

OBITEL 2023

Independent production companies and the internationalization of television fiction production in Ibero-America

General Coordinators: Maria Immacolata Vassallo de Lopes, Juan Piñón,
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Coordinator of this edition: Rosario Sánchez Vilela, Mónica Kirchheimer



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IBERO-AMERICAN OBSERVATORY OF TELEVISION FICTION

OBITEL 2023

INDEPENDENT PRODUCTION COMPANIES AND
THE INTERNATIONALIZATION OF TELEVISION FICTION
PRODUCTION IN IBERO-AMERICA

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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, reception and sociocultural repercussion of television fiction in Latin America and the Iberian Peninsula, through publications and seminars.

In 2023, the 17th Obitel Yearbook is published, resulting from an editorial effort funded entirely by the team of researchers who are part of Obitel. Its publication is in digital format in three languages: Portuguese/Spanish and English.

Its predecessors are:

1. Obitel Yearbook 2007: Cultures and markets of Ibero-American television fiction.
2. Obitel Yearbook 2008: Global markets, local stories.
3. Obitel Yearbook 2009: Television fiction in Ibero-America: narratives, formats and advertising.
4. Obitel Yearbook 2010: Convergences and transmediation of the television fiction.
6. Obitel Yearbook 2011: Quality in television fiction and audience's transmedia interactions.
7. Obitel Yearbook 2012: Transnationalization of television fiction in Ibero-American countries.
8. Obitel Yearbook 2013: Social memory and television fiction in Ibero-American countries.
9. Obitel Yearbook 2014: Transmedia production strategies in television fiction.
10. Obitel Yearbook 2015: Gender relations in television fiction.
11. Obitel Yearbook 2016: (Re)invention of TV fiction genres and formats.
12. Obitel Yearbook 2017: A decade of television fiction in Ibero- America. Obitel's 10-year analysis (2007-2016).
13. Obitel Yearbook 2018: Ibero-American television fiction on VoD platforms.
14. Obitel Yearbook 2019: Internet television distribution models: actors, technologies, strategies. Coordinator of the edition: Charo Lacalle
15. Obitel Yearbook 2020: Melodrama in times of streaming. Coordinator of the edition: Gabriela Gómez Rodríguez
16. Obitel Yearbook 2021: Ibero-American television fiction in times of pandemic. Coordinator of the edition: Morella Alvarado.

17. Obitel Yearbook 2022: Transformations in the Seriality of Ibero-American Television Fiction in Times of Streaming

Since the 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 match 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 performs not only the quantitative register of the production of fiction programs in the countries belonging to the network, but also the analysis of trends in programming, Open TV reception and analysis of transmedia reception of television fiction. Over these 18 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 the 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, 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, Uruguay), Nielsen Ibope Mexico (Mexico), GfK / Caem e Marktest (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.

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Research team: Morella Alvarado, Pedro De Mendonca, Verónica Fuenmayor, Erick García Aranguren, Martin Hahn (todo el equipo pertenece a la Universidad Central de Venezuela).

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 United States of Hispanic population. 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: players, technologies, and strategies. Since then, Video on Demand Services (VOD) have been occupying us more and more due to the importance of the so-called “streaming war”

The methodological activities carried out for this 2023 Yearbook were essentially the following:

- 1) Systematic monitoring of fiction programs broadcast 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 fiction programs broadcast on Pay Television (Pay-TV) 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 2023 Yearbook is “Independent production companies and the internationalization of television fiction production in Ibero-America”.

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, Ecuador, Mexico, 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, Uruguay), Nielsen Ibope Mexico (Mexico), Caem, GfK and Marktest (Portugal), Barlovento Comunicación and Kantar Media (Spain) and Nielsen Media Research (United States). We also worked with the data generated within the research teams using other sources, such as newspaper articles, Internet information, audio and video materials, as well as those resulting from direct contacts with agencies and the production of the audiovisual media of each country.

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

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 2022 is Independent Production Companies and the Internationalization of Television Fiction Production in Ibero-America

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

PART I:
FICTION IN THE IBERO-AMERICAN AREA IN 2022

COMPARATIVE CHAPTER: THE SHIFT TOWARDS INDEPENDENT AUDIOVISUAL PRODUCTION COMPANIES AND PLATFORMS

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This first chapter of the 2023 yearbook of the Ibero-American Observatory of Television Fiction (Obitel) seeks to be a synthesis and transversal look at the contents of the 11 national chapters that compose it, but in no case to substitute its reading. Only through them is it possible to appreciate the particularities of the television fiction phenomenon in each country. However, there are dimensions of the phenomenon that only become visible when viewing the whole.

Each national chapter follows the same structure: a general overview of the audiovisual panorama; a survey of the offer of television fiction of Ibero-American origin broadcast in 2022; an overview of the state of *Video on Demand* (VoD) in the country and the creation of serialized fiction for platforms; an exploration of forms of interactivity and digital appropriation of contents by audiences; one or more topics that each country chooses to highlight; and a topic to be developed transversally by all countries. The theme chosen for this year was: Independent production companies and the internationalization of television fiction production in Ibero-America.

The first three sections of the national chapters are more quantitative in nature, which makes it possible to work on their results in an aggregate and comparative way, seeking to highlight aspects that are not evident when reading an individual chapter. The themes of the other three sections are more qualitative and flexible in the way they are approached in each national chapter, so this comparative chapter seeks to identify those common elements and to highlight, by way of example, some elements that show the uniqueness of the findings in each of the countries.

1. Obitel countries and free-to-air television

In the Obitel area, television systems with different characteristics can be observed. They differ in the number of signals, the level of state participation in their ownership, the degree of progress in the implementation of digital terrestrial television, their fragmentation among the political units in which the territories are organized or the relevance of actors other than free-to-air television, among many other differences. Obitel's basic definition is to study the television fiction of free-to-air television signals of national scope. But to account for different realities requires adapting

the definitions to preserve their meaning. This is the case of the United States, where not all free-to-air television is monitored, but only that specifically aimed at the population of Latin American origin and, consequently, the reference made to the country is to the Hispanic United States (EUH). It is also the case of Spain (ESP), where the volume of high-standard production of the territorial autonomous regions is comparable to that of the nationwide channels, and to disregard them would greatly underestimate the level of fiction production in Spain, so they are also included in the counts in section 2 of this chapter.

Table 1 takes the information from Tables 1 and Figures 1 of each national chapter. In most countries, digital terrestrial television is already in operation, so it is necessary to specify that what is shown, in those cases, are the first signals of each one, which tend to be the generalist ones and where television fiction is hosted. There is also an exception here. In the case of Spain, La2 is the second signal of La1. However, it is a station with its own identity and its existence long before the implementation of digital terrestrial television, so it is treated as if it were a first signal. With these definitions, Table 1 shows the number of private and public signals of national scope available in each country, indicating the audience share of public signals among those shown in the table.

Among the countries where the information is available, the first distinction is the relevance of the public sector in terms of audience levels. Thus, in some countries such as Argentina, Brazil or Uruguay, public signals have a marginal weight. In the case of the Hispanic United States, there is no public television, while in Chile, Spain, and Portugal, TVN, La1 and RTP1, respectively, are competitive players against private television.

Table 1. Free-to-air television channels with national reach in Obitel countries in 2022.

Country	Private	Public	Audience share of public channels among free-to-air TV signals with national reach (%)
Argentina	6	2	5%
Brazil	5	2	2%
Chile	6	1	18%
Colombia	3	2	9%
Ecuador	7	3	s/d
Spain	4	2	24%
U.S. Hispanics	5	0	0%
Mexico	9	4	s/d
Portugal	2	5	27%
Uruguay	3	2	4%
Venezuela	9	13	s/d

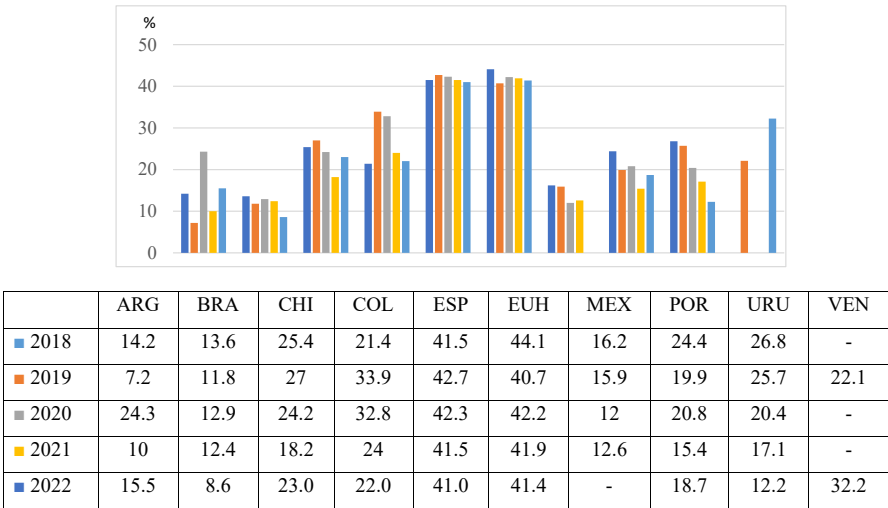
Source: Obitel

Although Table 1 summarizes the above-mentioned aspects, it is insufficient to appreciate the differences in television systems between countries. These contextual elements help to understand the different systems. At one extreme are countries such as Uruguay or Chile, with relatively simple systems. The channels referred to in the table cover the national territory and the weight of local television, when it exists, is minor. At the other extreme is the United States, where Hispanic television is just another piece in a picture dominated by the English-speaking world, and where there are also local television stations, with audiences that are also audiences of the larger system. In all cases, broadcast television coexists not only with pay television, in general declining, but also with a robust offer of *streaming* services that have their greatest strength in fiction.

Fiction is an important genre in all countries, but it is only one within the set of genres offered by broadcast television. The importance of information is also transversal, although in Venezuela it occupies 50% of screen time. Entertainment, not always with the same name, occupies a very significant amount of time in Argentina, Chile, Spain, the United States, Portugal and Uruguay, while in Brazil, religion is second in airtime, behind information, and in Colombia, sports has a much larger space than in the other countries.

As a way of dimensioning the space occupied by fiction within television programming, Figure 1 shows the proportion of screen time occupied by fiction content in the different countries. In this case, it refers to all forms of fiction: national or foreign, premiere or reruns, live action or animation, television or film. The data are taken from the Figures 2 of the chapters of each country for the last five years.

Figure 1. Fiction airtime share on open television¹



Source Obitel

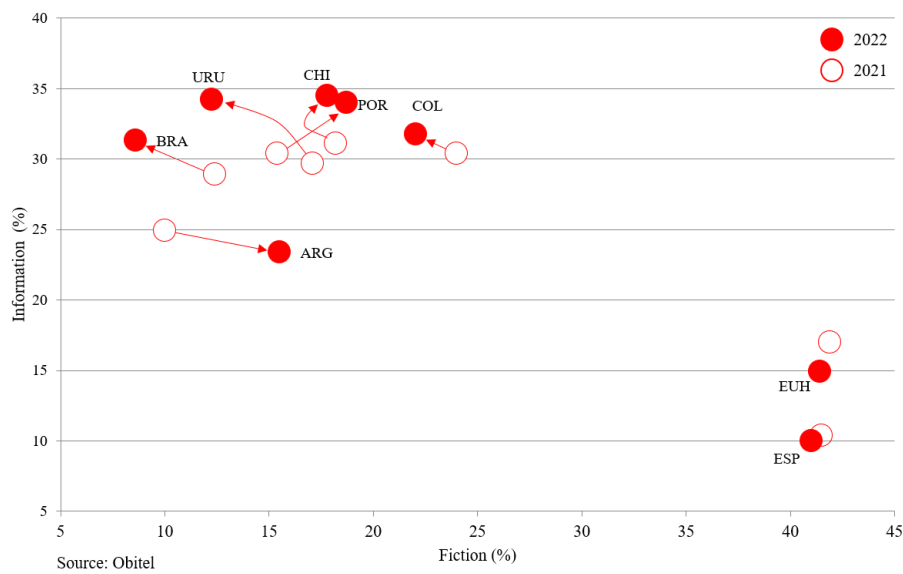
¹ The content classification criteria differ from country to country. For graphs 1 and 2, regroupings were made to make them more comparable. This explains some minor differences that can be seen when comparing these figures with those shown in the respective national chapters.

Visually, the Uruguayan case shows a drop in fiction participation. When analyzing the linear trend of each of the countries in Figure 1 (without considering Argentina and Venezuela, where the data are erratic), a decreasing trend of fiction participation in the programming as a whole is verified in all of them. The linear trend is decreasing in all countries, even if the years 2020 and 2021 are not considered, when many behaviors changed as a result of the pandemic. This decline in fiction is probably attributable both to production costs, in a context in which broadcast television decreases its share in advertising investment, and to the fact that the fiction offer faces strong and consolidated competition from platforms.

Together with the participation of fiction on the screens, Figures 2 of the national chapters also show the participation of other content genres. Among them, information is transversally relevant and one of the most structurally linked to free-to-air television, due to its necessary link with contingency. ²

Figure 2 shows the screen time shares for the last two years for both fiction and news for the countries where this measurement is available for both years.

Figure 2. Fiction content vs informational content in television programming.¹



The Figure 2 shows two groups of countries. On the lower right, the Hispanic United States and Spain, with a high proportion of fiction on the screens and, at the same time, a low proportion of information. In the opposite corner, with a lower share of fiction and a higher share of information, are the rest of the countries. In order to find an explanation for such a marked differentiation, it is probably necessary to

² Classifications differ from country to country. Here, news and other journalistic programs, political programs and documentaries have been grouped under Information, although the volume of the latter is smaller.

look into the characteristics of news programs and the relevance for the audience of the news context other than broadcast television.

Figure 2 also shows the evolution of the relationship between fiction and information between 2021 and 2022. In the Hispanic United States and Spain, what is observed is a slight decline in both content genres. They are the only countries where this occurs. In both Argentina and Portugal, the participation of fiction grows, but while in Argentina this means a setback of information, in Portugal the participation of both genres increases, at the expense of other categories, such as sports and youth. However, the most frequent evolution, verified in Brazil, Chile, Colombia and Uruguay, was a decrease in fiction and an increase in information.

2. Television fiction in Obitel countries

Unlike the previous section, which when referring to fiction does not make any distinction on its type or origin and is based on secondary sources in each country, in the second section of the national chapters there is a survey and classification of premiere television fiction, both national and Ibero-American, exhibited in each of the countries. Television fiction shall be understood as that made for television, that is, excluding that intended for theatrical cinema and also animations. Likewise, the notion of premiere refers to the fact that a title has been exhibited for the first time in the country during that year, regardless of whether it has been previously exhibited in other countries.

Table 2. Supply of hours of national fiction premiere
on free-to-air television (2018-2022). ³

Year	ARG	BRA	CHI	COL	ESP	EUH	MEX	POR	URU	VEN	Total
2018	526	1.299	722	390	1.742	933	1.807	755	16	60	8.250
2019	372	1.307	747	518	1.451	512	1.166	1.029	3	35	7.140
2020	62	416	274	271	1.217	366	906	794	47	3	4.356
2021	104	419	587	953	1.036	420	853	998	13	360	5.743
2022	144	1.297	477	315	912	216	1.333	912	0	240	5.846

Source: Obitel

The table above shows the number of hours of national premiere fiction shown in each country. Using the number of hours, rather than titles or episodes, is better as it is a more representative measure of the productive capacity of the national audio-visual industries.

The production of fiction for broadcast television is usually intended for local consumption and eventual export to other countries, but it is usual for the works to be exhibited first in their country of origin, at least partially, and only then exported.

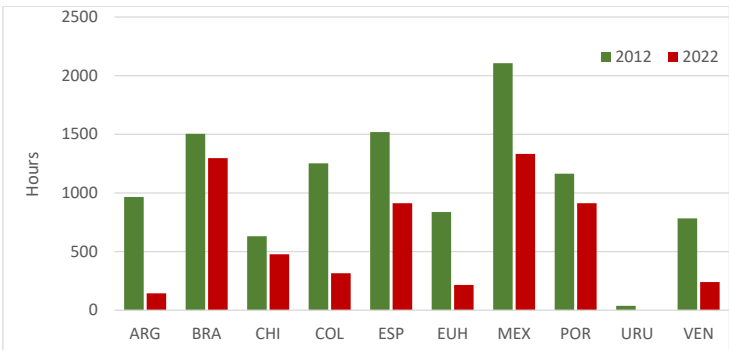
³ In the case of Spain, this includes the productions of both state and regional channels.

For this reason, the exhibition of premiere national fiction is a good approximation of the amount produced.

The previous section showed how fiction (all fiction) followed a declining trend in its share of screen time. Something similar occurs with premiere national television fiction. The linear trend is declining, even if the years 2020 and 2021 are not taken into account.

Probably the most eloquent indicator of the decline in production is that, added together, the same countries produced 54% in 2022 of what they produced in 2012. Figure 3 shows the declines in each country.

Figure 3. National TV fiction premieres in each country: 2012 vs 2022



Source: Obitel

At an aggregate level, production levels in 2012 are similar to those of 2017, but from there begins a decline that worsens during the pandemic, partially recovers in 2021 and falls again in 2022. In addition to the factors already mentioned as some of the possible causes of the drop, the decrease in advertising investment and the shift to platforms, two other factors can be considered that point to substitution: the already consolidated presence of Turkish *telenovelas* and other incipient origins, and also the self-competition from reruns. The gap in the visual quality of the productions from the late 90s onwards, with respect to the current ones, is low. Historical *telenovelas* such as *Terra Nostra*, *Betty la Fea* or *Pasión de Gavilanes* are reprogrammed and are consumed in a similar way to the current ones. A recurring element among the national chapters of this report is to highlight the importance of the repositioning of material already shown.

The exchange of audiovisual content between Ibero-American countries has been present for decades, but there are strong differences in the quantities of productions that each country imports or exports. Likewise, there are also differences in the variety of origins from which content is imported.

The national chapters show the number of titles and hours of Ibero-American premiere television fiction exhibited in the country during 2022. Viewed individu-

ally, they show local consumption. However, when combined, they reveal the flows of production exchanges between countries. This is what is shown in Table 3, using hours as unit of measurement.

Table 3 can be read vertically and horizontally. Read vertically, it shows the origin of premiere television fiction exhibited in each country. Horizontally, it shows the different countries in which television fiction originated in a country was exhibited.⁴ Therefore, the horizontal sum, in the 2022 column, is a measure of the premiere fiction exported by each country during that year. For comparison purposes, the totals of the two previous years are added.

Table 3. Ibero-American fiction premieres shown in each country in 2022

Country of origin	Country in which it is broadcasted											Total exported ⁵		
	Hours	ARG	BRA	CHI	COL	ESP	EUH	MEX	POR	URU	VEN	2022	2021	2020
	ARG	144	-	13	-	-	-	-	-	-	-	13	68	86
	BRA	136	1.297	507	-	-	-	202	345	494	361	2.046	1.242	1.705
	CHI	-	-	477	-	-	-	-	3	99	-	102	195	37
	COL	342	-	-	315	-	27	73	-	-	283	726	1.719	288
	ESP	-	-	4	-	912	-	-	-	33	-	36	8	32
	EUH	314	5	-	-	47	216	7	-	-	-	373	715	288
	MEX	35	259	308	128	192	1.394	1.333	-	144	885	3.346	2.999	2.013
	POR	-	49	-	-	-	-	-	912	-	-	49	75	141
	URU	-	-	-	-	-	-	-	-	-	-	-	-	-
	VEN	-	-	-	-	-	-	-	-	-	240	-	68	-
Total broadcasted		972	1.610	1.309	443	1.151	1.638	1.615	1.260	770	1.769			

Source: Obitel

The content exported to the different countries was not necessarily produced in the same year, but since it is only counted once in each place where it is exhibited, the sum of them is a good measure of a country’s exports of original content.⁶

Table 3 shows that the main exporter of television fiction in Ibero-America is Mexico, as in previous years. In 2022, it sold content to all countries except Portugal, being also, with the exception of the Southern Cone, the main exporter to each of

⁴ Two considerations in the construction of table 3. Given the definition of premiere used, what is a premiere in one country is not necessarily a premiere in others. If an old title, already seen in other countries, is shown for the first time in one country, it is a premiere in that country. The important thing is that it is counted only once for each country, so there is no duplication over time.

The hours of the co-productions - the amount is minimal - are distributed vertically among the countries involved, unless the country in which it is exhibited participates, to maintain consistency with the national chapter tables. This may cause duplications in the horizontal sum, but the number is marginal.

⁵ Totals for previous years include only the countries included in this table.

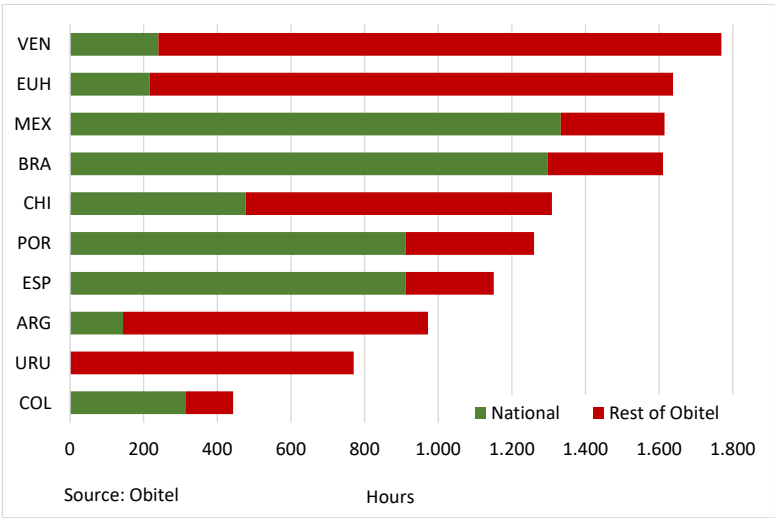
⁶ It does not include, therefore, exports of second or additional exhibitions.

the countries in the region. In second place, both in terms of volume and number of countries to which it exported, is Brazil. A striking case is Colombia: not only did it reduce its exports by almost 60%, but its production fell by 53%, mainly due to the reduction in the production of *telenovelas*.

The cases of Spain and Portugal are interesting in 2022 for the same reason as they were in 2021. Their production volume places them only below Brazil or Mexico and well above all other countries. The invoice of their realizations is of high standard. However, their export levels do not reach 5% of what they produce.

Figure 4 takes from Table 3 the own production and imports in each country. The purpose of this is to represent the level of consumption of premiere Ibero-American fiction and the degree of autarky to satisfy those consumptions.

Figure 4. Ibero-American fiction premieres broadcasted during 2022



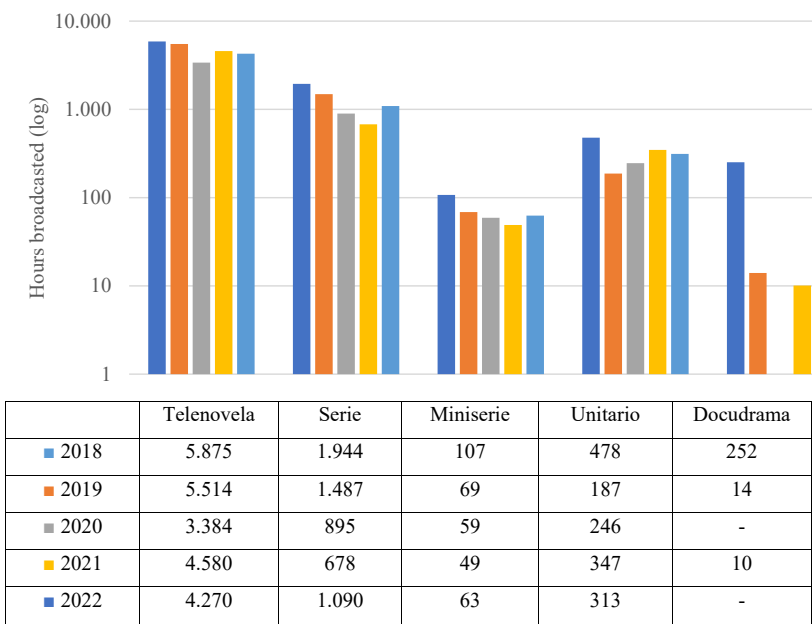
Venezuela and the Hispanic United States appear as the largest consumers of first-run television fiction, depending in more than 85% on imported contents to satisfy this consumption. With a consumption of first-run television fiction similar to that of the Hispanic United States appear Mexico and Brazil, but with the origins reversed: more than 80% of their consumption is satisfied with their own fiction. In this figure, Mexico and Brazil are shown as large consumers of premiere Ibero-American television fiction. However, in Figure 1, at the beginning of the chapter, they were the countries with the lowest proportion of (general) fiction on their screens. It would seem, then, that the fiction they privilege is their own and premiere fiction, but that the interest in the rest of fiction is lower.

Up to this point, the focus has been on television fiction as a whole, without making distinctions among formats. Figure 5 shows the evolution of the presence of the main television fiction formats. For this purpose, it uses the sum of the hours of

national fiction exhibited in its own countries, taking the information from tables 3 of the national chapters.⁷

It should be noted that the vertical axis of Figure 5 is on a logarithmic scale in order to see trends in different formats whose number of hours of exhibition may be 50 or 100 times more than those of other formats.

Figure 5. Hours of national fiction premiere in the
Obitel scope according to format in 2022.⁸



Source: Obitel

Of the five formats shown, the docudrama seems to be one on the verge of extinction. Even those 10 hours that appear in 2021 correspond to an almost scatological exercise. It was a new season of a Chilean docudrama, very successful in the early 2000s, but which had stopped airing in 2009.

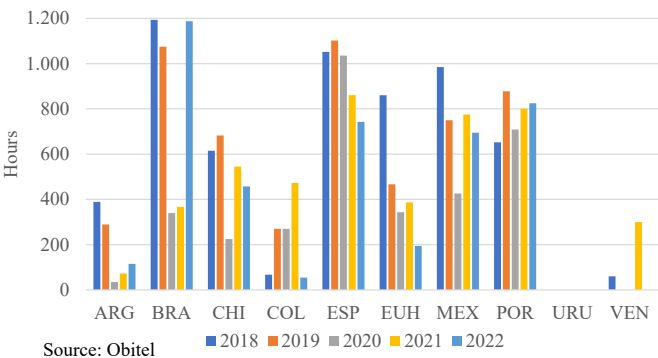
The *telenovela*, although it is by far the dominant format, evidences a clearly declining trend. As for *unitarios*, little can be said because there does not seem to be a clear trend. However, in series and miniseries there seems to be a possible change in behavior. Without the 2022 data, the judgment would have been similar to that of *telenovela*, but 2022, with the growth of these formats, opens the possibility of a change in trend.

⁷ The formats shown, in addition to being those with the greatest presence, are accounted for in the same way in the national chapters. Sitcoms and telefilms are not always treated in the same way. For the purposes of this comparative chapter, the *telenovela* and European serial formats have been homologated.

⁸ For the five years considered, the countries included in Figure 5 are Argentina, Brazil, Chile, Colombia, Spain, USA Hispanics, Mexico, Portugal, Uruguay and Venezuela.

When opening the *telenovela* data by country, Figure 6, what as an aggregate is a clear trend with a smooth curve, is shown here to be random and with abrupt changes. However, two movements are clear and consistent. While in Spain the *telenovela* (or serial) decreases, in Portugal it grows. Between two of Obitel’s most similar countries, the trends seem to be completely opposite.

Figure 6. Showing hours of premiere national *telenovelas* in each country



3. VoD Monitoring

Until not many years ago, Ibero-American serialized fiction premiered almost exclusively on broadcast television, with a few exceptions on cable television. However, since Netflix launched *Club de Cuervos*, its first original series produced in Spanish, in 2015, the scenario has changed significantly. It is no longer just a matter of changes in the way fiction is consumed and the changes in the forms of narration that this could bring about, but of shifts in what, how and where it is produced. The *telenovela*, the type of format that generates more hours of production per title, continues to be hosted mainly in broadcast television. However, measured as the number of premiere titles, this yearbook reports 146 titles on broadcast television and 175 on *streaming* platforms, 14 of them as co-productions between different countries in the region.

Historically, except for productions led by Telemundo or Univision, which targeted the Latin market in the United States, the co-production of television fiction between Ibero-American countries was a rare phenomenon. The flows of productions between countries were due to productions intended for domestic markets that were then put into circulation. Production for *streaming* platforms does not replace, but expands the model by providing space for simultaneous exhibition in the different countries covered by the platform. In the 14 co-production titles shown in Table 5, the number of participating countries is, on average, 2.6, always with Brazil, Spain or Mexico present.

Cross-country co-production is only seen in platforms that have a significant presence in multiple countries, such as Netflix or Prime Video. But not all global platforms follow this model. Disney+ and HBO Max, which have productions in multiple countries, have them only with one country at a time. Among the platforms with multinational presence, the one that departs in its behavior is Movistar: with nine titles in 2022, all of them were produced in Spain.

Table 5 is a synthesis of the tables 8 of the national chapters, which list the productions of each country, refined by cross-referencing the reported co-productions, in order to eliminate duplications. The criterion for inclusion of titles in tables 8 is that the season (if more than one) has released episodes during 2022. In the case of productions shown both on broadcast television and on a *streaming platform*, they are considered premieres in both windows if the distance between the premieres is less than one year.

A slight transgression of the standard criteria for attributing a production to a country should be noted. Considering that the principal production house is usually the *streaming* platform and that many of them are of North American origin, all the productions of Netflix, Prime Video, HBO Max and others are strictly speaking North American productions, but considering them as such would make the production capacities of the countries invisible. In the construction of Table 5, the country of origin of the audiovisual production companies involved in the production has been considered, but not the platform. In the case of the Hispanic United States, in order not to include all the production of the platforms, a production is considered as a national production if their target audience is the Latino audience in the United States.

Table 5. Number of serialized fiction titles released by each country on platforms during 2022. Co-productions that include the country are in parentheses.

Platform	ARG	BRA	CHI	COL	ESP	EUH*	MEX	POR	URU	VEN	Total ⁹
Netflix	3 (2)	8 (5)	2	4 (2)	16 (3)	(3)	12 (6)				45 (8)
Play Balloon		34									34
Prime Video	4 (2)	1 (1)	1 (2)	3 (1)	6 (2)	(1)	4	(1)			19 (4)
HBO Max	1	2			2	1	3				9
Movistar					9						9
Star+	5 (1)	2 (1)		(1)			(1)				7 (1)
Atresplayer					7						7
Disney+	1	1			1		2				5
OPTO								5			5
Vix+							4				4
RTP Play								4			4
RTVC Play				2							2
Lionsgate+			(1)		1 (1)						1 (1)
Apple TV					1	1					2
Of course							2				2
TNT					2						2
PlayZ					1						1
Paramount		1									1
Hulu						1					1
Peacock						1					1
Total	14 (6)	49 (7)	3 (3)	9 (4)	46 (6)	4 (4)	27 (7)	9 (1)	0 (0)	0 (0)	161 (14)

Source: Obitel

As a number of first-run titles, 2022 represents a 22% growth over 2021.⁹ But a more significant change can be seen in the number of co-productions. In 2021 there were only two co-productions, both between Spain and Portugal, while in 2022 this number reached 14, involving eight countries, which seems to reflect a change in the strategy of some platforms.

Viewed by country, Table 5 shows that the country with the largest number of titles is Brazil, with 56 productions, 49 individual and 7 as co-producers. This is followed by Spain and Mexico, with 52 and 34 respectively. Two countries appear without any productions for platforms. One is Uruguay, which in 2022 did not premiere fiction titles on free-to-air television either, and Venezuela, which had only one title on free-to-air television. However, the case of Uruguay shows a peculiarity. Although there are no titles whose production can be attributed to Uruguay, there were at least three series that were shot in its territory and using local professionals. These were productions of foreign production companies that found technical or economic advantages to film there.

In the case of the platforms, the growth in the number of Netflix titles was explosive In the case of the platforms, the growth in the number of Netflix titles was

⁹For comparative purposes, in 2021 we are discounting production from Peru, which is not included in this yearbook, but was included in the previous one.

explosive. It went from 28 titles in 2021 to 53 in 2022, well ahead of the second platform with the most titles released in 2022. With 34 titles, Globo Play even increased the 33 titles that placed it comfortably in first place the previous year and increased its distance from Prime Video, which fell from 29 titles in 2021 to 23 in 2022. Regarding Globo Play, a fact that should not be omitted is that all its production is made in a single country and that only at the end of 2021 it became available from Portugal, the only country with which it shares a language in the region.

4. Fiction, interactivity and audience participation

The study of audience interaction and participation with fiction content is essential to understand the dynamics of production and reception. In an era of overabundance of supply, the channel or platform uses communication strategies before, during and even after broadcasting/availability, in order to extend the life of products and monetise them. In recent years, the online environment has come to the fore in this task, especially with the use of digital social networks and transmedia experiences that combine online and offline.

The production and reception contexts in OBITEL countries are different, so while there are very dynamic markets, there are others that use digital only as a way to make their presence felt, without a clear investment in building engagement and, consequently, in creating consumer communities. Uruguay was such a case: with no national premieres, the country chose, as an example, the imported telenovela *Si nos Dejan*. The presence in digital social networks was limited to a propagation strategy with anticipatory and catch-up content, which resulted in very little social interaction. In the case of Venezuela, due to political instability and constant power and internet outages, audience interaction and participation with television content is very limited. In addition, channels encourage engagement with national content and not with foreign content, so, having premiered only one (1) national title in 2022, the results are very unimpressive. Instagram and Twitter are the most used platforms and the data shows that most of the comments on (foreign) fiction were not about the content itself, but about the suspension of telenovelas for the World Cup broadcast.

Although Argentina has national productions, during the year there were few premieres and minimal interaction in the official commentary spaces (Facebook, YouTube, Twitter and the channels' official sites). *El Primero de Nosotros* (Telefe) was the plot chosen to illustrate audience participation in the digital space, especially because it gave rise to the celebration of the love encounter that had not occurred in *Chiquititas* in 2006. This led fans, now adults, to post photos from then and now, as well as to comment on the relationship between the characters played by the actress and the actor in the two productions.

Brazil has been very active in using digital social media to engage audiences. In 2022, TV Globo's remake of *Pantanal* - a 1990 telenovela by TV Manchete - also generated a lot of activity from the fan community. The media group planned a communication campaign well in advance, not only on the networks, but also in other programmes (news and entertainment), capitalising on cross-promotion and enabling continuous engagement with the content. Beyond private use, WhatsApp in Brazil has already acquired the status of a public network and, in the case of *Pantanal*, led to the creation of stickers of the characters' facial expressions, which were widely shared. Once again, the serious issues addressed in fiction, such as identity representation and human rights, have gained space on the networks, encouraging internet users to tell their experiences and thus enabling public debate.

The strategy of "going back to the past", appealing to the audience's nostalgia, was also seen in the Hispanic United States. Telemundo announced the 2nd season of the telenovela *Pasión de Gavilanes* (the 1st season aired in the early 21st century), involving the original cast with young actors; scheduling a rerun of the telenovela; creating an app; giving a space on the institutional website and feeding digital social networks. The impact and interaction prior to the premiere was more interesting than afterwards, which led the channel to reduce the number of episodes planned (from 90 to 73). Anticipation as a way to generate curiosity and early engagement with the content was also a strategy in Chile. The Mega channel used the different digital platforms to show behind-the-scenes images, interviews with the cast, technical meetings and locations that led, in the case of *La Ley de Baltazar*, to the small town of Cochamó becoming a tourist attraction. In this case, and unlike in the Hispanic United States, the number of followers was compatible with the rating, in a clear demonstration of the role of digital social networks, not only for dissemination, but also for loyalty and continuous participation.

