

HISPANIC USA: UNIVISION RETAKES ITS LEADERSHIP AND BECOMES TELEVISA-UNIVISION¹

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Introduction

In 2021 the Hispanic television continued its transformation process mostly triggered by the dynamics of the new television landscape of digital platforms. The reorganization of the Spanish-language television industry has been in the process for several years, with the buying of Azteca America by HC2 in 2017, the acquisition of EstrellaTV by HPS Investment Partners in 2019, and the takeover of Univision Communications by Searchlight Capital and ForgeLight in 2020. Which means that only in the last five years, four of the five national Spanish-language television networks changed ownership, with the only exception of Telemundo owned by NBC/Comcast since 2011. But in 2021 a corporate reorganization took place with a binational scope and deep implications for the industry: the U.S. Hispanic-oriented corporation Univision and the Mexican media company Televisa merged, creating a larger corporation named TelevisaUnivision. Under this new media organization are included the national broadcasting television networks Univision and UniMás, in the United States; El Canal de las Estrellas, and Canal 5, in Mexico; as well as 36 television networks and 55 TV stations in the United States, and 222 TV stations affiliated to 4 broadcasting television networks in Mexico, and the services of the digital platforms PrendeTV (renamed Vix) and Blim TV.

The emergence of a very competitive field of new SVoD (Subscription Video on Demand) services also has triggered an important demand for Spanish-language content for these global corporations; in particular, Latin American productions. This new competitive landscape would lead to the creation of this binational media

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corporation TelevisaUnivision. With the launch of PrendeTV in 2021, which was transformed into Vix and Vix+ at the beginning of 2022, the new TelevisaUnivision would try to position itself as an important contender in the SVoD services arena, by placing the programming of the two hegemonic media corporations in Spanish language in Mexico and the United States under the same digital platform.

1. USA Hispanic audiovisual context in 2021

1.1. Open television in the USA Hispanic market

Chart 1. Hispanic national broadcasting television networks in the USA

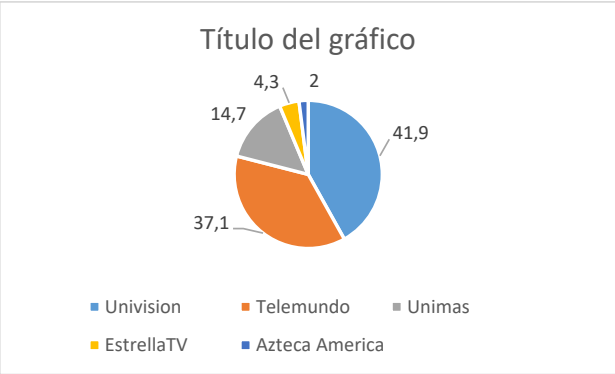
Private Networks (5)
Azteca America
EstrellaTV
Telemundo
UniMás
Univision
PRIVATE NETWORKS: 5

Source: Obitel USA Nielsen

The landscape of national broadcasting television in the United States has not changed in the last five years in relation to the number of television networks, since MundoMax, a Spanish-language television network, was closed in 2016.

Graph 1. TV audience’s share per network.

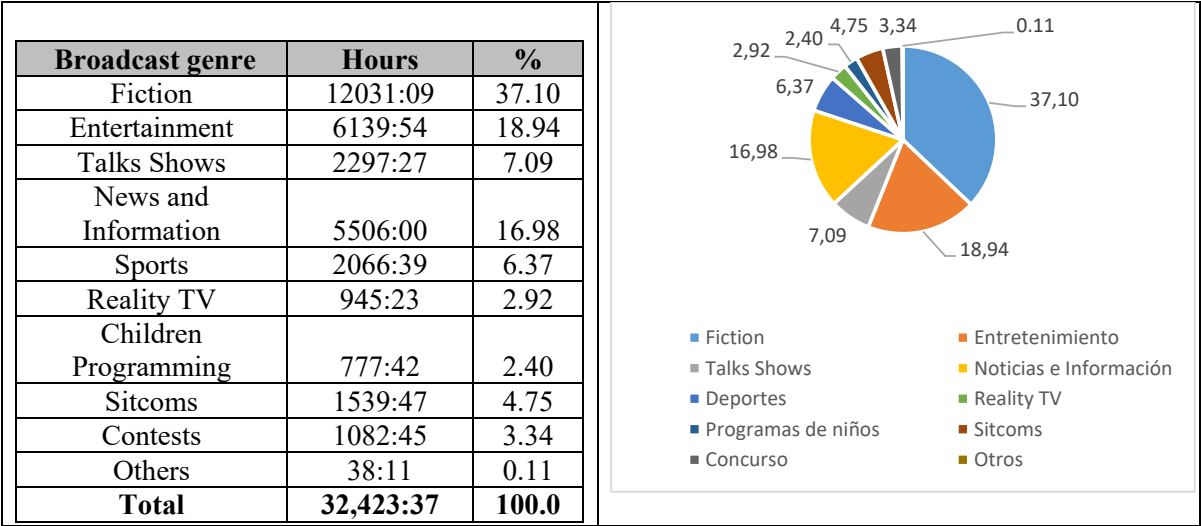
Network	AA (000)	Share %
Univision	414	41.9
Telemundo	366	37.1
UniMás	145	14.7
EstrellaTV	42	4.3
Azteca America	20	2.0
TOTAL	987	100



Source: Obitel USA Nielsen.

The home audience share in 2021 was consistent with the one in 2020. Again, Univision was the network that attracted more audiences in Spanish-language broadcast television in 2021, with an audience share of 41.9%, slightly higher than the 41.0% from 2020. Telemundo took the second place, with an audience share of 37.1%, slightly lower than the 37.5% from 2020. The third place was taken by UniMás with an audience share of 14.7% in 2021, one point higher from the 13.8% from 2020. Meanwhile EstrellaTV and Azteca America lost audience share from 2020 to 2021. EstrellaTV was down to 4.3% audience share from the 5.2% it had in 2020. Azteca America also was down to 2.0% audience share from the 2.6% gotten in 2020.

Graph 2: Hours of TV programming by genre



Source: Obitel USA Nielsen.

In 2021, fiction was again the genre with more hours on the screen in Spanish-language television. This year fiction represented 37% of total hours, one point up from the 36% in 2020, and two points up from the 35% in 2019. One of the reasons for this increase is linked to the lockdown caused by the Covid-19 pandemic in 2020 and 2021 in the United States. The entertainment genre occupies the second place with 18.9%, just one point down from the 20% it had in 2020, and two points below the 21% from 2019. In third place, news and information reached 17%, which is consistent with the 17% from 2020, and the 16.8% from 2019. Sports recovered its screen position with 6.4% in 2021, almost two points up from the 4.7% it had in 2020, and consistent with the 6.7% from 2019. Sports was the television genre more negatively impacted by the pandemic, because most of the sports events were canceled in 2020. But in 2021, the genre came back gradually to claim its position.

1.2. Pay TV and VoD platforms in the United States in 2021

The following table shows the ratings from the Spanish-language pay TV networks in the USA, but it is important to underscore that these ratings are measured in the context of the rating system which also includes all the English-language television networks in the United States.

Chart 2. Hispanic Pay TV channels in the USA

The ten most watched pay TV Hispanic channels in the USA			
Channel	Genre	Origin	Rating
Galavisión	General	USA	0.2
TUDN	Sports	USA	0.2
Universo	General	USA	0.1
Telexitos	Fiction	USA	0.1
Discovery en Español	Information	USA	0.1
Fox Deportes	Sports	USA	0.1
ESPN en Español	Sports	USA	0.1
Discovery familia	Information	USA	0.1
CNN en Español	News	USA	0.0
IN Sports	Sports	Qatar	0.0

Source: Obitel USA Nielsen.

