarde	293,000	4.0	13.9
3	<i>Drama</i>	TV3	Spain	Series / Comedia	6	Prime time	280,000	3.8	11.5
4	<i>Com Si Fos Ahir</i>	TV3	Spain	Serial / Drama	112	Tarde	258,000	0.7	16.30
5	<i>La Fossa</i>	TV3	Spain	Miniseries / Thriller	4	Prime time	205,000	2.8	9.20
6	<i>A Ley de Santos</i>	TVG	Spain	Series / Thriller	7	Prime time	89,000	3.4	10.1
7	<i>Serramoura</i>	TVG	Spain	Series / Thriller	18	Prime time	87,000	3.3	10.0
8	<i>O Sabor das Margaridas</i>	TVG	Spain	Series / Thriller	6	Prime time	74,000	2.8	8.3
9	<i>El Último Show</i>	AragónTV	Spain	Series / Drama	8	Prime time	71,000	5.6	12.9
10	<i>Auga Seca</i>	TVG-RTP	Spain-Portugal	Series / Thriller	6	Prime time	70,000	2.7	8.1

Source: Obitel Spain.

The top 10 of 2020 includes four TVG thrillers, a genre so popular in Galicia that it has led critics to speak of the “Galician noir boom” to bring together a set of productions characterized by the complexity of the characters, the atmosphere of mystery and the predominant role played by the locations in the stories, which also include *Néboa* (La1) and *El Desorden que Dejas* (Netflix). The title that heads

the classification of the Galician channel (*A lei de Santos*) is a spin-off of the successful *Serramoura*, which ended after seven years on air.

3. 2020 VOD Monitoring

The Stay-at-Home order produced a significant increase in the consumption of VOD platforms. They have continued to grow and expand their content, with an increasingly specialized offer, which shows the maturity of Spanish television fiction production. The 2020 releases include some great international hits (*Elite*, *Las Chicas del Cable*) and confirm the relevance of the thriller. 79.1% of domestic VOD fiction has premiered this year for the first time.

3.1. VOD platform market

The supply of digital platforms has continued to increase throughout 2020, as well as their demand (Chart 3). Disney+ has undoubtedly been the most anticipated launch of the year, with an offer of more than 400 films and about 7,500 television episodes at the price of 6.99 euros per month or 69.99 euros per year. In the middle of the confinement, Quibi, the short content platform only for mobile phones, also arrived at Spain. However, only six months later, it confirmed its closure. During the summer, Sky Spain also announced it was shutting down, putting an end to an adventure that began in 2017. Finally, in October, Pluto TV, from ViacomCBS, the first AVOD (advertising-based video on demand) in the Spanish market, landed. This new streaming service, free and without registration, has more than 40 exclusive special channels and combines linear and on-demand television.

The platforms already consolidated in our country have also taken advantage of 2020 to improve their positioning in the face of the competition. Orange TV joined forces with AMC Networks International to increase its content offering and launch AMC Selekt, a new

on-demand service at no additional cost. Netflix began offering, for free, some of its titles; while Amazon Prime Video launched Prime Video Channels, a new service that allows you to add streaming channels without a commitment to stay. Available subscriptions include Starzplay, MGM, and Noggin, among others, with prices ranging from €2.99 to €9.99 per month.

Regarding the demand for this type of services, different consulting firms have started to analyze the phenomenon in the absence of official data provided by the companies themselves. According to the study “OTT and payment platforms in Spain”, by Barlovento Comunicación¹¹, Netflix is the OTT with the highest penetration (33% of households), followed by Amazon Prime Video (14.3%) and HBO Spain (9.4%). The results of the sixth wave of the OTT Barometer of the Audiovisual Communication Studies Cabinet (GECA)¹² corroborate this ranking: Netflix continues to be the platform with the most users in Spain (67.3% of those surveyed), followed by Amazon Prime Video (62.1%) and HBO Spain (27.3%). On the contrary, the Digital TV Research¹³ study points out that Amazon Prime Video and Disney+, with 1.25 million subscribers each, share the second position, only below Netflix (4.2 million subscribers), but ahead of HBO (731,000). However, the only official data is the one from OTTs owned by national channels: Atresplayer Premium¹⁴ with 452,000 subscribers, and Mitele Plus with 109,000, as of December 31, 2020.¹⁵

11 <http://www.geca.es/geca/informes/20201230--El%20balance%20del%20a%C3%B1o%20-%202020.pdf>

12 <https://www.barloventocomunicacion.es/informes-barlovento/analisis-ott-tv-pago-espana/>

13 <https://www.audiovisual451.com/amazon-y-hbo-las-plataformas-que-mas-crecimiento-registran-en-espana-segun-geca/>

14 <https://www.expansion.com/economia-digital/companias/2020/10/30/5f96c807e5fdea28548b4594.html>

15 https://www.atresmediacorporacion.com/documents/2021/02/25/ACCF96A3-2088-4208-8394-DD4B4DCEB6D7/atresmediare resultados_2020cnmv.pdf

3.2. Analysis of VOD IN 2020: Premiered Spanish and Ibero-American fictions

The spectacular growth of VOD in the year of COVID translates into 90 titles released in VOD (68 in 2019), 40 Spanish, 47 Latin American, and three co-productions. *Inés del Alma Mia* is a Spanish-Chilean series based on the homonymous novel by Isabel Allende about the life of the first Spanish woman to arrive in Chile, Inés Suárez. *Dime Quién Soy* is another literary adaptation, in this case of Julia Navarro's bestseller of the same name, produced by DLO Producciones for Movistar+ and Telemundo. The third co-production, the Spanish-American thriller *The Head*, was produced by Mediapro for Hulu Japan and HBO Asia and premiered on Orange TV.

Table 5. National and Ibero-American fictions exhibited in 2020 on VOD systems

NATIONAL RELEASED PRODUCTIONS	IBERO-AMERICAN RELEASED PRODUCTIONS	CO-PRODUCTIONS
<p>Netflix – 8</p> <ol style="list-style-type: none"> 1. <i>Alguien Tiene que Morir</i> (miniseries) 2. <i>El Desorden que Dejas</i> (series) 3. <i>Élite</i> (series) 4. <i>Las Chicas del Cable</i> (series) 5. <i>Los Favoritos de Midas</i> (series) 6. <i>El Sabor de las Margaritas</i> (series) 7. <i>Valeria</i> (series) 8. <i>Vivir sin Permiso</i> (series) <p>Movistar+ – 10</p> <ol style="list-style-type: none"> 9. <i>Antidisturbios</i> (series) 10. <i>El Embarcadero</i> (series) 	<p>Netflix – 37</p> <ol style="list-style-type: none"> 1. <i>Bolívar</i> (telenovela - Mexico) 2. <i>Casi Feliz</i> (series - Argentina) 3. <i>Coisa Mais Linda</i> (series -Brazil) 4. <i>Desenfrenadas</i> (series - Mexico) 5. <i>Diablero</i> (series – Mexico) 6. <i>El Dragón</i> (telenovela – Mexico) 7. <i>Enemigo Íntimo</i> (telenovela - USA) 8. <i>Falsa Identidad</i> (telenovela - USA) 9. <i>La Casa de las Flores</i> (series - Mexico) 	<p>Amazon Prime Video – 1</p> <ol style="list-style-type: none"> 1. <i>Inés del Alma Mia</i> (series – Spain and Chile) <p>Movistar+ – 2</p> <ol style="list-style-type: none"> 2. <i>Dime Quién Soy</i> (series – Spain and USA) <p>Orange TV – 1</p> <ol style="list-style-type: none"> 3. <i>The Head</i> (series - Spain and USA)

NATIONAL RELEASED PRODUCTIONS	IBERO-AMERICAN RELEASED PRODUCTIONS	CO-PRODUCTIONS
<p>11. <i>Justo Antes de Cristo</i> (series)</p> <p>12. <i>La Línea Invisible</i> (series)</p> <p>13. <i>La Unidad</i> (series)</p> <p>14. <i>Mira Lo que Has Hecho</i> (series)</p> <p>15. <i>Nasdrovia</i> (series)</p> <p>16. <i>Skam</i> (series)</p> <p>17. <i>Vergüenza</i> (series)</p> <p>18. <i>Dime Quién Soy</i> (series)</p> <p>Atresplayer – 7*</p> <p>19. <i>Benidorm</i> (series)</p> <p>20. <i>By Ana Millán</i> (series)</p> <p>21. <i>Física o Química. El Reencuentro</i> (miniseries)</p> <p>22. <i>La Valla</i> (series)</p> <p>23. <i>#Luimelia</i> (series)</p> <p>24. <i>Mentiras</i> (series)</p> <p>25. <i>Perdida</i> (series)</p> <p>26. <i>Veneno</i> (series)</p> <p>Amazon Prime Video - 9</p> <p>27. <i>Caronte</i> (series)</p> <p>28. <i>Desaparecidos</i></p> <p>29. <i>El Cid</i> (series)</p> <p>30. <i>La que Se Avecina</i> (series)</p> <p>31. <i>Madres</i> (series)</p> <p>32. <i>Relatos Confinados</i> (series)</p> <p>33. <i>Señoras del Hampa</i> (series)</p> <p>HBO - 3</p> <p>34. <i>30 Monedas</i> (series)</p> <p>35. <i>En Casa</i> (anthology)</p> <p>36. <i>Patria</i> (series)</p> <p>Orange TV - 2</p> <p>37. <i>Camiantes</i> (series)</p> <p>38. <i>Kosta. The Paradise</i> (series)</p> <p>FOX SPAIN – 1</p> <p>39. <i>Vis a Vis. El Oasis</i> (series)</p> <p>TNE – 1</p> <p>40. <i>Vamos Juan</i> (series)</p>	<p>10. <i>La Reina del Flow</i> (telenovela - Colombia)</p> <p>11. <i>Monarca</i> (series - Mexico)</p> <p>12. <i>Narcos Mexico</i> (series – Mexico)</p> <p>13. <i>Omnisciente</i> (miniseries – Brazil)</p> <p>14. <i>Oscuro Deseo</i> (series - Mexico)</p> <p>15. <i>3%</i> (series - Brazil)</p> <p>16. <i>100 Días para Enamorarnos</i> (telenovela - USA)</p> <p>17. <i>Amar and Vivir</i> (telenovela - Colombia)</p> <p>18. <i>Boca a Boca</i> (series - Brazil)</p> <p>19. <i>Buenos Días Verónica</i> (series - Brazil)</p> <p>20. <i>Control Z</i> (series - Mexico)</p> <p>21. <i>El Reto del Beso</i> (series - Brazil)</p> <p>22. <i>El Robo del Siglo</i> (series - Colombia)</p> <p>23. <i>Espectors</i> (series -Brazil)</p> <p>24. <i>Historia de Un Crimen</i> (series - Mexico)</p> <p>25. <i>Homemade</i> (series – Chile - Italy)</p> <p>26. <i>Kissing Game</i> (series - Brazil)</p> <p>27. <i>La Venganza de Analia</i> (telenovela - Colombia)</p> <p>28. <i>No Te Puedes Esconder</i> (series - USA)</p> <p>29. <i>Puerta 7</i> (series - Argentina)</p> <p>30. <i>Reality Z</i> (series - Brazil)</p> <p>31. <i>Secreto Bien Guardado</i> (series - Argentina)</p> <p>32. <i>Selena</i> (series)</p> <p>33. <i>Siempre Bruja</i> (series - Colombia)</p> <p>34. <i>The Great Heist</i> (series - Colombia)</p> <p>35. <i>The Queen And the Conqueror</i> (telenovela - Colombia)</p> <p>36. <i>The Unremarcable Juanquini</i> (series - Colombia)</p> <p>37. <i>Chichipatos</i> (series - Colombia)</p>	

NATIONAL RELEASED PRODUCTIONS	IBERO-AMERICAN RELEASED PRODUCTIONS	CO-PRODUCTIONS
	<p>AMAZON PRIME VIDEO – 7 38. <i>Cómo Sobrevivir Soltero</i> (series - Mexico) 39. <i>De Brutos Nada</i> (series - Brazil) 40. <i>El Candidato</i> (series - Mexico) 41. <i>El Presidente</i> (series - Chile - Argentina) 42. <i>La Jauría</i> (series - Chile) 43. <i>Pan and Circo</i> (series - Mexico)</p> <p>FOX – 3 44. <i>El General Naranjo</i> (series - Colombia) 45. <i>Lámame Bruna</i> (series - Brazil) 46. <i>Aquí en la Tierra</i> (series - Mexico)</p> <p>HBO – 1 47. <i>Dignidad</i> (series - Chile)</p>	
Total: 40	Total: 47	Total: 3
GRAND TOTAL: 90		

Source: Obitel Spain

Mexico regains the primacy of Ibero-American contributions with 13 titles (10 in 2019), closely followed by Colombia (11 titles) and Brazil (10 titles). Argentina premieres two less titles than in 2019.

Table 6. VOD premiered fiction in 2020: countries of origin

Country	Titles	%
Argentina	3	3.3
Brazil	10	11.1
Chile	3	3.3
Colombia	11	12.2
Ecuador	0	0.0
Spain	40	44.4
USA (Hispanic productions)	5	5.6
Mexico	13	14.4
Peru	0	0.0
Portugal	0	0.0
Uruguay	0	0.0
Venezuela	0	0.0
CO-PRODUCTIONS (total)	5	5.6
Spanish co-productions	3	3.3
Obitel co-productions	2	2.2
TOTAL GENERAL	90	100.0

Source: Obitel Spain

The series is the dominant format, with a sequencing in episodes – generally with chapter structure – that ranges between 6 and 18 and an average duration of approximately 30 minutes for comedies, and between 45 and 60 minutes for the rest of the productions.

Table 7. VOD Formats of national and Ibero-American fiction

Format	National				Ibero-american			
	Titles	%	C/E	%	Titles	%	C/E	%
Serial/Telenovela	0	0.0	0	0.0	9	19.1	573	63.4
Series	40	93.0	315	97.2	38	80.9	331	36.6
Miniseries	2	4.7	4	1.2	0	0.0	0	0.0
TV movie	0	0.0	0	0.0	0	0.0	0	0.0
<i>Unitario</i>	0	0.0	0	0.0	0	0.0	0	0.0
Anthology	1	2.3	5	1.5	0	0.0	0	0.0
Others (<i>soap opera</i> , etc.)	0	0.0	0	0.0	0	0.0	0	0.0
Total	43	100.0	324	100.0	47	100.0	904	100.0

Source: *Obitel Spain*

4. Fiction and audience participation in digital environments

Open-access fictions and VOD platforms have concentrated their transmedia expansion mainly on social networks and new sound formats. Among their strategies stands out the microsite “lavalla2045.com”, for *La Valla* which, in addition to the classic sections (characters, best moments, etc.), includes exclusive content: a clandestine radio station; a compilation of mobile videos about the series’ dystopian world and a ration card, whose coupons offer access to complementary material. Like #Luimelia, this series also takes advantage of social networks to make viral content by creating stickers.

Premiere fictions continue to inspire special debate programs (*Más de Veneno: El Documental* or *Patria: Detrás de la Serie*) or about the topics it addresses (*Hit* and *¿Quién educa a quién?*). *Patria* and *La*

Línea Invisible, two fictions focused on ETA, also have documentary podcasts, while other universes well known to the audience (*La que Se Avecina*, *Vis a vis*, and *Acacias 38*) expand as podcasts.

Reference productions in their transmedia expansion have not stopped innovating either. Two weeks before the premiere of its fourth season, *El Ministerio del Tiempo* launched the 10-minute prequel “Antes de que no haya tiempo”, which bridges the gap between the last two seasons. *Skam Spain* held a “live” party to promote the episode “El concierto” and, although the clips of said episode were already recorded, the party was reproduced in detail to make live updates on social networks and invite a score of fans. The initiative made the hashtag #SkamSpain the first trend on Twitter Spain, and it was among the main trends in Chile, Mexico and Peru.¹⁶

4.1. #Luimelia, transmedia and social audience

The couple formed by Luisita and Amelia, from the serial *Amar Es para Siempre*, enjoy great popularity on social networks and have ended up becoming a viral phenomenon. The volume of tweets increased by more than 1,000% between the sixth (2017-2018) and the seventh season (2018-2019), as the audience increased the *shippeo* (a term that fans use to refer to the relationship between the two female characters), catapulting the series from position 36 (T6) to position 2 (T7) on the Social TV ranking¹⁷. The enthusiasm aroused by the serial led Atresmedia to turn this love story into an independent universe. This is how #Luimelia was born. With a hashtag as a nod to the fans and the digital environment in which the production was born, the Atresplayer Premium fiction moves Luisita and Amelia from 1977 (the

16 https://files.mediaset.es/file/10002/2021/02/24/FY_20_SPANISH_CNMV_f7a7.pdf

17 Noticia de <https://diagonalTV.es/noticia/arranca-la-segunda-y-tercera-temporada-de-luimelia/>

year of the original setting of their relationship in *Amar Es para Siempre*) to 2020.

With the goal to have fans enjoy and connect as much as possible with the fiction, #Luimelia completes the experience by combining the broadcast of the episodes with the social networks of both female characters. On their Twitter and Instagram profiles, the popular couple posts unpublished content from their daily lives, gives their opinion on current affairs, interacts with each other, with other characters in the series and with their followers, who feel them as close as real people. At the end of 2020, the accounts of the lead characters already totaled more than 16,000.

The two seasons released during 2020 were social audience hits. In December, #Luimelia exceeded 718,000 tweets and accumulated more than 180 million real impressions and 42 national trending topics. In addition, all the episodes of the first season were in the top 10 of the ranking of the most talked about of all televisions and platforms, while those of the second season increased their visibility and are among the first three positions.¹⁸

5. Highlights of the year

The didactic character of La1's fictions is evident in all its formats, with bets as innovative and risky as some VOD premieres. The teen series *HIT* (1,490,000 viewers and 9.1%) portrays the extreme behaviors of a group of school-aged children in their relationship with issues as relevant to young people as sex, addictions, social networks, etc. *Néboa* (1,235,000 viewers and 8.4%), one of the

18 https://premium.atresplayer.com/luimelia/noticias/estreno-tercera-temporada-proximo-mes-enero_202012115fd3828559ccfa000179d602.html

most notable Spanish series of 2020, is a fast-paced thriller set in the misty landscapes of a small Galician island where a series of murders take place, apparently related to other crimes of the past. The return of the fourth season of *El Ministerio del Tiempo* (1,298,000 viewers and 8.0%), after the exclusive airing of the third installment on Netflix, has once again fulfilled the expectations of its followers with episodes as memorable as, for example, the crossover between the poet Federico García Lorca, murdered at the beginning of the Spanish Civil War, and the flamenco singer Camarón de la Isla, who died in 1992.

The regional televisions, whose 18 titles this year exceed the open-access premieres of national televisions, have experienced a less marked decline in the audience than the latter. The second season of *Les de L'Hoquei* (357,000 viewers and 13.5% share) tops a ranking led once again by TV3 fictions, among which the youth dramedy *Drama* stands out (280,000 viewers and 11.5% of share), a bilingual series also aired by Playz and YouTube, which has sparked a heated controversy on social networks about the combined use of Catalan and Spanish. *La fossa* (205,000 viewers and 9.2 share), another of the novelties of the Catalan channel, is a thriller with a slow pace and a cinematic look that, like *Néboa*, has a policewoman in the lead. Same as the TVG thriller *El Sabor de Las Margaritas* (74,000 viewers and 8.3%), whose first season became the most watched foreign-language fiction on Netflix in the UK and Ireland last April.¹⁹

The 44 VOD fiction premieres in 2020 offer a wide range of genres and themes that reflect the diversity, versatility and high average quality of Spanish fiction production. Once again, Movistar+ is the platform with the highest number of titles (10) in an extremely competitive year. The police show *Antidisturbios* has been the most-

19 <https://www.farodevigo.es/sociedad/2019/05/11/sabor-margaritas-triunfa-reino-unido-15697207.html>

watched series on the Telefónica platform and one of the best valued, with a sustained audience of over 80% (nine out of ten people who have started to watch it have finished it)²⁰. It is followed by *La Línea Invisible*, about the foundation of ETA and the first murders committed by the armed gang, and *La Unidad*, a sophisticated policeman with impeccable workmanship, set in the fight against jihadist terrorism. The retrospective look at ETA is also the objective of *Patria*, an adaptation of the homonymous novel by Fernando Aramburu that shares the spotlight on HBO with *30 Monedas*, the horror thriller with paranormal elements by filmmaker Álex de la Iglesia.

Atresplayer includes among its most popular fictions two claims of gender diversity: the aforementioned *#Luimelia* and *Veneno*, the biopic of a transsexual devoured by the exhibitionist television of the late night shows of the nineties. The latter, re-broadcast by Antena3 in October, obtained an average of 2,424,000 viewers (16.9% share), 2.5 points above the most viewed fiction of the year, *Cuéntame Cómo Pasó*, which places it in the 18 position of ranking of the most watched programs. On the contrary, the retransmission on Tele5 of his comedy *La que Se Avecina*, after the premiere of its twelfth season on Amazon Prime Video, has not suffered the same fate (1,536,000 viewers and 9.2% share).

In addition to the five Tele5 fictions aired on Amazon Prime Video, the Mediaset group also has two other premiere series this year on HBO and Netflix respectively: the aforementioned *Patria* and the second season of *Vivir sin Permiso*, which on this occasion has prioritized drama over thriller.

The third season of *Élite* constitutes Netflix's commitment to teen series, with this youth drama becoming one of the most viewed fictions worldwide on the North American platform. Netflix also in-

20 <https://comunicacion.movistarplus.es/email/antidisturbios-ya-es-la-serie-mas-vista-en-movistar-este-2020>

cludes among its eight 2020 premieres the fifth and final season of *Las Chicas del Cable* and the adaptation of Carlos Montero's thriller *El Desorden que Dejas*, of which he is also a director and screenwriter. Finally, it is worth highlighting the debut of Spanish OrangeTV with three thrillers: *Caminantes*, the aforementioned *The Head* and the co-production with Finland *Kosta. The Paradise*.

6. Topic of the year: the fiction industry in times of pandemic

The first year of the pandemic paralyzed the audiovisual industry. All television shootings were postponed, including those of national fiction, which by mid-March amounted to about thirty²¹. Other tasks in the production chain were also affected, although thanks to technology they were adapted to virtual scriptwriting, as well as the pre and post-production processes.

The highlight of the year came from the television industry itself, which tried to turn imposed need into creative opportunity. Thus, it set out to reflect on confinement from the realization of fictions in exceptional conditions, those allowed inside homes. A response that aspired to remedy the lack - and the delay - of premieres in full social isolation due to the coronavirus, as well as providing a constructive audiovisual representation of that unprecedented experience that we were discovering. Confinement and Covid-19 instantly emerged as inspirational themes for creating television fiction. Public channels and VOD platforms produced and aired fictions whose content dealt with and showed the reality of the crisis.

The first initiatives came from the public networks. TV3 premiered on April 1 *Jo També Em Quedo a Casa*, a daily tragicomedy

21 https://vertele.eldiario.es/noticias/Todas-series-suspendidas-canceladas-coronavirus-espana-estados-unidos-usa_0_2213478646.html

of 20 episodes, produced by Yumagic, written by Blanca Bardagil and Sergi Cervera, and directed by the latter. It raises the issue of the emotional separation of a couple that is forced to live together due to confinement. It is a brief proposal, 15 minutes per chapter and technically austere, which uses standard fixed shots in the interactions between characters inserted through supposed video calls and social networks. The filming took place in a few days, with two technicians who traveled to the actors' houses and recorded with an elementary set: microphone, camera and a couple of spotlights.

A week later, TVE premiered *Diarios de Cuarentena* during prime time, an initiative of Morena Films, written and directed by Álvaro Fernández-Armero and David Marqués. It was presented in a sitcom format, with eight episodes of 30 minutes each in continuity, based on intertwined plots that narrated different daily experiences lived in confined homes. The local customs and manners story sought to reflect current affairs through humor, entertaining the audience and empathizing with it through comic situations of seclusion. It was set in a dozen houses and interpreted by actors, couples and partners, who were also in charge of the filming, decoration, costumes and makeup. Despite the modest audience (8.4% share), TVE announced the sale of the format for adaptation in France and Mexico.²²

The VOD platforms chose to commission work from different filmmakers to form anthological series, whose common theme was the pandemic or confinement. HBO Spain turned to young filmmakers – Leticia Dolera, Rodrigo Sorogoyen, Paula Ortiz, Carlos Marques-Marcet, Elena Martín – to compose *En casa*, a miniseries made up of five medium-length films of 15 to 40 minutes each, which address, through different genres, the particular view of the filmmakers from and about

22 https://vertele.eldiario.es/noticias/Diarios-de-la-Cuarentena-Espana-Tendra-adaptaciones-Francia-Mexico_0_2222477770.html

the confinement. In general terms, one glimpses an authorial collection, where personal relationships make up the common denominator that intertwines the disparity of the stories. Despite the limitations of the confinement, the production of the series was carried out in record time, since not even two months elapsed between the announcement of the project (April 14) and its premiere (June 3).

A month later, Amazon Prime Video joined with a similar compilation: *Relatos Con-fin-a-dos*, a creation by Álvaro Longoria and Cecilia Gessa also shot during the confinement by a dozen actors in their homes. Its five self-concluding episodes, of 20 minutes each, were directed by Fernando Colomo, Miguel Bardem, Juan Diego Botto and the creators of *Diarios de Cuarentena*: Álvaro Sánchez-Armero and David Marqués. In this case, the narratives share the theme of isolation from singular approaches, with unexpected plot twists.

The original series of the platforms presented personal, asymmetrical and artistic stories. The narrated stories extended the representation of confinement, expanded the plurality of collective memory and complemented, through more experimental proposals, the stories offered by public channels, more often based in everyday situations. It was about fulfilling a mission of an emotional nature, which evidenced identification with the audience through humor, empathy and some examples of collectivity, contact and collaboration between people.

With these proposals, the industry has proven initiative, creative avidity, dynamism and ability to adapt to the circumstances. There is also a certain aesthetic precariousness -homogenization of resources, plans, sets- and narrative simplification due to the lack of time, resources and technical professionals. In any case, the different contributions make up a testimonial fiction of the pandemic that has functioned as a multifaceted and diverse chronicle, executed during the first wave of infections when the maximum restrictions on mobility

prevailed, with the difficulties that this entailed: creating and planning quickly, overcoming technical difficulties and expressiveness with a slower narrative rhythm.

At the juncture of the confinement, the working model adopted a similar form. Each household of actors received a telephone, a microphone and a tripod to record their scenes. The artistic cast added to the interpretive tasks other techniques - from camera operator to makeup artist - with limited resources. Then they sent the recorded material to the editors and directors - who had previously rehearsed and provided technical instructions to the cast by video call - while the scriptwriters wrote against the clock.

Beyond the titles cited, the rest of the fictions resisted incorporating the pandemic into their narrative universes. Adding the virus in the new plots entailed the risk of normalizing it and involved changing the tone and aesthetics of the projects, in addition to losing the expression of the interpreters under their face masks. In fact, the only production where the coronavirus was inoculated was *Cuéntame Cómo Pasó*. The scriptwriters proposed for season 21 (which will begin on January 14, 2021) a time jump from 1992 to 2020, to show the incidence of the pandemic, which places the Alcántara's youngest daughter fighting the virus in the front line as a doctor while the writer son takes care of his parents. The temporary alteration and its connection with the present is justified by valuing the pandemic as an event so extraordinary that it manages to occupy a privileged place in the album of the country's historical moments represented as a mirror in the series.

Regarding the distribution of fiction in streaming on free channels, it is worth mentioning the Spanish-Australian co-production *Cancelled* (Screen Australia), which tells the story of its protagonists

-the actress María Albiñana and the film director Luke Eve- who had to cancel their wedding at the last minute due to the coronavirus and confine themselves with his mother, in Valencia. A naturalistic story, halfway between comedy and drama, articulated in 10 chapters, each 9 minutes long, which premiered on Facebook, went to the VIX platform -where it achieved two million views in 48 countries- and won several international awards, such as the best series of 2020 at the British Web Awards.²³

Given the global paralysis and the uncertainty generated by the evolution of the epidemic, the reactivation of television fiction production was not reached until the end of May, in phase 1 of the de-escalation. The productions then resumed filming, in a staggered manner, although conditioned by the protocols required by the Ministry of Health and prepared by, among others, the Aggrupation of Audiovisual Associations (AAA) or the Association of Television Fiction Directors (*Dirige*), in order to avoid occupational risks and new infections. Among the measures, the following stood out: limitation of 25 people in the capacity of the set, carrying out PCR tests, taking the temperature, expansion of spaces to maintain the safety distance, online casting or equipment for disinfection of areas, material and clothing. It is estimated that the measures increased the cost of production between 2 and 10%.²⁴

The wave of the pandemic also reached the scripts. For example, in the serials with intense recording rhythms (*Mercado Central*, *Amar Es para Siempre* and *Acacias 38*) the scripts were rewritten to adapt them to new filming needs, reduce the number of extras, delay

23 https://www.eldiario.es/sociedad/serie-confinamiento-cancelled-gana-5-premios-british-web-awards_1_6475378.html

24 <https://www.elmundo.es/cultura/cine/2020/06/24/5ef2003ffc6c83f8018b45ef.html>

certain plots or avoid sequences with physical contact²⁵. Some of the new scenes were solved with ellipsis or recorded in layers five feet apart and then staged in parallel to give the impression that the performers were together when in fact they were captured separately.

Television fiction emerged as an essential and recurring entertainment resource for audiences during the pandemic. It was able to reinvent itself and assumed functions of representation, containment and relief at this critical moment in recent history.

25 <https://elpais.com/television/2020-05-02/como-devolver-la-normalidad-a-la-television-tras-la-crisis-del-coronavirus.html>

6

U.S. HISPANIC:

TELEVISION IN THE TIMES OF A PANDEMIC¹

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Introduction

The Covid-19 pandemic has been not only a health crisis challenge that society had to face through different measures such as sanitation, isolation and lockdowns in contemporary times, but also has underscored and exacerbated events and phenomena within U.S. socio-cultural and political realities with an effect that defined the direction of the country. The lockdown that the population has endured because of the pandemic, drove people to find solace or shelter in the television screens and digital platforms,

¹ On behalf of Obitel, we would like to express our deep gratitude to Brad Poretskin *Senior Vice President, Audience Measurement* at Nielsen, Emily Vanides *Senior Vice President, Client Business Partner* at Nielsen, and Elizabeth Oldis *Client Solutions Manager* 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.

looking for information about what was happening around them at local, but also at national levels, as never before. This made more visible different social problems, such as racism, xenophobia, police brutality, which became central issues in the current electoral campaigns for the presidency. Two of the most visible signs were, on the one hand, the national protests called by the *Black Lives Matters* movement, which denounced police brutality against the African American population, and on the other hand, the surge of alt-right groups aligned to the ideology of white supremacy gathered through militia organizations in different places across the country. In this context, the 2020 presidential elections became a referendum on the kind of country it should be before the elections of two diametrically opposed candidates, not only as a result of their political agendas, but because of their personal styles to face the pandemic and the different social challenges before them. Donald Trump was looking for his reelection representing the Republican Party against Joe Biden, ex-vice-president from the Obama administration, representing the Democratic Party. The 2020 elections, produced a deep division, with pernicious effects at social levels, dividing families, friends, and co-workers because of electoral preferences.

Most likely, “the mood” of the audiences, who looked for a space to scape before the deadly reality of the pandemic and the deeply divided “socio-political” realities, it was reflected on the unexpected change in the consumption’s trend of fictional content in the last decade. The trend before the pandemic was a gradual but consistent decline in ratings on traditional telenovela before the surge of new action-driven narratives anchored in suspense and noir, targeting young and male audiences, exemplified by the

rise in ratings of narco-themed telenovelas, promoted by the network Telemundo as *Super Series*. This resulted in Telemundo's claim of the first place in ratings among audiences between 18 to 49 years old in 2019. In August 2020, Natalie Kritoef, a *New York Times* journalist, pointed out to this phenomenon arguing that audiences were looking for a space to escape from the harsh realities of the pandemic. Traditional melodrama seemed to offer an emotional shelter in turbulent times. The results obtained by Nielsen in terms of which were the fictional most watched titles seem to confirm this diagnosis. The traditional telenovela was the big ratings winner in 2020. Univision reclaimed its ratings hegemony and its melodramas took all the positions in the ten most watched fictional titles list of 2020. In contrast, Telemundo did not have a strong or well know *Super Series* title as part of their fictional offer in this year. It is important to remember that in the last season of *El Señor de los Cielos*, the network lost Rafael Amaya from its leading role diminishing greatly the appeal of this *Super Series*.

It is also important to consider the finishing of a cycle of reordering in the Hispanic television industry in which all the corporations, with the only exception of Telemundo, changed ownership and went through a corporate and institutional reordering.

1. U.S. Hispanic audiovisual context in 2020

1.1 Open TV in the U.S. Hispanic market

The selling of the Hispanic media conglomerate Univision Communications Inc. to Searchlight Capital Partners LP and Forge-Light LLC in 2020, closed a period of profound corporate transformation of the national Spanish language broadcasting television networks in the United States. The result of these changes has been the transfer from Latina/o and/or Latin American owners to financial entities and Corporate America ownership. The very same trend that happened with Hispanic radio and newspapers, is now happening to national television broadcasters. First it was Azteca America, a property of Mexican TV Azteca (owned by the Salinas Group), that was bought by the corporation HC2 Holdings in 2017. Later, in 2019, EstrellaTV, a television network as subsidiary of Liberman Media, owned by Lenard Liberman, a Mexican-American, was bought by HSP Investment Partner LCC. Now, Univision Communication Inc. is bought by Searchlight Capital and Forge-Light (both with 64% of the shares), while Televisa keeps the 36% of the company's ownership. Televisa keeps its programming and advertising agreements with the new owners, which makes Univision the only national broadcasting television corporation that still preserves ownership from a Latina/o or Latin American person or entity in the United States. Telemundo, the other hegemonic national Spanish language television network, is a subsidiary of the media corporation NBC-Universal, a division of the telecommunication giant Comcast.

Chart 1. Hispanic national television networks in the U.S.

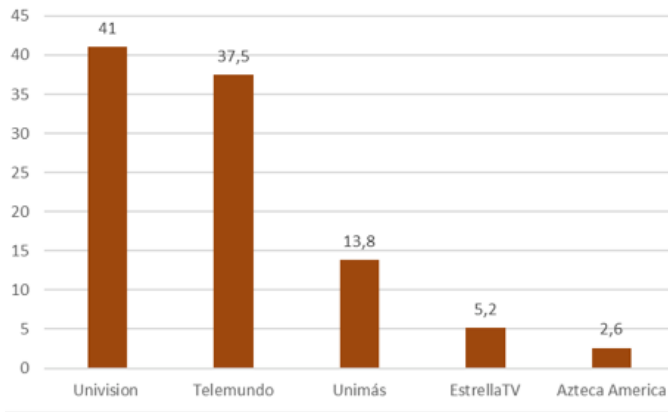
Private channels
Azteca America
EstrellaTV
Telemundo
UniMás
Univision
CHANNELS: 5

Source: *Obitel U.S. Nielsen*

In 2020, the sister networks Univision and UniMás had an increase on audience’s share in the Hispanic television market in contrast to 2019; while Telemundo, EstrellaTV and Azteca America saw a decrease on their numbers.

Graph 1. TV audience’s share by network

Channel	Share % HHL D
Univision	41.0
Telemundo	37.5
Unimás	13.8
EstrellaTV	5.2
Azteca America	2.6
TOTAL	100

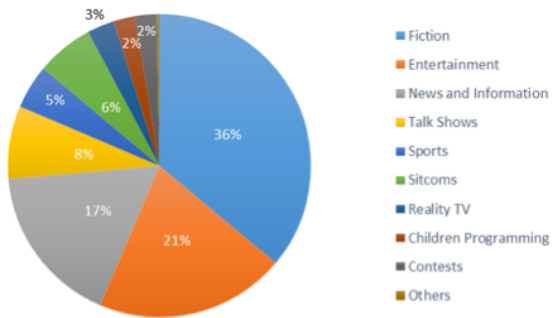


Source: Obitel U.S. - Nielsen

In relation to the programming offer by television genre, fiction keeps its leadership in the screen in terms of programming hours, followed by entertainment and news. Fictional content had a slight increase on its offer in relation to 2019, with one percentage point up. But the trend of keeping its presence around the 35% to 36%, is way too low from the visibility that this genre had during the first half of the 2010 decade, in which represented at least the 40% constantly. News had a slight increase in relation to last year, and entertainment had a marginal decrease, but numbers were mostly consistence in comparison to those of 2019. The most visible variation happened in the realm of sports, which offering fall from the 6.7% in 2019, to 4.7% in 2020, because of the cancellation of sporting events due to the pandemic.

Graph 2. TV programming by genre

Broadcast genres	Hours	%
Fiction	11 675:53	36.1
Entertainment	6 594:14	20.3
News and Information	5 573:46	17.2
Talk Shows	2 527:33	7.8
Sports	1 524:47	4.7
Sitcoms	1 975:54	6.1
Reality TV	928:03	2.9
Children Programming	743:00	2.3
Contests	758:00	2.3
Others	81:28	0.3
TOTAL	32 382:39	100.0



Source: Obitel U.S. - Nielsen

1.2. Pay TV and VoD platforms in Hispanic television

In 2020, Galavisión maintained its leadership as the most watched pay television network in Spanish in the U.S.; while TDUN (sports) kept its second place. Both networks are subsidiaries from Univision Communication Inc. In third place, Universo, climbs one place with a key increase on audiences. Universo is the sister pay TV of Telemundo, a subsidiary of NBC-U/Comcast. It is important to underscore that, with the exception of the Univision owned networks, all the most watched pay television networks are subsidiaries from the largest media corporations in the U.S., NBC/Comcast, Fox Corporation, Disney, Discovery Inc., ATT/Warner Media and the Mexican corporation MVS.

Chart 2. Pay television networks in the U.S.

Most watched pay TV Networks in 2020
1) Galavisión (general), 2) TDUN (sports), 3) Universo (general), 4) Fox Deportes (sports), 5) Discovery Familia (information), 6) ESPN Deportes (sports), 7) Cine Latino (movies), 8) Discovery en Español (information) 9) CNN en Español (news), 10) Nat Geo Mundo (information)
TOTAL: 10 channels

Source: Obitel U.S. Nielsen

In 2020, several new players emerged in the SVoD landscape of streaming, as well as television networks offering their content online. To the already established SVoD players lead by

Netflix, Amazon Prime, Hulu, Disney+ and AppleTV+, were joined in 2020 with HBOMax (formerly HBO Now, WarnerMedia), Peacock (NBC-Universal/Comcast), and in 2021 Paramount+ (formerly CBS All Access, Viacom).

In the realm of Spanish language television, Univision have its digital services UVideos and Univision Now, but it has been working on collaboration with Televisa to launch a new platform named PrendeTV, to enter fully in competition to the other larger conglomerates. For its part, the Telemundo’s App offers its programming catalog on demand, and it’s also integrated into the offering of the Peacock platform from NBC/Comcast.

Chart 3. VoD in the United States

Main active VoD platforms in 2020	Total
Netflix, Prime Video (Amazon) Hulu (Disney), Disney+, HBOMax (ATT/WarnerMedia), Paramount+ (Viacom/CBS), Peacock (NBC/Comcast) AppleTV+	8
TOTAL	8

Source: Obitel U.S.

1.3 Independent house productions in television fiction

Argos Comunicación, TeleColombia (formerly FoxTeleColombia, now owned by Disney), W Studios and Lemon Studios are the four most important independent production houses for their

key role in the production of fiction for the main national television Spanish language networks in the United States. In particular, Argos Comunicación, has become, in the last decade, the central piece in the production formula of success from Telemundo, followed by TeleColombia, while W Studios and Lemon Studios have also produced key successful fictional titles for Televisa and Univision.

1.4. Audiovisual sector's sources of funding

Based on the fourth quarterly report and annual financial report, Univision Communication Inc. and Comcast (owner of Telemundo) presented a decrease in their net revenues in 2020, in relation to the 2019. Univision decreased its net revenues from USD \$2.68 billion dollars in 2019, to USD \$2.54 billion. While Comcast reported net revenues of USD \$103.5 billion dollars in 2020, below the USD \$108.9 billion dollars from 2019. Also, the financial results from the fourth quarterly report from HC2 (owner of Azteca America), show a decrease in the consolidated net revenues with USD \$ 1,005 million dollars in 2020, below to the USD \$1,077 million dollars in 2019. There is not information available in the case of EstrellaTV, which is now a subsidiary of Estrella Media.

1.5. Communication policies

One of the most important issues in regards to media policies in 2020 was the possibility to establish a regulatory framework for the operation of Silicon Valley corporations, in particular in relation to the bigger multinational corporations which control social media such as Facebook/Instagram/WhatsApp, Twitter, Google/YouTube, Apple and TikTok. The debate was triggered by

the large amount of misleading information that circulates in these platforms, as well as the increase on the hate speech, particularly in ascendancy during the presidency of Donald Trump. This discussion carries the distinction between the rights of free speech given by the constitution and the ones of hate speech. Corporations of social media are protected against litigations and lawsuits, because in contrast to media corporations, they are not considered as the authors of the content published through their platforms. As private companies they can follow their own rules in relation to censorship or the elimination of any content in their digital spaces. The huge disinformation flows in social media networks triggered the creation of special sessions with lawmakers in Washington, in which the owners of these companies were questioned and asked for a more proactive position in relation to the prevention of hate speech and disinformation. However, they were unable to create an official regulation for these objectives.

1.6. Infrastructure of digital and mobile connectivity

Accordingly with the Pew Research Center, the 98% of the population in the United States has a mobile telephone, and the 81% are smart phones. 96% of Hispanics in the U.S. has a mobile, and 79% own a smart phone. The 74% of the adult population has a desktop or a laptop, and 52% has a tablet. But the young population, and social minorities, including Latina/os and the poorest population in the U.S., rely on smart phones to have access to internet services. The same center reports that 90% of the adult population uses internet, while in the case of the Hispanic adult population is 86%. Furthermore, 73% of the general popu-

lation have access to broadband services. But in the case of the Hispanic population, they have only 61% access to broadband in contrast to 66% of African American population, and 71% of the white population. Mobile telephone dependency to have access to internet is of 12% of the white population, 23% of the African American population, and 25% of the Hispanic population (Pew Research Center, 2019).

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

The impact of Covid-19 in the programming lineups in 2020 was felt in the reduction of premiere titles released during that year. In 2020 there were released only 28 new titles, way below the 45 titles premiered in 2019. In 2020 there were 46 reruns only 4 below the 50 rerun titles on 2019. In relation to national premiere titles, the decrease was of 3 titles, from 12 in 2019 to 9 in 2020. In the realm of *Obitel* premiered titles, the decrease was more profound: there were only 19 new titles, in contrast to the 33 released in 2019. It is important to emphasize that the decrease in new titles was compensated, not in the number of reruns titles including in the programming lineup, but by the number of total hours that these reruns represented.

Table 1. Fictions broadcast in 2020 (national and imported; premiered, reruns and co-productions)

PREMIERE NATIONAL TITLES – N° 9

Telemundo – N° 7 national titles

1. *100 Días Para Enamoraros* (telenovela)
2. *Decisiones: Unos Ganan, Otros Pierden* (unitario)
3. *La Doña 2* (telenovela, U.S. - Mexico)
4. *Enemigo Íntimo 2* (telenovela, U.S. - Mexico)
5. *Falsa Identidad 2* (telenovela, U.S. - Mexico)
6. *Operación Pacífico* (telenovela, U.S. - Colombia)
7. *El Señor de los Cielos 7* (telenovela, U.S. - Mexico)

Univision – N° 1 national title

8. *El Dragón: El Regreso del Guerrero* (telenovela, U.S. - Mexico)

UniMás – N° 1 national title

9. *Dani Who?* (series, U.S. - Mexico)

PREMIERE IMPORTED TITLES – N° 19

Azteca America – N° 1 titles

10. *Bajo el Alma* (telenovela – Mexico)

Telemundo – N° 2 titles

11. *La Ley del Corazón* (telenovela – Colombia)
12. *Sobreviviendo Escobar* (telenovela – Colombia)

Univision – N° 15 titles

13. *Cita a Ciegas* (telenovela – Mexico)
14. *Como Dice el Dicho* (unitary – Mexico)
15. *Como Tu No Hay 2* (telenovela – Mexico)
16. *Dulce Ambición* (telenovela – Brazil)
17. *Hijas de la Luna* (telenovela – Mexico)
18. *Imperio de Mentiras* (telenovela – Mexico)
19. *Me Declaro Culpable* (telenovela – Mexico)
20. *M.D. Línea de la Vida* (telenovela – Mexico)
21. *Ringo: La Pelea de la Vida* (telenovela – Mexico)
22. *La Rosa de Guadalupe* (unitary – Mexico)
23. *Rubi 2020* (telenovela – Mexico)
24. *Sin Miedo a la Verdad* (unitary – Mexico)
25. *Te Doy la Vida* (telenovela – Mexico)
26. *Vencer el Desamor* (telenovela – Mexico)
27. *Vencer el Miedo* (telenovela – Mexico)

UniMás – N° 1 title

28. *Esta Historia Suena* (unitary – Mexico)

RERUNS TITLES– N° 46

Azteca America – N° 6 titles

29. *Ángel Alas del Amor* (telenovela - Mexico)
30. *Así en el Barrio como en el Cielo* (telenovela – Mexico)
31. *Cada Quien su Santo* (unitary - Mexico)
32. *Lo Que Callamos las Mujeres* (unitary – Mexico)
33. *La Mujer de Judas* (telenovela - Mexico)
34. *Mujeres Rompiendo el Silencio* (unitary – Mexico)

EstrellaTV – N° 3 titles

35. *El Capo* (telenovela - Colombia)
36. *Historias Delirantes* (Anthology – Mexico)
37. *Secretos* (Anthology – Mexico)

Telemundo – N° 9 titles

38. *El Clon* (telenovela – U.S. - Brazil)
39. *Decisiones* (unitary – U.S.)
40. *Decisiones Extremas* (unitary – U.S.)
41. *La Doña Edición Especial* (telenovela – U.S. – Mexico)
42. *Dueños del Paraíso* (telenovela – U.S.)
43. *Historias de la Virgen Morena* (unitary – U.S.)
44. *José José: El Príncipe de la Canción* (telenovela – U.S.)
45. *Reina del Sur 2 Edición Especial* (telenovela – U.S.)
46. *Yo Soy Betty, la Fea* (telenovela - Colombia)

Univision– N° 8 titles

47. *Destilando Amor* (telenovela – Mexico)
48. *La Fuerza de Creer 2* (webseries – U.S.)
49. *Inocente de Ti* (telenovela – Mexico)
50. *Mañana es para Siempre* (telenovela - Mexico)
51. *Papa a Toda Madre* (telenovela - Mexico)
52. *Que te Perdona Dios* (telenovela - Mexico)
53. *Simplemente María* (telenovela – Mexico)
54. *Un Gancho al Corazón* (telenovela, Mexico)

UniMás – N° 20 titles

55. *Alborada* (telenovela, Mexico)
56. *Amigas y Rivaldes* (telenovela, Mexico)
57. *Amores Verdaderos* (telenovela, Mexico)
58. *Bella y las Bestias* (telenovela, U.S.)
59. *Blue Demon 3* (serie, Colombia, Mexico, U.S.)
60. *La C.Q.* (series, Mexico, U.S.)
61. *Contra Viento y Marea* (telenovela, Mexico)

62. *Corona de Lagrimas* (telenovela, Mexico)
63. *En Tierras Salvajes* (telenovela, Mexico)
64. *Hasta que el Dinero nos Separe* (telenovela, Mexico)
65. *El Hotel de los Secretos* (telenovela, Mexico)
66. *Mariana de la Noche* (telenovela, Mexico)
67. *Mi Corazón es Tuyo* (telenovela, Mexico)
68. *Pasión y Poder* (telenovela, Mexico)
69. *La Que No Podía Amar* (telenovela, Mexico)
70. *Que Pobres Tan Ricos* (telenovela, Mexico)
71. *La Reina Ester* (miniseries, Brazil)
72. *Rosario Tijeras* (telenovela, Mexico)
73. *Sortilegio* (telenovela, Mexico)
74. *La Vecina* (telenovela, Mexico)

Five Turkish titles

1. *Cenet* (telenovela, Turkey)
2. *Todo por mi Hija* (telenovela, Turkey)
3. *Amor Eterno* (telenovela, Turkey)
4. *Pájaro Soñador* (telenovela, Turkey)
5. *¿Qué Culpa Tiene Fatmagul?* (telenovela, Turkey)

TOTAL PREMIERE NATIONAL TITLES: 9

TOTAL PREMIERE OBITEL TITLES: 19

TOTAL PREMIERE TITLES (NATIONAL AND OBITEL): 28

TOTAL RERUNS: 46

TOTAL TITLES: 74

Source: *Obitel U.S. - Nielsen*

It is important to point out that besides the 46 reruns, which are titles scheduled in 2020 but that were already premiered before 2020, the strategy of Telemundo has been also the use of repetitions. In this case, repetitions are the titles that premiered in 2020, most likely in prime time, but that are rebroadcast commonly hours later in the “late fringe” time slot at midnight or at 1:00 AM.