Mexico and Portugal chose similar examples of a strategy to promote audience participation through digital channels, based on content innovation/disruption and autonomous dissemination of songs and soundtracks. *Papás por Encargo*, an original Disney+ production in Mexico, used networks to generate public debate on updated visions of the family; some of the most emblematic songs from the soundtrack were simultaneously released on Spotify and video clips circulated, with great interaction on YouTube. The Mexican chapter also referenced the *María Félix miniseries*, *La Doña*: a Vix+ production, a platform originated by the TelevisivaUnivisión merger. The highlight was, in addition to the use of networks such as Twitter, the subsequent premiere on a FTA channel, an extra possibility that international streaming platforms do not have and that allows capitalising on local content.

In the case of Portugal, the series *Pôr-do-Sol* (RTP) stood out. Using humour, the public service channel, which does not broadcast telenovelas by editorial choice, presented a parody of the format. This innovation/disruption generated a great deal

of interaction on digital social networks, especially Twitter, and the subsequent release on Netflix (as licensed content), led to the series becoming a cult series, with two seasons and, already in 2023, a feature film released in the cinema. In addition, there were other unusual initiatives in Portugal that encouraged social participation, such as the live broadcast in nine movie theatres of the last episode of season 1 and the participation of the cast and creative team in ComiCon Portugal 2022. As happened in Mexico and as has already happened in many markets, the musical group created in the series, *Jesús Quisto*, left the small screen, filled concert halls and one of the themes was adapted into an anthem in support of the national football team, in the context of the 2022 World Cup. This transmedia path, which combines digital and analogue strategies for dissemination and interaction, has also been followed by Colombia and Spain.

Colombia identified several titles to show the interactivity strategies used by channels and platforms, but placed special emphasis on *Arelys Henao: Canto para no Llorar* (Caracol Televisión) and *Nación Rebelde* (RTVC and Señal Colombia). The former, a biographical telenovela, was later premiered on Netflix and had great activity on the networks, especially through the protagonist who used the digital medium to echo the issues addressed, such as feminicide, machismo and violence. At the same time, numerous concerts and events were held with the presence of the actress, creating fan communities with their own networks and interactions. The second title, in addition to a website with additional clips and profiles on digital social networks, gave rise to a series of podcasts and a documentary editorial project, made available free of charge.

Spain has been one of the most active markets in the construction of transmedia universes, with the offer of microsites dedicated to each fiction, videogames, special episodes in virtual reality and immersive and gamified experiences. In 2022, there was some disinvestment, particularly due to the fast-moving nature of consumer goods and the normalisation of binge watching that transform consumption into less committed, but two titles were still identified (Atresmedia): *Historias de Protegidos* and *La Edad de la Ira*. The first title was accompanied by the launch of a virtual escapism game and a podcast and the second title by a weekly podcast with 12 teenagers aged between 14 and 17 who share experiences and reflections on issues of concern to their generation, an interactive map and a mockumentary, performed by the cast of the series and expanding on the story of a character.

5. Highlights of the year

The World Cup, non-fiction genres, remakes, some disinvestment in fiction and the consequent increase in imports marked the year for free-to-air TV channels in many OBITEL countries. This was the case in Argentina, with TV Pública reaping high ratings thanks to live football matches and a new edition of *Gran Hermano* and

all the generated satellite programmes dominating programming grids. The same happened in Uruguay, where news services even included moments dedicated to entertainment formats and spin-off programmes emerged that continue and develop the narratives, causing a standardisation effect on screens around the world and emphasising the idea of transnational television.

The US Hispanic United States also pointed to the World Cup as the television event of the year, which allowed the rights-holding networks to reach audience figures far higher than those currently achieved by free-to-air television. The creation of the Vix+ platform, the result of the Televisa-Univisión merger, was also highlighted, as was by Mexico. Both countries highlight the investment in original productions, as well as the expansion of the catalogue with content from other entertainment and sports companies, which enables 60% of viewers (Mexico and the United States) to be covered. Mexico also highlights the Netflix premiere of *Donde Hubo Fuego*, an original creation about the city's fire service that became the first telenovela among the most watched titles in streaming in the country and in other markets. They also draw attention to the penetration and uptake of Turkish content. As the OBITEL yearbooks have attested year after year, Turkish productions have been gaining a strong following in the Ibero-American space with their narratives. There seems to be a consensus in the tendency of these productions to recover the melodramatic roots of the format, presenting telenovelas very similar to the traditional telenovelas of the 1980s, in contrast to contemporary telenovelas, markedly inspired and contaminated by genres of other formats of global reach and taste.

The Hispanic United States also uses nostalgia through the remake for prime time. So does Brazil with the case of *Pantanal*. To promote this telenovela, TV Globo developed the biggest campaign in history, even presenting the first episode inside the *Big Brother Brazil* house, using immersive sound and 8K technology. Many of the themes were updated and developed, allowing for a broad and informed public debate, constituting, as noted, a true media event. The remake was also identified by Colombia as one of the highlights of the year, allowing, as in Brazil, updated plots and themes, and offering the possibility for viewers to watch the two versions, programmed consecutively. Also highlighted in the Colombian report is the recurrent use of biography (telenovelas and series) and music as a central theme, allowing the extrapolation of the screen with the offer of music videos on the platforms and live shows.

Chile marks the return of Asian fiction (South Korea) as the highlight of the year. If these contents were previously hosted on streaming and web platforms and aimed at niche audiences, in 2022 they became part of the offer of public broadcaster TVN (Televisión Nacional de Chile) and private broadcaster Canal 13. This resurgence also resulted in the support and broadcasting of a K-Pop music festival, as well as the prime time programming of the Oscar-winning Korean

film *Parasitos*. This dynamism of international fiction is also cited by Spain as a reason for disinvestment in national production. The decline in supply and demand has led to debate about the sustainability of the national production industry for free-to-air channels in the face of the proliferation of titles on the platforms, many of them Spanish, and new forms of consumption. Venezuela also reports a decrease in investment in fiction production, in particular due to the country's multifactorial crisis, but also to the fact that audiences are now opting for content offered by streaming platforms. However, Venezuela considers that three strategies prevailed in 2022: i) the presence of fiction supported by public funds; ii) the production of alternative serialised fiction (e.g. webseries) and iii) fiction produced by the margins.

Spain, however, refers to some state television productions in 2022, namely the series *Cuéntame Como Pasó* (La1), now in its 22nd season, and the Spanish-Portuguese series *Séquia* (RTVE). Co-productions are, in fact, the most prominent feature of 2022 for Portugal. This model, which allows for greater financial investment and greater reach in terms of audience, has been widely explored by the national public media service, especially with the region of Galicia. The geographical, cultural and linguistic proximity that has guaranteed productions since the 1990s has allowed the offer of four series in 2022, highlighting the role of RTP in supporting independent production, but also in identifying strategic alliances as a competitive factor in a market saturated with supply.

6. Theme of the year: Independent production companies and the internationalization of television fiction production in Ibero-America

In 2022, OBITEL sought to map the action of independent production companies in different countries, taking into account their size, employment opportunities created by platforms and internationalisation strategies. In general, despite the differences in geographical size and economic potential between countries, there is a homogeneous understanding of what an independent production company is and a common trend towards its evolution, driven by the entry of new players in the market, increased competition, opening to the outside world and the development of regulatory frameworks and local support, favourable to the growth of the market on the global stage, despite the different weaknesses of each country.

Independent production in Argentina is not new. For decades, the country has had a structure in place that is recognised locally and globally, especially through state (film) and private (television) funding. The arrival of streaming platforms has allowed an increase in production, a diversification of themes and a more ambitious distribution, however, several drawbacks have been identified for the operation of independent producers: formats become shorter in duration, not allowing for a sustainable growth of employment; the times and forms of production do not always comply with labour agreements and regulations,

leading companies and professionals to depend on the programming space, pace of production and production cycles imposed by the platforms.

In the last 15 years, Brazil has witnessed important changes in the independent production market, marked by the decentralisation of public calls for entries, the Pay TV Law (12 485/11) and the arrival of new players in the market. These frameworks have allowed for sustainable growth, resulting in a higher volume of works produced by small producers, diversifying the offer and showing the importance of, for example, large platforms. Internationalisation is a hallmark of Brazilian fiction production and already started in the 1970s, however, this more varied ecosystem has enabled the emergence of new business models, allowing for the addition of production values to each work, such as the hiring of global artists, and capitalising on success and recognition beyond borders.

The case of Colombia seems paradoxical: on the one hand, there are few independent production companies with the capacity to produce fiction for free-to-air channels and platforms; on the other hand, there are many small producers who cannot access the big production stage, limiting themselves to the production of institutional videos, videocasts and advertising. Film predominates and state aid does not always cover television productions. There is also a growing tendency to experiment with new formats and techniques.

Chile began producing television fiction continuously from the 1980s onwards and, as a result of market growth and competitive dynamics, the industry has expanded its activities. New schedules for national fiction were created, new dramatic areas were developed in different and innovative genres and formats, and the outsourcing of production to seek new financing grew. This step allowed the consolidation of the practice of using independent production companies to create television fiction, leading to the fact that, today, production companies dedicated to the production of telenovelas are more dependent on the channels and that production companies dedicated to the production of series can have a more diversified set of clients, including streaming platforms.

Since the 1990s, Spain has had a television fiction production industry. Competition and the dependence of small production companies on networks and programmes led to the creation of an oligopsony served by a scattering of micro-producers whose size and capacity made them ephemeral. The advent of OTT (over the top) platforms has changed the system, allowing a greater diversity of work opportunities for more producers, as well as an increase in external co-productions. At the same time, there has been a movement of alliances and mergers between local independent production companies that have consolidated the position of the Spanish industry both internally and externally.

In the case of the Hispanic United States, independent production companies have become a key player in entering local, national and regional markets thanks

to their knowledge of culture and customs. This has allowed the construction of content that is recognised by both the Ibero-American population and the Latino communities within the United States. At the same time, the type of stories and aesthetic approaches have also ensured international and global appeal, successfully circulating the content in many markets. The competitive environment has led to the diversification of indie profiles, as small and medium-sized indies continue to exist, but larger and more responsive companies are also emerging, especially at a time when multiple niche audiences need to be reached.

Mexico has always been a centre of audiovisual production, particularly fiction. For more than a decade, it has been a Latin American production hub, marked by the presence of major transnational brands of North American origin and from other Latin American geographies. The OTT market, through contracting and co-productions, has guaranteed a high flow of work, with a very large financial investment, which has led to an increase in the diversity of narratives, formats and genres.

The incorporation of the Audiovisual Media Services Directive (AVMSD) into national legislation has not yet allowed Portugal to increase work for independent producers. The market is vast, characterised by a multiplicity of companies with very different sizes and capacities and, although the obligation to invest by OTT has already allowed some work to develop, as mentioned above, it has not yet proved to be the hope it promised. The public media service, in articulation with state support, has been responsible for energising the sector, ensuring that more independent production companies can work, and in different formats and genres, contributing positively to the development of the audiovisual sector in Portugal. In addition to commissioning or buying content for broadcast, RTP has opted for co-productions as a privileged production model, both with other foreign producers and with distributors and even international platforms. Thus, internationalisation has been the result of this public service action, which has been followed by initiatives from private channels, especially SIC, given the creation of its own platform with original content (OPTO SIC).

The entry of international streaming platforms in Uruguay has guaranteed some work for independent producers, but these are not original national productions, but content signed by Argentina, Brazil or Chile. In fact, fiction production is decreasing and many of the production companies, although they show that they are also dedicated to this type of productions, do not present a concrete catalogue. The internationalisation movement is marked, above all, by the import of fiction and initiatives to promote own production through the Uruguay Audiovisual programme.

In Venezuela, although the definition of independent producer is identified in the law and regulations, the expected independence has not always been achieved: there has been diversification, but a strategy of control over what to produce, how to produce, when to broadcast and where to broadcast has emerged. At the same

time, Venezuela's multifactorial crisis has not allowed the market to develop, which has led to the fact that by 2022 no independent production company has produced fiction, nor are there dynamics of internationalisation. There is no investment, no strategic vision, which means that the production companies that still exist do not consider it profitable to work in the area.

In 2022, Ecuador rejoined OBITEL, allowing, with some limitations, to present some monitoring results on national television and audiovisual fiction. As for independent production, it is clear that, by legal imposition (Ley Orgánica de Comunicación, 2019), indies are resorted to in order to meet quotas. The promising market in this field has faced the effects of the Sars-Cov-2 pandemic, so state support and some private aid have been essential, as in most markets. Despite this favourable environment, it is noted that the greatest investment by television channels is in the area of information and that there is still a long way to go in the area of professional training (technical and artistic). Furthermore, the country identifies a lack of innovative content creators in line with international trends, as well as a lack of development of the dramatic tradition.

PART II:
FICTION IN OBITEL COUNTRIES IN 2022

ARGENTINA¹: FROM THE SMALL SCREEN TO THE PLATFORMS. THE REBIRTH OF TELEVISION FICTION

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Introduction

2022 was a year dominated by the return of the reality show par excellence: *Big Brother* -since October- and the World Cup. These two events were the most watched and generated an interesting debate about the topics, modes and programs that attract audiences to broadcast television. In addition, only two fictions of national production were released on open television channels, while, as has been reported in previous years, national fictions for streaming platforms release their first chapter in linear television spaces. This premiere works as a sort of caller towards novelties in on-demand viewing spaces. In this scenario, the telenovelas released on open television during the year (*El Primero de Nosotros* and *La 1-5/18 Somos Uno*⁴) did not end up meeting the expectations initially generated.

1. The Audiovisual Context of Argentina in 2022

1.1. Open television in Argentina

Argentina's open television system can be characterized through the main players based in Buenos Aires, which includes six private channels that, through direct ownership of affiliates in different provinces, or commercial agreements with repeaters and the sale of specific content, achieve national coverage despite having licenses that, in most cases, only cover the Buenos Aires Metropolitan Area (this includes the City of Buenos Aires and surrounding urban areas).

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 analyses presented here.

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⁴ *La 1-5/18. Somos Uno* began airing in September 2021 but continued until March 2022.

Box 1. National open television channels in Argentina

Private channels (6)	Public channels (1)
América 2 (channel 2)	TV Pública (channel 7)
El Nueve (channel 9)	
Telefe (channel 11)	
El Trece (channel 13)	
Net TV	
Bravo TV	
TOTAL CHANNELS = 7	

Source: Obitel Argentina

The most consolidated and long-established private commercial channels are Telefe (Paramount, United States), El Trece (Grupo Clarín, Argentina), El Nueve (Grupo Octubre, Argentina) and América (Grupo América, Argentina). Net TV (Grupo Perfil, Argentina) was added in 2018, and Bravo TV (Grupo Olmos and Grupo Crónica, Argentina)⁵ in 2022. The latter still have low brand recognition, low audience levels and a programming that highlights the repositioning of fictions from different Ibero-American countries, generally already aired years before by other open TV channels. TV Pública (Radio y Televisión Argentina Sociedad del Estado) is the first Argentine television channel and the only one with a nationwide license. However, the state broadcaster enjoys a low social significance, marginal audience levels, capture of its editorial line by the governments in office and permanent difficulties to stabilize an identity and artistic-communication project in the long term (Schejtman, Rivero and Becerra, 2021). Channels licensed for open television are also available through Digital Terrestrial Television (known in Argentina under the brand name Televisión Digital Abierta, TDA), with reach within their respective coverage areas⁶.

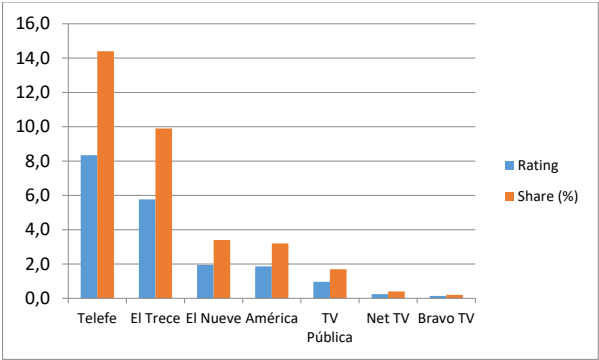
Graph 1. TV rating and share by channel (rating per household).

Channel	Rating household	%	Share (%)
Telefe	8,3	43,3	14,4
El Trece	5,8	29,9	9,9
El Nueve	1,9	10,1	3,4
América	1,9	9,7	3,2
TV Pública	1,0	5,0	1,7
Net TV	0,2	1,2	0,4
Bravo TV	0,1	0,7	0,2
TOTAL	19,3	100,0	33,2

Source: Kantar Ibope Media and Obitel Argentina.

⁵ None of these television channels located in the Autonomous City of Buenos Aires, the nation’s capital city, has national reach. This is achieved through agreements and retransmission agreements with local television stations.

⁶ Information available in April 2023 at <https://www.tda.gob.ar/canales-cobertura.php>.

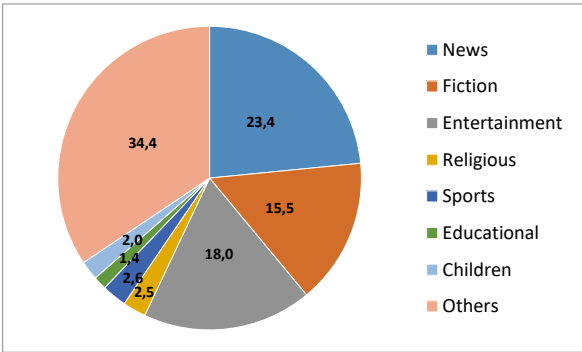


Source: Kantar Ibope Media and Obitel Argentina.

Graph 2: Genres and hours broadcast in TV programming

Broadcast genres	Exhibition hours	%
News	12.966:00	23,4
Fiction	8.592:00	15,5
Entertainment	9.983:00	18,0
Religious	1.374:00	2,5
Sports	1.461:00	2,6
Educational	786:00	1,4
Children	1.125:00	2,0
Others	19.025:00	34,4
TOTAL	55.312:00	100,0

Source: Kantar Ibope Media and Obitel Argentina.



Source: Kantar Ibope Media and Obitel Argentina.

The total number of hours shown by the seven channels observed increased by 11.1% due to the start of the new channel, Bravo TV, as of May 2022. In percentage terms, no significant variations are observed in the participation of each genre in the total hours broadcast with the only exception of fiction, which went from representing 10% of the programming in 2021, with 4,996 hours, to 15.5% of the total, with 8,592 hours broadcast. This jump is mainly explained by the contributions of NetTV and BravoTV, which base most of their programming on

Latin American telenovelas, generally broadcast in previous years on other open television channels, such as *Avenida Brasil*, *La Usurpadora*, *Rosario Tijeras* or *Pedro el Escamoso*. Thus, and paradoxically, as we will see below, the presence of fiction on the open television screen in Argentina grew in 2022, although it is neither national nor premiere fiction.

1.2. Pay TV and VoD platforms in Argentina in 2022

According to data from the Ente Nacional de Comunicaciones (ENaCom) for the third quarter of 2022, 67.2% of Argentine households had some pay TV service. This figure is slightly lower than the 68.7% reported by the state agency for the same period in 2021. Most of the connections were made through a physical link (cable modem and to a lesser extent ADSL), while satellite technology captures a smaller market share of less than 15%. If clandestine connections are added, it is estimated that close to 80% of the country’s households would have access to this service, one of the highest penetration levels in the continent. The pay TV market is strongly concentrated in the hands of the company Personal (controlled by the merged Telecom-Clarín Group), which holds close to 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.

Box 2. Most watched pay TV channels in Argentina 2022

10 most watched pay TV channels in Argentina			
Channel	Genre	Origin	Rating household
TN	News	Argentina	1,9
C5N	News	Argentina	1,2
LN+	News	Argentina	1,1
TyC Sports	Sports	Argentina	0,9
Crónica TV	News	Argentina	0,9
A24	News	Argentina	0,8
ESPN	Sports	United States	0,8
Canal 26	News	Argentina	0,7
Cartoon Network	Children	United States	0,5
Universal TV	Varieties	United States	0,4

Source: Kantar Ibope Media and Obitel Argentina.

The first two places among the most watched pay-TV channels are unchanged with respect to the previous year. TN (Grupo Clarín) and C5N (Grupo Indalo), whose programming is oriented to information, analysis, opinion and political debate, grew in audience and remained as the most watched stations. Likewise, the opinion

channel LN+ went from seventh place the previous year to become the third most watched pay TV channel.

Although 2022 was not an election year, the information, analysis and political opinion channels in general climbed in the audience. This may be due, in part, to the political, economic and social crisis the country is going through, which found a high point in the assassination attempt against the Vice-President of the Nation in September 2022, her prison sentence and lifetime disqualification to hold public office, the replacement of three ministers of Economy in one year and the frequent political tensions within the ruling party and the opposition, together with the general deterioration of the main socioeconomic indicators.

As we have said, pay TV in the country has a penetration close to 80% of households, but pay TV channels, although with exceptions, are not regular producers of serialized fiction content. On the side of global video-on-demand platforms, Netflix was the first player to settle in that market in 2011, which it comfortably dominated until 2020, when the launches of Disney+, Star+, HBO Max, among others, took place. According to data from Havas Media (2022), the video platform market in Argentina is currently led by Netflix (25%), closely followed by Prime Video (22%), Disney+ (13%), HBO Max (10%) and Paramount+ (6%). Since 2018 and increasingly, all these companies, with the sole exception of Paramount+, have ventured into the production of “local” serialized fiction. In 2022, as will be seen below, the set of global platforms released more national serialized fiction shows than the sum of all open television channels.

1.3. Sources of financing for the audiovisual sector

According to the Argentine Chamber of Media Agencies (CAAM, in Spanish), “in the first semester 2022 the media advertising investment market grew 84% in current pesos compared to the same semester 2021, and translated into dollars there is a 52% growth”⁷. In the first six months of the year, television received USD 220,600,000 (41.4% of total investment), a slight increase in absolute terms compared to USD 146,700,000 in the same period of the previous year. Compared to the January-June period of the previous year, the distribution of advertising investment remains stable among the different media, with television (41.4%) and digital media (41.1%) accounting for the largest share. Another important source of income for the media (although it is not clear if it is accounted for in the above CAAM numbers), is the state investment. As reported by the National Media Secretariat, between September 2021 and April 2022 (eight months) the six main open television channels in Buenos Aires received AR\$ 618,730,142.25 (about USD 3,000,000 at the official exchange rate of April 2023), which represents 7.1% of the total invested⁸. To this must be

⁷ Available in April 2023 at <https://www.agenciasdemedios.com.ar/inversiones-publicitarias/>

⁸ Data available at https://www.argentina.gob.ar/sites/default/files/informe_inversion_al_30-5.pdf

added the state advertising that the media receive from different provinces or municipalities, which makes it even more complex to calculate the exact amount of money they receive for this concept⁹.

1.4. Communication policies

The year 2022 was a year of low intensity for communication policies. One of the main regulatory actions of Alberto Fernández's government was the issuance of the Necessity and Urgency Decree 690/2020 in August 2020, which declared ICT services as a public service in the context of the pandemic. That decree gave the National State the power to intervene in the setting of tariffs for some communication services. However, large telecommunications companies, some SMEs and, more recently, all other players providing this type of services, obtained injunctions from the courts against the implementation of this measure, so that its practical effect was very limited.

On the other hand, by the end of 2022 the Ente Nacional de Comunicación advanced with the issuance of a regulation for the implementation of 5G technology in the country¹⁰. However, at the closing of this chapter, the specialized press reported disagreements between the National State's collection claims for the spectrum bidding and what large companies would be willing to effectively invest, so that the bidding documents are not yet known and the deployment of this technology in the country does not appear as a possibility in the short term. In the framework of the transmissions of the Qatar 2022 Men's World Cup, the National Government put in value the transmission infrastructure of the Digital Terrestrial Television system, which had been neglected during the government of Mauricio Macri (2015-2019) and also during the current one, until 2022¹¹.

1.5. 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 128.9% according to ENaCom data for the third quarter of 2022¹². As of September 2022, there were 59.7 million mobile accesses in the country, out of a population of 46 million. However, more than 50% of active mobile lines are prepaid and 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. Regarding broadband to the home, the average penetration at national level reaches 76.6% of the country's households, an increase of almost 6% compared to the same period

⁹ See more at <https://chequeado.com/el-explicador/publicidad-oficial-como-cuanto-y-a-que-medios-reparten-el-dinero-los-gobiernos-porteno-bonaerense-y-santafesino/>

¹⁰ Source: https://www.enacom.gob.ar/institucional/un-paso-decisivo-para-la-llegada-del-5g-a-la-argentina_n4236

¹¹ See more at <https://www.letrap.com.ar/nota/2022-11-7-10-1-0-la-apuesta-mundial-de-la-tv-publica-para-sostener-la-pesada-mochila-de-la-tda>

¹² Data available at <https://indicadores.enacom.gob.ar/Informes>

of 2021. 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 Chaco, Formosa, Corrientes and Santa Cruz, where this figure does not reach 50% of households.

Although the national average speed is 62.5 Mbps (a significant growth compared to 48.5 Mbps in 2021) and access offers at more than 30 Mbps are common, almost 40% of domestic connections are concentrated in the speed range below 30 Mbps, with large variations in the speed available depending on the province.

As for the type of technology, cable modem dominates (54.3%), but fiber-to-the-home connections have grown in recent years to reach 25.8% in 2022. 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, prevent access to the Internet.

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.

2. Analysis of the Year: National and Ibero-American Release Fiction in 2022

TABLE 1. Release fiction productions screened in 2022
(domestic, foreign Obitel and co-productions)

NATIONAL PREVIOUSLY UNRELEASED PRODUCTIONS – 10 Telefe – 1 national production 1. <i>El Primero de Nosotros</i> (telenovela) El Trece – 5 national productions 2. <i>La 1-5/18 Somos Uno</i> (telenovela) 3. <i>El Encargado</i> (miniseries) 4. <i>Los Protectores</i> (miniseries) 5. <i>Robo Mundial</i> (miniseries) 6. <i>Santa Evita</i> (miniseries) El Nueve – 2 national productions 7. <i>El Hincha</i> (miniseries) 8. <i>Supernova</i> (miniseries) TV Pública - 2 productions 9. <i>40 Años</i> (miniseries) 10. <i>Las Polacas</i> (miniseries) América – 0 productions Net TV – 0 productions Bravo TV – 0 productions CO-PRODUCTIONS – 1 TV Pública - 1 production 11. <i>Sumergidos</i> (series, Argentina-Brazil)	IMPORTED PREVIOUSLY UNRELEASED PRODUCTIONS – 6 Telefe - 1 production 1. <i>Club 57 2</i> (miniseries – Hispanic US and Italy) 2. <i>Génesis</i> (telenovela – Brazil) 3. <i>Dulce Ambición</i> (telenovela – Brazil) Net TV- 2 productions 4. <i>El Señor de los Cielos</i> (telenovela – Hispanic US) 5. <i>La Piloto</i> (telenovela – Mexico) Bravo TV – 1 production 6. <i>Enfermeras</i> (telenovela – Colombia) El Trece - 0 El Nueve - 0 productions América – 0 productions TV Pública –0 productions TOTAL PREVIOUSLY UNRELEASED PRODUCTIONS: 17
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Source: Obitel Argentina

The number of domestic and imported unreleased productions remains at 17, as in the previous year, with an increase in the number of Argentine productions from eight in 2021 to ten in 2022. This happens, however, in the midst of the consolidation of a phenomenon that we have already reported in the previous yearbook referred to the use of the linear screen for the premiere of one or two episodes as a “promotional” of series that then become part of the catalogs of different video on demand platforms. This happened in particular this year with the alliance between El Trece and Star+, which allowed the premiere of the first chapters of the series *Robo Mundial*, *El Encargado*, *Los Protectores* and *Santa Evita* on open television. Telefe was the only free-to-air channel to release a daily series in 2022, *El Primero de Nosotros*, since *La 1-5/18 Somos Uno* of El Trece is a continuation of the previous year. TV Pública, which in 2021 had not released any fiction, resumed with the airing of two shows produced in the province of Santa Fe, *40 Abriles* and *Las Polacas*.

TABLE 1b. Reruns exhibition in 2022
(domestic, foreign Obitel productions, and co-productions).

NATIONAL RERUNS– 6	FOREIGN RERUNS – 14
Telefe - 1 national production	Net TV- 3 productions
1. <i>Casados con Hijos</i> (series - Argentina)	7. <i>Betty la Fea</i> (telenovela – Colombia)
El Nueve – 1 national production	8. <i>Imperio</i> (telenovela – Brazil)
2. <i>Ricos y Famosos</i> (telenovela- Argentina)	9. <i>Pedro el Escamoso</i> (telenovela – Colombia)
TV Pública - 4 productions	Bravo TV – 11 productions
3. <i>Artigas</i> (miniseries – Argentina)	10. <i>Avenida Brasil</i> (telenovela – Brazil)
4. <i>En Viaje</i> (miniseries – Argentina)	11. <i>Destilando Amor</i> (telenovela – Mexico)
5. <i>Okupas</i> (miniseries – Argentina)	12. <i>El Cartel</i> (telenovela – Colombia)
6. <i>Post Mortem</i> (miniseries – Argentina)	13. <i>Esmeralda</i> (telenovela – Mexico)
El Trece – 0 productions	14. <i>La Usurpadora</i> (telenovela – Mexico)
América – 0 productions	15. <i>La Venganza de Analía</i> (telenovela – Colombia)
Net TV – 0 productions	16. <i>Metástasis</i> (series – Colombia)
Bravo TV – 0 productions	17. <i>Primera Dama</i> (telenovela – Colombia)
CO-PRODUCTIONS – 0	18. <i>Querer sin Límites</i> (telenovela – Brazil)
	19. <i>Rosario Tijeras</i> (series – Mexico)
	20. <i>Los Herederos del Monte</i> (telenovela – Colombia, Hispanic US)
	El Nueve – 0 productions
	América – 0 productions
	TV Pública – 0 productions
	El Trece – 0 productions
	TOTAL RERUNS: 20

Source: Obitel Argentina

Outside the Obitel sphere, numerous Turkish shows were programmed, although, unlike in previous years, most of them were broadcast in the evenings. Telefe broadcast

the Turkish telenovelas *Amor de Familia*, the return of *Doctor Milagro* on Saturday afternoons, *Fugitiva*, *Hercai*, *Nuestro Amor Eterno*, *Soñar Contigo* and *Zuleyha*. Bravo TV broadcast in prime-time the Turkish fiction *En Nombre del Honor* and NetTV the Italian-Argentine telenovela *Tierra Indomable*, originally released in 2010. These productions, which generally exceed 150 chapters each on average, added to the large number of reruns of *Obitel*, especially on Bravo TV and NetTV, explain the increase of fiction as a genre on the open television screen. Added to this there is an unusual practice in open television channels in Buenos Aires, which is the repetition of the same episode in two different time slots within the same day. Such is the case of *Pedro el Escamoso* on NetTV broadcasted from six to seven in the morning and then from five to seven in the afternoon. This strategy is even more accentuated in Bravo TV, which did the same with shows such as *Avenida Brasil*, *Destilando Amor*, *Esmeralda*, *Primera Dama*, *Querer sin Límites*, and even the telenovela *Enfermeras*, which had two versions: one suitable for all audiences that aired at 3 pm, and another promoted as “original version uncut rerun” at 11 pm the same day¹³.

TABLE 2. Formats of national fiction released in 2022
and its evolution in the five-year period.

Format	Productions						Hours					
	2018	2019	2020	2021	2022	Total	2018	2019	2020	2021	2022	Total
Telenovela	5	4	1	1	2	13	389:10	289:30	35:00	72:10	115:05	900:55
Series	3	5	0	2	0	10	55:30	38:00	0:00	14:10	0:00	107:40
Miniseries	10	8	4	5	9	36	66:20	36:30	26:45	17:00	28:55	175:30
Sitcom	0	1	0	0	0	1	0:00	0:00	0:00	0:00	0:00	0:00
Unitary	2	0	0	0	0	2	16:00	7:40	0:00	0:00	0:00	23:40
Docudrama	0	0	0	0	0	0	0:00	0:00	0:00	0:00	0:00	0:00
Others	0	0	0	0	0	0	0:00	0:00	0:00	0:00	0:00	0:00
Total	20	18	5	8	11	62	527:00	371:40	61:45	103:20	144:00	1207:45

Source: Kantar Ibope Media y Obitel Argentina

The evolution of formats in the last five years allows noticing the quasi-disappearance of the national premiere telenovela from the open television screen. In any case, short formats (series, miniseries, unitaries) are also decreasing, although the latter, as we will see below, reappear as the favorite format of Argentine fiction on VoD platforms. Taking the period 2018-2022, a 45% drop in the number of productions and 53% in the number of hours is observed. The latter indicator sinks further due to the disappearance of telenovelas and the increase of short formats, which contribute fewer hours and gain more relative weight in the programming.

¹³ See more at https://www.grupocronica.com.ar/resources/descargables/mediakit_bravo_tv_2022.pdf

TABLE 3. Released fiction exhibited in 2022: countries of origin

Country	Productions	%	Hours	%
NATIONAL (total)	11	65	144:00	15
OBITEL COUNTRIES (total)	6	35	831:30	85
Argentina	11	65	144:00	15
Brazil	2	12	136:20	14
Chile	0	0	0:00	0
Colombia	1	6	342:15	35
Ecuador	0	0	0:00	0
Spain	0	0	0:00	0
Hispanic US	1	6	314:05	32
Mexico	1	6	35:25	4
Peru	0	0	0:00	0
Portugal	0	0	0:00	0
Uruguay	0	0	0:00	0
Venezuela	0	0	0:00	0
CO-PRODUCTIONS (totals)	2	12	12:30	1
National Co-Productions	1	6	9:20	1
Obitel countries Co-Productions	1	6	2:35	0
TOTAL	17	100	975:30	100

Source: Kantar Ibope Media y Obitel Argentina

The total number of national releases remains stable in relation to the previous year, but distorted by the launching, on El Trece, of single promotional episodes of series made exclusively for the Star+ platform. Along with the above, there is a slight recovery in the number of national premiere hours after the historic low reached in the first year of the pandemic. However, the 144 hours of national releases in 2022 are far from the more than 1000 hours of a decade ago, thus consolidating a process of displacement of Argentine fiction from open television to the platforms. The presence of Obitel fiction increased by almost 200 hours with respect to the previous year. The countries of origin of these contents are the same: Brazil, Colombia, Hispanic United States and Mexico.

TABLE 4. Formats of national and Ibero-American fiction exhibited in 2022

Format	Productions				Hours			
	National	%	Obitel Area	%	National	%	Obitel Area	%
Telenovela	2	18,2	5	83,3	115:05	79,9	828:50	99,7
Series	0	0,0	1	16,7	0:00	0,0	0:00	0,0
Miniseries	9	81,8	0	0,0	28:55	20,1	2:40	0,3
Telefilm	0	0,0	0	0,0	0:00	0,0	0:00	0,0
Unitary	0	0,0	0	0,0	0:00	0,0	0:00	0,0
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	11	100	6	100	144:00	100	831:30	100

Source: Kantar Ibope Media y Obitel Argentina

As shown in the table above, in the field of Argentine fiction, the releases of short-format productions are preponderant. In the case of national telenovelas, of the two reported, only one was released during 2022 and the other is a continuation of a production started the previous year. As usual, in the opposite direction, imports of Obitel productions are concentrated almost exclusively in telenovelas.