Galavisión, Universo and Telexitos are networks which offer mostly fictional content, and they are also the channels with the highest audience ratings in Hispanic pay TV. The programming strategy of these channels is mostly to recycle the programming content previously released by their sister broadcasting national television networks, which are also part of the larger portfolio of their media conglomerates.

Galavisión, a network from TelevisaUnivision (formerly Univision Communications), is the channel with the highest rating/share, which has had as a programming strategy to give a second life to Televisa’s fictional content premiered first in Univision or UniMás, its sister broadcasting networks in the USA. However, in 2021, Galavisión included in the programming lineup some new releases from Televisa Mexico, such as the comedy *Julia vs Julia* and *Perdiendo el Juicio*. Also, Universo has been a channel that recycles programming from its sister network Telemundo (both properties of NBC-Comcast), but it

has also some original programming particularly in the domain of Reality TV with shows such as *I Love Jenny*, *The Riveras*, and *Larrymania*, among the most successful.

Chart 3. VoD in the USA Hispanic

Most active VoD platforms in 2021
Netflix, Prime Video (Amazon), HBOMax (WarnerMedia), Disney+, Hulu, Peacock (NBCUniversal/Comcast), Apple+, Paramount+ (Paramount Global, formerly CBSViacom), Starz, Showtime, Vix (formerly PrendeTV)
TOTAL: XX

Source: Obitel USA

In 2021, the main media conglomerates already had a digital platform to fight a tough battle for the video streaming market. This required a whole reorganization of the media landscape in the United States. For this purpose, Disney went into a process of consolidation by acquiring 20th Century Fox, Marvel and Lucas Entertainment; followed by AT&T/Warner which is merging with Discovery Inc. to create WarnerMedia Discovery. In the same way, CBS Viacom is transformed into Paramount, and NBC-Universal/Comcast launched Peacock, a platform that has the content catalog from Telemundo. Univision launched in 2021 PrendeTV, but in the merger process with Televisa would become Vix in 2022.

1.3. Independent production houses in television fiction

Independent production houses keep playing a key role in the Hispanic television market of fictional production in the United States in 2021. The production houses such as Somos Production, Endemol Shine, Boodog, Pinolywood were behind the release of *Súbete a mi Moto*; meanwhile the production houses Casablanca, VIP 2000, and Yahayra Films were behind *Encrucijada*, both fictions premiered in EstrellaTV. Whereas, Argos Comunicación remains as the main production house for Telemundo, with the release of *Buscando a Frida* and *Falsa Identidad 2*, W Studios also remains the most important independent production house for Televisa and Univision. In 2021, Univision premiered the telenovela *Si Nos Dejan*, produced by W Studios and Televisa.

1.4. Financial sources for the audiovisual sector

2021 was a good year for Univision, which increased its income by 11.8% for a grand total of USD \$2,841 billion, in contrast with the USD \$2,541 billion income reported in 2020. This includes their business on radio, television networks (Media Networks) and operation expenses. Only from Media Networks, in 2021 the corporation reported earnings of USD \$2,606.3 million, an increase from the USD \$2,351.8 million earned in 2020. In regards to advertising, Univision's revenues for the year in this area was USD \$1,400.6 million, higher than the USD \$1,151.4 million from 2020; while income from subscriptions and content licensing was of USD \$1,112.3 million, in the year, up from the USD \$1,107.6 of 2020 (4Q 2021, TelevisaUnivision).

Comcast, the telecommunications corporation owner of NBC-Universal and proprietres of the Telemundo network, reported income of USD \$116,385 million in 2021, up from the USD \$103,564 of 2020, which meant an increase of 12.4%. In its financial report, NBCUniversal showed an annual income from its different divisions (Media, Studios, Parks) of USD \$34,319 million higher than the USD \$27,211 of 2020, which represents an increase of 26.1%. When we look only to media income which includes the broadcasting networks NBC and Telemundo, an array of PayTV channels, the division had earnings of USD \$22,870 million in 2021, up from the USD \$18,936 in 2020, which represents an increase of 20.3% from last year (4Q Comcast, 2021).

1.5. Communication policies (*laws, reforms, incentives, digital TV, etc.*)

During 2021, a series of discussions took place in relation to the way social media should be regulated, due to its role in the increasing number of hate speech and the spread of misinformation, with nefarious effects in the increasingly polarized socio-political and cultural realities in the United States. Some proposals pointed out by Cusumano, Yoffie, and Gawer (2022) consider some different ways to pay attention to this problem, which go from taking away the power of these giant corporations by splitting them up. Dividing Facebook in several different corporations, for instance, Facebook, Instagram and WhatsApp should be separate companies with different owners. The same for Google or Twitter. Another way would be to derogate Section 230 from the Telecommunication Law, which exempts the digital platforms companies from any legal responsibility as a result from the content produced and distributed by the users. Another option would be that the government apply a regulation and supervision on the algorithms that rule the distribution and circulation of platform content. However, these three proposals have their disadvantages and their own difficulties of implementation.

1.6. Digital and mobile connectivity infrastructure

Hispanics are the social group that depend the most on smartphones to access the internet: 25% of the USA Hispanic population only have internet access by smartphone, in contrast to the 17% of African Americans, and the 12% of the white population (Atske & Perrin, 2021). In relation to digital platform services, in the United States there exist around 340 million subscribers of OTT services. In contrast to the increasing number of subscriptions to OTT platforms and services, the decreasing trend in pay TV subscriptions continues, which in 2020 were only 60% subscriptions in relation to the 80% from 2015 (Holleran, 2021). According to the measures offered by Nielsen de Gauge, these changes can be seen in the way audiences spend their time using a variety of technologies with access to content. By November 2021, streaming already represented the 28% of audience's consumption time, higher than the 27% of the consumption time dedicated to broadcasting television, and slowly closing the gap with the time dedicated to watch cable television, which represents 37%, a number that is decreasing (The Gauge, 2021).

2. Analysis of the year: National and Ibero-American premiere fiction in 2021

The dynamics of programming and production established in 2020 persist in 2021. The number of titles premiered in 2021 were lower than last year, however, this does not mean that there were less hours of production because, in spite of having less titles, it can be said that the number of hours in national and Ibero-American production stayed stable, in relation to last year. It is important to underscore that, apart from the deceleration that Covid-19 brought to the industry since 2020, something that is having a considerable impact in the number of titles premiered in television fiction has been the persistence, and in some case the increase of Turkish dramas in primetime schedules. This year there were seven new Turkish fictional titles included in the lineup; six of them in primetime, and one in the morning slots.

TABLE 1. Premiered fictions broadcast in 2021
(national and imported from Obitel countries, and co-productions) .