In spite of the fact that there were only 9 premiered national titles, 3 below the 12 from 2019, they actually represented the 32%, above the 26% of the titles in 2019, that in terms of num-

ber of episodes they represented the 22% in 2020, above the 20% from 2019. Furthermore, in terms of number of hours, the national premiered titles represented the 23% of the premiered hours, three points above the 20% from 2019.

Table 2. Premiere fiction in 2020: Hispanic U.S.

Country	Titles	%	Chapters/ Episodes	%	Hours	%
NATIONAL (total)	9	32.1	357	22.3	366:41	22.8
OBITEL COUNTRIES (total)	19	67.9	1244	77.7	1243:54	77.2
Argentina	0	0.0	0	0.0	0:00	0.0
Brazil	1	3.6	77	4.8	76:48	4.8
Chile	0	0.0	0	0.0	0:0	0.0
Colombia	2	7.1	154	9.6	154:0	9.6
Ecuador	0	0.0	0	0.0	0:0	0.0
Spain	0	0.0	0	0.0	0:0	0.0
U.S. (Hispanic production)	9	32.1	357	22.3	366:42	22.8
Mexico	16	57.1	1013	63.3	1013:0	62.9
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
COPRODUCCIONES (total)	7	25.0	286	17.9	295:42	18.4
U.S. coproductions	7	25.0	286	17.9	295:7	18.4
Coproductions countries Obitel	0	0.0	0	0.0	0:0	0.0
TOTAL	28	100.0	1601	100.0	1610:35	100.0

Source: *Obitel U.S. - Nielsen*

Obitel fictions represented the 78% of the premiered episodes, and the 77% of the premiered hours. In terms of country of origin, Mexico is still the most important provider for fiction in the Hispanic market, with 16 titles, but way below the 28 titles from 2019. However, the titles from Mexico represented only the 57% of

premiered titles, below the 62% from 2019. In terms of hours, they represented the 63%, slightly up from the 62% in 2019. Colombia and Brazil were second and third place as fiction provider countries, with 7% and 3.6% respectively in relation to the number of titles. Similar to the 6.7% and 4.4% in 2019, and consistent to the trend of the last decade. In contrast, while Obitel productions grew in number of titles, they decreased in number of episodes and hours.

Table 3. Formats of national and Ibero American fiction

Format	National						Ibero-American					
	Titles	%	C/E	%	H	%	Titles	%	C/E	%	H	%
Telenovela	7	77.8	333	93.3	342.41	93.5	15	78.9	913	73.4	913.10	73.4
Series	1	11.1	10	2.8	10.00	2.7	0	0.0	0	0.0	0.00	0.0
Miniseries	0	0.0	0	0.0	0.00	0.0	0	0.0	0	0.0	0.00	0.0
Telefilm	0	0.0	0	0.0	0.00	0.0	0	0.0	0	0.0	0.00	0.0
Unitary	1	11.1	14	3.9	14.00	3.8	4	21.1	331	26.6	330.44	26.6
Docudrama	0	0.0	0	0.0	0.00	0.0	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	0.0	0.00	0.0
Total	9	100	357	100	366.41	100	19	100	1244	100	1243.54	100

Source: Obitel U.S. - Nielsen

Table 4. The 10 most watched titles in broadcast television

	Title	Channel	Producer	Format /Genre	N° de chap./ ep. (2020)	Time Slot	Rating	Share
1	<i>Te Doy la Vida</i>	Univision	Televisa	telenovela melodrama	80	Prime time	7.5	17.1
2	<i>Rubí</i>	Univision	Televisa W Studios Lemon S.	telenovela melodrama	26	Prime time	6.8	17.0
3	<i>Como Tu No Hay Nada Dos</i>	Univision	Televisa W Studios Lemon S.	telenovela comedy drama	84	Prime time	6.6	17.4
3	<i>Ringo</i>	Univision	Televisa	telenovela melodrama	59	Prime time	6.6	14.1
5	<i>El Dragón</i>	Univision	Televisa Univision W Studios Lemon S.	telenovela crime drama	15	Prime time	6.2	15.6
6	<i>Vencer el Desamor</i>	Univision	Televisa	telenovela melodrama suspense	32	Prime time	6.2	15.3
7	<i>La Rosa de Guadalupe</i>	Univision	Televisa	unitary melodrama	118	Afternoon	5.8	14.2
8	<i>Médicos la Línea de la Vida</i>	Univision	Televisa	telenovela medical melodrama	81	Prime time	5.7	14.3
9	<i>Imperio de Mentiras</i>	Univision	Televisa	telenovela melodrama	62	Prime time	5.4	13.4
10	<i>Sin Miedo a la Verdad</i>	Univision	Televisa	unitary melodrama	35	Prime time	5.2	12.1

Source: *Obitel U.S. - Nielsen*

This table is an example of why Univision retook its leadership in ratings and audiences' share, by occupying all the spots from the ten most watched fictions list. It is important to point out that the four titles produced by W Studios and Lemon Studios in Mexico took four out of the five first spots in the list. Any of the Telemundo titles made it into the list of the most watched in 2020.

El Señor de los Cielos 7 reached the eleventh place of the list. It is important to underscore the achievements of the Turkish fictional titles. The most revealing data is that the fiction with the highest number ratings and audiences' share was *Amor Eterno*, a Turkish production broadcast in Univision. While in the case of Telemundo, the production with the highest rating and share was also a Turkish production titled *Todo por Mi Hija*, which had occupied the ninth place, if we have counted them into this list.

Table 4A. The 10 most watched national titles in broadcast television

	Title	Channel	Producer	Format /Genre	N° de chap./ep. (2020)	Time Slot	Rating	Share
1	<i>El Dragón</i>	Univision	Televisa Univision W Studios Lemon S	Telenovela	15	Prime time	6.2	15.6
2	<i>El Señor de los Cielos</i>	Telemundo	Telemundo Argos	Telenovela	24	Prime time	5.0	12.4
3	<i>La Doña 2</i>	Telemundo	Telemundo Argos	Telenovela	75	Prime time	4.1	8.8
4	<i>Operación Pacífico</i>	Telemundo	Telemundo Fox Telecolombia	Telenovela	44	Prime time	4.9	9.7
5	<i>Enemigo Íntimo 2</i>	Telemundo	Telemundo Argos	Telenovela	60	Prime time	3.6	9.8
6	<i>100 Días para Enamorarnos</i>	Telemundo	Telemundo	Telenovela	57	Prime time	3.5	8.3
7	<i>Falsa Identidad 2</i>	Telemundo	Telemundo Argos	Telenovela	58	Prime time	3.4	9.6
8	<i>Decisiones: unos Ganan...</i>	Telemundo	Telemundo	Unitary	14	Prime time	3.1	6.7
9	<i>Dani Who?</i>	UniMás	Viacom Argos	Series	10	Late fringe	0.3	1.6

Source: *Obitel U.S. - Nielsen*

El Dragón a coproduction between Univision and Televisa took the leading position in the most watch list of national titles. The list is dominated by Telemundo productions which is the leading networks in national production but which productions did not make it into the most watched titles of 2020.

Table 5. Audience profile of the 10 most watch titles: gender and age

Titles		Channel	Gender %	
			Women	Men
1	<i>Te Doy la Vida</i>	Univision	63.8	36.2
2	<i>Rubí</i>	Univision	65.8	34.2
3	<i>Como Tu no Hay Dos</i>	Univision	60.1	39.9
4	<i>Ringo</i>	Univision	62.8	37.2
5	<i>El Dragón</i>	Univision	62.4	37.6
6	<i>Vencer el Desamor</i>	Univision	64.8	35.2
7	<i>La Rosa de Guadalupe</i>	Univision	62.9	37.1
8	<i>Médicos la Línea de la Vida</i>	Univision	63.7	36.3
9	<i>Imperio de Mentiras</i>	Univision	64.3	35.7
10	<i>Sin Miedo a la Verdad</i>	Univision	61.2	38.8

Titles		Channel	Age group %					
			2 to 11	12 to 17	18 to 24	25 to 34	35 to 49	50+
1	<i>Te Doy la Vida</i>	Univision	10.8	4.7	6.2	11.7	20.9	45.8
2	<i>Rubí</i>	Univision	9.9	3.6	5.2	12.9	26.9	41.6
3	<i>Como Tu no Hay Dos</i>	Univision	11.1	5.0	5.7	12.5	25.4	40.3
4	<i>Ringo</i>	Univision	11.6	4.2	6.4	12.9	20.7	44.2
5	<i>El Dragón</i>	Univision	10.4	4.4	5.5	11.6	25.0	43.1
6	<i>Vencer el Desamor</i>	Univision	9.6	3.5	4.5	11.7	22.3	48.3
7	<i>La Rosa de Guadalupe</i>	Univision	11.8	4.9	6.3	12.1	22.2	42.6
8	<i>Médicos la Línea de la Vida</i>	Univision	8.6	4.7	5.3	12.3	21.7	47.3
9	<i>Imperio de Mentiras</i>	Univision	8.2	3.7	4.2	11.9	24.7	47.4
10	<i>Sin Miedo a la Verdad</i>	Univision	12.0	4.8	5.3	12.0	23.7	42.1

Source: *Obitel U.S. - Nielsen*

The dominance of Univision titles in the most watched fiction list, combined with the absence of Telemundo's *Super Series*, is showed in the demographic change in gender and age in the table. In relation to gender, the percentage of female audiences dominates the table with around the 63% of the audience, and only a 37% of male audience.

The absence of successful narco-themed telenovela titles from Telemundo, which were able to enter in the most watched list in 2019, such as *La Reina del Sur 2* or *El Señor de los Cielos 7* not only reduced the male presence in the audiences' demographics from the most watched in 2020, but also changed drastically the demographics in terms of age cohort. In 2020 there was a jump from 41% to 44% in the age cohort of 50 years old and more. In 2020 there was also a decrease on audiences of 18 to 49 years old, particularly in the group of 35 to 49 years old, in relation to 2019. The change in demography was shown in the increase of women and the group of 50 and more years old.

3. VoD monitoring in 2020

The most important players in the streaming market at global levels are U.S. corporations, in terms of number of subscriptions, consumption hours, investment amount, and the extension of their catalogs. In 2020, Netflix, Amazon Prime, Hulu, HBOMax, Disney+ dominated the landscape of SVOD services. At the end of the year, there was an increase on SVOD subscriptions. This increase was based on two combined circumstances: the confinement caused by the pandemic, and the interest that triggered the launch of Disney+ in the global market. Netflix still keeps its lead-

ership in terms of number of subscribers, but its range in percentage terms decreased with the entry of new different SVOD players such as AppleTV+, Peacock, and Paramount+ in early 2021. Netflix has already 209 million subscriptions, while Disney+ reached 100 million. HBOMax has 41 million, from which 18 were already subscribed to HBO. In spite of the slowing on Netflix subscriptions, only in 2020 the platform had 36 million new subscriptions at global levels (Zeitchik, 2021). In fact, from 2018 to 2020 the spending on SVOD subscription doubled in the United States from an average spending of 8 dollars a month to 16 (Blanco, 2021).

In the terrain of Spanish language television, Univision has its U-Video services, and Univision Now. As part of the changes deployed by Univision's new corporate administration, at the end of 2020 they announced the launch of PrendeTV, a streaming service (AVOD), exclusively dedicated to Hispanic audiences in the United States. PrendeTV will be a service with more than 30 channels, and more than 10 thousand hours of content in Spanish from global content providers. This is a key bet for the future of Televisa and Univision in the increasing growing market of VoD content (Univision to launch, 2021). For its part, Telemundo has an App for VoD content, and also offers its programming lineup through the Peacock platform. The television network also entered into an original production alliance in streaming services, and in 2020 joined with Telefonica, the Spanish telecommunication giant to coproduce with Movistar the series *Dime Quién Soy*. This series was premiered in Spain in 2020 and it is scheduled to be included in the Peacock catalog in 2021.

3.1. VoD's platforms market

Press reports pointed out that the Covid-19 pandemic not only increased audiences' consumption time of SVOD services, but also increased the number of SVOD subscriptions by the population. From an average of three SVOD services subscribed, audiences' subscriptions increased to four. This new trend was also accompanied with another factor: an increase rhythm of subscription cancellations. Audiences increased their number of SVOD subscriptions but they also became more selective in content consumption based on opening and cancellation data. This decision was related to specific titles and seasons (Daswani, 2020).

3.2. VoD analysis in 2020: national and Ibero American premiered fiction

Table 6. National and Ibero American premiere fictions in 2020 in VoD platforms

PREMIERE NATIONAL TITLES	PREMIERE IBERO AMERICAN TITLES	COPRODUC TION U.S. AND IBERO AMERICAN
<p>Netflix – N° 37 national titles <u>Hispanic No. 3</u> 1. <i>Selena</i> (series) 2. <i>On my Block</i> (series) 3. <i>One Day at a Time</i> (series)</p> <p>HBO – N° 21 national titles No Hispanic title</p> <p>Amazon – N° 11 national titles No Hispanic title</p>	<p>Netflix – N° 33 Ibero American titles 1. <i>Almost Happy</i> (comedy series - Argentina) 2. <i>Puerta 7</i> (drama series, Argentina – U.S.) * 3. <i>Chicas de Ipanema</i> (series, Brazil – U.S.) * 4. <i>Omnisciente</i> (series, Brazil – U.S.) * 5. <i>Espectros</i> (series, Brazil – U.S.) * 6. <i>Reality Z</i> (series, Brazil – U.S.) * 7. <i>El Reto del Beso</i> (series, Brazil – U.S.) * 8. <i>Buenos Días Verónica</i> (series, Brazil – U.S.) * 9. <i>3%</i> (series, Brazil – U.S.) * 10. <i>La Reina de Indias y el Conquistador</i> (series – Colombia) 11. <i>Amar y Vivir</i> (telenovela – Colombia) 12. <i>La Venganza de Analia</i> (series – Colombia) 13. <i>Siempre Bruja</i> (series, Colombia – U.S.) * 14. <i>Chichipatos</i> (series, Colombia – U.S.) *</p>	<p>Netflix – N° 0 titles</p> <p>HBO – N° 0 titles</p> <p>Amazon – N° 0 titles</p> <p>Hulu – N° 0 titles</p>

PREMIERE NATIONAL TITLES	PREMIERE IBERO AMERICAN TITLES	COPRODUC TION U.S. AND IBERO AMERICAN
<p>Hulu – Nº 18 national titles No Hispanic title</p>	<p>15. <i>El Robo del Siglo</i> (series, Colombia – U.S.) * 16. <i>Unstoppable</i> (series – Mexico) 17. <i>Narcos: México</i> (series, Mexico – U.S.) * 18. <i>La Casa de las Flores 3</i> (series – Mexico) * 19. <i>Diablero</i> (series – Mexico) * 20. <i>Control Z</i> (series, Mexico – U.S.) * 21. <i>Historia de un Crimen</i> (series, Mexico – U.S.) * 22. <i>Oscuro Deseo</i> (series, Mexico – U.S.) * 23. <i>Alguien Tiene que Morir</i> (miniseries, Mexico – Spain – U.S.) * 24. <i>Vis a Vis: El Oasis</i> (series – Spain) 25. <i>El Sabor de las Margaritas</i> (series – Spain) 26. <i>Velvet Collection; Final</i> (series – Spain) 27. <i>Los Favoritos de Midas</i> (series, Spain – U.S.) * 28. <i>El Desorden que Dejas</i> (series, Spain – U.S.) * 29. <i>Elite</i> (series, Spain – U.S.) * 30. <i>Las Chicas del Cable</i> (series, Spain – U.S.) * 31. <i>La Casa de Papel</i> (series, Spain – U.S.) * 32. <i>Valeria</i> (series, Spain – U.S.) * 33. <i>Alta Mar</i> (series – Spain) *</p> <p>HBO – Nº 4 Ibero American titles 34. <i>Entre Hombres</i>, (series, Argentina, U.S.) * 35. <i>Todxs Nosotrxs</i> (series, Brazil – U.S.) * 36. <i>Patria</i> (series, Spain – U.S.) * 37. <i>XHOXB</i> (series, Spain – U.S.) *</p> <p>Amazon – Nº 8 Ibero American titles 38. <i>El Presidente</i> (series, Chile - Argentina, U.S.) * 39. <i>El Cid</i> (series, Spain – U.S.) * 40. <i>De Brutas Nada</i> (series, Mexico – U.S.) * 41. <i>Pan y Circo</i> (series, Mexico – U.S.) * 42. <i>El Candidato</i> (series, Mexico, U.S.) * 43. <i>Como Sobrevivir Soltero</i> (series, Mexico – U.S.)* 44. <i>Caronte</i> (series, Spain) 45. <i>Pequeñas coincidencias</i> (series, Spain)</p> <p>Hulu – Nº 0 Ibero American titles</p>	
Total: 87	Total: 45	Total: 0
GRAND TOTAL: 132		

Source: *Obitel U.S.*

*These are Netflix, HBO and Amazon productions, which means they are US productions but made in Latin America¹

1 It is important to underscore that from the 45 titles premiered as Ibero American productions, 35 titles were from U.S. investment, such as 25 from Netflix, 4 from HBO, and 6 from Amazon. Only 8 titles were productions entirely from Ibero America. If we take into account copy rights, then 122 from the 132 reported productions.

The biggest television markets lead the number of titles coming from Ibero America, with Spain, Brazil, Mexico and Colombia in the first place. Many of these productions are also a result of the investment of U.S. SVOD platforms, as an extension which can be use in the U.S. domestic market for the Hispanic population. The consequence of this specific strategy has been the lack of English or Spanish language productions from VOD platforms that aligned to the realities of the Latina/o population in the U.S.

Table 7. VoD premiere fiction in 2020: countries of origin

Country	Titles	%
NATIONAL (total)	87	65.9
OBITEL COUNTRIES (total)	45	34.1
Argentina	3	2.2
Brazil	8	6.1
Chile	1	0.8
Colombia	6	4.5
Spain	15	11.4
U.S.	87	65.9
Mexico	8	9.1
Peru	0	0.0
Portugal	0	0.0
Uruguay	0	0.0
Venezuela	0	0.0
COPRODUCTIONS (total)	35	26.5
Coproductions U.S. **	35	26.5
Coproductions among OBITEL countries	0	0.0
TOTAL GENERAL	124	100.0

Source: Obitel U.S.

In the field of SVOD fiction, there is a clear dominance of national productions, from the U.S., in this case, both in English and in Spanish, with a release of 87 premiere titles which represents the 65.9% of the total titles.³ From *Obitel* countries, Spain is the main provider of fiction to SVOD platforms, followed by Mexico, Brazil and Colombia. In 2020, Spain had 15 premiere titles which represented 11.4% of the total. Followed by Mexico with 12 titles, and Brazil with 8 titles.

4. Fiction and audiences' participation in digital environments⁴

In 2020, social media became more important with the arrival of the pandemic caused by Covid-19, given that in-person conversations, movie going, or the famous water cooler chats -when people speak at the office about what happened in a popular series at the moment- were not possible anymore. Because of the state of the pandemic, connecting with audiences through social media became indispensable.

Having a strong presence in social media became an imperious necessity, thus, is in this context that is interesting to analyze people's answers to the promotion that was given to the telenovela *100 Días para Enamorarnos*. Telemundo published in social media clip-videos between thirty to sixty seconds, about what happened in the last episode, and about what will happen in the next episode; as well as interviews with the talent and clips behind the

3 If we consider the titles produced in Ibero America by US corporations, then we are actually talking about 121 titles, which represents the 93.7% of the titles with American copyrights.

4 This section was possible thanks to the collaboration of Erick Muñoz, a graduate from the Radio, Television and Film Academic Department at the Communication School at the University of Texas at Austin.

scenes. For that purpose, the network created specific accounts in Facebook, Instagram and Twitter to share information about the telenovela. However, the telenovela was in production and had to slow the process due to Covid-19, creating an interesting contrast between the comments made by the audience in pre-pandemic times, and the ones made during the pandemic. There were negative comments in relation to the production, mostly when it comes of how the production suffered a quality decline due to the hygiene and prevention measures established by the studios to keep the production going. I will talk a little bit more about this in the final part of the chapter in section 6 which is dedicated to the pandemic as The Theme of the Year.

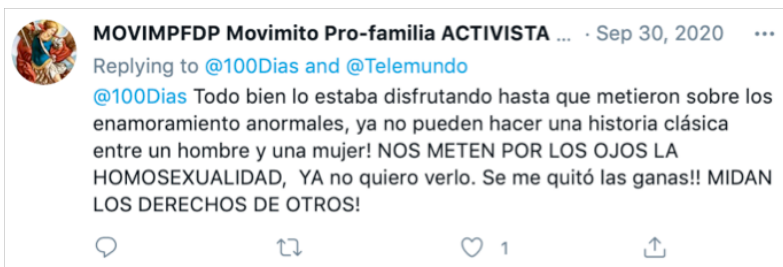
The telenovela unleashed interesting conversations in the context of the very positive reception that Ale and his transition to Alex (performed by Macarena García), a transgender teenager which developed a romance with a girl named Lucía (performed by Fernanda Urdapilleta). If your only contact with the telenovela were social media, you would think that Lucía and Alex were the leading characters, because their romance inundated social media, but in reality, they were only secondary characters from the story. Several Facebook groups were totally dedicated to which was de-nominated as #Luciale or #Lucialex.



“*Luciale Shippers*” has 10,000 followers in Facebook, while “*Lucia & Alex – Luciale*” had more than 150,000. This without mentioning the dozens of Instagram accounts dedicated to them, and the more than 10,000 posts under the hashtag #lucialex, los Tik-Toks talking about their romance, and even the series of short stories from fan fiction in Wattpad written by Alexxz_warrior titled “*Luciale <3 Lucialex*” which have been read more than 131 thousand times.



But the Lucialex content have also brought some controversy in social media, there have been some hate tweets, such as:



Even in Facebook, the most popular video on the *100 Días Para Enamorarnos* page was an interview with the actress that performs the character of Alex talking about the transition for this character. This video, while writing this book chapter, had 1.8 million views, more than 54 thousand reactions, and about 700 comments. This is extraordinary, considering that most of the videos in this page have about 20 thousand views. So, it is important to point out that *100 Días para Enamorarnos* explored in social consciousness and innovative themes that were supported by fans, which also gave visibility to the telenovela and the plot through the hashtag #Lucialex. It is important to remember that this is not the first time that Telemundo touch on issues of gender affirmation and transgender identities. In 2017, the network broadcast *Sangre de mi Tierra*, a telenovela in which there was a transgender girl, and the painful process that the character went thought for her acceptance in the context of a patriarchal and *machista* family.

5. Highlights of the year

The most important event of the year it was not fictional but real, with a huge impact that television had for the population. The sum of three social phenomena created a combination without precedents in a year as no other in recent history. In 2020, Covid-19 became a global pandemic which in the Unites States took the lives of more than half of a million Americans. To the pandemic was added the battle for the White House with a highly divisive presidential election. In this context and the complex social reality, the electoral contest between Donald Trump from the Republican

Party, and the contender Joe Biden from the Democratic Party was conceived as an existential battle for the American people. From the beginning, the strategy from the Trump administration was to minimize the pandemic, and the message was anti-immigrant, antisocial minorities, anti-sexual diversity, and anti-transgender identities. The electoral battle was impacted by the visibility and increase of African American males' deaths at the hands of the police, which unleashed a wide national protest. The claim against police brutality was exacerbated by the killing of George Floyd at the hands of the police, which gave an impulse to the already existing movement *Black Lives Matter* with massive demonstrations across the nation.

In this context, the television networks reacted by extending their news coverage, special programs and social campaigns, as it was the case of Univision, with different news slots covering the Covid-19 pandemic, but also with a close following of the electoral campaigns with *Vota Conmigo*, and *Destino 2020*. In this domain of the social campaigns, the network launched the series *ActivitaZ* targeting to the Z Generation, and the documentaries *Esencial, pero Deportable* and *DACA: un Paso Más*. On the other hand, Telemundo had a wide coverage on Covid-19 in different news slots, and other in the domain of the presidential elections' coverage. Programs such as *Radar 2020*, *Decisión 2020*, *Latinas en Lucha por el Sufragio Femenino*, among others. In the context of social campaigns, Telemundo launched programs such as *En Memoria de George Floyd*, which reflected the high relevance that the social protests had taken across the country.

6. The theme of the year: fiction in the times of a pandemic

In 2020 there were at least 360.000 deaths and 20 million confirmed cases of Covid-19 in the United States, which is the highest number of deaths and infected cases of Covid-19 registered in the whole planet. However, Covid-19 did not affect equally all the different social classes, nor ethnic and racial groups. At first the most affected were the older, in particular, the older population living in home shelters and asylums. Then, the virus showed its highest deadly effect within the Latinx and African American populations. Two combined factors had a key role in the disproportionate way in which both social minorities were affected by Covid-19. First, the precarious situation of access to health and food services, which provided unfavorable medical conditions, such as high cholesterol, hypertension, respiratory problems and cardiovascular complications as key factors against the changes to survive the Covid-19 infection. This combined with the fact that Latinx and African Americans constituted in a disproportionate number what is consider the “essential workforce” because of their high numbers of participation in the service sectors such as transportation, health services, sanitary and cleaning services, police and security, food services, etcetera, which prevent them to stop working and made them more exposed to possible contagion.

a. Ways to face the challenges in national broadcasting television

The impact that Covid had in the United States can be illustrated in the way that the television networks modify their programming strategies to accommodate to the restrictions

imposed to production, and lack of access to original content. In this context, Telemundo had to change its programming calendar, delaying some of the expected premiere titles and bringing famous telenovelas as rerun in prime time. Before the scarcity of original content and delays, the network decided that instead of launching *Enemigo Íntimo 2*, when *Operación Pacífico* ended, they decided to schedule a special edition of *La Reina del Sur 2*, and in the promotional material, the network promise that the new remastered version will have unpublished scenes for the pleasure of the fans of this telenovela.

A way to face the lack of new titles was through the combined strategy of reruns and repetitions. The programming lineup did not show a significative higher number of rerun/repetition titles in 2020 in contrast to 2019, but the difference came from the number of hours given to these rerun/repetition titles, having a compensation effect in the programming lineup. It is so, despite the fact that in 2019 there were 50 rerun titles, they only represented around 4,534 hours; while in 2020, with only 28 titles they represented around 5,076 hours, which represented an increase of 500 hours in spite of the decrease on the number of titles.

Another important strategy has been the increase on the number of hours on Turkish telenovelas scheduled in the three main distributors of fictional content in prime-time in the U.S. Hispanic television market: Univision, UniMás, and Telemundo. It is so that in spite of that the networks scheduled almost the same number of titles of Turkish fiction, 4 in 2019, and 5 in 2020, in relation to hours, this meant 330 hours in 2019, in contrast to 617 hours in 2020, what is almost the double amount of airtime.

b. *Protocols and strategies for the return of fictional production in broadcasting television*

The isolation and confinement policies, triggered by the pandemic, affected directly television production in the United States. In March 2020, the productions of Netflix, Amazon, Disney, Warner Bros, AppleTV, NBC, CBS, Fox, ABC were totally stopped. Around 97 television series and 21 pilots stopped their production. The Spanish language networks in the United States also saw their operations affected by the pandemic. In March 14th the television networks ordered their “non-essential personal” to work from home. Univision closed its offices in Newport, in Miami, and moved its operations to its office at Doral, Miami. Particularly, the talent working in live television productions was considered by Telemundo as essential personal, and under this scheme, several television anchors tested positive to Covid-19.

When it comes to fictional production, the studios stopped their operations in Miami. Telemundo launched a notice of suspension of activities in Miami and Mexico on March 17th. The filming of *100 Días para Enamorarnos* and *Falsa Identidad 2*, produced by Argos in Mexico were stopped. On the other hand, Univision does not produce fiction in the United States, but it gets its fictional content produced in Mexico by Televisa. The Mexican television corporation did not stop production, by implementing specific protocols of hygiene and sanitation.

It was until June 2020, that in the United States, an agreement between unions and major studios was reached on the deployment of specific policies for production. From the very first day, the personal is subjected to laboratory rapid tests which should be PCR (Polimerasa Chained Reaction). This is followed

by a system of well-defined A, B, C and D zones to create specific flows and barriers of access based on the necessary proximity to the cast, the level of testing, and the degree of physical distant that should be observed. Zone A includes the talent -who cannot use protective equipment nor to have social distance while filming a scene- as well as the personal that interacts with the cast. This zone requires Covid-19 tests at least 3 times a week. The rest of the personal, which can use protective gear and follow social distance all the time, they are divided in three different zones. Zone B is integrated by the personnel that works in the set, but not when the cast is present without protective equipment, and they also required tests at least once a week. Zone C, includes the personnel that work in other areas, which are not the production set, and they required tests at least every other week. Zone D is for the personnel that works remotely, but they do it in the environment of the production and require a PCR test at the day of their hiring. All the productions have a designated supervisor which oversees that all the Covid-19 security protocols are followed. If an employee tests positive to Covid-19, the employee has to received 10 paid days for sickness, and get isolated. They only can return to work when authorized, and following the medical protocols (Balderston, 2020).

However, when the activities of production started again, there were some cases of talent testing positive to Covid-19. Luis Francisco Franco a protagonist of *Falsa Identidad* tested positive for Covid-19, and the production did not stop, but looked to advance in scenes that did not involve his character. Ylsa Salas, a protagonist from *100 Dias para Enamorarnos* also tested positive for Covid-19 in the context of the summer production activities.

c. Experiences on specific national fictional production in the context of the pandemic

One of the fictions that most clearly showed the effects that the pandemic brought to television was Telemundo's production *100 Dias para Enamorarnos*. This is a remake from the Argentinean telenovela under the same name which was produced by Underground (owned by NBC-Telemundo) for Telefe (owned by Viacom). It is important to remember that Underground is an Argentinean independent production house, launched in 2006 by Sebastian Ortega and Pedro Cullel, but it was acquired by NBC-Telemundo and became a subsidiary of Telemundo Global Studios with operations in Argentina. For its part, Telefe, one of the two main broadcasting television networks in Argentina was acquired by Viacom-CBS. Is important to remember that Viacom-CBS is also the owners of Chilevision in Chile.

The original production in Argentina had 125 episodes. The remake of Telemundo, in dramedy style, started the production in 2019, and the filming kept going during 2020. With the premiere of the telenovela announced for April 28th, the production process was just in the middle when the pandemic hit, affecting all aspects of life, forcing the team to stop the production on March 18th, 2020, even though the production was already around the 57 episodes, but there were still some missed scenes from the 50th to the 57th episodes. Before the impossibility to record these scenes at the set, the team continued its work, but in the field of postproduction, in which they tried to filled out all the gaps, and to create a narrative that seems coherent for the viewer. However, audiences

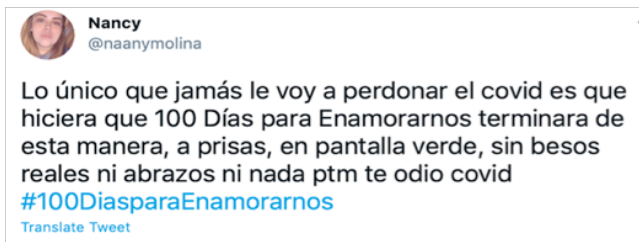
started to express their surprise and complains through social media, because of the interruption of several line narratives within the plot, and because of the incongruence of some sequences. The premature ending, given at June 20 with only 57 episodes, and only with 50 days into the lineal temporality of the fictional narrative, which means the telenovela was only half way through the plot, from the 100 days promised by the title. With a series of narrative threats pending, or inconclusive, the telenovela ended, but with the tacit announcement from its talent/characters through social media that it will continue.

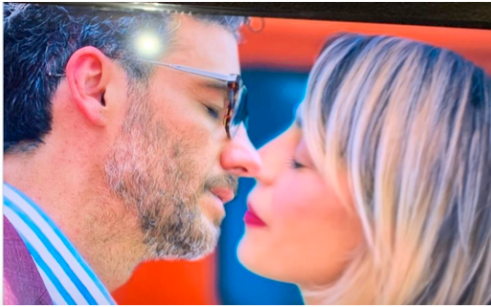
The press announced the restarting of the telenovela production in July, with later reports that Ylse Salas tested positive for Covid-19 during the production, but with a clear imprecision of when she actually tested positive. Talent used social media to share pics and images about the way the production had to deal with the security and sanitary policies on the set. Nevertheless, in the context of the reboot of the production for the second season in 2020, Mariana Trevino, who performs as one of the main characters, refused to be present in the filming set because of fear of getting Covid-19. Instead, Mariana recorded her scenes from her house. Using the green screen technology, Mariana was able to be incorporated to the audiovisual sequence, by choreographing her postures and axes of action, and the direction of her gaze within the frame, accordingly with the position in the space of her scene partners. While in person, the production team used another actress who was always giving her back to the camera, in order to be able to situate spatially the movements and the dynamic on the scene.

In social media, there were complaints about scenes in which, clearly, the actor where not present in the same room, as well as the lack of passion in some of the sequences, due to the impossibility to have physical interaction between the actors. In some cases, screen shots were shared in social media about the way in which a kiss between the main characters was poorly staged. The screen shot revealed how a kiss was made through green screen with the actors in different places.



Many viewers started following the telenovela when it arrived to Netflix, but they found a drastic change of quality between what was presented in the first season and the second season (or what may be considered the episodes post-pandemic), and too many commented that it would have been better to wait, in order to have the resources to produce “correctly” the telenovela.





d. Digital platforms: growth, downloads and fictional programming

In April, press reports gave initial data showing that Covid-19 gave to television a boom, from which Telemundo and Univision were the main television network beneficiaries. But also, there was an increase on the activity in the digital platforms from these networks. In October 2020, a study revealed that 60% of U.S. Hispanic population increased their consumption of television content in streaming during Covid-19 times, spending from three to five hours more than usual, and the 71% reported being watching more television programs. The pandemic also generated an important consumption of VOD content. The subscription of SVOD showed record numbers in 2020, but also the services on transactional on demand (TVOD), and the support of advertisement (AVOD) also achieved important increases.

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7

**MEXICO: BETWEEN THE PANDEMIC, THE MELODRAMA AND
THE INCREASE OF THE VoD SYSTEMS.**

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Introduction

At the Latin American level, México was one of the most affected countries by the pandemic that caused the coronavirus and its illness, COVID-19, by registering more than 2 million positive cases and more than 206 thousand deaths¹.

Therefore, millions of Mexicans found themselves from a day to another, homebound, 24 hours a day. Many had to leave their houses

1 Cut to April 8th, 2021. Source: Secretariat of Health (Secretaría de Salud), Mexico.

to work, but others had to remain at home. This implied such a challenge for the families, their coexisting dynamic changed, their routines and the interaction between each other.

One of the dynamics that many families had was watching broadcast television and streaming content. The closure of activities and the obligation for all to remain at home, somehow forced people to consume more content, not only of broadcast television, but also from VoD platforms. Some data indicate that more than six million people watched the Canal de las Estrellas (Televisa) in prime time, same how, the SVoD services have been in greater demand during the pandemic, having a doubled annual growth rate in subscriptions, from 9,0% to 18,2%.

The audiovisual content production industry faced major challenges in order to be able to transmit and produce products; the drop in the advertising revenue affected the productions budget. The TV networks, as well as the OTT companies, faced the challenge of retaining audiences and gain subscribers, and be able to have a wide catalog.

On the other hand, by being confined to their homes, millions of people were able to consume contents through SVoD on multiple devices and at different times, when and where they wanted. Without a doubt, the Covid-19 pandemic is marked by the use and consumption of more technology and digital content, but also, by a major growth of television.

Part of this broadcast television viewing increase was due to the fact that face-to-face classes not only changed to be online, but also televised, as the Mexican Government signed on August 3rd, 2020, an agreement with Televisa, TV Azteca, Grupo Imagen and Grupo Multimedios in order to support the Back to School Plan 2020-2021 (Plan

de Regreso a Clases del Ciclo Escolar 2020-2021), by facilitating the transmission of the television program “Learn at Home (I-II)” (Aprende en Casa I y II), which was aimed at 30 million students of 16 scholar grades of the basic education system (preschool, elementary and junior high), who took classes through television lessons. This agreement, which initially assured being of goodwill, implied an expense of 450 million pesos only for the period from August 24 to December 18, 2020, and this was only for the transmission of the 1.550 contents that were generated.

In August of 2020, Canal Once launched the bidding for the production of educational content for the Secretariat of Public Education (Secretaría de Educación Pública, SEP), which was considered the largest bidding process ever launched by that channel. The bidding was released in 17 days. The winning company should be able to operate services for 900 to 2.300 people, transfer 2.240 people, two production forums of their own and 150 technicians, to change shifts every eight hours. Finally, Canal 11 hired, for 51.5 million pesos, nine companies for the “Learn at Home II” (Aprende en Casa II) program.

On a commercial level and due to the pandemic, Televisa launched the #TelevisaAccompaniesYou (#TelevisaTeAcompaña) strategy in its different businesses with special programming about Covid-19, in order to be transmitted through broadcast and cable TV (Izzy and Sky). The campaign “Beware of the Coronavirus” (*Mucho Ojo con el Coronavirus*) was added to this strategy, broadcasting information on health, hygiene and preventive measures.

Information that, likewise, was taken in some national fictions such as *La Rosa de Guadalupe* (The Rose of Guadalupe), which was one of the only productions along with *Como dice el Dicho* (As the

saying goes) (both of Televisa) that in an open way, took the pandemic as part of their narrative plot.

1. The audiovisual context of Mexico in 2020

1.1. The broadcast television in Mexico

Chart 1. National broadcast television networks/channels in Mexico.

Private broadcast / channel (9)	Public broadcast / channel (4)
Televisa (Channels 2, 5, 9 and Foro TV)	Once TV (Channel 11 and 11.1)
TV Azteca (Channels 1, 7, ADN40 and A+)	Conaculta (Channel 22)
Imagen Televisión (Channel 3)	Canal 14 (Channel 14)
NETWORKS TOTAL = 6	
CHANNELS TOTAL = 13	

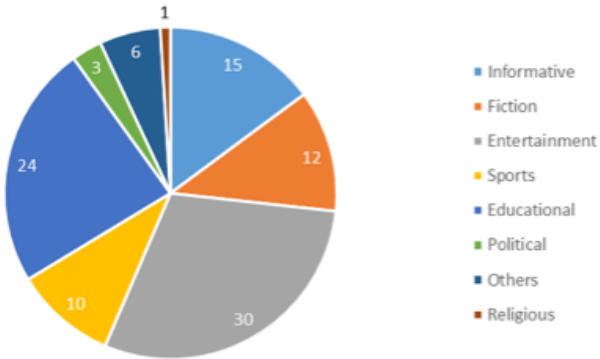
Source: Obitel Mexico.

Even though it had been announced that the alternation in the federal government would imply a democratization in the national broadcast television, the biddings for a fourth national channel that had been deserted in 2015 have not been launched nor replaced; what has been established in a better way, is the use of the mirror channels of the existing television networks; it was through the mirror signals of Televisa, TV Azteca and Grupo Imagen that the classes of the “Learn at Home” (*Aprende en Casa*) program, were transmitted; the only

public national TV network that did broadcast school classes were Canal Once, Canal 14 and Canal 22.

Graph 2: Genres and hours broadcast in TV programming²

Broadcast genres	hours	%
Informative	21657	15
Fiction	18310	12
Entertainment	44040	30
Sports	15524	10
Educational	35460	24
Political	3980	3
Others	8768	6
Religious	550	1
TOTAL	148289	100



Source: *Obitel Mexico*.

2 Graph 1 was not carried out due to lack of information.

One element to highlight is that this year the number of hours of educational content increased due to the agreement that the Mexican Government made with the national commercial networks (Televisa, TV Azteca and Imagen) in order to use their mirror channels for broadcasting the classes that had to be given in the Mexican basic education system through television, due to the COVID-19 pandemic that had suspended face-to-face classes.

1.2. Pay TV and VoD platforms in Mexico

Chart 2. Pay TV Networks in Mexico

Most viewed Pay TV Networks in 2020
1) SKY, 2) Totalplay, 3) Megacable, 4) Izzi, 5) Cablecom, 6) Axtel, 7) Dish, 8) Gigacable
TOTAL: 8 subscription television networks

Source: Obitel Mexico.

The impregnation of Broadband internet, together with the multiple offer of OTT's services worldwide, led to a significant drop in the subscribers to pay television services. This, coupled with the pandemic, caused furthermore the subscribers' loss. Nevertheless, in Mexico, subscribers to these pay television services increased 6,7% during 2020.

To companies that offer pay TV content, it's been useful to sell packages that offer satellite or cable TV content, plus broadband internet and telephony. Being the companies of Grupo Televisa (Sky, Izzi)

the ones with the highest insertion (64,7%); followed by Megacable (15,9%), Dish-MVS (12,3%) and Total Play 5,3%³.

Chart 3. VoD in Mexico

Top active VoD platforms in 2020	Total
Netflix (Netflix), Disney+ (Disney) Dish Móvil (Dish), Amazon Prime (Amazon), Movistar+ (Telefónica) Blim (Televisa), Apple TV (Apple) Cinépolis Klic (Cinépolis), Claro- Video (Claro Video), HBO Go (HBO) Pluto TV (Viacom CBS), Paramount+ (Paramount Picture), Acorn-TV Crunchyroll, Curiosity stream Fox Premium, Fox play, Tubi	18
TOTAL	18

Source: *Obitel Mexico*.

1.3. Independent television fiction production companies

In Mexico, independent production companies are very important pieces for VoD platforms and television networks. In recent years their productions have been successes on SVoD platforms and, without a doubt, their participation is on the rise. We found that in 2020 the most active production companies were: Noc Noc Cinema, which produced *La Casa de las Flores (third season)* for Netflix; Lemon Studios, which in 2020 made the *Control Z* series. BTF media has produced for Disney, TV Azteca, Netflix, Amazon Prime, Net Geo, among

3 December 2019 data provided by Statista: <https://es.statista.com/estadisticas/984810/distribucion-por-proveedor-del-mercado-de-television-por-cable-mexico/>

others. Within their most recent productions is *Maradona “Sueño Bendito”*, which is to air in late 2021.

On the other hand, the production company Argos Comunicación (led by Epigmenio Ibarra) has collaborated with TV Azteca, Telemundo, Netflix, Imagen Televisión, Disney Channel among other networks (its productions include *Ingobernable*, *El Señor de los Cielos*, etc.). According to their CEO, Epigmenio Ibarra, the company has taken off, gaining a more global vision, as well as a better use of a universal language in their productions. In this production company, they increasingly use *big data* in order to build stories, known as *data-oriented content*⁴. The production made this year was *Oscuro Deseo*, for Netflix. For its part, Estudios Teleméxico (from Fox TeleColombia) made *Promesas de Campaña* for Claro-Video. While Caponeto produced *Desenfrenadas* for Netflix.

1.4. Financing sources for the audiovisual sector

2020 was not a good year for TV networks, as the pandemic also affected their advertising revenue. In other years reports, we have repeatedly said that advertising revenues have been declining each year. In the first nine months of 2020, Televisa and TV Azteca lost 8,122.7 million pesos (about 400 million dollars). Without a doubt, the most important private companies in Mexico are losing publicity against digital platforms. Another reason for this decline is the cut in the government budget, due to official advertising, and the fall of advertisers as a result of the global pandemic.

With an enormous growth, streaming platforms are in different circumstances. According to Forbes, Netflix added 15.8 million users in 2020, when in 2019 we reported 6 million 783 thousand active

4 Tele Mexico Studios.

accounts. Meaning that, during the pandemic, their subscriptions have increased more than one hundred percent.

1.5. Communication policies

As a government strategy, teaching through television channels returned during the pandemic, as pointed out at the beginning of this chapter, due to Covid-19. On August 3, 2020, given the increase in cases and the risk involved in face-to-face classes, President López Obrador announced that the educational system would be remote, through four private television networks in order to reach more than 30 million of students at the basic levels. For achieving this, an agreement was signed by the Secretary of Public Education and the television networks. The broadcasts were seven days a week. For this transmission, the government paid 450 million pesos (22 million dollars) to the networks.

The pandemic escalation on 2021's first semester forced the government to create "Learn at Home III" (*Aprende en Casa III*), which is now being carried out by *Altán Redes* -a Mexican company responsible for designing, deploying, operating and marketing the Red Compartida (the Shared Network), the Red para Todos (the Network for Everyone) (State network that provides telecommunications services)-, and that still has the support of Canal Once for content formulation, as well as the support of the television networks for transmission and retransmission.

1.6. Digital and mobile connectivity infrastructure

According to data from the 2020 Population and Housing Census (*Censo de Población y Vivienda*, INEGI, 2020), Mexico has a population over 126 million people, the average age being 29 years.

In other words, Mexico continues to be a country with a young population. Between 2010 (when the previous Census was applied in the country) and 2020, in Mexico, cellphones availability *at homes* grew from 65,1% to 87,5%. Internet in households grew from 21,3 to 51,3%, telephone landlines decreased from 43,2% to 37,5%. As we can observe in these data, the internet has been growing in homes, as well as cell phones, while landline telephony is declining. Television continues to be a very important medium at home. Between 2010 and 2020, the availability of TV dropped only 2 points (from 92,6% to 91,1%), and 43% of homes have Pay TV. According to data released in this Census, there is a large digital divide between Mexico City (such as owning a computer) and other states (at the southeast region of the nation). This, as a result of the vivid inequalities that have prevailed in the country for decades. The internet insertion in the country by 2020 is of 80.6% million people, with rural populations having the least access to internet, and even more than 40 million Mexicans without access to it.

2. Analysis of 2020: National and Ibero-American Premiere Fiction on Broadcast TV

Table 1. Fictions exhibited in 2020 (national and imported; premiere, reruns and co-productions)

NATIONAL UNPUBLISHED TITLES – 13

Televisa - 11 national titles

1. *Vencer el miedo* (Series)
2. *Rubí* (Series)
3. *Te doy la Vida* (Telenovela)
4. *La Mexicana y el Güero* (Telenovela)
5. *Imperio de mentiras* (Telenovela)
6. *Quererlo todo* (Telenovela)
7. *Como dice el Dicho 7* (Unitary Drama)
8. *La Rosa de Guadalupe 13* (Unitary Drama)

9. *El Dragón: el regreso del guerrero* (Series)
10. *Esta Historia me Suena 2* (Series)
11. *Vencer el Desamor* (Telenovela)

TV Azteca – 2 national titles

12. *La Bandida 2* (Series)
13. *Lo que Callamos las Mujeres* (Dramatization)

Imagen TV– 0 national titles

Canal Once– 0 national titles

Canal 22– 0 national titles

COPRODUCTIONS– 0

OBITEL FOREIGN UNPUBLISHED TITLES – 8

Televisa – 6 titles

14. *Preso No. 1* (Series- USA)
15. *El final del paraíso* (Telenovela – Colombia/USA).
16. *La Esclava Blanca* (Series- Brazil)
17. *Jesús* (Telenovela -Brazil)
18. *Betty en NY* (Series - Colombia/USA).
19. *Sin senos sí hay paraíso* (Telenovela- Colombia/USA).