TABLE 5: Top 10 Most watched productions in 2022

Title		Channel	Production company (country)	Format/genre	No. of episodes in 2022	Time slot	Rating	Share
1	<i>El Primero de Nosotros</i>	Telefe	Viacom Studios (AR)	Telenovela	59	Prime-Time	11,2	16,6
2	<i>La 1-5/18. Somos Uno</i>	El Trece	Pol-Ka (AR)	Telenovela	60	Prime-Time	8,9	14,8
3	<i>Dulce Ambición</i>	Telefe	Globo (BR)	Telenovela	46	Tarde	8,9	17,8
4	<i>El Encargado</i>	El Trece	Pegsa Group (AR)	Miniseries	1	Prime-Time	8,6	13,4
5	<i>Génesis</i> ¹⁴	Telefe	Record TV (BR)	Telenovela	93	Prime-Time / Tarde	8,0	12,5
6	<i>Santa Evita</i>	El Trece	Non Stop (AR)	Miniseries	1	Prime-Time	7,8	11,2
7	<i>Los Protectores</i>	El Trece	Kapow (AR)	Miniseries	2	Prime-Time	7,4	9,7
8	<i>Robo Mundial</i>	El Trece	Full Frame, Pampa Film, Gloriamundi (AR)	Miniseries	1	Prime-Time	6,1	9,8
9	<i>Supernova</i>	El Nueve	Kapow and Grupo Octubre (AR)	Miniseries	4	Prime-Time	1,7	2,2
10	<i>El Hinch</i>	El Nueve	GM Comunicación. Grupo Octubre (AR)	Miniseries	6	Prime-Time	1,5	2,0
Total National Productions: 8				Foreign Original Scripts: 2				
80%				20%				

Source: Kantar Ibope Media and Obitel Argentina

As in the previous year, the most watched fiction is national, with an average rating slightly higher than the show that topped the top ten in 2021. Also as in 2021, two of the ten most watched shows are of Brazilian origin. The remaining ones are Argentine, but as we have mentioned, four of them are actually single promotional episodes of series exclusive to the Star+ platform.

¹⁴ The telenovela Génesis (Telefe) was broadcast in 2022 in two different timeslots. Originally, the channel programmed it in prime-time where it aired 53 episodes with an average rating of 9.3. It then moved to the evening time slot where it aired another 40 episodes with an audience of 6.6 rating points. Thus, in order to avoid duplicating the title in the top ten, all the audience indicators presented in tables 5 and 6 are averages of the broadcasts in both time slots.

TABLE 5a: Top 10 most watched national productions in 2022

Title		Channel	Production company (country)	Format/genre	No. of episodes in 2022	Time slot	Rating	Share
1	<i>El Primero de Nosotros</i>	Telefe	Viacom Studios (AR)	Telenovela	59	Prime-Time	11,2	16,6
2	<i>La 1-5/18. Somos Uno</i>	El Trece	Pol-Ka (AR)	Telenovela	60	Prime-Time	8,9	14,8
3	<i>El Encargado</i>	El Trece	Pegsa Group (AR)	Miniseries	1	Prime-Time	8,6	13,4
4	<i>Santa Evita</i>	El Trece	Non Stop (AR)	Miniseries	1	Prime-Time	7,8	11,2
5	<i>Los Protectores</i>	El Trece	Kapow (AR)	Miniseries	2	Prime-Time	7,4	9,7
6	<i>Robo Mundial</i>	El Trece	Full Frame, Pampa Film (AR)	Miniseries	1	Prime-Time	6,1	9,8
7	<i>Supernova</i>	El Nueve	Kapow and Grupo Octubre (AR)	Miniseries	4	Prime-Time	1,7	2,2
8	<i>El Hinch</i>	El Nueve	GM Comunicación. Grupo Octubre (AR)	Miniseries	6	Prime-Time	1,5	2,0
9	<i>Sumergidos</i>	TV Pública	Story Lab Jaque Content (AR/BR)	Miniseries	13	Prime-Time	0,5	0,7
10	<i>Las Polacas</i>	TV Pública	Suárez/Ciampechini (AR)	Miniseries	6	Prime-Time	0,2	0,3
Total National Productions: 10				Foreign Original Scripts: 0				
100%				0%				

Source: Kantar Ibope Media and Obitel Argentina

In recent years, Obitel Argentina has observed that productions with relatively low audience levels and broadcasted in channels that compete for the fourth or fifth position in the general rating, nevertheless manage to include national fictions among the most watched programs of the year, given the generalized drop in the fiction audience and the lower broadcasting of this type of contents.

In fact, series such as *Las Polacas* of TV Pública with an average of 0.2 rating points enter the national top ten. On its part, El Nueve includes among the most watched shows two of its own fictions: *Supernova* and *El Hinch*, also with audience levels below two points. Grupo Octubre, which controls El Nueve, a station that does not usually produce or broadcast national fiction, enters the group of channels that have produced fiction, with *Supernova* for the Prime Video platform and *El Hinch* for Flow of Grupo Clarín.

TABLE 6: Audience profile of the 10 most watched productions:
gender, age, socio-economic status

Title		Channel	Sex %		SES%			
			Women	Men	ABC1	C2	C3	D
1	<i>El Primero de Nosotros</i>	Telefe	63,7	36,3	24,7	15,9	28,4	31,0
2	<i>La 1-5/18. Somos Uno</i>	El Trece	54,1	45,9	21,8	21,5	26,0	30,8
3	<i>Dulce Ambición</i>	Telefe	64,5	35,5	29,4	15,6	20,6	34,4
4	<i>El Encargado</i>	El Trece	52,4	47,6	9,3	30,3	32,0	28,3
5	<i>Génesis</i>	Telefe	61,3	38,7	16,6	12,2	27,6	43,4
6	<i>Santa Evita</i>	El Trece	55,1	44,9	8,0	34,0	32,3	25,7
7	<i>Los Protectores</i>	El Trece	56,8	43,2	35,0	11,6	28,1	25,4
8	<i>Robo Mundial</i>	El Trece	54,7	45,3	9,9	23,3	28,8	38,0
9	<i>Supernova</i>	El Nueve	43,5	56,5	27,2	20,8	24,7	27,3
10	<i>El Hinch</i>	El Nueve	45,2	54,8	2,5	29,2	31,9	36,4

Title		Age %				
		04 - 12	13-19	19-24	35-44	45+
1	<i>El Primero de Nosotros</i>	16,4	20,1	22,7	20,1	20,6
2	<i>La 1-5/18 Somos Uno</i>	17,4	16,8	21,7	17,2	26,9
3	<i>Dulce Ambición</i>	15,2	19,1	22,1	20,7	22,9
4	<i>El Encargado</i>	17,1	14,3	19,0	16,8	32,8
5	<i>Génesis</i>	13,9	17,1	24,9	23,0	20,8
6	<i>Santa Evita</i>	15,9	29,6	8,4	21,0	25,0
7	<i>Los Protectores</i>	18,6	16,2	19,8	12,9	32,5
8	<i>Robo Mundial</i>	26,0	15,2	26,2	9,8	22,7
9	<i>Supernova</i>	6,8	20,0	27,9	25,8	19,6
10	<i>El Hinch</i>	13,4	16,4	18,8	29,2	22,2

Source: Kantar Ibope Media y Obitel Argentina

As for the audience profile, there are no major novelties. In relation to gender, women are in the majority in almost all cases, with exceptions such as *Robo Mundial*, which deals with football and attracted the interest of a larger portion of male audience. Seen by socioeconomic level, fiction on open television is mainly consumed by audiences with middle and low income. As in previous years, it is observed that the audience of biblical-themed serial fictions such as *Génesis* (Record, Brazil) is mostly composed of the lower-income segment. On average, 43.5% of the audience of the ten most watched fictions is 35 years old or older.

3. VoD 2022 Monitoring

During 2022, the consolidation of the ecosystem of global or international platforms that produce fictional content in Argentina continued. The main global video-on-demand platforms operating in the country (Netflix, Prime Video, Star+, Disney+, HBO Max) doubled the release of Argentine original fictions compared to the previous year. Since 2018, when Netflix premiered *Edha*, the first Argentine fiction made for a platform, year by year the number of premieres has increased until reaching 14 in 2022.

Thus, the number of national releases in VoD services (14) widely surpassed the releases in open television (11). In turn, as we have mentioned, out of the total number of productions that Obitel considers open television releases, four are actually pre-releases of one or two episodes of productions made for platforms: *El Encargado*, *Santa Evita*, *Los Protectores* and *Robo Mundial*, all of them Star+ exclusive productions whose first episode¹⁵ was broadcast by El Trece. This consolidates a trend that we have been reporting since previous years regarding the displacement of fiction production from the traditional screen to video on demand systems.

3.1 VoD platform market in 2022

The video-on-demand platform market showed no significant changes in 2022 in Argentina. Market leadership, until recently strongly dominated by one company, is now shared between Netflix (25%) and Prime Video (24%), according to Havas data for the third quarter of 2021. According to this consultancy, Disney+ (13%), HBO Max (10%) and Paramount+ (6%) also have significant market shares. With the sole exception of Flow, linked to the ICT services operator Personal (Telecom-Clarín), the rest of the TVE (TV Everywhere) platforms linked to subscription television operators, including Movistar TV, Telecentro Play, Claro Video, DirecTV Go, have not yet ventured into the production of original national fictions.

On the consumption side, according to data from the consulting firm Carrier y Asociados, during 2022, 94% of households connected to the Internet will use some video on demand service, which represents an increase of 4% over the previous year. According to the same consulting firm, having already overcome the boom in subscriptions that occurred during the pandemic, the adoption of video streaming services will continue to grow in 2022, even in low socioeconomic households and among older populations. Furthermore, improvements in broadband connectivity conditions in the country allow these services to be adopted in large urban centers, medium-sized cities and small towns, almost equally in percentage terms¹⁶.

¹⁵ In the case of *Los Protectores*, El Trece aired the first two episodes of the Star+ exclusive fiction.

¹⁶ Watch Streaming Caudaloso, 09/09/2022, available at <https://mailchi.mp/6d2709d7fd72/streaming-caudaloso?e=883840bcc8>.

3.2. Local VoD platforms in 2022 (national, regional)

Along with global and transnational platforms and some local initiatives such as Flow, linked to the subscription television operator Personal (formerly Cablevisión), which serves as an Internet aggregator of content from different sources, we can find the platforms of the National State. Cont.ar, under the state-owned company Contenidos Públicos Sociedad del Estado, is a reversion of a predecessor platform, Contenidos Digitales Abiertos (CDA) of 2011, which operates completely free of charge (FVOD) and includes in its catalog a significant number of national series, especially those made with state support. It is also a space to access the live streaming transmissions of all public channels (TV Pública, Encuentro, PakaPaka, Depor TV), Radio Nacional and other cultural contents. For its part, Cine.ar Play, managed by the National Institute of Cinema and Audiovisual Arts (INCAA, in Spanish) has been operating since 2015 (previously under the brand Odeon) and as of 2022 had accumulated 481,505 unique users, according to data from Empresa Argentina de Soluciones Satelitales (AR-SAT)¹⁷. Cine.ar Play offers short fiction, movies and documentaries with free access or pay-per-transaction mode (TVOD).

3.3. VoD analysis in 2022: national release fiction and co-productions

In 2022, the five main global video platforms released a total of 14 national serialized fiction productions, the highest number since these services have been producing fictional contents in the country. Such proliferation evidences a greater interest of global streaming platforms in producing national contents in association with independent production houses, all of them based in Buenos Aires and with extensive background in audiovisual production, both in film and television.

¹⁷ Data available in April 2023 at <https://datos.arsat.com.ar/dataset/cinear-play>.

TABLE 7. National fiction and co-productions exhibited in 2022 on VoD systems

RELEASE NATIONAL PRODUCTIONS	RELEASE CO-PRODUCTIONS
Netflix (3)	No co-productions to report in 2022
01. <i>El Marginal 4</i> (miniseries)	
02. <i>El Marginal 5</i> (miniseries)	
03. <i>Casi Feliz 2</i> (miniseries)	
HBO Max (1)	
04. <i>María Marta: El Crimen del Country</i> (miniseries)	
Disney+ (1)	
05. <i>Tierra Incógnita</i> (miniseries)	
Prime Video (4)	
06. <i>Porno y Helado</i> (miniseries)	
07. <i>Iosi, El Espía Arrepentido</i> (miniseries)	
08. <i>Supernova</i> (miniseries)	
09. <i>El Fin del Amor</i> (miniseries)	
Star+ (5)	
10. <i>Santa Evita</i> (miniseries)	
11. <i>Los Protectores</i> (miniseries)	
12. <i>Limbo</i> (miniseries)	
13. <i>El Encargado</i> (miniseries)	
14. <i>Robo Mundial</i> (miniseries)	
Total: 14	Total: 0

Source: Obitel Argentina

The first video-on-demand platform to establish itself in the domestic market in 2011 and to produce national content in 2018 is Netflix, which released a total of ten original productions by 2022. That number is enough for it to lead as the global platform with the most Argentine content of its own production. However, in the last two years, both Prime Video and Star+ have accelerated the pace of local releases and already have six original Argentine productions each. 2022 was a prolific year for Star+, which released five series, while Prime Video did the same with four releases. HBO and Disney+ followed them among the platforms that also ventured into the production of Argentine content, although at a slower pace. All of them are miniseries of between eight and thirteen episodes.

3.4. Narrative characteristics of VoD in 2022

Unlike previous years, when platform releases focused on issues related to corruption, organized crime or violence, since 2021 the narrative panorama has been more diverse. The most notable exception is the continuity of a rather violent story, with the release of the fourth and fifth seasons of the prison-themed series *El Marginal* (Underground/Telemundo). It is worth remembering that this is an original title of TV Pública de Argentina (Channel 7) which, after its transfer to the platform, which was in charge of the production of the last three seasons, accentuated the darker aspects of the plot with emphasis on explicit violence, crimes, the functioning of

mafias inside prisons, the confrontation between gangs and the collusion between inmates and prison authorities, among others.

Light and youthful comedy, with some dramatic twists, dominated the panorama of release series on the platforms. There we have the second season of the Netflix series *Casi Feliz* (HC Films and Tiger House), a comedy that follows the work, love and family vicissitudes of a radio host, where the greatest conflict is concentrated in his difficulty to solve his love life in middle age. With their own thematic nuances, the same line is followed by series such as *Porno y Helado* (Navajo Films for Prime Video), which tells the story of a group of young friends who are forced to create a fake music band; *El Fin del Amor* (K&S Films for Prime Video), based on the book of the same name by Tamara Tenenbaum, narrates the journey of a young journalist and philosophy professor who questions some of her life decisions, her relationship with her family and her Jewish faith; and *Supernova* (Kapow for Prime Video), whose story focuses on the lives of three characters on the threshold of their 30s who face social mandates while discovering their desires and frustrations.

On the other hand, there are some productions that take as thematic references real police events or events related to the recent history of the country. *María Marta: El Crimen del Country* (WarnerMedia International, Kapow and Pol-ka Producciones for HBO) takes to fiction one of the most resounding and mediatic crimes of the last decades in Argentina. *Iosi, el Espía Arrepentido* (The Mediapro Studio for Prime Video) tells the story of an intelligence agent infiltrating the Jewish community of Buenos Aires, based on the investigative book of the same name by Horacio Lutzky and Miriam Lewin. *Santa Evita* (Non Stop for Star+), based on the 1995 novel by Tomás Eloy Martínez, combines real and fictional events surrounding the kidnapping of the embalmed body of Eva Duarte de Perón.

4. Interactivity and audience participation

The scarce national productions released during the year, added to an also poor performance, show that the place of national primetime fiction has lost again this year the impact it had in other moments. This is accompanied by a null proposal for audience participation, for which there is minimal interaction in the official comment spaces in the different social networks (Facebook, YouTube, the channel's website and Twitter). In these spaces, the audience is invited to relive particular moments of the fiction and to watch episodes or highlights. In spite of this, audience participation in these spaces is focused on comments on the programs. In this sense, it is interesting to analyze two moments of the plot of *El Primero de Nosotros* (Telefe). One quite celebrated in social networks is the moment when actors Jorge-lina Aruzzi (Valeria in *El Primero de Nosotros* and Lily in *Chiquititas*, 2006 Telefe) and Gastón Ricaud ("Kili" in *Chiquititas*) meet on a date through an application for

that purpose, and end up kissing. What was celebrated in the networks (particularly Twitter) more than the love encounter of the telenovela released this year, was the love encounter that did not happen then (in *Chiquititas*). The love tension between Lily and “Kili” in the children’s soap opera ends up materializing in this other one.



Source: Twitter¹⁸

The *Chiquititas* fandom celebrated this meeting on the social network by posting photos of then and now, and reflecting on the years that have passed since then. A now adult audience that remembers a platonic adolescent love.



Source: Twitter¹⁹

¹⁸ In the Twitter post, along with the sequence of images, it can be read: “Do you understand that in today’s episode of *El Primero de Nosotros* they made us go back to 2006 when we saw Lili and Kili in *Chiquititas*? In short, they wanted to tell us that we are old.

¹⁹ In the first image can be read: “I have seen this scene about 5 times and I am still crying like the first time. Tremendous performance by @benjavicunamori and @castrolucianoOk”. In the second image, the following dialogue can be read: 1) Are you done with the series? 2) The series ended with me.

The other narrative moment that generated a lot of interaction was the end of the fiction, in which the main character dies after suffering from cancer. The farewell to his friend Nico (played by Luciano Castro), who accompanies him at the moment of his death, generated great impact on the audience. It was read as a moment of true love, of surrender and pain, and at the same time celebrated due to Castro's great performance. A certain playful tone, more typical of humor, appeared in some posts to describe the emotion of the ending.

5. Highlights of the Year

2022 is the longed-for effect of a consolidated audience in front of the TV set watching an open channel. This was the constant of the live broadcasts of the Qatar 2022 World Cup. In this context, the rating achieved by TV Pública for the Argentina-France final match was 38.4 points, an extremely unusual number for any channel, but especially for the state channel, which, as stated, has an almost non-existent rating, at least in the urban centers where Kantar Ibope carries out its measurements. In this sense, the World Cup generated numbers that are not found in any other event.



Source: Televisión.com with data from Kantar Ibope Media.

Beyond the World Cup period, Argentine open television maintains -in 2022- a programming linked to non-fiction genres²⁰. The most watched program of the year was the new edition of *Gran Hermano* (*Big Brother*), which was scheduled to last three months and was extended for five and a half months. The reality show not only had its two daily editions, but also a very large set of satellite programs that included a show with the intervention of ex-participants from previous editions who commented on the alternatives in the house and a specific debate show. In addition, there is a series of programs that comment on the details of the participants of the

²⁰ It is noteworthy that the six most watched programs on television in 2022 are programs related to reality TV: *Gran Hermano*, *La Voz Argentina*, *Master Chef Celebrity*. To see the performance of the different programs, please visit <http://television.com.ar/los-10-programas-mas-vistos-de-2022/239312>.

house, another one with interviews to those who were eliminated from the house, and finally, a special party broadcast on Friday nights. In this way, the conversation about *Gran Hermano* is reproduced and increased from program to program. This happens on Telefe, the channel that broadcasts the reality show, as well as on El Trece and América, which incorporate the topic in their talk shows.

6. Theme of the Year: Independent production companies and the internationalization of production.

The emergence of audiovisual narrative was initially marked, in the first half of the 20th century, by cinema as a medium. This implied not only the construction of a type of on-screen narrative, but also a space for gathering, ritual and community consumption. The change that occurs in the middle of the century with the domestic incorporation of television will be the dominant one until almost the end of the first decade of the 21st century. Television (open television at first and pay TV later) ruled and disputed both the news agenda and serial fiction production, which found in this medium a space to grow and become an industry (on an international scale, at least in our country). This expansion and growth effect was lost as gradually as it had been gained. The migration and specification of audiences from the linear television screen in favor of other screens, whose presence develops vertiginously, has changed the productive panorama of national fiction (serial and non-serial, television and cinematographic). The current scenario is described by Axel Kuschevatzky in an interview conducted by Diego Lerer as a crisis for audiovisual production:

La forma de financiación que sostuvo al cine argentino desde 1996 está en estado agónico (...). Me refiero al modelo de coproducción con Europa sostenido por fondos públicos. Con la depreciación de la moneda local y la falta de actualización de los fondos de fomento no se puede prefinanciar una película de rango medio para arriba. Y en ese movimiento los cineastas argentinos de perfil más alto fueron hacia las series y películas financiadas por empresas extranjeras que no dependen de fondos públicos. Pablo Trapero, Damián Szifron, Juan José Campanella: todos empezaron a construir una carrera en el exterior porque la capacidad de financiación de la Argentina estaba muy reducida (2023)²¹.

This passage between narrative spaces is also highlighted by Marcelo Stiletano, in the newspaper *La Nación* (2022), who states that: “El reconocimiento para El reino

²¹ “The form of financing that has sustained Argentine cinema since 1996 is in an agonizing state (...) I am referring to the model of co-production with Europe supported by public funds. With the depreciation of the local currency and the lack of updating of development funds, it is not possible to pre-finance a mid-range film. And in that movement, Argentine filmmakers of higher profile went towards series and films financed by foreign companies that do not depend on public funds. Pablo Trapero, Damián Szifron, Juan José Campanella: they all started to build a career abroad because Argentina’s financing capacity was so reduced” (2023).

y la llegada inminente de títulos muy atractivos consolidan una transformación que parece inexorable: todas las nuevas ficciones producidas en nuestro país tienen destino de plataforma” (n/d)²².

In this scenario, in addition to the financial crisis, it is evident that convergence does not only operate in the technological aspect, but also that this situation has affected spaces that are usually diverse: that of cinematographic narration and television serialized narration. Nowadays, audiovisual directors do not distinguish their expressive medium. This transformation was led, in particular, by independent production companies, since they are the institutions that have the most flexible and adequate structure for the mode of production demanded by the new actors.

The existence of independent production companies in Argentina is a structure installed prior to the movements that have dominated the last decade. Argentina has historically had an important audiovisual production, both in terms of volume and quality recognition. This production was sustained in the cinematographic space by state subsidies that finance filmmaking through the National Institute of Cinematography and Audiovisual Arts (INCAA) and television narrative with private financing. The exception to this form of production was that transmitted by the public television channel.

As has been commented in previous yearbooks, for years the two television networks with the best performance programmed fiction from independent production companies associated to the networks. In the case of El Trece, its associated production company was Pol-ka. On the other hand, other networks such as América or Telefe worked with a wider variety of production companies, particularly with fictions by Underground (Ortega) or Dori Media (Dori), among others. These production companies were responsible for a series of thematic, format and style renovations in national open television during the new millennium.

Today, this scenario has been radically transformed. What was guaranteed in the scheme until the beginning of the second decade of the century was the exhibition screens. The new actor on the scene is distribution. Unlike the two traditional channels (cinema and television), it is now the form of distribution that makes up a new ecosystem. According to Rivero and Bizberge (2022) this is

(...) integrado por actores de distinto origen, modos de financiamiento y tipo de gestión (público o privada), aunque con predominio de gestión privada: 1) surgidos del entorno digital o “nativos de Internet” (Netflix, Apple, Amazon), 2) provenientes de la industria audiovisual tradicional de creación de contenidos (HBO, Disney, Star) y 3) vinculados a empresas de telecomunicaciones y transporte de datos (Telefónica, Claro, Telecom); 4) a las empresas de TV paga (por ejemplo DirecTV Go); 5) las plataformas estatales de acceso gratuito (Cine.ar, Cont.ar, entre otros). (p.5)²³

²² “The recognition for *El reino* and the imminent arrival of very attractive productions consolidate a transformation that seems inexorable: all new fiction produced in our country is destined to be in a platform”.

²³ “(...) made up of players of different origins, financing methods and type of management (public or private), although with a predominance of private management: 1) emerging from the digital

Different alliances show the increase in national production for streaming platforms, which are displacing the productive capacity towards their audiovisual spaces, relegating both cinema and linear open television. In the case of Netflix, Rivero and Bizberge observe that almost 50% of the national production offer in the platform

se concentra en 18 firmas, la mayoría empresas nacionales de extensa trayectoria en la prestación de servicios audiovisuales para el mercado local y regional. Cuarzo Entertainment Argentina (ex Endemol) participa como productora en 4 títulos, seguida de Patagonik Film Group, Pampa Films, Torneos, Mandarina Ideas y Contenidos, Pol-ka, Underground (Telemundo), K&S, HC Films y Non Stop, todas ellas con 1 título cada una. Productoras como Cinema 7 también integran la lista pero especializadas en contenidos deportivos, mientras que BluePrint Content participa en la realización de los especiales de stand-up nacionales (2022, p.10)²⁴.

However, in the total offer on Netflix there is both fiction and non-fiction, both series, miniseries and feature films. They also note that

en empresas productoras de contenidos audiovisuales tradicionales como HBO Max, Paramount+ y Star+ tienden a acotar el listado de casas independientes a las que requieren servicios de producción. Cuando lo hacen, los nombres se reiteran, siendo también habitual que la realización quede en manos de la propia empresa que ya cuenta con capacidades para producir contenidos. En el caso de las plataformas “nativas de Internet”, Netflix y Amazon Prime Video, se vinculan con un número mayor de casas productoras independientes. (Rivero y Bizberge, 2022 p. 17)²⁵.

If we focus on fiction serialized releases in the four main platforms, we find a total of 28 releases of national production in their libraries since their landing in Argentina²⁶.

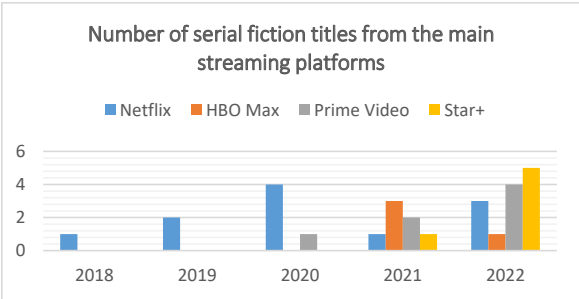
environment or “Internet natives” (Netflix, Apple, Amazon), 2) coming from the traditional audiovisual industry of content creation (HBO, Disney, Star) and 3) linked to telecommunications and data transport companies (Telefónica, Claro, Telecom); 4) pay TV companies (for example DirecTV Go); 5) free access state platforms (Cine.ar, Cont.ar, among others)”. (p.5)

²⁴ “is concentrated in 18 companies, most of which are national companies with extensive experience in the provision of audiovisual services for the local and regional market. Cuarzo Entertainment Argentina (formerly Endemol) participates as producer in four productions, followed by Patagonik Film Group, Pampa Films, Torneos, Mandarina Ideas y Contenidos, Pol-ka, Underground (Telemundo), K&S, HC Films and Non Stop, all of them with 1 production each. Producers such as Cinema 7 also make up the list but specializing in sports content, while BluePrint Content participates in the production of national stand-up specials” (2022, p.10).

²⁵ “traditional audiovisual content production companies such as HBO Max, Paramount+ and Star+ tend to narrow down the list of independent houses from which they require production services. When they do so, the names are reiterated, and it is also common for the production to be left in the hands of the company itself, which already has the capacity to produce content. In the case of the “Internet-native” platforms, Netflix and Amazon Prime Video, they are linked to a larger number of independent production houses” (Rivero and Bizberge, 2022 p. 17).

²⁶ Netflix: 10 productions from 2018; HBO Max, 4 productions from 2021; Prime Video 5 productions from 2020 and Star+ 2 productions from 2021.

The distribution of original material produced for the platforms in numbers evidences a sort of illusion with respect to the overabundance of presence of the platforms and their benefit in relation to the national audiovisual industry.



Source: Obitel Argentina.

The apparent expansion of the national audiovisual production market is evidence of a model that reduces and constrains the sector. This is why we cannot agree with the optimism of Stiletano (2022), who states that

El perfil de coproducción consigue dos resultados valiosos: un mayor respaldo financiero para sostener trabajos de gran exigencia y una llegada mucho más plausible a los mercados internacionales. De la mano del streaming, la Argentina podría recuperar en el mediano plazo algo o parte de su fortaleza perdida como protagonista reconocido de ficciones en el mundo audiovisual (s/p)²⁷.

This celebratory perspective overlooks the fact that the apparent openness has several drawbacks. On the one hand, the formats chosen are of short and medium duration, an aspect that does not guarantee a real growth of employment in the audiovisual production sector; on the other hand, the forms of production are detrimental to the actors of the audiovisual complex, since the agreements and forms of work that they would have in regulated spaces such as film and television are not always respected. In addition, there is the reproduction of a local and eventually international²⁸ star

²⁷ “The co-production profile achieves two valuable results: a greater financial backing to sustain highly demanding works and a much more plausible arrival to international markets. With streaming, Argentina could recover in the medium term some or part of its lost strength as a recognized protagonist of fictions in the audiovisual world” (n/d).

²⁸ This is how Stiletano describes it in his article in La Nación: “El punto más extremo de esa realidad se explica con la presencia en Buenos Aires de Robert De Niro, que pasó toda la semana pasada ocupado en su participación en el rodaje de Nada, la nueva serie de Mariano Cohn y Gastón Duprat que tendrá estreno directo en la plataforma Star+, una de las expresiones del poder audiovisual de Disney. La llegada a nuestro país de una de las máximas estrellas internacionales del cine en las últimas décadas no podría explicarse hoy en otro contexto. Hasta podría decirse que su participación en la serie funciona como un simpático aporte del star system internacional a su contrapartida local: Luis Brandoni y Guillermo Francella también estarán en esta ambiciosa producción, pensada para su estreno en streaming para 2023” (2022. s/p) (Translation: The most extreme aspect of this reality is explained by the presence in Buenos Aires of Robert De Niro, who spent last week busy shooting Nada, the new series by Mariano Cohn and Gastón Duprat that will have its direct premiere on the

system of production companies, actors and, as already mentioned, directors. In this situation, with no specific regulation and non-standardized ways of working, independent production companies are dependent on the programming space, the rhythm of production and the production cycles imposed by the platforms. But also of a demand for themes that, in many cases, are the result of a national specification that identifies themes, styles and belongings as a seal of nationality. A situation that in the case of Argentina privileges stories of violence, corruption and bad living, even when, as we have explained in this chapter, in 2022 the production of Argentine fiction on platforms has proposed a greater thematic diversity.

Star+ platform, one of the expressions of Disney's audiovisual power. The arrival in our country of one of the top international movie stars of the last decades could not be explained today in any other context. It could even be said that his participation in the series works as a sympathetic contribution of the international star system to its local counterpart: Luis Brandoni and Guillermo Francella will also be in this ambitious production, planned for its streaming premiere in 2023).

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BRAZIL: THE COMPLEXITY OF BRAZILIAN TELEVISION FICTION BETWEEN THE NATIONAL AND THE INTERNATIONAL¹

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Introduction

The year 2022 was historic for Brazil. The election of Luis Inácio Lula da Silva and the defeat of the Bolsonaro government (2019-2022) marked the return of democracy to the country. In recent years, we have witnessed the dismantling of ministries and the installation of a populist state with a government policy supported by *misinformation* (fake news distributed by certain press agencies and social networks), *negationism* (confrontation with science and especially the COVID-19 vaccine), and hate speech (discrimination and exclusion of racial, gender, class, sexual orientation).

It is against this background that this chapter describes the approaches adopted to understand the media and fictional television production in 2022. To achieve this, an expanded vision was employed to understand the complexity of its numerous dimensions. This year, efforts will be made towards the recovery of the national, regional and local audiovisual sector and its relations with the international streaming platforms existing in the country.

The expectations of Lula's victory and the end of the Bolsonaro government, in addition to the added scrutiny of an election year, are directly linked to a slow but progressive return of the State to investing in the audiovisual sector. Ancine (National Film Agency) made new calls for submissions regarding TV and VoD in 2022.

¹ The Obitel Brasil team thanks Kantar Ibope Media, whose kindly provided information made the analysis presented herein possible.

1. The Audiovisual Context of Brazil in 2022

1.1. Broadcast television in Brazil

Table 1. National broadcast television stations in Brazil in 2022

Private broadcasters (5)	Public broadcasters (2)
TV Globo ²	TV Brasil
TV Record	
SBT	TV Cultura
TV Band	
Rede TV!	
TOTAL NUMBER OF BROADCASTERS = 7	

Source: Obitel Brazil

The Brazilian television system consists of seven national television networks; five of them private, and two of them public.

²To better describe the complexity of the Brazilian television sector, we will adopt the following nomenclature in the case of Globo: GLOBO for the media and communication Globo Group and TV GLOBO for the Globo Group broadcast channel.

Graph 1. TV audience and share by broadcaster in 2022

Broadcaster	Home audience	Audience (%)	Share TLE (%)
TV Globo	11.7	46.6	33.8
TV Record	3.8	15.1	11.0
Pay TV	3.5	13.9	10.2
SBT	3.1	12.4	9.1
TV Band	1.0	4.0	3.1
OCA	0.7	2.8	2.1
TV Brasil	0.3	1.2	0.9
RedeTV!	0.3	1.2	0.8
Others	0.7	2.8	0.0
TOTAL	25.1	100.0	70.95

Source: Kantar Ibope Media - Obitel Brazil

As for the audience, there has been a slight increase in broadcast TV, with 21.6 points against 21.4 in 2021, reversing the gradual fall of recent years. TV Globo remains the leader, with 11.7 rating points - 0.1 point more than in 2021 - and a *share* of 33.8, growth of 1.6% compared to the previous year.

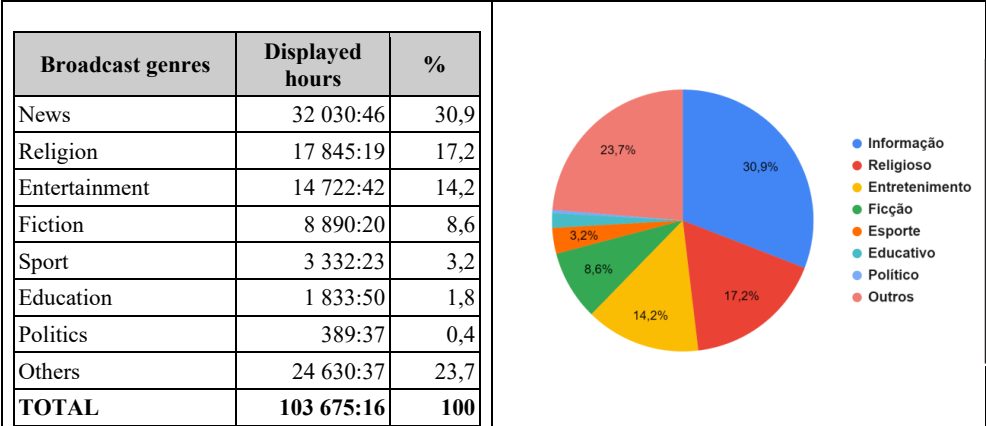
In the fight for the second place in ratings, Record maintained its position, with a drop of 0.6 point in relation to 2021. SBT was third, with 3.1 and also a small fall of 0.5. On the one hand, there was a yet small increase in the broadcast TV ratings; on the other hand, pay TV reaffirmed its downward trend in the country, with a reduction of 1.1 points and a contraction of 7.2% in 2022³.

As for the media penetration scores⁴, the internet reached 90.8% and has been consolidating as the most popular among Brazilians. Broadcast TV penetration continued to fall, with a decrease of about 8% compared to the previous year. Print media, especially newspapers, showed a small increase of 1% in year of election coverage. Cinema recovered from 2.4% to 11.3% thanks to the reopening of the rooms after the pandemic and blockbuster movie premieres .

³ According to data from December 2022 of Anatel (National Telecommunications Agency). <https://bit.ly/3oz5p6u>

⁴ Media penetration scores comparing 2022 to 2021: Internet, 90.8% against 87.7%; Outdoor Media, 80.3% at 84.5; Open TV, 72.1% to 80%; Radio, 43.9% to 41.9%; Pay TV, 26.1% to 34.3%; Magazines, 6.56% to 6.2%; Newspapers, 6.29% to 5.2%; Cinema, 11.3% to 2.4%. Source: Kantar Ibope Media - Target Group Index.

Graph 2. Genres and hours broadcast on TV programming in 2022⁵



Source: Kantar Ibope Media - Obitel Brazil

There was a decrease of about 9% in the total number of hours broadcast on television, compared to the previous year, which can be attributed to the increasing competition of other platforms, notably streaming. As for gender performance, we highlight: (1) the maintenance of *Information* leadership, closely related to the journalistic coverage of the elections; (2) the maintenance of genre positions in relation to 2021; (3) despite maintaining their fourth place, the hours of *Fiction* sharply dropped from 12.4% to 8.6%, still reflecting the interruption of shoots and the use of reruns; (4) The great increase in *Politics* quadrupled the hours of air time in 2022 as that was a year of fierce electoral dispute.