PREMIERED NATIONAL TITLES – 8	
Estrella TV	Univision
1. <i>Súbete a Mi Moto</i> (series, USA/Mexico)	3. <i>Como dice el Dicho</i> (Unitary, Mexico)
2. <i>Encrucijada</i> (anthology USA/Mexico)	4. <i>La Desalmada</i> (telenovela, Mexico)
Telemundo	5. <i>Diseñando tu Amor</i> (Telenovela, Mexico)
3. <i>Buscando a Frida</i> (telenovela USA/Mexico)	6. <i>Dulce Ambición</i> (telenovela, Brazil)
4. <i>Falsa Identidad 2</i> (telenovela, USA/Mexico)	7. <i>Imperio de Mentiras</i> (telenovela, Mexico)
5. <i>Malverde: El Santo Patrón</i> (telenovela)	8. <i>¿Qué le Pasa a Mi Familia?</i> (telenovela, Mexico)
6. <i>Parientes a la Fuerza</i> (telenovela)	9. <i>Quererlo Todo</i> (telenovela, Mexico)
7. <i>La Suerte de Loli</i> (telenovela)	10. <i>La Rosa de Guadalupe</i> (unitary, Mexico)
Univision	11. <i>Te Acuerdas de Mí</i> (telenovela, Mexico)
8. <i>Si Nos Dejan</i> (telenovela, USA/Mexico)	12. <i>Vencer el Desamor</i> (telenovela, Mexico)
PREMIERED IMPORTED TITLES - 16	13. <i>Vencer el Pasado</i> (telenovela, Mexico)
Azteca America	UniMás
1. <i>Desaparecida</i> (telenovela, Mexico)	14. <i>Esta Historia Me Suena</i> (unitary, Mexico)
Telemundo	15. <i>Huérfanos de su Tierra</i> (telenovela, Brazil)
2. <i>Café con Aroma de Mujer</i> (telenovela, Colombia)	16. <i>La Reina del Flow</i> (telenovela, Colombia)
TOTAL OBITEL PREMIERED TITLES - 24	

Source: Obitel USA Nielsen.

There were a total of 24 premiered titles in 2021, below the 29 titles from 2020. Eight of them were national titles, one title below the nine that premiered in 2020, and four below the 12 titles premiered in 2019. In relation to Ibero-American titles, there were 16 premiered titles in 2021, below the 19 premiered in 2020, and way below the 33 from 2019.

TABLE 1b. Rerun titles broadcast in 2021
(national and imported from Obitel countries, and co-productions).

NATIONAL RERUN TITLES – 9 Telemundo - 7 titles 1. <i>El César</i> (series, USA/Mexico) 2. <i>Decisiones</i> (unitary) 3. <i>Falco</i> (series, USA/Colombia) 4. <i>Pasión de Gavilanes</i> (telenovela, USA/Colombia) 5. <i>El Secreto de Selenia</i> (series) 6. <i>Sin Senos Sí Hay Paraíso 2</i> (telenovela, USA/Colombia) 7. <i>Sin Senos Sí Hay Paraíso 3</i> (telenovela, USA/Colombia) UniMás – 2 titles 8. <i>Bellas y Bestias</i> (series, USA/Mexico) 9. <i>La C.Q.</i> (telenovela, USA/Mexico) IMPORTED RERUN TITLES – 26 Azteca America – 4 titles 1. <i>Lo Que Callamos las Mujeres</i> (unitary, Mexico) 2. <i>Mujeres Rompiendo el Silencio</i> (unitary, Mexico) 3. <i>Cielo Rojo</i> (telenovela, Mexico) 4. <i>Emperatriz</i> (telenovela, Mexico) EstrellaTV - 1 title 5. <i>Historias Delirantes</i> (series, Mexico)	Telemundo – 2 titles 6. <i>Historias de la Virgen Morena</i> (unitary, Mexico) 7. <i>La Ley del Corazón</i> (telenovela, Colombia) Univision – 5 titles 8. <i>La Madrastra</i> (telenovela, Mexico) 9. <i>Mañana es Para Siempre</i> (telenovela, Mexico) 10. <i>Nosotros los Guapos</i> (telenovela, Mexico) 11. <i>Tontas No Van al Cielo</i> (telenovela, Mexico) 12. <i>Un Gancho al Corazón</i> (telenovela, Mexico) UniMas – 14 titles 13. <i>Alborada</i> (telenovela, Mexico) 14. <i>Amigas y Rivalas</i> (telenovela, Mexico) 15. <i>Amor Bravío</i> (telenovela, Mexico) 16. <i>Amores Verdaderos</i> (telenovela, Mexico) 17. <i>Carita de Ángel</i> (telenovela, Mexico) 18. <i>Complices al Rescate</i> (telenovela, Mexico) 19. <i>Contra el Viento y Marea</i> (telenovela, Mexico) 20. <i>Cuna de Lobos</i> (telenovela, Mexico) 21. <i>Destilando Amor</i> (telenovela, Mexico) 22. <i>La Doble Vida de Estela Carrillo</i> (telenovela, Mexico) 23. <i>Entre el Amor y el Odio</i> (telenovela, Mexico) 24. <i>Fuego en la Sangre</i> (telenovela, Mexico) 25. <i>Hasta que el Dinero Nos Separe</i> (telenovela, Mexico) 26. <i>Porque el Amor Manda</i> (telenovela, Mexico) TOTAL RERUNS: 35
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Source: Obitel USA Nielsen.

There was a lower number of reruns in 2021 with 35 titles, below the 46 titles from 2020, and the 50 rerun titles in 20219. A programming strategy that seemed to have disappeared this year was the repetition past midnight on the same day of the episodes premiered in primetime. This time, particularly Telemundo decided to include, past midnight, some reruns from previous years, instead of broadcasting the content just premiered hours before.

TABLE 2. Premiered national fiction in 2021
and its evolution in the last five years.

Year	Titles	%	Hours	%
2017	24	39.3	1000:10	27.0
2018	20	38.5	933:11	32.2
2019	12	26.7	512:30	20.1
2020	9	32.1	366:07	22.8
2021	8	33.0	420:00	23.5

Source: Obitel USA Nielsen

This table shows the decrease of national fictional titles and production hours thought the years. In 2021, the number of titles decreased to just the third part of the ones premiered in 2017. In relation to production hours, national production in 2021 dropped 50% from the produced hours in 2017. One of the factors that seems to impact the decrease of titles in 2021, was the surge of different titles and seasons from the Super Series, combined with the number of miniseries with different seasons premiered in 2017 and 2018. These series and miniseries such as *El Chapo 1, 2, 3*; *Blue Demon 1, 2, 3*, and *Luis Miguel la Serie*, were produced in a moment in which digital platforms which were already showing to have an important role and they were doing production agreements with Spanish-language television looking for new formats to attract audiences.

TABLE 3. Premiered national fictional formats in 2021,
and their evolution in the last five years.

Format	Titles					Hours				
	2017	2018	2019	2020	2021	2017	2018	2019	2020	2021
Telenovela	15	14	8	7	6	891:00	860:30	466:30	342:68	387:00
Series	4	5	3	1	1	40:00	65:40	33:00	10:00	19:00
Miniseries	3	0	0	0	0	34:00	0:00	0:00	0:00	0:00
Telefilm	0	0	0	0	0	0:00	0:00	0:00	0:00	0:00
Unitary	1	1	1	1	1	20:00	7:00	13:00	14:00	14:00
Docudrama	1	0	0	0	0	14:00	0:00	0:00	0:00	0:00
Others	0	0	0	0	0	0:00	0:00	0:00	0:00	0:00

Source: Obitel USA Nielsen.

In spite of the fact that the number of productions has been reduced, the telenovela format still keeps its position as the most important format for the USA Hispanic television. On the one hand, this reduction in telenovela production is partially caused because of the drop in Telemundo Super Series productions and their differ-

ent seasons; these programming spaces were taken by Turkish drama. On the other hand, the production of series and miniseries lowered down in number of titles and hours. Meanwhile unitary programs have maintained their small but constant presence.