Imagen TV– 1 title

20. *Dulce ambición* (Telenovela -Brazil)

Canal 22 – 1 title

21. *El tiempo entre costuras* (Series – Spain)

NON OBITEL FOREIGN UNPUBLISHED TITLES - 4

Imagen TV– 4 Non OBITEL foreign unpublished titles

22. *Pecado original* (Telenovela - Turkey).
23. *Omer sueños robados* (Series – Turkey).
24. *Mar negro* (Telenovela - Turkey)
25. *Tierra Amarga* (Telenovela - Turkey)

RERUNS TITLES- 9**Televisa - 9 national titles**

26. *Mañana es para Siempre* (Telenovela -Mexico)
27. *Soy tu Dueña* (Telenovela -Mexico)
28. *Corazón Indomable* (Telenovela -Mexico)
29. *Destilando Amor* (Telenovela -Mexico)
30. *La que no Podía Amar* (Telenovela -Mexico)
31. *Hoy voy a Cambiar* (Telenovela -Mexico)
32. *Silvia Pinal, Frente a Ti* (Series -Mexico)
33. *Que Pobres tan Ricos* (Telenovela -Mexico)
34. *Corona de Lágrimas* (Telenovela -Mexico)
35. *La Rosa de Guadalupe* (Unitary Drama- Televisa)

UNPUBLISHED NATIONAL TITLES TOTAL: 13**OBITEL UNPUBLISHED TITLES TOTAL: 8****UNPUBLISHED TITLES (NATIONAL AND**

Unlike 2019, in 2020, ten fewer titles were released; the reason is the temporary and/or definitive suspension of the production of diverse fictions that chose to resume the recordings until there were more favorable conditions in order to avoid COVID-19 contagion between the cast and the production.

This caused that, more than in other years, there were several reruns of titles that had already been released; this strategy of placing fictions on the screen was profitable in terms of rating, since titles such as: *La que no Podía Amar* (2011), *Soy tu Dueña* (2010) and *Destilando Amor* (2007) -these last-mentioned were starred by the former Mexican first lady, the actress Angélica Rivera- were placed among the five most viewed fictions in 2020, displacing the premiere titles, despite being broadcast on a non-prime time.

Table 2. The Premiere Fiction in 2020: countries of origin

Country	Titles	%	Chapters/ Episodes	%	Hours	%
NATIONAL (total)	13	62,0	921	51,0	906:20:00	51,0
OBITEL COUNTRIES (total)	8	38,0	892	49,9	884:00:00	49,0
Argentina	0	0,0	0	0,0	0:00:00	0,0
Brazil	3	14,0	463	52,0	459:30:00	52,0
Chile	0	0,0	0	0,0	0:00:00	0,0
Colombia	3	14,0	374	42,0	371:00:00	42,0
Spain	1	5,0	11	1,0	10:20:00	1,0
U.S.A (Hispanic production)	1	5,0	44	5,0	43:50:00	5,0
Mexico*	13	62,0	921	5,0	906:20:00	51,0
Peru	0	0,0	0	0,0	0:00:00	0,0
Portugal	0	0,0	0	0,0	0:00:00	0,0
Uruguay	0	0,0	0	0,0	0:00:00	0,0
Venezuela	0	0,0	0	0,0	0:00:00	0,0
COPRODUCTIONS (total)	0	0,0	0	0,0	0:00:00	0,0
Mexican coproduction **	0	0,0	0	0,0	0:00:00	0,0
OBITEL Countries coproduction	0	0,0	0	0,0	0:00:00	0,0
GRAND TOTAL	21	100,0	1,813	100,0	1,790:20:00	100,0

Source: *Obitel Mexico*.

Due to the drop in titles due to the pandemic, this year the number of episodes and hours of national premiere fiction was reduced, but this was not the case for Ibero-American premiere fiction that this year increased its hours on screen, almost to double compared to 2019.

In 2020, there were no co-productions registered between Mexico and some other Obitel countries.

Table 3. National and Ibero-American fiction formats

Format	Nationals						Ibero-American					
	Titles	%	C/E	%	H	%	Titles	%	C/E	%	H	%
Telenovela	5	38,4	430	47,0	426:00:00	47,0	4	50,0	652	73,1	646:10:00	73,0
Series	5	38,4	255	28,0	249:20:00	27,4	4	50,0	240	26,9	238:00:00	27,0
Mini-series	0	0,0	0	0,0	0:00:00	0,0	0	0,0	0	0,0	0:00:00	0,0
Telefilm	0	0,0	0	0,0	0:00:00	0,0	0	0,0	0	0,0	0:00:00	0,0
Unitary	3	23,0	236	25,0	231:00:00	25,6	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	0	0,0	0	0,0	0:00:00	0,0	0	0,0	0	0,0	0:00:00	0,0
Total	13	100,0	921	100,0	906:20:00	100,0	8	100,0	892	100,0	884:10:00	100,0

Obitel Elaboration with national data provided by Nielsen Ibope México, S.A. de C.V. Software MSS TV, Base “Regular Rating 5 domains + Dish. Total television programming during 2020.

Regarding the format, in 2020, the series production remained on the rise in both national and Ibero-American titles; although, in the case of nationals, there is still a wide consumption of the unitary dramatization *La Rosa de Guadalupe* and *Como Dice el Dicho*; both were among the five most viewed fictions in the year.

It is also noteworthy, the drastic decrease in the hours produced of telenovelas for 2020, since in 2019 there were 750 hours, while for 2020 were 249 hours, that is, 66% less. The reason for this is that several of the productions had to stop their recordings as a result of the pandemic, which in the long run it also implied a reduction in their episodes, which also reduced the number of broadcast hours.

Table 4. The ten most watched titles on broadcast television⁵

	Title	Channel	Production company	Format/ Genre	Chap./ eps.No. (2020)	Time slot	Rating	Share
1	<i>Te doy la Vida</i>	Canal 2	Televisa	Telenovela	81	Afternoon	18,94	29,62
2	<i>Rubí</i>	Canal 2	Televisa	Series	27	Prime	17,71	25,73
3	<i>La Rosa de Guadalupe 13 Vencer el Miedo</i>	Canal 2	Televisa	Unitary	88	Afternoon	17,60	26,86
4	<i>Como Dice el Dicho</i>	Canal 2	Televisa	Series	46	Afternoon	16,51	27,63
5	<i>El Dragón: el Regreso de un Guerrero</i>	Canal 2	Televisa	Unitary	155	Afternoon	16,22	27,88
6	<i>Vencer el Desamor</i>	Canal 2	Televisa	Series	82	Prime	15,42	23,26
7	<i>Quererlo todo</i>	Canal 2	Televisa	Telenovela	93	Afternoon	14,10	20,99
8	<i>Esta Historia me Suena 2</i>	Canal 2	Televisa	Telenovela	39	Afternoon	13,98	28,13
9	<i>La Mexicana y el Güero</i>	Canal 2	Televisa	Unitary	38	Afternoon	13,14	22,21
10		Canal 2	Televisa	Telenovela	126	Prime	12,36	18,89

Obitel Elaboration with national data provided by Nielsen Ibope México, S.A. de C.V. Software MSS TV, Base "Regular Rating 5 domains + Dish. Total television programming during 2020.

It is to highlight that in 2020 the ratings increased on regard to 2019, the year in which the most viewed fiction reached 18,94 points; this implies an increase near to one point in relation to 2019, which stands out, since the trend was, on average, a decrease from one to two rating points per year.

This year, unlike the previous three, *La Rosa de Guadalupe* was not the most watched fiction, although it did come in third place;

⁵ The ten most viewed titles refer only to those fictions that were released in 2020, so this top ten cannot coincide with the ten most viewed fictions during 2020 on national broadcast television.

however, regarding to the preference for unitary dramatization, a new production is added: *Esta historia me suena*, focusing on youth problems and developing them through a song. This format is similar to the fiction *La vida es una canción*, a unitary produced by TV Azteca in 2004. Also, it should be recognized the unitary program *Como dice el Dicho*, which is gaining audience; this program is produced by Televisa.

The most watched fiction in 2020 was *Te doy la vida*, whose main plot revolves around the leukemia diagnosis in a child, for whom the only alternative is the bone marrow donation of his biological father, who does not know him, and the love story between his biological father and his adoptive mother; this was an adaptation of a Chilean title with the same name. In Mexico it was the telenovela with the highest rating this year, broadcast in the afternoon hours, not in *prime time*, as it was the trend.

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

	Titles	Channel	Gender Rating %		Socioeconomic level %		
			Women	Men	AB	C	DE
1	<i>Te doy la Vida</i>	Canal 2	10,8	7,4	10,3	19,5	26,7
2	<i>Rubí</i>	Canal 2	10,7	6,0	10,5	18,7	25,0
3	<i>La Rosa de Guadalupe 13</i>	Canal 2	10,2	5,4	9,3	17,6	29,0
4	<i>Vencer el Miedo</i>	Canal 2	9,5	5,1	8,9	16,5	24,7
5	<i>Como dice el Dicho</i>	Canal 2	9,47	5,1	9,8	15,9	25,1
6	<i>El Dragón: el Regreso de un guerrero</i>	Canal 2	8,4	5,6	8,5	16,0	22,3
7	<i>Vencer el Desamor</i>	Canal 2	9,1	4,9	7,8	15,9	23,5
8	<i>Quererlo Todo</i>	Canal 2	8,2	4,0	7,7	15,6	20,6
9	<i>Esta Historia me Suena 2</i>	Canal 2	7,5	4,0	7,4	10,7	20,9
10	<i>La Mexicana y el Güero</i>	Canal 2	7,8	4,4	7,0	11,8	23,1

Titles		Channel	Age ranges %				
			4 to 12	13 to 18	19 to 29	30 to 44	45 +
1	<i>Te doy la Vida</i>	Canal 2	9,0	8,9	5,5	9,6	11,5
2	<i>Rubí</i>	Canal 2	8,5	8,0	6,7	8,6	9,9
3	<i>La Rosa de Guadalupe 13</i>	Canal 2	9,1	8,6	5,8	7,8	10,2
4	<i>Vencer el Miedo</i>	Canal 2	8,1	6,7	5,3	6,8	8,6
5	<i>Como dice el Dicho</i>	Canal 2	8,5	7,4	5,7	6,6	9,4
6	<i>El dragón: el Regreso de un Guerrero</i>	Canal 2	7,1	6,1	5,0	6,8	8,9
7	<i>Vencer el Desamor</i>	Canal 2	7,2	6,8	4,9	7,0	8,9
8	<i>Quererlo Todo</i>	Canal 2	6,5	5,4	4,5	6,1	8,3
9	<i>Esta Historia me Suena 2</i>	Canal 2	5,8	5,4	4,8	5,8	7,0
10	<i>La Mexicana y el Güero</i>	Canal 2	6,5	6,8	4,3	5,9	8,0

Obitel Elaboration with national data provided by Nielsen Ibope México, S.A. de C.V. Software MSS TV, Base "Regular Rating 5 domains + Dish. Total television programming during 2020

As a constant during the last five years, in Mexico, the fiction consumer profile is a woman over 45 years of age who belongs to the middle and lower socioeconomic status.

However, the pandemic condition that forced the population to stay at home had an impact on the fiction viewing, since all socioeconomic groups increased their audience. The highest being the DE group (with the lowest socioeconomic income), since in 2019 the program with the highest rating had 20,14; meaning, that group increased five rating points its viewing on broadcast television.

3. VoD 2020 monitoring

The pandemic had positive repercussions for the SVoD industry. As we previously reported in this document, Netflix subscriptions in Mexico grew more than one hundred percent (grew from 6 million 783 thousand accounts to 15,8 million in 2020), which has also had an improvement point with the arrival of new services, Disney Plus being the most anticipated.

3.1. VoD platform market

The much-announced Disney Plus arrival in Mexico occurred on November 17, and on its first launching day, it collapsed in some areas of the country, due to the saturation of the platform. It is considered to be a true competitor for Netflix and it can be demonstrated with the following: Mexico is the third country with the highest number of the Disney Plus APP downloads, after the United States and Brazil (2,2 million downloads during its launching month), which places it in the second SVoD platform with the highest number of subscriptions in Mexico.

The revenue generated in November 2020 by the Disney + App in Mexico were up to \$350,200 dollars⁶. In 2021, Disney is expected to make 21 productions in Mexico. On the other hand, according to The CIU data, Prime Video has 918 thousand accounts, followed by Claro-Video with 418 thousand, as well as HBO-Go, and finally is BLIM, with 234,600 accounts⁷. The launch of Star +, the Walt Disney Studios' new overture, is forecast for June 2021, and in the same

6 <https://elceo.com/tecnologia/mexico-el-tercer-pais-con-mas-descargas-de-la-app-de-disney-plus/>

7 <https://www.xataka.com.mx/streaming/disney-plus-llegara-a-mexico-prime-video-tiene-que-preocuparse-marvel-star-wars-subio-al-segundo-lugar-streaming>

month, the arrival of HBO Max. In regard to the production investments in Mexico, Netflix invested 200 million dollars in productions in Mexico and for 2021 is expected a 300 million expense.

3.2. VoD analysis in 2020: National and Ibero-American premiere fiction

In 2020, Claro-Video increased its national productions (six) in contrast to a single production that was broadcast in 2019 (the series *Claramente*). We found, in its contents, series starring by Eugenio Derbéz, who due to the pandemic had to stay at home, -as the vast majority-, and knew how to take advantage of this situation in order to produce a series from there, sharing what he and his family lived.

Claro-Video has bet on producing historical series, such as *Orgullo México*, as well as the comedy genre such *Manual para Galanes* and *Herederos por Accidente*. On its part, Netflix still prefers to produce content that addresses issues based on real events, as it did with the series *Historia de un Crimen: la búsqueda*, which story shocked a large part of the Mexican society in 2010; as well as topics that address terror content (*Diablero*), crime (*Oscuro Deseo*), and content with young protagonists: *La Casa de las Flores* (3rd. and last season) and *Desenfrenadas*. While Prime-Video seems to prefer to produce content with themes aimed at young people: *De Brutus Nada* and *Cómo sobrevivir soltero*. While Blim, this year only had one production, *40 y 20* in its fifth season.

It is estimated that in 2020 the main Video on Demand platforms (without counting in this report the arrival of Disney Plus), Netflix, Claro-Video, Blim and Prime-Video obtained profits of more than 200 million dollars.

According to a report from the Federal Institute of Telecommunications (IFT), which applied a survey to users who had OTT services, indicated that 84 percent of these are subscribed to Netflix⁸.

Action and adventure series are an important part of the overview of original digital series. Many of the biggest streaming compete in this field, with some of the most important series of this genre that boost subscriptions.

In the last months, the concurrence of Amazon Prime video series has increase from 9,5% in August to 20,8% in September 2020. Between July and September, the most demanded Amazon original series in Mexico was *The Boys* (Parrot Analytics Report).

Table 6. National and Ibero-American fictions exhibited in 2020 in VoD systems

NATIONAL RELEASED PRODUCTIONS	IBERO-AMERICAN RELEASED PRODUCTIONS	CO-PRODUCTIONS
<p>Netflix – 6 national titles</p> <ol style="list-style-type: none"> 1. <i>La Casa de las Flores (3a temporada)</i> (series). 2. <i>Control Z</i> (series). 3. <i>Diablero 2</i> (series). 4. <i>Oscuro Deseo</i> (series). 5. <i>Historia de un crimen. La búsqueda</i> (series). 6. <i>Desenfrenadas</i> (series). 	<p>Netflix – 14 Ibero-american titles</p> <ol style="list-style-type: none"> 1. <i>Elite 2</i> (series-Spain) 2. <i>Selena: La Serie</i> (series - USA). 3. <i>Las Chicas del Cable 5</i> (series -Spain). 4. <i>Alguien tiene que morir</i> (miniseries -USA). 5. <i>Altar Mar 3</i> (series -Spain). 6. <i>Valeria</i> (series -Spain). 	<p>Netflix – 0 titles</p> <p>Prime-Video- 0 titles</p> <p>Claro TV- 0 titles</p>

8 <https://www.milenio.com/negocios/ingresos-otts-netflix-1-400-mdd-mexico-2024>

NATIONAL RELEASED PRODUCTIONS	IBERO-AMERICAN RELEASED PRODUCTIONS	CO-PRODUCTIONS
<p>Claro-Video – 6 national titles</p> <ol style="list-style-type: none"> 1. <i>DesHecho en casa</i> (series) 2. <i>Orgullo México</i> (series). 3. <i>Herederos por Accidente</i> (series). 4. <i>Promesas de Campaña</i> (series). 5. <i>Manual para Galanes</i> (series). 6. <i>Reto Tokio 2020</i> (series). <p>Prime-Video- 4 national titles</p> <ol style="list-style-type: none"> 1. <i>De Brutas Nada</i> (series). 2. <i>Cómo sobrevivir soltero</i> (series). 4. <i>El Candidato</i> (series). 5. <i>Ana</i> (series) <p>Blim- 1 national title</p> <ol style="list-style-type: none"> 1. <i>40 y 20</i> (season 5) (series). 	<ol style="list-style-type: none"> 7. <i>Los favoritos de Midas</i> (series -Spain). 8. <i>El desorden que dejas</i> (series -Spain). 9. <i>100 días para Enamorarnos</i> (series - USA). 10. <i>3% 4</i> (series -Brazil). 11. <i>Reality Z</i> (series -Brazil). 12. <i>Siempre bruja</i> (series - Colombia). 13. <i>Espectros</i> (series -Brazil). 14. <i>Omnisciente</i> (series - Brazil). 15. <i>Narcos 2</i> (series-USA). <p>Prime-Video- 3 Ibero-american titles</p> <ol style="list-style-type: none"> 1. <i>Patria</i> (series-Spain). 2. <i>Caronte</i> (series-Spain). 3. <i>El Cid</i> (series-Spain). <p>Claro TV – 1 Ibero-american titles</p> <ol style="list-style-type: none"> 1. <i>Monte Olivos</i> (series-Spain). 	
Total: 17	Total: 19	Total: 0
GRAND TOTAL: 36		

Source: *Obitel Mexico*.

At the national level, there were 16 premiere titles, series being the most widely used format; even though this year more Mexican productions had been announced by Netflix, many were postponed to 2021 and 2022; the U.S. company plans to make Mexico the epicenter of its fictional productions, and in January, by that reason, it moved its creative and production headquarters to our country.

It is worth mentioning that with the data extracted from reports by Parrot Analytics (The Global Television Demand Report, 2020) they display that in the 20 fictions with the highest audience in Mexico in the SVoD, there are two national and Ibero-American premiere productions: *Narcos 2* (Netflix) in second place and *La Casa de las Flores* (3rd season) at 12th. place.

Table 7. The 2020 premiere fiction in VoD: countries of origin

Country	Productions	%
NATIONAL (total)	17	47,0
OBITEL COUNTRIES (total)	19	53,0
Argentina	0	0,0
Brazil	4	21,0
Chile	0	0,0
Colombia	1	3,0
Spain	10	52,0
U.S.A (Hispanic production)	4	21,0
Mexico*	17	100,0
Peru	0	0,0
Portugal	0	0,0
Uruguay	0	0,0
Venezuela	0	0,0
COPRODUCTIONS (total)	0	0,0
Mexican coproductions **	0	0,0
OBITEL Countries Coproductions	0	0,0
GRAND TOTAL	35	100,0

Source: *Obitel Mexico*.

It is to point out that in the SVoD, Spanish productions dominate the scene with 10 of the 18 premiere titles in 2020, followed by

Brazilian productions with four titles, this in relation with the Ibero-American titles.

4. Fiction and Audience Participation in Digital Settings

4.1 Proposals for digital expansion

SVoD platforms promote, from digital social media, the content they produce. Although in some series they manage their own social media accounts, there is a “global” management in order to promote the platforms catalog contents of the Latin American region. In the case of productions made in Mexico, they are also promoted on Twitter through @Netflix Latin America. The account has 5,7 million followers and has posted more than 72 thousand tweets. This was created on October 31, 2020, apparently it is managed by a male, and it informs about new releases, new seasons, and they even throw some questions to the followers; also, they offer audience data of the series, as it can be observed in the following image, which refers to the series *The Queen’s Gambit* (*Gambito de Dama*), one of Netflix’s original productions with the highest audience also in Mexico:



Source: <https://twitter.com/NetfixLAT>

Netflix also has a Facebook account @Netflixmx with more than 73 million followers. On the other hand, Amazon Prime Video also promotes content through social media. On Twitter, in November 2019, it opened the account and has just over 199 thousand followers. On Facebook, @PrimevideoLAT has more than 15 million followers. Disney + Latin America (@Disneyplusla) has 524.000 followers and opened the account in June 2018. On Facebook, the @DisneyPlusLatino account has just over a million followers.



Source: @Disneyplusla

Through digital social media, the Video on Demand industry constantly promotes its contents and measures the thermometer of what the audience likes. In Latin America there are more than 60 million users of digital social media. Without a doubt, it is a market strategy for content promotion to use these networks by SVoD platforms.

4.2 Social interactivity

Without necessarily being a fiction, *La Más Draga* positioned itself as the most viewed paid content on YouTube in Mexico for the second consecutive year⁹, although in 2020 it broke all records by being the most viewed Mexican production of the year on this platform and it also stood out for being the exclusive content for which more Mexican users paid.

La Más Draga is a drag competition web series produced by *La Gran Diabla*, where diverse members of the LGBTTTQI+ community compete to find out who achieved the best characterization (wardrobe, makeup and hairstyle) within a series of dynamics imposed on them and that must be performed in the live broadcast, presented every Tuesday at 9:00 p.m. on its platform.

During 2020, this production carried out its third season, which has been the most successful one, since the money raised was used to support members of the LGBTTTQI+ community who lost their jobs or faced severe economic problems due to the COVID-19 pandemic.



Source: *La Más Draga*

9 See: <https://www.youtube.com/playlist?list=PLrkgxVsNPCm113PQmJpK6wLbOh6kb4aV>

The innovativeness about this format is that in order to watch the “live ” streams or the exclusive content, you had to pay 99 pesos per broadcast (5 USD); days later, these same contents were uploaded to its YouTube channel with an edited version. Unofficially, the end of the third season that took place on December 1st, 2020, managed to capture the attention of more than 500 thousand users who paid in order to see the broadcast on that platform.

4.3 Emerging fiction productions

The “exclusive content” format also had its peak with other YouTube content creators, mainly with singers and/or comedians, who also commercialized “*lives*” (live streams) and special content on their channels, as a way to seize resources after the theaters, nightclubs and auditoriums were closed.

Likewise, independent fiction producers took advantage of the *web series* format in order to place on YouTube some productions whose themes revolve around the LGBTTTQI+ community, which demonstrates -as happened with *La Más Draga*- the lack of opportunity and visibility of other identities and gender orientations, not only in Mexican fiction, but also in national open television.

Some of the web series on these themes, which have been very successful are *La Bastarda* and *Ana, la Chica Bolera*, both made not only with thematic of gender diversity, but also acted by actresses and actors from the LGBTTTQI+ community.

An example of independent production that found shelter on YouTube were: *Bravas*¹⁰, a new dramatic webseries inspired by Latin urban music that follows three friends, Mila, Roja and Ashley, who

¹⁰ See: <https://www.youtube.com/playlist?list=PLrkgxVsNPCm1l3PQmJpK6wLbOh6kqb4aV>

seek to find their place in the world; and *Gris*¹¹, which tells the story of Angie and Lara, who were brought together by the quarantine and must spend the confinement together in an apartment.

5. Highlights of the year

Although the year has been marked, without a doubt, by the pandemic, another of the great issues that the country suffers from is violence, mainly of gender, because according to data from feminist groups such as “*Nosotras tenemos otros datos*” (We have other data), 2020 was recognized as “one of the most violent years for women and girls” in Mexico.

Compared to the previous year, 2019, a 39% increase in requests for care and support to the National Shelter Network (Red Nacional de Refugios) (which provides security for women who suffer from domestic violence), which is translated into 46.000 women, girls and teenagers who were victims of violence. Meanwhile, during the last four months of 2020, they offered 11.132 accompaniments through social media, telephone and protection spaces.

With these actions, they identified that, in the majority, 75% of their aggressors were their partners and former partners. The most worrying thing for the Network is that during November and December of the same year, every hour, a woman asked for support from the Red Nacional de Refugios. Finally, four out of every hundred women reported a femicide attempt.

In addition, they agreed that the re-victimization by the authorities is constant and worrying. On one hand, the authorities continually outrage women who were looking for support or to make an

11 See: <https://www.youtube.com/watch?v=NFvO7rzNikA>

accusation, -who already came from a complex violence context-. On the other hand, they inhibit the access to justice, the proper process and, finally, the imprisonment of their aggressors, which means a circle of impunity.

This terrible reality was not an outsider toward Mexican telenovela, so characterized by obviating this environment or minimizing it in their narratives, since one of the telenovela that stood out the most for addressing it was *Vencer el Desamor*, which presents this problem through the investigation that a journalist does about a serial femicide. At the end of each chapter, each of the characters offered some advice to the audience so that they denounced violence situations, in case of experiencing them, and there were published telephone data so that the audience could seek support. This as a social service.

It is worth highlighting, there are two productions of the project called “*Vencer*”, which seeks to address relevant social issues in order to help battle gender violence, as well as empower female audiences.

Vencer el Miedo dealt with the gender violence that women of different ages face in Mexico, and *Vencer el Desamor*, which sought to denormalize the violence that tend to be justified because of the love of a couple, and it also addressed gender violence, which makes evident that Mexican audiences are eager for content that approach this reality. Between 2015 and 2020, the number of victims of femicide grew by about 130%, according to data from the Executive Secretariat of the National Public Security System (Secretariado Ejecutivo del Sistema Nacional de Seguridad Pública)¹².

Both fictions were positioned as two of the top ten most viewed of the year, being adult and young women who most watch them.

12 <https://www.economista.com.mx/politica/Violencia-contra-las-mujeres-al-alza-en-2020-20201229-0001.html>

The comeback to fiction production

TV Azteca had announced in 2019 through Alberto Ciurana, who was the general director of content and distribution of TV Azteca: “may the telenovela rest in peace”. However, in May 2020 he retracted announcing the retransmission, through his channel 7 (canal 7), of the successful telenovela *Betty, la fea (Ugly Betty)*, and Ciurana himself, through a tweet, declare: “and they were not dead ... they were partying”. Apparently, TV Azteca plans to produce and broadcast telenovelas and series again in 2021.

Unfortunately, this comeback does not seem to be present in other networks such as Imagen Televisión or Canal Once, which for the second consecutive year haven’t produce any type of series or telenovelas.

6. The Theme of the Year: *The fiction in times of the pandemic in México*

In Mexico, the case of the first contagion by Covid was presented in February 2020. Since then, to date, more than 2.300.000 people have been infected and 212.000 have died in a country of just over 126 million. The federal government implemented measures to restrict and close non-essential activities and businesses from March 26, 2020. Through the Secretary of Health, Dr. Hugo López-Gatell, the measures in order to avoid contagions were announced, in view of the new pandemic, known as SARS-CoV-2 (Covid).

Evidently, the closure of activities also affected the television content production companies, which were forced to suspend their productions for some months. Such situation had never been experienced before, worldwide, so this took us all by surprise, and we had to adapt to the new reality. It was expected, that the effects of this pandemic

would affect all the areas on which television networks depend on, mainly advertising revenue and content production.

Economic costs and losses during the confinement periods

In the case of Televisa, in its investment report for 2020, published on its portal, (2021)¹³ it announced:

...given that they are considered essential economic activities, we have continued to operate our uninterrupted telecommunications businesses and media in order to continue benefiting the country with connectivity, entertainment and information, and during the fourth quarter ended December 31, 2020, we continued with production content again following the health requirements and guidelines imposed by the Mexican government. During the trimester ended on December 31, 2020, our content business recovered from previous trimesters during the pandemic as a result of the flexibility of the lockdown restrictions in some jurisdictions where customers are located. Nevertheless, we are partially dependent on the advertising demand of business consumers, and the COVID-19 pandemic has caused and could cause advertisers to reduce or postpone their advertising spending on our platforms”.

For its part, TV Azteca stated in its 2020 report that “The deterioration in economic activity indicators derived from the health contingency continues to affect the dynamism in the broadcast television

13 <https://www.televisair.com/~media/Files/T/Televisa-IR/PPTS/210303-4q-2020-gtv-presentation.pdf>

advertising market in Mexico, so despite the solid audience levels, TV Azteca reported a decrease in net sales in the trimester”¹⁴.

Therefore, these television companies had decreases in their sales revenues: Televisa had a 7% drop in profits, mainly as a cause of the pandemic effects. Because some projects were suspended, and productions were withheld entirely for a few months, they had savings in their original 2020 plan, in total of 2.2 billion pesos. While TV Azteca, in 2020, had a 4% drop in its net sales (its sale in 2020: 3.912 million pesos; while in 2019: 2.863 million pesos).

The role of public television stations on the global pandemic was to organize informative programs related to the coronavirus, having specialists to guide the audience. On Channel 11.2 (Canal 11.2) of the National Polytechnic Institute (Instituto Politécnico Nacional), online classes “Learn at Home on TV” (Aprende en Casa por TV), are still broadcast for the basic levels of public education (pre-school and elementary school).

Televisa productions “stopped”

Televisa had to stop the fiction production, “never in my life we had stopped a telenovela, never” declared Lucero Suárez, the producer of the highest rating telenovela in 2020, *Te doy la Vida*. The cancellations of productions occurred in the months of March and April, returning to sets in the month of May. When the first coronavirus outbreak began, the producer Suárez decided to speed up the production,

14 <http://www.irtvazteca.com/>

adding one more day to the recordings (Saturdays). For the last episodes of the telenovela, the scenes were filmed with measures of social distancing, without kisses or any other physical contact.

Another production that was interrupted by the coronavirus was the melodrama *Imperio de Mentiras*, starring Angelique Boyer, which had only 20% of filming before it stopped. This production was scheduled to premiere at the end of April, but it began on September 14, 2020. Several leading actors of this production were infected, so in a press release of October of that year, it was announced the labor stoppage regarding to that telenovela.



Source: <https://www.facebook.com/televisaprensamx/>

The production *La Mexicana y el Güero*, starring the actress Itatí Cantoral was also affected. Its recording was postponed in March, resuming on June. Recording in the streets was not allowed, all had to be in studios.

While the successful dramatized unitary program *La Rosa de Guadalupe* stopped the productions since the Federal measure "Healthy Distance" (Sana Distancia) was implemented, as well as the

order to stop non-essential work activities, for which it stopped the recordings in March.

Re-runs in order to “fill” spaces

Due to the stoppage in the production of telenovelas, it was decided to broadcast the bioseries *Silvia Pinal, frente a ti* in prime time in April 2020, and *Hoy voy a cambiar*, a biopic about the life of the interpreter Lupita D’Alessio, in May. That place corresponded to the telenovela *Imperio de Mentiras*, as we mentioned, its production stopped and was able to be released until September.

On the other hand, the unitary program *La Rosa de Guadalupe* changed its timetable for some weeks, and was broadcast an hour ahead of the usual, beginning at 8:30 p.m., before the broadcasts of *Vencer el Desamor* began. *La Rosa de Guadalupe* has constantly changed timetables since it first appeared. It seems that since it is appreciated by the public and due to the big amount of material it has produced, it is a “wild card” program in order to move it as convenient. This program transmitted a compilation of its best episodes, since it could not release new episodes either, because it had paused the production since the end of March.

Protocols and strategies for the return of fiction production on broadcast television

In the case of Televisa, protocols were implemented to protect the staff (production, actors, etc.). One of the strategies to protect and avoid contagion was to avoid love scenes, but a telenovela with-

out kissing scenes is not the same. According to the producer Rosy Ocampo, color codes (from green to red) were implemented in Televisa. As for the red code, these scenes are those that required some kind of closeness, with acts of passion and kisses, and in order to perform them, the actors were required to apply the Covid test. In addition, the set was cleaned as if it was an operating room in a hospital, and fewer staff were allowed on the set.

In the telenovela *La Mexicana y el Güero*, when they arrived on the set, the actors' temperature was taken, and they all had to wear facemasks. Disinfectant mats, portable sinks and antibacterial gel were installed in the forum. In the makeup area, the staff had to follow different protection protocols, and they made up the actors by turns.

While in *La Rosa de Guadalupe* they had to modify the logistics in order to mobilize the staff to locations, reducing spaces in transportation, which was also delaying the entire production process; the recording hours are more restricted (7 a.m. to 10 p.m.)⁹. Each chapter of this fiction is recorded in two and a half days, with two independent units and equipment assigned to them, so they can record four chapters a week. Given the pandemic, the processes to prepare the scenes and disinfect the equipment, as well as its transfer, forced them to have more pressure, once they resumed the recordings, after a stoppage of months.

Contents with the topic of Covid

As for the pandemic being addressed in the stories of the melodramas, we find that in 2020, only *La Rosa de Guadalupe* and *Como Dice el Dicho* addressed the problem, despite the fact that at the beginning of the pandemic their producers had announced that they would not address the coronavirus issue (in the case of *La Rosa*

de Guadalupe). However, in this unitary, they did it from two angles: 1) As a problem within the story; some of the characters were infected with the Coronavirus, and this unitary portrayed the situations that many families have suffered and still suffer from having a sick person at home; 2) As a context within the story: meaning, the epicenter was another social problem, but Covid was part of the daily lives of the characters, of their social environment. All the characters wore face masks, or masks. Chapters titled as: *Beatriz is attacked with chlorine, just for being a nurse (Beatriz es atacada con cloro, solo por ser enfermera)*; *Zoila's daughter catches Covid-19 (La hija de Zoila se contagia de Covid-19)*; *Deadly virus (Coronavirus)*; *Toñito goes to work during the pandemic (Toñito se pone a trabajar durante la pandemia)*; *Aníbal and Sol become parents amid Covid-19 (Aníbal y Sol se convierten en papás en medio de Covid-19)*; *Davina suffers from her online classes! (¡Davina sufre por sus clases en línea!)*.

Some episodes of the official page of *La Rosa de Guadalupe* have more than 6 million views and the topic addressed in these episodes demonstrates some of the situations experienced in Mexico during the pandemic; such as the attack on the medical personnel by the citizens; or the difficult conditions of a vast majority of the population in Mexico, such as those experienced by students who take their classes online. As a characteristic insignia of this unitary, the solution focuses on the miracle and the faith, and the intercession of the Virgin of Guadalupe for the problem solving. For its stage director, Eduardo Said, the success of this unitary is due to the fact that there is an empathy with the audience “so that for the people who watch it, recognize ourselves in what happens as well as the people shown there, and then we remain in the screen and people say “of course this has happened to me or it has happened to someone I know, and I can learn from it”¹⁵.

We cannot fail to mention Martín-Barbero, who in the book *De los medios a las mediaciones* (1987) precisely, reflected on this point of recognition.

Another of the Televisa productions where the issue of the pandemic was addressed, was the unitary *Como dice el Dicho*. In this series, is narrated a story in which a “saying” is selected and in program stars one of the most recognized comic actors in Mexico: Sergio Corona. Some of the titles of its episodes are: *Almendrita is infected by the recklessness of her sisters (Almendrita se contagia ante la imprudencia de sus hermanas)*; *Daniela makes a quarantine panic shopping (Daniela hace compras de pánico por la cuarentena)*; *Medicine heals and love heals (La medicina cura y el amor sana)*; *Dany Has a Panic Attack Over Covid News (Dany sufre un ataque de pánico por las noticias de Covid)*.

In the production of *Vivir el Desamor*, Covid-19 was nor the subject of the narrative, neither the characters wear face masks, however, in the musical closing of the telenovela when the credits appear, it appeared scenes with the members of the production in in the set, wearing face masks. In one of the episodes, the main character, played by actress Daniela Romo, addresses the audience explaining the departure of an actor (Leonardo Daniel) from the production, because he had been infected with Covid. The actress reported the name of the actor who would replace him.



Image: Scene from *Vivir el Desamor* (2020).

Source: <https://www.milenio.com/espectaculos/television/rosy-ocampo-tele-novela-concientiza-cambia-habitos>

In the rest of the 2020 telenovelas, the Covid issue did not appear in the content. However, at the beginning of 2021, the new production of Juan Osorio was launched, precisely at the timetable left by *Vivir el Desamor*. The telenovela produced by him, *¿Qué le pasa a mi Familia?*, addressed the issue of the Covid-19 pandemic, and it was known that he had a warning that he would be punished, from the upper spheres of Televisa, for having discussed the issue in that telenovela.

The warning was due to not having notified the company that it would address this issue: The producer stated that: “Sometimes it is hard for us to accept reality, but nevertheless, it is not only a problem in

my country, it is a global issue and that we have to approach it, whether we like it or not”¹⁶.

Some reflections

From what we can observe, the only television company in Mexico that produces telenovelas in the country is Televisa, in 2020. But the pandemic affected all television networks, and all had losses due to advertising. TV Azteca just announced its return to fiction and it did so with the rerun of *Lo que Callamos las Mujeres*, which will be reported in the 2021 yearbook, and Imagen TV continues to buy telenovelas produced in other countries (Turkish telenovelas) and broadcast bioseries, such as *Paquita la del Barrio*. In face of the enormous challenges imposed by the Covid-19 pandemic, Televisa had to stop its productions, to protect its staff but also to comply with the federal measures. Such an event had never occurred in its history. Taking stock, we can say that it gained an audience on broadcast television; The rating reports for this year indicate at least that the first place (within the top ten fiction) with the highest audience on broadcast television, in 2020 it obtained one point more than the one reported on the same site in 2019. The dramatized unitaries continue to rise in Televisa. In the case of *La Rosa de Guadalupe*, it remains as one of the most successful fictions of all time, with an average of 17 rating points, while *Como dice el Dicho* obtained 16,22 points, almost one point more than in 2019. These two productions were the only ones in 2020 to address the issue of Covid-19. Televisa left the pandemic out of the contents of the traditional melodrama (telenovelas). What does this say about it? Why did Televisa decide not to address this topic in their stories?

16 <https://www.milenio.com/espectaculos/famosos/juan-osorio-televisa-castigo-hablar-covid19-novela-video>

We believe that they have remained very consistent with their philosophy of “entertaining” the audience. Although, in several productions, as we have reported, they address cases in telenovelas that have to do with social issues, in the case of the pandemic it is a revealing fact that it has not been included in the stories. We consider that the public experiences great uncertainty in the face of a unique and unexpected event, totally new, and they receive a lot of information from the media (including the social media) which saturates the public. Much of this information is negative, or false. Perhaps the executives of Televisa decided not to saturate the telenovelas with more content about the pandemic, in order to give the audience a “break” from what they are living.

Only the unitaries *La Rosa de Guadalupe* and *Como Dice el Dicho* approached the issue of Covid-19, and as we mentioned, only in 2021 one of the most successful producers, Juan Osorio, dared to address the problem in a telenovela. Unlike other countries in which the television networks opted to produce fictional content that addressed the pandemic, Televisa did not, neither the other private nor public television networks.

All private television stations have suffered enormous economic losses, while SVoD platforms doubled subscribers and began to include more telenovela in their catalogs. As in the case of Netflix, which in 2020 included the successful telenovela *100 días para Enamorarnos*, produced by Telemundo (United States) and which was halfway through the recordings when the pandemic appeared and resumed the production months later. This indicates that platforms such as Netflix are aware that this genre is liked by the audiences. Releasing all the episodes, without the audience having to wait as it does in linear television in order to consume the content with the flexibility that the platforms allow.

As a closure

Undoubtedly, the pandemic and more than a year of home confinement brought with it new media practices that will hardly change and that, without a doubt, have profoundly modified both, the IT and the entertainment industries; for example, the series of activities that we can solve through technological mediation; we learned that we can meet with others in order to figure out or agree things without having to meet in person, but mainly, we learned that all entertainment can stay at home and this is validate by the increase of VoD platforms and systems during the pandemic.

This predominance, driven by the pandemic, has created a re-adjustment in the entertainment industries, since those who do not join this new market will be destined to perish; for this reason, we want to close this chapter with the merger in streaming services between Televisa (Mexico) and Univisión (United States), announced on April 13, 2021, in order to create what they called the most important Spanish-language media system in the world.

This, we consider, will mark the agenda of television production in Ibero-America for the consecutive years, as it is a bet to compete for -from the Ibero-American sphere- with the *streaming* owners: Netflix, Amazon and now Disney +, among others.

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PERU: BETWEEN CRISIS AND HOPE¹

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Introduction

Faced with the arrival of the first cases of Covid-19 in Peru, the government of President Vizcarra decreed strict lockdown on March 16, 2020, which lasted -with stages of relaxation- until July 1. This caused a series of changes in the lives of Peruvians and affected television production activities. With no possibility of producing fiction for months, projects were halted or cancelled -including fictions that were being broadcast- and the different TV stations turned their programming to information, extending newscast schedules, live broadcast, and broadcasting the president's press conferences on national network. The pandemic, however, failed to stabilize the political crisis that the country has been experiencing since 2016, and some television stations joined the attempts of a group of congressmen to seize power.

Populist initiatives that created instability and confrontations with the Executive Branch were generated from the Congress, where the president had no political representation. The Congress accused the president of corruption and achieved his vacancy on November 10th for "permanent moral incapacity", a broad and indefinite term on which the Constitutional Court refused to rule due to a gap in the law, despite requests from various politicians and the president himself. With the attempts to vacate from office President Kuczynski (2018) and then Vizcarra (2020), it was demonstrated that motives are not important, but to have enough votes in Congress. Once President Vizcarra was ousted, the President of Congress Manuel Merino took his place. The population saw this as a coup from corrupt groups in the Congress, and despite the

state of sanitary emergency, there were massive demonstrations throughout the country, the largest in Peru's history. After several days of clashes between the population and police -which resulted in three dead and almost two hundred wounded- Merino resigned from the presidency on November 15th. During the few days Merino was president, the cyber activist group Anonymous blocked several websites of the Peruvian State, as well as the web of Wilax TV network (promoter of Vizcarra's vacancy), and the Twitter account of América Televisión. This cyber activist group, together with a collective of k-poppers, also managed to deactivate the account of journalist Beto Ortiz, who mocked the protests and their victims.

It is in this context that television fiction had to look for new ways to continue on the air, trying different attempts to return to production, facing new cancellations, seeking to adapt to the health situation which ultimately brought to a reduction in episodes produced in the year to half of what it was seven years ago. The situation of TV production began to normalize towards the end of 2020, and the screen returned to a similar programming of previous years.

In February 2021, it was announced the death of José Enrique Crousillat, Peruvian producer of successful *telenovelas* in Venezuela, Argentina and later in co-productions with Telemundo. Crousillat was owner of América Televisión and founder of América Producciones, which relaunched the internationalization of Peruvian *telenovelas* in the 90s. After the fall of the Fujimori-Montesinos regime, Crousillat fled the country when his acts of corruption were discovered. Once captured, he was sentenced to eight years in prison.

1. Peru's audiovisual context in 2020

1.1. Open television in Peru

Chart 1. National open TV networks/stations in Peru

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

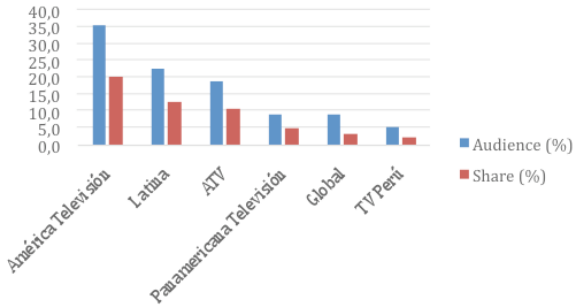
Source: Observatorio Audiovisual Peruano

Graph 1. TV audience and share by network

Network	Home Audience	Audience (%)	Share (%)
América Televisión	7.16	35.6	20.1
Latina	4.55	22.6	12.8
ATV	3.77	18.7	10.6
Panamericana Televisión	1.79	8.9	5.0
Global	1.79	8.9	3.0
TV Perú	1.07	5.3	2.0
TOTAL	20.13	100	53.5

* The share is not 100% because it does not include other open TV channels, cable and VHS/ DVD.

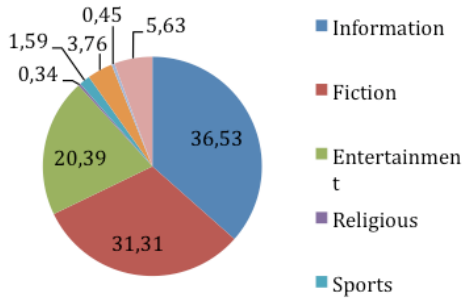
Source: Observatorio Audiovisual Peruano (OAP) and Kantar Ibope Media



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

Graph 2. Genres and hours broadcast on TV

Genre	Exhibition hours	%
Information	19253:30:00	36.53
Fiction	16500:30:00	31.31
Entertainment	10744:30:00	20.39
Religious	180:30:00	0.34
Sports	840:00:00	1.59
Education	1980:30:00	3.76
Political	236:30:00	0.45
Others	2968:00:00	5.63
TOTAL	52560:00:00	100



Source: Observatorio Audiovisual Peruano

The six national broadcast TV networks observed for this report remained unchanged in terms of ownership composition. A change observed is that the drop in open television audience, registered since 2014, stopped and returned to levels close to those of 2017, this as a consequence of the forced lockdown which kept millions of Peruvians in their homes, and that open signal television was used to try to supply school education.

If last year the fall in fiction hours with respect to previous years was highlighted, this pandemic year shows the lowest percentage in a whole decade. The pandemic not only reduced the number of produced hours in the country, but also reduced fiction importation or reruns. The population's need for information led networks to fill the screens with informative products, genre that managed to occupy most television screen time during the year for the first time since we have been writing this yearbook. On the other hand, the need to supply school education led to a sevenfold growth of the educational genre, which no longer occupies the last places in the chart. However, its numbers speak of an indifferent commercial television as a complement to education, even in times of severe crisis.

Although América Televisión maintains the first place in audience share, its audience is the lowest in the last decade, being the network that lost the most audience in open television during the pandemic. On the contrary, ATV had a rebound, reaching audience percentages it had not achieved since 2015. Another notorious increase -although at marginal levels- can be seen in Global Televisión, which surpassed TV Perú in fifth place, something that had not happened since 2016. Not only Global Televisión's audience recovery is striking, but also the audience reduction of the state channel, which broadcast hours of information on the health situ-

ation, the President's daily conferences, and many hours of school classes. This drop of TV Perú allows to infer that, although there was a great need to know what was happening with the pandemic, it came a moment of saturation where the population looked for another type of content that was not offered by the state-owned station.

On a different note, América Televisión had the satisfaction of winning the Non-English commercial of the year reward of the Shots Awards of the Americas. The commercial⁵ was based on the successful Soap opera *De Vuelta al Barrio*, where the relationship created between a character of the soap opera and a female viewer was presented through the screen, talking about audience loyalty.

1.2. Pay TV and VoD platforms in Peru

Chart 2. Pay TV channels in Peru

10 Most watched Pay TV networks in 2020
1) Discovery Kids (Children),
2) Cartoon Network (Children)
3) Discovery Adults (Information)
4) Canal N (Information)
5) Disney Channel (Children)
6) Disney Junior (Children)
7) Fox Channel (Fiction)
8) TNT (Fiction)
9) TL Novelas (Fiction)
10) Cinecanal (Fiction)

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

5 <https://www.youtube.com/watch?v=YxIVOfjMHH0>

Peru showed little change in terms of cable provider companies. Movistar continues to be the leader in customers (63%), followed by DirecTV (19%) and Claro TV (8%). Something that generated a surprise in pay TV in Peru was Movistar's exit of Televisa's signals (TL Novelas and Las Estrellas) in July, which in previous years had been at the top of the ratings charts among cable channels. Despite being absent for half a year, TL Novelas managed to occupy the ninth place in audience among cable channels. Although not directly related, it should be noted that in the first months of confinement the Turkish fiction channel Kanal D Drama registered record audiences, surpassing its competitors in Peru.