⁵ Genres: **Fiction**: Film, miniseries, telenovelas, series; **Entertainment**: auditorium, cars and engines, cooking, game show, comedy, children, musical, award show, reality show, shows; **Information**: debate, documentary, interview, journalism, news report; **Sports**: sports, soccer; **Religious**: educational; political; and **Others**: others, not included, rural, health, draw, teleshopping, travel and tourism. This final categorization was made by Obitel Brazil, based on Kantar Ibope Media categories.

1.2. Pay TV and VoD platforms in Brazil

Table 2. Pay TV channels in Brazil

The 10 most watched Pay TV channels in Brazil			
Channel	Genre	Origin	Rating (home audience)
SporTV	Sports	Brazil	0.21
VIVA	Fiction	Brazil	0.19
GloboNews	Information	Brazil	0.18
AXN	Fiction	Singapore	0.15
Universal TV	Fiction	United States	0.12
Cartoon Network	Children	United States	0.10
Discovery Chanel	Entertainment	United States	0.10
ESPN	Sports	United States	0.10
ESPN Brasil	Sports	Brazil	0.10
Premiere Clubes	Sports	Brazil	0.10

Source: Kantar Ibope Media

Of the 10 most watched channels on Paid TV, the SporTV had the highest audience. Its leading position can be linked to the World Cup in Qatar, as it owned the rights to air the world Cup Football. The VIVA channel, leader in the previous year, remains well positioned in second place, indicating the maintenance of the receivers interest in its fiction reruns. The GloboNews, a journalism channel, appears in the third place, which means the first three channels are Globo Group Pay TV. International channels remained practically the same among the 10 most watched, with fiction, children and entertainment content. Among the last three, there are sports channels in the year of World Cup football.

Table 3. Most important VoD platforms in Brazil

The 10 VoD platforms with the highest content
1. Amazon Prime Video
2. Netflix
3. Looke
4. Globoplay
5. DirecTV Go
6. HBO Max
7. Disney
8. STAR+ (Disney)
9. Box Brasil Play
10. Paramount+

Source: Ancine, 2022⁶

Table 3 lists the 10 platforms with the largest quantities of content operating Brazil. Seven of them are foreign and operate via subscriptions Five of them are Brazilian, which is equivalent to 50% of the *top ten*: Globoplay, Looke, Globoplay, DirecTV Go, and Box Brasil Play. With the exception of the first, the other three work in the transactional model (TVoD), that is, they are pay-per-view programmers – they are paid only for the work to be watched.

Amazon Prime Video presented the largest number of titles released in 2022 in Brazil, more than 7.6 thousand titles, which is followed by Netflix, with 5.2 thousand premieres. In turn, Globoplay presented 3.8 thousand titles; HBOMax, 3.2 thousand; Disney+, 1.3 thousand; Star+, 1.1 thousand; and finally, Paramount+, with only 648 titles.

Of all catalogs, only 10.9% of the production is of Brazilian origin⁷. However, national production is well ranked if we think that Globoplay was created in 2015 and appears third in the number of titles in the country.

1.3. Funding sources for the audiovisual sector

After three years without public calls for audiovisual productions, in 2022, Ancine released a call whose contribution was R\$ 100,000,000.00 (about USD 20,000,000.00) – a relatively low value, given the absence of calls in previous years and the repressed demand for subsidized projects throughout Brazil. Among the call categories, one was destined to production for television and streaming, worths R\$ 10,000,000.00 (about USD 2,000,000.00) .

⁶ Ancine, *Panorama of the Demand Video Market in Brazil*, Brasilia, CGI/SRG, 2022. <http://bitly.ws/FxSS>

⁷ Idem.

As in-person activities resumed, national and international fairs allowed new contacts and contracts to be made. In the 2022 Rio2C event, which returned after two years, there were 1,200 business rounds and 2,480 applications of projects for *pitching* focused on audiovisual, music, innovation⁸.

Funding through state and/or municipal funding agencies remains an important source, especially for small and medium-sized independent producers. In addition, there are permanent calls from private companies that contribute to cultural promotion in Brazil.

Another relevant source for independent producers is the advertising market, which moved R\$ 21.2 billion (about USD 4 billion) in 2022, an increase of 7% compared to 2021.

1.4. Communication policies

With the dismantling of communication sectors in the Bolsonaro management, Brazil lost its right to access true information and to dialogue with the government. According to the Report of the Technical Group of Social Communication⁹, made by the Government Transition Commission in December 2022, the throwback encouraged by disinformation caused damage to society in several areas, including public health issues, such as child vaccination and the fight against diseases practically extinct in Brazil until then.

The severity of this dismantling may be seen in two areas: Government Communication and Public Communication. In the first area, the Communications Secretary (Secom) was weakened; the instrumentalization of government communication; the lack of contracts in the digital communication area, and the fragile advertising contracts. In the second area, the changes in the public nature and deformation of programming of TV Brasil; the unification of TV Brasil and TV NBR¹⁰; the closing of TV Brasil Internacional¹¹; the scrapping of the EBC radio system¹²; censorship and downsizing of Agência Brasil¹³; the reduction of autonomy and of institutional investment on collection¹⁴; the cancellation of calls to contract content of independent production companies.

Because 2022 was an election year, communication played a central role in the fight against misinformation¹⁵. According to the Superior Electoral Court (TSE), several fronts were created for checking content, promoting good practices in online media use, and raising awareness for rules and policies in the electoral process.

⁸ <https://bit.ly/3C5fLhq>

⁹ The report was produced by the working group together with organized civil society. <https://bit.ly/3CfdOiV>

¹⁰ <https://tvbrasil.ebc.com.br>

¹¹ <https://memoria.ebc.com.br/tv-nbr>

¹² <https://bit.ly/437lajY>

¹³ <https://radios.ebc.com.br/>

¹⁴ <https://www.ebc.com.br/veiculos/agencia-brasil>

¹⁵ <https://bit.ly/3MUkKIf>

Another important action was to equating digital platforms with newspapers, radios and TV channels. This was central to punish *fake news* also by social media such as Facebook, Twitter, and Instagram. Finally, the audiovisual industry experienced a period of recovery after Ancine made new calls for projects execution¹⁶.

1.5. Digital and mobile connectivity infrastructure

In the two COVID-19 pandemic years (2020-2021), several sectors in Brazil were impacted by the advancement of internet use. This indicator was stabilized in 2022. According to CETIC (Executive Committee on Information and Communication Technology)¹⁷, a government department that conducts annual research on the use of the internet in Brazil, the country is facing the challenge of achieving universalization of access through strategies for the digital inclusion of the most vulnerable population¹⁸.

Internet users in Brazil amount to 149 million (84% of the Brazilian population), and 80% of the households have access to the internet. Of these, 142 million users are connected almost every day, with a prevalence in classes A (93%) and B (91%) and, in lower proportions, in C (81%) and DE (60%).

According to the survey, 92 million Brazilians access the internet by mobile phone only. Regarding the most sought content, regardless of the device, more than half (51%) seek to verify the legitimacy of an information obtained in the online environment. When this is done via mobile phone, the percentage drops to 37%; and it increases among those connecting by multiple devices, such as computers and mobile phones (74%).

Significant connectivity is the possibility for users to get a better benefit from the internet. The CETIC 2022 survey revealed that the quality of the device is as important as a good network connection. In relation to 2021, the connection by the computer remained stable (38%) and the use of television to access the internet went up, going from 50% to 55%, and the TV was the second most used device to access the network in Brazil, only behind the mobile phone. The number of VoD penetration increased by 1% in 2022 reaching 40% of the consumers.

Streaming is part of the routine of 71% of Brazilians, who claim to be subscribers or have already subscribed to some kind of service. Currently, there is a predominance between two players: 91% of Brazilians either subscribe or have subscribed to Netflix, and 53% of them either subscribe or have subscribed to Amazon Prime Video. Other platforms mentioned in the survey were Globoplay (30%); Disney+ (26%); HBO Max (20%); Telecine Play (13%); YouTube Premium (9%); Star+ (8%); Paramount+ (6%); Apple TV (4%).

¹⁶ <https://bit.ly/3MAzVoH>

¹⁷ <https://www.cetic.br/>

¹⁸ <https://bit.ly/3OGdKQG>

The survey also revealed that for 70% of the respondents, brand new content is the main reason for access to platforms, mainly movies and series. Among those who seem uninterested in brand new content, 44% of them pay attention to the series that everyone is talking about at the moment; 32% of them, classic films; 29% , documentaries; 26% , classic series that are no longer being aired; 16%, children's content; 10% of them, telenovela; 6%, anime; 5%, sports; and 3%, others¹⁹.

2. Analysis of the year: the national and Iberoamerican premiere fiction in 2022

Table 1. Premiere fictions aired in 2022
(national and foreign within the Obitel scope)

PREMIERE NATIONAL TITLES - 19	PREMIERE FOREIGN TITLES - 8
Globo (13 titles)	SBT (8 titles)
1. <i>Além da Ilusão</i> (telenovela)	1. <i>A Desalmada</i> (telenovela, Mexico)
2. <i>Cara e Coragem</i> (telenovela)	2. <i>Decisões do Dia</i> (series, US Hispanic Production)
3. <i>Cine Holliúdy</i> (series) season 2	3. <i>Paixões de Gavilanes</i> (telenovela, Mexico)
4. <i>Família Paraíso</i> (series)	4. <i>Se Nos Deixam</i> (telenovela, Mexico)
5. <i>Filhas de Eva</i> (series) season 1 (VoD)	5. <i>Te Dou a Vida</i> (telenovela, Mexico)
6. <i>Ilha de Ferro</i> (series) season 2 (VoD)	6. <i>Vencer o Desamor</i> (telenovela, Mexico)
7. <i>Mar do Sertão</i> (telenovela)	Band
8. <i>Nos Tempos do Imperador</i> (telenovela)	7. <i>Nazaré</i> (telenovela, Portugal)
9. <i>Pantanal</i> (telenovela)	8. <i>Valor da Vida</i> (telenovela, Portugal)
10. <i>Quanto Mais Vida, Melhor!</i> (telenovela)	
11. <i>Travessia</i> (telenovela)	
12. <i>Um Lugar ao Sol</i> (telenovela)	
13. <i>Verdades Secretas II</i> (telenovela) (VoD)	
Record (3 titles)	
14. <i>Reis</i> (series)	
15. <i>Todas as Garotas em Mim</i> (series) season 1	
16. <i>Todas as Garotas em Mim</i> (series) season 2	
SBT (1 title)	
17. <i>Poliana Moça</i> (telenovela)	
TV Cultura (1 title)	TOTAL PREMIERE TITLES: 27
18. <i>Independências</i> (miniseries)	
TV Brasil (1 title)	
19. <i>Brasil Imperial</i> (series)	

Source: Obitel

¹⁹ Cf. “Streaming 2022”, <https://www.infranewstelecom.com.br/sete-em-cada-dez-brasileiros-assi-nam-plataformas-de-streaming>

TABLE 1a. Reruns aired in 2022
(national and foreign within the Obitel scope)

NATIONAL RERUN TITLES - 21	FOREIGN RERUN TITLES - 4
Globo (6 titles)	SBT (4 titles)
1. <i>A Favorita</i> (telenovela)	1. <i>A Dona</i> (telenovela, Mexico)
2. <i>Chocolate com Pimenta – Special Edition</i> (telenovela)	2. <i>Amanhã é para Sempre</i> (telenovela, Mexico)
3. <i>Malhação - Sonhos</i> (soap opera)	3. <i>Cuidado com o Anjo</i> (telenovela, Mexico)
4. <i>O Clone</i> (telenovela)	4. <i>Mar de Amor</i> (telenovela, Mexico)
5. <i>O Cravo e a Rosa – Special Edition</i> (telenovela)	
6. <i>O Rei do Gado</i> (telenovela)	
Record (5 titles)	
7. <i>A Bíblia</i> (telenovela)	
8. <i>Amor sem Igual</i> (telenovela)	
9. <i>Chamas da Vida</i> (telenovela)	
10. <i>Jesus</i> (telenovela)	
11. <i>Os Dez Mandamentos</i> (telenovela)	
SBT (7 titles)	
12. <i>Carinha de Anjo</i> (telenovela)	
13. <i>Carrossel</i> (telenovela)	
14. <i>Cristal</i> (telenovela)	
15. <i>Cúmplices de um Resgate</i> (telenovela)	
16. <i>Esmeralda</i> (telenovela)	
17. <i>Maria Esperança</i> (telenovela)	
18. <i>Pequena Travessa</i> (telenovela)	
TV Brasil (3 titles)	
19. <i>A Terra Prometida</i> (telenovela)	TOTAL RERUN TITLES: 25
20. <i>Escrava Isaura</i> (telenovela)	
21. <i>Os Imigrantes</i> (telenovela)	

Source: Obitel

Marked by the continuity of the post-pandemic economic recovery, 2022 saw marked impacts in the production and screenings of serial fictions in Brazil. For the first time since 2019, there was an increase in the number of premiere titles aired on broadcast television, with 27 new titles compared to 25 reruns. A total of 52 aired titles represented an increase of 10.6% compared to 2021, when there was a drop in relation to the previous year, 2020.

The production of national premiere titles also increased by 11.7%, after two years of decline; it went from 17 to 19 titles. This increased production is an immediate reflection of the almost complete return of the recordings. Most of them are telenovelas (11), which indicates the resumption of long narratives production. Even so, there was an increase in telenovela reruns (50%), especially on SBT, due to the creation of a new exhibition schedule for them. TV Globo presented nine new telenovelas against five reruns, representing an 80%-increase in new telenovelas and an 80%-decrease in reruns of this type of format.

As for new titles, all broadcasts increased the number of premieres, except for TV Cultura, which maintained the same number of new titles (1). In 2022, Brazil celebrated **200 years of independence** which inspired works on public channels: miniseries *Independências*, on TV Cultura, and series *Brasil Imperial*, on TV Brasil. Public television increased the numbered of fictions on air, going from just one in 2021 to five in 2022.

It must be pointed out that TV Globo created a new schedule to air telenovela reruns, in addition to traditional show *Vale a Pena Ver de Novo*, in the afternoon. This schedule slot has always been the reason for audience disputes, and previous attempts of TV Globo had not improved its ratings. Only now, with one more telenovela schedule slot, it was possible to achieve such stability in the afternoon. TV Globo also made a new after-midnight schedule of a telenovela on the same day it was aired. This unprecedented action was taken in order to attract young audiences, used to being on social media at this time. The first telenovela to be re-aired was *Cara e Coragem*, from the 7-PM schedule, for which light and present-time narratives are usually produced.

The next three tables show how **production capacity** of the Brazilian television fiction was vigorously resumed in 2022.

**Table 2. Formats of national fiction premiere in 2022
and their evolution in a five-year period**

Format	Titles						Hours					
	2018	2019	2020	2021	2022	Total	2018	2019	2020	2021	2022	Total
Telenovelas	15	15	6	7	11	54	1193:25	1075:00	339:35	366:40	1187:25	4162:05
Series	18	18	9	9	7	61	102:50	85:00	34:10	50:45	97:30	370:15
Miniseries	4	5	1	1	1	12	12:55	20:25	7:45	1:05	12:00	54:10
Sitcom	0	0	0	0	0	0	0:00	0:45	1:40	0:00	0:00	2:25
Single-Episode	1	0	0	0	0	1	2:25	0:00	0:00	0:00	0:00	2:25
Docudrama	0	6	5	0	0	11	0:00	0:00	0:00	0:00	0:00	0:00
Others	5	6	5	0	0	16	119:40	118:15	32:55	0:00	0:00	270:50
Total	43	50	26	17	19	155	1431:15	1299:25	416:05	418:30	1296:55	4862:10

Source: Kantar Ibope Media - Obitel Brazil

Table 2 shows the evolutionary dynamics of brand new national productions, over the last five years, through the number of titles and hours.

The COVID-19 pandemic led to a sudden change in the years 2020 and 2021. Before the pandemic, the Brazilian productivity average was of 45.3 titles/year. We are still far from this score, but in 2022 there was an increase in brand new content production. This shows the country’s ability to regain its fiction productive power and its chances of growth in the coming years. The increase in the number of hours produced explains this hopeful path. We are again approaching the pre-pandemic average,

which was 1,346 hours/year, producing 1,296 hours/year in 2022, compared to 418 hours/year in 2021, thanks to the large number of brand new national telenovelas (11), amounting to a 210 %-increase.

Regarding format trends, in recent years we have seen the emergence of television series in relation to telenovelas, which have been growing steadily since 2018. However, in 2022, the number of brand new telenovelas titles was higher than that of series, which had not happened since 2017. In the last yearbook, we highlighted a serialization that has been transforming Brazilian television fiction, as well as how far would the Brazilian taste for short narratives, considering the telenovela culture found in the country. Considering the 57%-increase in the number of new telenovelas and the 22% decrease in new series, is it time to rethink this? Is this transformation still a consequence of post-pandemic, when telenovelas show to be more prepared for a resumption than series? Or, will we return to the trend of the past years before pandemic, when series were in greater number? This issue deserves attention and will continue to be debated among us.

Table 3. Premiere fictions aired in 2022: Countries of origin

Countries	Titles	%	Hours	%
NATIONAL (total)	19	70	1296:55	81
OBITEL COUNTRIES (total)	8	30	313:20	19
Argentina	0	0	0:00	0
Brazil	19	70	1296:55	81
Chile	0	0	0:00	0
Colombia	0	0	0:00	0
Ecuador	0	0	0:00	0
Spain	0	0	0:00	0
USA (Hispanic production)	1	4	5:00	0
Mexico	5	19	259:00	16
Peru	0	0	0:00	0
Portugal	2	7	49:20	3
Uruguay	0	0	0:00	0
Venezuela	0	0	0:00	0
CO-PRODUCTIONS (total)	0	0	0:00	0
National Co-productions	0	0	0:00	0
Obitel Countries Co-productions	0	0	0:00	0
TOTAL	27	100	1610:10	100

Source: Kantar Ibope Media – Obitel Brazil

Following the post-pandemic transition scenario, premiere fiction in Brazil grew as a whole, with the number of Ibero-American productions increasing by 33%. Unlike the fall of the previous year, the number of Brazilian productions increased. The Ibero-American premieres kept the mark of 26% of the total number of titles released. The nationality of the imported productions remained similar to that

of previous years. Five of them were Mexican, and two were Portuguese; however, none of them were American, which recorded one premiere in 2022. Co-productions in the Obitel region continue to not happen.

Table 4. National and Ibero-American fiction formats aired in 2022

Format	Titles				Hours			
	National	%	Ibero-American	%	National	%	Ibero-American	%
Telenovela	11	57,9	7	87,5	1187:25	91,6	308:10	98,4
Series	7	36,8	1	12,5	97:30	7,5	5:00	1,6
Miniseries	1	5,3	0	0,0	12:00	0,9	0:00	0,0
Telefilm	0	0,0	0	0,0	0:00	0,0	0:00	0,0
Single-Episode	0	0,0	0	0,0	0:00	0,0	0:00	0,0
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	19	100,0	8	100	1.296:55	100,0	313:10	100,0

Source: Kantar Ibope Media – Obitel Brazil

In 2022, the long seriality format makes up the vast majority of unpublished fictions, both Brazilian and Ibero-American, representing 66.6% of the total number of titles. The number of imported telenovelas increased by 40% from 2021 (5) to 2022 (7), a year when there was also an imported series. The diversification in the formats of the productions followed low, as it was in 2021, with an absence of units, docudramas, and telefilms.

Table 5: The 10 most watched titles in 2022

Titles		Channel	Country of Production	Format/Genre	Chapters in 2022	Slot	Rating	Share
1	<i>Pantanal</i>	Globo	Brazil	Telenovela/Drama	167	Prime Time	28,9	48,2
2	<i>Travessia</i>	Globo	Brazil	Telenovela/Drama	72	Prime Time	23,1	40,8
3	<i>Um Lugar Ao Sol</i>	Globo	Brazil	Telenovela/Drama	72	Prime Time	22,0	37,2
4	<i>Quanto Mais Vida, Melhor</i>	Globo	Brazil	Telenovela/ Romantic Comedy	126	Prime Time	21,1	36,9
5	<i>Cara e Coragem</i>	Globo	Brazil	Telenovela/ Romantic Comedy	186	Prime Time	21,0	36,2
6	<i>Mar do Sertão</i>	Globo	Brazil	Telenovela/ Romantic Comedy	113	Prime Time	20,7	38,8
7	<i>Além da Ilusão</i>	Globo	Brazil	Telenovela/Drama	167	Prime Time	20,1	37,5
8	<i>Nos Tempos do Imperador</i>	Globo	Brazil	Telenovela/Drama	29	Prime Time	17,6	34,2
9	<i>Filhas de Eva - 1ª temporada</i>	Globo	Brazil	Serie/Drama	12	Prime Time	17,4	34,6
10	<i>Cine Holliúdy - 2ª temporada</i>	Globo	Brazil	Series/Comedy	11	Prime Time	17,2	35,1
Total of national titles: 10				Foreign original screenplays: 0				
100%				0%				

Source: Kantar Ibope Media– Obitel Brazil

In the list of the ten most watched titles of the year, the consequences of the transition from the pandemic to the post-pandemic becomes explicit: From a year with a majority of rerun titles, we move to a year with a list of only brand-new titles. In 2020, there were six reruns among the top ten, and in 2021 the number grew to seven. In 2022, in addition to all the titles being new, we had another format besides telenovelas in the ranking again. The series *Filhas de Eva* (2022) and *Cine Holliudy* (2022) took the ninth and tenth positions, respectively. For one more year, all of the most viewed productions were produced by TV Globo.

Nevertheless, there was a drop in the ratings compared to the previous year. *Pantanal* (2022) achieved 28.9 audience points, while *Amor de Mãe*, first place in 2021, achieved 30.9 points²⁰. From the second place on, the drop was more significant: *Travessia* (2022) achieved only 23.1 points; last year, only from the sixth place on was a number close to this ever registered (a rating of 22). In 2021, the last four positions registered *the lowest ratings* within the historical series of Obitel, with an average of 20.5 points. In 2022, the average of the last four titles in *the top ten* was even lower, 18 points. A hypothesis that could explain this general drop is that the public preferred to resume other leisure options because of most pandemic restrictions were lifted.

All of 2022's top ten shows were aired at prime time. As for genres, 60% of them are dramas and 40% of them are comedies. There was an increase in the latter compared to the previous year.

²⁰ Despite the difficulty in reaching pre-pandemic ratings, in 2022 the *Pantanal* telenovela was a ratings phenomenon. The fact that the ratings of 2021's *Amor de Mãe* were higher should be considered atypical because it was divided into two parts: the first one was aired in early 2021, and then it was interrupted due to the pandemic; the second one was aired in 2022.

**Table 6: Audience profile of the 10 most watched titles:
Genre, socioeconomic level, and age group**

Title		Chann el	Genre %		Socioeconomic level %		
			Women	Men	AB	C	DE
1	<i>Pantanal</i>	Globo	60.8	39.2	33.0	48.5	18.5
2	<i>Travessia</i>	Globo	62.7	37.3	31.2	48.7	20.0
3	<i>Um Lugar Ao Sol</i>	Globo	61.8	38.2	33.6	47.9	18.5
4	<i>Quanto Mais Vida, Melhor</i>	Globo	63.2	36.8	29.9	48.4	21.6
5	<i>Cara e Coragem</i>	Globo	63.1	36.9	28.8	48.8	22.4
6	<i>Mar do Sertão</i>	Globo	63.4	36.6	28.5	49.0	22.5
7	<i>Além da Ilusão</i>	Globo	64.6	35.4	30.3	48.4	21.3
8	<i>Nos Tempos do Imperador</i>	Globo	65.0	35.0	30.8	47.9	21.3
9	<i>Filhas de Eva (season 1)</i>	Globo	62.8	37.2	32.3	49.4	18.3
10	<i>Cine Holliudy (season 2)</i>	Globo	60.2	39.8	32.2	47.8	20.0

Title		Age Group					
		4 a 11	12 a 17	18 a 24	25 a 34	35 a 49	50+
1	<i>Pantanal</i>	4,5	3,6	5,5	12,3	24,9	49,3
2	<i>Travessia</i>	4,4	3,6	5,2	12,1	25,1	49,7
3	<i>Um Lugar Ao Sol</i>	4,5	4,0	6,0	12,5	25,2	47,8
4	<i>Quanto Mais Vida, Melhor</i>	5,3	4,3	5,7	12,1	24,6	48,0
5	<i>Cara e Coragem</i>	5,0	3,8	5,4	12,0	24,3	49,7
6	<i>Mar do Sertão</i>	4,4	3,5	5,1	11,0	23,6	52,4
7	<i>Além da Ilusão</i>	4,7	3,7	5,5	11,4	23,1	51,6
8	<i>Nos Tempos do Imperador</i>	5,4	4,1	5,9	11,4	22,9	50,4
9	<i>Filhas de Eva- (season one)</i>	4,3	4,0	6,0	13,0	25,2	47,5
10	<i>Cine Holliúdy – (season two)</i>	4,6	4,2	5,6	12,8	26,2	46,6

Source: Kantar Ibope Media

The female audience was much higher than that of males in 2022. In all of the most watched shows, the female audience was above 60%, while the male audience decreased and did not surpass the 40% mark for any shows, as had been recorded in previous years. Females continue to comprise the highest audience percentages in 6 p.m. and 7 p.m. telenovelas. Among the favorite male audience’s fictions are the high prime time shows, such as the 9 p.m. telenovelas and series *Cine Holliudy*, aired after 10 p.m. this year.

Class C remains the largest top-10 audience, with very similar ratings at all times. *Mar do Sertão* and *Filhas de Eva* were the most watched. The DE class maintains its preference for romance and comedy for another year. *Mar do Sertão* and *Cara e Coragem* among the most watched. Among the AB class there was a general drop in the audience, with the title most seen being *Um Lugar ao Sol*, representing 33.6% of the total. This drop among the privileged classes reinforces the hypothesis that many

of those who have purchasing power have opted to watch streaming channels or do other leisure activities outside their homes.

Regarding age groups, the audience over 50 years was, once again, the one that watched fictions the most, especially the 6 PM telenovelas. The three shows in this time range were the ones they watched the most. And, unlike previous years, the 50-year-old or older audience was the largest in all top-10 shows. The audience between 39 and 49 years was among the largest audience of two series.

With the post-pandemic transition, 2022 was a year of true renewal of the productions and new releases of serial fiction in Brazil. Broadcast television remains the public's favorite, surpassing streaming platforms, which is discussed in the next topic. TV Globo maintains its dominant position. It produced the 10 most watched shows of the year. In Brazil, broadcast television keeps its strength in the audiovisual field, especially in fiction.

3. VoD Monitoring 2022

In 2022, the advances in consolidating the Video on Demand market (VoD) in Brazil deserve highlight. It gained ground alongside digital literacy, the expansion of 4G technology, the strengthening of new players in the country, and the strong expansion of the Brazilian Globoplay platform. The national market has been watching the streaming competition, the search for new consumers with the adoption of different productive and marketing strategies and consequent competition among the main platforms (Netflix, Prime Video, Globoplay, HBO Max, Star+, Disney+, and Apple TV+).

3.1 VoD platform market in 2022

According to an Ancine report entitled *Overview of the Demand Video Market in Brazil-2022*²¹, among the 20 countries surveyed in Latin America²², Brazil has the largest number of Video on Demand services, with 59 available platforms. The high supply is accompanied by better conditions for consumers, since the average prices per monthly subscription of VoD services in Brazil is the lowest among the countries surveyed: about US\$ 5.64 or R\$ 26.36 compared to US\$ 7.23 or R\$ 33.79 in the other countries.

3.2 Offer of national VoD platforms in 2022

The most watched streaming platforms by Brazilians in 2022 are: Netflix (30%), followed by Prime Video (21%), Disney+ (15%), HBO Max (11%), Globoplay (8%)

²¹ <http://bitly.ws/FxSS>. Almost all of this data comes from this report.

²² The countries are: Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Cuba, El Salvador, Ecuador, Guatemala, Honduras, Mexico, Nicaragua, Panama, Paraguay, Peru, Puerto Rico, Dominican Republic, Uruguay and Venezuela.

and STAR+ (6%).²³ By merging Disney's two streaming platforms (Disney+ and STAR+), it reaches the same audience share as Amazon Prime.

In a more competitive scenario and with a decrease in membership, Netflix launched a new "Basic with Ads" subscription plan, with economic advantages but less content, subject to advertising before and after its display. Globoplay also deserves highlight; It continues to expand and conquer the market, with phenomena such as the release of the original Telenovela for VoD, *Todas as Flores*, and the broadcast of *Pantanal*, a telenovela aired on TV Globo. The platform experienced a growth of 27% in its subscriber base, and a growth of over 30% in its revenue.²⁴

Regarding the shows it offers, after two years in which the national productions led the releases in streaming, the premiere of Ibero-American titles (73) surpassed the Brazilian ones again (49). This change indicates the consolidation of Ibero-American cultural products in the local scenario, which is mainly associated with the growth and launches of these countries in the portfolios of Netflix, Globoplay and STAR+. The great interest of Globoplay interest in Portuguese products is also highlighted: While in 2021 no title of this country debuted on this platform, there were 10 Portuguese releases in 2022. Of these, six are telenovelas, popularized through the Brazilian productions exported by TV Globo.

3.3 VoD analysis in 2022: national premiere fiction and co-productions

In 2022, the national launches in VoD in Brazil were as follows.

²³ According to German streaming guide *JustWatch*, based on data collected in the last quarter of 2022. See <https://www.justwatch.com>

²⁴ <http://bitly.ws/FxTm>

Table 7. National fictions and co-productions aired in Brazil in VoD in 2022

National debut fictions in VoD	Obitel Countries premiere co-productions in VoD
Globoplay - 34 fictions 1. <i>A Casa das Sete Mulheres</i> (Miniseries) – Season 1 2. <i>Alma Gêmea</i> (telenovela) 3. <i>América</i> (telenovela) 4. <i>Amor Com Amor Se Paga</i> (telenovela) 5. <i>Anjo Mau</i> (telenovela) 6. <i>Anos Dourados</i> (Miniseries) – Season 1 7. <i>Arcanjo Renegado</i> (Series) Season 2 8. <i>Belíssima</i> (telenovela) 9. <i>Caminho das Índias</i> (telenovela) 10. <i>Celebridade</i> (telenovela) 11. <i>Da Cor do Pecado</i> (telenovela) 12. <i>Desalma</i> (Series) – Season 2 13. <i>Encantado's</i> (Series)-Season1 14. <i>Guerra dos Sexos</i> (telenovela) 15. <i>Lua Cheia de Amor</i> (telenovela) 16. <i>Malhação 1996</i> (Telenovela) 17. <i>Malhação 2009</i> (Telenovela) 18. <i>O Beijo do Vampiro</i> (telenovela) 19. <i>Os Últimos Dias de Gilda</i> (Miniseries) – Season 1. 20. <i>Páginas da Vida</i> (telenovela) 21. <i>Pão-Pão, Beijo-Beijo</i> (telenovela) 22. <i>Paraíso Tropical</i> (telenovela) 23. <i>Pecado Capital</i> (Telenovela) 24. <i>Pedra sobre Pedra</i> (telenovela) 25. <i>Por Amor</i> (telenovela) 26. <i>Quatro por Quatro</i> (telenovela) 27. <i>Que Rei Sou Eu?</i> (telenovela) 28. <i>Rensga Hits!</i> (Series) - Season 1 29. <i>Sob Pressão</i>(Series)-Season 5 30. <i>Sonho Meu</i> (telenovela) 31. <i>Tropicaliente</i> (telenovela) 32. <i>Todas as Flores</i> - (telenovela) 33. <i>Turma da Mônica</i> - A Série (Series) – Season 1 34. <i>Um Anjo Caiu do Céu</i> (Telenovela)	Netflix - 4 fictions 1. <i>Diario de un Gigoló</i> (Series, Argentina and USA) - Season 1 2. <i>El Rey, Vicente Fernandez</i> (Series, Mexico and Colombia) - Season 1 3. <i>Malverde: El Santo Patron</i> (Series, USA and Mexico) – Season 1 4. <i>Guillermo Del Toro's Cabinet of Curiosities</i> (Series, USA and Mexico) - Season 1 STAR+- 1 fiction 1. <i>Lynch</i> (Series, Colombia, Mexico and Argentina) - Season 2 Prime Video - 1 fiction 1. <i>Operación Marea Negra</i> (Series, Spain, Portugal and Brazil) - Season 1

Netflix - 8 fictions 1. <i>A Sogra Que Te Pariu</i> (Series) - Season 1 2. <i>Bom Dia, Verônica</i> (Series) - Season 2 3. <i>De Volta aos 15</i> (Series) Season 1 4. <i>Maldivas</i> (Series) – Season 1 5. <i>Nada Suspeitos</i> (Series) - Season 1 6. <i>Sintonia</i> (Series) - Season 3 7. <i>Só se For por Amor</i> (Series) - Season 1 8. <i>Temporada de Verão</i> (Series) - Season 1 HBO Max – 2 fictions 1. <i>No Mundo da Luna</i> (Series) - Season 1 2. <i>Pico da Neblina</i> (Series) - Season 2 STAR+ - 2 fictions 1. <i>Não foi Minha Culpa: Brazil</i> (Series) - Season 1 2. <i>O Rei da TV</i> (Series)- Season 1 Disney+ - 1 fiction 1. <i>Tudo Igual... SQN</i> (series) - Season 1 Paramount+ - 1 fiction 1. <i>As Seguidoras</i> (Series) - Season 1 Prime Video - 1fiction 1. <i>Lov3</i> (Series) - Season 1	
Total: 49 fictions	Total: 6 fictions
Final Total: 55 fictions	

Source: Orbitel Brazil

Globoplay remained the leader of national releases, with 34 shows, followed by Netflix (8), HBO Max (2), STAR+ (2), Disney+ (1), Paramount+ (1), and Prime Video (1). Its catalog features new telenovelas, as *Todas as Flores* and “classic” ones, from decades ago, indicating the strength of the genre. It is worth noting how heavily the platform has invested in different strategies to reach new audiences and retain old ones. In the case of *Todas as Flores*, for example, a five-chapter block release every Wednesday was adopted. This model is similar to the fifth season of *Sob Pressão*, with weekly two-chapter blocks. This strategy enabled the platform to promote a

marathon experience (typical of streaming platforms). It also made it possible for this show to be watched for a long period (a standard that alludes to how telenovelas are aired on broadcast TV), as well as to retain old subscriptions.

Regarding the other platforms, attention is drawn to the annual growth of Brazilian premieres on Netflix, from two titles to eight, in addition to a sharp drop in national releases on Prime Video, which ranged from 12 to a debut. Many of the released shows feature former TV Globo actors. Due to structural changes, they are no longer TV Globo exclusive actors. They started working per project at TV Globo, or were hired by foreign streaming platforms²⁵, which profit from their visibility and expand their audiences.

Regarding the productions from the Obitel countries, the number of co-productions jumped from one to six, suggesting a promising trend of economic and cultural exchanges among themselves. This year one of the titles co-produced is from Brazil: The first season of series *Operación Marea Negra*, in co-production with Spain and Portugal. All co-productions are series, with five in their first season, in a bet on the growth of Ibero-American productions.

3.4 Narrative characteristics of VoD in 2022

As it happens on broadcast channels, *Todas as Flores* ended each chapter at the climax, arousing the interest of the audience for the next episode and stimulating the habit of binge-watch five chapters. In addition, the fifth and final chapter of each block ended with an even more dramatic hook in order to draw the viewer to the following week. This distribution strategy also increased time spent on platforms, one of the metrics for marketing advertising spaces in VoDs.