TABLE 4. Premiered Fiction broadcast in 2021: countries of origin

Country	Titles	%	Hours	%
NATIONAL (total)	8	33.0	420.00	25.8
OBITEL COUNTRIES (total)	16	67.0	1208.23	74.2
Argentina	0	0.0	0.00	0.0
Brazil	2	8.3	72.56	4.5
Chile	0	0.0	0.00	0.0
Colombia	2	8.3	163.38	10.0
Ecuador	0	0.0	0.00	0.0
Spain	0	0.0	0.00	0.0
USA Hispanic	8	33.3	420.00	25.8
Mexico	12	50.1	971.49	59.7
Peru	0	0.0	0.00	0.0
Portugal	0	0.0	0.00	0.0
Uruguay	0	0.0	0.00	0.0
Venezuela	0	0.0	0.00	0.0
CO-PRODUCTIONS (Totales)	5*	20.8*	218.57*	13.4*
National Co-productions	5	20.8	218.57	13.4
Obitel Countries Co-productions	0	0	0.00	0
TOTAL	24	100.0	1628.39	100.0

Source: Obitel USA Nielsen.

Although the number of premiered titles in 2021 was 24, lower than the 28 from 2020; the total number of premiered hours was consistent with 1,628 premiered hours in 2021, slightly higher from the 1,610 hours from 2020. In relation to titles and hours by country of origin, Mexico leads the table with 59.7% in production hours in 2021, three points below the 62. 9% reached in 2020, and the 62.4% of hours premiered in 2019. In relation to premiere hours, Mexico is followed by Colombia, which has one percentage point higher in 2021, with 10% compared to 9.6% of the premiere hours in 2020, and 8.4% in 2019. Brazil keeps the third place, but with a decrease of this country’s presence in production hours, with 4.5% in 2021, slightly below the 4.8% in 2020, but significantly lower from the 9.1% in 2019.

TABLE 5. National and Ibero-American fiction formats in 2021

Format	Titles				Hours			
	National	%	Rest of Obitel	%	Nacionales	%	Rest of Obitel	%
Telenovela	6	75.0	13	81.3	387:00	92.2	869:23	71.9
Series	1	12.5	0	0.0	19:00	4.5	0:00	0.0
Miniserie	0	0.0	0	0.0	0:00	0.0	0:00	0.0
Telefilm	0	0.0	0	0.0	0:00	0.0	0:00	0.0
Unitary	1	12.5	3	18.8	14:00	3.3	339:00	28.1
Docudrama	0	0.0	0	0.0	0:00	0.0	0:00	0.0
Others	0	0.0	0	0.0	0:00	0.0	0:00	0.0
Total	8	100.0	16	100.0	420:00	100.0	1208:23	100.0

Source: Obitel USA Nielsen.

In relation to formats, telenovelas dominate in number of national and Ibero-American titles. However, if we consider the number of broadcast production hours in relation to percentages, anthologies and unitary programs clearly represent an important category. With only three titles: *La Rosa de Guadalupe*, *Como Dice el Dicho* and *Esta Historia me Suena*, this format reaches more than 28.1% from the total broadcast production hours of content coming from Ibero-America. The series seem to be losing ground.

TABLE 6: 10 Most watched titles in 2021

Title		Channel	Production	Format/genre	No. of chap/ep in 2020	Time Slot	Rating	Share
1	<i>La Desalmada</i>	Univision	Televisa	Telenovela Drama	80	Primetime	6.8	22.1
2	<i>Vencer el Desamor</i> *	Univision	Televisa	Telenovela Drama	62	Primetime	6.8	17.2
3	<i>Si Nos Dejan</i>	Univision	Televisa W Studios	Telenovela Drama	83	Primetime	6.4	18,4
4	<i>Vencer el Pasado</i>	Univision	Televisa	Telenovela Drama	49	Primetime	6.0	17.1
5	<i>Te Acuerdas de Mí</i>	Univision	Televisa	Telenovela Drama	74	Primetime	5.9	15.7
6	<i>Imperio de Mentiras</i> *	Univision	Televisa	Telenovela Drama	27	Primetime	5.9	15.3
7	<i>Dulce Ambición</i> *	Univision	TVGlobo	Telenovela Drama	41	Primetime	5.5	16.1
8	<i>Diseñando tu Amor</i>	Univision	Televisa	Telenovela Drama	116	Primetime	5.3	15.4
9	<i>La Rosa de Guadalupe</i> *	Univision	Televisa	Unitary Drama	201	Primetime	5.3	15.3
10	<i>¿Qué le Pasa a Mi Familia?</i>	Univision	Televisa	Telenovela Romantic comedy	80	Afternoon	4.8	14.2
Total of national productions: 1				Original foreign screenplay: 10				
10%				100%				

Source: Obitel USA Nielsen

(*) Started in 2020 but the title kept broadcasting in 2022.

In 2021, not only Univision retook its position as dominant network in the most watched list; but also was able to break with the dominance of Turkish drama which in the last years has had the first place in rating numbers. This time *La Desalmada*, *Vencer al Desamor* and *Si Nos Dejan*, had more ratings than the Turkish telenovela *La Hija del Embajador* which was the the Turkish production with more rating points in 2021. *Dulce Ambición*, a Brazilian production from Rede Globo was able to reach a place in the most watched titles. Meanwhile, the unitary *La Rosa de Guadalupe* again took a place among the ten most watched fictions, for a fourth consecutive year, which underscores the key role of this format, in hours quantity but also popularity.

TABLE 6a: The 10 most watched national titles in 2021

Titles		Channel	Production	Format/genr e	No. of chap/ep (in 2021)	Time Slot	Rating	Share
1	<i>Si Nos Dejan</i>	Univision	Televisa W Studios	Telenovela Drama	83	Primetime	6.4	18.4
2	<i>Buscando a Frida</i>	Telemundo	Telemundo Argos	Telenovela Drama	84	Primetime	4.3	12.8
3	<i>La Suerte de Loli</i>	Telemundo	Telemundo	Telenovela Comedy	103	Primetime	4.2	11.3
4	<i>Malverde: El Santo Patrón</i>	Telemundo	Telemundo	Telenovela Vintage	59	Primetime	3.7	11.9
5	<i>Falsa Identidad 2</i>	Telemundo	Telemundo Argos	Telenovela <i>Narconovela</i>	19	Primetime	3.6	10.4
6	<i>Parientes a la Fuerza</i>	Telemundo	Telemundo	Telenovela Comedy	39	Primetime /afternoon	3.4/1.3	9.8/8.9
7	<i>Súbete a mi Moto</i>	EstrellaTV	Somos Production, Endemol Shine, Boomdog, Pinolywood	Series Musical Bioseries	19	Sunday/ Primetime	0.2	0.5
8	<i>Encrucijada</i>	EstrellaTV	Casablanca, VIP 2000, and Yahayra Films	Unitary Drama	14	Sunday/ afternoon	0.2	0.5
Total of national productions: 8				Original national screenplays: 5				

Source: Obitel USA Nielsen

The title *Si Nos Dejan*, a co-production between Televisa and the binational production house W Studios, took the first place in the list of the most watched national titles. This title was followed by *Buscando a Frida*, a remake of *¿Dónde Está Elisa?*, taking the second place of the list. This was an important bet by the network, because *¿Dónde Está Elisa?*, the first remake of Telemundo, premiered in 2010, it was also an adaptation of the original Chilean telenovela, and was the fictional title with more ratings for Telemundo that year. The new remake was produced by Argos in Mexico City, which underscores the key role of this production house for Telemundo. It is important to point out the inclusion of two titles produced by an independent production house from the United States broadcast in EstrellaTV.