Also notorious is the presence of Canal N, a Peruvian cable news channel, result of a year of pandemic and political instability in the country, which created a need for information about the events in Peru.

Chart 3. VoD in Peru

The most important platforms available in Peru are listed. YouTube channels of any operator are not included.

Main VoD platforms active in 2020	Total
América TV GO, Latina Play, ATV Play, TV Perú App, Panamericana App, HBO Go (WarnerMedia), Fox Play, Fox Latinoamérica (App), Fox Sports (App), ESPN Play, Claro Video, Movistar Play, DirecTV, Fútbol Movistar, Netflix, Prime Video (Amazon), Apple TV (Apple), Instagram TV, Pluto TV, Disney+	20

Source: *Observatorio Audiovisual Peruano (OAP)*

The most important change in VoD offering was Disney+ entry in November 2020. The platform joins Netflix, Amazon, Apple TV, and Peruvian channels platforms. It has also been announced that the new HBO Max platform will be available in June 2021, and months later Paramount plus will also enter the market, although some of its offerings are already available on HBO Go and Apple TV. Likewise, the Vietnamese company Viettel launched Bitel series+ platform for its users for an additional payment to the mobile communication service.

Three Peruvian fiction series were present in these platforms. Movistar Play offered *Aislados* and *Raúl con Soledad*. The first one is a political thriller that combines the country's widespread corruption with the pandemic, while the second is a comedy made by the production company Tondero and tells the story of a couple who decides to get divorced when full quarantine is decreed, forcing them to continue living together and taking care of each other. América TVGO offered *Papá en Cuarentena*, a comedy that narrates the problems of an irresponsible and clumsy separated father, who must spend the quarantine with his young son. It should be noted that *Raúl con Soledad* was first released on the Netzun platform, while *Papá en Cuarentena* was first offered on YouTube.

The most important news for Peruvian television fiction regarding VoD was the premiere on Netflix of *El Último Bastión*, in March 2021. This historical miniseries produced by the State-owned station (see yearbooks 2019 and 2020) managed to stay at the top of the platform's charts for several weeks.

1.3 Independent producers of television fiction

The year 2020 was particularly difficult for independent production companies, as well as for the Peruvian audiovisual industry as a whole. Nevertheless, Del Barrio Producciones produced *La Otra Orilla* and *Mi Vida sin Ti* (both will be discussed in sections 5 and 6 of this chapter), while ProTV produced *Princesas*, all of them released between August and December. *Te Volveré a Encontrar*, a *telenovela* produced by ProTV in 2017 but that had never been premiered, was the one that allowed to continue having national television fiction in prime time while production companies adapted to the protocols to resume production.

1.4. Financing sources for the audiovisual sector

According to data from CPI company, the economic crisis generated by the pandemic meant a 24.2% reduction compared to 2019 in the advertising budget. Television advertising accounted for 42.5% of investments, the lowest percentage in the last five years. In contrast, the largest increase in advertising investment was on the internet where it accounted for 27.1%, while in 2019 it had a share of 19.9%. The largest decreases in advertising investment were in print media, which saw these investments reduced by more than half. According to CPI, this may have been due to paper import restrictions during the pandemic and fear of contagion through physical contact.

The pandemic and the resulting economic crisis reduced the possibility of funding or sponsorship. However, it was ob-

served in this period that 11% of the ads that were broadcasted during quarantine had some direct relation to COVID-19, thus marking the advertisers' priorities.

1.5. Communication policies

The national emergency situation froze any policy to advance in reforms or development of digital television. The government, however, did provide facilities to freeze or defer fees and debts payments to broadcasters. The most important regulations were related to security protocols for audiovisual production. In October 2020, RM 000266-2020-DM/MC was issued, which approved "the health protocol to implement surveillance, prevention and control measures against COVID-19 in the production of audiovisual advertising and cinematographic works", establishing the recommendations to prevent and control the spread of the pandemic, formalizing several of the measures that companies had already acquired, although this meant an increase in production costs, and lengthened filming schedules.

1.6. Digital and mobile connectivity infrastructure

The digital infrastructure revealed its shortcomings in the country during the pandemic. Although most of the coastal localities have acceptable levels of mobile and digital connectivity, the Andean and Amazonian localities showed serious deficiencies, especially when attempts were made to supply school classes through alternative means. A report by the National Institute

of Statistics and Informatics shows that only 40.1% of Peruvian households had internet access in 2020. Although this represents an increase of 3.4% compared to 2019, the report highlights that in rural households, access reaches only 5.9%.

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

Table 1. Fiction broadcast in 2020 (national and foreign; premieres, re-runs, and co-productions)

PREMIERE NATIONAL TITLES – 11

América Televisión - 11 national titles

1. *Chapa tu Combi* (telenovela)
2. *Dos Hermanas* (telenovela)
3. *La Otra Orilla* (telenovela)
4. *Los Vilchez 2* (telenovela)
5. *Mi Vida sin Ti* (telenovela)
6. *Princesas* (telenovela)
7. *Te Volveré a Encontrar* (telenovela)
8. *De Vuelta al Barrio* (soap opera)
9. *La Rosa de Guadalupe Perú* (series)
10. *O Besas o no Besas* (miniseries)
11. *Yo Perdí el Corazón* (miniseries)

COPRODUCTIONS – 5

Global – 4 titles

1. *Dueños del Paraíso* (United States and Chile)
2. *Rosario Tijeras* (United States and Mexico)
3. *Rosario Tijeras 2* (United States and Mexico)
4. *Rosario Tijeras 3* (United States and Mexico)

América Televisión – 1 title

5. *Luis Miguel: La Serie* (United States and Mexico)

DBITEL PREMIERE FOREIGN TITLES – 33

Latina – 4 titles

1. *Jesús* (series – Brazil)
2. *Perdona Nuestros Pecados* (telenovela – Chile)
3. *Yo Soy Betty, la Fea* (telenovela – United States)
4. *Perseguidos* (telenovela – Mexico)

América Televisión – 10 titles

5. *Como Tú no Hay 2* (telenovela – Mexico)
6. *Te Doy la Vida* (telenovela – Mexico)
7. *La Rosa de Guadalupe* (series – Mexico)
8. *Cita a Ciegas* (telenovela – Mexico)
9. *La Reina Soy Yo* (telenovela – Mexico)
10. *La Usurpadora* (telenovela – Mexico)
11. *La Vecina* (telenovela – Mexico)
12. *Mi Marido Tiene más Familia* (telenovela – Mexico)
13. *Soltero con Hijos* (telenovela – Mexico)
14. *Sin Miedo a la Verdad* (series – Mexico)

Panamericana Televisión – 3 titles

15. *Esmeralda* (telenovela – Brazil)
16. *Marido en Alquiler* (telenovela – United States)
17. *Dama y Obrero* (telenovela – United States)

TV Perú – 1 title

18. *Golpe al Corazón* (telenovela – Argentina)

ATV – 8 titles

19. *La Reina del Flow* (telenovela – Colombia)
20. *Las Hermanitas Calle* (telenovela – Colombia)
21. *Las Muñecas de la Mafia 2* (telenovela – Colombia)
22. *Sobreviviendo a Escobar* (series – Colombia)
23. *El Señor de los Cielos 7* (telenovela – United States)
24. *Cuidado con el Ángel* (telenovela – Mexico)
25. *La Dueña* (telenovela – Mexico)
26. *Mañana es para Siempre* (telenovela – Mexico)

Global – 7 titles

27. *El Estilista* (telenovela – Colombia)
28. *Gran Hotel* (series – Spain)
29. *La Escuelita VIP* (series – Mexico)
30. *María de todos los Angeles* (series – Mexico)
31. *Nosotros los Guapos* (series – Mexico)

NON-OBITEL PREMIERE FOREIGN TITLES – 7

Latina – 2 titles

1. *Fuerza de Mujer* (telenovela – Turkey)
2. *La Venganza de Iffet* (telenovela – Turkey)

América Televisión – 1 title

3. *Recuerda Cariño* (telenovela – Turkey)

Panamericana Televisión – 3 titles

4. *Princesa Valiente* (series– China)
5. *Amor Eterno* (telenovela – Turkey)
6. *Una Mujer Desconocida* (telenovela – Greece)

Global – 1 title

7. *Perdóname 2* (telenovela – Turkey)

TITLES RERUNS – 106

TOTAL NATIONAL PREMIERE TITLES: 11

TOTAL OBITEL PREMIERE TITLES: 36

TOTAL PREMIERE TITLES (NATIONAL AND OBITEL): 47

Source: Observatorio Audiovisual Peruano (OAP)

Despite the reduction in total episodes produced that has been mentioned before, this 2020 showed a notable increase in the total number of premiere and reruns titles shown, 153 in total. This is the highest number in all the years in which Peruvian programming has been monitored, namely since 2012. In the case of reruns, the increase is due to filling the gap in programming hours left by the suspension of national premieres due to the pandemic. Premier titles, although initially halted, managed to return to the programming grid in the second half of 2020.

The national premiere titles, 11 in total, have recovered in terms of quantity (as we will see in section 5) if compared to

the contraction observed in 2019, when only 8 Peruvian fictions were exhibited. It should be noted that this 2020 is the first year in which all national titles belong to the same network, América Televisión, which as mentioned above, remains in first place in audience ratings despite having lower figures than in 2019.

It is also noticeable that there has been an increase in co-productions between Obitel countries, which had not been reported in Peruvian channels since 2017. The number of Obitel premiere foreign titles, 36, has also experienced a notorious rise, doubling previous year's figures when were only 16. The opposite occurs with reruns since there has been a slight drop compared to the 110 titles screened in 2019. Nonetheless, it is a high figure compared to previous years.

Finally, a new data present is the recognition of premiere fictions from other non-Obitel countries that are present in Peruvian channels. It should be pointed out that this is not a last year's phenomenon but has been constantly present on our screens and those of the other Obitel countries, as described in previous year-books. In the Peruvian context, most of these fictions still come from Turkey, an unusual fiction source for our networks, whose search for the next audience phenomenon such as Turkish *telenovelas* has expanded to other horizons like China and Greece. In Peru, there were also fictions from Japan, South Korea, Romania and India, some of which are still on screen as reruns.

Table 2: Premiere Fiction in 2020: Countries of origin

Country	Titles	%	Chapters/ Episodes	%	Hours	%
NATIONAL (total)	11	23.4	444	20.4	442:00:00	20.6
OBITEL COUNTRIES (total)	31	66.0	1451	66.7	1418:00:00	66.1
Argentina	1	2.1	117	5.4	118:30:00	5.5
Brazil	2	4.3	112	5.2	112:00:00	5.2
Chile	1	2.1	140	6.4	128:00:00	6.0
Colombia	5	10.6	250	11.5	286:30:00	13.4
Ecuador	0	0.0	0	0.0	0:00:00	0.0
Spain	1	2.1	2	0.1	2:00:00	0.1
USA (Hispanic production)	4	8.5	232	10.7	231:30:00	10.8
Mexico	17	36.2	598	27.5	539:30:00	25.2
Peru:	11	23.4	444	20.4	442:00:00	20.6
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
CO-PRODUCTIONS (total)	5	10.6	279	12.8	284:30:00	13.3
Peruvian Co-productions	0	0.0	0	0.0	0:00:00	0.0
Obitel countries Co-productions	3	0.0	82	0.0	81:30:00	0.0
GRAND TOTAL	47	100.0	2174	100.0	2144:30:00	100.0

Source: Observatorio Audiovisual Peruano (OAP)

Observing the origin country of Obitel's premiere fictions in Peru, the current scenario shows the quantitative dominance of Mexican fictions in our market with 17 titles, recovering their number of titles exhibited on Peruvian screens compared to previous years.

Despite this, Peru is in second place on the list with 11 fictions released. A number that shows a reaction after two years of contraction. However, it should be taken into consideration that there were titles whose broadcasting was interrupted due to COVID-19; and, in addition, the broadcasting of three productions that had been postponed for several years or that were only available on América TVGO, as mentioned above. There were gaps to fill in the programming and América Televisión saw the opportunity to premiere on open signal what it had stored in its catalog.

A second group consists of the United States and Colombia, which have also seen an increase in their figures after the downturn mentioned in 2019. With minimal number of titles, following these cases are Argentina, Chile, Spain, and especially Brazil, which has seen its presence on Peruvian screens reduced notoriously in recent years.

Table 3. Formats of national and Ibero-American fiction

Format	National						Ibero-American					
	Titles	%	C/E	%	H	%	Titles	%	C/E	%	H	%
<i>Telenovela</i>	7	63.6	347	78.2	345:00:00	78.1	27	75.0	1491	86.2	1528:30:00	89.8
<i>Series</i>	1	9.1	20	4.5	20:00:00	4.5	9	25.0	239	13.8	174:00:00	10.2
<i>Miniseries</i>	2	18.2	9	2.0	9:00:00	2.0	0	0.0	0	0.0	0:00:00	0.0
<i>Telefilm</i>	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0	0:00:00	0.0
<i>Unitary</i>	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0	0:00:00	0.0
<i>Docudrama</i>	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0	0:00:00	0.0
<i>Others (soap opera, etc.)</i>	1	9.1	68	15.3	68:00:00	15.4	0	0.0	0	0.0	0:00:00	0.0
Total	11	100.0	444	100.0	442:00:00	100.0	36	100.0	1730	100.0	1702:30:00	100.0

Source: Observatorio Audiovisual Peruano (OAP)

The overall result of Table 3 leads us to consider the *telenovela* as the format that has remained predominant over the others. While this has been mostly the case, there are some differences between Peruvian and Ibero-American results in these years. Regardless of the variation in the individual amounts, in all recent years the *telenovela* has remained proportionally as the leading format in Ibero-American fictions. On the contrary, there has been a rotation between *telenovela*, series and miniseries as the most frequent formats among the fictions presented in the Peruvian context. It is important to highlight that for several years, soap operas have been among the formats considered in Peru and one with the highest audiences, first with *Al Fondo Hay Sitio* and now with *De Vuelta al Barrio*.

Table 4. The ten most watched titles in open TV

	Title	Channel	Producer	Format /Genre	N. of chap./ep. (2020)	Time slot	Rating	Share
1	<i>Los Vilches 2</i>	América Televisión	ProTV	Telenovela / Comedy	68	Prime Time	21.4	31.6
2	<i>Chapa tu Combi</i>	América Televisión	Del Barrio Producciones	Telenovela / Melodrama	45	Prime Time	20.3	31.0
3	<i>Dos Hermanas</i>	América Televisión	Del Barrio Producciones	Telenovela / Melodrama	12	Prime Time	19.9	29.3
4	<i>De Vuelta al Barrio</i>	América Televisión	América Televisión	Soap Opera / Comedy	68	Prime Time	19.0	30.2
5	<i>La Rosa de Guadalupe Perú</i>	América Televisión	América Televisión	Series / Melodrama	20	Prime Time	18.6	26.2
6	<i>Te Volveré a Encontrar</i>	América Televisión	ProTV	Telenovela / Melodrama	120	Prime Time	18.0	27.2
7	<i>La Rosa de Guadalupe</i>	América Televisión	Televisa	Series / Melodrama	17	Prime Time	18.0	29.8
8	<i>Princesas</i>	América Televisión	ProTV	Telenovela / Melodrama	22	Prime Time	17.9	29.7
9	<i>Mi Vida sin Ti</i>	América Televisión	Del Barrio Producciones	Telenovela / Melodrama	40	Prime Time	16.1	25.3
10	<i>La Otra Orilla</i>	América Televisión	Del Barrio Producciones	Telenovela / Melodrama	40	Prime Time	15.8	24.4

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

There are several aspects to point out in Table 4. First, there is a preference for Peruvian fictions over foreign fictions, represented by only one Mexican title. It is worth remembering that Mexico is the country that has had more premiere fictions in Peru in 2020, although not all of them have made it into this top ten. These ten fictions have all been broadcasted by América Televisión, the leading network in terms of audience ratings. Despite the fact that the latter is the most watched genre according to rating and share figures, there is a notorious predilection for melodrama over comedy. In conclusion, also strengthening what was indicated in section 1, it is noted that the figures for these 10 most watched titles have experienced a slight drop when compared to the rating and share reached up to 2019.

Table 4A. The ten most watched national titles in open TV

Title		Channel	Producer	Format /Genre	N. of chap./ep . (2020)	Time slot	Rating	Share
1	<i>Los Vilches 2</i>	América Televisión	ProTV	Telenovela / Melodrama	68	Prime Time	21.4	31.6
2	<i>Chapa tu Combi</i>	América Televisión	Del Barrio Producciones	Telenovela / Melodrama	45	Prime Time	20.3	31.0
3	<i>Dos Hermanas</i>	América Televisión	Del Barrio Producciones	Telenovela / Melodrama	12	Prime Time	19.9	29.3
4	<i>De Vuelta al Barrio</i>	América Televisión	América Televisión	Soap Opera / Comedy	68	Prime Time	19.0	30.2
5	<i>La Rosa de Guadalupe Perú</i>	América Televisión	América Televisión	Series / Melodrama	20	Prime Time	18.6	26.2
6	<i>Te Volveré a Encontrar</i>	América Televisión	ProTV	Telenovela / Melodrama	120	Prime Time	18.0	27.2
7	<i>Princesas</i>	América Televisión	ProTV	Telenovela / Melodrama	22	Prime Time	17.9	29.7
8	<i>Mi Vida sin Ti</i>	América Televisión	Del Barrio Producciones	Telenovela / Melodrama	40	Prime Time	16.1	25.3
9	<i>La Otra Orilla</i>	América Televisión	Del Barrio Producciones	Telenovela / Melodrama	40	Prime Time	15.8	24.4
10	<i>Yo perdí el Corazón</i>	América Televisión	Tercer Ojo Producciones	Miniseries / Melodrama	4	Night	3.4	13.8

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

While this table is quite similar to the previous one, as it only lists Peruvian premiere titles, here we find in 10th place *Yo Perdí el Corazón*, the only fiction that was not produced by one of the main fiction production companies that work mostly with América Televisión. The broadcasting schedule is an additional point to consider, since it was broadcasted outside prime time, starting at 00:00 hours once a week, as opposed to the daily frequency to which Peruvian viewers are accustomed, fact that also contributes to its low rating and share figures compared to other fictions.

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

	Titles	Network	Genre %		Socioeconomic level %		
			Women	Men	AB	C	DE
1	<i>Los Vilchez 2</i>	América Televisión	62.5	37.5	16.2	46.1	37.7
2	<i>Chapa tu Combi</i>	América Televisión	63.7	36.3	18.5	42.3	39.1
3	<i>Dos Hermanas</i>	América Televisión	64.5	35.5	18.3	43.8	38.0
4	<i>De Vuelta al Barrio</i>	América Televisión	61.5	38.5	18.0	47.5	34.5
5	<i>La Rosa de Guadalupe Perú</i>	América Televisión	60.8	39.2	12.8	47.4	39.8
6	<i>Te volveré a Encontrar</i>	América Televisión	60.6	39.4	15.4	47.1	37.5
7	<i>La Rosa de Guadalupe</i>	América Televisión	63.8	36.2	15.8	46.2	38.1
8	<i>Princesas</i>	América Televisión	62.3	37.7	17.2	47.8	35.1
9	<i>Mi Vida sin Ti</i>	América Televisión	62.6	37.4	16.5	49.3	34.2
10	<i>La Otra Orilla</i>	América Televisión	62.8	37.2	15.3	45.3	39.5

	Titles	Network	Age groups %					
			3 to 10	11 to 17	18 to 25	26 to 37	38 to 49	50- 99
1	<i>Los Vilchez 2</i>	América Televisión	13.4	15.3	12.9	21.9	16.3	20.2
2	<i>Chapa tu Combi</i>	América Televisión	12.9	14.5	12.3	22.5	17.3	20.6
3	<i>Dos Hermanas</i>	América Televisión	11.3	14.2	13.5	20.6	18.1	22.5
4	<i>De Vuelta al Barrio</i>	América Televisión	15.2	15.3	12.0	18.9	16.8	21.8
5	<i>La Rosa de Guadalupe Perú</i>	América Televisión	11.4	12.5	13.5	22.5	18.5	21.7
6	<i>Te Volveré a Encontrar</i>	América Televisión	12.9	12.2	11.8	23.8	17.7	21.5
7	<i>La Rosa de Guadalupe</i>	América Televisión	14.8	14.4	11.5	19.8	15.4	24.0
8	<i>Princesas</i>	América Televisión	14.7	13.9	12.6	19.5	16.9	22.4
9	<i>Mi Vida sin Ti</i>	América Televisión	11.5	12.5	12.3	21.6	17.7	24.4
10	<i>La Otra Orilla</i>	América Televisión	14.0	16.8	10.1	21.1	16.3	21.7

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

These last tables, which display gender, socioeconomic level and age breakdowns, have shown few surprises with respect to the target audience for Peruvian television stations in general. In the first case, the idea that Peruvian television is mainly thinking about women and socioeconomic level C and DE with its fictions is confirmed. All the most watched fictions have adapted to respond to this segmentation quite correctly. There have been no cases, such as in 2019, where gender composition or socioeconomic level show a redistribution among the 10 titles with the highest ratings.

Ultimately and based on the last table, we can say that the *top ten* Peruvian fictions are mostly consumed by viewers aged

26 and older, specially by viewers between 26 and 37, and 50 and 99 years old. The last two ranges interchange their leadership between titles, but it tends to be the older age range that has a slight preponderance. The age groups under 25 years old probably focus their interest increasingly on fiction in other sources with more diverse contents, such as those offered by VoD platforms.

3. 2020 VoD Monitoring

During 2020, international audiovisual content platforms such as Netflix, Prime Video, etc., strengthened their presence and were able to meet the demand that arose during this period. It was not the same for local television platforms, whose production is minimal compared to their international counterparts.

3.1. VoD platforms market

América TVGO, the leading Peruvian VoD platform in the country, has not yet generated competitive revenues like broadcasting. As Éric Jürgensen, former CEO of América Televisión, stated, “we know we have to be present and it is a complement to traditional TV, but it is a world that does not generate money for now. Currently, total digital revenue represents between 2% and 4% of the total TV channels revenue.”⁶ This may be partially because open television continues to be the main means of communication in our country, but also because local platform offer is limited. It is

6 Source: <https://www.produ.com/noticias/ingreso-digital-epresenta-solo-entre-el-2-y-el-4-total-de-los-ingresos-de-los-canales-de-tv-eric-jurgensen-de-america-tv?fbclid=IwAR0YC-nX1XdPBgg6vdDMOSTRExLOdtodJqx8OfQRqjOeXXiKyz92gDYLIU>

not yet possible to appreciate a differential advantage, besides the cost to fully access its contents. Local value can be, perhaps, a factor to exploit in the case of Peruvian platforms in order to find that differential advantage over foreign platforms. As of 2019, Movistar Play, which depends on a cable channel, has started to produce local content in Peru. However, these are fictions with limited titles and few chapters.

The opposite happened with VoD from international platforms. According to a study conducted by Sherlock Communications, “22% of Peruvians use four or more streaming services. Moreover, during the COVID-19 pandemic, 83% of surveyed users subscribed to a video platform.”⁷ This scenario places our country and Mexico above the regional average, with 2 subscriptions. Similarly, Digital TV Research changed its projections for VoD platform subscription growth in the region in early 2020: “In March, (...) it was estimated that streaming subscriptions in Latin America would increase from 42 million at the end of 2019 to 81 million in 2025. In September, that projection was adjusted to 100.3 million over the same five-year period.”⁸

7 Source: <https://andina.pe/agencia/noticia-el-22-peruanos-usa-cuatro-servicios-streaming-video-segun-estudio-822489.aspx>

8 Source: <https://gestion.pe/economia/el-83-de-peruanos-contrato-su-primer-servicio-de-streaming-este-ano-afirma-estudio-nndc-noticia/?ref=gesr>

3.2. VoD analysis in 2020: national and Ibero-American premiere fiction

Table 6. National and Ibero-American fictions shown in 2020 on VoD systems

PREMIERE NATIONAL TITLES	PREMIERE IBERO-AMERICAN TITLES	CO-PRODUCTIONS
<p>Movistar Play – 2 national titles</p> <ol style="list-style-type: none"> 1. <i>Aislados – La Serie</i> (series) 2. <i>Raúl con Soledad</i> (series) <p>América TVGO – 1 national title</p> <ol style="list-style-type: none"> 3. <i>Papá en Cuarentena</i> (series) 	<p>Netflix – 33 Ibero-American titles</p> <ol style="list-style-type: none"> 1. <i>Oscuro Deseo</i> (series - Mexico) 2. <i>Historia de un Crimen: La Búsqueda</i> (miniseries - Mexico) 3. <i>El Robo del Siglo</i> (miniseries - Colombia) 4. <i>Control Z</i> (series - Mexico) 5. <i>Chichipatos</i> (series - Colombia) 6. <i>Omnisciente</i> (series - Brazil) 7. <i>Coisa Mais Linda</i> (series - Brazil) 8. <i>Desenfrenadas</i> (series - Mexico) 9. <i>Amar y Vivir</i> (series - Colombia) 10. <i>La Venganza de Analía</i> (series - Colombia) 11. <i>El Dragón: El Regreso de un Guerrero</i> (telenovela - Mexico) 12. <i>La Casa de las Flores - season 3</i> (series – Mexico) 13. <i>Narcos: México</i> (series – Mexico) 14. <i>El Desorden que Dejas</i> (miniseries - Spain) 15. <i>100 Días para Enamorarnos</i> (telenovela - USA) 16. <i>Enemigo Íntimo</i> (series – Mexico) 17. <i>Vis a Vis: El Oasis</i> (series - Spain) 	<p>Netflix – 2 titles</p> <ol style="list-style-type: none"> 1. <i>Alguien Tiene que Morir</i> (miniseries – Spain, Mexico) 2. <i>Selena: La Serie</i> (series – USA, Mexico)

PREMIERE NATIONAL TITLES	PREMIERE IBERO-AMERICAN TITLES	CO-PRODUCTIONS
	18. <i>La Valla</i> (series - Spain) 19. <i>El Reto del Beso</i> (series - Brazil) 20. <i>No Te Puedes Esconder</i> (series - USA) 21. <i>Reality Z</i> (series - Brazil) 22. <i>Buenos Días Verónica</i> (series - Brazil) 23. <i>La Reina de las Indias y el Conquistador</i> (series - Colombia) 24. <i>Los Favoritos de Midas</i> (miniseries - Spain) 25. <i>Perdida</i> (series - Spain) 26. <i>Valeria</i> (series - Spain) 27. <i>Vivir Sin Permiso - season 2</i> (series - Spain) 28. <i>Las Chicas del Cable – temporada 5</i> (series - Spain) 29. <i>Alta Mar – temporada 3</i> (series - Spain) 30. <i>Toy Boy</i> (series - Spain) 31. <i>Casi Feliz</i> (series - Argentina) 32. <i>Puerta 7</i> (series - Argentina) 33. <i>Siempre Bruja</i> (series - Colombia) Prime Video – 3 Ibero-American titles 34. <i>De Brutus, Nada</i> (series - Mexico) 35. <i>Backdoor</i> (series - Mexico) 36. <i>Pequeñas Coincidencias</i> (series - Spain)	
Total: 3	Total: 36	Total: 2
GENERAL TOTAL 41		

Source: Observatorio Audiovisual Peruano (OAP)

Like 2019, three Peruvian titles premiered on VoD in 2020. This time, not all of them are from Movistar Play, but America TVGO also contributes.

On the other hand, it is worth noting that Ibero-American premiere titles have seen their total number reduced from 41 in 2019 to 36. This drop is directly related to the general slowdown in audiovisual activities, in general, due to the pandemic. Argentina and Brazil saw their numbers reduced to less than half, and another country with a slight decline was Spain, which cut its production by two to reach only 11 premieres.

Table 7. VoD Prime fiction in 2020: origin countries

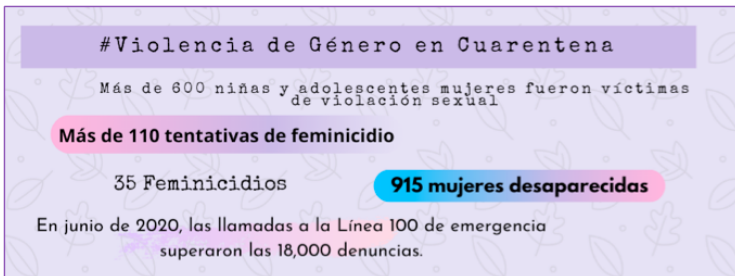
Country	Titles	%
NATIONAL (total)	3	7.32
OBITEL COUNTRIES (total)	36	87.80
Argentina	2	4.88
Brazil	5	12.20
Chile	0	0
Colombia	6	0
Ecuador	0	0
Spain	11	26.83
USA (Hispanic production)	2	4.88
Mexico	10	24.39
Peru	3	7.32
Portugal	0	0
Uruguay	0	0
Venezuela	0	0
CO-PRODUCTIONS (total)	2	4.88
Peruvian Co-productions	0	0
Obitel countries Co-productions	2	4.88
GRAND TOTAL	41	100.00

Source: Observatorio Audiovisual Peruano (OAP)

On the other hand, Colombia and Mexico showed a recovery in relation to the number of titles, the former reaching six premieres in 2020, while Mexico released ten titles. It is still uncertain how 2021 will recompose, considering that the audiovisual sector will be reactivated, although with economic conditions that the pandemic has left on channels, production companies and platforms.

4. Fiction and audience participation in digital platforms.

As it was mentioned in last year's yearbook (Cassano, Dettleff, & Vásquez, 2020), gender-based violence is a daunting reality that devastates the country. Only during the mandatory quarantine due to the COVID-19 pandemic, more than 900 women went missing, 35 femicides were committed and more than 600 young and teenage girls were victims of sexual violence.



Sources: <https://violentadasencuarentena.distintaslatitudes.net/portfolio/peru/> and El Comercio⁹ Own elaboration.

⁹ <https://elcomercio.pe/lima/sucesos/cinco-menores-son-violadas-cada-dia-desde-que-empezo-el-estado-de-emergencia-violencia-contra-la-mujer-mimp-noticia/>

As can be seen, Peruvian women have been victims of violence, and most of these acts of violence have occurred within their homes. What Rita Segato describes as “expressive violence” can be recognized in these facts, where women function as a canvas, as a frame and as a territory to establish the terms of a particular dispute (Segato, 2014).

These data also show the presence of a “rape culture” (Segato, 2003) that results from the construction of masculinity as a “mandate”. This mandate is the one which lies at the root of all violence exercised against women and other population groups (especially LGTBIQ+ and children). Gender-based violence expressed in such a way is an act of regulation of female bodies, a disciplinary and vengeful act against a woman generically approached. An act backed by the mandate to punish and remove a woman’s vitality perceived as defying and abandoning her destined position in the status system of traditional morality (Cavieres and Salinas, 1991).

This reality has been captured by national fiction in recent years¹⁰ -*Valiente Amor* (2016), *Mujercitas* (2017), *Ojitos Hechiceros* (2018), *En la Piel de Alicia* (2019). In 2020, the *telenovela* *Mi Vida sin Ti* (2020) produced by Del Barrio Producciones took the theme as the story’s main topic, exposing the diverse manifestations of gender-based violence against women -psychological, physical, symbolic, economic- and showing the different situations, in which it manifests itself. The love story of Amanda and Santiago shed light on different expressions of gender-based violence.

10 Peruvian chapters of previous yearbooks can be reviewed..



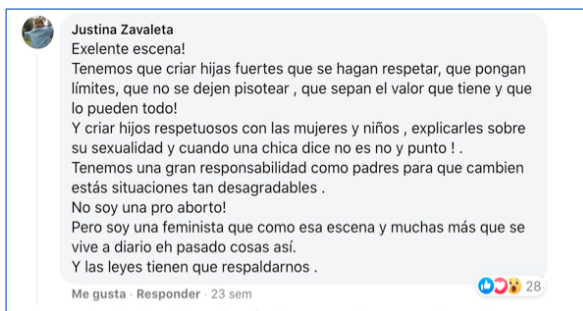
Source: Del Barrio Producciones 2020

This story prompted discussion in social media, active participation of the actresses and actors making live presentations in different media to raise awareness about attitudes, practices and ideas that are normalized in our society. One of the first situations that triggered dialogue and discussion in media was caused when Enrique's character touches Olenka's body without her consent. And Olenka responds to him.



Source: Facebook Del Barrio producciones October 20th, 2020.

This scene was shared more than 400 times on Facebook and 300 times on Instagram. Many of the comments revolved around the need to raise daughters and sons with a sense of respect and care for female bodies integrity, and especially to respect women's voices when they say NO.



Source: Facebook Del Barrio Producciones October 21st, 2020.

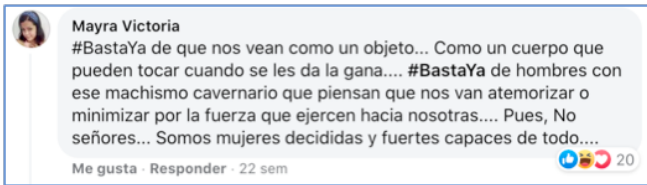
Also, this scene was central to the story because the situation represented is the same experienced by women of any age, social class, cultural or ethnic group in the country; therefore, it also evoked diverse emotions and allowed to share experiences and different forms of resilience. Actress Daniela Feijóo -who plays Olenka in the fiction- stated “I felt that it was an important scene, and that at that moment, Olenka represented the voices of thousands of women who have to struggle with this despicable reality”¹¹

11 Full access to the video in: <https://www.facebook.com/DelBarrioPro/posts/3308323652537851>



Source: Facebook Del Barrio Producciones October 20th, 2020.

Daniela Feijoó's reflection also makes a call to stop tolerating this: "indignation, anger, rage, but at the same time a lot of strength to confront ourselves and no longer tolerate it...enough is enough"¹²



Source: Facebook Del Barrio Producciones October 20th, 2020.

In fact, the hashtag #BastaYa (#StopItNow) was frequently shared on social media while the *telenovela* was broadcasted.

12 Ibidem.

Another moment of great tension and social dialogue happened when Enrique beats Amanda because she asks for an explanation for Enrique's refusal to let her daughter Camila study¹³.



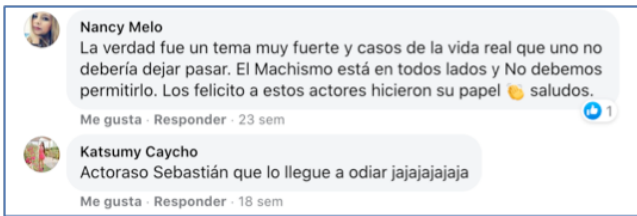
Source: Facebook Del Barrio Producciones October 26th, 2020.

This scene was reproduced on Facebook more than 12,000 times and enabled an open dialogue on gender-based violence against women; many comments from the audience raised similar situations experienced by themselves or acquaintances, proposed possible solutions, and also discussed the responsibilities of women and men in these situations of violence. In most cases, the digital platform became a supportive space for the voices that shared

13 The scene can be seen in the following link: <https://www.facebook.com/DelBarrio-Pro/posts/331397087197312>

their experiences. Although it is also worth noting that there was no shortage of sexist comments, blaming women for the violence they suffer.

A third significant moment of the fiction occurred when the actors Sebastián Monteghirfo and Diego Pérez made a media presentation pondering on the negative actions performed by their respective fictional characters¹⁴; this was an important exercise because both actors called into question practices and ideas naturalized by many men and women who see female bodies as a field of dispute.



Source: Facebook Del Barrio Producciones October 26th, 2020.

Although violence against women is not new, what is new is the social concern for women who suffer physical, sexual and psychological aggression in the family, work and educational environments. Nowadays, the assessment of violence as something negative, in any of its expressions within social life, is increasingly becoming more generalized, and Peruvian television fiction is making a significant contribution to this visibility and awareness.

14 Full video the actors can be seen in: <https://www.facebook.com/DelBarrioPro/posts/3287838971252986>

5. Highlights of the year

The worldwide sanitary emergency generated by COVID-19 affected Peru in a very dramatic manner, making it the country with the highest death rate in the world in relation to its population. Unable to produce other types of programs due to sanitary restrictions, television channels' first response was to cover their screens with news and information about the disease and the measures adopted by the government. It became frequent that President Vizcarra held a press conference informing about the country's situation and announcing containment measures. Several entertainment programs began to return to regular programming but changing their content towards news and social assistance.

Compulsory lockdown led the government to look for alternatives so students could receive distance education, creating the project *Aprendo en Casa* to be broadcasted by radio and television. However, private broadcasting companies did not adhere to this initiative, and only offered one or two hours of programming per day after several days of negotiations with the government. Only State broadcasters and local radio broadcasting companies dedicated different schedules to broadcasting remote classes, and television became schooling source for 46% of Peruvians in 2020.

América Televisión, the main national fiction station, ended the broadcasting of its *telenovelas* in prime time *Los Vilchez 2* and *Chapa tu Combi* in March, but its other productions of the year had to be cancelled or postponed. The same day that the mandatory confinement was announced, Del Barrio Producciones informed the suspension of the shooting of its *telenovela Dos Hermanas*, and

a few days later it was announced that the show would stop airing, after broadcasting only seven episodes. The fourth season of América Televisión's soap opera *De Vuelta al Barrio* had to be postponed until September.

There were some individual efforts to produce fiction and distribute it in other media during the mandatory confinement. Television producer Marco Moscoso premiered his fiction *Angustia* in May, which tells the attempts made by a group to find an elderly man who escapes from a nursing home in the middle of the lockdown. In the same month *Miitin* was released, a 12-episode comedy web series directed by Daniel Rodríguez -director of the successful *Aj Zombies*¹⁵- which focuses on the problems of teleworking. Another production was *Aislados*, which premiered at the end of November through Movistar Play. This 10-episode series directed by Gino Tassara mixes police drama with political corruption issues, in the midst of pandemic times, as indicated in section 1.2.

New TV fiction production only started in July, and in August *La Otra Orilla* was premiered, a production that directly addressed the health emergency situation, and later on *Mi Vida sin Ti* - in addition to the already mentioned *De Vuelta al Barrio*- which will be discussed in the following section. To compensate the lack of fiction in prime time (a slot dedicated by América Televisión to national fiction), the network broadcasted *Te Volveré a Encontrar*, a *telenovela* produced in 2017, to which the actors' interventions were added at the end of the chapters, reflecting on the pandemic, and ending with "Let's go back to a better world", a phrase used by the network for several months. But this was not the only fiction recovered by the channel from its archives. *O Besas o no Besas* and *Yo Perdí el Corazón* are two fictions produced by América

15 See yearbooks 2015 and 2018

Televisión, which should have premiered in 2014 and 2015, and for different reasons were not broadcasted on the open signal. The network later released them on its pay platform América TVGO in 2018¹⁶, but in 2020 they were broadcasted on the open signal, although not in prime time. This shows the need to have fiction in the programming grid, a type of story that resonates quite well with Peruvian audiences, but which has the most serious limitations to be produced.

The first months of mandatory lockdown led a considerable part of the population to watch television as an information or entertainment source, and as a result, the consumption of this media increased by 42%, the highest growth in Latin America, according to Kantar Ibope Media data. During the following months, however, with health measures that were still in force, the economic crisis, and a feeling of weariness among the population, consumption decreased until it stabilized in the last months of the year. Informative programs began to recede in terms of presence on Peruvian television screens, and that led to search how to generate fiction products in the midst of sanitary restrictions. The following section deals with this issue.

6. Theme of the year: Fiction in times of pandemic

In the first months of 2020 the world was shocked by images of the effects of COVID-19; the world became an uncertain place starting in China, then Europe and finally in America. On March 11, 2020, the World Health Organization (WHO) declared the disease outbreak as a global pandemic, which meant confine-

16 See yearbook 2019

ments, extreme care and border closures. Life as we knew it was changing before our eyes.

In Latin America, the global pandemic of COVID-19 has exposed right-wing and left-wing populism, with a lack of seriousness in handling the pandemic; as well as the fragility of our nations, with structural absences and persistent inequalities that have led to dramatic situations. The number of cases in Peru at the time of writing this chapter¹⁷ is close to 1'980,000, with an official death toll of over 187,000. The SINADEF¹⁸ data on excess deaths speaks of more than 100,000 deaths in one year of pandemic.

In this context, the Peruvian audiovisual industry came to an abrupt halt, tracking what was happening around the world. However, living in confinement and lockdown exponentially increased television and audiovisual productions consumption on different screens and platforms, in addition to social media use. There was not only a need for information on the new disease, but mainly for fiction, entertainment productions and educational content. Faced with the impossibility of keeping schools open, television and radio became the only possibility to share educational material in our country.

As indicated in previous sections, at the beginning of quarantine and social isolation there were some audiovisual production experiences, which were based on the will of filmmakers to join forces at a critical moment. Nevertheless, these efforts were not enough, and being their own fiction their most important audience source, América Televisión and Del Barrio

17 July 2021

18 Peruvian National System of Deceases

Producciones bet on making their first audiovisual project in the midst of the pandemic.

On June 3rd, 2020 *La Otra Orilla*, the first fiction produced in pandemic in Peru was premiered on América Televisión. Strict protocols were established for this project, with molecular testing of the entire artistic and technical team, few characters on stage and a very small shooting team. *La Otra Orilla* produced by Del Barrio Producciones, with script by Rita Solf, tells the story of five characters from the pandemic's first line: a street sweeper -Magda-, a policeman -Sergio-, a nurse -Gloria-, a journalist -Pati-, and a schoolteacher -Pablo.



Source: América televisión

The story was told from the characters' intertwining in the pandemic's "New Normal", and depicted the fears, apprehensions, but also the dreams, desires, and the resilience of a society with strong inequalities. Many of the scenes had to be shot in open spaces, with very few characters and several shooting teams work-

ing simultaneously. Some situations held up quite well with these demands, while others not so much. For example, the dramatic line of Gloria -the nurse-, was affected by the requirement of not having more than two characters on stage, relying in many situations on the character's monologues, which ended up affecting the dramaturgy of that story.

Despite the difficulties in moving the project forward, one of the virtues of *La Otra Orilla* was the melodramatic handling of Pati's (journalist) and Sergio's (policeman) stories, which was a creative challenge for the directors in itself. The kiss between them was one of the moments that generated the greatest surprise in the audience, due to the requirement of social distancing.



Source: *Del Barrio Producciones 2020*

An important moment, because this kiss also symbolizes future and hope for a return to life as we knew it in the midst of a time of social distancing.

The new reality and its demands made it necessary to re-think production costs -as these were increasing in the pandemic context¹⁹- times and contents, in many cases betting on shorter products, with fewer characters and locations. Johanna Lombardi - director of Fiction Latin America of Telefónica Media Networks - said in August 2020²⁰ that the hardest part “was the uncertainty about the future during the confinement” and further specified that the other major problem for fiction production was that there was no insurance company to cover costs due to COVID-19. In the case of Telefónica Media Networks, the company decided to invest its time in developing scripts.

Mi Vida sin Ti, the second *telenovela* produced by Del Barrio Producciones in pandemic, was premiered during prime time on América Televisión on October 5th, 2020. Security protocols for this production included -besides those mentioned for *La Otra Orilla*- isolating the entire artistic and technical team in a hotel in the city during the months of filming. The crew was transported each day from the hotel to the location, then returned to the hotel after filming the different scenes. Confinement of around 80 people made it possible to create an audiovisual product with several plot lines, more actors on stage, intimate scenes, and the dramaturgical development of the story was not affected by the health conditions.

Audiovisual production, especially television, is more than ever a cultural industry that dialogues intimately with our deepest roots, a haven against uncertainty, a companion in confinement and a central element to experience our new everyday life. A cul-

19 PRODU Webinar *Desarrollo y producción de series en pandemia*. Made on August 12th, 2020. In: <https://www.produ.com/webinars/tv/produ-webinar-desarrollo-y-produccion-de-series-en-pandemia>

20 *Ibidem*

tural industry that operates in a complex scenario of transit and coexistence between traditional television (broadcast) and second or third screens (streaming), plus the different digital possibilities that the Internet offers nowadays. In this regard, Argentine writer Federico Mordkowicz's words make sense when he reminds us that "formats and media may change, but the need to tell and consume stories will continue because it is in our DNA". And the pandemic reminded us of this violently.

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9

PORTUGAL:

EUROPEAN DIRECTIVE “AUDIOVISUAL MEDIA SERVICES”: THE BEGINNING OF THE END FOR TELENOVELA MONISM?¹

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Introduction

This year was unequivocally marked by the SARS-CoV-2 pandemic and, consequently, by the way in which lockdowns precipitated a trend in the Portuguese media consumption that had already become clear: the adoption of streaming services and a significant increase in the time devoted to entertainment and content not found on traditional free-to-air (FTA) broadcasters. And, while these video on demand services have become commonplace among younger, urban and educated view-

1 The Portuguese team would like to thank CAEM, GfK and Markttest-MediaMonitor for its cooperation in gathering and processing the necessary data.

ers, the changes in social practices during 2020 widened their reach to other audiences searching for their offering, especially fiction. This was evidenced by the increase in fanbase for many titles, earning them the status of culturally relevant objects. At the same time, with the enactment of the European Directive “Audiovisual Media Services” into national law, the way seems to be paved for the increased demand in media content by other platforms and, consequently, for the production of alternative formats to the telenovela on a larger scale, thus contributing to a more varied marketplace closely following the trend shown by Portuguese audiences.

1. The Audiovisual Context of Portugal in 2020

1.1 Broadcast television in Portugal

Chart 1. National TV Networks/broadcast television channels in Portugal

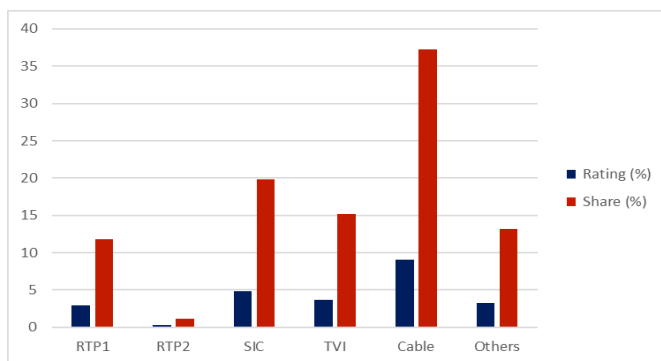
Private networks/channels (2)	Public networks/channels (4+1)
SIC	RTP1
TVI	RTP2
	RTP3
	RTP Memória
	Canal Parlamento
TOTAL NETWORKS =3	
TOTAL CHANNELS = 7	

Source: Obitel Portugal

Graph 1. Rating and share by TV station (generalist)

Channel	Rating (%)	Share (%)
RTP1	2,9	11,8
RTP2	0,3	1,1
SIC	4,8	19,8
TVI	3,7	15,2
Cable	9	37,2
Others	3,2	13,2
TOTAL		

Source: *Obitel Portugal / Marktest MediaMonitor*



While television consumption increased 22%² from 2019 into the first semester of 2020, the numbers began to decline by Summer. Still, the year ended with an 18%³ increase in viewership, mostly in the

2 Meios e Publicidade. Retrieved on April 29, 2021 <https://www.meiosepublicidade.pt/2020/07/audiencias-tv-consumo-cresceu-22-no-primeiro-semester-ja-recouou-8-junho/>

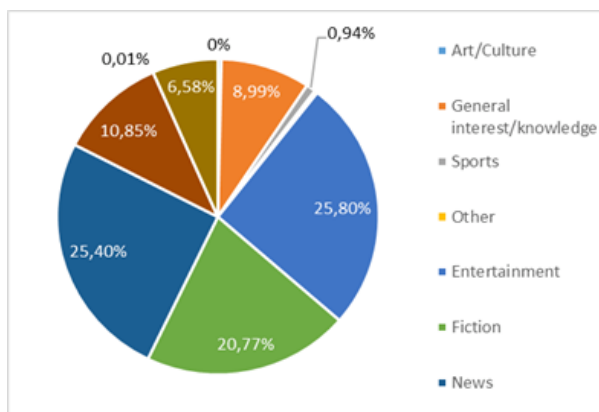
3 Meios e Publicidade. Retrieved on April 29, 2021 <https://www.meiosepublicidade.pt/2021/01/audiencias-tv-2020-consumo-cresce-18-ano-pandemia-share-da-sic-sobe-rtv1-descem-face-2019/>

“others” category - alternative screen usage and streaming. Regarding the latter, there were an estimated 800.000 new subscriptions of entertainment services between February and April, 2020⁴, namely Netflix and HBO Portugal. Inversely, the subscription-based television channels saw their viewership decline. The private broadcaster SIC, which leads the charts since 2019, was the only network to show a slight increase from the previous year (+0,6%) while TVI and the public channels saw lower numbers from 2019.