Considered the first telenovela produced strictly for Globoplay, *Todas as Flores* was a success among the public and critics. It brought changes in seriality: it had 85 chapters (of average one hour each), half of what is the usual in a telenovela, approaching the serial format, and a narration in short dramatic arches closed a *plot* practically in the same chapter. The fusion of genres (drama, comedy, suspense, crime, eroticism) allied with themes such as classism, business disputes, human trafficking, popular fashion/luxury.

The affirmation of identity, representativeness and diversity was one of the outstanding characteristic of this show, which dealt with capacitism and presented blind protagonist Maira (Sophie Charlotte), as well as several other people with visual impairment, as excellent collaborators of an industry.

Another national fiction highlight produced for VoD was series *Encantado's* (Globoplay, 2022). Written by graduates of a Script Workshop for Black Authors of TV Globo, this series takes place in a market that, at night, becomes a samba

²⁵ These changes in the market of actors due to dismissals from Globo and its new business model are discussed in the 2022 Obitel Yearbook.

school called “Joia do Encantado”, where the dramas experienced by their characters are presented. Starred by blacks, *Encantado*’s talks about their traditions, faith, sociability and everyday life, while giving visibility to their dramas, affections and dreams. In a country marked by diversity, the series is an opportunity for millions of Brazilians to recognize themselves in telefiction and create new imaginaries about themselves, about the other and about Brazil itself, a nation not as white as it is usually represented.

4. Interactivity and participation of audiences

On digital platforms, 2022 was characterized by an active participation of audiences. The biggest phenomenon of interactivity was telenovela *Pantanal*; for this reason, we define it as a *media event*²⁶. Since its beginning, it made families gather in front of TV sets. It was the topic of conversation in variety shows and informal conversations; it was also one of the most commented topics on social media and stimulated Brazilians’ creative talent through numerous memes. Characters such as “José Leôncio” (Renato Goés/Marcos Palmeira), “Zaqueu” (Silvero Pereira) and “Maria Bruaca” (Isabel Teixeira) became close to audiences by amusing and moving them.

In addition to narrative quality and production, *Pantanal*’s success in social networks was the result of a strategic communication planning of Grupo Globo to engage audiences. Jenkins (2008) names this a “social interactivity promoted by industry.” A year and a half prior to the telenovela premiere, variety/journalism show *Fantástico* had announced that this telenovela would undergo a remake. It was a TV drama classic produced by extinct TV Manchete in 1990. From that date on, old and new fans mobilized and created the first speculations.

The launch campaign yielded good results. In the broadcast TV schedule, journalistic and entertainment content promoted engagement. Having been a success of audience and profitability, its interactivity rates were also high. According to data from Twitter, between the first and last chapter, more than 3 million tweets were posted²⁷, a fact verified in the recurrence of mentions in *trending topics*. The protagonist character “Juma” was the most cited and *the hashtag* #Juve, symbolizing the shipping of the couple “Juma and Jove”, was remarkable.

As to the “social participation promoted by audiences” (JENKINS, 2008), a highlight was the production of content by TikTokers who engaged, created fan communities, and popularized such productions using a mostly comical tone. Characters from *Pantanal* and *All Flowers* were reinterpreted by their content creators, resulting in memes that were often replicated on Twitter, Instagram and Facebook. The so-called *react videos*, where in which users react to a scene, were also recurrent in the

²⁶ For Mulgan (1990), a *media event* is a media phenomenon linked to a certain time and context, whose repercussion is responsible for generating social commotion and unfolding in multiple languages, in the most diverse sectors of society.

²⁷ bit.ly/3MvtC5L

novel approach. TikTok offered a creative innovation of audience participation – a filter of character “Chiara” (Jade Picon), of telenovela *Travessia*²⁸. It enabled users to reproduce this character’s facial features.

In WhatsApp, *Pantanal* gained prominence through stickers, image-format content that can be saved and shared. In addition to facial expressions used to mention sensations, images with jargon were intensely shared, such as the “Pantanês” vocabulary²⁹: “ara”, “reiva”, “diacho” and “rupiei”.

However, the content produced on these platforms was not only comedic. The discussions stirred by *Pantanal*, *Travessia*, and *Todas as Flores*, such as identity and human rights guidelines, were discussed on social media. This deepened the conversation, adding new layers of meanings to it, and pointing out that fiction found a match in real life. In this context, a highlight may be character “Maria Bruaca”, a woman harassed by her husband. Throughout the plot, she frees herself from submission to a sexist relationship and, in doing so, inspired internet users from all over the country and had viewers make posts reporting similar experiences.

5. Highlights of the year 2022

The recovery of the stability in shoots promoted an increase in TV fiction releases in both broadcast TV and streaming platforms. Among them, the most prominent of the year were three works: The *Pantanal* remake, telenovela *Travessia*, written by consecrated author Gloria Perez, and *Todas as Flores*, by João Emmanuel Carneiro, Globo’s bet for its streaming platform.

5.1. The great success of the remake of *Pantanal*

After 32 years of airing on TV Manchete in 1990, *Pantanal* got a remake and was produced and aired by TV Globo (28/03 to 07/10/2022) at 9 p.m. The original novel, written by Benedito Ruy Barbosa, had 216 chapters, and the remake written by his grandson, Bruno Luperi, 167, that is, 23% fewer chapters.

TV Globo made use of different approaches for promotion and public engagement. Until its debut, the largest 9 p.m. telenovela campaign ever was devised by the broadcaster. It was comprised of 37 different promotional pieces and more than 260 insertions in the programming. The first chapter was presented at the *Big Brother Brasil* reality show house using 8K-image technology and immersive sound. In addition, this telenovela promotion was present in all TV Globo programming, including the online environment, with the creation of exclusive content.

The plot portrays a family saga, having love as a guiding thread and nature as a protagonist. The story is centered in old Joventino and his son, José Leôncio. Life as

²⁸ *Travessia* was the TV Globo prime time telenovela that preceded *the Pantanal*, with very low ratings for the schedule and much criticized by the audience on social media.

²⁹ Satire to the mode of talking about the characters of *Pantanal*. See bit.ly/3qcqpAB

an entourage pawn takes them to the Pantanal region, where the father learns that nature can do more than man.

In the first phase, after Joventino's mysterious disappearance, José Leôncio falls in love with Madeleine, marries her, and Jove is born from this love. Missing the urban life and its comforts, Madeleine flees from the Pantanal carrying her baby. The boy grows up far from his father, who found himself unable to fight for custody of his son.

The second phase of this telenovela begins 20 years later, when Jove goes after José Leôncio after he discovers that his father is alive. Despite the joy of their reunion, father and son are confronted by behavioral and cultural differences. In addition to this troubled relationship, the novel presents remarkable characters and stories, which represent the people, Brazilian culture and mysticism, such as Juma Marruá, wild woman who turns into jaguar, the Velho do Rio ("The River Elder"), a healer and defender of nature who becomes a sucuri snake, and Trindade, a guitar player who has pact with the "cramulhão" (humorous popular name for the devil).

The *Pantanal* remake touched on several meanings of citizenship (CANCLINI, 1995) and added either embryonic or non-existent conversations to its original version. This remake presented updates in social achievements of the last 30 years, and addressed challenges that were intensified during this time. It also discussed issues on the public sphere agenda, such as gender, sexuality, environmental preservation, and the agribusiness.

Pantanal was a media phenomenon, a *media event*, that is, an event linked to a time, which touches on important issues of a given moment. The update in the way certain debates were presented and the addition of new themes were fundamental to its success, both among the public that already knew it and among a new generation of viewers. In turn, this reaffirms our theses on telenovela as a *narrative of the nation* (LOPES, 2003) and as a *communicative resource* (LOPES, 2009)³⁰.

5.2. Broadcast TV, streaming, and telenovelas: *Travessia* and *Todas as Flores*

As we said, after *Pantanal*, Globo invested in two productions: one focused on broadcast TV, authored by Gloria Perez, and another for its streaming platform, Globoplay, written by João Emanuel Carneiro.

5.2.1. The failure of *Travessia*, at TV Globo's prime time

João Emanuel Carneiro was the author expected to succeed *Pantanal* on open TV but was replaced by Gloria Perez. We raised some possibilities for this movement. The first one is Perez's success with the public. Gloria Perez is known for being able

³⁰ These two concepts cannot be forgotten. We have been using them in our studies at CETVN, Obitel and Obitel Brazil over time. Within the latter, we were contemplated, through the "Network Projects - Public Policies for Human and Social Development - Pro Humanities" of CNPq, with the project "Brazilian Television Fiction as a resource for promoting citizenship".

to establish a dialogue with the audience and make changes to the text, keeping the telenovela as an “open work.” Another Perez’s characteristic is her way of addressing problems of both the upper class and the lower middle class. She presents popular characters who usually say catchphrases that conquer Brazil. Her last success, *A Força do Querer* (Globo, 2017), featured themes such as gender transition and obesity. It stirred several discussions in the mainstream media and drew sponsors and a high audience (ABRÃO, 2021).

If Perez is considered an author who works with everyday and controversial themes, João Emanuel Carneiro is known for suspense stories that are full of twists, such as *A Favorita* (Globo, 2008) and *Avenida Brasil* (Globo, 2012). Thus, choosing Perez for broadcast TV suggests a shift of focus on the most popular layers, while Carneiro’s presence in streaming media is directed to a smaller, select audience, who has been following the trend of binge-watching television series.

Replacing a plot of immense success is a great challenge because it demands a story that gets viewers hooked right in the first chapters; otherwise, ratings will quickly drop. Gloria Perez tried some strategies to obtain the immediate approval of those who had been watching *Pantanal*, such as: 1) the return of some characters of *Salve Jorge* (Globo, 2015); 2) the deep fake controversy, responsible for the separation of the 3) Brisa couple (Lucy Alves) and Ari (Chay Suede), as well as 4) Chiara (Jade Picon), who would form the love triangle of the plot. The choice of Jade Picon, a digital influencer who participated in *Big Brother Brasil 2022*, was a bet to engage younger audiences.

However, in the first chapter, the telenovela suffered criticism for the absence of chemistry among the protagonists, for the poor performance of the influencer and, especially, for the excess of violence in the scenes starring Guerra (Humberto Martins), Débora (Grazi Massafera) and Moretti (Rodrigo Lombardi). The attempt of femicide in the first chapter, with the presence of a firearm, coincided with the 2022 election runoff, disputed between Lula and Bolsonaro – the latter, a defender of the population’s right to have guns and responsible for arm release decrees. In 2022, there was a 5.5% increase in the rate of femicide in Brazil. If the runoff signaled possible problems with the audience given the mandatory placement of the electoral time, the non-prediction that certain discourses inserted in the plot would nurture polarized political discussions. Thus, the elections directly affected *Travessia*: from the context to the text, this telenovela seemed to highlight the author’s political position in favor of Bolsonaro³¹. In addition, there were major controversies in the media between the author and one of the telenovela actresses³².

The theme of *deep fake* disappeared throughout the plot and presented a growing difficulty in attracting the public. The telenovela eventually reached the second

³¹ <https://www1.folha.uol.com.br/ilustrada/2022/10/entenda-polemica-de-gloria-perez-e-bolsonaro-que-e-idolo-de-guilherme-de-padua.shtml>

³² <https://rd1.com.br/gloria-perez-toma-atitude-com-cassia-kis-apos-polemicas-em-travessia/>

lowest audience rating of a 9 p.m. telenovela and it saw a reduction in its number of chapters. The socio-educational themes, a Perez's trademark were forsaken at the beginning of *Travessia* but were included at its end as an attempt to save the story: youngsters' dependence of videogames, pedophilia, capacitism, were some of the issues featured in the narrative.

At the same time, in Globoplay, *Todas as Flores*, conquered the spotlight and attention of different audiences.

5.2.2. *Todas as Flores*, a huge streaming success

Todas as Flores debuted on October 19th, 2022, with the strategy of launching five-episode blocks every week. This telenovela was divided into two parts: the first one had 45 chapters, which were aired in 2022, while the second one had another 40 chapters, which were released in 2023, totalizing 85 chapters. The work would have had 150 chapters if it had been aired on broadcast TV³³, but its shorter duration on *streaming* gave it a series feature, division into two seasons, an agile narrative and narrative arches coinciding with intense hooks, just like series episodes.

This experiment of new serialization on a telenovela proved successful, and *Todas as Flores* broke rating records on Globoplay. Since its debut, the work of João Emanuel Carneiro has reached the first place on the list of “The Ten Most Viewed”. Its contents were also an important part of this success, presenting a central protagonist with visual disability for the first time, charismatic villains, and many twists typical of the author's writing style (see topic 3.4).

The unprecedented fact that Globo aired two prime-time telenovelas simultaneously caught the attention of the media and social media, who questioned why that the “better” telenovela (*Todas as Flores*) was available precisely on the paid platform. Due to its huge success, it will be aired on broadcast TV in 2023.

6. Theme of the Year: Independent producers and the internationalization of television fiction production in Ibero- America

In this Theme of the Year, we start from framing independent audiovisual within *creative economy*, which produces cultural goods and services that carry cultural and economic values. Culture must be regarded as a strategic element of development policies. The creative economy is associated with economic growth and innovation and, consequently, the development of emerging countries. This may trigger a virtuous circle between economy, culture, science, and technology. We may say culture is *operationalized* by creative industries³⁴. It results from broader social

³³ <https://bit.ly/3IBSUOw>

³⁴ Firjan (2022) has periodically carried out a mapping of the creative industry in Brazil, splitting it into four major creative areas and 13 creative segments, namely: 1) Consumption: Design, Architecture, Fashion, Advertising & Marketing; 2) Media: Editorial and Audiovisual; 3) Culture: Heritage

transformations such as economic globalization and global culture. It expresses an interrelationship between creative process and market demand, with emphasis on the importance of intellectual capital - technology is very relevant, but in the audiovisual sector it only exists in the relationship with the creative process of writing and direction.

This concept helps us present an overview of the TV fiction production made by independent Brazilian producers³⁵, especially in the post-pandemic Covid-19 context.

In the last 15 years, the decentralization of public promotion notices; the Pay TV law (12.485/11); and the entry of new players into the market (VoD platforms) have greatly boosted the growth of independent audiovisual in the country. It gained a prominent position within the new media ecology. This law caused a real explosion in the Brazilian audiovisual sector from 2012 onwards.

This sector generates about R\$ 25 billion (5 billion USD) for the Brazilian GDP and indirectly impacts the economy by generating jobs and taxes. In the end, it may generate nearly R\$ 55 billion (11 billion USD)³⁶ for GDP – there are 657 thousand direct jobs, indirect and induced, or 126.6 thousand considering direct generation alone.

In 2018, 69% of Brazilian fiction on Broadcast TV, Pay TV and VoD were from independent producers. On the other hand, new challenges arose with the pandemic, the dismantle of the Ministry of Culture, the consequent extinction of public notices, the attempts to change the law of Pay TV, and, more recently, the struggles for regulating streaming platforms in the country.

In 2022, there were 9,113 independent production companies registered in Ancine. This amounts to a 14.13%-decrease compared to 2021, when there were 9,503 independent production companies. However, these numbers are distributed in a deeply unequal way across regions - Southeast: 66.5%; South: 12.4%; Northeast: 11.9%; Center-West: 6.2%; North: 3.0%³⁷. The Southeast region has twice as many producers as the sum of all the other four regions.

As mentioned above, in the last five years, the Brazilian audiovisual sector was deeply affected by government dismantling practices and the COVID-19 pandemic (LOPES; SANTOS, 2021; LOPES; ABRÃO, 2022). Without public notices from the FSA (Audiovisual Sector Fund), independent producers had to reinvent themselves to remain in the market while many of them were forced to end their activities.

and the Arts, Music, Performing Arts and Cultural Expressions; 4) Technology: R&D, Biotechnology and ICT.

³⁵ Summarizing the Ancine definition, independent producers are companies owning all or most of the property rights on a work and have no direct or indirect link with other companies that transmit sound or image, whether they are broadcast or pay TV.

³⁶ Survey carried out by the Motion Pictures Association (MPA). See <https://bit.ly/438Ckhe>

³⁷ Ancine (2022)

In 2022, the brand new series broadcast by TV Globo are original Globoplay productions. On the other hand, the TV channel produced eight telenovelas this year. The Globo Group's strategy seemed increasingly adjusted to the set of platforms it has - broadcast TV, Pay TV, and VoD. It can co-produce series for its streaming platform alongside independent producers, and later release them on broadcast TV – as it was the case of *Sob Pressão* (in season 5 when this report was written), in co-production with *Conspiração Filmes*. On the other hand, TV Globo focuses on the production of telenovelas, made available in synchronous mode on Globoplay, such as *Pantanal* and *Travessia*. TV Record produced two new series and three telenovelas, all of them conceived by Casablanca Studios, an independent producer and partner. SBT produced only one telenovela in 2022, *Poliana Moça*, made available on Prime Video, with which it signed the licensing and co-production of telenovelas.

The large independent Brazilian producers are responsible for most streaming platform productions. Among them, O2, *Conspiração*, Glaz, and Moonshot deserve highlight. However, the largest volume of fictions comes from smaller companies, such as Primo Filmes and Raccord. This suggests that the platform market seeks diverse products – these have dealt with internal restructuring, layoffs and cuts since the suspension of the FSA in 2019 by the Bolsonaro government.

When funded by the FSA, the intellectual production of series remains with independent producers after it is aired on licensed channels. This allows them to sell them to other services, hence the importance of public funding.

Some producers specialize in pre- or post-production, while others participate in all stages. In many cases, a project is co-produced, whether with a TV channel, a platform, or among the producers themselves³⁸. This scenario is facilitated by the expansion of streaming platforms, which strengthened the audiovisual and created a global economic scale, enabling co-productions in several countries, as well as national product exports.

However, the internationalization of Brazilian audiovisual content is not recent. TV Globo was one of the pioneers in exporting telenovelas in the 1970s after the national market was consolidated (TONDATO, 1998). During the 1990s, it experienced a period of numerous exports that coincided with the inauguration in 1995 of the Projac (nowadays named Globo Studios). In the late 2000s, the presence of Portuguese actors in Brazilian telenovelas also began a way of establishing a dialogue

³⁸ Throughout this topic, we used data and findings from an ongoing research project entitled *Economia criativa do audiovisual brasileiro independente: o papel da criatividade e o impacto da inovação no cenário produtivo das séries televisivas nacionais: avaliação e propostas* (Creative economy of independent Brazilian audiovisual: The role of creativity and the impact of innovation on the production scenario of national television series: assessment and proposals). It presents a comparison between large, medium, and small independent producers in the regions of São Paulo-Rio de Janeiro and Northeast Brazil in the sense to understand the current operating conditions of these producers. The collected data were split into eight macro-categories: (1) History, Management and Business, (2) Financing, (3) Bolsonaro Government, (4) Pandemic, (5) Production and consumption, (6) Creativity, (7) Pandemic, (8) Regulation.

with Portugal, a great consumer of TV Globo products. From 2010 onwards, there has been a reverse flow: Brazilian actors move to Portugal to work for TVI and SIC, now major producers of this format.

With the arrival of *streaming* in Brazil, television fiction has become a highly demanded product. The companies that stand out most are those that have a larger, more diverse catalog and are constantly launching new content. In this “war of platforms” aggravated by the high volume of old and new subscribers, the independent producers are the most benefited companies, because they can license their products to different platforms and enter into co-production partnerships. The return of public funding in 2022 made headway for new and better prospects for Brazilian TV fiction production.

VoD platforms have led to the restructuring of business models, such as the exclusive hiring of artists by Globo, which has been closing long contracts to give space to contracts per work. In this way, several “global artists” were hired by platforms such as Netflix, HBO Max, among others. On the other hand, it has been announced that these streaming platforms are preparing to produce telenovelas with local teams and distribute them globally. New competition fronts have been emerging.

Finally, it seems that the telenovela remains the “narrative of the nation” (LOPES, 2009), but it has entered into a new scenario, that of the *streaming culture* (ARDITI, 2021). This has been changing the global audiovisual market, as well as the ways of watching and producing television fiction. Obitel is faced with the challenge of continuing to describing and discussing new objects and content, production and distribution strategies, as well as new habits and experiences of watching television. This occurs amidst an incessant growth in producing of new knowledge about Ibero-American television fiction.

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CHILE: THE SURVIVAL OF TELEVISION FICTION AT THE MERCY OF PRODUCTION COMPANIES¹

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Introduction

In many aspects, 2022 in Chile was a slow prolongation of 2021's post-pandemic, but with the pandemic already forgotten: the media attention was focused on politics (both for the change of government and for the continuity of the constituent process that emerged after the social unrest of 2019) and pay-TV continued its declining stagnation in subscribers and audience, greater than that of free-to-air television. In the latter, the leadership in audience and economic results was maintained by Mega and Chilevisión. The former continued to be the dominant -and almost solitary- actor in premiere fiction on free-to-air television, working hand in hand with independent production companies, a topic dealt with in depth in the last section of this report. In contrast to the analog world, the digital world (understood as connectivity, access and penetration of *streaming* platforms) enjoyed good health in 2022, although with little national premiere production in it.

The highlight of the year, in Aristotelian terms, is potency rather than act. Little was programmed for Korean television in 2022, and only towards the end of the year, but since it was not an anecdotal event, but a deliberate long-term strategy, it has an interesting transformational potential to anticipate.

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1. The Chilean Audiovisual Context in 2022

1.1 Free-to-air television in Chile

Table 1. National free-to-air television channels in Chile

Private channels (6)	Public channels (1)
Canal 13: Luksic Group (Chilean). Chilevisión (CHV): Paramount Global. Mega: Bethia Group (Chilean), Discovery Communications (27.5%). La Red: Albavisión Group. Telecanal: Inversiones Alfa Tres (linked to Albavisión). TV+: Media 23 (Chilean, 90%), Pontificia Universidad Católica de Valparaíso (10%).	Televisión Nacional de Chile (TVN), with advertising-only financing.
Total of channels: 7	

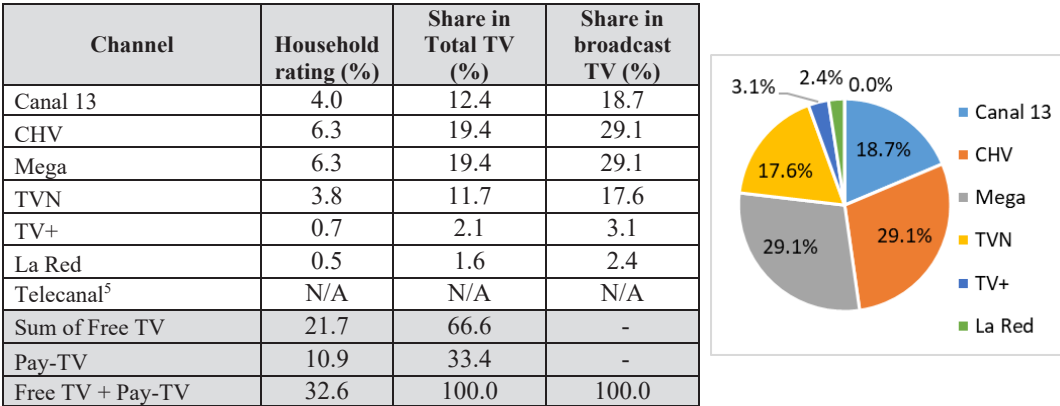
Source: Obitel Chile.

Both Mega and Chilevisión (CHV), the audience leaders, recorded profits for the second consecutive year in 2022, with US\$15.3 million and US\$23.6 million respectively³ . It should be recalled that CHV had losses for the previous eight years, during the entire period it belonged to Warner Media. In turn, Televisión Nacional de Chile (TVN), the public channel, for the third year managed to make a profit, although of a lower order than the two leading channels: US\$3.5 million. In contrast to these three cases, Canal 13 reported losses of US\$4.3 million, as did Telecanal with US\$0.8 million. In the case of La Red, the signal experienced a critical situation during 2022, with delays in the payment of salaries, but it is not possible to provide further information as its income statements are not available at the Financial Market Commission, the regulatory entity that concentrates this information.

Chile is lagging far behind with respect to digital terrestrial television. After successive postponements, the analog switch-off is scheduled for December 2024. Although traditional channels and other actors have made progress, both in infrastructure and content (mainly in non-fiction) it is a topic completely absent from the public agenda. Its contents are not included in this report.

³ At the 2022 average exchange rate reported by the Central Bank.

Figure 1. TV rating and share by station during 2022 ⁴

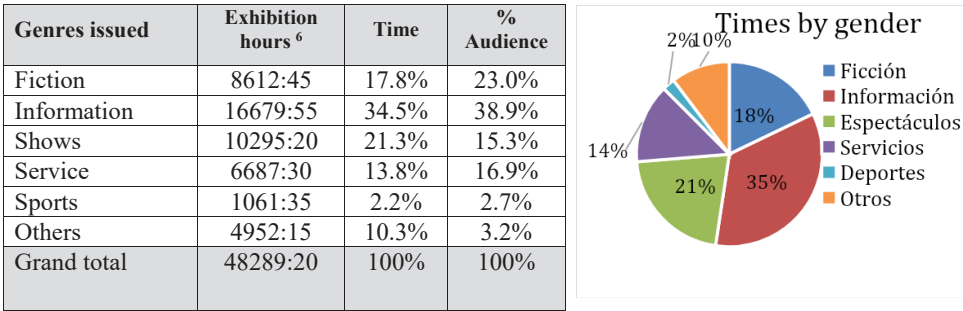


Source: Kantar IBOPE Media Chile - OBITEL Chile.

Graph 1 shows Mega and Chilevisión tied at 6.3 household *rating* points. Strictly speaking, Mega wins, but the difference appears at the third decimal point. Between 2014 and 2020, Mega clearly prevailed over the rest of the channels. Since 2021, this leadership is being challenged by CHV, which will also compete in evening fiction as of 2023.

The situation of Canal 13 and TVN is the opposite. Both, with 4% and 3.8% respectively, mark their lowest audience results since the *People Meter* audience measurement system began in Chile in 1992.

Figure 2. Genres and hours of TV programming during 2022



Source: Kantar IBOPE Media Chile - OBITEL Chile.

⁴ Graph 1 shows the data considering the 24 hours of the day. Sometimes, in the Chilean television industry, reference is made to the *television day*, which is the time from 7AM to 1AM. In this restricted time slot, the *rating* of free-to-air television is, on average, 24% higher than the one shown here and that of pay-TV is 16% higher.

⁵ Telecanal data are not included in graphs 1 and 2 since they are not being reported by Kantar Ibope Media. For the rest of the report, this is not relevant since it does not broadcast television fiction of Ibero-American origin, except for the occasional anecdotal exception.

⁶ Transmission times are shown rounded to five-minute intervals.

Between 2009 and 2017, television fiction always occupied more than 21% of screen time, reaching a maximum of 27% in 2016. This figure was broken in 2021, dropping to 16.9%, and fell again in 2022, reaching only 15.6%. The 17.8% shown in Chart 2 also includes theatrical cinema and animations. This decline is independent of the decrease in production reported in the following sections, since the table also includes reruns, Turkish fiction, and fiction of other origins.

The fact is that in Chile less fiction is being programmed in open television. This has been capitalized by information contents, which since 2019 have had a strong growth in participation. This shift from fiction to information can be probably explained as a combination of global and local factors. The global, the strength of *streaming* platforms in fiction. The local, the attention of the population in the news agenda first due to the so-called “social explosion” of 2019 and then the pandemic, the constituent process and the political contingency applied to various news focuses.

1.2 Pay-TV in 2022

The number of households subscribing to pay-TV doubled between 2010 and 2017. However, thereafter growth stagnated and even declined in some years. In December 2022, compared to the same month of 2021, the number of subscribers fell by 4% and it is observed that cable operators, as a retention strategy, offer access at discounted prices to *streaming* platforms (Subtel, 2023a). Even more telling than the decrease in subscribers is the decrease in audience. It decreased by 19% compared to 2021.

Table 2. Pay-TV channels in Chile

10 most watched pay-TV channels in Chile in 2022			
Channel	Genre	Origin	Home Rating ⁷
24 Horas	Information	Chile	0.46
CNN Chile	Information	Chile	0.37
Space	Fiction and +	Foreign	0.36
TNT Series	Fiction	Foreign	0.29
TNT Sport HD	Sports	Chile	0.29
AXN	Fiction	Foreign	0.29
Universal TV	Fiction	Foreign	0.24
Discovery H&H	Information	Foreign	0.23
ESPN	Sports	Chile	0.23
Cartoon Network	Children's	Foreign	0.22

Source: Kantar IBOPE Media Chile.

There are two striking facts in the list of the most watched signals on pay-TV. First, the consolidation of news channels as the most watched. Although there are other national channels that offer news content, 24 Horas and CNN Chile are the only ones dedicated exclusively to news, and both are the most watched.

⁷ Calculated over 24 hours a day.

The second fact is the inverse of the previous one: the children's channels that, years ago, dominated the most watched channels, tend to regress. In 2022, only Cartoon Network is in tenth place of the top 10 most watched channels. This phenomenon is probably attributable to the greater penetration of *streaming* platforms in said period and their wide offer of content aimed at children's audiences.

1.3 Sources of financing for the audiovisual sector

The main source of public funding for broadcast television comes from the fund of the National Television Council (CNTV), which each year calls for bids to allocate funds in various categories. In 2022 it distributed Ch\$4,419 million, equivalent to approximately US\$5.1 million⁸. Measured in dollars, the fund has decreased in the last two years, with US\$ 5.6 million in 2021 and US\$ 5.8 million in 2020. Five years ago, it was US\$6.2 million. Regardless of the size of this fund, two elements have hindered its stimulus role. On the one hand, CNTV has had delays in the actual delivery of the funds already allocated, thus creating financial difficulties for producers who have benefited from said resources. More fundamentally, and increasingly problematic given the relevance of *streaming* platforms in their role as co-producers, CNTV establishes as a rule that the works financed by the institution must be premiered on open television before other exhibition windows. This condition is conflicting with the expectations of partners who contribute more than CNTV. This is one of the reasons that has led Fábula, Chile's largest independent production company, to declare that it prefers not to apply for CNTV funds so as not to be subject to this condition.

Although the CNTV fund is truly relevant for the development of quality productions, it represents a minor proportion of the financing of free-to-air television. In 2022, advertising investment on open access television reached US\$285 million. This figure is lower than the US\$319 million of advertising investment in 2021 and only 56% of the US\$518 million that television collected from advertising a decade earlier⁹. What is unquestionable is that the resources with which Chilean television is made decreases every year due to the greater participation of digital advertising, which in 2022 reached 48% of the total. The advertising investment of pay-TV has not been included in these amounts since pay-TV in Chile does not produce fiction.

1.4 Communication policies

During the campaign that led Gabriel Boric to the presidency, concerns were raised about the functioning of the media system in Chile and the willingness to give more

⁸ Considering the average exchange rate during the year, according to the "observed dollar" value reported by the Central Bank.

⁹ The advertising investment for 2021 and 2022 comes from the Asociación de Agencias de Medios (AAM) and that for 2012 comes from the Asociación Chilena de Agencias de Publicidad (ACHAP). A 15% agency commission was deducted from the latter to make it comparable with the others. The ACHAP series goes up to 2018 and the AAM series starts in 2014.

space to the development of public media, both at a central and local level. Similar concerns were expressed in the proposal for a new constitution, developed by the Constitutional Convention that operated between July 4, 2021, and July 4, 2022, and which was rejected in a plebiscite by 62% of the voters. The communications content of the proposal was not central to the constitutional debate, so it is unlikely to have had a significant impact on the outcome.

A few days after the rejection of the constitutional proposal, the government resumed its campaign initiative, convening three state universities to lead a diagnosis and proposals aimed at strengthening the right to information and freedom of the press¹⁰. The final report highlighted the importance of guaranteeing an information ecosystem that respects human rights and the right to information, emphasizing the quality of information and journalistic rigor. It also stressed the importance of diversity in media ownership and control to ensure both pluralism and diversity of voices, in addition to advocating a greater role for the state and policies that promote interculturality (Pancani et al., 2023). However, the rejection of the constitutional proposal, the government's parliamentary minority and the little enthusiasm that the initiative generated in more liberal sectors, suggest that, if there are legal changes, they will not be significant.

1.5 Digital and mobile connectivity infrastructure

According to the Digital Quality of Life Index, developed to measure the digital well-being of countries, Chile ranks first in Latin America and 40th in the world, followed by Uruguay (41st) and Argentina (45th)¹¹. This puts the country in a good relative position for the use of digital technologies in the consumption of audiovisual content, particularly *streaming* services. This is expressed in a relevant way in the availability of Internet connections, both from mobile and fixed devices. In Chile, this information is reported monthly by the Undersecretary of Telecommunications (Subtel, 2023b).

The number of fixed Internet connections has grown at an average annual rate of 7.4% over the last 10 years. Year 2022 grew by 4% compared to 2021, a much lower rate than the previous two years (10.7% and 12.8%), but explainable in a country with a high penetration rate, close to 65% of households. Fixed connections are particularly significant, as they are where broadband use is concentrated, with no traffic limits that facilitate audiovisual content consumption.

¹⁰ Press release from the Ministry General Secretariat of Government. Available at <https://msgg.gob.cl/wp/2022/07/15/gobierno-firma-convenio-para-fortalecer-el-derecho-a-la-informacion-y-libertad-de-prensa/>

¹¹ The index is built on five pillars: cost, according to the purchasing power of the population; speed and stability of Internet connections; degree of development and inclusiveness of the infrastructure; e-security; and degree of digitalization of government services. The 2022 version can be reviewed at <https://surfshark.com/dql2022>.

Mobile connections are also relevant for the audiovisual industry, as they allow users to access content outside their homes. This ubiquity of content consumption is a relevant factor in the shift of advertising investment towards digital. Considering the last 10 years (only 3G, 4G and 5G connections), the average growth rate has been 13%. However, last year it was, for the first time, negative. Still, the number of mobile devices in operation exceeds the size of the population. After this slight decline of 0.8% in the number of connections compared to 2021, the number of connections is approximately 114 per 100 inhabitants.

2. Analysis of the Year: National and Ibero-American Premiere Fiction in 2022
TABLE 1. First-run fiction titles broadcasted in 2022

FIRST-RUN NATIONAL TITLES - 9	CHV
Canal 13	6. <i>El Primero de Nosotros</i> (telenovela-Argentina)
1. <i>Cromosoma 21</i> (series)	7. <i>Días Mejores</i> (series-Spain)
2. <i>La Torre de Mabel</i> (telenovela)	Mega
Mega	8. <i>Aguanta Corazón</i> (telenovela-Brazil)
3. <i>Amar Profundo</i> (telenovela)	9. <i>Dulce Ambición</i> (telenovela-Brazil)
4. <i>Hasta Encontrarte</i> (telenovela)	10. <i>Huérfanos de su Tierra</i> (telenovela-Brazil)
5. <i>Hijos del Desierto</i> (telenovela)	11. <i>Rock Story</i> (telenovela-Brazil)
6. <i>La Ley de Baltazar</i> (telenovela)	12. <i>Suerte de Vivir</i> (telenovela-Brazil)
7. <i>Pobre Novio</i> (telenovela)	TVN
8. <i>Verdades Ocultas</i> (telenovela)	13. <i>Sandro de América</i> (miniseries-Argentina)
TVN	14. <i>Genesis</i> (telenovela-Brazil)
9. <i>Celeste</i> (series)	15. <i>Raphael</i> (miniseries-Spain)
FIRST-RUN FOREIGN TITLES - 15	La Red
Canal 13	16. <i>La Rosa de Guadalupe</i> (unitary-Mexico)
1. <i>Santa Evita</i> (mini-series-Argentina)	FIRS-RUN OBITEL CO-PRODUCTIONS - 1
2. <i>Vidas Ajenas</i> (telenovela-Brazil)	CHV
3. <i>Cuna de Lobos</i> (telenovela-Mexico)	1. <i>Bosé Yo Seré</i> (series-Obitel coproduction)
4. <i>Los Ricos También Lloran</i> (telenovela-Mexico)	
5. <i>Si nos Dejan</i> (telenovela-Mexico)	TOTAL OF FIRST-RUN TITLES: 26

Source: Kantar IBOPE Media Chile - OBITEL Chile.