TABLE 7: Audience profile from the ten most watched by gender and age.

Title		Channel	Gender %	
			Female	Male
1	<i>La Desalmada</i>	Univision	65	35
2	<i>Vencer el Desamor</i>	Univision	66	34
3	<i>Si Nos Dejan</i>	Univision	63	37
4	<i>Vencer el Pasado</i>	Univision	65	35
5	<i>Te Acuerdas de Mí</i>	Univision	68	32
6	<i>Imperio de Mentiras</i>	Univision	65	35
7	<i>Dulce Ambición</i>	Univision	66	34
8	<i>Diseñando tu Amor</i>	Univision	64	36
9	<i>La Rosa de Guadalupe</i>	Univision	62	38
10	<i>¿Qué le Pasa a Mi Familia?</i>	Univision	62	38

Title		Age cohort %					
		02-11	12-17	18-24	25-34	35-49	50+
1	<i>La Desalmada</i>	9	4	5	9	27	47
2	<i>Vencer el Desamor</i>	10	4	5	11	21	50
3	<i>Si Nos Dejan</i>	8	5	7	9	24	47
4	<i>Vencer el Pasado</i>	9	4	5	9	26	47
5	<i>Te Acuerdas de Mí</i>	8	4	5	9	23	51
6	<i>Imperio de Mentiras</i>	8	3	4	10	24	51
7	<i>Dulce Ambición</i>	6	4	3	9	23	55
8	<i>Diseñando tu Amor</i>	10	5	7	10	22	46
9	<i>La Rosa de Guadalupe</i>	11	5	6	10	23	44
10	<i>¿Qué le Pasa a Mi Familia?</i>	10	1	9	10	22	47

Source: Obitel USA Nielsen.

The demographic data obtained from the 2021 ten most watched fiction suggest a polarization between the audience that consumes broadcasting television, in contrast with the young audience that mostly consume digital platforms. On the one hand, in relation to gender, these fictions were mostly consumed by female audiences with percentages that go from 60% to 70% of women viewership. This seems to be as a consequence of the absence of narconovelas, action-oriented telenovelas and comedy-oriented telenovelas, which historically have shown a larger presence and viewership from male audiences. On the other hand, in terms of age cohort, the demographic shows a clear tendency, in which around 50% of the audience of the ten most watched fictions were older than 50 years old.

If we take into account that the 18 to 49 years-old sector constitutes the most important audiences for advertising agencies, we can see that this key age range was only 38% of the total of ten most watched fiction audiences. If we think about the younger audience, which is the 12 to 34 years-old sector, they did not represent even

20% of this audience. This is in contrast to the younger profile demo who consume fiction through digital platforms. Which is an important problem for the broadcasting television industry about its financial viability, in particular, in the domain of the fictional production, because of its higher production budgets.

3. VoD Monitoring in 2021

3.1 The VoD platform market in 2021

The vitality of the digital platforms market in the United States can be exemplified by the continuous growth on the presence of platforms such as Netflix, Prime Video, HBOMax, Disney+, Hulu, Peacock, Apple+, Paramount+, Starz, Showtime, and YouTubeTV. Just three years ago there were only three main players: Netflix, Prime Video, and Hulu. But in just a period of a couple of years, the Video on Demand (VOD) field, in particular under the subscription business model (SVoD) had a very important growth. To date, the streaming market in the United States represents 32 billion dollars, with a growth projection of 45 billion dollars by 2025 (Arnold, 2022). In the United States, 80% of homes have at least one SVoD provider; and from them, 78% have a subscription with one of the three dominant players in the industry: Netflix, Prime Video or Hulu.

3.2. Local VoD platforms offer in 2021 (national, regional in the country)

For the purpose of our work in the context of Obitel, we consider, in the context of national/local platforms, only the content offering in relation to Latinos in the United States, in particular for Spanish-language speakers. In 2021, the presence of Pantaya (Hemisphere Media Group) continued, coupled with the launch of PrendeTV (Univision) which was renamed as Vix in 2022. Due to the fact that the main business model of both platforms is based on the recycling of content from their corporate owners, their programs are not considered as premiered national titles in the SVoD table. But in the context of the launching of Vix by 2022, it is expected that it will offer new national titles targeting Latinos, to be premiered on the platform.

3.3. VoD análisis in 2021: premiered national fiction titles and co-productions.

The growth of SVoD platforms in the United States has also signified an increasing growth and presence of the streaming market in Ibero-America. In order to be competitive in this region, the platforms have made an important effort in commissioned productions with independent productions houses in Spanish and Portuguese languages, a move that has increased their original titles in the USA content catalogs and also at regional level.

TABLE 8. National fiction titles and co-productions
broadcast in 2021 in VoD systems

NATIONAL PREMIERED TITLES	CO-PRODUCTIONS
Netflix – 4 national titles - latino 1. <i>Selena: La Serie S.2</i> (Series, USA, Latino) 2. <i>Gentefied S.2</i> (Series, USA, Latino) 3. <i>Brand New Cherry Flavor S.1</i> (Series, USA, Latino) 4. <i>On My Block S.4</i> (Series, USA, Latino)	Netflix – 17 titles 1. <i>Luis Miguel: La Serie S.2</i> (Series, USA/Mexico) 2. <i>Luis Miguel: La Serie S.3</i> (Series, USA/Mexico) 3. <i>Monarca S.2</i> (Series, USA/Mexico) 4. <i>Somos S.1</i> (Series, USA/Mexico) 5. <i>Vecinos en Guerra S.1</i> (Telenovela, USA/Mexico) 6. <i>Control Z S.2</i> (Series, USA/Mexico) 7. <i>Todo va a Estar Bien S.1</i> (Series, USA/Mexico) 8. <i>Narcos: México S.3</i> (Series, USA/Mexico) 9. <i>¿Quién Mató a Sara S.1</i> (Series, USA/Mexico) 10. <i>¿Quién Mató a Sara S.2</i> (Series, USA/Mexico) 11. <i>Sky Rojo S.1</i> (Series, USA/Spain) 12. <i>Sky Rojo S.2</i> (Series, USA/Spain) 13. <i>El Vecino S.2</i> (Series, USA/Spain) 14. <i>Elite S.4</i> (Series, USA/Spain) 15. <i>Elite Short Stories S.1</i> (Series, USA/Spain) 16. <i>Valeria S.2</i> (Series, USA/Spain) 17. <i>Jaguar S.1</i> (Series, USA/Spain)
Amazon Prime – 1 national title - latino 1. <i>With Love</i> (Series, USA, Latino)	Amazon Prime – 12 titles 18. <i>Maradona: Blessed Dream: S.1</i> (Series, USA/Argentina) 19. <i>5X Comedy</i> (Series, USA/Brazil) 20. <i>Dom</i> (Series, USA/Brazil) 21. <i>Desjuntados</i> (Series, USA/Brazil) 22. <i>Mañanas de Septiembre S.1</i> (Series, USA/Brazil) 23. <i>Pequeñas Coincidencias</i> (Series, USA/Spain) 24. <i>La Templanza</i> (Series, USA/Spain) 25. <i>El Cid S.2</i> (Series, USA/Spain) 26. <i>Parot</i> (Series, USA/Spain) 27. <i>Historias Para no Dormir</i> (Anthology, USA/Spain) 28. <i>El Juego de las Llaves</i> (Series, USA/Mexico) 29. <i>S.O.Z. Soldados o Zombies S.1.</i> (Series, USA/Mexico/Colombia)
HBOMax – 0 national titles - latino	HBOMax – 5 titles 30. <i>Entre Hombres</i> (Series, USA/Argentina) 31. <i>Días de Gallos</i> (Series, USA/Argentina) 32. <i>Mil Colmillos S.1</i> (Series, USA/Colombia) 33. <i>Todo lo Otro</i> (Series, USA/Spain) 34. <i>Amarres</i> (Series, USA/Mexico)
Disney+ – 0 national titles - latino	Disney+ – 3 titles 35. <i>Arnoldo Restaurantino S.1</i> (Series, USA/Argentina) 36. <i>Entrelazados S.1</i> (Series, USA/Argentina) 37. <i>Bia: un mundo al revés</i> (Telenovela, USA/Argentina)
Peacock – 0 national titles - latino	Paramount - 3 titles 38. <i>Asesino del Olvido</i> (Series, USA/Mexico) 39. <i>Los Enviados</i> (Series, USA/Argentina/Mexico) 40. <i>Cecilia</i> (Series, USA/Argentina/Mexico)
Paramount 0 national titles - latino	Hulu – 2 titles 41. <i>Insania</i> (Series, USA/Brazil) 42. <i>No es Mi Culpa</i> (Series, USA/Mexico)
Apple TV – 0 national titles - latino	Peacock – 1 title 43. <i>Dime Quién Soy: Mistress of War</i> (Series, USA/Spain)
	Apple TV – 1 title 44. <i>Acapulco</i> (Series, USA/Mexico)
Subtotal: 5	Subtotal: 44
Total: 49	