Graph 2: TV genres and broadcast programming hours - % (Generalist channels)

Genres broadcasts	Hours of broadcasting	%
Art/Culture	108:34:44	0,35%
General interest/knowledge	2772:20:42	8,99%
Sports	291:50:35	0,94%
Other	98:41:28	0,31%
Entertainment	7956:08:01	25,80%
Fiction	6405:38:59	20,77%
News	7834:35:28	25,40%
Young audiences	3344:15:29	10,85%
Others	2:25:21	0,01%
Advertisement	2026:30:24	6,58%
Total	30841:01:11	100%

4 Marktest. Retrieved on April 20, 2021. <https://www.marktest.com/wap/a/n/id-262d.aspx>



Source: Obitel Portugal / Marktest MediaMonitor

The effects of the pandemic caused by the SARS-CoV-2 virus, namely the lockdown periods, led to an increase in the demand for media content while impacting productivity. Therefore, in 2020 there was an increase in the total number of hours broadcast by free to air generalist channels, particularly due to the added offering of news (+12% and entertainment (+10%) programmes. Due to directing/production requirements and their specificity, the e-sports and fiction genres were the most affected, with the former showing nearly a 60% drop from the previous year and a 4,2% drop for the latter. In terms of advertisement, even though there was a decrease in investment, the free-to-air generalist channels increased their total number of advertisement hours by nearly 4% from 2019.

1.2. Paid TV and VoD Platforms in Portugal

According to the data, and going against the trend in previous years, the offering by paid channels saw a share decrease of 5,5% from 2019, which represents 37,2% of the total audience share in 2020. Among these, the channel CMTV maintained its lead with 4,2%, followed by Globo and SIC Notícias, with a share of 2,3% and 2,2% respectively. This decrease is connected to the increase in viewership of non-audited channels and the use of television for other services such as streaming and console gaming, which registered a share of 13,2%, growing 1,4% from the previous year. According to data provided by the National Communications Authority (ANACOM), the number of television subscriptions in 2020 grew 4% from the previous year.

As for providers of this type of service in Portugal, MEO took over the lead from NOS, its direct competitor and the leader in previous years (40% vs. 39%). Providers VODAFONE and NOWO remain in third and fourth place with 17,3% and 3,9% of all subscribers respectively.

Regarding fibre, it grew 4,9% from 2019 and remained as the technology with the largest number of subscribers, now representing over 50% (51,6%) of all clients of subscription-based television offering.

Chart 2. Pay TV networks in Portugal

Outstanding Pay TV networks in 2020
1) CMTV (Generalist), 2) Globo (Generalist), 3) SIC Notícias (News), 4) Hollywood (Fiction), 5) FOX (Fiction), 6) TVI 24 (News), 7) Disney Channel (Children), 8) Cartoon Network (Children), 9) FOX Movies Portugal (Fiction), 10) FOX Life (Fiction))
TOTAL: 10 news networks

Table 2 shows the TOP 10 of paid television channels, dominated by fiction channels (4) and an equal offering (2) of generalist, news and children’s channels. Throughout 2020, none of these channels premièred national fiction.

Chart 3. VoD in Portugal

Top 10 VoD platforms active in 2020	Total
Netflix, Prime Video (Amazon), Disney+ (The Walt Disney Company), HBO Portugal (WarnerMedia), Apple TV+ (Apple), RTP Play (RTP), TVI Player (TVI), OPTO (SIC), Mubi, Filmin, NOS Play	10
TOTAL	10

Source: Obitel Portugal

Table 3 shows the main VoD platforms in Portugal, not including official Youtube channels from any type of broadcaster. According to the European Audiovisual Observatory (EAO)⁵, six of the presented platforms have the largest presence across the 28 countries in the European Union - Netflix, Prime Video, Disney +, HBO, Apple TV+ and Mubi - the remaining platforms being associated to national open signal television channels (RTP Play, TVI Player and OPTO). Of the aforementioned platforms, only two offer a free subscription service - RTP Play and TVI Player, the latter being paid for international users - and the remaining 9 are paid subscription services.

5 European Audiovisual Observatory Retrieved on April 12, 2021 <https://rm.coe.int/trends-in-the-vod-market-in-eu28-final-version/1680a1511a>

1.3. Independent television fiction production companies

The independent production market is small due to the number of TV stations airing national fiction. Only recently, with the development of a co-production system that pre-empted the European directive, has it been possible to gain some visibility beyond borders in the series format. The discussion of the European Directive “Audiovisual Media Services” in Brussels and its subsequent enactment into national law has led subscription channels and streaming platforms alike to react on it. However, on a year marked by the pandemic, several productions had to be delayed.

The sphere in which these independent production companies operate is composed by multinational ventures and small and medium-sized local producers, all acting in accordance to their specialized production segments. Having no significant attachment to television channels, independent producers focusing on fiction are required to sign contract orders where they give away their intellectual property rights to broadcasters. An exception to this are works supported by the Instituto do Cinema e do Audiovisual (ICA).

This public institution financially backs independent producers in three stages: writing and development, demonstration support and production. In the latter, producers are required to have already established a contract with a national broadcaster committing to air and finance the project, even if in a minority stake. Therefore, for projects to be developed, production companies find themselves dependant on a client and its own interest right from the start.

1.4. Sources of funding for the audiovisual sector

The support by Instituto do Cinema e do Audiovisual (ICA) identified above has been granted to audiovisual and media

production since 2014. Up until that year, only cinema was eligible to benefit from government support. Even so, the distribution remains uneven (apart from other financing, 20% of the financing overall is afforded to audiovisual and 80% to cinema). The new television law (*Lei da Televisão e dos Serviços Audiovisuais a Pedido*, Lei 74/2020) bolsters these supports by requiring streaming platforms to pay a tax corresponding to 1% of their relevant profits, which is to be afforded by ICA through annual tenders, as well as the requirement that streaming platforms invest 4 million Euro in Portuguese-speaking productions. Still under the institutional scope, the MEDIA (Europa Criativa) stands out as a programme supporting the cultural and creative sector in the European Union and the IBERMEDIA is an incentive programme for the development of feature films and fiction in the Iberian-American space. There is also the legal requirement for the public network RTP to invest directly in independent cinema and media production on an annual basis through tenders and, consequently, to the production and broadcast of nationally produced series and mini-series. Soft sponsoring/product placement is another source of income which has been identified in recent years as a growing resource for broadcasters, whether in entertainment programmes or in fiction. For the past five years, the brands’ return on investment increased from 471 million Euro to 862,9 million Euro⁶. Apart from financially contributing towards production, this practice mitigates viewership behaviour patterns such as zapping during ad breaks. In 2020 this strategy had no significant impact over investment in fiction, since there was no increase either in production hours or in prices.

6 Meios e Publicidade. Retrieved on April 18, 2021 <https://www.meiosepublicidade.pt/2020/02/os-canais-programas-captam-investimento-soft-sponsoring-portugal/>

1.5. Communication Policies

2020 was marked by the enactment into national law of the European Directive “Audiovisual Media Services”. The directive, which was approved in 2018 by the European Parliament and the European Council, was passed into national law in October 2020 and approved by the Portuguese President in November. It aims to regulate the audiovisual media service offering among Member States, including subscription channels, video sharing platforms and Video on Demand services. Up until now, these content production and distributing entities not based in Portugal weren’t required to contribute nor to the development or the distribution of European and national works. Even though the transition process stirred some controversy among television and audiovisual professionals due to differing interpretations on the conditions, an agreement was reached on the terms, notably the following⁷: i) 1% tax payment of relevant revenue by on demand subscription-based audiovisual service operators and video sharing platforms; ii) Minimum quota of 30% of European works offered by on demand audiovisual services, ensuring a significant presence of these works in their catalogue and devoting at least half of this percentage to original Portuguese-speaking independent European creative works produced in the last five years. iii) investment requirement in cinema and audiovisual, as was already stipulated for television broadcasters.

It was also in 2020 that there was an European Parliament resolution on strengthening media freedom with the purpose of protecting journalists, dealing with hate speech, misinformation and the role of platforms in these. This was due to a technologized media eco-chamber that has led to the instalment of an infodemic environment with the increased spread of misinformation, a plight that has been ad-

7 Diário da República Eletrónico-Lei 74/2020. Retrieved on April 18, 2021 <https://dre.pt/home/-/dre/148963298/details/maximized>

dressed by the World Health Organization itself. Lastly, and following the impact of the Sars-Cov-2 pandemic, emphasis should be given to the governmental support of 15 million Euro to financial sectors and the media through a programme of pre-emptive acquisition of institutional advertisement, along with other lines of credit and support. The media public service also announced a support package for independent producers by foreseeing an added investment in audiovisual products and anticipating a content consultation (direct project reception).

1.6. Digital and mobile connectivity infrastructure

The Digital Economy and Society Index (DESI)⁸, published in June, 2020 by the European Union places Portugal in 19th place among the 28 Member States, particularly due to the uneven broadband coverage between rural and urban areas, the fact that 22% of the Portuguese population has never had internet access and the fact that the tech sector represents less than 3% of the Portuguese economy. This report, however, states that over 80% of the public administration services are available online and over 50% of families have internet access. Due to the impact of the Covid-19 pandemic in the digital transformation and considering how it may be vital for the economic and social recovery of the Member States after the pandemic, the resolution titled “Shaping Europe’s Digital Future” gained a new momentum and impact by identifying digital development as a crucial element in society.

According to Marktest’s Bareme 2020⁹, internet access by people over 15 years old only slightly increased from 2019 (+1%), mobile phones being the leading platform in terms of access growth across all demographics. On the other hand, the use of tablets stalled, with even a decreased use by the younger demographic.

8 Digital Economy and Society Index (DESI). Retrieved on April 18, 2021 <https://ec.europa.eu/digital-single-market/en/digital-economy-and-society-index-desi>

9 Bareme 2020. Retrieved on April 22, 2021 <https://www.marktest.com/wap/a/n/id~269e.aspx>

Lastly, and in line with the recovery measurements post-Covid-19, emphasis should be given to mobile 5G, a seemingly revolutionary technology which supports 1000 times the traffic of existing networks and a speed 10 to 20 times faster than 4G. Apart from these advancements, there are others impacting security, public health (e.g. remote monitoring) as well as applications in autonomous vehicles, smart cities or precision agriculture. As in other countries, the deadlock between the regulating body (ANACOM) and providers has contributed to the delay in implementing this technology. At the moment, the bidding for the attribution frequency usage rights are underway.

2. Analysis of the Year: National and Ibero-American Premiere Fiction on broadcast television

Table 1. Fiction aired in 2020 (national and imported; premiere, reprises and co-productions)

PREMIERE NATIONAL TITLES – 19
RTP1 – 5
1. <i>A Espia</i> (series)
2. <i>A Herdade</i> (mini-series)
3. <i>Crónica dos Bons Malandros</i> (series)
4. <i>O Atentado</i> (series)
5. <i>O Mundo não Acaba Assim</i> (series)
RTP2- 2
6. <i>A Rede</i> (series)
7. <i>Quarenteens</i> (series)
SIC – 7
8. <i>Esperança</i> (one-shot)
9. <i>Golpe de Sorte: a história da Maria do Céu</i> (tv film)
10. <i>Golpe de Sorte IV</i> (series)
11. <i>Nazaré</i> (telenovela)
12. <i>Nazaré: especial Natal</i> (mini-series)
13. <i>Patrões Fora</i> (sitcom)
14. <i>Terra Brava</i> (telenovela)

TVI – 5

15. *Ai a Minha Vida* (sitcom)
16. *Amar Demais* (telenovela)
17. *Bem me Quer* (telenovela)
18. *Na Corda Bamba* (telenovela)
19. *Quer o Destino* (telenovela)

PREMIERE IMPORTED TITLES – 4

SIC – 4

1. *A Dona do Pedaço* (telenovela)
2. *Amor de Mãe* (telenovela)
3. *Eta Mundo Bom!* (telenovela)
4. *Totalmente Demais* (telenovela)

RERUN TITLES – 63

RTP1 – 12

1. *3 Mulheres* (series)
2. *Bem-Vindos a Beirais* (long-running series)
3. *Conta-me como Foi* (series)
4. *Idiotas, ponto.* (series)
5. *Lua Vermelha* (series)
6. *Miúdo Graúdo* (series)
7. *O Nosso Cônsul em Havana* (series)
8. *O Sábio* (series)
9. *Solteira e Boa Rapariga* (series)
10. *Terra Nova* (series)
11. *Verão M* (series)
12. *Voo Directo* (series)

RTP2 – 6

13. *A Criação* (series)
14. *Aqui Tão Longe* (series)
15. *Lusitana Paixão* (telenovela)
16. *Os Nossos Dias* (soap opera)
17. *Sara* (series)
18. *Sinais de Vida* (series)

SIC – 21

19. *Amor à Vida* (telenovela-Brasil)
20. *Viver a Vida* (telenovela-Brasil)
21. *ONICE* (YA series)
22. *A hora da Liberdade* (tv film)
23. *Alta Fidelidade* (tv film)
24. *Amo-te Teresa* (tv film)
25. *Aniversário* (tv film)
26. *Anjo Caído* (tv film)

27. *Até Amanhã Camaradas* (tv film)
28. *Capitão Roby* (series)
29. *Camilo, o Presidente* (sitcom)
30. *Facas e Anjos* (tv film)
31. *Golpe de Sorte - um Conto de Natal* (tv film)
32. *Jogo da Glória* (tv film)
33. *Monsanto* (tv film)
34. *O Crime do Padre Amaro* (mini-series)
35. *O Espírito da Lei* (series)
36. *O Segredo* (series)
37. *Rainha das Flores* (telenovela)
38. *Um Passeio no Parque* (series)
39. *Uma Aventura* (YA series)

TVI – 24

40. *Maria Madalena* (series-Mexico)
41. *A Casa é Minha* (sitcom)
42. *A Outra* (telenovela)
43. *Belmonte* (telenovela)
44. *Campeões e Detetives*
45. *Casos da Vida* (one-shot)
46. *Destinos Cruzados* (telenovela)
47. *Detective Maravilhas* (YA series)
48. *Doce Tentação* (telenovela)
49. *Espírito Indomável - a série* (series)
50. *Filmes TVI* (tv film)
51. *Inspector Max* (series)
52. *Louco Amor* (telenovela)
53. *Mar de Paixão* (telenovela)
54. *Morangos com Açúcar VII: vive o teu Verão* (YA series)
55. *Morangos com Açúcar VIII: vive o teu Verão* (YA series)
56. *Mundo ao Contrário* (telenovela)
57. *O Amor É um Sonho* (Telenovela)
58. *O Bando dos 4* (YA series)
59. *Onde está Elisa?* (series)
60. *Ministério do Tempo* (series)
61. *Prisioneira II* (telenovela)
62. *Saber Amar* (telenovela)
63. *Santa Bárbara - a série* (series)

TOTAL PREMIERE NATIONAL TITLES: 19

TOTAL RERUN TITLES: 63

TOTAL AIRED TITLES: 81

In 2020 Portugal’s offer of original titles reverted to the same numbers as those in 2018 (19). Private channels offered the same number of titles as in 2019 while RTP1 broke the trend and presented three fewer titles than in 2019. The second public media service channel RTP2, which had not premièred any titles in 2019, is now present in the chart with two series. On the other hand, the subscription-based channel CMTV, which made an attempt by airing a national telenovela in 2019, discontinued this strategy due to a lack of ratings. If the number of rerunning titles had already increased from 2018 to 2019, this trend continued through 2020, mostly due to the need to reduce programming costs. Out of the four channels in the analysis, SIC was the one which presented the largest increase, with 61% more titles in rerun than in 2019. Even though it had the same number of premières (7), only two were telenovelas coming from 2019. This led to the need to fill the slots.

Regarding products imported from the Iberian-American space, there was an increase (from three to four titles) of telenovelas which were aired by SIC during primetime/late night.

Table 2. Fiction premiere in 2020: Countries of Origin

Country	Titles	%	Chapters/ Episodes	%	Horas	%
NATIONAL (total)	19	82.6	1242	76.6	794:19:21	75.8
OBITEL COUNTRIES total)	4	17.4	380	23.4	252:59:13	24.2
Argentina	0	0.0	0	0.0	0:00:00	0.0
Brasil	4	17.4	380	23.4	252:59:13	24.2
Chile	0	0.0	0	0.0	0:00:00	0.0
Colombia	0	0.0	0	0.0	0:00:00	0.0
Equador	0	0.0	0	0.0	0:00:00	0.0
Espanha	0	0.0	0	0.0	0:00:00	0.0
EUA (produção hispânica)	0	0.0	0	0.0	0:00:00	0.0
México	0	0.0	0	0.0	0:00:00	0.0
Peru	0	0.0	0	0.0	0:00:00	0.0
Portugal	19	82.6	1246	76.8	794:56:33	75.9
Uruguay	0	0.0	0	0.0	0:00:00	0.0
Venezuela	0	0.0	0	0.0	0:00:00	0.0
COPRODUÇÕES (total)	0	0.0	0	0.0	0:00:00	0.0
Coproduções brasileiras	0	0.0	0	0.0	0:00:00	0.0
Coproduções entre países	0	0.0	0	0.0	0:00:00	0.0
Obitel	0	0.0	0	0.0	0:00:00	0.0
GRAN TOTAL	23	100.0	1622	100.0	1047:18:34	100.0

The drop in opening national titles had an impact in the number of chapter/episodes (-42%) and in the volume of aired hours (-22.5%). However, the imported titles, all coming from Brazil, managed to surpass the additions from 2019 (+18%) and, consequently, the total number of hours (+21%).

Table 3. National and Ibero-American fiction formats

Format	National						Ibero-American					
	Titles	%	C/E	%	H	%	Titles	%	C/E	%	H	%
Telenovela	6	31.6	1074	86.5	709:10:56	89.3	4	100.0	380	100.0	252:59:13	1.0
Série	6	31.6	145	11.7	68:39:10	8.6	0	0.0	0	0.0	0:00:00	0.0
Minissérie	3	15.8	12	1.0	8:23:39	1.1	0	0.0	0	0.0	0:00:00	0.0
Telefilme	1	5.3	1	0.1	1:37:39	0.2	0	0.0	0	0.0	0:00:00	0.0
Unitário	1	5.3	1	0.1	0:57:24	0.1	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
Sitcom	2	10.5	9	0.7	5:30:33	0.7	0	0.0	0	0.0	0:00:00	0.0
Total	19	100.0	1242	100.0	794:19:21	100.0	4	100.0	380	100.0	252:59:13	1.0

Source: Obitel Portugal / Marktest MediaMonitor

In 2020 there was a greater variety of formats than in 2019, with a reduction in the number of telenovelas (from 10 to 6) as well as series (from 8 to 7) and tv films (from 2 to 1), but an increase of mini-series (from 1 to 3). Regarding series, it is important to point out the integration of two structural trends - on the one hand the series with seasons and, on the other, the limited series, conceived with a single and closed narrative arc (*Crónicas dos Bons Malandros*, RTP). Considering the pandemic context, it is equally interesting to see that there were two series on this very subject aired by the public network: *O Mundo não Acaba Assim* - multiple concurrent stories told through webcams and produced in the actors' own homes and *Quarenteen*, a piece of content geared towards the YA audience.

There were also notable examples in the sitcom and one-shot format. The latter, not having too much of a tradition in Portugal, was used by SIC to première *Esperança*, one of their “star” titles

available on their new streaming platform - OPTO. Audiences had then the chance to watch the pilot in open signal which would spark their interest in subscribing. At the same time, the private channel followed up on the strategy of building parallel stories to successful titles under new formats, thus contributing to a renewed offering while taking advantage of production structures that were already in place and adapted to the pandemic constraints (the TV film *Golpe de Sorte: a história da Maria do Céu* and the mini-series *Nazaré: especial Natal*). Equally noteworthy was the return of the sitcom, which, despite its long-standing history in Portugal, has had a diminished expression in recent years. *Patrões Fora* (SIC) plays out on the set of the daytime talk show *Casa Feliz* in a sort of plot/genre crossover (fiction and entertainment), thus attempting to engage a broader audience. *Ai a Minha Vida* (TVI) is a carbon copy of the famous Brazilian sitcom *Sai de Baixo*, but, due to the Covid-19 pandemic, had to forego the live airing and studio audience.

Table 4. The ten most watched titles on broadcast television

	Titles	Channel	Production company	Format/ Genre	Nº of ch./ep. (2020)	Time Slot	Rating	Share
1	<i>Nazaré</i>	SIC	SP Televisão	Telenovela/ Drameia	250	Primetime	14.6	27.1
2	<i>Terra Brava</i>	SIC	SP Televisão	Telenovela /Melodrama	266	Primetime	12.7	27.6
3	<i>Patrões Fora</i>	SIC	Coral Europa	Sitcom/ Comedy	3	Primetime	12.2	22.5
4	<i>Quer o Destino</i>	TVI	Plural Entertainment	Telenovela /Melodrama	229	Primetime	11.5	21.9
5	<i>Bem Me Quer</i>	TVI	Plural Entertainment	Telenovela /Melodrama	58	Primetime	11.1	21.3
6	<i>Amar Demais</i>	TVI	Plural Entertainment	Telenovela /Melodrama	89	Primetime	9.2	20.9

Titles		Channel	Production company	Format/Genre	N° of ch./ep. (2020)	Time Slot	Rating	Share
6	<i>Amar Demais</i>	TVI	Plural Entertainment	Telenovela /Melodrama	89	Primetime	9.2	20.9
7	<i>Eta Mundo Bom</i>	SIC	TV Globo	Telenovela /Melodrama	106	Access	8.6	20.4
8	<i>Golpe de Sorte IV</i>	SIC	Coral Europa	Series/ Dramey	81	Primetime	7.6	21.3
9	<i>Na Corda Bamba</i>	TVI	Plural Entertainment	Telenovela /Melodrama	148	Primetime	7.5	16.2
10	<i>Crónica dos Bons Malandros</i>	RTP	Ukbar Filmes and Moonshot Pictures	Mini-series/ Comedy	4	Primetime	6.0	10.9

Source: *Obitel Portugal / Marktest MediaMonitor*

In 2020 SIC kept its lead in audience fiction preference and reached not only the top three spots, but a total of five products among the most viewed shows by Portuguese audiences, with the telenovela *Nazaré* being the most watched in Portugal in 2020. TVI closely follows with four titles, the same number as in 2019.

Inversely to what happened in the previous year, in 2020 the Brazilian telenovela *Eta Mundo Bom* managed to reach the top ten titles, showing that Portuguese audiences still watch non-national fiction content and, in this case, on time slots other than primetime, which is when most of this format is aired. The public network hadn't managed to offer a title in the top ten in 2019, but last year, the mini-series *Crónica dos Bons Malandros*, an adaptation of a literary work from the 1980s about the adventures of a legendary crew of robbers who pulled

a famous heist in the post-revolution period in Portugal, managed to reach the last place in the chart.

As far as formats, even though the telenovela remains as the preferred one (with 7 titles), there is a larger variety with the offering of a mini-series and a sitcom. Regarding genres, emphasis should be given to dramedy, a term often used by the industry to define a hybrid genre that combines drama and comedy without trying to repeat the usual genres present in the traditional vaudeville format, as present in the comic relief characters within the melodrama, attempting instead to merge the two. Dramedy has created its own identity as a genre by blending dissonant elements and by being able to create a new order of meaning, thus earning itself a new labelling concept.

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

Titles		Channel	Genre %		Socioeconomic status %				
			Women	Men	A	B	C	D	E
1	<i>Nazaré</i>	SIC	61.4	38.6	1.8	9.8	15.6	42.8	29.9
2	<i>Terra Brava</i>	SIC	62.2	37.8	1.5	9.5	16.0	42.7	30.3
3	<i>Patrões Fora</i>	SIC	59.7	40.3	2.5	14.2	16.1	40.2	26.9
4	<i>Quer o Destino</i>	TVI	61.6	38.4	3.7	5.4	13.8	44.5	32.7
5	<i>Bem Me Quer</i>	TVI	61.5	38.5	2.0	6.6	13.2	42.8	35.5
6	<i>Amar Demais</i>	TVI	61.2	38.8	2.1	5.7	13.5	41.7	36.9
7	<i>Eta Mundo Bom</i>	SIC	64.9	35.1	2.4	9.5	13.1	43.5	31.5
8	<i>Golpe de Sorte IV</i>	SIC	63.2	36.8	1.3	9.7	17.6	44.3	27.1
9	<i>Na Corda Bamba</i>	TVI	62.1	37.9	1.8	4.3	14.6	45.4	33.9
10	<i>Crónica dos Bons Malandros</i>	RTP	54.3	45.7	2.4	14.7	17.5	41.5	23.8

Source: Obitel Portugal / Marktest MediaMonitor

Titles		Channel	Age groups %							
			4 to 14	15 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65 to 74	75+
1	<i>Nazaré</i>	SIC	6.1	7.9	7.8	10.9	15.9	20.3	17.4	13.7
2	<i>Terra Brava</i>	SIC	5.1	6.9	6.8	10.5	15.7	21.8	17.8	15.5
3	<i>Patrões Fora</i>	SIC	6.2	7.3	6.3	12.7	15.0	21.0	17.7	13.7
4	<i>Quer o Destino</i>	TVI	5.0	6.5	10.5	10.1	11.9	19.6	17.6	18.8
5	<i>Bem Me Quer</i>	TVI	5.2	7.9	9.5	8.8	12.1	19.8	19.8	16.9
6	<i>Amar Demais</i>	TVI	4.1	6.4	9.5	8.8	11.7	22.8	19.4	17.4
7	<i>Eta Mundo Bom</i>	SIC	4.6	7.6	5.8	9.7	17.0	24.0	16.1	15.2
8	<i>Golpe de Sorte IV</i>	SIC	4.8	6.7	7.7	13.8	15.1	22.1	15.6	14.3
9	<i>Na Corda Bamba</i>	TVI	5.0	6.1	8.9	10.9	12.0	20.0	19.5	17.5
10	<i>Crónica dos Bons Malandros</i>	RTP	1.9	3.6	4.8	6.7	9.9	18.2	22.6	32.3

Source: *Obitel Portugal / Marktest MediaMonitor*

Telenovela remains as the preferred format for women, as evidenced by the data on every title, while men maintain a relatively stable preference across the content present in the top ten (38%). It is worth noting that the only major difference can be seen in the percentage of men who watched the mini-series *Crónica dos Bons Malandros* on RTP, which was the title where male audiences came the closest their female counterparts (less 8,6% than women's 54,3% lead).

Regarding socio-economic brackets, groups D and E still prefer the *telenovela* as their primetime program of choice. Following the trend of the previous year, the differences between socio-economic brackets preferring SIC and TVI disappeared altogether, as the telenovela which managed to capture a larger section of viewers in the A bracket was TVI's *Quer o Destino*.

By looking at the results pertaining to age groups, the telenovela format remains as the preferred across the board or, in other words, families. The best results are still those from the 55+ age group. *Patrões Fora* (SIC) was the only title that won more audience among a younger age group and *Crónica dos Bons Malandros* (RTP) was the production that most attracted older audiences.

3. VoD Monitoring in 2020

In a year marked by the Covid-19 pandemic, the new consumption profiles for fiction still hold as a growing trend and the streaming offer is ever more extensive. This trend can be seen on a global scale, according to the data collected by Marktest’s Barómetro de Telecomunicações¹⁰, with Netflix registering over 15 million new subscribers between February and April. In Portugal, this service had over 800 thousand new subscribers during the same period.

In Portugal, 2020 was also a landmark year for the launch of two streaming platforms: Disney+ and OPTO (SIC’s streaming platform), both included in Table 3. Along with OPTO, RTP Play is also worth mentioning as these two platforms were the only ones with premiering national titles in 2020.

3.1. VoD Market Platforms

According to the European Audiovisual Observatory (EAO) mentioned in 1.2, by 2020 Portugal had 14 SVoD services, with around 1.6 million subscribers (roughly 10% of the Portuguese population). At its lead, Netflix remains as the most relevant platform with 47% of all subscribers, followed by Apple TV+ (21%) and Prime Video (13%). The growing number of Apple TV+ subscribers against the previous year is partly due to the fact that this service was on offer with the purchase of an Apple device.

The aforementioned impact also translated into a larger number of revenue in the provider market, as mentioned by Obercom’s report “Impacto do Coronavirus e da crise pandémica no Sistema

¹⁰ Marktest Portugal. Retrieved on April 10, 2021 <https://www.marktest.com/wap/a/n/id~262d.aspx>

mediático português e global”¹¹. According to the report, Vodafone had an 8% increase in revenue from previous years.

Data published by the platform Statista¹², indicate that VoD service revenue reached 52,6 million Euro in 2020, and it is estimated that in 2021 it will reach 62 million Euro, which represents a 15,1% from the previous year. According to this data, a gradual increase of revenue (5.8%) is to be expected, with a projected 78 million Euro in 2025.

3.2. Analysis of VoD in 2020: national and Ibero-American premiere fiction

In 2020 there was a reduction in the number of Iberian-American titles on offer due to the global Covid-19 pandemic, which had an impact on numerous audiovisual productions across the world. In Portugal, the VoD platforms presented a total of 36 premiering productions, four of which were co-productions. These numbers, as shown on Chart 6, strengthen Netflix’s dominance as the OTT with the largest offering, with 18 premiering titles, followed by HBO Portugal (9), Prime Video (4), OPTO (3) and RTP Play /2). Regarding Portuguese titles, there was an offering of five national productions and one co-production with Spain (the series *Auga Seca*), with particular emphasis given to OPTO, which presented itself as a new VoD player, as discussed in 6.

11 Obercom. Retrieved on April 10, 2021 https://obercom.pt/wp-content/uploads/2021/02/Covid_III_FINAL.pdf

12 Statista. Retrieved on April 10, 2021 <https://www.statista.com/outlook/dmo/digital-media/video-on-demand/video-streaming-svod/portugal>

Table 6. National and Ibero-American fictions in 2020 on VoD systems

NATIONAL PREMIERE TITLES	IBERO-AMERICAN PREMIERE TITLES	CO-PRODUCTIONS
<p>RTP Play – 2</p> <ol style="list-style-type: none"> 1. <i>Dolores (series)</i> 2. <i>Instaverso (series)</i> <p>OPTO – 3</p> <ol style="list-style-type: none"> 1. <i>A Generala (series)</i> 2. <i>Esperança (series)</i> 3. <i>O Clube (series)</i> 	<p>Prime Vídeo – 3</p> <ol style="list-style-type: none"> 1. <i>Caronte (series - Spain)</i> 2. <i>El Cid (mini-series - Spain)</i> 3. <i>Como Sobrevivir Soltero (series - Mexico)</i> <p>HBO Portugal – 8</p> <ol style="list-style-type: none"> 1. <i>El Embarcadero (series - Spain)</i> 2. <i>El Ministerio del Tiempo (series - Spain)</i> 3. <i>En Casa (anthology - Spain)</i> 4. <i>Escenario 0 (series - Spain)</i> 5. <i>Patria (series - Spain)</i> 6. <i>Por H o por B (series - Spain)</i> 7. <i>Veneno (mini-series - Spain)</i> 8. <i>30 Monedas (series - Spain)</i> <p>Netflix – 16</p> <ol style="list-style-type: none"> 1. <i>3% (series- Brazil)</i> 2. <i>A Coisa Mais Linda (series - Brazil)</i> 3. <i>Alta Mar (series - Spain)</i> 4. <i>Boca a Boca (series – Brazil)</i> 5. <i>Casi Feliz (series – Argentina)</i> 6. <i>El Desorden que Dejas (series – Spain)</i> 7. <i>El Robo del Siglo (series – Colombia)</i> 8. <i>Elite (series– Spain)</i> 9. <i>La Casa de las Flores (series – Mexico)</i> 10. <i>La Casa de Papel (series – Spain)</i> 11. <i>Las Chicas del Cable (series – Spain)</i> 12. <i>Los Favoritos de Midas (mini-series – Spain)</i> 13. <i>O Sabor das Margaridas (mini-series – Spain)</i> 14. <i>Puerta 7 (series – Argentina)</i> 15. <i>Valeria (series – Spain)</i> 16. <i>Vivir Sin Permiso (series – Spain)</i> 	<p>Prime Vídeo – 1</p> <ol style="list-style-type: none"> 1. <i>El Presidente (series – Argentina, Chile, EUA)</i> <p>HBO Portugal – 1</p> <ol style="list-style-type: none"> 1. <i>Auga Seca (series – Spain, Portugal)</i> <p>Netflix – 2</p> <ol style="list-style-type: none"> 1. <i>Alguien Tiene que Morir (mini-series – Spain, Mexico)</i> 2. <i>Selena: la serie (series – Mexico, EUA)</i>
Total: 5	Total: 27	Total: 4
GRAND TOTAL: 36		

Table 7. Fiction premiere in 2020 on VoD: countries of origin

Country	Titles	%
NATIONAL (total)	5	13.8
OBITEL COUNTRIES (total)	27	75.1
Argentina	2	5.6
Brazil	3	8.4
Chile	0	0.0
Colombia	1	2.7
Ecuador	0	0.0
Spain	19	52.8
USA (Latin production)	0	0.0
Mexico	2	5.6
Peru	0	0.0
Portugal	5	13.8
Uruguay	0	0.0
Venezuela	0	0.0
CO-PRODUCTIONS (total)	4	11.1
Portuguese co-productions	1	2.7
Co- productions among Obitel countries	3	8.3
GRAND TOTAL	36	100%

Source: Obitel Portugal

As can be seen on Chart 7, five of the twelve Obitel countries had premiering productions on the Portuguese catalogues (41,7%) with Spain having the largest offering (19), followed by Brazil (3), Argentina and Mexico (2) and Colombia (1). The remaining countries - Chile, Ecuador, USA, Peru, Uruguay and Venezuela - had no premiering productions in Portugal, but Chile and the USA participated

in co-productions with the series *El Presidente* (a co-production with Argentina, Chile and the USA) and *Selena: la serie* (a co-production with Mexico and the USA).

4. Fiction and audience engagement in digital environments

Following the trend of previous years, audience engagement in digital environments could predominantly be seen on social media in the managed digital accounts for the main titles on air. Therefore, similarly to 2019, all the telenovelas and series for the different networks have either a Facebook or Instagram account where the production shares plot developments, backstage images and videos as well as open-ended questions attempting to engage audience interaction. Even though these accounts are admittedly “official” in nature, there are notable examples, continuing from last year, such as the case of SIC’s telenovela *Terra Brava*, in which the actress Sara Matos kept on producing content for Instagram as “Elsa Santino”, her character on the telenovela. Apart from the usual promotion of plot developments and audience interaction, the actress also presented clips from alternate points of view to shots that were aired on regular broadcast as well as her own personal reaction as Elsa Santino to certain dramatic developments. It was also under this guise that the character launched her official music clip on Youtube, as was portrayed in the plot.

Still, with the emergence of the pandemic in 2020 and the drastic social and cultural paradigm shift worldwide, the main audiovisual content providers in Portugal were forced to reconsider their ongoing and future offering in face of the challenges that this new reality posed. Therefore, considering the natural constraints to social distancing, the interdiction to cross over districts and the general lockdown orders, digital media immediately assumed a crucial role not only in providing on-demand content, but also as a way to present new types

of offering that are exclusively digital. The channel RTP Memória, previously geared towards airing classics and archive footage, was entirely restructured to run distance school classes complemented by a strong online component. Similarly, the Arts quickly embraced the digital landscape as an alternative to the closing of live performances. Therefore, apart from the creation of online theatres, as was the case of the National Theatre D. Maria II, RTP itself fast-tracked a project still in development - RTP Palco - in order to launch it as a response to the constraints caused by the pandemic. RTP Palco is an on-demand digital content offering geared towards culture and performative arts, such as tapings of dance shows, music events and theatre, among others. Even though this type of content is not of a strictly televised nature, it is worth noting that the platform itself is strikingly similar to any other VoD offering such as RTP Play or Netflix, and even goes as far as presenting original productions. Indeed, 2020 was marked precisely by the significant increase in offering of digital and on-demand content as a viable alternative in face of a lockdown context.

In face of this trend, and also due to the production constraints that led to actors, authors and production crew to be in quarantine, there was an added interest in digital fiction, as was the case of projects such as “Hashtag Quarentena” (@hashtagquarentena) e “Chamadas Para a Quarentena” (@chamadasparaaquarentena). Both of these relied on a series format that openly assumed the lockdown as a reality and actors - often playing themselves - would interact with each other on video conference. These episodes were made available on social media such as Facebook and Instagram and created their own audience organically through virality. In the case of “Chamadas Para a Quarentena”, the series concept was acquired by RTP and adapted for broadcast under the title *O Mundo Não Acaba Assim*. This is a rare case of transmediality from digital to FTA which demonstrates the power that this medium has obtained in response to the pandemic.

5. Highlights of the Year

During a year so deeply impacted by the consequences (in production and in consumption) of a worldwide pandemic, the FTA networks were compelled to update their strategy and open themselves to reflect and act on what was already in the foreseeable future: the inevitable paradigm shift regarding television consumption in face of a greater acceptance of new formats and content platforms. This was evidenced by the investment in a non-linear and decentralized offering. As Amanda Lotz (2018) had already stated:

“Rather than killing television, internet distribution markedly improved how we watch. Crucially, internet distribution has capabilities that broadcasting, cable, and satellite lack. Internet-distributed television allows audiences on-demand access. This capability is forcing a reinvention of television businesses that were built on scheduling programs. Changes in the business of television change what shows are made and what audiences can watch.”¹³ (p.5)

Therefore, the chosen highlight of the year were the local production strategies by streaming services and FTA stations that operate in national territory.

OPTO, the platform launched by SIC in late November, 2020, had the draw of offering exclusive titles to mark this new distribution strategy, as well as a comprehensive catalogue of thirty years of programming that is now available to watch. Among the new content, there is the series *A Generala*, which had received support from the Instituto do Cinema e do Audiovisual (ICA), something which hadn't occurred

13 Obercom. Retrieved on April 17, 2021 https://obercom.pt/wp-content/uploads/2021/02/Covid_III_FINAL.pdf

in many years for a private network; a documentary by the comedian Bruno Nogueira, *Como é que o Bicho Mexe - O Natal de Maio*, comedy sketches by Ricardo Araújo Pereira, an autobiographical documentary by chef Ljubomir Stanisic; a drama series about night-life in Lisbon titled *O Clube* and *Esperança*, a series by the comedian César Mourão, who transitioned from the generalist channel to the streaming platform to try and blend drama and comedy under the same narrative.

SIC's streaming service has a premium plan with a price point of 9,99€ for international clients and 3,99€ for national clients, as well as a free version where, for the first time in Portugal, exclusively digital content is distributed. In the premium service, users have access to exclusive programmes and series, previews of telenovela episodes aired on SIC and "tailored" information with daily news of 10, 15 or 20 minutes.

As for the "paid" vs "free" subscriptions offered by national networks, there are three very distinct strategies in place: RTP Play operates according to a free model, partly due to being offered by a public service network and not being under the same commercial pressure than that of private networks, as a significant part of its budget comes from the so-called television tax (amount paid by taxpayers within the electric bill). Another reason for this model is the fact that it was born out of a repository/archive concept that naturally falls under the responsibility of a public service. TVI Player, on the other hand, operates under a mixed strategy by being free for national audiences and paid for international counterparts at 3,99€/month. OPTO follows a purely SVoD model in a clear emulation of Netflix's production strategy by requiring a fixed monthly subscription, but also an investment in exclusive productions for the platform.

Along with the enactment of the European Directive into national law, the launch of this platform was an important step in the Portuguese audiovisual strategy overall, as it contributed to create market

growth opportunities and livened the independent production sector by offering competitive Portuguese-speaking titles.

6. Theme of the year: Fiction in times of pandemic

In March, 2020, the Portuguese government declared a state of emergency, which caused a significant change in communication practices and the media consumption of the Portuguese people. According to a study by Obercom (July, 2020) titled “Pandemia e consumos mediáticos”¹⁴, there was an increased use of paid streaming platforms with 20,3% of interviewees stating to have subscribed a new information or entertainment service that they didn’t have before. This shows an acceleration of the ongoing process, one that is related with the change in consumption habits of the Portuguese viewers and follows a similar trend across the world.

The arrival of streaming platforms changed social practices, fragmented viewing, increased production costs and reformulated distribution circles. Platforms reinvented the way audiences watch television and generated a new concept - *binge watching* - consisting of consuming the content on offer from end to end in a compulsive fashion. This may have been heightened in the context of the pandemic, when the cultural and recreational offering was severely restricted. All of these changes happened in little over a decade, with a rapid acceleration during the last five years. There was a significant increase in the production of content from various geographies and, as new markets were conquered and the average viewing time increased, so did our ease of access through assorted screens.

In 2007, Netflix broke new ground in the media landscape by offering a paid streaming service and redefined its algorithm in order to show current trends and suggested content to its users. In 2011, this

14 Obercom. Retrieved on April 17, 2021 https://obercom.pt/wp-content/uploads/2021/02/Covid_III_FINAL.pdf

platform announced the start of original productions, something that would change the market and the way content is distributed. Currently, we are witnessing the gradual growth of assorted streaming platforms, including those with original productions as a way to set themselves apart from others and compete with Netflix itself. HBO, Amazon Prime Video and Disney+, the most relevant providers in the national market, have become strong contenders in an increasingly global landscape, with content largely produced in the United States, but with an increased importance of peripheral markets and an emphasis on series and films in Spanish. The entertainment industry increased to such a size that it has become very relevant for national economies. According to *The Economist*, \$650 billion were spent in programmes and acquisitions in the last five years, \$100 million of those just in the last year, a number which is only comparable to that of the oil industry.

Even though the pandemic has influenced the rise of streaming services subscriptions, there is a clear retention power in digital content, as 84,4% of interviewees stated that they will not suspend their subscriptions made during lockdown.

The national highlight on international platforms goes to the series *Glória*, which is the first Portuguese original project on Netflix. Directed by Tiago Guedes and original screenplay by Pedro Lopes, the Cold War thriller was produced by SPi, from the SP Televisão Group, and co-produced by RTP. This series takes place in the Portuguese village Glória do Ribatejo, where the American Communications Centre RARET broadcast Western propaganda to the Eastern Bloc during the Cold War. This is the perfect setting for a story of high-stakes espionage that can change the course of Portuguese and world history. Therefore, *Glória* is a project that aims to strengthen the strategic vision that several Portuguese production companies have of expanding across borders at a point in time that is equally important for the Portuguese audiovisual market, as the series sets the landmark for a new

cycle as it puts Portugal on the map of large international productions that Netflix is known to have.

Also for the first time, in 2020 Netflix and Instituto do Cinema e do Audiovisual (ICA) issued a call named “Escrita e Desenvolvimento de Argumento” for Portuguese authors and screenwriters. ICA stated that this partnership served as a way to drive Portuguese audiovisual production forward at a point in time where the sector was suffering heavily from the Covid-19 pandemic and the European Directive “Serviços de Comunicação Audiovisual a pedido”, which was passed by the end of 2018, had just been enacted into law. As stated above, according to this new law, streaming services such as Netflix are required to have at least 30% of European titles on their series and documentary roster.

Another important landmark this past year was the deal for a second season of the Iberian series *Auga Seca*, a co-production between Portocabo and SPi which will be available on HBO Portugal and Espanha Original. This police procedural was originally aired by RTP and TV Galicia and a second run in 2020 on HBO, thus integrating the first season on their content portfolio on both markets. The results were very positive among subscribers, which led to the direct investment in the series for a second season, this time with HBO having the first run.

Also in 2020, the video-on-demand platform Filmin, known for its vast catalogue of independent films incorporated 118 Portuguese titles. Filmin is originally a Spanish platform present in Portugal since 2016 and it has in its catalogue 125 short and feature films, both fiction and non-fiction. This is more than enough proof of the vitality and growth of the Portuguese audiovisual sector and its growing ability to find new distribution paths which - as we know from this year of pandemic - are as necessary as inevitable.

As counterpoint to this accelerated demand and offering of streaming content, the new challenges posed by the effects of the pandemic can be identified. Even though they are being overcome by the

audiovisual industry, they were particularly serious for production companies devoted to fiction. On March 2, 2020, the first case of Covid-19 was identified in Portugal and in less than two weeks later the production of series and telenovelas stopped, not because of a government mandate, as with other economic sectors, but because information on the means of transmission was still scarce, as were the prevention methods. Therefore, production companies themselves adopted preventive measurements in order to protect their own professionals. Between March and April, many companies turned to lay-offs and, in the following months, attempted to resume activity, especially projects that were abruptly interrupted and postponing the remaining projects that were in pre-production. Before the pandemic, the cultural and creative industries had had a constant growth since 2013, with the audiovisual sector growing between 0,3% and 3% annually and a turnover in 2019 of 119.000 billion Euro out of 643.000 billion Euro overall, due not only to the cinema production but mostly to the development of streaming platforms¹⁵. In the case of Portugal, the market was stable with a constant investment by FTA networks and streaming platforms making their first stakes in Originals. The pandemic increased costs in about 20% according preliminary data yet unpublished by APIT (Associação de Produtoras Independentes de Televisão), which falls in line with other European countries.

Despite this scenario, which gave momentum to the demand/offer of streaming platforms, television business has changed but not weakened (Lotz, 2018). In fact, according to researchers Joke Hermes and Annette Hill (2020):

15 Rebuilding Europe: the cultural and the creative economy before and after the Covid-19 Crisis. Retrieved on May 4, 2021 <https://www.rebuilding-europe.eu/>

Corona has re-consolidated television as master storyteller and as platform for cultural citizenship. Television could not have done this if the medium had not been domesticated as ‘family’ maker and teller of never-ending stories that offer ontological security and allow us to cope. In lockdown, even more than ordinarily, this provides the necessary link from the intimate to the public; transforming the domestic into a space for endless meetings, viewpoints, considerations as well as allegiances. Television undoes social distance. (p. 659).

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10

URUGUAY

FICTION ON THE RUN AND INDUSTRY ON THE RISE.

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Introduction

The year 2020 began with a new government in Uruguay, as the result of the 2019 presidential elections. After 15 years of government of the Frente Amplio, there was an alternation of parties. This implied changes in the conduction of cultural policies and state agencies specifically linked to audiovisual development, such as the Institute of Cinema and Audiovisual of Uruguay (ICAU) board and the public channel, TNU, board. A few days after the new government took office, it was declared a public health emergency. These two events shaped a unique

context, with moments of bewilderment and paralysis, but also of dynamism in the field of the national audiovisual industry.

In recent years -mainly in 2020-, broadcast television has experienced a retreat to the traditional formats of contest and live programs based on conversation -*talk shows* in the broadest sense-, classics of the television since its origins. Programming strategies aim to capture a family audience, with proven recipes and risk reduction. In that design the novelty seems to have little place and serial fiction has seen its space greatly reduced: the volume of hours of Ibero-American fiction premiere barely reaches 3% of the total hours broadcast. Fiction is on the run to other screens and it is found in other settings.