In 1981, with *La Madrastra*, Canal 13 began the permanent production of telenovelas, which, alongside TVN, transformed the television industry into a duopoly in which they disputed the leadership. There were no other actors, except for some anecdotal and unsuccessful attempts by other channels towards the end of the 1990s and the first decade of this century. The highest production volume, in terms of number of serialized fiction titles, was in 2014 with 17 different telenovelas, six series, in addition to other fiction formats in smaller volume. The dominant actors were the same as always, but not only them. That year the change began first with the inrush of Turkish telenovelas. Then TVN saw how its fiction production area was

hostilely captured by Mega, which hired its director and more than 50 employees, amongst them actors, technicians, and other roles. Towards the end of that year, Mega started its own production and Canal 13 also experienced its own internal crisis. Eight years later, there is an absolute dominator that is neither TVN nor Canal 13, but Mega.

It is expected that 2022 will be the last year with declining production and that, as of 2023, at least in terms of telenovelas, there will be an upturn since a new actor will be incorporated. After its purchase by Paramount Global, CHV is betting on becoming a relevant actor of fiction production in Chile.

On the other hand, although the number of new productions is low, Mega’s production is in good health: six telenovela titles premiered in 2022. Adding five from its agreement with Globo, which Canal 13 had years before, and six telenovelas of Turkish origin, it has a very robust fiction offer. In addition, Mega has expanded its market beyond the traditional one, reaching countries in Africa, Asia, and Europe with its production of telenovelas.

TABLE 1b. Rerun fiction titles broadcasted in 2022

NATIONAL RERUNS - 21	
Canal 13	
1. <i>Adrenalina</i> (telenovela)	
2. <i>Cerro Alegre</i> (telenovela)	
CHV	
3. <i>Gemelas</i> (telenovela)	
Mega	
4. <i>Casa de Muñecos</i> (telenovela)	
5. <i>Si Yo Fuera Rico</i> (telenovela)	
6. <i>Tranquilo Papá</i> (telenovela)	
TVN	
7. <i>Amores de Mercado</i> (telenovela)	
8. <i>Cuentos Chilenos</i> (telefilm)	
9. <i>El Cuento del Tío</i> (unitary)	
10. <i>El Día Menos Pensado</i> (docudrama)	
11. <i>En Terapia</i> (series)	
12. <i>La Canción de tu Vida</i> (series)	
13. <i>La Fiera</i> (telenovela)	
14. <i>La Vida es una Lotería</i> (unitary)	
15. <i>Mea Culpa Clásicos</i> (docudrama)	
16. <i>Pampa Ilusión</i> (telenovela)	
17. <i>Rojo y Miel</i> (telenovela)	
18. <i>Sucupira</i> (telenovela)	
19. <i>Sucupira, La Comedia</i> (series)	
TV+	
20. <i>Los Años Dorados</i> (sitcom)	
La Red	
21. <i>Una Historia Necesaria</i> (other fiction tv)	
FOREIGN RERUNS - 11	
Canal 13	
1. <i>Pasión de Gavilanes</i> (telenovela-Obitel coproduction)	
2. <i>Yo Soy Betty, la Fea</i> (telenovela-Colombia)	
Mega	
3. <i>El Tiempo no Para</i> (telenovela-Brazil)	
TVN	
4. <i>Moisés los 10 Mandamientos</i> (telenovela-Brazil)	
5. <i>Terra Nostra</i> (telenovela-Brazil)	
6. <i>Celia, la Serie</i> (telenovela-Colombia)	
TV+	
7. <i>Hernán</i> (series-Mexico)	
La Red	
8. <i>Águila Roja</i> (series-Spain)	
9. <i>Hay Alguien Ahí</i> (series-Spain)	
10. <i>Hispania, la Legenda</i> (series-Spain)	
11. <i>Como Dice el Dicho</i> (series-Mexico)	

Source: Kantar IBOPE Media Chile - OBITEL Chile

The advantage of decades of production is evident when reruns are included in the analysis. Archived material not only offers the possibility of an almost royalty-free

exhibition, except for payments to actors for image rights, but also, even if they are reruns, for a significant part of the population they are titles that have not been seen or, at least, are not fresh in the memory. Almost all the national titles rerun by Canal 13 and TVN were released more than 15 years ago and even one (*Rojo y Miel*) is from 1994. The amount of pseudo premiere hours of TVN and Canal 13, discounting summaries to make them comparable numbers, is 60% more than the national premiere hours shown in table 3. That is, national fiction was very present on TVN and Canal 13 screens, but mostly fiction already shown years ago, produced with larger production budgets than the current ones.

TABLE 2. Formats of national premiere fiction and their evolution during the five-year period.

Format	Titles						Hours					
	2018	2019	2020	2021	2022	Total	2018	2019	2020	2021	2022	Total
Telenovela	11	11	5	7	7	41	615:10	682:30	224:55	545:00	457:00	2524:35
Series	3	4	6	2	2	17	13:55	61:00	44:35	20:50	19:55	160:15
Miniseries	2	1	1	3	0	7	8:15	3:00	4:30	10:45	0:00	26:30
TV Movie	0	1	0	0	0	1	0:00	0:55	0:00	0:00	0:00	0:55
Unitary	1	0	0	0	0	1	84:40	0:00	0:00	0:00	0:00	84:40
Docudrama	0	0	0	1	0	1	0:00	0:00	0:00	10:05	0:00	10:05
Others	0	0	0	0	0	0	0:00	0:00	0:00	0:00	0:00	0:00
Total	17	17	12	13	9	68	722:00	747:25	274:00	586:40	476:55	2807:00

Source: Kantar IBOPE Media Chile - OBITEL Chile

In 2022, the trend of reducing the diversity of formats was accentuated. A decade ago, the volume of production was also in telenovelas, but the presence of docudramas, telefilms, unitarios and sitcoms was common. This year, broadcast television’s offer was limited only to telenovelas and series.

TABLE 3. First-run fiction exhibited in 2022: countries of origin

Format	Titles				Hours			
	National	%	Rest Obitel	%	National	%	Rest Obitel	%
Telenovela	7	77.8	11	64.7	457:00	95.8	662:45	79.6
Series	2	22.2	2	11.8	19:55	4.2	1:40	0.2
Miniseries	0	0.0	3	17.6	0:00	0.0	15:15	1.8
Telefilm	0	0.0	0	0.0	0:00	0.0	0:00	0.0
Unitary	0	0.0	1	5.9	0:00	0.0	153:00	18.4
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	9	100	17	100	476:55	100	832:40	100

Source: Kantar IBOPE Media Chile - OBITEL Chile

Table 3 shows the origin of the Ibero-American premiere productions exhibited during 2022. During the last decade, the countries from which Chile has imported productions have been mainly Mexico and Brazil. In both cases, a decrease in the number of titles has been observed as of 2015. The Mexican case has coincided with its substitution of products of Turkish origin. Meanwhile, in the Brazilian case, the change of Globo’s partner in Chile has also had an influence. For more than 20 years, Canal 13 had a privileged relationship with Globo, whose telenovelas were shown after lunchtime. The irruption of Mega not only meant undermining TVN’s production capacity, but also taking away Canal 13’s contract with Globo. For a while, Globo’s exit from Canal 13 was not reflected in a large presence of Brazilian titles on Mega, where two or three telenovelas were shown per year, but as of 2022 there seems to have changed, as Mega exhibited a record of seven Brazilian telenovelas. To weigh the influence of fiction from the different Obitel countries, it is necessary to consider that telenovelas of Turkish origin follow similar exhibition and consumption logics to those of Ibero-American origin and occupy an extremely high space within Chilean screens. During 2022, 13 Turkish telenovelas were shown. In volume of exhibition hours, this more than doubled those of national premiere fiction and is 9% more than the sum of fiction imported from all Obitel countries, in addition to being programmed at times of higher audience than the latter. Some 50% of Turkish fiction is in *prime* time, while only 20% of Ibero-American fiction (not Chilean) occupies that programming space.

TABLE 4. Formats of national and Ibero-American fiction exhibited in 2022

Format	Titles				Hours			
	National	%	Rest Obitel	%	National	%	Rest Obitel	%
Telenovela	7	77.8	11	64.7	457:00	95.8	662:45	79.6
Series	2	22.2	2	11.8	19:55	4.2	1:40	0.2
Miniseries	0	0.0	3	17.6	0:00	0.0	15:15	1.8
Telefilm	0	0.0	0	0.0	0:00	0.0	0:00	0.0
Unitary	0	0.0	1	5.9	0:00	0.0	153:00	18.4
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	9	100	17	100	476:55	100	832:40	100

Source: Kantar IBOPE Media Chile - OBITEL Chile

What in 2021 seemed to be a turnaround in the trend - imported hours of series surpassed those of telenovelas - in 2022 proved to be an anecdotal fact: telenovelas returned to their usual predominance among television fiction formats, widely surpassing hours of series and miniseries.

The only format with relevant screen time when compared to telenovela is that of unitarios, with almost 17% among the hours of imported fiction. However, this is a unique and exceptional case that is repeated year after year, *La Rosa de Guadalupe*, which accumulates hours of screen time on La Red, but which in Chile, unlike Mexico, has an audience that in 66% of the broadcasts did not reach one *rating point*.

TABLE 5: 10 Most watched titles in 2022

Title		Channel	Production Company (Country)	Format/genre	No. of cap/ep in 2022	Time zone	Rating	Share
1	<i>La Ley de Baltazar</i>	Mega	Chilefilms (CL)	Telenovela/ Romantic Comedy	147	Prime time	17.0	26.4
2	<i>Pobre Novio</i>	Mega	Mega+Chilefilms (CL)	Telenovela/Comedy	90	Prime time	15.3	24.6
3	<i>Hijos del Desierto</i>	Mega	Mazal (CL)	Telenovela/ Period police drama	75	Prime time	14.0	22.0
4	<i>Amar Profundo</i>	Mega	Mega + DDRio (CL)	Telenovela/Dramatic comedy	157	Prime time	12.6	20.8
5	<i>Verdades Ocultas</i>	Mega	Chilefilms (CL)	Telenovela/Drama	110	Afternoon	12.4	25.1
6	<i>Hasta Encontrarte</i>	Mega	Mega+Chilefilms (CL)	Telenovela/ Romantic Drama	115	Afternoon	12.2	24.8
7	<i>Suerte de Vivir</i>	Mega	Estúdios Globo (BR)	Telenovela/ Romantic Drama	132	Afternoon	10.5	21.4
8	<i>Dulce Ambición</i>	Mega	Estúdios Globo (BR)	Telenovela/ Melodrama	77	Afternoon	8.9	18.6
9	<i>Días Mejores</i>	CHV	Viacom+Zeta (ES)	Series/Comedy drama	1	Night	7.6	16.6
10	<i>Huérfanos de su Tierra</i>	Mega	Estúdios Globo (BR)	Telenovela/ Romantic Drama	14	Afternoon	7.0	15.0
Total of national productions: 6				Original foreign scripts: 4				
60%				4%				

Source: Kantar IBOPE Media Chile - OBITEL Chile

Only an anomalous fact, which is more a promotional fact than a real programming offer, prevents the *Top 10* from being completely dominated by Mega in 2022. In ninth place appears a single broadcast (May 6) of the successful Spanish series *Días Mejores*. The rest of the first season could not be seen on Chilevisión, but could be seen on Paramount+, both subsidiaries of Paramount Global. The purpose of this broadcast was only to promote the *streaming* signal. Although this is an anecdotal fact, it speaks of the communicating vessels between the different screens that are becoming increasingly interdependent.

If Turkish fiction were to join Table 5, it would occupy three places, with *Traicionada* (Mega) occupying position six, *Doctor Milagro* (CHV) in position eight and *El Escape de Cemre* (Mega) in position 10.

The six national productions in this list correspond to Mega. With minor exceptions, when this space was dominated by Canal 13 and TVN, productions were made by the channels’ in-house teams. Mega’s approach is different. In all the cases of the *Top 10*, the productions are developed together with external production companies, with different degrees of involvement of Mega’s teams in the production.

TABLE 5b: 10 Most watched national titles in 2022

Title		Channel	Production Company (Country)	Format/genre	No. of cap/ep in 2022	Time zone	Rating	Share
1	<i>La Ley de Baltazar</i>	Mega	Chilefilms (CL)	Telenovela/ Romantic Comedy	147	Prime time	17.0	26.4
2	<i>Pobre Novio</i>	Mega	Mega+Chilefilms (CL)	Telenovela/Comedy	90	Prime time	15.3	24.6
3	<i>Hijos del Desierto</i>	Mega	Mazal	Telenovela/ Period police drama	75	Prime time	14.0	22.0
4	<i>Amar Profundo</i>	Mega	Mega + DDRio (CL)	Telenovela/Dramatic comedy	157	Prime time	12.6	20.8
5	<i>Verdades Ocultas</i>	Mega	Chilefilms (CL)	Telenovela/Drama	110	Afternoon	12.4	25.1
6	<i>Hasta Encontrarte</i>	Mega	Mega+Chilefilms (CL)	Telenovela/ Romantic Drama	115	Afternoon	12.2	24.8
11	<i>Cromosoma 21</i>	Channel 13	Canal 13 + Film & + Maker Wild Sheep Content (CL)	Series / Police drama	8	Prime time	5.6	9.3
18	<i>La Torre de Mabel</i>	Channel 13	Mazal (CL)	Telenovela / Romantic comedy	31	Nocturno	3.3	7.8
26	<i>Celeste</i>	TVN	Jaime Morales Productions (CL)	Series / Juvenile	8	Tomorrow	1.1	5.0
-	-	-	-	-	-	-	-	-
					Original foreign scripts: 0			
					0%			

Source: Kantar IBOPE Media Chile - OBITEL Chile

Table 5b, destined to the ten national titles with the highest audience, only includes nine. The reason is that, in 2022, for the first time in the 16 years this report has been elaborated, less than 10 national television fiction titles were produced.

The first column of the table shows the position reached by each title in the complete *ranking*, including all Ibero-American fiction. In 11th place appears *Cromosoma 21*, which was financed by the National Television Council fund and was released on Netflix in 2023. *La Torre de Mabel*, in 18th place, had begun broadcasting in mid-2021. Finally, the case of *Celeste* is unique. It was created for NTV, the cultural children’s signal of TVN, but once on the air, it was decided to move it to the main channel.

TABLE 6: 10 Most watched titles in 2022

Title		Chann el	Gender %		GSE%			
			Women	Men	ABC1	C2	C3	D
1	<i>La Ley de Baltazar</i>	Mega	64%	36%	8%	18%	32%	43%
2	<i>Pobre Novio</i>	Mega	62%	38%	8%	20%	30%	42%
3	<i>Hijos del Desierto</i>	Mega	61%	39%	8%	20%	33%	39%
4	<i>Amar Profundo</i>	Mega	60%	40%	9%	17%	32%	42%
5	<i>Verdades Ocultas</i>	Mega	67%	33%	9%	18%	25%	48%
6	<i>Hasta Encontrarte</i>	Mega	66%	34%	6%	16%	27%	51%
7	<i>Suerte de Vivir</i>	Mega	65%	35%	6%	15%	26%	54%
8	<i>Dulce Ambición</i>	Mega	66%	34%	8%	15%	27%	49%
9	<i>Días Mejores</i>	CHV	52%	48%	4%	12%	39%	45%
10	<i>Huérfanos de su Tierra</i>	Mega	63%	37%	5%	16%	26%	53%

Title		Age % Age						
		04 - 12	13-17	18-24	25-34	35-49	50-64	65-+
1	<i>La Ley de Baltazar</i>	4%	4%	5%	13%	26%	25%	22%
2	<i>Pobre Novio</i>	5%	4%	4%	16%	25%	25%	20%
3	<i>Hijos del Desierto</i>	3%	2%	6%	14%	26%	27%	21%
4	<i>Amar Profundo</i>	4%	4%	5%	17%	26%	25%	19%
5	<i>Verdades Ocultas</i>	5%	3%	4%	12%	22%	24%	29%
6	<i>Hasta Encontrarte</i>	4%	3%	5%	9%	21%	23%	36%
7	<i>Suerte de Vivir</i>	5%	3%	5%	9%	20%	22%	35%
8	<i>Dulce Ambición</i>	4%	3%	4%	12%	20%	27%	30%
9	<i>Días Mejores</i>	3%	0%	5%	6%	14%	45%	27%
10	<i>Huérfanos de su Tierra</i>	4%	2%	6%	8%	19%	25%	35%

Source: Kantar IBOPE Media Chile - OBITEL Chile

The audience profiles shown in Table 6 are quite homogeneous, but their intertemporal comparison is informative about the phenomenon of change in television fiction audiences. Compared to the profiles with those obtained a decade ago, the aging of the audiences is notorious. In 2012, those under 25 years of age represented 25% of the audience. In 2022, only 12%, i.e., this audience segment dropped by almost half. The opposite is true for older viewers. While in 2012 people aged 50 and over constituted 36% of the audience, in 2022 that number rose to 54%.

3. VoD 2022 Monitoring

3.1. VoD Platforms Market

The large *streaming companies* do not report their subscriber figures in Chile, although there are estimates, such as those from Statista or FlixPatrol, which for Netflix alone place them at between one million and one and a half million¹². Some indirect measures suggest sustained growth since the pandemic.

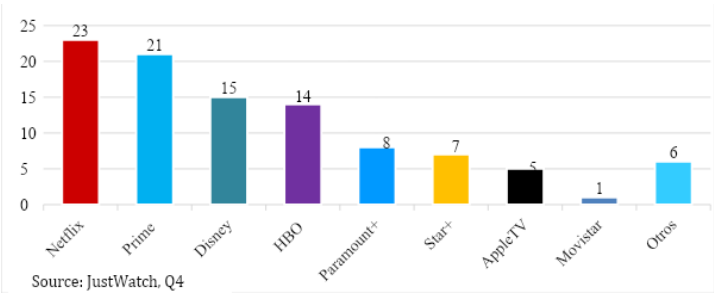
A sign of the growth of *streaming* is provided by the telecommunications company Entel, which holds a 35% of mobile data traffic (Subtel, 2023a). It reports that mobile data usage grew by 33% nationally in 2022 compared to 2021. Of this total, *streaming* accounts for 22%¹³.

The Undersecretary of Telecommunications (Subtel) records data traffic in Chile through fixed and mobile networks. The Subtel series shows that, although it has been slowing down, traffic is growing at very high rates: 60% between 2020 and 2019, triggered by the quarantine, but still growing at 25% in 2021 and then 16% in 2022 (Subtel, 2023a).

With numbers that are not comparable to those of Statista or FlixPatrol, the National Television Council published a study in which it estimated that 42% of Chilean households have access to some *streaming* platform, being 2.02 the average number of platforms that these households have, reaching 5 or more in 3% of households (CNTV, 2022).

In the absence of administrative information on the number of subscribers, the alternative available to compare their relative shares is the estimate made quarterly by JustWatch, the German *streaming* search and audience information services company present in 120 countries¹⁴.

Figure 3. Participation of the main international platforms



¹² For Statista projections see <https://www.statista.com/statistics/324077/chile-netflix-subscribers/> and for FlixPatrol projections see <https://flixpatrol.com/streaming-service/netflix/subscribers/#list> (accessed 5/27/2023).

¹³ Company press release of 01/31/2023. <https://informacioncorporativa.entel.cl/comunicados-de-prensa/posts/uso-de-datos-moviles-crecio-un-33-a-nivel-nacional-durante-2022> (accessed 05/27/2023).

¹⁴ See <https://www.pauta.cl/ocio/netflix-alcanza-solo-el-23-de-las-preferencias-de-lo-usuarios> (accessed on 05/27/2023)

Unlike 2021, in which the irruption of HBO Max and Star+ towards the middle of the year did not particularly affect Netflix and the rest of the platforms, in 2022 what is noticeable is a stable decline of Netflix together with a strong growth of HBO Max and Star+. All in all, JustWatch reports that Netflix remains the *streaming* platform with the highest penetration in Chile, but with Prime Video just two points behind. Although for Netflix this is a drop of only one point from the same period last year, at the end of the first quarter, according to the same source, its share was 25%. This trend seems to be close to the situation in the North American market, where the two main players are practically tied.

3.2. Supply of local VoD platforms by 2022

Figure 3 shows the market shares of eight VoD *streaming* platforms. In addition to being the most popular, they are all from North American origin, but the offer of VoD services, paid or free, is not limited to them and it is possible to recognize other platforms of a different nature.

On the one hand, there are the platforms of heritage nature, whose mission is to preserve and disseminate the Chilean audiovisual heritage. Here, the Cineteca Nacional stands out, which, in addition to its work of physical preservation of audiovisual titles and dissemination through its own room, offers a VoD access service to some of the materials it preserves¹⁵. Along the same lines are the Cineteca de la Universidad de Chile and the Archivo Fílmico UC of the Pontificia Universidad Católica de Chile.

The National Television Council (CNTV), in addition to its regulatory and promotional role, makes available to the public the audiovisual works it has helped finance through two different VoD services. On the one hand, CNTV Play hosts more than 150 titles of different genres and formats, mostly serialized. As of July 2022, it had more than 300,000 registered users. At the same time, content specifically for children is offered through CNTV Niños, which has around 2,600 children's videos of different types.

Just as the CNTV plays a role in promoting television, the Ministry of Culture, Arts and Heritage does the same for cinema. This ministry makes available to the public some of the titles it has supported through the VoD platform OndaMedia. This service has the particularity that, although it is free for the public, it pays the filmmakers for the viewing of their works.

In addition to the VoD services mentioned above, all of which are of a public service nature, there are also services offered by some of the television channels. Canal 13 with 13Now (free), Mega with Mega Go (paid) and TVN with TVN Play (free),

¹⁵ The Cineteca is not formally offered as a VoD service, but provides access to its online catalog, through which it is possible to access those materials available for *online* viewing. Ver <https://cinetecanacional-bd.cl/acervo/8320ba399a46a571140bea0780b119917d74a0fc/ffb3a13e1b09dcd-4663930b3b118ae5f992221b5/index.php?mp=hom&mh=>

which has more than 5,000 hours of content available. In the case of CHV, whose owner is Paramount Global, some of its content is available through the Pluto TV platform (free).

In a similar way to broadcast television channels, the main pay-TV operators offer their own *streaming* services, either to access their content live, via VoD or rental and purchase of other material. The main ones are Movistar Play, Entel Go, DirecTV Go, VTR+, Claro Video. The latter two are in the process of merging.

In terms of thematically segmented services, it is worth mentioning TNT Sport's Chilean subsidiary, Estadio TNT Sports Chile, which offers its subscribers access to the local soccer tournament and other related content.

Finally, it is worth mentioning the Chilean platform Riivi, launched in 2020 with a focus on Latin American films, series, and documentaries. Access is free of charge and is financed through advertising. It has more than 300,000 users and plans to expand to Argentina and Mexico.

3.3 VoD analysis in 2022: national premiere fiction and co-productions.

The presence of Chilean serialized fiction made for platforms is limited and with little prospect of increasing. This does not mean that Chileans are producing little, but that they are not producing in Chile. Fábula, Chile's largest production company, which produced three of the four titles in Table 8, opened offices in Los Angeles and Mexico City. The reason is simple: 70% of Netflix's production budget for Latin America is spent in Mexico. It is more profitable to produce there than in Chile, where Netflix has told industry executives that its production would not go beyond one film a year. For its part, Amazon closed its office and has also let it be known that it would not continue producing in Chile. The reason for producing locally is to attract local audiences and besides being a small market, its penetration is already high.

Another factor that limits the development of series for platforms is self-induced. The CNTV established as a rule that any work financed by it must be shown on an open television channel before being shown in other exhibition windows. However, CNTV funds are a minority contribution to the production costs of a high standard series, thus reducing the attractiveness for a platform. As mentioned, Fábula has stated that it prefers not to apply for CNTV funds, but for other production companies, with less capacity to raise financing, this policy is a serious limitation.

Table 8 shows the premiere titles of Chilean serialized fiction on platforms. Of these, the seventh season of *Verdades Ocultas* - the only title not produced by Fábula - qualifies at the edges of the definition adopted for this table. It is a telenovela made and exhibited on open television, but its seventh and last season premiered during the same year on Mega and on Netflix.

42 Días en la Oscuridad is the first original series for Netflix and the first major success of a Chilean series produced for platforms. At its peak, on Netflix it became

the seventh most watched series among non-English speaking series¹⁶. It is based on a real case of a woman who disappears without a trace in southern Chile. Her husband claims to have received a ransom call, which triggers a suspenseful plot in which the sister of the missing woman leads her search, facing the indifference of institutions, social prejudice, and media harassment.

The case of the second season of *El Presidente* is illustrative of the complexities of applying the traditional categories of territoriality to a series. Its production was led from Chile by Fábula, but it was co-produced by Gaumont (France) and Kapow (Argentina) and the execution in Uruguay, where it was shot, oversaw the Uruguayan production company Salado.

**TABLE 7. National titles and premiere co-productions
exhibited in 2022 on VoD systems**

NATIONAL PREMIERE TITLES	PREMIERE CO-PRODUCTIONS
Prime Video (1) 01. <i>La Jauría, S2</i> (series)	Prime Video (2) 01. <i>El Presidente, S2</i> (series - Chile, France, Argentina)
Netflix (2) 02. <i>42 Días en la Oscuridad</i> (series) 03. <i>Verdades Ocultas, T7</i> (Telenovela)	02. <i>Noticias de un Secuestro</i> (miniseries - Chile, Colombia)

Source: Obitel Chile

4. Interactivity and audience participation

After five years of broadcasting, *Verdades Ocultas* came to an end. With a presence in several social networks, Mega uploaded daily updates, and comments about the telenovela. On Instagram (IG) it found a good channel of interaction, both on the “Teleseries Mega” site and on that of the telenovela itself, with more than 21 thousand followers. There, every day, shocking scenes were commented, or viewers were asked their opinion about the twists and turns of this telenovela that spanned over years, where the entrance and exit of many actors were justified with deaths and plastic surgeries, amongst others. In the Teleseries Mega account, the previews and comments about this telenovela alternated with posts about others, such as *Amar Profundo*, or *La Ley de Baltazar*.

Regarding the latter, three months before its premiere, Mega used the different platforms to involve viewers, sharing photos of the crew meetings and locations, set in a town in southern Chile - Cochamó -, which over the months became a tourist attraction. Likewise, videos were uploaded with *backstage* images and interviews

¹⁶ This data was published on Instagram from the Netflix Chile account.

with the actors. In this way, IG became a channel to interact with the audience, taking advantage of the success of this telenovela. Its 80 thousand followers on IG illustrate the high rating that this telenovela had. Its beautiful landscapes, intimate story and attractive characters helped to achieve this.

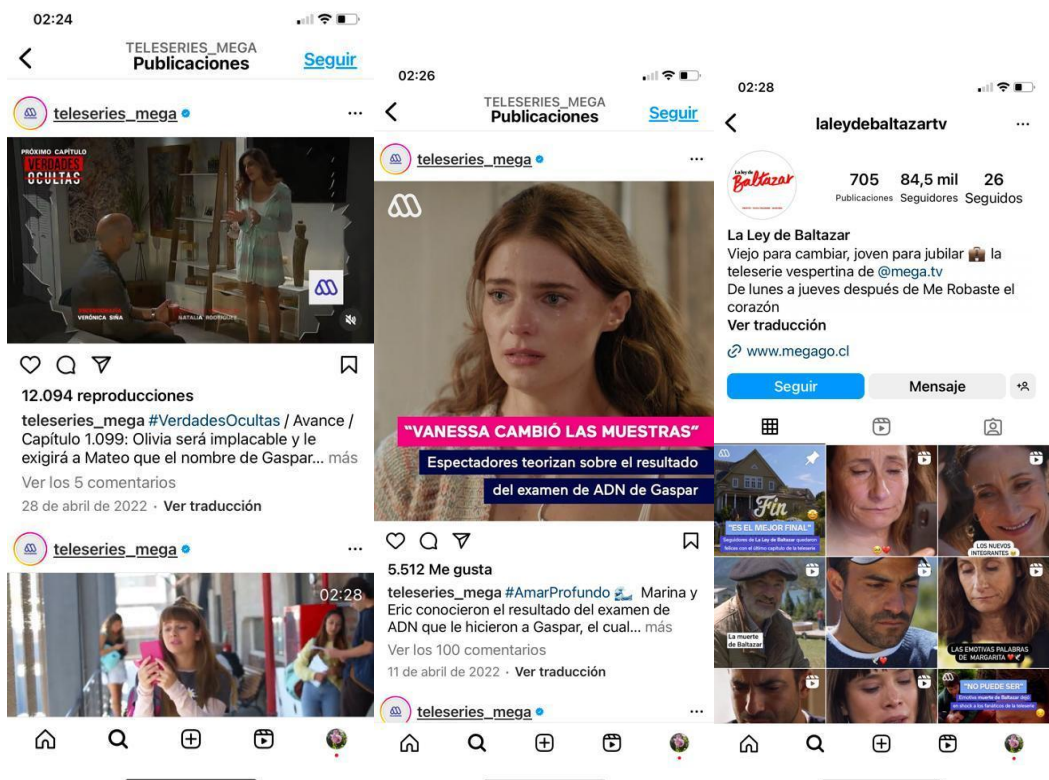
Meanwhile, on Twitter, viewers also commented on the attitudes of the protagonists, although no differences were observed this year in the strategies of the channels regarding their actions in social networks. The use of the *hashtag* presents two functionalities: the first one, to indicate which production is being broadcasted (following the pattern #”telenovela name”_at_”channel name”); while the second one aims at a call to action of the viewer (for example, #MarianoSeReconcilia), so that the contributions in social networks use that hashtag.

Much like what happened with *La Ley de Baltazar*, but with less advance notice, the IG of *Hijos del Desierto*, Mega’s nighttime telenovelas, began to upload previews of the telenovela and information about the actors and characters. Set in the port of Valparaíso in the 1930s, this telenovela boosted intrigue, suspense, love, and violence. With close to 80 thousand followers on IG, it managed to keep the attention of viewers thanks to the use of social media.

YouTube, meanwhile, was used to promote the productions through special audiovisual pieces, as was the case with *42 Días en la Oscuridad*, aired on Netflix.



Source: <https://youtu.be/u52xWzHdN4o>, revised 08/06/2023



Source: Instagram teleseries_mega, and La ley de Baltazar (revised 05/06/2023).

5. Highlights of the year

The presence of Asian fiction, particularly from South Korea, has reappeared strongly in Chilean open-access television. Although it is an emerging phenomenon that has not yet challenged the predominance of Turkish melodramas on the screen, two situations have shown that doramas, or more specifically, K-Dramas, have emerged from their niche spaces in *streaming* platforms and websites to become part of the outstanding offer of the private channel Canal 13 and the state channel, Televisión Nacional de Chile (TVN).

In the first case, there are already four Korean fictions aired consecutively. Canal 13 began this offer with a safe bet by programming *Escalera al Cielo*, a successful Korean drama available on various *streaming* platforms, which has triumphed in more than 15 Latin American countries and which in Chile had already been broadcast by TVN in 2006. This production, already in 2023, was followed by the successful series *Sorpresas del Destino*, *Mirada de Ángel* and *Pacto de Amor*, all with dramatic overtones and plot arcs recognizable by the consumer audience of classic Latin American melodrama that include heroines in disgrace, memory loss, incurable diseases and unscrupulous villains that truncate the romantic destiny of the protagonists. This offer has been announced by the media as “Korean telenovelas” that “take over Canal 13’s afternoon”, since they are broadcasted in the after-lunch time slot. In this

slot, they have been programmed together with reruns of proven Latin American hits such as *Yo soy Betty, la Fea*, and *Pasión de Gavilanes*.

In the case of TVN, during the second half of 2022, an alliance was announced between the channel and the Korean Broadcasting System (KBS) of South Korea. This agreement shows a concrete and planned interest on the part of the Chilean channel to incorporate in its 2023 programming schedule contents from that country and, thus, attract new, younger audiences that have moved away from the small screen. According to the information released, both media aim, on the one hand, to exchange content, including the export to Korea of part of the catalogue of TVN's Drama Area, and, on the other hand, the generation of content for digital platforms (especially TVN Play) and for different programs of the national channel.

As an inaugural milestone of this alliance, TVN supported the broadcasting of the Music Bank 2022 Festival held in November at the Monumental Stadium in Santiago, which was broadcasted for the first time by an open signal in Chile. Although this K-Pop festival was considered by some media as “chaotic” due to production problems and only three of the six scheduled groups could perform due to weather conditions, the thousands of people who filled the stadium showcased the growing success of Korean pop culture amongst Chileans. In fact, on December 9, the festival was broadcasted on its entirety through TVN, including the fall of one of the singers and the moment when the show was suspended. On that occasion, the award-winning Korean film *Parasite*, also a reference of the so-called “Korean wave” or “hallyu” (Dettleff, 2018; Carballo, 2018), was also programmed at a *prime time* slot.

6. Theme of the year: Independent production companies and the internationalization of television fiction production in Ibero-America.

Since 1967, the Chilean television fiction industry has had audience successes with series and telenovelas such as *Los días jóvenes*, *Padre Gallo* and *La colorina*. However, production was intermittent, and the production systems were not very schematic. It was with the premiere of *La Madrastra* (1981) that Chile started a continuous production, with “millionaire budgets, competition amongst channels, emergence of stars and planning of several productions at the same time” (Rodríguez Frías & Gutiérrez López, 2021, p.15).

This fact, together with the arrival of Herval Rossano in 1982 from Brazil after directing *La esclava Isaura* (Red Globo), changed and structured the production of an industry that lacked systematization. Ricardo Vicuña, one of the first telenovela directors at TVN, recalls that it was Rossano who imposed the way of organizing recordings with the “roteros” model: “it comes from *roteiro*, which in Brazil means shooting plan. It is the planning of what is going to be recorded during a week” (Rodríguez Frías & Gutiérrez López, 2021, p.16).

In the past, the channels were responsible for the entire production process, from the conception of the idea to the hiring of actors, scriptwriters, and technical crew, as well as the construction of sets, costumes, and the execution of shooting. The budget depended on the channel's board of directors and *ratings* became a crucial factor in attracting advertisers.

Today, the television fiction industry in Chile has undergone significant changes in its production form, where three factors were a turning point in the system: the inclusion of new schedules for national fiction, the creation of new drama areas in channels that until then had produced fiction intermittently, and the strengthening and growth of external production companies.

6.1 The great leap of production companies to TV

Previously, production companies in Chile focused on producing advertising and film, with concrete series or program projects for specific channels on a secondary basis. The funds from the National Television Council (CNTV) were conditioned to the alliance between the production company and the channel that committed to the broadcast.

However, in the early 2000s, the panorama changed drastically. The entry on the scene of the production company Roos Films, with sitcoms, telefilms, and telenovelas for several channels, introduced a new form of television fiction development. To this was added the opening of new schedules in the programming grid: in 2005, TVN premiered *Ídolos*, the first night telenovela in Chile at 10:00 pm, which inaugurated a new time slot for this type of fiction. Additionally, the end of the series *Los Venegas* in 2010 left TVN without content in the 15:00 slot for the first time in more than two decades. Other channels, in that time slot, broadcast foreign telenovelas or repeats of national productions, but TVN bet on generating its own telenovela, *Esperanza* (2011), reinstituting the Chilean daytime telenovela, something not seen since 1982 when Canal 13 broadcasted *Bienvenido Hermano Andes*.

Additionally, TVN and Canal 13, actors of a practically uninterrupted fiction production duopoly, were confronted by Mega and CHV with their new Drama Areas that began to grow with new fiction proposals.