Source: Obitel USA

It is important to point out that, in the table above, the list of “national” titles these are all related to the Hispanic television market in the United States, and only considers titles premiered with the Latina/o audience, with productions in English, Spanish or Portuguese. This means, on the one hand, that the titles listed as national are produced thinking of the USA Latinx audiences, for that reason these are narratives linked to the specific realities of US Latinx population, and they are mainly productions in English-language. Paradoxically, the content offer for Latinos is integrated by content in Spanish and Portuguese, which is the language with a natural market in Ibero-American countries. It is therefore that in the “coproduction column” there are listed mostly commissioned titles given to independent production houses in Ibero-America. These commissioned productions have the double purpose of attracting audiences in national markets such as Argentina, Brazil, Colombia, Mexico or Spain, while also they will be an important component of the catalog offering for the USA domestic market for both mainstream and US Latinx audiences. This situation is the consequence of what seems to be the lack of interest from the digital platforms industry to produce Spanish and/or Portuguese language content for Latino audiences in the United States if there is not involved a Spanish-language television network as partners; or to have a possible domestic market in which this fiction, through process of localization in Latin American countries, Spain and Portugal, can increase the audiences for these platforms.

Netflix is the leader in content production, a position that has kept since 2015 when the platform started its strategy of content production from Latin America, with 17 titles in 2021, followed by Prime Video with 12 titles. But the list also underscores the surge in production from players who are looking to defy the dominion of Netflix and Prime Video, such as HBOMax and Disney+, with five and three titles respectively. The list also shows new players such as Peacock, Paramount+, and Apple+. In the same way, it reflects the prevalence of hegemonic centers of production in the region, which have been consolidated through the years and located in Argentina, Spain, Brazil, Colombia and Mexico, with an increasing offering of fictional titles through different platforms.

3.4. VoD narrative features in 2021

USA SVoD productions from the region, which come back as part of the catalog for USA Hispanics in the domestic market, show a great variety of genres and themes. Some of the genres have more presences in the SVOD catalog, such as thrillers, action-oriented dramas, and crime dramas. Arguably the most famous fictional title in platforms during 2021 was the Netflix original production *¿Quién Mató a Sara?* seasons 1 and 2, produced in Mexico by the production house Perro Azul. Within the thriller category there are also the narco series, such as the premiere of *Narcos: México* 3. Also, there are Biopics from famous artists and athletes which still are

very relevant; in this area, there was the premiere of *Selena* and *Luis Miguel: La Serie 2* and 3, *Maradona: Blessed Dreams*. For younger audiences, the series genre keeps an important presence with productions like *Control Z 2*, *Elite 4* and the *Elite Short Stories*. The romantic comedy also has a presence in all platforms with *Vecinos en Guerra* in Netflix, *El Juego de las Llaves* in Prime Video and *Acapulco* in Apple. There is also a line of production that addresses specifically the experience of the English-speaking Hispanic population in the United States. These titles develop narratives and socio-cultural realities important for the different Latinx social groups in the USA. *Gentefied 2*, and *On My Block 4*, address the very specific challenges faced by Chicana/o and Mexican populations in California. Particularly for second and third generation young English-speaking Latinx populations.

4. Fiction, interactivity and audience participation

In this section we talk about the relation of fictional content production, promotion, consumption, and audience interaction, we distinguish, in the first place, between two poles of interaction: the first the one that we defined as “**social interactivity**” which is led by different strategies deployed by the industry and the producers, in order to promote its content and to encourage audience interaction. The second one, which we call “**social participation**” that describes the way audiences respond organically to the offered content. In this second category, social media plays a key role by making visible the audience’s participation. In this occasion we focus on the remake of the telenovela *Café con Aroma de Mujer* a co-production of Telemundo with RCN Colombia, and it was broadcast in the Telemundo network from May 25 to September 27, 2021.

4.1. Social interactivity

Performance from the industry. Telemundo deployed a series of promotion strategies with the premiere and broadcast of the new version of *Café con Aroma de Mujer*. During the time of the broadcast of the telenovela, Telemundo posted, through its official site, a series of newsletters with a variety of themes related to the telenovela, referring to the specific details about the premiere and the talent part of the cast. It is noteworthy that the main promotion strategy was the use of Williams Levy’s image, the male telenovela protagonist, exploiting his stardom status to attract the attention of the female audience based on his sex appeal, but also to male audiences, because he is a well know telenovela star, to bring and maintain the attention of telenovela viewers.



In social media, Telemundo used Instagram to promote the main cast and the characters of the telenovela, using different dynamics of interaction between the talent and the account followers of “Cafeconaroma oficial.” Most of these dynamics started by presenting someone from the main cast and sharing some of their characteristics, preferences and tastes, in order to invite fans and followers do to the same in their own personal accounts using hashtags such as #Cafekaraoke and #MadresconaromadeCafe. In particular, these two hashtags stand out, because they were part of the topics and themes that fans followed as part of the telenovela narrative. On the one hand, the appropriation of the musical elements, in which fans dedicated the telenovela songs to some actors and actresses and to their real partners. On the other hand, the use of maternity elements which strongly resonate with female audiences and, in this case, allows the female followers to self-identify with the characters, particularly mothers, and their concerns expressed in the telenovela. Furthermore, the telenovela official account asked followers to tag the telenovela account in each of the posts made by their own. Thus, making evident that these dynamics have the goal of taking advantage of the users’ activities in their profiles to promote the telenovela without paying any money for this. In the other social media networks such as Twitter or Facebook, Telemundo made a recollection of the most controversial scenes to encourage discussions among fans and non-telenovela fans. The television network used its own programs such as *Telemundo 52*, *Suelta la Sopa*, *Buen Día* and *Al Rojo Vivo* to present interviews with the main talent, asking about the cast, the story that the telenovela was telling, as well as about their own personal lives, because the strategy is to publish and/or post the videos from these programs in YouTube with provocative titles to create controversies and to be shared in Facebook, and keep alive the interest in the telenovela due to these kind of audiences interactions.