In contrast to what happens on broadcast television, the Uruguayan audiovisual industry is experiencing a moment of great impulse and expansion. The carrying out in Uruguay of international projects of fiction series for large platforms, which had already been in progress, was strengthened in the pandemic context and seems to be projected into the next few years. Anyway, Uruguay seems to be a country without scripts: there is still no perspective of the execution of a Uruguayan television fiction with local showrunners for any of these platforms.

1. The Audiovisual Context of Uruguay in 2020¹

1.1. Broadcast television in Uruguay:

Chart 1. TV Networks/ national broadcast television channels in Uruguay

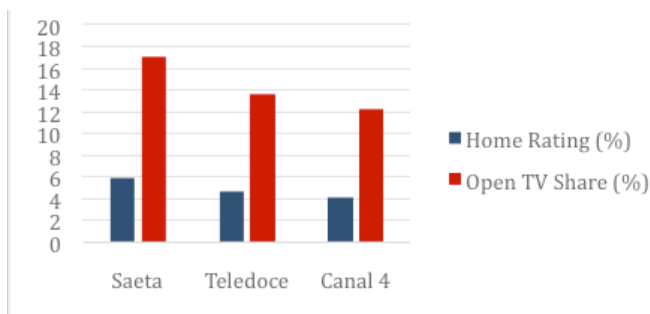
Private broadcast / channel (3)	Public broadcast / channel (2)
Canal 4 (Channel 4)	Televisión Nacional del Uruguay TNU (Channel 5)
Saeta (Channel 10)	TV Ciudad
Teledoce (Channel 12)	
CHANNELS TOTAL = 5	

Source: Obitel Uruguay

Graph 1. Rating and share by TV channel:

Channel	Home Rating (%)	Total TV Share (%)	Open TV Share (%)
Saeta	5,88	39,8	17,14
Teledoce	4,7	31,8	13,69
Canal 4	4,2	28,4	12,23
TNU	s/d	s/d	s/d
TV Ciudad	s/d	s/d	s/d
TOTAL	14.78	100	43.06

1 The analysis of broadcast television was based on data provided by Kantar Ibope Uruguay. We are particularly grateful for this contribution and in particular for the collaboration of Carolina Arigón and Valentina Cal.



Source: Kantar Ibope-Obitel Uruguay

The total annual audience of private broadcast television channels reached a *rating* of 14.78% and a 43.06% *share*. Although the general perception in 2020 was that broadcast television had increased its audience *share* -as reported by some articles in the national press- the data shows a new drop in annual audience with respect to 2019: about two points less in *rating* and four points less of *share*. This confirms the downward trend since 2013, already pointed out in previous reports. (Sánchez Vilela, Gadea, 2020, p. 324)

The pandemic situation caused that at times the citizens were concerned about information, especially of the press conferences that were broadcast daily by the Presidency of the Republic. Thus, according to Kantar-Ibope, between March 2nd and 18th, the *rating* in homes grew by 28%². However, in the global result of the year, this growth in audience volume is diluted and does not cushion the decline that had already been taking place. In this context of meager audiences, Saeta is the TV station that concentrates almost 40% of the *rating* with an an-

2 On March 13th, the pandemic was decreed in Uruguay, but the information of the spread of the COVID-19 around the world began to cause alarm before.

nual average of 5.88 points, followed by Teledoce and Canal 4. There are no audience measurements for public television stations.

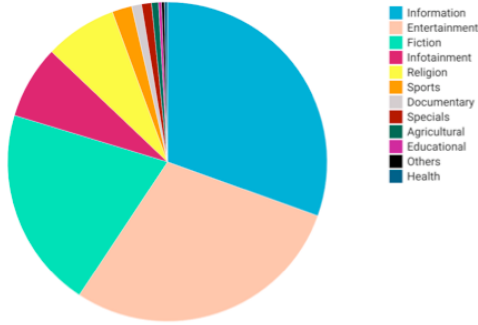
The study of the programming (Graph 2) reveals how the broadcast time was distributed by genre: the first two places corresponded to Information (30.47) and Entertainment (28.82). Fiction ranks third with 20%, 3,603 hours, including cinema³.

In 2020, 75% of the total broadcast hours corresponded to nationally produced programs. The historical trend had been around 60% and in 2019 reached 68%. This growth, which could be encouraging, was not really so for fiction: information, entertainment and infotainment occupied 84% of the broadcast hours, while fiction did not reach a percentage point.

Graph 2. TV genres and broadcast programming hours.

Genre	Hours	%
Information	5387:04:30	30.5
Entertainment	5094:19:30	28.8
Fiction	3603:05:15	20.4
Infotainment	1310:37:30	7.4
Religion	1297:05:15	7.3
Sports	347:23:15	2.0
Documentary	182:15:45	1.0
Specials	178:56:15	1.0
Agricultural	130:19:30	0.7
Educational	51:45:45	0.3
Others	48:57:00	0.3
Health	46:35:15	0.3
Total	17678:24:45	100

³ The study of programming by gender only took into account private channels because we do not have uniform information to incorporate into TNU. Anyway, we did a study of their programming to identify Ibero-American titles. TV Ciudad was not included as it is a public channel with a metropolitan reach.

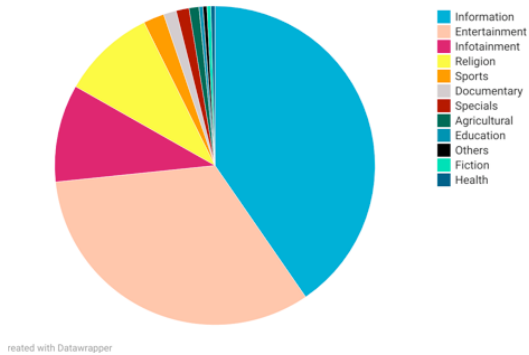


Source: Obitel Uruguay on data from Kantar Ibope

Graph 2.a TV genres and broadcast programming hours of national production:

Genre	Hours	%
Information	5387:04:30	40.5
Entertainment	4393:33:45	33.0
Infotainment	1310:37:30	9.9
Religion	1257:53:15	9.5
Sports	285:33:00	2.1
Documentary	169:18:45	1.3
Specials	169:18:45	1.3
Agricultural	130:19:30	1.0
Education	51:45:45	0.4
Others	48:57:00	0.4
Fiction	46:52:30	0.4
Health	46:35:15	0.4
Total	13297:49:30	100

Source: Obitel Uruguay on data from Kantar Ibope



The 2020 audience measurement marked some trends in relation to genres that need to be highlighted. *Reality shows* such as *Got Talent* -20.11 *rating* points and 33.57 *share* points- and *Master Chef Celebrity Uruguay* -15.27 *rating* points and 24.6 *share*- concentrated the largest audience. Other programs such as *Pasapalabra* came close with a *rating* of 14.54 points and *Polémica en el Bar* reached 13.53. All these programs had *rating* and *share* values much higher than any premiere serial fiction title, not only Ibero-American, but of any origin.

With lower values in audience measurement it is placed the most watched newscast with a *rating* of 13.66 and a *share* of 23.24. These programs that occupy the first places are all national and broadcast by Saeta Canal 10.

1.2. Pay TV and VoD platforms in Uruguay

Chart 2. Pay TV networks in Uruguay

6 Pay TV Networks most viewed in 2020¹
1) DirecTV (foreign), 2) Cablevisión (foreign), 3) TCC (national), 4) Nuevo Siglo (national), 5) Montecable (national), 6) Multiseñal (national)

Source: Obitel Uruguay

Chart 3. VoD in Uruguay

Top Active VoD Platforms in 2020	Total
Netflix, HBO Go, Prime (Amazon), Flow (Cablevisión), NSNOW (Nuevo Siglo), TCC Vivo (TCC), MC GO (Montecable), DirecTV Go (DirecTV) Movistar+ (telecommunication company), Claro Video (telecommunication company), Vera+ (state telecommunication company)	
TOTAL	11

Source: Obitel Uruguay

4 These are the networks for which the largest number of users are registered (URSEC Report 2020). Audience measurements cannot be accessed.

1.3. Independent television fiction production companies

Some independent production companies are consistently committed to the production of content for broadcast television, but not fiction. In the year 2019 in the three private channels 4140:17:15 of the broadcast hours were produced by independent companies. For 2020, according to the title grid of each channel, the panorama should not be very different. Channels turn to independent production companies for entertainment or infotainment content: Kubrick Media for Teleocho and Zur for Saeta are examples of this.

On the other hand, production companies engaged in the production of fiction are dedicated to feature film projects and usually do not have links to television channels. Those that venture on serial content have carried out their projects with public funds. Some large production companies with a track record in advertising develop projects of fiction. Currently those in charge of serial fictions for platforms such as Amazon and HBO are Salado Films and Cimarrón.

1.4. Sources of funding for the audiovisual sector

Audiovisual production in Uruguay, documentary or fiction, has been supported by national public funds and co-production alliances with other countries. Since the return to democracy, several funds have been developed for different stages of implementation. In general, each audiovisual project tries to add several of these funds to be able to carry out the production. As a quick summary, the main funding sources available today, for film and television, will be described here.

ICAU, an institute under the sphere of the Ministry of Education and Culture (MEC), is the institution responsible for carrying out

public policies relating to the audiovisual sector. Manages the Film and Audiovisual Development Fund, established by the Film Law that allocates \$ 25,000,000 to support national productions and co-productions, as well as the dissemination of productions. The amount had been fixed in the 2008 law and, in response to complaints from the sector, annual indexation was introduced in 2018. Also the Audiovisual Fund of the Ministry of Industry, Energy and Mining (MIEM), of annual call, awards prizes to fiction or documentary series, as well as to short films. Well before that, in 1985, the Fund for the Promotion and National Audiovisual Development (FONA) was created, as the result of the joint activities of public and private institutions⁵.

Other funds come from the departmental government of Montevideo, for example: the Montevideo Socio Audiovisual Program, which allows pay back funds for the completion of film and television productions; Montevideo Filma that supports the production of fictions or documentaries with a duration longer than 45 minutes.

From 2019, first as a pilot scheme and since 2020 as a continuous policy, the Uruguay Audiovisual Program (PUA) was created, carried out by the National Development Agency (ANDE) with the participation of ICAU and MIEM. The programme consists of a cash rebate of a percentage of the expenditure made in the country, which varies according to the size of the production and with different maximum return ceilings. It has a credit line that serves national productions to be carried out in Uruguay, with two types of support: one for production and post-production (with the *cash rebate* mechanism) and another for development (non-refundable fund)⁶.

5 The Municipality of Montevideo, the broadcast and cable television channels, Asoprod in addition to the MEC. It awards prizes to feature films with Uruguayan director.

6 Up to 80% of the project is paid back. The projects that access the fund are of two types: projects with amounts between \$ 445,740 and \$ 891,480; projects greater than \$891,480. For each case ANDE sets maximum support amounts: \$445,740 in the first case and \$891,480 in the second.

A second line serves international productions that take place in Uruguay. It covers feature films, short films, documentaries, video clips, animations, series but also international advertising production services. In this line the reimbursements depend on the volume of investment of each project and with established ceilings. Thus, a project that has an expenditure of between US\$ 300,000 and US\$ 4 million will be refunded 25% with a ceiling of US\$ 700,000.

The SeriesUy⁷ fund, created in 2016, offers \$5,000,000 and it is intended for production projects of a fictional television series of eight episodes between 46 and 52 minutes each. The display screen is that of the public media (TNU and TV Ciudad). In its three calls, three projects were selected. Only one was aired, *Todos Detrás de Momo* (2017 call, premiered in 2018). *Metro de Montevideo* is in production (2019 call).

All these lines of financing aim to boost the audiovisual local industry; they go in parallel with those of the financing of broadcast television and hardly intersect. Traditional advertising is the main income of the channels, but in recent years the *product placement* has invaded the entertainment programs, to which the channels have bet.

According to data provided by Kantar Ibope, the advertising on broadcast television fiction was 1,467,228 seconds, lower than 2019 (1,932,705). The main advertisers of fiction continue to be Tele Shopping and Unilever. This year, Laboratorio Genoma occupied the third place, displacing El País to fourth place and finally SC Johnson.

7 It is made up of the ICAU, TNU, the MIEM, through the National Directorate of Telecommunications and Audiovisual Communication Services (DINATEL), the Montevidean Locations Office and TV Ciudad.

1.5. Communication policies

The new government brought the initiative to replace the Audiovisual Communication Services Law (LSCA) -that was conceived during the government of the Frente Amplio (FA)- with a new law. Let us recall briefly that the contents of the LSCA began to take shape in 2010, within the framework of a Technical Advisory Committee, convened by the Executive. The bill entered Parliament in 2013 and was passed in December 2014. However, the following year appeals of unconstitutionality were filed on some articles and their regulation was only approved by the Executive in June 2019⁸, so the application of the law was very partial. On the other hand, the institutionality created in the LSCA never worked totally. Thus, after the last period of government of the FA, the Audiovisual Communication Council had not been appointed⁹.

With the new government, the repeal of the eight articles that had been declared totally or partially unconstitutional was announced. In April 2020, a new bill to replace Law 19,307 entered Parliament. In the new draft, the questioned articles were eliminated and other provisions were maintained, such as the maximum duration of the advertising slots, the percentage of national production and the obligation to broadcast events of general interest and public welfare campaigns, as well as the provisions regarding audiovisual accessibility. Among the most relevant changes proposed by the new law are: the modification of the limit of media concentration in a natural or legal person going from three to eight authorizations for radio and broadcast television in the LSCA; the elimination of the complex institutional structure de-

8 The process began in the government of José Mujica and ended in the last year of Tabaré Vázquez's second term.

9 The Honorary Advisory Commission for Audiovisual Communication Services (CHASCA) was installed in October 2017, almost three years after the law was passed, but the Audiovisual Communication Council, the central entity for the application of the law and to which Chasca was to report, was never appointed.

signed¹⁰ in the LSCA; the elimination of the fee that the channels had to pay for licences and use of the radio spectrum, which nullifies the Promotion Fund that the LSCA created.

1.6. Digital and mobile connectivity infrastructure

The percentage of internet users continues the growth trend that had been registered in previous years. According to the report *Informe del Internauta Uruguayo*, conducted by Radar Group, 93% of the population of all ages use the Internet (Montevideo Portal, 2020). This number is two percentage points more than in 2019. It also notes a reduction in the digital divide with regard to age and socio-economic status. By 2020 the use in the highest socioeconomic levels reached 99% while in the lowest levels it reached 90%. With respect to age ranges, there is a growth in users between 0 and 5 years old (more than 75%) and also in those over 65 years old, which reaches 76% (Montevideo Portal, 2020; Radio Uruguay, 2021).

The same report reveals that almost 60% of the devices used to connect to the internet in homes are smartphones and smart TVs, the remaining 40% is distributed among other devices such as tablets, laptops and desktop computers. In addition, there is an increase in the frequency of internet use in the year 2020 with an average connection of six hours per day. Only 2% of users declared not to connect in the last 24 hours, when in the previous year that percentage reached 10%. These data are consistent with the pandemic situation (Montevideo Portal, 2020; Radio Uruguay, 2020). On the use of the internet for entertainment and television consumption, another report reveals that 72% of the adult population used the internet to watch TV or listen to music (CIFRA, CEDU, 2020).

10 One of the criticisms here was that the roles and competences of different institutions overlapped.

2. Analysis of the Year: National and Ibero-American Premiere Fiction on broadcast television

Table 1. Fictions aired in 2020 (national and imported; premiere, reprises and co-productions)

PREMIERE NATIONAL TITLES – 1

TNU - 1

1. *C+* (series - Uruguay)

CO-PRODUCTIONS – 1

Canal 4 - 1

2. *Los Internacionales* (series- Argentina, Colombia)

PREMIERE IMPORTED TITLES OBITEL – 14

Canal 4 – 1

3. *100 Días Para Enamorarse* (soap opera- Argentina)

Saeta – 1

4. *Jesús* (soap opera– Brazil)

Teledoce – 10

5. *Monzón* (series- Argentina)
6. *Huérfanos de su Tierra* (soap opera- Brazil)
7. *Nuevo Sol* (soap opera- Brazil)
8. *Partes de Mí* (soap opera- Brazil)
9. *Salve al Rey* (soap opera- Brazil)
10. *Suerte de Vivir* (soap opera- Brazil)
11. *Qué Vida Buena* (soap opera – Brazil)
12. *Casa de Muñecos* (soap opera- Chile)
13. *Cuna de Lobos* (soap opera- Mexico)
14. *Soltero con Hijas* (soap opera- Mexico)

TNU – 2

15. *Servir y Proteger* (series – Spain)
16. *Bajo Sospecha* (series – Spain)

PREMIERE IMPORTED TITLES NO OBITEL– 24

Canal 4 – 9

17. *4 Familias en 1* (series – USA)
18. *Médicos de Guardia* (series – USA)

19. *Policía del Futuro* (series – USA)
20. *Un Médico Brillante* (series – USA)
21. *Alas Rotas* (soap opera – Turkey)
22. *Amor y Venganza* (soap opera – Turkey)
23. *Cennet* (soap opera – Turkey)
24. *De los Labios al Corazón* (soap opera – Turkey)
25. *Gulperi* (soap opera – Turkey)

Saeta – 6

26. *FBI* (series – USA)
27. *Coraje de Mujer* (soap opera– Turkey)
28. *Flores de Cristal* (soap opera – Turkey)
29. *Meryem* (soap opera – Turkey)
30. *Sureya* (soap opera – Turkey)
31. *Y Tú Quién Eres* (soap opera – Turkey)

Teledoce – 12

32. *Código Negro* (series – USA)
33. *Hudson y Rex* (series – Canada)
34. *New Amsterdam* (series – USA)
35. *Quantico* (series – USA)

TNU – 5

36. *Fargo* (series – USA)
37. *Asesinatos de Midsomer* (series – United Kingdom)
38. *Genius: Einstein* (series – USA)
39. *Genius: Picasso* (series – USA)
40. *El Cuento de la Criada* (series – USA)

RERUNS OBITEL TITLES - 5

Canal 4 – 3

41. *Casados con Hijos* (series - Argentina)
42. *Los Nuevos Simuladores* (series - Mexico)
43. *Graduados* (soap opera – Argentina)

TNU – 2

44. *Ernesto. Exterminador de Seres Monstruosos* (series – Uruguay, Brazil)
45. *Todos Detrás de Momo* (series – Uruguay)

TOTAL PREMIERE NATIONAL TITLES: 1

TOTAL PREMIERE OBITEL TITLES :15

TOTAL PREMIERE TITLES (NATIONAL AND OBITEL):16

Table 1 reveals the sharp decline in the supply of Ibero-American premieres. This phenomenon must be understood within the programming strategies of the channels that, as seen in Graph 2, have opted for the expansion of entertainment programs, with the purchase of some formats for local realization or the import of original versions. Consequently, the Ibero-American premiere titles were only 16 which represents a sharp drop compared to the previous year (27 premieres).

The fiction offer for release in 2020 was completed with ten Turkish productions and some American (21 titles, of which nine are premieres). Teledoce was the channel that aired more Ibero-American premieres; Saeta premiered only one and instead offered five of the ten Turkish fictions; the others were offered by Canal 4.

As for the reruns, Canal 4 is the one that used this strategy the most to cover hours of programming during the last years. Thus, *Casados con Hijos* is systematically repeated in the programming of this channel. TNU repeated two national productions.

Table 2. Fiction Premiere in 2020: Countries of Origin

Country	Titles	%	Chapters/ Episodes	%	Hours	%
NATIONAL (total)	1	6.2	125	13	46:52:30	9
OBITEL COUNTRIES (total)	14	87.5	845	86	487:49:15	90
Argentina	2	12.5	22	2	14:06:45	3
Brazil	7	43.7	532	54	364:24:00	68
Chile	1	6.2	53	5	37:11:15	7
Colombia	0	0.0	0	0	00:00:00	0
Ecuador	0	0.0	0	0	00:00:00	0
Spain	2	12.5	155	16	16:50:00	3
Mexico	2	12.5	83	8	55:17:15	10
Peru	0	0.0	0	0	00:00:00	0
Portugal	0	0.0	0	0	00:00:00	0
Uruguay	1	6.2	125	13	46:52:30	9
Venezuela	0	0.0	0	0	00:00:00	0
CO-PRODUCTIONS (total)	1	6.2	8	1	04:53:15	1
Uruguayan coproductions	0	0.0	0	0	00:00:00	0
Co-productions Obitel countries	1	6.2	8	1	04:53:15	1
GRAND TOTAL	16	100	978	100	539:35:00	100

Source: *Obitel Uruguay*

One of the most significant data information contained in Table 2 is the volume of hours devoted to Ibero-American premiere fictions: 539:35 hours. The data highlights the sharp drop in the presence of Ibero-American fiction on Uruguayan screens in 2020, with a decrease of almost 50% compared to the 968 hours of 2019, when we already noted the downward trend that had been occurring in previous years, but not with the acute degree that is shown here (Sánchez, Gadea, 2020, p. 332).

As for the composition of the offer, it can be observed the predominance of Brazil as a supplier (7 titles with 70% of the hours) and the scarce presence of Argentinian fiction, not only for the number of titles, but also for the scarce participation in terms of number of chapters (22) and volume of hours (3% of the total). This is a radical change. Historically the images of the Argentinian soap opera occupied the local screen and that space has been overtaken by the Turkish soap opera.

Table 3. National and Ibero-American fiction formats

Format	National						Ibero-American						
	Titles	%	C/ E	%	H	%	Titles	%	C/ E	%	H	%	
Soap opera	0	0.0	0	0.0	0:00:00	0.0	11	73	677	79	463:09:00	94	
Series	1	10	0	125	10	46:52:30	0	4	27	176	21	29:33:30	6
Miniseries	0	0.0	0	0.0	0:00:00	0.0	0	0	0	0	0:00:00	0	
Telefilm	0	0.0	0	0.0	0:00:00	0.0	0	0	0	0	0:00:00	0	
Unitary	0	0.0	0	0.0	0:00:00	0.0	0	0	0	0	0:00:00	0	
Docudrama	0	0.0	0	0.0	0:00:00	0.0	0	0	0	0	0:00:00	0	
Total	1	10	0	125	10	46:52:30	0	15	10	853	10	492:42:30	10

Source: Obitel Uruguay

National fiction was reduced to an educational fiction series, with 125 chapters and accounted for 9% of the total hours devoted to premiere fiction, which is an exception to the records of previous years. In this case the format was that of the series, but most Ibero-American fictions adopted that of the soap opera.

Table 4. The 10 most watched titles on broadcast television

Title	Channel	TV Producer	Format/genre	Nº of chap/ep (in 2020)	Time slot	Rating	Share	
1	<i>Nuevo Sol</i>	Teledoce	Rede Globo	Soap opera	41	Prime Time	8.7	13.9
2	<i>Cuna de Lobos</i>	Teledoce	Televisa	Soap opera	25	Prime Time	7.8	12.8
3	<i>Suerte de Vivir</i>	Teledoce	Rede Globo	Soap opera	79	Afternoon	7.5	15.6
4	<i>¡Qué Vida Buena!</i>	Teledoce	Rede Globo	Soap opera	141	Afternoon	7.1	16.1
5	<i>Huérfanos de su Tierra</i>	Teledoce	Rede Globo	Soap opera	85	Prime Time	6.5	11.3
6	<i>Casa de Muñecos</i>	Teledoce	Mega	Soap opera	53	Night	5.9	11.9
7	<i>Partes de Mí</i>	Teledoce	Rede Globo	Soap opera	50	Afternoon	5.4	11.5
8	<i>Jesús</i>	Saeta	Record TV	Soap opera	118	Night	5.0	14.9
9	<i>Salve al Rey</i>	Teledoce	Rede Globo	Soap opera	18	Afternoon	4.9	11.7
10	<i>Soltero con Hijas</i>	Teledoce	Televisa	Soap opera	58	Afternoon	4.2	10.7
Total productions: 10			Foreign scripts: 10					
100%			100%					

Source: Obitel Uruguay

The most relevant fact that the table shows is that for the first time in the history of Obitel Uruguay, Argentine fiction is not in the *top ten*. Seven of the fictions are Brazilian and almost all of Globo. The biblical soap opera remains in the *top ten* with a Record TV title, *Jesús*. The remake of the Mexican soap opera *Cuna de Lobos* ranked second (*rating* 7.79 and *share* of 12.77) and the only Chilean title of the year, *Casa de Muñecos*, also appears in the *top ten*.

However, the main aspect that this table offers us is not so much its composition, but the low *rating* that these titles reached. The highest barely reached 8.16 points in *Nuevo Sol* and the largest share was obtained by *¡Qué Vida Buena!* with 16.14%. This noticeable

decline also affects fictions of other origins. Thus, the Turkish soap operas this year met the same fate as the Ibero-American ones: the most viewed was *Y Tú Quién Eres* with 8.14 *rating* points. In previous reports we pointed out that some Turkish titles surpassed the *rating* of some Ibero-American titles. This trend was interrupted in 2020, although the *share* of Turkish fictions as a whole tended to be larger, showing that they captured more audience. American premiere fictions did not perform better and could not surpass six *rating* points.

Table 5. Audience profile of the 10 most viewed titles: gender, age, socio-economic status

	Titles	Channel	Gender %		Socioeconomic status %				
			Women	Men	A+A-	M+	M	M-	B+B-
1	<i>Nuevo Sol</i>	Teledoce	63.21	36.79	13.96	16.35	18.55	14.11	37.02
2	<i>Cuna de Lobos</i>	Teledoce	63.79	36.21	16.50	10.35	29.66	14.19	29.31
3	<i>Suerte de Vivir</i>	Teledoce	68.16	31.84	9.30	16.17	31.26	20.75	22.51
4	<i>Qué Vida Buena</i>	Teledoce	65.65	34.35	11.03	12.70	18.84	30.06	27.37
5	<i>Huérfanos de su Tierra</i>	Teledoce	65.77	34.23	14.94	13.54	20.64	17.31	33.57
6	<i>Casa de Muñecos</i>	Teledoce	67.71	32.29	13.14	13.02	16.78	12.04	45.02
7	<i>Partes de Mí</i>	Teledoce	61.61	38.39	9.79	14.63	20.45	22.99	32.15
8	<i>Jesús</i>	Saeta	74.66	25.34	10.79	19.07	23.06	10.39	36.69
9	<i>Salve al Rey</i>	Teledoce	66.71	33.29	11.11	14.85	13.75	17.68	42.62
10	<i>Soltero con Hijas</i>	Teledoce	65.09	34.91	10.35	10.66	12.25	20.14	46.60

	Titles	Channel	Age groups %						
			4-11	12-17	18-24	25-34	35-49	50-59	60+
1	<i>Nuevo Sol</i>	Teledoce	7.58	7.23	6.80	7.98	27.93	13.73	28.74
2	<i>Cuna de Lobos</i>	Teledoce	8.88	7.94	5.30	13.80	21.53	10.23	32.33
3	<i>Suerte de vivir</i>	Teledoce	7.88	5.84	5.03	15.43	18.13	9.27	38.41
4	<i>Qué Vida Buena</i>	Teledoce	5.31	5.57	4.24	12.27	18.80	10.54	43.27
5	<i>Huérfanos de su Tierra</i>	Teledoce	4.34	5.63	4.73	13.28	22.76	10.25	39.00
6	<i>Casa de Muñecos</i>	Teledoce	6.85	8.89	5.01	9.55	24.69	12.11	32.90
7	<i>Partes de Mí</i>	Teledoce	4.48	6.38	5.41	12.91	17.73	14.35	38.73
8	<i>Jesús</i>	Saeta	5.59	6.89	4.97	11.93	14.48	16.81	39.32
9	<i>Salve al Rey</i>	Teledoce	9.71	9.56	5.77	7.09	20.96	12.35	34.55
10	<i>Soltero con Hijas</i>	Teledoce	10.08	7.54	6.27	7.67	20.53	6.45	41.45

Source: *Obitel Uruguay* on data from Kantar Ibope Uruguay

The composition of the audience of *the top ten* repeats the traits already observed in previous reports: predominance of female audiences and percentages around 36% of men; higher concentration of audience in low socioeconomic status and in those over 60 years. However, there is a slight increase in the percentages in the range of 4 to 11 years and 12 to 17 years.

3. VoD Monitoring 2020

3.1. VoD Market platforms

In the pandemic context, there has been an increase in subscriptions to *streaming* platforms and content consumption for entertainment on any platform (see Table 3). While there is a growth in subscriptions of those platforms that have come to the country in recent years, this did not affect the number of subscribers to Netflix, because its users also subscribed to other platforms such as HBO GO and Amazon Prime.

The market movement on these platforms has a strong opacity. Information is in the hands of companies and it is difficult to weigh profits as well as consumer trends in each of them. Indirectly, through the taxes (VAT plus INR), it is possible to look at the volume of money at stake. In 2019, US\$ 24 million were raised from audiovisual content platforms and in 2020 the amount was around US\$ 19 million (Alcuri, Silva, 2021).

3.2. Analysis of VoD in 2020: national and Ibero-American premiere fiction

Table 6. National and Ibero-American fictions in 2020 on VoD systems

NATIONAL PREMIERE TITLES	IBERO-AMERICAN PREMIERE TITLES	CO-PRODUCTIONS
<p>UN3TV (on YouTube) – 1</p> <p>1. <i>El Último Youtuber</i> (series web – Uruguay)</p>	<p>Amazon Prime – 6</p> <p>2. <i>Madres, Amor y Vida</i> (series – Spain)</p> <p>3. <i>Desaparecidos</i> (series – Spain)</p> <p>4. <i>El Cid</i> (series – Spain)</p> <p>5. <i>Pequeñas Coincidencias T2</i> (series – Spain)</p> <p>6. <i>El Presidente</i> (series – Chile)</p> <p>7. <i>Cómo Sobrevivir Soltero</i> (series – Mexico)</p> <p>Claro TV – 2</p> <p>8. <i>R</i> (series -Mexico)</p> <p>9. <i>Hijos de su Madre</i> (series - Mexico)</p> <p>Flow - 5</p> <p>10. <i>Tony</i> (mini series – Argentina)</p> <p>11. <i>Adentro</i> (series web – Argentina)</p> <p>12. <i>Lumelia T2</i> (series – Spain)</p> <p>13. <i>Post Mortem</i> (series – Argentina)</p> <p>14. <i>Pepper Todo por un Like</i> (series – Argentina)</p> <p>HBO GO – 3</p> <p>15. <i>La Unidad</i> (mini series – Spain)</p> <p>16. <i>Patria</i> (mini series – Spain)</p> <p>17. <i>30 Monedas</i> (mini series – Spain)</p>	<p>Netflix – 4</p> <p>54. <i>Alguien Tiene que Morir</i> (mini series – Spain, Mexico)</p> <p>55. <i>White Lines</i> (series – Spain, United Kingdom)</p> <p>56. <i>Narcos México T2</i> (series – USA, Mexico)</p> <p>57. <i>No te Puedes Esconder</i> (series- Spain, Mexico)</p> <p>UN3 TV (on YouTube) – 1</p> <p>58. <i>Fehler 78</i> (series web – Argentina, Spain, Uruguay)</p>

NATIONAL PREMIERE TITLES	IBERO-AMERICAN PREMIERE TITLES	CO-PRODUCTIONS
	<p>Movistar + - 6</p> <p>18. <i>El Embarcadero</i> T2 (series – Spain) 19. <i>La Línea Invisible</i> (mini series – Spain) 20. <i>Mira lo que Has Hecho</i> T3 (series – Spain) 21. <i>Antidisturbios</i> (mini series – Spain) 22. <i>Nasdrowia</i> (mini series – Spain) 23. <i>Dime Quien Soy</i> (series – Spain)</p> <p>Netflix – 27</p> <p>24. <i>Puerta 7</i> (series - Argentina) 25. <i>Casi Feliz</i> (series - Argentina) 26. <i>Coisa Mais Linda</i> T2 (series – Brazil) 27. <i>3% T4</i> (series – Brazil) 28. <i>La Venganza de Analia</i> (series – Colombia) 29. <i>La Reina de Indias y el Conquistador</i> (series – Colombia) 30. <i>Chichipatos</i> (series – Colombia) 31. <i>Amar y Vivir</i> (series – Colombia) 32. <i>El Robo del Siglo</i> (mini series – Colombia) 33. <i>100 Días para Enamorarnos</i> (series – USA Hispanic production) 34. <i>Las Chicas del Cable</i> T5 (series – Spain) 35. <i>Elite</i> T3 (series – Spain) 36. <i>La Casa de Papel</i> T4 (series – Spain) 37. <i>Valeria</i> (series – Spain)</p>	

NATIONAL PREMIERE TITLES	IBERO-AMERICAN PREMIERE TITLES	CO-PRODUCTIONS
	<p>38. <i>Perdida</i> (series – Spain) 39. <i>Alta Mar</i> T3 (series – Spain) 40. <i>Memorias de Idhún</i> (series – Spain) 41. <i>Los Favoritos de Midas</i> (series- Spain) 42. <i>El Desorden que Dejas</i> (series – Spain) 43. <i>La Valla</i> (series – Spain) 44. <i>Diablero</i> T2 (series – Mexico) 45. <i>La Casa de las Flores</i> T3 (series – Mexico) 46. <i>El Dragón. El Regreso de un Guerrero</i> T2 (series – Mexico) 47. <i>La Piloto</i> T2 (series – Mexico) 48. <i>Control Z</i> (series – Mexico) 49. <i>Historia de un Crimen. La Búsqueda</i> (mini series – Mexico) 50. <i>Oscuro Deseo</i> (series – Mexico)</p> <p>NSNOW – 3</p> <p>51. <i>Campamento Albanta</i> (mini series – Spain) 52. <i>Cromo</i> (mini series – Argentina) 53. <i>La Otra Mirada</i> (series – Spain)</p>	
Total: 1	Total: 52	Total: 5
GRAND TOTAL: 58		

Source: Obitel Uruguay

On the contrary to what happens with broadcast television, the platforms increase the offer of Ibero-American productions. In 2020, 58 titles were offered, almost half of Spanish origin. The other two countries with the most titles were Mexico and Argentina. Netflix continued to be the platform that provided more Ibero-American serial fiction and with the most variety of origins.

National fiction on VoD appeared in two web series: *El último Youtuber* and *Fehler 78*, both available on UN3TV and to which we will refer in the next section.

Table 7. Fiction premiere in 2020 on VoD: countries of origin

Country	Titles	%
NATIONAL (total)	1	1.7
OBITEL COUNTRIES (total)	52	89.7
Argentina	7	12.1
Brazil	2	3.4
Chile	1	2.7
Colombia	5	8.6
Spain	26	44.8
USA (Hispanic production)	1	1.7
Mexico	10	17.2
Peru	0	0.0
Portugal	0	0.0
Uruguay	1	1.7
Venezuela	0	0.0
CO-PRODUCTIONS (total)	5	8.6
Uruguayan coproductions	1	1.7
OBITEL inter-country co-productions	4	6.9
GRAND TOTAL	58	100

Source: *Obitel Uruguay*

4. Fiction and audience engagement in digital environments

In 2020 TV channels continued not using digital platforms and social media to expand the activity of their audiences. Private channels renewed their websites, but the strategy for the VoD consumption of their fictions remained the same: the chapters were available on their websites after they were aired and were removed once the title came to an end. Nor can be highlighted the activity on its social networks to create *engagement* and audience participation related to its main fiction titles.

However, the public channel TNU aired a national fiction, the only premiere of the year, which is a cross-platform series. It is an educational fiction *C+ Transmedia Marathon* of 125 chapters (of 15 minutes approximately) and it is a project promoted by the National Administration of Public Education (ANEP), Plan Ceibal¹¹ and TNU. The following points are developed in this case.

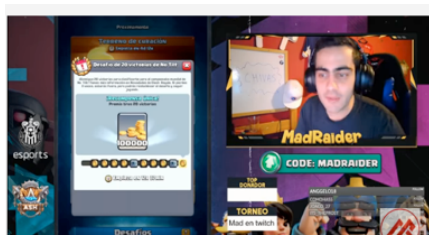
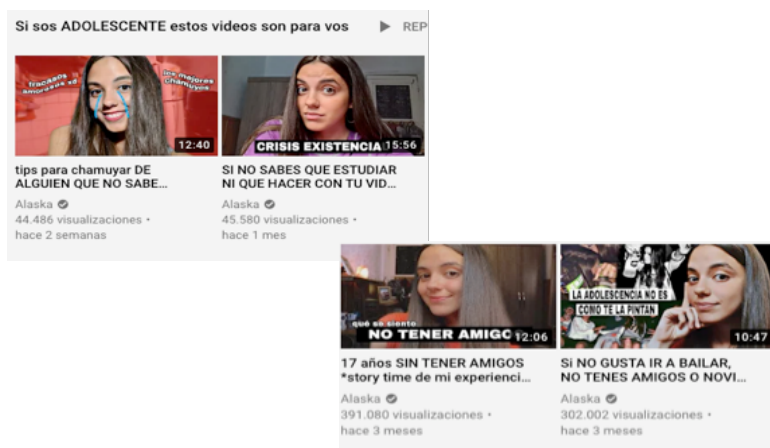
4.1 Digital expansion proposals

C+ Maratón Transmedia appears in the pandemic context as a result of the need of public education institutions to reach students throughout the country with a proposal that was not only accessible through the *online* platforms of the Plan Ceibal. The objective was to accompany students and their families in the pandemic context and “provide tools that enhance a new learning environment from home” (Plan Ceibal, June, 2020).

It targets an adolescent audience by integrating the new forms of audiovisual consumption that are part of this sector of the audience,

11 The Plan of Educational Connectivity of Basic Computing for Online Learning (Plan Ceibal) is the socio-educational project inspired by Negroponte’s One Laptop per Child, which was promoted in Uruguay since 2007 for primary and secondary education.

not only in the possibilities of accessing the series, but also in the contents of its episodes and its narrative thread. The program is hosted by a young Uruguayan *youtuber* named Alaska (Gimena Sauchenco who has a published book, more than 100,000 followers on Instagram and more than 200,000 on YouTube and Tik Tok) and another popular young man in the virtual space, the *gamer* Mad Raider (Nicolas Studer). Two referents of the youth sector are united, with two different models of content that are consumed in the *online* environment: that of video games of the gamer environment and that of videos about adolescent world situations and current issues from the youth perspective.



mage source: Alaska's channel on YouTube, 2021, and Man Raider's channel on YouTube, 2021.

The series was aired on television but also on Facebook, Instagram, YouTube and Spotify. The website gives access to the episodes on YouTube, offers subscriptions to their contents and allows interaction with the program through the button “Unite the C+ legion”. In addition to that, it has a section for middle school teachers with guidance on ways to articulate the contents of the series with the classroom work. A link to a *webinar* provides previews of the series and a repertoire of resources to delve into the topics (Cmas, 2020).

It manages to present in a single content, an educational proposal, articulated in a fictional narrative that includes, both inside and outside the narrative universe, ways of consumption and participation of the young audience in digital environments. The story, which takes place at present, poses as characters Alaska and Mad Raider, from their personalities and real trajectories. One day, while preparing the contents to upload to their channels, they are convened by an anonymous message to the Alpha Hall, a mysterious place full of technology that evokes some kind of headquarters of control and that was built “to preserve knowledge”. There, Mrs. Alpha, a computer voice, summons them to carry out the mission of learning and preserving the knowledge of the misdeeds of the Watchmaker, a kind of villain who tries to hack the world’s knowledge bases. They are invited to ask the support of their social media followers to solve the puzzles that are posed. Alaska and Mad Raider are guided through a series of contents that appear on the computer of the Alpha Room. These contents are usually educational fragments on the subject in question, sometimes with testimonies of specialists, scientists or real teachers from Uruguay.

Most of the narrative takes place inside the Alpha Room, but the story is also constructed by adding the videos that Alaska and Mad Raider upload to YouTube, where they recount what is happening to them and how they feel.

4.2. An educational proposal that includes social interactivity

From the social networks (Facebook, Instagram and Twitter) they invite the audience to become part of “C- guidores” and to participate in interactive playful activities with questions about the topic discussed in each episode. In some cases they raffled a day of visit to the Alfa Hall and the winners were part of a program with question and answer games with the youtubers.

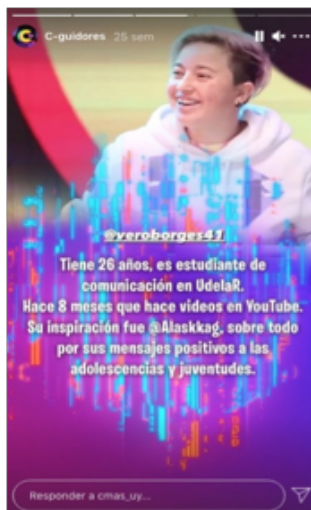


Image Source: Cmas Instagram Profile, 2021

The second cycle of the program changed its structure, with more spaces for audience interaction. Instead of Mad Raider as Alaska's partner, she is accompanied by Pablo Arnoletti, former singer of the band *Márama*¹². It maintains the fictional framework and encourages interviews on set with young people who promote educational, environmental, artistic, business or sports projects. It also has question and answer games posted on social networks.

4.3. Emerging fiction productions

In previous editions we have reported web series made by emerging directors and production companies that were broadcast on Youtube. In 2020 two web series were shown: *El Último Youtuber* and *Fehler 78*, both on UN3TV.

In a retrospective view at the web series produced in Uruguay, surveyed in the *Obitel Yearbooks*, it is possible to identify a gradual quality growth. This is clear in the layout of the stories and their technical resolution, with more sophisticated productions, which could show a greater degree of resources or expertise of the filmmakers. The first web series belonged to the *mockumentary* genre, then it moved to an audiovisual language that abandons the *low cost* appearance as a narrative strategy. Thus, *El Maravilloso Parque Hoolister* (2018) meant a shift towards suspense and *Hotel Romanov* (2019) presented a story that left behind the narrative elements of the false documentary and got fully into suspense, with unusual characters and situations with a certain amount of humour and irony.

12 *Márama* is an Uruguayan *cumbia* youth band, popular at the national and regional level.

The 2020 web series, *Fehler 78*¹³, repeats that same formula but with situations in which the suspense is emphasized and the humour is presented in a somewhat less obvious way. It is set in a dystopian future in which some kind of virus seems to have hit the country and the only ones left healthy are a group of five young people (with only one woman), who live locked up in a *motorhome* and interact with a computer program, with irreverent attitude, which gives them data on the environmental conditions.

With regard to *El Último Youtuber*, it is a science fiction *web series*¹⁴ with nine chapters of six minutes each. The story, told in a humorous way, is also set in a dystopian future, this time of zombie apocalypse. In a ruined Montevideo full of living dead, the only survivors seem to be three young men living together in a flat. The protagonist, an inveterate *youtuber* named Victor spends his days posting videos that portray his daily life between jokes that cause the weariness of his peers. The story presents a turning point when they meet Fernanda, a still healthy girl, who while looking for her boyfriend turned zombie, agrees to share the house with these boys.

A differential aspect presented by *El Último Youtuber*, is its aim to exploit other platforms for narrative expansion. While it did not have a significant development, the official Instagram profile of the series offered some videos that would be uploaded by the main character, Victor. These videos of just a few minutes, add situations to what happens in the series.

13 It is a co-production of Argentina, Spain and Uruguay in which referents of the production company Finoli Films participate. The company has been producing this type of web series since 2016.

14 Martín De Benedetti's project was the winner of the 2018 Film and Audiovisual Development Fund of the National Institute of Cinema and Audiovisual (ICAU).

These emerging fictions were shown on the UN3 TV channel. On the one hand this shows the establishment of this platform as an actor that expands the possibilities of exhibition of emerging Uruguayan projects. On the other hand, it shows the disregard of broadcast channels and national cable companies towards national fiction projects. They do not seek to include in their virtual platforms this type of content designed for web consumption.

5. Highlights of the Year

Data analysis related to broadcast television leads us to conclude that the highlight of 2020 was the collapse of the *rating* and *share* of Ibero-American television fiction in particular, but also of fictions of other origins. In a diachronic perspective of the last five years we can see that in 2015 the *rating* values of the Ibero-American *top ten* were between 20.2 and 9.7 points. It was the year of the arrival of the Turkish soap opera and titles premiered that year such as *Las Mil y Una Noches*, *Qué Culpa Tuvo Fatmagul* and *Sila*, reached *ratings* of 20 and 22 points and their *share* exceeded 30 points (Sánchez Vilela, 2016). That was the last year with such high standards for serial fiction. In the last three years the *ratings* of the ten most viewed titles ranged between 14 and 8 points, while in 2020 the highest value was 8.16. The same fate befell the Turkish and the American fiction.

This phenomenon of declining audiences is accompanied by a sharp reduction in the supply of fiction. The total number of television fiction offered in 2020, of all origins and including reruns, was 42 titles. In previous years that amount corresponded only to the Ibero-American premiere titles. This data allows us to weigh the size of the decline.

It is true that the broadcast television audience fell; however, some specific programs, such as *Got Talent* and *Master Chef*, achieved high *ratings*. The question is then: why did this drop in fiction audiences occur?

It is possible to venture some hypothesis. The decline of the television fiction audience could be explained by supply reduction, added to the displacement of fiction towards the margins of *prime time*. The programs that obtained the highest ratings were those that were offered in *prime time*, between 7 pm and 10:30 pm, as has historically happened. But this year, that slot was intended for newscasts and entertainment, when the traditional combination was newscast-soap opera.

Likewise, the reduction in supply is explained by a confluence of factors: the continuity and expansion of a programming strategy – which has been established since 2013 and which aims at entertainment and the extension of time allocated to the newscast (three daily editions and a three-hour evening edition); the purchase of formats and local realization of the *reality* show in contest modality; the response to the health emergency situation that opted for programs alluding to the situation and executed with few resources (*Quédate en casa*, for example). At a time when the demand for content is increasing, the channels seem to leave the ground open of television fiction supply to the platforms.

6. Theme of the Year. Fiction in times of pandemic

To address this issue we have chosen to explore different manifestations that can account for the impact that the pandemic had in 2020 on the Uruguayan audiovisual industry. In this general framework we set out to identify the impact in fiction, inside and outside the traditional television scenario.

Covid-19 became a topic that crossed media and genres on the national panorama. The slogan “*Quédate en casa* (Stay at home)” promoted videos from home, programs on broadcast television held by the videoconferencing software Zoom, but also prompted more ambitious initiatives such as the Detour Festival¹⁵ which had a special section, “The year we lived with Coronavirus”, in which 25 short film pieces of very different genres (five of fiction) were presented. In the series category, *Emilia en Casa* was presented as a mini series web, multimedia and interactive of four episodes of four minutes each. The series tells the story of a 14 year old girl, who goes through quarantine with her parents and her cat. This production was supported by the Creative Fund 2020 of the National Research and Innovation Agency (ANII), created especially for the pandemic context and aimed at creative industries.

As for fiction, two aspects stand out. The first refers to the production of educational programs in order to support virtual and hybrid learning. On the national public channel, TNU, two educational programs were broadcast for this purpose: one of non-fiction content, *Ta, tiempo de aprender*, and the other a fiction, *C+Maratón Transmedia*, which we dealt with in section 4. The second aspect is the strong momentum experienced by the audiovisual industry, with the development of international projects carried out in Uruguay, taking advantage of the favourable health situation of the country in comparison with (that of) the region.

15 Detour, New Film Festival is an event that since 2013 is dedicated to emerging national cinema and that has also included the category series and web content.

6.1 Audiovisual industry situation in pandemic: a scenario of opportunities

The pandemic led to an abrupt interruption of audiovisual productions of various kinds. As estimated by GremioCine, some 20 ongoing productions, including films, commercials and series, many of them international projects, were suspended (Solomita, 2020). The government did not order the suspension of filming, but the sector did it itself. However, after a brief period of inactivity there was a strong boost of the audiovisual industry.