This context, together with the lack of space in studios, the need to comply with shooting schedules and the growing pressure to generate more fictional content for the small screen implied outsourcing the creation of new audiovisual fiction. In addition, it was necessary to refresh the financing logic. Pablo Ávila, television producer and current president and CEO of AGTV and Mazal Producciones, began to rethink the business model when he was Production Manager of TVN and then as Programming Manager of Canal 13, because he began to know the macro numbers of the industry. For him, television was facing an economic crisis, with advertising unable to maintain the high sales standards of the past. Channels

could not maintain large teams of staff as they had in the “Golden Age” of the industry. Avila (2023) saw “a business opportunity to become independent and take that operational cost out of the channels”.

The production company Myfriend, which had been a pioneer in producing *Esperanza* with TVN, changed channels to produce *Buscando a María* (2015) for CHV. Bowen Producciones, which had produced for Canal 13 the adaptation of the Argentine telenovela *Rebelde Way* under the name *Corazón Rebelde* (2009), won TVN’s bid to produce *Dama y Obrero* (2012), making way for TVN to become its first and only supplier. Chilefilms, known for producing films, anthology series and series, in addition to leasing its studios and facilities to various channels, began producing *Verdades Ocultas* for Mega in 2019, generating an alliance that continues to this day. For its part, AGTV signed in 2015 with Mega’s new Drama Area an agreement to produce four telenovelas; after that it did something similar with Canal 13 for five years, to then return to Mega to produce *Hijos del Desierto* (2023), taking full charge of billing and technical equipment, even switching to cameras with cinema optics, Blackmagic 12K.

In his more than two decades of experience, Jaime Morales, scriptwriter of telenovelas such as *Los Carmona*, *La Chúcará* and the Chilean adaptation of the series *Ana y los siete*, has witnessed this consolidation between external production companies and channels, which has led to different production models: there are channels that act as production companies without external support, independent production companies in charge of the content of a channel following its guidelines, and, finally, a “hybrid” model where, in the words of Morales (2023) “the production company enters to set guidelines within the content to the narrative or form”.

This change of models allowed consolidating the use of independent production companies for the creation of television audiovisual fiction. Thus, Morales, after realizing that due to the content crisis it was important to become the manager of his own projects, created his own production company, Jaime Morales Producciones, presenting a very small series proposal to TVN. “As we progressed in conversations, the project grew and we finally had a first season on NTV, TVN’s cultural channel,” he explains.

Thus, *Celeste* (2022), a youth series that had three seasons and fluctuated between TVN’s cultural signal, NTV, and that of the channel itself, was born. Morales experienced what it meant to be an independent producer and to deal with a channel in a concrete way, because he knew the limits and editorial line of NTV, which “had a very clear spirit of a family cultural channel [...]. They watched over the content”.

Currently, the relationship between external production companies and television channels varies according to the economic model, format, and genre they produce. Telenovela production companies, such as DDRio, Mazal and AGTV, are highly dependent on the channels, although they have a stable production structure.

On the other hand, series production companies, such as Parox or Fábula, tend to have a more solid structure, as they distribute for platforms such as Amazon and Netflix. These production companies have greater financial security and operational efficiency. As for cinema, there are well-known production companies associated with directors, such as Andrés Wood or Silvio Caiozzi, while independent films depend more on state funds and are usually linked to smaller and more unstable production companies.

6.2 Production Company Models in the Audiovisual Industry

In Chile, the Association of Independent Producers (API) groups smaller production companies, while the Association of Television Producers (APCT) brings together production companies that have been around longer and are more established. However, for Marcela Santibáñez, Oscar-nominated producer for her work on the documentary *El Agente Topo* (2021), “in Chile all production companies are independent”.

According to Santibáñez, what makes it possible to speak of different scales and financing logics, differentiating between independent and dependent production companies, does not lie in whether they produce for foreign platforms or for a channel, but in their size and financial capacity. Smaller production companies tend to have difficulties due to the lack of cash flow to finance projects. In contrast, larger production companies have already established a steady flow of revenue and work. In addition, there is a disparity in the number of employees and labor stability, where the system for smaller production companies is considered more precarious (Santibáñez, 2023).

Santibáñez notes that in Chile the audiovisual industry has numerous small independent production companies, which arise due to the lack of comprehensive regulations governing their activity. In her words, these production companies are easy to create, because “although it is necessary to meet certain requirements, such as being a legal entity, beyond that, there are not many regulations”. Many of these production companies do not last in the long term, as they are created to apply for financing funds and disappear after one or two years, since they lack projects or economic solvency, unlike larger production companies with permanent flows, such as Fábula, which have advertising contracts and international financing. In addition, they have access to additional platforms for the distribution of their content beyond broadcast TV.

Daniel Castell, creative director in charge of Fábula’s platform content development (in the series area), differs with Santibáñez, and identifies three types of television fiction production companies in Chile: independent, dependent and co-producers. Independent production companies, which for Castell are like Fábula, have a solid and consolidated business model. Fábula, founded by Pablo and Juan de Dios

Larraín almost twenty years ago, initially stood out in advertising and film production. Its international recognition came with the Oscar-nominated film *No* (2012). Subsequently, in 2014, Fábula ventured into television with *No, la serie*, broadcasted by TVN, and in 2015 created its television department. However, while Fábula produced programs for TVN, CHV and Canal 13, it soon left the Chilean channels behind and went on to produce content for OTT platforms.

Secondly, Castell specifies that there are dependent production companies, which are in an initial phase and depend on state funds due to their lack of seniority and trajectory to participate in international co-productions. Finally, there are the dependent production companies with a more established name, whose main strategy is co-production. These production companies focus on co-producing projects until they achieve the necessary economic sustainability to develop and sell projects on their own (Castell, 2023).

Both Santibáñez and Castell agree that, whether television fiction production companies are independent or not, what differentiates them most is whether they have elements that facilitate the production of content for foreign platforms, and whether they are aware of the regulations and demands of catalogues and international standards required in the industry at a global level.

Today, independent production companies have greater interference in the creative content, financing, and exhibition of television audiovisual fiction, whether they are dependent on the broadcasting platform or not. Telenovela production companies are the ones that produce with less independence because they rely on the channel for broadcasting, unlike those that produce series that have several platforms where to sell their content. Thus, both the production system and those in charge of structuring and developing television fiction projects have had to adapt to an era where *streaming* and platforms are the future. However, Castell (2023) is critical in this regard, noting that today Fábula is exploring other financing phases so as not to appeal only to financing through direct sales with platforms, since, according to him, the trend in the market is that “the sale of licenses is coming back quite strongly”.

Television fiction production in Chile has evolved from depending mainly on the channels and the “roteros” model to being dominated by independent production companies that have enriched the offer and promoted competition among channels. Although there are differences in size and economic solvency, all production companies in Chile consider themselves independent to some extent. These changes have boosted the development and professionalization of the television fiction industry in the country.

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Introduction

The year 2022 was decisive for Colombia. After the events of 2021, particularly the tension of the social unrest and the broad mobilizations and protests the government and the reforms presented to Congress, the new year brought with it an electoral contest that became the focus of the small screen and, in general, of public opinion in the nation. Thus, together with the faded hope of participating in the sporting event of the year, that is, the World Cup, it was the elections that filled all the reports and interest of the audiences, both in the spaces destined to the debates between pre-candidates and presidential candidates, as well as the results of the 2022 electoral contest in which both the new president of the nation and the members of the congress (senate and house) were elected. After the elections and with the triumph of Gustavo Petro, the country showed an important change in political and governmental tendencies. This was evidenced because in the second round, the current president faced an emerging and unknown figure: Rodolfo Hernandez, who managed to manage a strong presence in social networks (particularly TikTok) as his greatest strength to attract voters. Then, at least until August, the elections became a focus of interest since new scenarios for communication and television fiction appeared, in such a way that a gradual transition towards the environments of social networks began to appear. This generated an interesting contradiction in the panorama of national audiovisual production: being between the possibility of experimentation in independent or public television circuits or being able to seek the visibility of large media platforms and private distribution channels, confronting,

on the one hand, the success in digital scenarios, and on the other hand, the bet for experimental independence or production in the public sector. This would show the tension between a robust and free public media system versus the strong presence of the platforms, being in both the strength and possibility of development of national production, between the experimental and the commercial.

1. The audiovisual context of Colombia in 2022.

1.1. Open television in Colombia

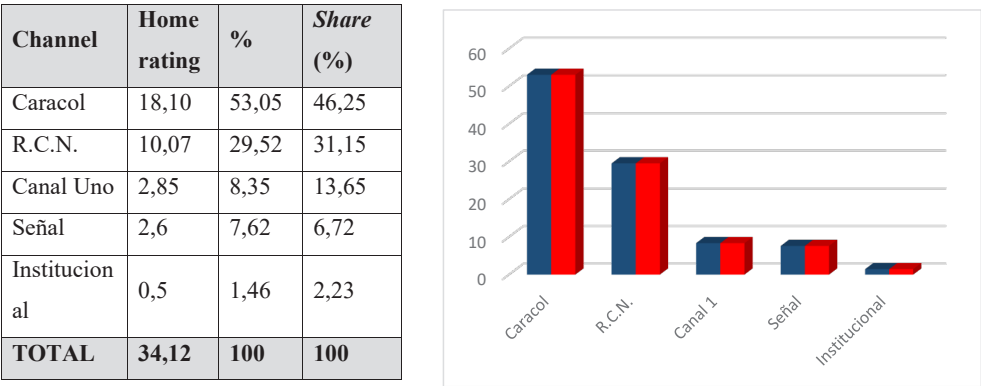
Table 1. National open television channels in Colombia

Private channels (3)	Public channels (2)
Caracol	Señal Colombia
RCN	Canal Institucional
Canal Uno	
TOTAL CHANNELS = 5	

Source: Obitel Colombia

The most open television channels continued to be those of a private nature. Although 2022 began with a wide range of new productions and high expectations on the part of these channels, in the last quarter of the year their ratings declined. However, Caracol was once again the most watched channel, followed by RCN. In the face of this low rating situation, Señal Colombia continues to be a public television alternative that presents interesting, diverse, and different proposals to the programming of the private channels, in addition to making use of the digital offering exclusive content in its VoD system, RTVC Play. On the other hand, no new free-to-air television signal has been reported in the country. It should be recalled that, in view of this scenario, Caracol, RCN, Channel 1 and even regional and local channels continue to offer content as open television, considering that Internet access reaches only 60% of the Colombian population.

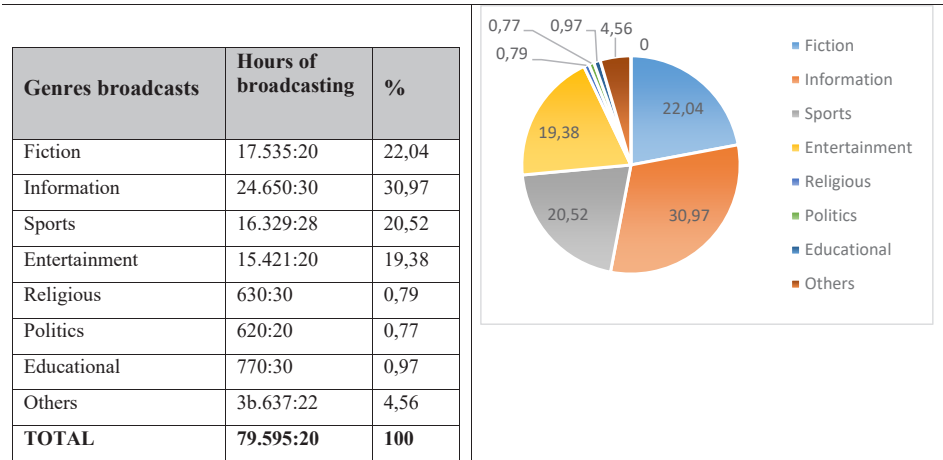
Chart 1. TV share and rating by channel



Source: Obitel Colombia

In 2022, the constant that has appeared in the country’s television in recent years is presented again, with Caracol obtaining higher ratings in relation to what is presented by RCN. This first place is the result of broadcasting strategies and approach to viewers in which events and other modes of contact with audiences were carried out in fiction productions. In the broadcasting of sports events and the World Cup, Caracol was the channel that most successfully connected with viewers, mainly due to its tradition of broadcasting soccer matches. In public television, Señal Colombia continued to grow with its more experimental content and its ability to explore new formats and narratives.

Chart 2: Television genres and hours broadcast by TV programming.



Source: Obitel Colombia

In terms of genres and hours broadcast, which also include the signals of regional channels, it is important to take into consideration the preponderant place that news

programs had throughout the year, as well as those with political themes. This is because the electoral process became the main source of viewers consumption. Fiction occupies, together with entertainment, an important place, so that it is possible to point out that it is a space that was combined with a look at the results, polls and, in general, all the excitement of the election season. In turn, events such as the soccer World Cup showed the importance given by audiences to sports in the country.

1.2. Pay TV and VOD platforms in Colombia

According to the Communications Regulatory Commission (CRC) in Colombia, 54% of people claim to watch subscription television as a priority, 24% do so through analog television and 22% through DTT. In addition, it is noted that the number of subscribers has presented a growth of 4.77%, with 6.3 million as of June 2022, compared to June 2021; therefore, a greater reception in households in the first half of 2022 is evidenced. According to Data Flash (CRC, 2023), by this date the revenues associated with the subscription television service had a scope of almost US\$400 million, which evidenced a growth of 0.46% economic with respect to the same semester of 2021.

The most contracted channels are Caracol Premium, DirecTV and Movistar, in addition to WIN sports, TNT and Fox sports. It is also necessary to mention that in Colombia there are platforms that belong to national channels such as Caracol Play and RTVC Play. For the first half of 2022, 43.3% of the revenues associated to the pay TV service, concerned CLARO, 24.4% to DIRECTV, 18.1% to UNE-EPM, 8% to MOVISTAR, 2.3% to ETB, 1.3% to HV TELEVISIÓN, and the remaining 2.6% is contributed by the other operators.

Table 2. Pay TV Networks in Colombia

The ten most viewed pay TV channels in Colombia		
Channel	Genre	Origin
ESPN	Deportes	Estados Unidos
WIN sports	Deportes	Colombia
Fox sports 2	Deportes	Estados Unidos
TNT	Ficción	Estados Unidos
HBO	Ficción	Estados Unidos
Star Chanel	Ficción	Estados Unidos
AXN	Ficción	Estados Unidos
Disney Channel	Infantil	
Cartoon network	Infantil	Estados Unidos
CNN en español	Información	Estados Unidos

Source: Obitel Colombia

Regarding VoD platforms in Colombia, the most recent reference on the year 2022, in terms of measurement cut-off, was found for the month of June, with data among which it is evident the growth of the supply of services in the country (finding more than twenty options for access to content of different nature, both in the field of large producers and in cases of anime content and other audiovisual offerings). Thus, in Colombia there are approximately 28 video streaming services, including: Netflix, Amazon Prime, Disney+, Star+, Paramount+, Hulu, MUBI, HBOMax, Apple TV, Starzplay, Win Sports+, Claro Vídeo, Crunchyroll, Acorn TV, Dazn, Pluto TV, Free TV, Vix, Plex TV, Tubi TV, Rakuten Viki, Retina Latina, Caracol Play, RTVCPlay, Directv Go, Claro TV+, ETB Play, Movistar Play TV and whose content ranges from a combination of television and film offerings to specialized production in anime and other formats, without leaving aside the services belonging to free-to-air television channels and cable operators. It is important to note that a survey of 3,313 Internet users between 15 and 75 years of age confirmed that 57% of them have changed the traditional way of watching TV, being fundamental the access to offers that are given in multiple systems and, particularly, other forms of audiovisual consumption that include issues such as live streaming and the series format as the preponderant in terms of consumption trends. In terms of consumption in general, it is found that 78% of consumers have a subscription to some Streaming platform. Netflix is the most consumed platform, registering 67% of views, as it offers the possibility of having several screens under a single payment, although it is expected that by 2023 this possibility of shared access will change. It is followed by Primevideo, Disney + and HBO Max, Star+ and Paramount+ respectively.

In the case of VoD in Colombia, in addition to the systems associated with national free-to-air television channels such as Caracol and its Caracol Play platform and the services of cable television providers such as Claro TV, owned by the operator Claro, there is a growing group of more than 15 different platforms, among which RTVC Play deserves a special mention as it offers different programming, since it is not a pay system, but free, and also allows experimentation with genres and formats. Therefore, the offer in terms of public television becomes a content alternative that, although it does not occupy the first places among audience preferences, it does present an important possibility of access to alternative content and that connects with new creative possibilities such as interactive television or production with cell phones, as was the case of the two seasons of *El Inquisidor*.

1.3 Independent TV fiction production companies

In 2022, the audiovisual sector in Colombia faced the challenge of strengthening the way of producing fiction to maintain its number of consumers. Thus, in 2022, the demand for audiovisual content and the number of companies with creative content purposes increased. Colombia has become an attractive place for audiovisual

production, due to the quality of producers and human talent invested in the entire audiovisual process, its geography and landscapes, and the way of narrating local stories with the potential to become universal. Another factor is the support of state laws that stimulate audiovisual production in the Colombian territory, both for national and foreign producers, strengthening the audiovisual industry in Colombia. The growth of the audiovisual industry in Colombia has also been due to the consolidation of public-private institutions that work together to promote the production, promotion, and distribution of projects. Likewise, the training of new talents has been encouraged, which guarantees the continuous progress and success of the industry in the country. Colombian companies such as CMO have achieved a breakthrough for 2022, such as the production of the second season of *Pálpito* for Netflix. According to this production company, its success is because Colombian stories have a local essence, but their characteristics can be recognizable at a global level. It should be noted that the diversification of storytelling and production is an important point for the growth of these independent production companies such as *Mamá Sur*. It is possible to affirm that Colombia has become a sought-after territory for audiovisual production since Colombian stories attract much more international audiences.

1.4. Funding sources of the audiovisual sector

Fiction audiovisual production in Colombia depends mainly on funding resources. In 2022, the call of the Ministry of Information and Communication Technologies (MinTic) “Abre cámara” was highlighted, which granted US\$ 6 million to produce 86 productions in six categories, among which different series to be broadcast on the Señal Colombia channel stand out. These categories included production companies with resources in excess of US\$4 million for 42 projects on different topics, micro, small and medium-sized production companies with resources in excess of US\$741 thousand for 15 products, indigenous communities with resources of US\$250 thousand for 13 contents, black, Afro-descendant, Raizal and Palenquero communities, and Rom communities with resources of approximately US\$250 thousand for 6 projects, non-profit television service operators with resources close to US\$200 thousand for 4 documentary series, and community television service operators with resources of almost US\$200 thousand for 9 documentary productions and transmedia products related to peace issues.

A relevant aspect is the existence of the Film Development Fund (FDC) in Colombia, which is financed through a parafiscal fee paid by exhibitors, distributors, and producers of cinematographic works. These resources are reinvested in the film sector and are of a public nature, subject to the supervision of state control agencies. The FDC was created under Law 814 of 2003, known as the Film Law, and during 2022 offered 4.5 billion pesos in incentives for the creation, production, and distribution of fiction audiovisual content.

Television channels obtain financing from various sources, including advertising. Almost 40% of companies allocate part of their budget to advertising. Most of the advertising investment, 77%, is made through digital media, while the remaining 23% is directed to traditional audiovisual media. Among the digital media most used by companies for advertising are Facebook, used by 62% of companies, followed by Instagram with 58% and YouTube with 16%. However, this does not indicate a decrease in funding, since, although many large companies have directed their resources towards digital media, it is the younger or smaller companies that use advertising on platforms, so investment in traditional media has not varied significantly compared to previous years.

1.5. Communication policies

The main purpose of Law 2213 of 2022 is to improve the justice system in Colombia through the implementation of information and communication technologies, resulting in the consolidation of both audiovisual and digital processes. This law establishes the permanent validity of Legislative Decree 806 of 2020 and aims to streamline judicial processes, facilitate attention to users and address child protection issues more efficiently. In the second quarter of 2022, a review and simplification of the specific aspects related to child protection was carried out, considering the update of the existing regulation on viewer protection and the results of a study on children and audiovisual media.

The Ministry of Information Technologies and Communications Information and Communications (MinTIC) issued the Decree 1263 of 2022, which sets guidelines and standards for the Public Digital Transformation. The objective of this decree is to strengthen the efficiency and proactivity of public entities using information and communications technologies (ICT). In addition, it is framed within the update of the Digital Government Policy, with the purpose of achieving a modern and competitive Colombia through the digital transformation of the State, to improve the provision of services to citizens.

1.6. Digital and mobile connectivity infrastructure.

In 2022, there was growth in connectivity figures in Colombia compared to 2021. Internet access covered 770 thousand more people, representing an increase of 2.2%. Likewise, mobile connections increased by 4.4 million users, equivalent to a 4.4% growth. In addition, the population active in social networks increased by 2.8 million people, an increase of 7.2%.

As for the devices used to access the Internet, 93.9% of users did so through mobile devices, while 80% used laptops and PCs, and 89.2% used smartphones. There were also other devices used, such as tablets, which accounted for 26.4%, and consoles, which accounted for 13.9%. In addition, 30.6% of people connected from laptops or work PCs, while 74.9% did so from personal computers. Regarding

the most visited websites, Google led as the search engine par excellence. It was followed by YouTube in second place and Facebook in third place, these being the most popular social networks.

These data demonstrate the continued growth of connectivity in Colombia in relation to 2021, as presented above, with a significant increase in Internet access, the use of mobile devices and participation in social networks. This has important implications in terms of communication, access to information and the use of various digital platforms.

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

Table 1. Premiere fictions exhibited in 2022

UNRELEASED TITLES – 7 Canal Caracol - 3 <i>1. Arelys Henao: Canto Para No Llorar</i> (Serie) <i>2. Las Villamizar</i> (Serie) <i>3. El Rey, Vicente Fernández</i> (Serie) Canal RCN – 4 <i>4. Leandro Díaz</i> (Serie) <i>5. Te la Dedico</i> (Telenovela) <i>6. Dejémonos de Vargas</i> (Serie) <i>7. Hasta que la Plata Nos Separe</i> (Telenovela)	NATIONAL COPRODUCTIONS – 0 UNRELEASED FOREIGN TITLES – 2 Canal Caracol – 1 <i>1. La Desalmada</i> (Telenovela-México) Canal RCN – 1 <i>1. Te Acuerdas De Mi</i> (Telenovela- México) TOTAL UNREALEASED TITTLES: 9
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Source: Obitel Colombia

TABLE 1b. Reruns Exhibition in 2022

NATIONAL RERUNS – 7 Canal Caracol – 4 <i>1. Nuevo Rico, Nuevo Pobre</i> (Telenovela) <i>2. Vecinos</i> (Telenovela) <i>3. Los Briceño</i> (Serie) <i>4. Las Hermanitas Calle</i> (Serie) Canal RCN – 3 <i>3. Ecomoda</i> (Serie) <i>4. Café con Aroma de Mujer</i> (Telenovela) <i>5. Lady, la Vendedora de Rosas</i> (Telenovela)	FOREIGN RERUNS – 2 Canal 1 – 1 <i>1. La Rosa de Guadalupe</i> (Serie, México) <i>2. La Usurpadora</i> (Telenovela, México) TOTAL RERUNS: 9
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Source: Obitel Colombia

In 2022, there is an equal situation in terms of the number of premiere fictions and re-runs. It is also worth highlighting 2 premieres, typical of the wave of Turkish productions that mainly occupy the afternoon programming in Colombia: *Hercai* and *Kizim*.

Table 2 Premiere National Fiction

Year	Tittles	Episodes	Hours
2018	12	1080	810
2019	11	990	743
2020	8	720	540
2021	9	790	615
2022	7	429	315

Source: OBITEL Colombia

In the last year, national premiere fiction has marked a process that fluctuates between growth and reduction in the number of episodes and times. This is due to the importance of the series format as the preferred format for new productions released in 2022.

Table 3. Formats of national premiere fiction

Format	Tittle					Hours				
	2018	2019	2020	2021	2022	2018	2019	2020	2021	2022
Telenovela	1	4	4	7	2	67:30	270:00	270:00	472:30	54:30
Series	11	7	4	2	5	742:30	472:30	270:00	202:30	260:30
Miniseries	0	0	0	0	0:00	0:00	0:00	0:00	0:00	0:00
Sitcom	0	0	0	0	0:00	0:00	0:00	0:00	0:00	0:00
Unitary	0	0	0	0	0:00	0:00	0:00	0:00	0:00	0:00
Docudrama	0	0	0	0	0:00	0:00	0:00	0:00	0:00	0:00
Others	0	0	0	0	0:00	0:00	0:00	0:00	0:00	0:00
Totals	13	11	8	9	7	810:00	742:30	540:00	675:00	315:00

Source: OBITEL Colombia

In the national case, the year presents a turn towards the series format as the preferred format in the case of premiere fiction.

Table 4. Premiere fiction exhibited in 2022: countries of origin

Country	Tittles	%	Hours	%
NATIONAL (total)	7	72	315:00	71
OBITEL COUNTRIES (total)	2	28	128:00	29
Argentina	0	0	0:00	0
Brasil	0	0	0:00	0
Chile	0	0	0:00	0
Colombia	7	72	315:00	36
Ecuador	0	0	0:00	0
España	0	0	0:00	0
EE.UU. Hispanic	0	0	0:00	0
México	2	28	128:00	32
Perú	0	0	0:00	0
Portugal	0	0	0:00	0
Uruguay	0	0	0:00	0
Venezuela	0	0	0:00	0
COPRODUCTIONS (Totals)	0	0	0:00	0
National Coproductions	0	0	0:00	0
OBITEL Countries Coproductions	0	0	0:00	0
TOTAL	9	100	443:00	100

Source: OBITEL Colombia

The table above shows how national production played a leading role in the 2022 releases in Colombia.

TABLE 5. National fiction formats and Obitel exhibited in 2022

Format	Tittles				Hours			
	Nationals	%	Obitel	%	Nationals	%	Obitel	%
Telenovela	2	16	2	100	54:30	18	128:00	100
Serie	5	84	0	0	260:30	82	0:00	0
Miniserie	0	0	0	0	0:00	0	0:00	0
Sitcom	0	0	0	0	0:00	0	0:00	0
Unitary	0	0	0	0	0:00	0	0:00	0
Docudrama	0	0	0	0	0:00	0	0:00	0
Others	0	0	0	0	0:00	0	0:00	0
Total	7	100	2	100	315:00	100	128:00	100

Source: OBITEL Colombia

The table above shows the importance of the series in television consumption in Colombia, continuing with the trend presented in recent years.

TABLE 6: 10 Most watched titles

Tittle		Channel	Producer (Country)	Format/genre	No. de cap/ep en 2022	Time Zone	Rating	Share
1	<i>Arelys Henao: Canto Para No Llorar</i>	Caracol	Colombia	Serie	65	Prime	20,02	52,01
2	<i>Las Villamizar</i>	Caracol	Colombia	Serie	72	Prime	19,35	38,41
3	<i>Hasta que la Plata Nos Separe</i>	RCN	Colombia	Telenovela	88	Prime	15,61	35,89
4	<i>Leandro Díaz</i>	RCN	Colombia	Serie	63	Prime	15,18	31,35
5	<i>El Rey, Vicente Fernández</i>	Caracol	Colombia	Serie	32	Prime	14,81	32,26
6	<i>La Desalmada</i>	Caracol	México	Telenovela	56	Tarde	5,21	11,35
7	<i>Te la Dedico</i>	RCN	Colombia	Telenovela	107	Prime	5,17	10,56
8	<i>Dejémonos de Vargas</i>	RCN	Colombia	Serie	70	Prime	4,02	9,16
9	<i>Te Acuerdas de Mi</i>	RCN	México	Telenovela	77	Tarde	4,14	8,96
Total of national productions: 7				Original foreign scripts: 2				

Source: OBITEL Colombia

The most watched of the year present a particularity, since, although the table shows this distribution, in which 2 foreign productions appear, their ratings are below other titles with high ratings in the year, since reprises continue to represent a predominant place among audience preferences, a phenomenon that, to a certain extent, is also registered in platforms. Thus, beyond the places indicated in the table, the most outstanding phenomenon is precisely that, in terms of total rating for the year, all of them correspond to Colombian productions, including premiere fictions, 5 reprises: *Nuevo Rico*, *Nuevo Pobre* (17.89), *Vecinos* (17.12), *Las Hermanitas Calle* (16.32), *Café con Aroma de Mujer* (13.56), *Los Briceño* (11.21) and a remake: *Hasta que la Plata Nos Separe*. Once again, Caracol is ahead of RCN in terms of total audience ratings for the year, although in terms of premieres the issue is more even between the two national networks.

TABLE 7: Audience profile of the top 10 most watched titles:
gender, age, socioeconomic status

Titles		Channel	Sex %		Socioeconomic Status %			
			Women	Men	ABC1	C2	C3	D
1	<i>Arelys Henao: Canto Para No Llorar</i>	Caracol	55%	45%	40%	30%	20%	10%
2	<i>Las Villamizar</i>	Caracol	60%	40%	60%	20%	10%	10%
3	<i>Hasta que la Plata Nos Separe</i>	RCN	70%	30%	53%	27%	12%	8%
4	<i>Leandro Díaz</i>	RCN	56%	44%	56%	24%	11%	9%
5	<i>El Rey, Vicente Fernández</i>	Caracol	45%	54%	50%	25%	14%	11%
6	<i>La Desalmada</i>	Caracol	65%	35%	58%	27%	12%	3%
7	<i>Te la Dedico</i>	RCN	70%	30%	55%	28%	13%	4%
8	<i>Dejémonos de Vargas</i>	RCN	55%	45%	52%	31%	15%	2%
9	<i>Te Acuerdas de Mi</i>	RCN	65%	35%	50%	26%	18%	4%

Title		Channel	Age (%)					
			04 - 12	13-17	18-24	25-34	35-49	50-64
1	<i>Arelys Henao: Canto Para No Llorar</i>	Caracol	2%	4%	16%	25%	40%	13%
2	<i>Las Villamizar</i>	Caracol	2%	4%	5%	17%	35%	37%
3	<i>Hasta que la Plata Nos Separe</i>	RCN	2%	4%	11%	20%	38%	25%
4	<i>Leandro Díaz</i>	RCN	2%	4%	14%	21%	38%	21%
5	<i>El Rey, Vicente Fernández</i>	Caracol	2%	3%	5%	13%	38%	39%
6	<i>La Desalmada</i>	Caracol	3%	3%	3%	12%	39%	40%
7	<i>Te la Dedico</i>	RCN	2%	5%	5%	12%	34%	42%
8	<i>Dejémonos de Vargas</i>	RCN	2%	7%	3%	11%	37%	41%
9	<i>Te Acuerdas de Mi</i>	RCN	2%	5%	3%	13%	20%	57%

Source: OBITEL Colombia

It is important to consider that some of the most watched productions, particularly the first ones, also had a presence in VoD platforms. It could be considered that the profiles could be susceptible to modification towards a wider audience with specific interests, as in the case of *Arelys Henao, Canto Para No Llorar*, which was not only a success in open signal and platforms, but also in live shows and concerts organized by Caracol.

3. VoD 2022 Monitoring

The offer in audiovisual content with the advent of the Internet has been changing over the years, and today it seems that traditional media are lagging their biggest competitor: the Internet and VoD platforms. There are opposing data regarding the competition for the number of consumers between traditional television and VoD platforms. The Commission for Regulatory Communications (CRC) indicates that the TV is the device with the most presence in Colombia, as 4 of each 10 households have a Smart TV and 54% of those households mentioned that pay the TV service by subscription, while the remaining percentage have the analog TV services and digital terrestrial television (2023).

In contrast, the global consulting firm BB Media (Andina Link, 2023) in its periodic report “Forecast 1Q-2022 Colombia” presented results that indicate that television consumption has already been surpassed and now the most used media to watch audiovisual content are VoD platforms, this is proven in the report, which states that Colombian users consume an average of 13.6 hours of connected video, compared to 8.1 hours of traditional television per day, on average per family. Although the growth of VoD platforms continues to increase, the acquisition of these services lags when compared to the numbers reported by countries such as Brazil or Argentina (Rincón, 2023). It is essential to consider that, according to DANE, the number of Colombian households with Internet access reached only 60.5%, therefore, it may be one of the complications that consumers have when hiring the service, adding the economic reality of many citizens, therefore, it is more affordable to continue with traditional television.

3.1. VoD platforms market in 2022

The VoD platform market faces several competitors, which bring together a variety of formats. It is worth noting the great prominence of traditional media in countries such as Colombia, where 89.5% of households have at least one television set. Its importance increases given Claro’s control in the sector, being the cable TV operator with the largest number of subscribers, with a total of 46.6% of consumers of the service, an indicator that decreased in the June 2022 report, compared to the June 2021 report. UNE-EPM and DIRECTV complete the top of the pay TV companies with the highest number of subscribers in the country. It is worth noting that 43.21% of subscribers are concentrated in only 4 cities: Bogota, Medellin, Barranquilla and Cali. This is in contrast with departments such as Putumayo, Vichada and Guajira, where there are few users, a structural problem caused by the distance to these cities. An interesting case is that of public television with RTVC Play: a free platform with an offer of premiere, cultural, reprises and children’s content. It is worth mentioning productions that revive successful products from other years, such as *N. N.* and the

creation of new formats, such as *El Cubo*, *El Inquisidor II*, which was created in the first season as an initiative to produce with the use of cell phones and was developed as a fully interactive proposal in 2022, for which it is necessary to register on the page to approach a police story narrated in linear mode as interactive through the use of clues to build the story told in the series. In VoD, the effort of the public media system is something to highlight, since, although it does not monopolize the open rating and it is not possible to clearly access data on the number of subscribers given its free nature, it is an example of the ways in which public television can provide a valid offer and in which there is innovation and new creative proposals for free access to the audience.

3.2. Offer of local VoD platforms in 2022 (national, regional within the country).

Local VoD platforms in 2022 offer a set of elements to be taken into consideration, which again go through the disadvantageous situation between private and public in terms of supply and, despite the interesting experimentation and creative possibilities of national production companies, the little interest and investment in production and content development at local level for VoD systems other than those belonging to large companies dedicated to this model of distribution and content creation. This offers a panorama in which the main alternative offers are agglutinated by RTVC and the public media system, whose platform, as already mentioned, is characterized by its free nature and openness to new formats and experimentations in transmedia, interactivity and renovation of narrative structures, without leaving aside, as has been a trend since 2020, offering contents plagued by nostalgia and referring to telenovelas of the past such as *Los Pecados de Inés de Hinojosa* and series such as *N.N.*.

It is not possible to point out that, in the national case, apart from the VoD offer of public television, with RTVC Play as leader and the offer of content on YouTube or on their own portals by regional channels such as City Tv (private), Capital, TeleAntioquia, TelePacífico, (public) which is restricted to clips or chapters of their productions on screen, but not in specific productions for streaming as in the case of RTVC, there are other bets beyond some independent productions uploaded to YouTube by small production companies more as a free exhibition of content or reel of their products. This happens, to a large extent, due to the existence of multiple offers of foreign and international origin, as well as the existence of possibilities of access to content through shared account systems, offers of access to VoD with pay TV subscription and even some less conventional options such as the sale of accounts to use for days in some stores in the most popular sectors in the country. Likewise, given the growing interest of independent production companies to access the spaces of large platforms, it has not allowed joining efforts to build alternative initiatives in VoD at national or regional level.

3.3. VoD analysis in 2022: national premiere fiction and co-productions.

In national premiere fiction there is a growing offer in which, alongside two of the large global streaming platforms: Netflix and Amazon Prime, there is also the offer of the public media system, which is responsible for contributing projects in which experimentation with the possibilities of handling new narratives and relationships between audiences and television production become the elements to be highlighted as part of a new framework of relationships between consumers and contents. Thus, together with a higher percentage of premieres on pay platforms, the effort made by national public production is important. It should be noted that possibilities of co-productions with production are also beginning to be explored, as is the case of *Noticia de un Secuestro* and, although it does not correspond to fiction, it should also be mentioned that both Prime Video with the series *Mi Selección Colombia* and RTVC with *Nación Rebelde*, have also begun to launch the documentary series format as an alternative for the consumption of contents in VoD systems.