4.2. Social participation

Performance from audiences. Audiences used digital platforms to share and to start a discussion about particular issues, or to look for information about the telenovela and its musical themes. For instance, Facebook audiences made comparisons

between the original telenovela produced more than 20 years ago, and this new one produced in 2021. Among the comparisons some point out as something good or interesting the fact that this is a modern version that new generations can relate to, through elements such as the instantaneity of using a smartphone to send messages and images, a resource that is shown in the telenovela several times, which add to the development of the telenovela story. Thus, new generations are prompt to defend the new telenovela version because they feel more identified with the social dynamics presented, such as sexual diversity, women as entrepreneurs and taking important decisions. However, for the generation that watched and lived the story with the first version, they prefer the original version because is inserted in the social dynamics considered proper for that generation in that moment of time.

Another of the telenovela outstanding topics happening in Facebook was the fact that audiences were searching for the telenovela music, from the original telenovela soundtrack to the different songs that La Gaviota sang to Sebastian (the protagonist couple), fans recognized in the music a good achievement and they asked to be able to hear these songs in their digital platforms.



The new version of *Café con Aroma de Mujer*, produced in 2021, address as central theme in the narrative elements the women empowerment, through the Gaviota character, which shows repeatedly that she is not the typical defenseless protagonist, neither the one waiting for the charming prince to get married and solve her problems. La Gaviota is known as a character that fights against any injustice or abuse against a person, mainly when it comes from men; also she wanted to be a successful entrepreneur to have her own land to cultivate, and harvest coffee, to learn and help her own community of women living in the countryside and working in the field on the coffee grains harvest. Likewise, we can also see that empowerment within the female villain of the story, Lucia San Clemente, who is also presented as an independent woman, empowered and confident, who do not put aside her own ambitions of economic wealth, and her desire to have a family. Social class differences are also a central element of this story, which is a current

topic, exemplified by the class difference between owners and entrepreneurs versus the peasants and the working class. Social class prejudice is exposed through the attitudes of some of the members of the Vallejo family, since the beginning, by the family matriarch Julia de Vallejo and her daughter and son, Paula and Ivan Vallejo. Social class relations are also visible in the telenovela through old gender dynamics in patriarchal contexts, when they become dynamics of emotional dependency. These patriarchal oriented situations are shown in the story when some of the female characters look for having a partner as the only path to live a happy, seemingly fulfilling life. Interestingly, the story presents to these female characters options, possible paths for economic independence and personal growth; which in many cases are achieved by some of the female characters, but in other cases, well established old traditional and highly *machista* dynamics seem to block the empowerment and personal growth of some female characters.



Although the telenovela exposes some central and current social issues, still the audience's discussion spin around romantic love and the kind of relationship that the protagonists have, giving their opinions about what was right or wrong in the process of the couples' courtship, and how they established the conditions of their relationships. Also, it is important to underscore that opinions and posts from the audiences are mostly marked by an "aspirational" element, in which they express the desire to have a relationship such as the one that La Gaviota y Sebastian have, furthermore, some express the aspiration to get somebody similar in physical and economic features of Sebastián Vallejo, the male protagonist of the story.

5. Highlights of the year 2021

The most important event of the year was the merger of Univision and Televisa, announced in April 2021. As a result, TelevisaUnivision was born as a binational corporation with headquarters in Miami and Mexico City. The portfolio of properties of TelevisaUnivision includes broadcasting corporations (radio and television), cable television channels and digital networks. In the field of broadcasting television networks, the corporate portfolio has six national television networks, which are integrated by two USA networks: Univision and UniMás, and the Mexican national

broadcasting networks: El Canal de las Estrellas, ForoTV, Canal 5, and Nu9ve. This is an unprecedented situation in the context of broadcasting media, which under the law bans foreign individuals or entities having broadcasting licenses or owning property on broadcasting stations (radio or television) under the argument that the waves travel on the air which is national property and constitutes a space for national security. It is important to point out that Mexican Televisa have already had, as owner, participation on Univision higher than the 25% authorized by the Federal Communication Commission (FCC), which was considered an exceptional case, because it was framed under the specific circumstance of a Spanish-language media corporation who targets an underserved ethnic minority in the United States. The creation of TelevisaUnivision, as it was pointed out since the beginning of this chapter, is the way in which both corporations want to face the new challenges post by the surge of new SVoD digital platforms, and their content offering, who have kept captive an important segment of the audience which traditionally was highly depended on the programming available through broadcasting television.

6. Transformations in television seriality and their impact on fictional television formats in Ibero-America in times of streaming

In order to understand the dynamics of seriality in the broadcasting television media ecosystem that coexist with the digital platforms offer, in which the audience's consumption dynamics have dramatically changed, we intend to make analysis of two fictions and the deployment of their narrative strategies to keep their potential audiences glued to their screens.

In order to make this comparative analysis, we have chosen two fictional thrillers, whose narrative structure is developed from a starting common element, which is to find the responsible of a crime that has been committed, a goal that became the driven element from the plot. For this purpose, we analyzed *Buscando a Frida* (Looking for Frida), a Telemundo production, made by the production house Argos Comunicación in Mexico City; and *¿Quién Mató a Sara?* (Who Killed Sara?) a Netflix original production, made in Mexico by the production house Perro Azul. What makes possible the comparison of both fictions is the fact that they are both thrillers, both police crime genre, and the plot of both narratives start with a crime that triggers the search for the responsible and this becomes the driven engine that connects both stories.

First, it is important to recognize the general formal features that structure the specific exhibition of these fictions, and later to identify the narrative elements that are deployed across the plot in both fictional titles.

Formal characteristics:

- 1) type of seriality (serial, series, or a hybrid of both),
- 2) format (telenovela, series, miniseries, tele-theater, anthology, docudrama),
- 3) number of chapters or episodes (1 to 12; 13 to 24; 25 to 60; 61 to 100, more than 100);

- 4) duration 25', 45', 60' or 90');
- 5) modality of exhibition (daily, weekly, or the release of the entire season at once)

Buscando a Frida is a telenovela with 84 episodes, 45 minutes each, which was broadcast on a daily modality Monday to Friday in primetime. As a telenovela, this fiction follows the same narrative continuity that characterizes serials (Buonnano, 2003) consistent in a story that is told, step by step, in a progressive fashion in every new telenovela episode. In correspondence with the telenovela format, the dramatic arch which started in the first episode, and found its resolution at the end, in the final episode. The number of episodes allows, as part of the narrative strategy, the use of redundancy and the exploration of different subplots within the story. The 45 minutes duration of every episode of this telenovela reflects the broadcasting time that needs to be freed for the insertion of commercial spots, within a one-hour time slot, which is the central element in the business model of broadcasting television. *Buscando a Frida* was broadcast in the 10 pm time slot, which is primetime, for this reason the narrative strategy will look to reach the largest possible audience.

¿*Quién Mató a Sara?* is a series with ten episodes in its first season and eight episodes in the second season. Although this series follows the continuity of a serial format, in each episode a very subtle sensation of certain plot resolution is produced, anchored in the way a particular “theme” is told in each episode. This very subtle episodic characteristic remind of the specific narrative structure of series. At the same time in the best tradition of the series genre, at the end of the season there is no end, but a point in which other narrative options are open, which would allow continuing the story in upcoming seasons. In the final episode of each season, there is no resolution, but the revelation of a new narrative route to explore, with the inclusion of new information, new characters, new unexpected events. The duration of each episode oscillates between 34 to 44 minutes. The whole season was launched by Netflix at once on March 24, 2021. The audience has access to any episode, and can watch them as they please, one by one a day or a week, or binge-watch all of them together on a weekend. So, the flexibility in the duration of each episode and time of access to the content are not connected to the advertising dynamics of broadcasting television, but they are tight to the narrative needs linked to the unique modality in which the plot is developed in each episode.