The activity was gradually relaunched from May and in June, permits for filming in public spaces were allowed. The confluence of three groups, the Chamber of Advertising Production Companies (CEPPU), the Association of Film Producers and Filmmakers of Uruguay (Asoprod), the Union of Workers and Professionals of Cinema and Audiovisual, GremioCine, in association with the Ministry of Labour and Social Security, made it possible to draw up an operating protocol: the Health and Safety Plan for the Audiovisual Industry. The protocols were reviewed on a permanent basis and were very thorough in covering all stages of work and detailing the corresponding measures for each type of activity.

The speed up occurred first in advertising¹⁶ and then with international productions of fiction, mainly from Amazon Prime and HBO. The health context of the country with controlled Covid and the gradual opening of almost all activities, made Uruguay an attractive place for production services and filming. In short, a scenario of opportunities arose.

¹⁶ According to Santiago López, secretary general of Asoprod and director of Cimarrón Cine, in July and August the advertising had a record sales result (La Diaria, 2020).

As a quick overview: of the 148 advertisements, mostly aimed at the foreign market, 78% occurred during the pandemic; in film, television and other contents, of the 36 shoot or being shot, 25 were carried out after the health emergency was declared (Staricco, 2020).

The effervescence experienced by the audiovisual industry, that continues in 2021, showed the professional capacities towards the demands of large international projects. Some tools that were already in use before, developed their potential for teleworking. Thus, taking advantage of the very good connectivity of the country, the use of a software that through a streaming service allows remote direction from anywhere in the world, in real time and in contact with the local team that runs the filming, was exploited.

However, this situation of intense activity in the sector is explained, not only by the conditions of exceptional health, coupled with political stability, but also by a development of actions by state and private actors. Without pretension of exhaustiveness, we will try to give an account of this articulation that brought a certain enthusiasm in the possibilities for a national audiovisual industry and the development of fiction.

One of the lines of action started in previous years was the Uruguay Audiovisual Program (PUA), a public policy instrument that was announced in December 2018, in two directions: one to encourage national production and the other to international production (see section 1.4 of this chapter). The central purpose is to attract large audiovisual projects, including advertising. The first television fiction to benefit from this program was Keanu Reeves' *Conquest* series for Netflix, made by the production company Salado in 2019. From there other projects were planned for being implemented in 2020 and, after the pandemic was controlled, they were sped up in May. Some of the most relevant television fiction are: *Sentença*, *Mañana do Setembro*,

Iosi, El Espía Arrepentido, Lov3, El Presidente, for Amazon; *Amsterdam* for HBO.

With regard to private actors, one of the most outstanding initiatives is that of the Reducto project¹⁷: an audiovisual production center of 10,000 m², with film studios, offices with different functionality and very good connectivity. This initiative carried out by Musitelli¹⁸, began its adventure with the purchase of the lot in 2016, but the biggest boost was in recent times. It brings together a cluster of companies working for international productions. In addition to Musitelli itself, post-production companies such as Colour or VFX Boat are based there; TRIM, a company that provides montage and montage assistance services for films and series; the production companies Cimarrón and Mediapro, among others. The total investment of the Reducto project would reach US\$ 8 million dollars¹⁹. The context of the pandemic did not stop the progress of the project but contributed to its development with filming, editing and other services, for series of powerful international platforms.

Beyond this encouraging outlook, the shutdown of activities from 13th March led to economic losses and unemployment[□] and highlighted some sector fragilities: most of the labour relations are non-dependent, with sole proprietorships or public limited companies, specific contracts, therefore it does not have the social security coverage that did support other sectors. The first two or three months of the health emergency was a major shock for the sector workers and for companies that had invested based on the international projects they had in hand.

17 See the official website of Reducto: <https://www.reducto.uy/es/uruguay/>

18 Musitelli is a family business, of the family of that name, practically the only supplier of equipment for audiovisual production that has been in activity since 1997.

19 Statements by Ernesto Musitelli (Amoroso S., June 2020).

The audiovisual sector in Uruguay creates around 1,500 direct jobs and another 3,500 indirect ones and exports on average US\$ 20 million annually. This information comes from official sources[□] which indicate the existence of 460 companies linked to the sector, mostly small and with an average workers' salary of \$53,000 (US\$ 1,200). In audiovisual budgets on average 55% corresponds to salaries and about 30% corresponds to services such as hospitality, catering, transportation, and consultants[□]. These data provide an approximation to the economic dimension of the sector, but this is an aspect that still needs to be studied in more depth in order to be able to weigh up the actions that will consolidate the development of the national audiovisual industry.

The promotion of Uruguay as an ideal place to film is driven by different public entities in confluence with organizations and investments of private actors, producers and service providers, in a fabric of alliances that had been built before the pandemic, enhanced by it, and that was reaffirmed as a government decision in 2020.

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11

VENEZUELA: FICTION ON HOLD

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Introduction

During 2020, the paralysis and recession of the television sector in Venezuela continued. No new fictions were produced by any open signal television (TV) channel. Spaces dedicated to fiction contents were occupied by imported productions or by reruns, such as the

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Venezuelan *telenovela* (soap opera) *La Viuda Joven*, originally released in 2011 by Venevisión with high audience levels. The only local production premiere that continued on the TV screen was the teen musical series *Carolay*, produced in 2019 by BGCreativos in the city of Maracaibo and broadcast by Venevisión. Some independent production companies developed and released contents on social platforms (YouTube), on international television networks or on streaming services. The latter is the case of the web series *Almas en Pena*, produced by RCTV International and by José Simón Escalona, who also was one of the scriptwriters along with Martin Hahn. Given the reduction of TV program offering in open signal and cable television, the number of users of Video on Demand (VOD) services increased, and Netflix showed one of the highest penetration rates, despite the severe limited access to internet in Venezuela.

1. The context of audiovisual services in Venezuela in 2020

The television offer in Venezuela during 2020 was made up, predominantly, by open signal channels belonging to the public sector, contrasting with the television landscape from a decade ago, when the television channels from the private sector prevailed, in quantity and scope.

Open signal television was positioned as the main entertainment option in the context of the quarantine, decreed in March 13, due to the arrival of the Covid-19 pandemic to the country. This turned out to be the cheapest alternative and the most easily accessible for people, given the drastic reduction of subscription TV (cable TV) offer, originated by the cessation of operations in Venezuela of the cable TV market leader company: the transnational DirecTV.

1.1 Open television in Venezuela

Chart 1. National open television channels and networks in Venezuela

Private broadcast / channel (9)	Public broadcast / channel (13)
Canal I	123 TV
Globovisión	ALBA TV
La Tele Tuya (TLT)	ANTV - Fundación Audiovisual Nacional de Televisión –
Meridiano Televisión	Ávila TV
Televen	ConCiencia TV
TV Familia	Corazón Llanero
Vale TV	Colombeia. La televisora educativa de Venezuela
Venevisión	Pdvsa TV
Vepaco 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
TOTAL CHAINS = 0	
TOTAL CHANNELS = 22	

Source: *Obitel Venezuela*

In 2020, no concessions were granted for new TV stations at the national level, in consequence, the open TV offer remained the same. There are 22 channels, of which 13 form part of the public sector offer and nine belong to the private sector. This situation reflects the policy orientation of Nicolás Maduro administration, as

well as his predecessor, Hugo Chávez, consisting in increasing the size of the government communication machine, in order to achieve a longer range and to impose the ideological and political messages of his project.

The government influence can also be seen in organizational structure of the media. For instance, Winston Vallenilla, who was the president of the state television channel, Tves, from 2014 to 2020, left the post to run as a National Assembly candidate, representing the government party, the United Socialist Party of Venezuela (PSUV), and he was replaced by his wife, the actress Marlene de Andrade, appointed by president Nicolás Maduro.

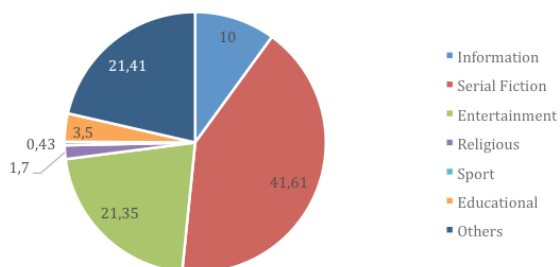
Graph 1. TV share and rating by channel

Chart 1 could not be made because of the lack of available information. The company Nielsen Venezuela, which was the only dedicated to register the TV share and rating in open signal, announced, in July 2020, its decision of shutting down operations in Venezuela, owing to:

problems importing *people meters* with new technology, cancellation of contracts by clients, lack of cash flow to cover payroll costs, continuing basic services disruptions (power, internet, etc.) and, recently, constraints placed upon 40% of our panel to have access to the TV signal (Producto, 2020, s/p).

Graph 2. Television genres and hours broadcasted by TV programming.

Genre broadcast	%
Information	10
Serial Fiction	41,61
Entertainment	21,35
Religious	1,7
Sport	0,43
Educational	3,5
Others	21,41
TOTAL	100,00



Source: *Obitel Venezuela*

Charts 2 shows that serial fiction (mainly represented by *telenovelas* and series) accounts for a substantial proportion of TV programming, reaching the top spot. The second place was reached by programs dedicated to entertainment, notable among them were magazines and talk shows; and the third place went to news programs. Data were obtained from the total analysis of two weeks of programming lineup from two of the most popular Venezuelan open TV signal channels, Venevisión and Televen. It is important to note that during those

two weeks, no exclusively political programs were registered, this issue was covered as part of the news programs.

1.1 Pay TV and VOD platforms in Venezuela

The main Venezuelan TV subscription companies that led the market in May 2020 were DirecTV, Cantv Televisión Satelital, Inter, Movistar TV and NetUno (Graterol, 2020). According to the National Commission for Telecommunications (Conatel), 236 operators provide pay TV services in Venezuela. Most of them serve regionally. In accordance with official data, there are 4.347.090 pay TV subscribers at the national level (Conatel, 2020, p. 13). DirecTV, company that used to control the largest share of the market (48,01%), gathered 2.086.844 subscribers. This company ended operations in Venezuela on May 19, 2020, after the US multinational company AT&T (owner of DirecTV) informed that it could not comply with the Venezuelan State requirements consisting in including the private channel Globovisión and the state channel Pdvsa TV as part of its TV offer, without violating the sanctions imposed by the US government to the Venezuelan government headed by Nicolás Maduro. Both TV channels had been sanctioned by the US Department of State and, therefore, no companies or enterprises that have US capital can maintain business relationship with them. This cessation of operations left an information and entertainment vacuum in the pay TV subscribers in Venezuela. It also impacted national TV channels, as Vale TV, that depended on Direct TV to broadcast their programs to the regions. In October, when the company's shares and equipment were sold, Simple TV was created.

Currently, in Venezuela is not possible to determine which pay TV programs are the most watched, because there is not any measurement company.

Venezuela has three national private channels that are only broadcast by pay TV: Venepius that belongs to Cisneros Organization, and it is the international signal of Venezuelan TV network Venevisión, which has three feeds: one for Venezuela, another for the United States and a third one for Latin America and Europe; IVC Network that belongs to Ole Communications and broadcast a general entertainment TV program; and Sun Channel that is a thematic channel and broadcast a variety program dedicated to world tourism.

Chart 2. Venezuelan pay TV Networks

Pay TV Chains in 2020
1) Ve Plus (entertainment), 2) IVC Network (entertainment), 3) Sun Channel (tourism)

Source: Obitel Venezuela

Even though VOD service in Venezuela has not grown steadily as in other countries, during 2020 an increase in the consumption of this platform was experimented due to, among other things, the Covid-19 pandemic and the closing of DirecTV. Thus, Netflix became the most demanded service. In March 2020, eight of the top ten most watched productions belonged to Netflix, including *Narcos* (2015), *The Witcher* (2019), *Chilling Adventures of Sabrina* (2018), and *La Casa de Papel* (2017). Additionally, Venezuelan people had access to other VOD services, such as HBO Go, Amazon Prime Video, Vivo

Play and RCTV (through its app. for tablets, smartphones, and PC) (Plataformas, 2020).

Chart 3. VOD services in Venezuela

Main VOD platforms active in 2020	Total
Netflix, Prime Video (Amazon), HBO Go (Warner Media), VIVO Play, RCTV (Grupo IBC), TNT Go, Paramount Channel Play	7

Source: Obitel Venezuela

1.3 Independent TV fiction production companies

Venezuela has several audiovisual production companies focused on developing made to order fiction for other countries. A good example of this is the serial fiction *Almas en Pena*, produced by RCTV International in 2020, whose first season has 13 episodes. As previously mentioned, it has been created by Martin Hahn and José Simón Escalona, and it narrates, in a creative and updated manner, horror stories from Latin America legends. This series is available on VOD platforms such as Amazon Prime Video and others. On its part, Quimera Producciones was producing the *telenovela Intriga tras Cámaras* in 2020, but the shooting had to be interrupted because of the pandemic, and it could not be broadcast that year as planned. Oduver Cubillán, through VePlus, exported to the United States the teen series *Carolay*, coproduced with BGCreativos. Other small production companies

made some serial fictions but on YouTube platform, among them we can mention: NeneFilms with the productions *A Pesar de Todo* and *Amor sin Tapabocas*; Flavio Andrés Lloreda Brojanigo with his teen series *Magicland*; Show Men Production Records with the teen mini-series *En el Salón*; Weapon Klath Film with the action series *Dealers*; and Benjamín Cohen with the second season of *¡Qué Clase de Amor!*, a micro web series (three chapters), whose first season was made in 2009 for the open signal channel Venevisión.

1.4 Funding sources of the audiovisual sector

The pandemic and the economic recession affecting Venezuela reduced the funding options for audiovisual productions. In September 2020, the Conatel announced the permanent receipt of audiovisual projects made by Independent National Producers and aimed at highlighting social values (Adrianza, 2020). The opening of this permanent receipt proved to be value as an idea to promote new contents in the context of the Covid-19 pandemic. However, there was no public information about the reception of this call, and neither was known the list of financed projects and the amounts allocated.

Additionally, a group of Venezuelan women filmmakers, based in different part of the world, created the Women Filmmakers Association of Venezuela Jeva in order to develop joint ideas to look for funding, as well as strategies to produce their audiovisual works.

Open signal TV channels included short messages related to Covid-19 prevention measures in their offer. Those lasted between 30 seconds and one minute, and were recorded from presenters, actors and journalists' houses.

1.5. Communication policies

The cessation of operations of the TV subscription company DirecTV impacted the propaganda machine of Nicolás Maduro's government, made up of a TV network financed by public funds, since most of the TV channels from this network did not have national coverage, and their signals could be received all around the country only through DirecTV.

The Supreme Court of Justice ordered the company to reestablish immediately its signal, and based on this argument the Conatel took possession of its equipment and facilities. Additionally, it designated an *ad hoc* board, chaired by the general director of this commission, Jorge Eliéser Márquez. Some senior executives from DirecTV were imprisoned for several months. The TV signal remained off air until October 2020, when it was partially restored, after the business group Scale Capital announced the acquisition of the shares and turned DirecTV into Simple TV.

Considering this television blackout as well as many years of stalemate, Nicolás Maduro's government reactivated, as an urgent measure, the project for Digital Terrestrial Television including 19 channels: four private TV stations (TLT, Meridiano Televisión, Venevisión and Televen); 13 channels financed by public funds (Venezolana de Televisión, Telesur, Tves, Corazón Llanero, 123 TV, Conciencia, Ávila TV, Vive TV, Alba TV, Colombeia, ANTV, TV FANB and Pdvsa TV); and two international channels belonging to the public sector of countries ideologically aligned with Nicolás Maduro administration (Russia Today from Russia and CGTn from China) (Conatel, 2020, p. 1). Furthermore, two programs: *Universidad en Casa* and *Cada Casa, Una Escuela*, mainly broadcast by public channels, were reactivated as a teaching resource to reinforce the system of distance education based on technologies, imposed by the Covid-19 pandemic.

During 2020, the Technical Norm for the Administration, Assignment, Monitoring, and Control of Resources from the Conatel Fund for Social Responsibility was reformed, establishing new criteria for the funding of audiovisual production projects and research projects, with resources coming from taxes paid by telecommunication operators. The main changes included were: the creation of a technical committee to evaluate and review the projects to be funded, the reduction of the evaluation time to 21 days, the support for the promotion and monitoring work for the projects receiving funding and the offer of training activities for audiovisual producers.

Digital and mobile connectivity infrastructure

The Covid-19 pandemic brought with it social isolation and this resulted in a change of entertainment consumption practices. By having to pass more time than usual at home, people found on different screens (TV, smartphones, tablets, Smart TV, PC) an ideal space for fulfilling their entertainment and education needs. Hence, according to data from Havas Media Group, to stay at home enjoying series and films (79%) and take various courses (26%) were some of the most recurrent activities during lockdown (Tendencias Digitales, 2020). Therefore, internet became the best ally to perform at home most of the activities that people used to carry out in other spaces:

Shows and events now take place through streaming, occasionally with simultaneous audiences, using different platforms such as Instagram, Facebook and YouTube. And initiatives to offer professional services, advice and counselling, free of charge or not, through internet, to deal with the in-

ability to access their clients and public are increasingly taking place as well (Tendencias Digitales, 2020. s/p).

In the specific case of Venezuela, that has one of the world's slowest connections, the number of internet users increased to 20,50 million in 2020. This means, sometimes, the use of two or three connections by the same user. Additionally, 23,21 million of cell phones connected to the web and 12 million of active social media users were counted, representing an increase of almost 9% compared to the previous year. Another important finding is the use of mobile devices by 81% of internet users to access social media (Shum, 2020). The growth in phone users contrasts with the number of Venezuelans who have migrated and have stopped using their phone lines. Indeed, during the Covid-19 pandemic in 2020, around 194.128 people left Venezuela, additional to those 5.642.960 that have already left the country since 2015 (Centro de Derechos Humanos UCAB, 2020).

Thus, during the lockdown in Venezuela, as said by the telephone company Telefónica Movistar, "data consumption has been massive, during the first five days the use of Netflix doubled and the use of social networks such as Twitter or WhatsApp increased by 40%" (El Universal, 2020 s/p). These data are consistent with those provided by We Are Social, which states that access to web contents through cell phone was 25%, representing an increase of 20% compared to the previous year; 73% of the total access to the web was done using a laptop or PC, but it experimented a drop of 4,4% compared to 2019; access through laptop totalized 3% showing a decrease of 21%, while other devices stayed at 0,05% as previously. Screens became the center for entertainment; therefore, it comes as no surprise that the use of platforms *Over the Top* (OTT) and VOD increased. The growth in internet connection, through mobile telephony, resulted from the decline of the quality of home internet provided by operators, such as the State com-

pany CANTV, whose internet service, called ABA, completely stopped working in several homes.

2. Analysis of the Year: Venezuelan and Ibero-American fiction premiere on open TV

Table 1. Fictions exhibited in 2020 (national, imported, premieres, reruns and co-productions)

<p>NACIONAL UNRELEASED TITLES – 1</p> <p>Venevisión – 1</p> <ol style="list-style-type: none"> 1. <i>Carolay</i> (Serie) <p>CO-PRODUCTIONS – 0</p> <p>OBITEL IMPORTED UNRELEASED TITLES – 11</p> <p>Venevisión – 3</p> <ol style="list-style-type: none"> 1. <i>Así en el Barrio Como en el Cielo</i> (Telenovela – Mexico) 2. <i>Un Bandido Honrado</i> (Series – Colombia) 3. <i>Siempre Tuya Acapulco</i> (Telenovela - Mexico) <p>Televen – 8</p> <ol style="list-style-type: none"> 4. <i>Lo Imperdonable</i> (Telenovela - Mexico) 5. <i>Mujeres al Limite</i> (Series - Colombia) 6. <i>Diomedes</i> (Serie - Colombia) 7. <i>Bolívar</i> (Telenovela - Colombia) 8. <i>Contigo Aprendi- La Nocturna</i> (Telenovela - Colombia) 9. <i>Tarde lo Conocí</i> (Serie - Colombia) 10. <i>Heidy, Bienvenida al Show</i> (Series - Argentina) 11. <i>El Hijo del Cacique</i> (Telenovela - Colombia) <p>NO OBITEL IMPORTED UNRELEASED TITLES– 6</p> <p>Televen – 3</p> <ol style="list-style-type: none"> 1. <i>Cumbres Borrascosas</i> (Miniseries - Italia) 2. <i>Apuéstale a la Vida</i> (Series - Rumania) 3. <i>Brusko: Una Mujer Desconocida</i> (Telenovela - Greece) <p>Tves – 2</p> <ol style="list-style-type: none"> 4. <i>Ertugrul</i> (Series - Turkey) 6. <i>Hechizada</i> (Series - United States) <p>Vale Tv – 1</p> <ol style="list-style-type: none"> 5. <i>Las Horas de mi Vida</i> (Series - Japan)
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RERUNS– 36

Venevisión – 21

1. *Natalia del Mar* (Telenovela - Venezuela)
2. *Harina de Otro Costal* (Telenovela - Venezuela)
3. *Vecinos* (Telenovela - Colombia)
4. *La Mujer Perfecta* (Telenovela - Venezuela)
5. *¿Que Clase de Amor!* (Series - Venezuela)
6. *Aunque Mal Paguen* (Telenovela - Venezuela)
7. *Mujercitas* (Telenovela – Venezuela)
8. *Acorralada* (Telenovela United States)
9. *Guerra de Mujeres* (Telenovela – Venezuela)
10. *La Rosa de Guadalupe* (One-off episode – Mexico)
11. *La Vida Entera* (Telenovela – Venezuela)
12. *Cosita Linda* (Telenovela – Venezuela)
13. *Amor Secreto* (Telenovela – Venezuela)
14. *La Viuda Joven* (Telenovela – Venezuela)
15. *Amor Urbano* (Miniseries – Venezuela)
16. *Mi Niña Amada* (Miniseries - Venezuela)
17. *El Amor Viene con Todo* (Telenovela USA)
18. *A Todo Corazón* (Series - Venezuela)
19. *Corazones Extremos* (Series - Venezuela)
20. *Robando Corazones* (Series - Venezuela)
21. *Cartas al Corazón* (One-off episode - Venezuela)

Televen – 15

22. *Tu Voz Estéreo* (Series - Colombia)
23. *Mis Tres Hermanas* (Telenovela Venezuela)
24. *Mi Corazón Es Tuyo* (Telenovela - Mexico)
25. *La Reina del Flow* (Telenovela - Colombia)
26. *Chica Vampiro* (Series - Colombia)
27. *Nora* (Telenovela -Venezuela)
28. *Nacer Contigo* (Telenovela - Venezuela)
29. *Guayoyo Express* (Telenovela - Venezuela)
30. *El Gato Tuerto* (Telenovela - Venezuela)
31. *Juana la Virgen* (Telenovela - Venezuela)
32. *Soy Luna* (Series - Argentina / Mexico)
33. *Cuando me Enamoro* (Telenovela - Mexico)
34. *Dulce Amargo* (Telenovela - Venezuela)
35. *Fuerza de Rescate* (Series – United States)
36. *El Chavo del 8* (Series - Mexico)

TOTAL OF NATIONAL UNRELEASED TITLES: 1

TOTAL OF OBITEL UNRELEASED TITLES: 11

TOTAL OF UNRELEASED TITLES (NATIONAL AND OBITEL): 12

Source: Obitel Venezuela

In 2020, the musical series *Carolay* continued by the open signal channel Venevisión and it was the only national premiere. However, 11 imported shows, headed by Colombian productions (*Un Bandido Honrado*, *Mujeres al Límite*, *Diómedes*, *Bolívar*, *Contigo Aprendí*, *La Nocturna*, *Tarde lo Conocí*, *El Hijo del Cacique*, *Tu Voz Estéreo*, *Vecinos* and *Chica Vampiro*), followed by three Mexican productions (*Así en el Barrio Como en el Cielo*, *Siempre Tuya Acapulco* and *Lo Imperdonable*) and one from Argentina (*Heidy Bienvenida al Show*) were showed, mostly by Televen. Shows from Rumania (*Apuéstale a la Vida*) and from Greece (*Brusko: Una Mujer desconocida*) were broadcast by Televen and TVes, respectively. The Italian mini-series *Cumbres Borrascosas*, the Turkish series *Ertugrul* and the Japanese *Las Horas de mi Vida* were also broadcast by the open signal TV.

National reruns, especially *telenovelas* and series, led the national TV offer due to the Covid-19 pandemic. Venezuelan *telenovelas* offered the audiences the opportunity to recall actors and times from de past; this was the case of *Guayoyo Express*, a *telenovela* that reflects the lives of Venezuelan families in the village and in the city, and, as a comedy, has been broadcast year after year by Televen.

Table 2. The Fiction Premiere: countries of origin

Country	Titles	%	Chapters/ Episodes	%	Hours	%
NATIONAL (total)	1	8,3	4	0,2	3:00:00	0,4
OBITEL COUNTRIES (total)	11	91,7	2261	99,8	690:50:00	99,6
Argentina	1	8,3	46	2	69:00:00	10,0
Brazil	0	0	0	0	0:00:00	0
Chile	0	0	0	0	0:00:00	0
Colombia	7	58,4	597	26,3	448:45:00	64,7
Ecuador	0	0	0	0	0:00:00	0
Spain	0	0	0	0	0:00:00	0
EE. UU. (Hispanic production)	0	0	0	0	1:00:00	0
Mexico	3	25	196	8,6	147:40:00	21,3
Peru	0	0	0	0	0:00:00	0
Portugal	0	0	0	0	0:00:00	0
Uruguay	0	0	0	0	0:00:00	0
Venezuela	1	8,3	4	0,2	3:00:00	0,4
CO-PRODUCTIONS (total)	0	0	0	0	0:00:00	0
Venezuelan Co-productions	0	0	0	0	0:00:00	0
Obitel countries Co-productions	0	0	0	0	0:00:00	0
GRAND TOTAL	12	100,0	2265	100	693:50:00	100,0

Source: Obitel Venezuela

The main TV fiction providers are: Colombia with 597 chapters broadcast; Mexico with 196 chapters; and, finally, Argentine with 46. When the total number of chapters (2261) broadcast by Obitel member countries are compared with those transmitted by Venezuela (4), it is evident that Venezuelan national production has progressively declined for several years, affecting the entertainment sector.

Table 3. Venezuelan and Ibero-American fiction formats

Formats	National						Ibero-Americans					
	Titles	%	C/E	%	H	%	Titles	%	C/E	%	H	%
<i>Telenovelas</i>	0	0,0	0	0,0	0:00:00	0,0	6	54,5	392	46,7	295:20:00	44,4
Series	1	0,0	4	0,0	3:00:00	100,0	5	45,5	447	53,3	370:15:00	55,6
Miniseries	0	0,0	0	0,0	0:00:00	0,0	0	0,0	0	0,0	0:00:00	0,0
Telefilm	0	0,0	0	0,0	0:00:00	0,0	0	0,0	0	0,0	0:00:00	0,0
One-off episode	0	0,0	0	0,0	0:00:00	0,0	0	0,0	0	0,0	0:00:00	0,0
Docudrame	0	0,0	0	0,0	0:00:00	0,0	0	0,0	0	0,0	0:00:00	0,0
Others (soap opera, etc.)	0	0,0	0	0,0	0:00:00	0,0	0	0,0	0	0,0	0:00:00	0,0
Total	1	100,0	4	100,0	3:00:00	100,0	11	100,0	839	0,0	665:35:00	100,0

Fuente: *Obitel Venezuela*

Series was the format with the most hours of national and Ibero-American fiction transmission, totalizing 447 episodes from Ibero-American countries and four from Venezuela. However, the *telenovelas* remained, as it did in 2019, the most widespread format because it obtained the greater number of titles broadcast and, in consequences, was the favorite in Venezuelan TV.

Table 4. The ten top titles for open TV

	Titles	Channel	Origin country of the original idea or script	Format/genre	No. of cap/ep (in 2020)	Time slot	Rating	Share
1	<i>Juana La Virgen</i>	Televen	Venezuela	<i>Telenovela</i>	123	Afternoon	No data	No data
2	<i>Guerra de Mujeres</i>	Venevisión	Venezuela	<i>Telenovela</i>	141	Afternoon	No data	No data
3	<i>A todo Corazón</i>	Venevisión	Venezuela	Series	72	Afternoon	No data	No data
4	<i>Mis Tres Hermanas</i>	Televen	Venezuela	<i>Telenovela</i>	176	Afternoon	No data	No data
5	<i>La Mujer Perfecta</i>	Venevisión	Venezuela	<i>Telenovela</i>	23	Prime time	No data	No data
6	<i>Bolívar</i>	Televen	Colombia	<i>Telenovela</i>	79	Prime time	No data	No data
7	<i>Mujercitas</i>	Venevisión	Venezuela	<i>Telenovela</i>	93	Afternoon	No data	No data
8	<i>Chica Vampiro</i>	Colombia	Colombia	Series	110	Afternoon	No data	No data
9	<i>Qué Clase de Amor!</i>	Venevisión	Venezuela	Series	18	Afternoon	No data	No data
10	<i>Aunque Mal Paguen</i>	Venevisión	Venezuela	<i>Telenovela</i>	172	Prime time	No data	No data
Total of productions: 10				Foreign scripts: 2				
100%				0%				

Since, as it was previously mentioned, the only audience measurement company in Venezuela ended its operation, it was not possible to obtain information about: rating, share, gender, socioeconomic level and age ranges.

Nevertheless, the research team created an online questionnaire to evaluate the top ten titles on open TV. It had five questions: age, gender, list of premieres broadcast by open TV, list of national reruns and list of international reruns. The instrument was made on Typeform platform and sent, using the messaging service WhatsApp,

to different groups throughout the country. The first target group consisted of 50 people from popular parishes of Caracas, El Valle, and Sucre, who in turn resent the questionnaire to other people interested.

A total of 43 people responded the questionnaire, 26 of whom were female, 16 males and one decided not to answer. The age range was between 28 and 70. Regarding the titles, *Juana la Virgen* was chosen as the first on the ten tops (48,5%), while *Aunque Mal Paguen* was considered the last of this group (32,3%). Even though, surveyed people claimed to have seen the *telenovelas*, the assessment was not positive; in some cases, they considered them averages or poor. The top ten production according with this informal study were: *Juana La Virgen*, *Guerra de Mujeres*, *A todo Corazón*, *Mis Tres Hermanas*, *La Mujer Perfecta*, *Bolívar*, *Mujercitas*, *Chica Vampiro*, *¡Qué Clase de Amor!* and, *Aunque Mal Paguen*.

Unlike previous years, just one of the 11 international premieres was part of the top ten (*Bolívar*), since an average of 60% and 80% of people said they have not seen the premieres on the list.

3. Monitoring VOD 2020

During the Covid-19 pandemic, much of the entertainment sector (cinemas, theaters, concerts, others) was paralyzed, causing an audience migration to device screens used at home. Despite the daily economic, social and political problems, Venezuelans took advantages of the circumstances to step, more cheerfully, into the VOD platforms world, especially focusing on virtuality and streaming services.

3.1 VOD platform market

Both, the pandemic and the end of DirecTV operation opened new options for TV entertainment. Several companies offering different VOD platform packages emerged in this context, being Netflix and Amazon Prime Video the most popular among Venezuelans. This finding is coherent with the international trend, as according to an Axios study carried out in the second quarter of 2020, Netflix leads the rank with 192.9 million of subscribers, closely followed by Amazon with 150 million (Quinteros, 2020). Although it is important to note that in Venezuela, unlike other countries, the consumption of VOD platforms shows some difficulties, such as: the slowest internet connection and insufficient financial resources to spend in entertainment².

The end of operation of DirecTV prevented subscribers to enjoy VOD services provided by DirecTV Play and OnDirecTV, such as HBO Go, TNT Go o Paramount Channel Play. Users also could access those platforms directly through their *apps* by using DirecTV code access, but they also lost that opportunity. Some national channels looked for alternatives, so their audiences could enjoy their contents. IVC Networks opened a YouTube channel and a Facebook account through which it broadcast regular programs (El Informador, 2020). The news channel Telesur also opened a WhatsApp account to stay in touch with its audience.

Regarding the VOD platforms made in Venezuela, Vivo Plays remains the most well-known; but even though its TV offer includes

2 “To pay Netflix is a luxury that all Venezuelans can afford. A basic plan, which is the cheapest of the three plans offered by this platform, cost three dollars per month. This sum corresponds to 1.140.000 *bolívars*, which is equivalent to three minimum wages. The situation is even more dramatic when the price of the premium plan, nine dollars, is compared; in this case it is equivalent to eight and half minimum wages. (Castillo, 2020, s.p).

life TV signals from Venezuelan channels (TV Venezuela and IVC Network) and from international channels (WB TV, E! Entertainment, Universal TV, History, A&E, Studio Universal, Sony Channel, SYFY, RCN, Antena 3, and others), its own production is still mainly informative. The serial fiction productions broadcast by this platform come mostly from Colombia and the United States. Nevertheless, it is complicated to enjoy those productions in Venezuela since Vivo Play signal was blocked by the Conatel in April 2017; the only way to have access to it is using a VPN service.

Another important DOV platform is RCTV. It belongs to IBC Enterprise and can be visualized through smartphones, tablets and PC. Its TV offer consist in old *telenovelas*, produced and broadcast by the TV channel RCTV when it was still on air, and some new documentary productions, such as *RCTV En Memoria*, a documentary made in 2020 that tells the story of this channel through its emblematic productions. The news can also be seen every day on this *app*, as well as some other contents.

3.2 VOD analysis in 2020: national and Ibero-American fiction premiere

Even though, Venezuela experienced an increase in the consumption of VDO services, national productions are rarely. Some open signal channels made available to their audiences, through VOD platforms, old fiction productions, in particular *telenovelas*. For instance, the VOD platform *Póngalo Novela Club*, belonging to IBC Enterprise (owner of renowned channel RCTV), that can be seen through services as VIX, mainly offered Latin America *telenovelas*, most of them old Venezuelan productions. The same was true for the already mentioned *app*, RCTV.

Table 6. Ibero-America and national fiction screened on VOD systems in 2020

NATIONAL TITLES PREMIERE	IBERO-AMERICAN TITLES PREMIERE	CO-PRODUCTIONS
<p>Amazon Prime Video – 1 1. <i>Almas en Pena</i> (serie)</p>	<p>Netflix – 34 1. <i>Onisciente</i> (series - Brazil) 2. <i>Casi Feliz</i> (series - Argentina) 3. <i>Valeria</i> (series - Spain) 4. <i>Chichipatos</i> (series - Colombia) 5. <i>Control Z</i> (series - Mexico) 6. <i>Perdida</i> (series - Spain) 7. <i>Reality Z</i> (series - Brazil) 8. <i>Historia de un Crimen: La Búsqueda</i> (series - Mexico) 9. <i>Boca a Boca</i> (series - Brazil) 10. <i>El Robo del Siglo</i> (miniseries - Colombia) 11. <i>La Venganza de Analía</i> (series - Colombia) 12. <i>La Valla</i> (series - Spain) 13. <i>100 Días para Enamorarnos</i> (series - USA) 14. <i>Bom Dia, Verónica</i> (series - Brazil) 15. <i>Alguien Tiene que Morir</i> (series - Mexico) 16. <i>Los Favoritos de Midas</i> (miniseries - Spain) 17. <i>El Desorden que Dejas</i> (series - Spain) 18. <i>Oscuro Deseo</i> (series - Mexico) 19. <i>Desenfrenadas</i> (series - Mexico) 20. <i>Puerta 7</i> (miniseries - Argentina) 21. <i>La Fiscal de Hierro</i> (series - Mexico) 22. <i>Amar y Vivir</i> (series – Colombia)</p>	<p>Netflix – 1 1. <i>Selena: La Serie</i> (series -Mexico and USA)</p>

NATIONAL TITLES PREMIERE	IBERO-AMERICAN TITLES PREMIERE	CO-PRODUCTIONS
	<p>Amazon Prime Video – N° Ibero-American titles</p> <p>23. <i>Caronte</i> (series - Spain) 24. <i>De Brutus, Nada</i> (series - Mexico) 25. <i>El Cid</i> (series - Spain) 26. <i>El Presidente</i> (miniseries - Chile) 27. <i>El Candidato</i> (series - Mexico) 28. <i>Súbete a Mi Moto</i> (series - Mexico) 29. <i>Cómo Sobrevivir Soltero</i> (series - Mexico) 30. <i>La Jauría</i> (series - Chile) 31. <i>La Bandida</i> (series - Mexico)</p> <p>HBO Go – N° Ibero-American titles</p> <p>32. <i>Hard</i> (series - Brazil) 33. <i>Dime Quién Soy</i> (miniseries - Spain) 34. <i>Todxs Nos</i> (series - Brazil)</p>	
Total: 1	Total: 34	Total: 1
GRAND TOTAL: 36		

Source: *Obitel Venezuela*

Almas en Pena, from the producer of audiovisual content RCTV International, was the only Venezuelan production screened in 2020 through different VOD platforms. It is about 12 legends of supernatural beings that serve as a starting to call the attention of ten influencers, who are desperately trying to increase their followers. Each story tells a frightening experience that happens to ordinary people nowadays. However, the experience transcended and claimed the lives of the influencers, originating one of the oddest police case.

Almas en Pena can be enjoyed in Latin America (Argentina, Belize, Bolivia, Chile, Colombia, Costa Rica, Dominican Republic, Ecuador, El Salvador, Guatemala, Honduras, Nicaragua, Panamá, Paraguay, Perú, Uruguay and Venezuela) through Amazon Prime Video and in Mexico through Tubi TV, a streaming service acquired by Fox Corporation.

Another important fact that needed to be mentioned is the participation of the Venezuelan Diego Velasco as director of the episode *A Celebration of the Human Life Cycle* from the series *Social Distance* (2020), produced by Netflix. Even though this is not a national show, it allows to appreciate how the Venezuelan talent continues to work, leaving a stamp on international productions.

Table 7. Fiction premiere on VOD in 2020 by country of origin

Country	Titles	%
NATIONAL (total)	1	2,8
OBITEL COUNTRIES (total)	34	94,4
Argentina	2	5,5
Brazil	6	16,7
Chile	2	5,5
Colombia	4	11,1
SPAIN	8	22,2
UNITED STATES (Hispanic productions)	1	2,8
Mexico	11	30,6
Peru	0	
Portugal	0	
Uruguay	0	
Venezuela *	1	2,8
CO-PRODUCTIONS (total)	1	2,8
Venezuelan Co-productions **	0	
OBITEL countries Co-productions	1	2,8
GRAND TOTAL	36	100

Source: *Obitel Venezuela*

Contrary to the low participation of Venezuela in VOD platforms, Latin America, in general, and especially Obitel member countries launched in 2020 an important amount of fiction series on renowned platforms, like Netflix, Amazon Prime Video and HBO Go. As can be seen in table 7, Mexico is the Ibero-American country with the greater number of productions showed on VOD during 2020, 11 productions (30,6%), followed by Spain with eight productions (22, 2%).

Among Ibero-American productions launched in 2020 on VOD platforms, the most widely consumed series in Venezuela were *100 Días para Enamorarnos* (United States) and *Amar y Vivir* (Colombia), both showed in Netflix (FlixPatrol, 2020). It is important to highlight that series released before 2020 were also seen by Venezuelans, for instance: *Pablo Escobar* (Colombia, 2012), *Yo Soy Betty, la Fea* (Colombia, 1999) and *Bolívar, Una Lucha Admirable* (Colombia, 2019).

4. Fiction and audience's participation in digital environment

In 2020, Venezuelan audiences' participation in digital environment increased compared to previous years. All this happened in the context of a higher connectivity, mainly motivated by the Covid 19 pandemic and the aggressive campaign “#QuédateEnCasa”, driven by TV channels, both in open signal and social networks. Even though the collapse of the electric service (especially necessary for internet connections) deepened during the year, the demand of fixed and mobile broadband services augmented as well as the speed connection. This plus the fact that DirecTV pulled out the country

motivated national channels to reinvent strategies to reach audiences through digital platforms.

That is how Televen started to broadcast its live signal 24 hours a day through its web site³, in spite of the transmission problems due to Venezuela poor connection. It is important to mention that comments from users were not allowed in this platform. Other relevant attempts to have a presence on social media network during the pandemic were performed by Vale TV and the state channel Ávila TV. The former promoted and massified its religious and educative TV contents on its Instagram account, @valetvcanal5; and the latter standardized the posts on its Instagram account, @avilatvsuena, by adding exclusive designs to the front page or default view of its publications, which consist of fragments of documentaries and programs broadcast on TV. For both channels, the Instagram activities during the 2019 were essentially limited to the publication of informative images or ephemeris. These efforts to have a greater presence on social networks were not accompanied with the chance of giving the audiences spaces to participate; users' comments were absent.

However, it is important to highlight the interaction registered between Televen official Instagram account, @televentv, and its followers. The use of flyers and promotional videos to invite the audience to watch the TV production encouraged notoriously the users' participation. The most common comments were about technical improvements of the TV signal in some part of Venezuela, as well as critics and supports to the channel for its TV offer. A Televen viewer commented on a post about the program *Mi Corazón Es Tuyo*, on June 25th: "Good morning, the signal cannot be seen here in Valencia (with crying emo-

3 <http://www.televen.com/>

jis)”⁴. On that same publication, another viewer commented: “Just old and rerun TV programs”. The answer to this, from the official TV account, was: “We would love to read your comments (TV emoji). Happy night! (Hug emoji)”. This pattern was replicated on Instagram publications about fiction titles and on Twitter as well. Venevisión official account on Instagram, @Venevisión, just made two publications about fiction titles during the year. The state channel Tves proceeded in the same manner on all its social networks accounts.

Finally, it is also worth noting the audience participation on web sites and social networks accounts to access, on informal basis and with different levels of reliability, Netflix, VOD service that became very popular in 2020 as a source of fiction titles. In Venezuela there are many social networks accounts dedicated to sell different screens from a same Netflix account and, in some cases, they even sell the same screen to different users. This is detected by the platform and, in consequences, it prevents the access. These accounts and screens have prices ranging between three and eight dollars, depending on the number of screens, and are paid in *bolívars*, according to the rate of the day.

5. Highlights of the year

The negative impact of Venezuela’s economic on audiovisual content production, especially on fiction series, was exacerbated during 2020 by the Covid-19 pandemic. National TV channels intensified the broadcast of reruns, especially Venezuelan ones, because they represent a lower cost option.

The Venezuelan government, through its communication and cultural institutions, started the pre-production process of the

4 <https://www.instagram.com/p/CB3Z14Gjw6b/?igshid=m9me9jqp33y>

miniseries, made up of nine episodes, *Carabobo, Camino de Libertad*, that seeks to commemorate the battle of Carabobo. This is a production from Villa del Cine, sponsored by the office of the Presidency. The internationalization of Venezuelan fiction is probably one of the best success of 2020: the horror series *Almas en Pena* and teen series *Carolay*.

At the beginning of the pandemic, Nicolás Maduro Moros, in one of his public speech, recommended to watch the series *Bolívar* (2019) in Netflix, ignoring the fact that 50% of Venezuelan population does not have a quality internet service. Years before, regarding this series he had claimed: “TV channels belonging to the Colombian oligarchy launched a series about *Bolívar*...how many lies, defamations and trash will be showed in that miniseries”⁵.

Finally, albeit *Obitel* interest is generally focused on the production of contents that circulates through commercial cinema circuits, in Venezuelan context it is essential to take into consideration the serial fiction distributed through alternative circuits relevant to the audiences. Indeed, we found some series that started as daily episodes from youtubers based on humor, parody, caricaturing, camera jokes and dancing to promote their products and social networks. These episodes work as starting points to attract public attention. Also, plots about crimes in slums are shown, and in some cases, they are made by communitarian productions.

An example of the cases mentioned above is Flavio Andrés Lloreda Brojanigo, a *youtuber* known as Yolo, who owns a YouTube

5 On Video: Maduro regrets: he apologized for his previous critics to Bolívar <https://www.semana.com/cultura/articulo/nicolas-maduro-se-disculpo-por-sus-criticas-a-la-serie-bolivar-una-lucha-admirabl/626114/>

channel with 10,4 M subscribers. One of his first project was called *Yolo Aventuras*. The first episode, called *Llegamos a la Casa de Momo* and broadcast in 2019, has amassed 11.753.291 views on YouTube. This channel promotes the Instagram and Tik Tok accounts of the protagonists, as well as two YouTube channels and two video game channels (*Cracks*: https://youtu.be/R_Z6hT_pvoY; *Titanes*: <https://youtu.be/Pc7d-sAsiDc>). Unfortunately, the electricity crisis affecting Venezuela forced the team to migrate to Colombia. There, they released a four episodes series called *Magicland* on November 19, 2020. The story centers on the environmental care. The first episode was free of charges, but the following could just be enjoyed by paying between one and four dollars.

Other production that must be mentioned for the number of episodes made and exhibited through YouTube is the teen series *En el Salón*, produced by Show Men Production Records - AKTV Tu Canal. It is a very low-quality product that reproduces stereotypes and topics from other teen series. The first season was shown in 2020 and had ten episodes that lasted between 50 and 60 minutes.

During November 2020, Nene Films Producer Company from Cumaná, state of Sucre, showed the third-season finale episode of the series *A Pesar de Todo*, consisting in thirteen episodes with an average duration 30 and 40 minutes.

From Caracas, Jackson Gutiérrez gave, using the guerrilla filmmaking technique, a workshop which resulted in a miniseries called *Azotes de Barrio*. The first episode was broadcast in July 2, 2020 and episode 35 on April 24, 2021, demonstrating a big production capacity that some big networks have not reached yet.

6. Theme of the Year

This chapter will be approached considering different edges: the content production (fiction, serial fiction and no-fiction), the bi-securitary measures proposed by the State bodies to control the filming and the exhibition strategies. Regarding the content production, those related to crime stories remained on the top. In November the police series *Dealers* was released on YouTube, consisting in a first season two episodes, and a third one at the beginning of 2021. It is a series with a high level of production: technical resources, film editing, special effects, music and the use of special equipment (for instance, drones, helicopters and guns) that creates an aesthetic proposal consistent with the action thriller genre. Unfortunately, it lacks a solid script, a rigorous actor' direction and an audiovisual grammar proposal that allows the spectator to connect with the contents, which could easily have been used as a space for denouncing. However, the filmmakers believe they have made a reflection and have given a positive message that differentiates it from advocacy of crime.

*Amor sin Tapabocas*⁶ is the second production shot during the Covid-19 pandemic, produced by Nené Films Company and released on September 1, 2020. It is an 11 episodes miniseries exclusively for Instagram TV that uses the humor for social criticism. The third show is *Readaptado*⁷, a 15 episodes web series produced by Wappo Contenido Creativo and launched on September 11, 2020. This work was done using video calling chats about the experiences from the lockdown caused by the Covid-19 pandemic.

6 Comedia en tiempos de Coronavirus - Amor sin tapa bocas Trailer Oficial https://www.youtube.com/watch?v=Y_16TomxjYE

7 READAPTADOS: web show <https://www.youtube.com/watch?v=dtNzPDHasbA>

The only *telenovela* shot in 2020, *Intrigas Tras Cámaras*, directed by Henry Galué and Edgar Liendo for Quimera Producciones, had to apply biosecurity measures to each actor and member of the team on the arrival to the set and during the shooting (disinfection areas and use of face masks, gloves and face shields). Kisses and hugs were suppressed in order to avoid contagion.

In the education environment, some experiences were undertaken during 2020. The Film and TV School, Ltd (Escuela de Cine y TV C.A.) produced the short film *Covid Jane Moda Viral*, while the National Film School organized IV Short Film Annual Exhibition:

These are the results of exercises and we especially value their cinematographic tale since they have been made under unique circumstances. They are testimonies, self-discovery processes -at least for the authors-. They are the outcome of the pandemic restrictions, of new rhythms and customs, that have forced us to see ourselves differently during this Covid-19 time (Boada, 2021, p. 1).