Narrative characteristics:

- 6) dramatic arch with end/conclusion, or inconclusive to continue in seasons
- 7) subplots: subthemes, secondary characters and tertiary characters
- 8) narrative strategies (analepsis or flashbacks, prolepsis or flash-forward, redundancy, cliffhanger)
- 9) complex narrative strategies (analepsis or flashbacks, prolepsis or flashforward, fantastic sequences, different narrative perspectives, different voice narrators)

Telenovela: *Buscando a Frida*

Following the telenovela format, in *Buscando a Frida*, the plot has a starting point, a development and a resolution. It is so that when the telenovela ends, we will know who kidnaped and killed Frida. The responsible will be punished and they will pay for these crimes, and the just and good characters will be rewarded. As in every classic melodrama, the telenovela, which in the context of Frida's disappearing and dead, love surges and the forbidden became central elements in the story, as the narrative of the telenovela progress secrets will be revealed, hidden romantic relations and details that will allow to recognize who were the responsible of Frida's disappearance and how it happened.

The thriller observes the narrative formula in which the story is told following the reconstruction of the facts and circumstances surrounding Frida's disappearance, which are revealed in the context of the police findings in its criminal investigation. Before the systemic delay of the revelation of the responsible for Frida's disappearance and consequent death, which happens along the 84 chapters, the fiction opens an ample space to explore a whole variety of subplots in relation to the personal, labor, family, and love relations surrounding the Ponce family and their close collaborators. Many of these subplots, in some cases, seem to display the central plot in terms of their intensity, which are created with a shorter narrative arch as subordinated plots. As it happens in classic melodrama, love takes center stage in all its expressions, such as forbidden relations, and becomes the central element and the development engine in the most appealing subplots within the narrative.

In the domain of narrative strategies, telenovelas follow a common scheme as serial storytelling, in each chapter, there is the use of analepsis/flashback, which is a short summary of what happened in the last telenovela chapter. This analepsis start after the advertising spots that followed the last program in the schedule. This means that the telenovela does not start with an institutional entry, but from the very first second it looks for the audience coming from the last program to get hooked and immersed in the intensity of plot, with the main goal to prevent them from changing the channel. At the same time, each episode ends with a cliffhanger, in a moment of suspense, which triggers the need of the audience to commit themselves to knowing what is going to happen, and as a result to assist to their everyday "date" with this televisual serial. But also, within the structure of the story, in each chapter, there are small cliffhangers strategically located which allows the insertion of advertising spots, and they are also used as a hook to prevent the audience changing the channel during commercials. Also, there is a common strategy in Telemundo's primetime: the use of prolepsis at the end of every chapter, with selected information that anticipates the audiences what will happen in the next chapter, creating curiosity and expectations about what is next in the plot.

In relation to the deployment of complex narrative strategies, in *Buscando a Frida* there is a constant use of the flashback as an element of reconstruction of the facts of what seems the one and only reality, as part of an almost forensic recount of the facts from the past, but not as a condition to alter the way the events occur in present time in this story. There is no recount of the past from different perspectives, the use of flashbacks has as the main goal to give you small pockets of information about the identity and action of the participants in those moments in the past. At the core of this control of information about the past rests the strategy to disguise information about the perpetrators of the kidnapping and the crime. Slowly through the development of the story, the same crime scene from the past, or even from the present, will reveal more information, until finally in the last revisiting of the scene in the story -mostly through flashbacks- will show the identity of the criminals.

The police melodrama *Buscando a Frida* is nurtured with the *noir* aesthetics, with a gray and pessimistic view of the world in relation to the story that is being told. In this context, this telenovela shows how imperfect the human condition is, through the count of the many defects of the characters and their human and moral failings. But in the process, what this telenovela achieves is the picture of a universe of characters lacking any virtue, without any appeal, with gray and lonely lives, only embellished by the appearances of their social status. Is important to underscore that in spite of not reaching a spot in the ten most watched fictions of the year, in fact *Buscando a Frida* was Telemundo's most watched fiction in 2021.

Series: *¿Quién Mató a Sara?*

In *¿Quién Mató a Sara?* there is no resolution at the end of the season. While the series plot has as central axis: Alex's revenge and the search for the real assassin of Sara, the story is nurture with a key melodrama element: love, desire and secret, through a constellation of subplots of forbidden love relations, whose are secrets or repudiated in the context of a patriarchal, and *machista* environment embodied by César Lazcano, the family patriarch. In this series there is no single relationship in the context of friendship, courtship, engagement, marriage, or even in the context of the work environment, who has not at the bottom a dark secret, a lie, a betrayal or even a condition of convenience. It is so that in the process of the continuous disclosures about what really happened to Sara, the story reveals the moral poverty in which these characters have grown, and the one they continue inhabiting, particularly in the context of the social class relations of a wealthy family which has made a fortune in the business of casinos.

The series does not use analepsis at the beginning of each episode. But on some occasions, it makes a narrative connection between the last scene of the last episode and the new one. What looks like redundancy is at the center of the narrative strategy of *¿Quién Mató a Sara?* The whole series is based on the exercise of revisiting

the past, again and again, in the very moment of Sara's death or the circumstances of it, in every one of the episodes of this series. Each episode ends with a dramatic intensity, which is the way in which seriality is constructed to ensure the appeal for the next episode. But these moments of dramatic intensity are not always deployed as cliffhangers, otherwise in many cases they seem to present, in a very subtle way, the function of a veiled resolution. In each episode there is no institutional entry at the beginning, it is delay for a couple of minutes to ensure that the audiences get hooked by the plot, and in this way to consolidate the modality of consumption now known as binge-watching, because maintaining the audience glued to the screen, to the next episode is central to this strategy.

As part of the strategies in the context of complex narratives in *¿Quién Mató a Sara?* the reproduction of the past is what drives the plot. In the series, one of the complex narrative elements is not only the way they manage the temporality of the story, going back and forth between the past and the present as the engine of the storytelling style, but the way in which this temporality is constructed every time. For this purpose, they will use different strategies, such as flashbacks in the different modalities, through memories, dreams, sounds, hallucinations, but also in the way of videos, screen images, photographs, and written diaries. The diversity of resources is an element linked to the variety of characters that remember, dream, hallucinate, hear, or watch videotapes. Which means that the past is reconstructed through different perspectives. All these flashbacks return to the same scenes or sequences, again and again, but only with the purpose to provide to the viewer more information, new details about what we know, new angles, new points of view, but in many cases from the knowledge that a different character possesses. A very interesting operation is that there are moments in a memory or a flashback presented from a particular character, ends with a visual deployment and memory of a different character. In this complex weave of reconstructions from the past, the use of audio, what is heard is outside the visual scape, and provides clues about which character is in this precise moment of the flashback is in charge of this dynamic memory, and how this memory transitions to another character in the process of remembering.

At the end of the first season, Alex finds Sara's diary, and it will suggest that Sara was not what we have been thinking all along. The second season was released only two months after the first one, creating new enigmas due to the adding of new characters, some of them had been inserted already in the first season in the background in different flashbacks, now they take center stage and that will allow them to tell a quite different story about who actually Sara is. The series' successful narrative strategy, not only gave to *¿Quién Mató a Sara?* an important position as one of the Netflix's most watched fictions globally, but also triggered the authorization of a third season to be released in 2022.

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