Regarding the Audiovisual University of Venezuela, the short film *Operazion 0.1*, by Andrés Rosales, stand out for the grammar used, the art direction, the effects, the makeup, the production resources and the sound track⁸. Additionally, there are documentaries made by Venezuelans living abroad that are moving in their sensitivity and simplicity. The first of them is *Los Días que Pasan*, by Antonio Savinelli that “tells the lockdown story through the eyes of Leo, a four years boy that everyday does the same thing along with his little sister Olivia”⁹. The second piece is *Solos* by Gilberto Polo Pacheco. It is a

8 <https://encuadro.uav.online/cortometrajes/operazion-0-1/>

9 <https://certamendecortossoria.org/edicion-2020/seccion-oficial-2020/329-los-dias-que-pasan.html>

story made with the opinions from 29 individuals about the realities of the lock down:

This virus came to show how vulnerable we are when we face the absence. A loneliness imposed that causes desolation in the hearts of those waiting for a return to the past, and creates uncertainty of tomorrow (Fibaco, 2020, p.1).

In other formative spaces as The Film Factory, which is a program promoted by the National Association Gran Cinema Circuit that has as fundamental objective the film creation by young filmmakers about the defense of human rights, made, in June 2020, the short film *¿Filmar en cuarentena?*, directed by Omar Mesones. The purpose is to offer “in six minutes some simple and required techniques that make it possible to meet the target consisting in completing the films ‘production’”¹⁰. Concerning the compliance of rules, a “Protocol for shooting in Venezuela during the Health Emergency caused by Covid-19” was generated and circulated in June. It has measures to be complied during preproduction, shooting and postproduction processes. The protocol will be activated during flexible weeks, when the government allows economic activities with some restrictions.

Considering the ban on public spaces during the Covid-19 epidemic, two types of initiatives emerged in Caracas: The Ceiling Cinemas and the drive-in cinemas. The formers were promoted and managed by the organization *Zonas de Descarga*¹¹: the ceiling of some houses from Petare, one of the biggest slums in Caracas, were used to make film screenings to be enjoyed by local neighbors from their homes. Later, other activities such as storybook reading, concerts, theater and

10 <https://www.youtube.com/watch?v=xsotSJAglsw>

11 Earlier experience related to *Cine móvil* or *Cine balcón* from the Gran Cinema Circuit and to the program *Cine bajo las estrellas* of the National Cinematheque Foundation.

dance performances joined the initiative (León, 2020, p.1). The latter, the drive-in cinemas, did not have success due to the high entrance fee and the low quality of service delivered.

National initiatives consisting in streaming exhibitions were consolidated during the pandemic; unfortunately, they had to move to other countries owing to technological restrictions. Low internet speed and recurrent power interruptions, as well as economic insecurity prevent *Cine Mestizo* (a platform exclusively dedicated to show Venezuelan films) to be managed from Venezuela.¹²

Other disciplines seized the opportunity to build what could be called new discursive forms, and in this process display technologies for electronic communication device and, in particular, videoconference technology played an important role. The first example is the Literary Action Group for an Organic Theater (Galto in its Spanish acronym) consisting in a permanent workshop of dramaturgy and virtual staging, and that form part of the Actors' Gym. The second one, *Residencias Paisano* (Residences Civilian), emerges as an initiative for collective creation dramaturgy aimed at working primarily on citizen coexistence issues. This initiative was supported by The Comarca Theatre, the Institute for Communications Research (ININCO) from the Central University of Venezuela (UCV) and the Global Observatory of Communication and Democracy. Both experiences were directed by Lupe Gehrenbeck.

Residencias Paisano resulted from the gathering of ten directors to create a theatrical text that was later live-streamed by chapter for several weekends. Directors, writers and actors located in different parts of the world participated in this experience, evidencing the importance of Venezuelan diaspora. Based on the idea of approaching and promoting the work of Venezuelan artists living in diaspora, the British

12 <https://cinemestizo.com/>

Council supported the creation of different plays for a festival called “Imaginary House, Digital Encounter”, promoted by *La Caja de Fósforos*, a theatre room and a creative collective. The festival consisted in reflections on the space called “house” and its connotations. It also produced six short films from the project *Ethnography of the Lockdown* that consisted in exploring, by young directors (Juan Pablo Pérez, María Ruíz, Ray González Duque, María Molina, Aitor Aguirre and Hensahis Zambrano), docufiction stories about the isolation brought on by the Covid-19 pandemic; as well as two web series streamed by *La Caja de Fósforos* online platform: *Lockdown* (15 episodes) and *Bicho Raro* (five episodes).

Unfortunately, these valuable efforts left aside a huge amount of people without access to internet due to different reasons: the poor-quality service, the selective blockade of signals and the arbitrarily suspension of the service by CANTV, one of Venezuelan state operator. Finally, it is worth to mention that one of the official TV channels, VTV, suffered a Covid-19 collective contagious event for not complying properly the required biosecurity measures.

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Part III

Top ten TV fiction in Obitel countries

ARGENTINA

1. *JESÚS*

Production: Casablanca, Record TV (Brazil)

Direction: Edgard Miranda

Script: Paula Richard

Cast: Dudu Azevedo, Mayana Moura, Day Mesquita, Cláudia Mauro, Fernando Pavão, Vanessa Gerbelli, Marcos Winter, Guilherme Winter

Exhibition dates (In 2020):

05/04 to 10/09

2. *SEPARADAS*

Production: Pol-Ka (Argentina)

Direction: Martín Saban, Sebastián Pivotto

Script: Marta Betoldi, Esteban Del Campo, Josefina Licitra

Cast: Celeste Cid, Marcela Kloosterboer, Agustina Cherri, Mónica Antonópulos, Julieta Zylberberg, Gimena Accardi, Julieta Nair Calvo

Exhibition dates (In 2020):

01/20 to 03/19

3. *ACOSO*

Production: Globo, O2 Filmes (Brazil)

Direction: Amora Mautner

Script: Maria Camargo

Cast: Antônio Calloni, Adriana Esteves, Paolla Oliveira, Mariana Lima

Jéssica Ellen, Hermila Guedes, Elisa Volpato, Vera Fischer, Juliana Carneiro da Cunha, Bianca Müller

Exhibition dates (In 2020):

01/01 to 01/08

4. *LOS INTERNACIONALES*

Production: Viacom International Studios, The Mediapro Studio, Telecom

Olympusat, INCAA (Argentina, Colombia)

Direction: Martín Hodara, Pablo Vázquez, Pablo Ambrosini

Script: Martín Méndez, Bruno Luciani, Luciana Porchietto

Cast: Cecilia Roth, Juan Pablo Shuk, Rafael Ferro, Camilo Amores, Sebastián Osorio, Ramistelly Herrera, Christian Vega, Laura Perico, Carlos Santamaría

Exhibition dates (In 2020):

05/20 to 07/08

5. CLUB 57

Production: Rainbow SpA (Italy), Nickelodeon (USA hispanic).

Direction: Otto Rodríguez

Script: Catharina Ledebøer, Diego Vago

Cast: Evaluna Montaner, Isabella Castillo, Andrés Mercado, Martín Barba, Sebastián Silva

Exhibition dates (In 2020):
not available

6. LA PROMESA

Production: CMO, Caracol (Colombia)

Direction: Klych López, Liliana Bocanegra

Script: Irma Correa, Margarita Londoño, Paul Rodríguez, Catalina Palomino.

Cast: Julieth Restrepo, Nicole Santamaría, Luis Roberto Guzmán, Aislinn Derbez, Zharick León, Christian Tappan, Juan Sebastián Calero, Jesús Ochoa, Manuel Navarro, Brian Moreno

Exhibition dates (In 2020):
02/03 to 05/06

7. LA PERSUACIÓN

Production: El Buey solo (Argentina)

Direction: Guillermo Berger

Script: Erika Halvorsen

Cast: Arturo Bonín, Edda Bustamante, Susana Cart, Gabo Correa, Alan Daicz, Cristina Fridman, Lucía Maciel, Dalma Maradona, Sergio Martínez, Fabián Minelli

Exhibition dates (In 2020):
07/20 to 08/05

8. FUGITIVOS

Production: CMO, Caracol (Colombia)

Direction: Klych López, Liliana Bocanegra, Camilo Vega.

Script: Claudia F. Sánchez, Said Chamie.

Cast: Emmanuel Esparza, Taliana Vargas, María José Martínez, Christian Tappan, Laura Osma, Marcela Agudelo, Alex Letón, Mario Jurado, José Narváez, Endry Cardeño.

Exhibition dates (In 2020):
not available

9. *TERAPIA EN CUARENTENA* BRAZIL

Production: NOS, Contenidos

Públicos S.E (Argentina)

Direction: Juan Pablo Gugliotta

Script: Marcelo Camaño

Cast: Carola Reyna, Mercedes

Funes, Luciano Cáceres, Coco

Sily, Violeta Urtizberea

Exhibition dates (In 2020):

08/03 to 08/13

10. *SI SOLO SI*

Production: Manda de Dos

Producciones (Argentina)

Direction: Fernando Antonietta

Script: Sebastián Suárez, Diego

Morel

Cast: Roberto Carnaghi, Cande

Molfese, Paula Morales, Fabián

Vena

Yoyi Francella, Betiana Blum,

Sebastián Suárez

Exhibition dates (In 2020):

08/22 to 10/10

1. *FINA ESTAMPA - Special Edition*

Production: Globo

Direction: Wolf Maia

Script: Aginaldo Silva

Cast: Lilia Cabral, Christiane

Torloni, Dalton Vigh, Paulo

Rocha, Marcelo Serrado

Exhibition date (in 2020):

3/23 to 9/18

2. *AMOR DE MÃE*

Production: Globo

Direction: José Luiz Villamarim

Script: Manuela Dias

Cast: Regina Casé, Adriana

Esteves, Taís Araújo, Murilo

Benício, Vladimir Brichta,

Irândhir Santos, Chay Suede,

Jéssica Ellen

Exhibition date (in 2020):

3/15 to 4/9

3. *BOM SUCESSO*

Production: Globo

Direction: Luiz Henrique Rios,

Marcus Figueiredo

Script: Rosane Svartman, Paulo

Halm

Cast: Antônio Fagundes, Grazi Massafera, Rômulo Estrela, David Junior, Fabiula Nascimento, Armando Babaioff, Lúcio Mauro Filho, Ingrid Guimarães

Exhibition date (in 2020):

1/1 to 1/24

4. TOTALMENTE DEMAIS - Special Edition

Production: Globo

Direction: Luiz Henrique Rios

Script: Rosane Svartman, Paulo Halm

Cast: Marina Ruy Barbosa, Fábio Assunção, Juliana Paes, Felipe Simas, Humberto Martins

Exhibition date (in 2020):

3/30 to 10/9

5. SALVE-SE QUEM PUDER

Production: Globo

Direction: Fred Mayrink

Script: Daniel Ortiz

Cast: Deborah Secco, Juliana Paiva, Vitória Strada, Rafael Cardoso, Felipe Simas, Guilhermina Guinle, Flávia Alessandra

Exhibition date (in 2020):

1/27 to 3/28

6. A FORÇA DO QUERER - Special Edition

Production: Globo

Direction: Rogério Gomes, Pedro Vasconcelos

Script: Glória Perez

Cast: Juliana Paes, Isis Valverde, Paolla Oliveira, Marco Pigossi, Emilio Dantas, Carol Duarte, Maria Fernanda Cândido, Dan Stulbach

Exhibition date (in 2020):

1/1 to 3/12

7. O AUTO DA COMPADECIDA

Production: Globo

Direction: Guel Arraes

Script: Ariano Suassuna

Cast: Matheus Nachtergaele, Selton Mello, Denise Fraga, Diogo Vilela, Virginia Cavendish, Marco Nanini, Fernanda Montenegro, Maurício Gonçalves

Exhibition date (in 2020):

1/7 to 1/10

8. HAJA CORAÇÃO - Special Edition

Production: Globo

Direction: Fred Mayrink

Script: Daniel Ortiz

Cast: Mariana Ximenes, Malvino Salvador, João Baldasserini, Cleo Pires, Alexandre Borges, Malu Mader, Sabrina Petrágliã, Marcos Pitombo

Exhibition date (in 2020):

1/1 to 3/19

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 2020):

1/1 to 3/14

10. *ÊTA MUNDO BOM*

Production: Globo

Direction: Jorge Fernando

Script: Walcyr Carrasco

Cast: Sergio Guizé, Débora Nascimento, Flávia Alessandra, Eriberto Leão, Bianca Bin, Marco Nanini, Eliane Gardini, Elizabeth Savalla

Exhibition date (in 2020):

4/27 to 9/11

CHILE

1. *VERDADES OCULTAS*

Production: Chilefilms (Chile)

Direction: Felipe Arratia, Manuel Buch, Pablo Aedo, Víctor Huerta, Claudio López de Lérica

Script: Carlos Oporto, Sebastián Arrau, Fernando Delgado, Marianela Fuenzalida, Felipe Montero

Cast: Camila Hirane, Carmen Zabala, Matías Oviedo, Cristián Arriagada, Javiera Díaz de Valdés

Exhibition date (2020):

01/02 to 12/31 (season 5)

2. *YO SOY LORENZO*

Production: Mega (Chile)

Direction: Nicolás Alemparte, Bárbara Della Schiava

Script: Daniella Castagno, Alejandro Bruna, José Fonseca

Cast: Mario Horton, Vivianne Dietz, Jorge Arecheta, Sigrid Alegría, Francisco Reyes, Paula Luchsinger, Ricardo Vergara, Francisca Walker

Exhibition date (2020):

01/02 to 05/25

3. 100 DÍAS PARA ENAMORARSE

Production: Mega + DDRío Estudios (Chile)

Direction: Enrique Bravo, Ticoy Rodríguez

Script: Rodrigo Bastidas, Elena Muñoz, Milena Bastidas, Nicolás Mena

Cast: María Elena Swett, Diego Muñoz, Luz Valdivieso, Marcelo Alonso, Fernando Larrain, Celine Reymond, Sebastián Layseca

Exhibition date (2020):
01/02 to 12/30

4. HISTORIAS DE CUARENTENA

Production: Mega (Chile)

Direction: Nicolás Alemparte

Script: Rodrigo Cuevas

Cast: Francisco Melo, Paola Volpato, Gonzalo Valenzuela, María Gracia Omegna, Fernando Godoy, Héctor Noguera, Constanza Mackenna, Daniela Lhorente

Exhibition date (2020):
04/20 to 07/01

5. EL OTRO LADO DEL PARAÍSO

Production: Rede Globo (Brazil)

Direction: Mauro Mendonça Filho, André Felipe Binder

Script: Walcyr Carrasco

Cast: Bianca Bin, Sérgio Guizé, Glória Pires, Marieta Severo, Rafael Cardoso, Grazi Massafera, Thiago Fragoso

Exhibition date (2020):
01/02 to 01/31

6. NUEVO SOL

Production: Rede Globo (Brazil)

Direction: Dennis Carvalho, Maria de Médicis

Script: João Emanuel Carneiro

Cast: Giovanna Antonelli, Emilio Dantas, Deborah Secco, Adriana Esteves, Fabrício Boliveira, Fabiula Nascimento, Vladimir Brichta, Luisa Arraes, Cássia Kis, André Días, Armando Babaioff, Chay Suede, Luis Lobianco, Caco Ciocler, Maria Luísa Mendonça

Exhibition date (2020):
01/02 to 06/30

7. *LOS CARCAMALES*

Production: Kuarzo (Chile)
Direction: Nicol Ruiz, Alejandro Fernández
Script: Alejandro Fernández, Isabel Budinich, Diego Niño, Ariel Valenzuela
Cast: Gloria Münchmeyer, Patricio Contreras, Sergio Hernández, Alejandro Goic, Mariana Loyola, Daniel Alcaíno, Susana Hidalgo, Nicolás Poblete
Exhibition date (2020):
12/27 (inicio)

8. *GEMELAS IDÉNTICAS EN NADA*

Production: Parox (Chile)
Direction: Rodrigo Velásquez, Víctor Vidangossy
Script: Daniela Lillo, Arnaldo Madrid, María Luisa Hurtado, Guillermo García
Cast: Paloma Moreno, Cristián Arriagada, Francisco Gormaz, Eyal Meyer
Exhibition date (2020):
01/01 to 06/09

9. *LA JAURÍA*

Production: Fábula (Chile), Fremantle
Direction: Lucía Puenzo, Marialy Rivas, Sergio Castro, Nicolás Puenzo
Script: Paula del Fierro, Enrique Videla, Leonel D'Agostino, Lucía Puenzo Julio Rojas
Cast: Antonia Zegers, María Gracia Omegna, Daniela Vega, Alberto Guerra, Paula Luchsinger, Mariana di Girolamo, Lux Pascal
Exhibition date (2020):
11/02 to 11/17

10. *HÉROES INVISIBLES*

Production: Parox (Chile), Kaiho Republic, Yleisradio (Finlandia)
Direction: Mika Kurvinen
Alicia Scherson
Script: Tarja Kylmä
Manuela Infante
Cast: Pelle Heikkilä, Sophia Heikkilä, Ilkka Villi, Gastón Salgado, Néstor Cantillana, Cristián Carvajal, Paola Lattus,

Aksa Korttila, Juan Cano, Sönke Möhring, Mikael Persbrandt

Exhibition date (2020):

09/04 to 09/11

Script: Said Chamie, Claudia Sánchez

Cast: Carolina Gómez, Marlon Moreno, George Slebi, Geraldine Zivic

Exhibition date (in 2020):

04/15 al 07/03

COLOMBIA

1. *PASIÓN DE GAVILANES*

Production: RTI Televisión (Colombia)

Direction: Rodrigo Triana y Mauricio Cruz

Script: Iván Martínez

Cast: Mario Cimarro, Danna García, Paola Rey, Jorge Cao

Exhibition date (in 2020):

07/06 to 12/16

2. *LA VENGANZA DE ANALÍA*

Production: CMO Producciones (Colombia)

Direction: Camilo Vega y Luis Eduardo Sierra

3. *AMAR Y VIVIR*

Production: Fox Telecolombia (Colombia)

Direction: Liliana Bocanegra y Santiago Vargas

Script: Nubia Barreto

Cast: Carlos Torres, Ana María Estupiñán, Jairo Ordóñez, Mario Duarte

Exhibition date (in 2020):

01/07 to 04/14

4. *PEDRO EL ESCAMOSO*

Production: Caracol (Colombia)

Direction: Juan Carlos Villamizar

Script: Luis Felipe Salamanca, Dago García

Cast: Miguel Varoni, Sandra Reyes, Fernando Solórzano

Exhibition date (in 2020):

07/10 to 16/12

5. PA QUERERTE

Production: RCN (Colombia)

Direction: Catalina Hernández,
Israel Sánchez

Script: Jorge Elkim Ospina, Juan
Carlos Troncoso, Liliana Guzmán

Cast: Sebastián Martínez,
Juliette Pardau, Hanny Vizcaino,
Variel Sánchez

Exhibition date (in 2020):
01/07 to 03/20

6. ENFERMERAS

Production: RCN (Colombia)

Direction: Víctor Cantillo y Luis
Carlos Sierra

Script: Patricia Ramírez,
Carolina López, Catalina
Palomino

Cast: Diana Hoyos, Sebastián
Carvajal, Nina Caicedo, Julián
Trujillo, Viña Machado

Exhibition date (in 2020):
01/07 to 03/20

7. RAFAEL OROZCO, EL ÍDOLO

Production: Caracol (Colombia)

Direction: Andrés Marroquín,

Unai Amuchastegui

Script: Yanira Sánchez

Cast: Alejandro Palacio, Taliana
Vargas, Maritza Rodríguez,
Mario Espitia

Exhibition date (in 2020):
07/06 to 10/05

8. EL GENERAL NARANJO

Production: Fox Telecolombia
(Colombia)

Direction: Guillermo Mejía,
Mónica Botero

Script: Anita de Hoyos

Cast: Cristian Meier, Julián
Román, Diego Cadavid, Juliana
Galvis

Exhibition date (in 2020):
04/15 to 07/03

9. AMOR SINCERO

Production: RCN (Colombia)

Direction: Rodrigo Triana

Script: Fabiola Carrillo

Cast: Marcela Benjumea,
Marbelle Ramírez, Carlos
Manuel Vesga

Exhibition date (in 2020):
03/07 to 07/31

10. 3 MILAGROS

Production: Teleset (Colombia)

Direction: Rodrigo Lalinde,
Israel Sánchez

Script: Carlos Duplat, Luz
Mariela Santofimio, Paola
Andrea Cazares

Cast: Angélica Blandon, Johanna
Bahamon, Farina P. Paucar

Exhibition date (in 2020):
03/07 to 06/30

SPAIN

1. EL PUEBLO

Production: Contubernio (Spain)

Direction: Alberto Caballero,
Laura Caballero, Roberto Monge

Script: Alberto Caballero, Julián
Sastre

Nando Abad, Daniel Deorador,
Araceli Álvarez de Sotomayor

Cast: Ruth Díaz, Carlos Areces,
Raúl Fernández, María Hervás,
Santi Millán, Felipe García Vélez

Exhibition date (in 2020):
01/15 to 03/04

2. CUÉNTAME CÓMO PASÓ

Production: Grupo Ganga
Producciones, RTVE (Spain)

Direction: Agustín Crespi,
Antonio Cano

Script: Ignacio del Moral, Joaquín
Oristell, Jacobo Delgado, Sonia
Sánchez

Cast: Ana Duato, Imanol Arias,
María Galiana, Irene Visedo,
Pablo Rivero, Paloma Bloyd,
Carmen Climent, Carlos Hipólito

Exhibition date (in 2020):
01/02 to 03/19

3. LEJOS DE TI

Production: Mediaset Spain and
Cross Production (Spain and Italy)

Direction: Ivan Silvestrini

Script: Marco Tiberi, Marzio
Paoltroni, Mikel Barón, Bárbara
Alpuente

Cast: Megan Montaner,
Alessandro Tiberi, Pepón Nieto,
Rosario Pardo, Carlos Librado,
Celia de Molina

Exhibition date (in 2020):
04/08 to 05/20

4. *HIT*

Production: Grupo Ganga
Producciones, RTVE (Spain)
Direction: Joaquín Oristrell,
Álvaro Fernández Armero, Elena
Trapé
Script: Joaquín Oristrell, Pablo
Bartolomé, Jacobo Delgado,
Yolanda García Serrano
Cast: Daniel Grao, Melías Jesús,
Olaya Caldera, Carmen Arrufat,
Nourdin Batan, Oriol Cervera

Exhibition date (in 2020):

01/12 to 05/25

5. *DIARIOS DE LA CUARENTENA*

Production: Morena Films
(Spain)
Direction: Álvaro Fernández
Armero, David Marqués
Script: Álvaro Longoria, Anna
Saura, Berta Moreno, David
Marqués, Álvaro Fernández
Armero
Cast: Petra Martínez, Gorka
Otxoa, José Luis García Pérez,
Juan Margallo, Carlos Areces,
Cristina Alarcón, Carlos Bardem,
Carmen Arrufat

Exhibition date (in 2020):

04/07 to 05/19

6. *EL MINISTERIO DEL TIEMPO*

Production: Globomedia (Spain)
Direction: Marc Virgil, Jorge
Dorado, Abigail Schaaff
Script: José Ramón Fernández,
Paco López Barrio, Javier
Olivares, Pablo Olivares, Anaïs
Schaaff
Cast: Rodolfo Sancho, Hugo
Silva, Aura Garrido, Nacho
Fresneda, Macarena García,
Cayetana Guillén-Cuervo

Exhibition date (in 2020):

05/05 to 06/23

7. *AMAR ES PARA SIEMPRE*

Production: Diagonal TV (Spain)
Direction: Eduardo Casanova
Script: Ángel Agudo, Bárbara
Alpuente, Julia Altares, Tirso
Conde
Cast: Adriana Torrebejano, David
Janer, Manuel Baqueiro, Itziar
Miranda, José Antonio Sayagués,
José Manuel Seda, Lucía Jiménez

Exhibition date (in 2020):

01/02 to 12/30

8. *NÉBOA*

Production: Voz Audiovisual
(Spain)

Direction: Gonzalo López-
Gallego, Jorge Saavedra, Manu
Gómez

Script: Xosé Morais, Víctor
Sierra, Alberto Guntín

Cast: Emma Suárez, Isabel
Naveira, Antonio Durán, Nacho
Nugo, María Vázquez, Denis
Gómez, Alba Galocha

Exhibition date (in 2020):

01/15 to 03/04

9. *EL SECRETO*

DE PUENTE VIEJO

Production: Boomerang TV
(Spain)

Direction: José Picaporte, Aurora
Guerra, Alberto Pernet

Script: Aurora Guerra, Miquel
Peidró, Félix J. Velando, Benjamín
Zafra, Susana Prieto

Cast: Sara Ballesteros, Pau Durà,
Megan Montaner, Cuca Escribano,
Xosé Barato, Jonás Berami,
Alejandra Onieva

Exhibition date (in 2020):

01/01 to 05/20

10. *SERVIR Y PROTEGER*

Production: Plano a plano (Spain)

Direction: Nacho Guilló, Luis
Arribas, Laura Campos, Juan Gil

Script: Dionisio Pérez, Roberto
Goñi, Fran Carballal, Carmen
Fernández

Cast: Luisa Martín, Juanjo
Artero, Fernando Guillén-Cuervo,
Eduardo Velasco, Roberto
Álvarez, Paula Prendes, Cristina
Abad

Exhibition date (in 2020):

01/02 to 12/31

UNITED STATES

1. *TE DOY LA VIDA*

Production: Televisa (Mexico)

Director: Sergio Cataño, Nelhiño
Acosta

Screenplay: Edwin Valencia,
Lucero Suárez, Carmen
Sepúlveda, Luis Reynoso

Cast: José Ron, Eva Cedeño,
César Évora, Erika Buenfil, Nuria
Bages, Omar Fierro

Exhibition dates (in 2020):

04/13 to 08/03

2. *RUBÍ*

Production: Televisa, W Studios, Lemon Studios (Mexico)

Direction: Carlos Cock Marín, Pepe Castro, Pavel Vázquez

Screenplay: Leonardo Padrón, Vicente Albarracín, Carlos Eloy Castro, Karla de la Peña

Cast: Camila Sodi, José Ron, Rodrigo Guirao, Kimberly Dos Ramos, Ela Velden, Tania Lizardo

Exhibition dates (in 2020):
01/21 to 02/27

3. *COMO TU NO HAY DOS*

Production: Televisa, W Studios, Lemon Studios (Mexico)

Director: Luis Manso, Carlos Cock Marín

Screenplay: Julián Aguilar, Isabel de Sara, Mauricio Jalife

Cast: Adrián Uribe, Claudia Marín, Azela Robinson, Ferdinando Valencia, Aylin Mujica

Exhibition dates (in 2020):
04/27 to 08/25

4. *RINGO*

Production: Televisa (Mexico)

Director: Claudia Aguilar, Jorge Robles

Screenplay: Lucero Suárez, Carmen Sepúlveda, Luis Reynoso, Lorena Salazar, Maykel R. Ponjuan

Cast: José Ron, Mariana Torres, César Évora, Jorge Poza, Silvia Mariscal, Otto Sirgo

Exhibition dates (in 2020):
01/01 to 03/24

5. *EL DRAGÓN: EL REGRESO DE UN GUERRERO*

Production: Televisa, Univision, W Studios, Lemon Studios (Mexico)

Director: Alvaro Curiel de Icaza, Mauricio Cruz Fortunato, Carlos Cock Marín

Screenplay: Esther Feldman, Daniela Richer, Carlos Algara, Marisel Lloberas, Sandra Finkelstain

Cast: Sebastián Ruli, Renata Notni, Roberto Mateos, Irina, Baeva, Cassandra Sánchez

Navarro, Manuel Balbi

Exhibition dates (in 2020):

01/01 to 01/20

6. VENCER EL DESAMOR

Production: Televisa (Mexico)

Director: Benjamín Cann,
Fernando Nesme

Screenplay: Humberto Robles,
Alejandra Romero Meza,
Gerardo Pérez Zermeño, Gustavo
Bracco, Cecilia Obviedo, Claudia
Caro Cabello

Cast: Claudia Álvarez, David
Zepeda, Daniela Romo, Altair
Jarabo, Juan Diego Covarrubias,
Emmanuel Palomares

Exhibition dates (in 2020):

11/09 to 12/24

7. LA ROSA DE GUADALUPE

Production: Televisa (Mexico)

Director: José Ángel García,
Martha Luna, Ricardo de la
Parra, Eduardo Said, Lorena
Maza

Screenplay: Julián Aguilar,
Carlos Mercado, Mauricio
Aridjis, Adrián Quezada

Cast: Helena Rojo

(presentadora), diferentes
actores cada episodio

Exhibition dates (in 2020):

01/01 to 12/31

**8. MÉDICOS EN LÍNEA
DE LA VIDA**

Production: Televisa (Mexico)

Direction: Ana Lorena Pérez
Ríos, Santiago Barbosa

Screenplay: José Alberto
Castro, Vanesa Varela, Fernando
Garcilita, María Chávez González,
Ricardo Avilés

Cast: Libia Brito, Daniel Arenas,
Grettel Valdez, José Elías
Moreno, Carlos de la Mota,
Isabel Burr

Exhibition dates (in 2020):

07/14 to 11/02

9. IMPERIO DE MENTIRAS

Production: Televisa (Mexico)

Director: Walter Doehner, Juan
Pablo Blanco

Screenplay: Leonardo Bechini,
María Elena López

Cast: Angelique Boyer, Andrés
Palacios, Alejandro Camacho,

Leticia Calderón, Susana
González, Patricia Reyes
Espíndola

Exhibition dates (in 2020):

09/21 to 11/21

10. SIN MIEDO A LA VERDAD

Production: Televisa (Mexico)
Director: Carlos González, Silvia
Tort, Jacopo Fontana, Julio César
Estrada, Fez Noriega, Carlos
Jaramillo

Screenplay: Celia Kim, Carolina
Mata, Raúl Olivares, Itzel Lara

Cast: Alex Perea, Dacia González,
Tania Niebla, Ligia Uriarte,
Fermín Martínez, Israel Islas

Exhibition dates (in 2020):

03/09 to 04/24

MEXICO

1. TE DOY LA VIDA

Production: Televisa
Direction: Mónica Miguel
Script: Edwin Valencia
Cast: José Ron, Eva Cedeño,
César Évora, Érika Buenfil and
Nuria Bages

Exhibition date (2020):

03/13 to 07/27 Monday to Friday.

2. RUBÍ

Production: Televisa
Direction: Carlos Cock Marín
Script: Vicente Albarracín
Cast: Camila Sodi, José Ron,
Rodrigo Guirao, Kimberly Dos
Ramos
Ela Velden, and Tania Lizardo.

Exhibition date (2020):

01/21 to 02/28 Monday to Friday

**3. LA ROSA DE
GUADALUPE 13**

Production: Televisa
Direction: José Ángel García+/
Eduardo Said

Script: Carlos Mercado
Cast: Actos from CEA (Televisa acting school)

Exhibition date (2020):
01/01 to 12/31 Monday to Friday

4. *VENCER EL MIEDO*

Production: Televisa
Direction: Benjamín Cann
Script: Pedro Armando Rodríguez
Cast: Paulina Goto, Durán Bracho, Danilo Carrera, Emmanuel Palomares and Arcelia Ramírez.

Exhibition date (2020):
01/20 to 03/22

5. *COMO DICE EL DICHO*

Production: Televisa
Direction: Emmanuel Dúprez
Script: Vittoria Zarattini.
Cast: Sergio Corona, Brisa Carrillo, Benny Emmanuel and Fernanda Sasse

Exhibition date (2020):
01/21/01 to 06/12

6. *EL DRAGÓN: EL REGRESO DE UN GUERRERO*

Production: Televisa

Direction: Mauricio Cruz
Script: Carlos Cock Marín
Cast: Sebastián Rulli, Renata Notni
Roberto Mateos and Irina Baeva,

Exhibition date (2020):
09/30 to 12/30

7. *VENCER EL DESAMOR*

Production: Televisa
Direction: Benjamín Cann
Script: Humberto Robles
Cast: Claudia Álvarez, David Zepeda, Daniela Romo, Emmanuel Palomares, and Julia Urbini

Exhibition date (2020):
10/12 to 12/30

8. *QUERERLO TODO*

Production: Televisa
Direction: Claudia Elisa Aguilar
Script: Elizabeth Salazar
Cast: Michelle Renaud, Danilo Carrera, Víctor González, Sara Corrales and Scarlet Gruber

Exhibition date (2020):
09/20 to 12/30

**9. *ESTA HISTORIA
ME SUENA 2***

Production: Televisa

Direction: Janette Vega

Script: Elizabeth Cruz

Cast: María José, Jan Bautista,
and actors from CEA

Exhibition date (2020):
04/25 to 09/21

**10. *LA MEXICANA Y EL
GÜERO***

Production: Televisa

Direction: Aurelio Ávila

Script: Julián Aguilar

Cast: Itatí Cantoral, Juan Soler,
Luis Roberto Guzmán and Laura
Vignatti.

Exhibition date (2020):
08/17 to 12/30

PERU

1. *LOS VILCHEZ 2*

Production: ProTV
Producciones (Peru)

Direction: Lucho Barrios,
Miluska Rosas

Script: Mariana Silvia Yrigoyen,
Jesús Álvarez, David Carrillo,
Italo Cordano

Cast: Patricia Portocarrero,
Katerina D'onofrio, Mayra Goñi,
Ana Cecilia Natteri, Sergio Paris,
César Ritter, Gustavo Borjas

Exhibition date (in 2020):
01/06 to 04/09

2. *CHAPA TU COMBI*

Production: Del Barrio
Producciones (Peru)

Direction: Francisco Álvarez

Script: Eduardo Adrianzén,
Claudia Sacha, Jimena Ortíz
de Zevallos, Rogger Vergara,
Esteban Phillips, Danilo Vergara

Cast: Daniela Feijóo, Emanuel Soriano, Fiorella Díaz, Miguel Álvarez, Pold Gastello

Exhibition date (in 2020):
01/02 to 03/04

3. *DOS HERMANAS*

Production: Del Barrio

Producciones (Peru)

Direction: Francisco Álvarez, Aldo Salvini, Sandro Méndez

Script: Rita Solf, Abel Enríquez, Tito Céliz

Cast: Melissa Paredes, Mayela Illocla, Sebastián Monteghirfo, Yaco Eskenazi, Julián Legaspi

Exhibition date (in 2020):
03/04 to 03/19

4. *DE VUELTA AL BARRIO*

Production: América Televisión (Peru)

Direction: Jorge Tapia, Toño Vega

Script: Efraín Aguilar, Gigio Aranda

Cast: Mónica Sánchez, Paul Martin, Adolfo Chuiman, Ivonne

Frayssinet, Melania Urbina, Lucho Cáceres, Diego Bertie, Ana María Jordán, Tatiana Astengo

Exhibition date (in 2020):
09/28 to 12/30

5. *LA ROSA DE GUADALUPE PERÚ*

Production: América Televisión (Peru) y Televisa (Mexico)

Direction: César Arana Díaz, Dino García, Lucho Barrios

Script: Guillermo Aranda, Cinthia McKenzie, Gerardo Ruíz, José Luis Valera

Cast: Kathy Jara, Laly Goyzueta, Lilian Nieto, Emilram Cossío, Zoe Arévalo, Guillermo Blanco, Andrea Montenegro, Wendy Sulca, Nicolás Osorio

Exhibition date (in 2020):
03/20 to 04/17

6. *TE VOLVERÉ A ENCONTRAR*

Production: ProTV Producciones (Peru)

Direction: Luis Barrios

Script: Augusto Cabada,
Fotunada Barrios, Marcela
Cossíos

Cast: Denisse Dibós, Alondra
García-Miró, Sergio Paris,
Johanna San Miguel, Karina
Jordan

Exhibition date (in 2020):
04/20 to 10/02

7. *PRINCESAS*

Production: ProTV
Producciones (Peru)

Direction: Luis Barrios

Script: Augusto Cabada

Cast: Fiorella Pennano, Tatiana
Calmell, Priscila Espinoza, Flavia
Laos

Exhibition date (in 2020):
12/01 to 12/30

8. *MI VIDA SIN TI*

Production: Del Barrio
Producciones (Peru)

Direction: Ani Alva Helfer,
Michelle Alexander

Script: Eduardo Adrianzén

Cast: Pierina Carcelén, David
Villanueva, Andrés Vílchez,
Karime Scander,

Exhibition date (in 2020):
10/05 to 11/30

9. *LA OTRA ORILLA*

Production: Del Barrio
Producciones (Peru)

Direction:

Script: Rita Solf

Cast: Carolina Infante, Gonzalo
Molina, Alicia Mercado, Martín
Velásquez, Irene Eyzaguirre, Laly
Goyzueta

Exhibition date (in 2020):
08/03 to 09/25

10. *YO PERDÍ EL CORAZÓN*

Production: Tercer Ojo
Producciones (Peru)

Direction: Enrique Chimoy
Sierra

Script: Enrique Chimoy Sierra,
Alfredo Ortiz de Zevallos, Pamela
Limo, Marcela Hinostroza

Cast: Karely Maza, Adriana

Quevedo, Ingrid Altamirano,
Tatiana Espinoza, Fernando
Pasco, Ricardo Cabrera, Milagros
López Arias, Francisco Bazán

Exhibition date (in 2020):
12/07 to 12/28

PORTUGAL

1. NAZARÉ

Production: SP Televisão
(Portugal)
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):
10/09 a 12/30

2. TERRA BRAVA

Production: SP Televisão
(Portugal)
Direction: Jorge Queiroga
Script: Inês Gomes
Cast: Mariana Monteiro, João
Catarré, Maria João Luís, Renato
Godinho, João Jesus, Fernando
Luís

Exhibition date (in 2019):
10/28 a 12/30

3. GOLPE DE SORTE

Production: Coral Europa
(Portugal)
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):
05/27 a 11/10

4. VALOR DA VIDA

Production: Plural

Entertainment (Portugal)

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):
01/01 a 05/20

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 (in 2019):
21/12

6. ALMA E CORAÇÃO

Production: SP Televisão

(Portugal)

Direction: Hugo Xavier

Script: Pedro Lopes

Cast: Cláudia Vieira, José Fidalgo, Soraia Chaves, Ricardo Pereira, Madalena Almeida, Renato Godinho, Margarida Carpinteiro, Manuel Cavaco

Exhibition date (in 2019):
01/02 a 10/11

7. AMAR DEPOIS DE AMAR

Production: Plural

Entertainment (Portugal)

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):
06/17 a 09/13

8. *A TEIA*

Production: Plural Entertainment (Portugal)
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):
01/01 a 06/17

9. *NA CORDA BAMBA*

Production: Plural Entertainment (Portugal), TVI (Portugal)
Direction: Marcos Schechtman
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):
09/15 a 12/30

10. *PRISIONEIRA*

Production: Plural Entertainment (Portugal)
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):
05/21 a 12/30

URUGUAY

1. *QUÉ VIDA BUENA*

Production: Rede Globo (Brazil)
Direction: Jorge Fernando
Script: Walcyr Carrasco, María Elisa Barredo
Cast: Sérgio Guizé, Débora Nascimento, Flavia Alessandra, Eliane Giardini, Marco Nanini, Bianca Bin, Eriberto Leao,

Elizabeth Savalla

Exhibition date (in 2020):

03/23 to 10/05

2. *SUERTE DE VIVIR*

Production: Rede Globo (Brazil)

Direction: Luiz Henrique Rios

Script: Rosane Svartman, Paulo Halm

Cast: Grazi Massafera, Romulo Estrela, David Junior, Antonio Fagundes, Mayelin Sablon, Ania Perez, Armando Babaioff, Arletis Martinez

Exhibition date (in 2020):

09/14 to 12/ 31

3. *JESÚS*

Production: Récord TV (Brazil)

Direction: Edgard Miranda

Script: Paula Richard

Cast: Dudu Azevedo, Mayana Moura, Day Mesquita, Cláudia Mauro, Juliana Xavier, Fernando Pavao, Víctor Sparapane, Marcos Winter

Exhibition date (in 2020):

09/ 15 to 12/30

4. *NUEVO SOL*

Production: Rede Globo (Brazil)

Direction: Dennis Carvalho, María de Médicis

Script: Joao Emanuel Carneiro

Cast: Giovanna Antonelli, Emilio Dantas, Deborah Secco, Adriana Esteves, Fabricio Boliveira, Fabiula Nascimento, Vladimir Brichta, Luisa Arraes

Exhibition date (in 2020):

01/01 to 03/12

5. *CUNA DE LOBOS*

Production: Televisa (Mexico)

Direction: Eric Morales, Juan Pablo Blanco

Script: Lily Ann Martin, Claudio Lacelli

Cast: Paz Vega, Paulette Hernández, Gonzalo García Vivanco, Diego Amozurrutia, Nailea Norvind, Flavio Medina, Azela Robinson, Carlos Aragón

Exhibition date (in 2020):

08/01 to 09/22

6. CASA DE MUÑECOS

Production: Mega (Chile)
Direction: Patricio González,
Claudio López de Lérída
Script: Nona Fernández,
Marcelo Leonart, Ximena
Carrera, Larissa Contreras,
Patricio González
Cast: Gabriela Hernández,
Héctor Noguera, Sigrid Alegría,
Paulo Brunetti, Luz Valdivieso,
Celine Reymond, Daniela
Ramírez, Alejandra Goic

Exhibition date (in 2020):
01/01 to 04/02

7. SALVE AL REY

Production: Estudios Globo
(Brazil)
Direction: Fabricio Mamberti
Script: Daniel Adjafre
Cast: Mariana Ruy Barbosa,
Romulo Estrela, Bruna
Marquezine, Johnny Massaro,
Tatá Werneck, José Fidalgo,
Marco Nanini, Rosamaria
Murtinho

Exhibition date (in 2020):
01/01 to 01/24

8. PARTES DE MÍ

Production: TV Globo (Brazil)
Direction: Jayme Monjardim
Script: Lícia Manzo
Cast: Domingos Montagner,
Débora Bloch, Vanessa Gerbelli,
Jayme Matarazzo, Isabelle
Drummond, Maria Flor, Regina
Duarte, Thiago Rodrigues,

Exhibition date (in 2020):
05/18 to 07/24

9. HUÉRFANOS DE SU TIERRA

Production: Rede Globo (Brazil)
Direction: André Camara
Script: Duca Rachid, Thelma
Guedes
Cast: Julia Dalavia, Renato Góes,
Alice Wegmann, Carmo Dalla
Vecchia, Anajú Dorigon, Rodrigo
Simas, Emanuelle Araújo,
Danton Mello, Kaysar Dadour

Exhibition date (in 2020):
03/16 to 08/10

10. *SOLTERO CON HIJAS*

Production: Televisa (Mexico)

Direction: Bonnie Cartas,
Aurelio Ávila

Script: Hugo Moreno, Juan
Osorio, Helena Aguilar

Cast: Gabriel Soto, Vanessa
Guzmán, Mayrín Villanueva,
María Sorté, Pablo Montero,
Laura Flores, Carlos Mata, Irina
Baeva

Exhibition date (in 2020):
01/01 to 03/20

VENEZUELA

1. *JUANA LA VIRGEN*

Production: RCTV

Direction: Tony Rodríguez

Script: Perla Farías

Cast: Daniela Alvarado, Ricardo
Álamo, Roxana Díaz, Norkys
Batista, Eduardo Serrano

Exhibition date (in 2020):
2019 to 05/27

2. *GUERRA DE MUJERES*

Production: Venevisión

Direction: Román Chalbaud

Script: César Miguel Rondón y
Mónica Montañés

Cast: Gaby Espino, Mimí Lazo,
Jorge Reyes

Exhibition date (in 2020):
03/02 to 08/20

3. *A TODO CORAZÓN*

Production: Laura Visconti
Producciones

Direction: Luis Manzo

Script: Laura Visconti, César
Sierra, Ana Teresa Sosa

Cast: Adrián Delgado, Lourdes
Martínez, Gaby Espino, Daniela
Alvarado, Juan Alfonso Baptista

Exhibition date (in 2020):
04/21

4. *MIS TRES HERMANAS*

Production: RCTV

Direction: Tony Rodríguez

Script: Perla Farías

Cast: Scarlet Ortiz, Ricardo

Álamo, Roxana Díaz, Yul Bürkle

Exhibition date (in 2020):
04/28 to 01/21/2021

5. *LA MUJER PERFECTA*

Production: Venevisión
Direction: César Bolívar, José Luis Zuleta
Script: Leonardo Padrón
Cast: Mónica Spear, Ricardo Álamo, Ana Karina Manco, Jean Carlo Simancas

Exhibition date (in 2020):
06/22 to 01/19/2021

6. *BOLÍVAR*

Production: Caracol Televisión
Direction: Luis Alberto Restrepo, Andrés Beltrán
Script: Juana Uribe, María Clara Torres, Ricardo Aponte, Leonor Sardi
Cast: Luis Gerónimo Abreu, José Ramón Barreto, Shany Nadan, María José Vargas

Exhibition date (in 2020):
09/22 to 01/11/2021

7. *MUJERCITAS*

Production: Laura Visconti Producciones
Direction: Grazia D'Angelo, Luis Padilla
Script: César Sierra
Cast: Daniela Alvarado, Adrián Delgado, Eduardo Serrano, Lourdes Martínez, Javier Valcárcel

Exhibition date (in 2020):
02/03 to 07/10

8. *CHICA VAMPIRO*

Production: TeleVideo
Direction: William Barragán, Toni Navia, Andrés Bierman
Script: Marcela Citterio
Cast: Estefany Escobar, Vanessa Blandón, Lorena García, Eduardo Pérez

Exhibition date (in 2020):
06/01 to 11/01

9. ¡QUÉ CLASE DE AMOR!

Production: BCC Producciones
y Venevisión International

Direction: Manuel Díaz
Casanova, Grazio D'Angelo

Script: Benjamín Cohen, Ana
Teresa Sosa, Gennys Pérez,
Verónica Álvarez

Cast: Tito Gómez, Aisha
Stambouli, Rosanna Zanetti,
Mayela Caldera, Georgina
Palacios, Mark Colina, Miguel
Ángel Tovar

Exhibition date (in 2020):
07/13 to 11/16

10. AUNQUE MAL PAGUEN

Production: Venevisión

Direction: Carlos Izquierdo

Script: Abigail Truchsess,
Alberto Barrera Tyszka

Cast: María Antonieta Castillo,
Miguel de León, Ana Karina
Manco, Yul Bürkle

Exhibition date (in 2020):
04/27 to 12/18

Ibero-American Observatory of Television Fiction

OBITEL, Santiago de Chile:

Ediciones UC, 2021. 407 p.; 14x21 cm



Ibero-American Television Fiction in Times of Pandemic

The Obitel yearbook edition corresponding to the year 2020, went through various serious challenges, triggered by the rise of a global pandemic caused by Covid-19, with unimaginable consequences for humanity. Likewise, the lack of financial support from Globo Universidade caused an unexpected change in our editorial tradition. A challenge that we overcome thanks to the commitment of eleven national research groups, which allowed their results to be published uninterruptedly for 15 years to come to light again.

A common protocol for all research teams is in place and focuses on monitoring serial fiction broadcast on open to air television. However, the changes and technological advances of recent years, with regard to new forms of distribution, have led to the integration of monitoring, fiction shown in VoD, as well as a succinct monitoring of pay television channels and the behavior of audiences in digital environments. With this, each year the field of research is expanded without losing sight of the main objective: the observation of some variables that affect the process of circulation of serialized fiction content in Ibero-America.

During 2020, the Covid-19 pandemic not only limited and imposed biosafety protocols that forced producers of serial fiction content to stop, postpone and transform production plans; it was also an opportunity to include the pandemic in the narratives, as well as to reinvent forms of production and exhibition, in which the Internet and various online communication tools played a key role. This was a determining factor in identifying the diversity of initiatives undertaken by large corporations, as well as to underscore the critical role of independent producers and even by the so-called prosumers, who used the lockdown time of the first months of the year 2020, to make innovative proposals. What was experienced in the year 2020 also revealed the deep inequalities that still prevail in our countries in which access to the Internet presents unfathomable difficulties and results in the widening of the gap between connected and disconnected. For the latter, television serial fiction is central in the enjoyment that is possible and experienced on broadcasting waves and we do not lose sight of that.