TABLE 7. National fiction and co-productions screened in 2022 on VoD systems

PREMIERE NATIONAL TITTLES	COPRODUCTIONS
Netflix – N° National Tittles 3 1. <i>Arelys Henao</i> (serie) 2. <i>Palpito</i> (serie) 3. <i>Ritmo Salvaje</i> (serie) 4. <i>El Rey, Vicente Fernandez</i> (serie) Prime Video - N° National Tittles 2 1. <i>Primate</i> (serie) 2. <i>Cochina Envidia</i> (serie) 3. <i>Leandro Díaz</i> (serie) RTVC Play– N° National Tittles 2* 1. <i>Reportera Y</i> (serie) 2. <i>El Cubo. El inquisidor II</i> (serie/interactive experience) Total: 9	Prime Video– N° Tittles 1 1. <i>Noticia de un Secuestro</i> (miniserie – Chile - Colombia) Total:1

Source: Obitel Colombia

3.4. VoD narrative features in 2022

In this aspect it is necessary to highlight the way in which, as in other years, the public media system RTVC offers narrative explorations that must be taken into consideration, because although it is not clear how many subscribers it could count on due to its completely free nature, RTVC Play has presented an example of innovation with the series *El Inquisidor*, which went from the technical exploration in

the use of cell phones as recording device in its first season, to the construction of a bet of interactivity in the season titled *El Cubo. The Inquisitor II*. Thus, for 2022, the proposal consisted of offering, on the one hand, a registration system for access to the narrative experience and, on the other hand, to present two modes of content consumption: the linear, with a chapter structure and the interactive, in which through a system of clues, the viewer is led to discover the mystery narrated in the series, so that an interactive process is achieved, in which the viewer can move freely through the narrative and not only present a new structure of consumption and relationship with the audience, but also a new way of narrating in which there is an alternative to the episodic linearity. It is important to note that the VoD series format is an important trend, with short seasons, miniseries or web series in which synthesis and speed were characteristics of the format, without leaving aside the use of humor, as in the case of broadcast television productions.

4. Interactivity and audience participation in digital environments.

Interactivity strategies in Colombia have continued to be characterized by connecting the audience under both digital and analog mechanisms. The biographical telenovela *Arelys Henao: Canto para no Llorar* (2022) produced by Caracol Televisión is a clear example. The actress and singer who played the artist was Mariana Gómez, who at the time expressed through social networks how excited she was to be part of the project. The singer-songwriter Arelys Henao, meanwhile, took advantage of the circumstances to pay tribute to all Colombian women, being a story that speaks about the struggle and denunciation against femicide, machismo and violence, generating that both the artist and the producer Caracol Televisión lead the campaign “#HagámonosEscuchar”, to invite Colombian women not to remain silent in the face of violence. The initiative was supported by 170 female citizens, positioning both the denunciation issues and the telenovela. Another strategy used by Caracol Televisión was to upload to its YouTube channel the artist's songs interpreted by Mariana Gómez, achieving both a greater interaction with the audience and a better appropriation of the content. In addition to this, the telenovela was presented on Netflix, having a great reception on the platform.

In August 2022, the interpreter Mariana Gómez posted on her Instagram a concert to which she was invited by the singer Arelys Henao, who sang several songs. The audience's participation in this event was noticeable, as more than twenty-six thousand users interacted with the publication, not counting the people who attended the concert. The musical anthology telenovela was one of the most successful productions in 2022, so much so that a second installment is rumored for 2023. Now, the exploration of social networks has also left series of famous characters on digital platforms, which proposes new dynamics in which, based on the reception

of the character, audiovisual content is produced that even before its release on VoD platforms are already trending due to the recognition of its protagonists. This is the case of the series *Juanpis González: la Serie*. It stars Alejandro Riaño, who plays Juanpis, a character who has his own talk show, which is attended by major national and international figures, has more than 2.7 million followers on Instagram, 1.9 million subscribers to his YouTube channel and more than 2.4 million views in several of his videos, making him one of the most successful youtubers in the country, which is why Dynamo Producciones in company with Netflix turned this comedy referent into the star of one of the most watched series not only in Latin America, but also in the United States and Canada.

RTVC and Señal Colombia generated interactions with audiences thanks to the series *Nación Rebelde*, premiered in 2022, which not only has the advantage of being free but also includes a web platform with additional clips and a series of podcasts that complement the narrative, which reveals its multimedia nature, showing the openness of the platforms and television to new proposals in terms of content, form and channels used, taking advantage of new technologies. As a result of the publication of the series, *Nación Rebelde* developed an editorial project, which materialized in a 14-episode book, available for free and which, despite not being fiction but documentary, offered an interesting framework for interaction with audiences through the creation of a relationship environment with consumers in different social networks. A separate point is also the case of *El Cubo. El Inquisidor II*, whose commitment to participation was determined even by the very structuring of the narrative and its presentation on screen, through subscription.

Prime Video has also been betting on Colombian products that have generated millions of interactions on the platform, including the adaptation of Gabriel García Márquez's book, *Noticia de un Secuestro*. A co-production that was a boom not only in Colombia, but also in Latin America and proof of this has been the reception of the public, in addition to its nominations in the tenth edition of the Platinum Awards in four categories: best series, best creator of a series, best actress and best supporting actress. In addition, the series *Primate* was very well received in the country, so much so that a new season is planned for this year. In these cases, as in the previous ones, the creation of spaces for dissemination in social networks was fundamental, with spaces dedicated to the productions and which achieved many followers and comments.

In relation to strategies on the part of audiences, it should be noted that, in cases such as *Arelys Henao: Canto para no Llorar*, given the exposure of the fiction and its almost simultaneous premiere on open television and Netflix, not only was it able to impact a large number of audiences, but with the combination with more analog strategies such as concerts and events with the presence of the actress, it also made possible a growing proliferation of fan sites in different social networks, but at the

same time the proliferation of shared content, mainly on Instagram and YouTube (and to a lesser extent TikTok) in which people began to upload their experiences at the artist's concerts and to intertwine them with the viewing of the fiction. Thus, along with the fan sites, content also began to appear that was not precisely focused on the narratives, but also on the artist's music and life, generating a kind of trans-media scenario mediated by the story but at the same time by the experiences of the participants in other scenarios such as the concerts.

5. Highlights of the year

Las The most watched productions in Colombia during 2022 were led by telenovelas and biographical series. These include *Arelys Henao: Canto para no Llorar*, *Leandro Díaz*, *Las Hermanitas Calle* and *El Rey, Vicente Fernández*. In addition to their biographical nature, these series share the theme of music. Here, this issue is raised as an attraction for audiences, where popular music genres are used to capture the attention of the public that identifies with these styles.

This strategy has been employed in national productions for some time. It is worth remembering *Escalona*, *Amor Sincero* and *El Joe, la Leyenda*. It is evident then, the success of using the figure of singers appreciated by the general population to tell stories that audiences like. Although these telenovelas are based on life stories, they also play with a mix of fiction, generally related to melodrama. With this, a more striking narrative is created, which uses emotionality to make sense of the story.

In a second step of popularity, there are productions such as *Café con Aroma de Mujer*, *Vecinos* and *Nuevo Rico Nuevo Pobre*, which can be categorized, in the case of the last two as reprises and the first as a remake. These were very popular telenovelas at the time and were seen again during 2022, both on television and VoD platforms. The use of this type of programs has become very common in Colombia during the last years. The most successful case is *Yo Soy Betty La Fea*, which is the one that ends up tracing a path where it appeals to nostalgia to get the public to watch them again.

However, the situation that arose with *Café con aroma de mujer* is very particular. This is because in 2021 a remake of the original 1994 novel was made. Therefore, both versions, the modern and the original, are presented to the public. In relatively short periods of time and where both are seen by a massive audience. This suggests that, in Colombia, the public enjoys the telenovelas of yesteryear, reinforcing the idea of nostalgic delight.

As for *Las Villamizar*, this novel recovers a story that had already begun with *La Pola*. It tells the story of women who played a leading role in the process of the struggle for independence. These stories emerge from discussions of gender equity and are important to address in the Colombian context, where there is still a patriarchal tendency in certain sectors of society.

Finally, it is necessary to refer to one of the few VoD exclusive productions that had an outstanding reception. This is the case of *Pálpito*, a series that premiered in 2022 and was one of the great successes in terms of novels that year. Presenting a story that touches on themes intertwined with moral dilemmas, and which uses a relatively more complex script than those normally used. These two characteristics made this series so popular during its premiere and, as a result, it was approved by VoD platforms for a second season almost immediately.

This is how the year 2022 was dominated by biographical productions and reprises. Taking popular music and nostalgia as a narrative basis to attract the attention of different audiences and generate identification in them. Without leaving aside the humorous situations and like everyday life, telenovelas show a reflection of Colombian society. The drama, inequalities and love relationships make these productions well received by the Colombian public.

6. Theme of the year: Independent production companies and the internationalization of television fiction production in Ibero-America.

In Colombia, the issue of independent production companies and internationalization presents a tension between the possibilities of success and experimentation in terms of narratives, formats, and options for audiovisual creation. This is largely explained by the growing number of training spaces in the field of film and television, as well as the growth of the national offer for digital platforms and the possibility of impacting open television channels nationwide. It is important to point out that the development of different independent production companies has been boosted, both within the national production itself and through the stimuli provided at governmental level and the growing interest in the development of filmmaking in the nation. In the specific case of television fiction, it is important to state that the greatest spaces for development are found in the opening towards digital and VoD platforms rather than towards private national channels and at the same time the interaction and exploration of other spaces such as social networks and public channels as spaces for the growth of national independent production.

However, although it would seem that this is a favorable scenario, with ASO-CINDE (Association of Independent Film and Audiovisual Producers) and a large number of production companies participating in film and television projects, such as Dynamo, 64 A Films, Rhayuela Films, Dago García Producciones, Oso Films, Alibi Films, AG Studios Colombia, Laberinto Cine y Televisión, Lulo Films, Dramax and CMO Producciones, among others, at the national level, there is a complex paradox between the possibilities of making audiovisual products that can effectively become part of national grids or VoD screens and the eternal experimentation in VoD platforms, among others, what we find is a complex paradox between the

possibilities of producing audiovisual products that can effectively become part of national grids or the screens of VoD platforms and the eternal experimentation in which, before going to the international market, audiovisual production ends up being destined to smaller works and even with a certain tendency towards the institutional and strictly commercial market. Independent production in Colombia presents both strengths and opportunities, but also weaknesses and crises in which, although it is possible to produce series and telenovelas for open signal (in which production companies such as CMO stand out) as well as productions for Netflix or HBO (as is the case with Rhayuela Films and Dynamo), at the same time there is a wide offer of production companies that are limited to works more associated with institutional video, commercials in different formats and the filming, transmission and recording of events, without ignoring the growing number of professionals for whom the path is not always given by the participation in international productions, but in the communication assistance to companies and other areas away from the dynamics of the audiovisual sector.

In the first instance, a look at independent production in Colombia is paradoxical, since, on the one hand, there is the capacity and experience to produce multiple productions in which the possibility of narrative, technical and resource innovation is visible, as well as the management and exploration of multiple creative resources; but, on the other hand, there are several independent production companies that do not have access to the scenarios of large productions but are restricted to markets such as video clips, commercials or institutional productions for government entities and companies. A paradox that also reflects the contradiction between the ample guarantees at the level of legislation for audiovisual production in Colombia and, beyond the competitive nature of the audiovisual sector, the difficulty in accessing production circuits in which opportunities for participation are scarce and, sometimes due to the same technical requests, become complex spaces for small or incipient production companies. In other words, although Colombia has a good number of independent production companies and an important offer of training in film and television, the possibilities of internationalization or participation in large productions are restricted to a few actors in the sector, with the vast majority remaining in smaller productions or in the aspiration to win national calls for proposals from governmental entities for audiovisual producers.

Such a paradoxical situation cannot deny the country's production capacity and, due to the very presence of image and production professionals in the nation, as well as the tradition built in recent years at the level of television fiction and film production and the current legislation on audiovisual matters, the possibility of participation in spaces such as platforms and VoD systems in which, as in the case of Netflix, Prime Video and HBO, participation has been achieved in different productions that, as in the case of the first seasons of *Narcos*, the series *Mil Colmillos*,

and specifically in 2022 bets such as *Primate*, *Cochina Envidia*, and, in the case of co-productions, the award-winning *Noticia de un Secuestro*, make visible the capacity of national production to, as in other times when telenovelas were exported, now it is possible through the capacity of independent production companies or through participation in co-productions, generate the conditions to continue making a presence at the international level. In this aspect, the way in which the large national open television channels, Caracol and RCN, have also established agreements and audiovisual production relationships with streaming giants such as Netflix is also decisive, which also opens possibilities for filmmakers who, from the independent sector, have supported the growth of the audiovisual industry in the country. In this aspect also highlights the support of the public sector, both with legal support and with the existence of calls for incentives to filmmakers, and the possibility of being a space for the realization of productions in which audiovisual creativity prevails.

In television fiction, however, it is necessary to take into consideration that it is not the scenario of greatest interest for the realization of independent production, being widely surpassed by the interest in filmmaking and experimentation in transmedia possibilities or in scenarios such as the fliminuto, Smart films and, as happened at the time with Dynamo, participation in Hollywood productions, as was the case of *Barry Seal* and *Mile 22*. This brings to the narrative panorama an interesting question and it is that, precisely, the rhythms of realization and construction of audiovisual narratives in the case of the series, is connected in a deeper way to the techniques of cinema than to the conditions of television, in such a way that, as Lipovetsky and Serroy (2017) announced at the time, cinema is the basis for the construction of ways of recording, editing and even configuring the fictions that appear in VoD systems, so that rather than episodic or seasonal series, what we find are small films made in installments. This is the case of series such as *Mil Colmillos*, whose aesthetics, audiovisual structure and way of organizing the story corresponded more to a cinematographic bet than to an inheritance with the rhythms of telenovelas from the end of the last century and the beginning of the current one, which although they are still part of the most watched programs in open signal and in streaming, as it happens with *Yo Soy Betty la Fea*, they are quite far from the fast-paced speed, the technical exploration and the use of narrative mechanisms similar to those used in cinema for the creation of tension in the configuration of series and fictions in VoD systems.

The inclination towards the film industry once again puts as a present point the tension existing between the possibilities of experimentation in formats, realizations and explorations of creation of audiovisual productions and the limitations, even budgetary of the smaller production companies in the nation and, as has been pointed out, they have their radius of action in the realization of music videos, institutional, commercials and, in some occasions, the participation in festivals, mainly

of short films or experimental or brief productions, such as those corresponding to formats like Smart Films (short films made with cell phones). In this way, it is undeniable that the nation also has an audiovisual sector full of a large number of production companies, which, for this reason, restrict the conditions of participation in the sector to a few, leaving the challenge of innovating and seeking new expressive possibilities to the production companies that, although equally independent, do not have all the conditions of the more traditional and well-known ones. However, this condition also makes visible those other possibilities for independent production in the country, which lie both in the participation in governmental calls and in the exhibition at festivals (in the case of film projects) and the exploration of other scenarios for the dissemination of audiovisual works, as is the case of social networks such as YouTube and Vimeo, where different kinds of productions by production companies such as Indiana Films and others have circulated.

In the country there are different calls for the realization of audiovisual projects with government funding that allow both small production companies and filmmakers to access financial conditions for the materialization of audiovisual ideas, although all of them within the framework of the themes and searches of the stimulus programs of entities such as the Ministry of Culture. These spaces allow creators, directors and, in some occasions, small production companies, to have access to possibilities of generating contents that, although not specifically in the field of television fiction, become productions with a social and cultural sense of growing importance for the nation. At this same level are also community projects, initiatives led by the academy and other audiovisual production processes that do not go through either the private or public sector, but emerge as spaces for the creation or visibility of productions, as in cases such as the Ojo al Sancocho festival, which has not only been a space for the promotion of alternative film productions, but also becomes a scenario for the encounter with independent production companies, which are not in the more commercial spectrum but, from the communities, also generate content (primarily in film) and reflect other possibilities of creation in the independent sector and that, before the commercial scheme, also seek internationalization through the path of commitment to the social and cultural groups in which their audiovisual proposals emerge. In this aspect, it is also important to point out the way in which, in the case of the public media system RTVC, and mainly in the VoD system, experimentations such as the interactive series *El Cubo*, *El Inquisidor II*, are becoming more frequent.

Independent production in Colombia is therefore a growing scenario that, although it presents a contradiction between the possibilities of internationalization of the production companies with more tradition and screen presence since the times of the preponderance of open television and the smaller production companies restricted to promotional, musical and institutional productions, continues to

show the ample possibilities in Colombia to create narratives, experiment with new formats, achieve international presence in spaces such as VoD and generate other possibilities in areas such as festivals where, as in the case of Smart Films and Ojo al Sancocho, other conditions for audiovisual production appear, whether from technical innovation or community commitment.

In this way, independent production in Colombia offers a condition of growth and expansion that is debated between the success given by the participation in productions for large national networks or streaming companies with international visibility and innovation and experimentation for new narratives and possibilities of realization in which cinema is a starting point and, at the same time, it renews that creative nature and production capacity that characterizes the country since the times when the telenovelas were translated into other languages in other parts of the world, at the same time, it renews that creative nature and production capacity that characterizes the country since the times when telenovelas were translated into other languages in other latitudes and that now, with independent production companies, is making its way again in spaces such as Netflix, Primer Video and HBO. Colombia could not be considered a powerhouse of independent production, but it is possible to point out that it is a growing space in the country, with new horizons to explore and the conditions to build the possibilities to be a reference in audiovisual production and experimentation of new formats and techniques such as the use of cell phones or the creation of transmedia, non-linear or directly interactive narratives.

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ECUADOR: AN APPROACH TO INDEPENDENT PRODUCTION AND THE INTERNATIONALIZATION OF TELEVISION FICTION PRODUCTION

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Introduction

In Ecuador, both the television market and the independent production market have undergone important changes, due to the multiplatform consumption forms, which causes a fragmentation of audiences with more demanding connotations. In this chapter, dedicated to Ecuador, it is shown that Ecuadorian television at the national level continues to be in force through the television companies that have traditionally existed in Ecuador, and even some of these broadcasters are betting on the content of national fiction production and international production through franchises, which allows the involvement of independent producers in collaboration.

According to the study, these efforts have been aimed at boosting the television market in Ecuador, but they do not exactly stimulate independent production, according to the actors interviewed throughout this chapter. In addition, the proliferation of unregistered and unlegalized production companies complicates the standardization of the quality and prices of audiovisual products.

In terms of national fiction on Ecuadorian channels during 2022, only Ecuavisa and TC Televisión will be at the top of the audience ratings and of the total number of leading channels, these channels have a low production of telenovelas and sitcoms of national production, between own productions and co-productions.

This reality is expected to change in the audiovisual industry with the enactment of the La Ley Orgánica para la Transformación Digital y Audiovisual, in force as from February 7, 2023. The Ley de Transformación Digital considers the audiovisual industry as a sector of national interest and establishes a special regime of exemption of duties and taxes for the importation of technical equipment, goods and services. In addition, the is created the Certificado de Inversión Audiovisual in for the benefit of national or foreign production companies.

1. The Audiovisual Context of Ecuador 2023

1.1 The televisión open in Ecuador

The Ley Orgánica de Comunicación del Ecuador, reformed in 2022, recognizes three types of media: public, private and community. In the country, private television channels have traditionally dominated the television market. The first Ecuadorian public channel was created in 2007. The following table shows the classification of the television channels with national coverage that operate to date.

Table 1. Television channels with national coverage in Ecuador

Private channels	Public channels	Seized channels
RTU	Ecuador TV	Televisión del Pacífico (Gama TV)
ECUAVISA	(ECTV)	TC Televisión
Red Telesistema (RTS)		
Teleamazonas		
Telerama		
Televiscentro (TVC)		
UCSG Televisión		
TOTAL PRIVATE CHANNELS = 7 TOTAL PUBLIC CHANNELS = 1 TOTAL SEIZED CHANNELS= 2		

Source: ARCOTEL, 2023.

The private channels that lead the open television market are: Ecuavisa, TC Televisión, Teleamazonas and RTS, according to the annual average rating presented by the Centro TV Internacional (Table 2). It is worth noting that RTS channel in 2021 presented scarce representativeness, its programming strategies did not allow it to enter the audience rating in 2022 of the channels that lead with genres and programs. The same happens with public channel Ecuador Tv, Telerama, Televiscentro (TVC), UCSG Televisión and Gama TV.

Table 2. Comparative television ratings by channel

	Annual Rating 2021	Annual Rating 2022
Ecuavisa	11,86	10,84
TCTV	8,93	10,78
Teleamazonas	8,84	10,82
RTS	7,26	-

Source: Adapted from Centro Tv Internacional. Kantar Ibope Media (2022)

One of the seized channels, TC Televisión, which is on the list of the channels with the highest ratings in Ecuador, reformulated its programming strategies in 2022, incorporating more time to the news genre and, as a second tactic, betting

on entertainment and fiction with soap operas and sitcoms of its own production. In addition to boosting its digital product Tc digital, doubling the number of visits. The introduction and maintenance of self-produced programs were effective strategies that managed to meet the budget (IRC, 2022).

Likewise, Ecuavisa in 2021 with its production company Ecuavisa Studios signed an alliance with Parrot Analytics¹ (2021) to improve the multiplatform television business through data-driven decision making and attract global audiences. That is, to understand the global demand for content creation in the different platforms. Its programming strategy is based on consumer and market data for investment in content and programs.

Teleamazonas also bases its programming strategies on metrics (ratings, consumption algorithms) and based on the results has incorporated international franchises, which has allowed it to be on the list of channels with the highest ratings. It is also emphasized that the fiction genre with acquired telenovelas has not been overwhelmingly successful in attracting attention.

The following table present is the list of fiction programs broadcast in 2022 on television channels with national coverage:

Table 3. Own-produced fiction programs on Ecuadorian channels - 2022

Private channels	Program	Format
ECUAVISA (private)	<i>Tres familias</i>	Sitcom
	<i>Así pasa</i>	Sitcom
	<i>El combo amarillo</i>	Sitcom
	<i>Compañía 593</i>	Soap opera
TC Televisión- seized	<i>Casi cuarentonas</i>	Soap opera
	<i>Puro teatro</i>	Sitcom
	<i>El gabinete</i>	Sitcom

Source: Own elaboration programming schedules of TV channels Ecuador- 2022.

There are few fiction programs of national production on Ecuadorian television in 2022. In recent years, television networks have imported fiction formats, which include mainly soap opera and sitcoms; however, in-house production is still in force. It is worth noting that Ecuavisa Studios in September premiered *Compañía 593*, which until the end of the year remained at the top of the ratings (CTVI, 2022). Also, during the pandemic season in 2020, Ecuavisa produced a soap opera called *Sí se Puede* (TTVNEWS, 2020), which, since its premiere in July, also presented similar results in terms of audience rating (CTVI, 2020).

Finally, a striking case occurred in 2021, with the closure of the company RELAD S.A.², which had the concession to operate Canal UNO also with national coverage,

¹Is a company that explores global demand metrics based on the world's largest audience behavior data set. (Parrot Analytics, 2023).
² “RELAD S.A. is engaged in activities of creating the complete program of a television network for

this decision is established by a five-year debt to the Instituto Ecuatoriano de Seguridad Social, IESS.

1.2 Transition to digital TV

In Ecuador, the first steps for the transition from analog to digital television were taken in the year 2016, despite several proposals and planning the analog switch-off has not been completed in the country. Currently, there are several television channels that have adopted the standard selected for the implementation of digital TV (ISDBT-International, because of the work between the government and private companies.

The following table details the channels and cities where TV is received with digital signal:

Table 4. Channels with digital signal

TV Channel	City of coverage
ECTV	Quito- Guayaquil- Cuenca
Teleamazonas	Quito- Guayaquil
RTS	Quito- Guayaquil
Ecuavisa	Quito- Guayaquil
Telesucesos	Quito
TC Televisión	Guayaquil
Oro Mar	Manta- Portoviejo

Source: MINTEL, 2023

According to a first proposal for the implementation of digital TV in Ecuador, the initial phase should have been completed by December 2016 in the cities with the largest population, and in December 2018 in the rest of the country, however, this plan did not materialize.

In 2020, the Ministerio de Telecomunicaciones y de la Sociedad de la Información MINTEL, again proposes a plan for the analog switch-off, this strategy is part of the TDT Master Plan (transition to Digital Terrestrial Television). “In May 2020, digital transmission will start in Quito and its surroundings. From July of the same year, Guayaquil and its surroundings will be added. By 2022 it is planned to be developed in cities with a minimum of 200,000 inhabitants. Meanwhile, by December 2023, the analog switch-off will reach the rest of the cities. The development of this process includes three strategies:

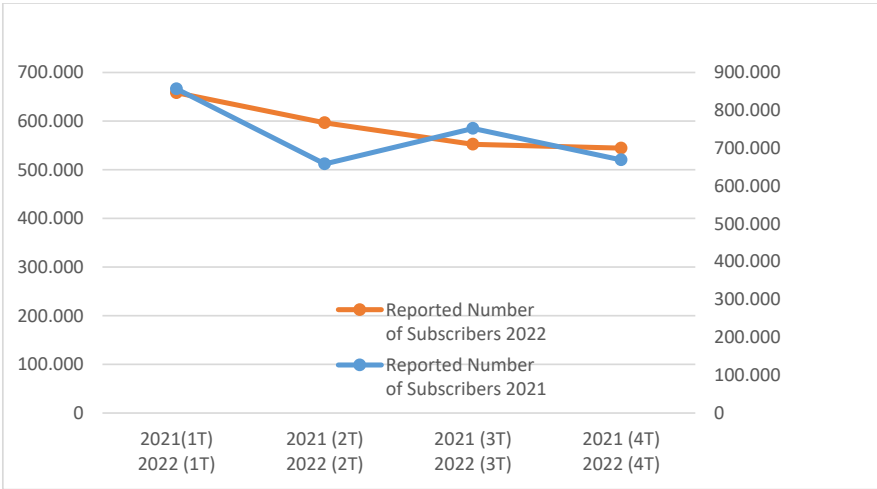
a channel, from the purchase of program components (films, documentaries, etc.) to the in-house production of self-produced program components (local news, live reports) or a combination of the two options” (EMIS, 2023).

- Strengthening of the regulatory environment and conditions to favor infrastructure deployment.
- Promoting the supply of television sets and decoders. In addition, measures to promote the acquisition of such equipment.
- Promotion of new services and contents (MINTEL, 2020).

1.3 Pay TV and VoD platforms in Ecuador

Pay TV in Ecuador has experienced an alarming reduction in the number of subscribers in recent years. In 2022 according to data from the Agencia de Regulación y Control de las Telecomunicaciones del Ecuador (ARCOTEL), it closed with 544,505 subscribers, equivalent to two million users.

Graphic 1. Abonados a la TV de pago en Ecuador 2021- 2022



Source: ARCOTEL, 2022.

The decrease in the number of subscribers is a worldwide trend, marked by the increase of VoD platforms, at more affordable costs for the user. Between 2020 and 2022, the most pronounced drop will be experienced, also due to the arrival of COVID-19, people spent more time at home, which led to the growth of streaming. A recovery in the number of subscribers is not foreseen; data from recent years show a downward trend.

Another factor for the decrease of pay TV in the country, according to the Asociación de empresas de Telecomunicaciones (ASETEL), is piracy, described as “IPTV, which is the illegal sharing or distribution of signals through Internet connections. Particularly, in Ecuador piracy represents 26% of the total pay TV signal, which places it among the eleven countries with the highest piracy penetration in the region, leading to huge losses for the State in terms of revenue and employment generation” (ASETEL, 2022).

According to ASETEL data, in the country, considering only the type of piracy of illegal retransmission of signals, an annual loss for pay-tv operators is estimated at 63 million dollars, and for programmers at 34 million dollars.

The loss due to the growth of piracy is not only for the operators but also for the State due to the decrease in tax collection for this service, which ultimately also affects workers who are linked to the content production sector.

Another factor affecting the decrease in the number of pay TV subscribers is that the user must pay an additional 15% to the value of the service, due to the Special Consumption Tax (ICE), in addition to the 12% Value Added Tax (VAT), which implies an additional 27% payment that falls on the user, making it even more expensive to contract the service.

In Ecuador, the main providers of this service are CNT TV, Claro TV, Direct TV, SETEL, and Cable Satellite TV. The largest number of subscribers corresponds to DirecTV private company with 41.51%; local systems have 26.46% of participation; CNT TV public company has 17.60%, while SETEL S.A. participates with 12.45%, Claro TV has 1.48% of clients and TV Cable Satelital has less than 1% of participation.

1.4 Communication politics's

On November 14, 2022, the reform to the Ley Orgánica de Comunicación (LOC) was published in the Registro Oficial del Ecuador. The initiative arose from President Guillermo Lasso to strengthen freedom of expression and also takes up the debate on the conditions of the actors of the social communication system.

The LOC welcomes international recommendations, encourages the creation of media, and seeks security for the practice of journalism, however, there was concern about a probable setback in the institutionalism and manifestations of diversity, but mainly because it legislates on an analog world that is on its way to the Internet.

New categories such as net neutrality, universal access to the Internet, and transparency are presented, as well as the distribution of state advertising. Article 95 establishes that state advertising must be distributed in thirds: 34% for community media, 33% for commercial media, and 33% for public media. This modification is positively valued since it protects community media.

Another relevant issue is the role of the Defensoría del Pueblo to initiate processes for the protection of rights, in accordance with its competencies, it is specified that the person affected by the messages or speeches published in the media may resort to the Defensoría del Pueblo.

The main aspects included in the LOC reform are:

Voluntary regulation of the media. Although self-regulation avoids submission to the absolutist interests of those in power, it opens the door to the subjectivity of individuals, and perhaps an agreement on quality standards would be a consensual alternative.

Guarantees for communication workers. The State and the media will protect communication workers whose professional activities put their lives at risk. To this end, the Consejo de Desarrollo y Promoción de la Información y Comunicación will elaborate and coordinate with the respective institutions, public policies, protocols, projects, plans and programs.

Freedom of expression and the Internet. The State shall guarantee freedom of expression on the Internet, the LOC does not regulate expressions or opinions issued on social networks.

Prohibition of prior censorship and subsequent liability. In correspondence with the Standards of the Inter-American System for the Protection of Human Rights in matters of freedom of expression, the LOC states that prior censorship by an authority or public official, who in the exercise of his duties or in his capacity approves, disapproves, or vetoes the contents prior to its dissemination through any means of communication is prohibited.

Protection of identity and image.

Public media. The LOC includes a section to deal with public media. By their nature, their mission is to provide public services related to information, communication, education, and cultural training.

Political for community media

Administration of the radio spectrum. The LOC specifies that the radio-electric spectrum is a public property of the State, unalienable, inalienable, and unseizable. Therefore, the State reserves the right to administer, regulate, control, and manage it.

Another highly relevant regulation that has a direct impact on the audiovisual industry is the, Ley Orgánica para la Transformación Digital y Audiovisual effective as of February 7, 2023.

The Ley de Transformación Digital (articles 24 to 31) considers the audiovisual industry as a sector of national interest and establishes a special regime of exemption of duties and taxes for the importation of technical equipment, goods, and services. The import of equipment and payments and fees for audiovisual production services for those who have tax residence abroad are exempted from ISD; income tax on payments abroad is also exempted; and Value Added Tax, VAT, for digital services related to any phase of the production of audiovisual content, is also exempted.

One of the most important points is in Article 29:

“The Audiovisual Investment Certificate (...) is created in favor of national or foreign production companies, for 37% of the costs and expenses incurred in Ecuador in audiovisual and logistical services required, provided they are supported by valid sales receipts”.

The Certificado de Inversión Audiovisual is a security that may be used as a tax credit and will not be taxable or subject to withholding.

With these incentives, Ecuador improves its cinematographic competitiveness and generates the possibility of developing a market that was unattended. It provides the opportunity for foreign investment for different audiovisual productions with the implementation of resources.

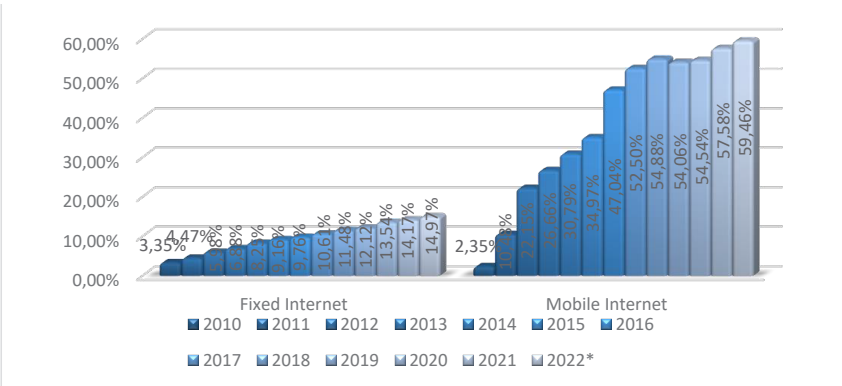
It should also be considered that tax incentives allow foreign audiovisual companies to invest in the country, generating employment for those who work in professions related to the audiovisual field.

Although there are criticisms regarding the role of the State and a liberal perspective of public politics, it is recognized that cinema and audiovisual creation require to complete the production and distribution chains, in addition, another of the arguments pointed out in the debate on the law was the multiplier effect of the audiovisual industry in sectors such as hospitality, gastronomy, construction, decoration, textiles, among others.

1.5 Digital and mobile connectivity infrastructure

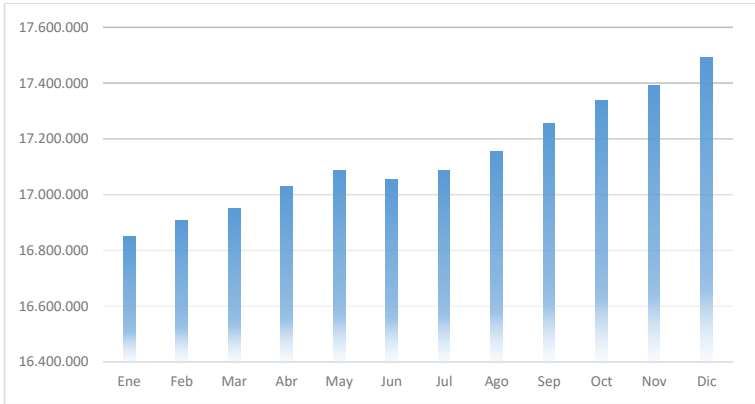
The number of fixed Internet subscribers in 2022 stood at 14.97% of service penetration, the trend is to increase by one point per year. The Ecuadorian population demands mobile internet service to a greater extent, reaching 59.46% in 2022. According to data provided by ARCOTEL, in 2022 the total internet penetration in Ecuador reached 13,390,898 million, representing 74.44% of a population of 17,989,913 inhabitants.

Graphic 2. Fixed and Mobile Internet for each 100 inhabitants



Source: ARCOTEL, 2022

Graphic 3. Active mobile lines 2022



Source: ARCOTEL, 2022

The mobile telephony sector continues to grow exponentially (Graph 3). In 2022 it reached 17,490,751 active lines, which represents a penetration of 97.23%, in a country of 17,989,912 million inhabitants. It is important to note that the consumption of audiovisual content, news, entertainment, social networks, etc., is done precisely through mobile devices. The main service providers are: CONECEL which leads the market with 51.61%, OTECEL has 31.17% of users, and CNT public company, which participates with 17.22% of customers.

2. Independent production

The independent audiovisual production constitutes one of the fundamental pieces in the context of creative industries, of the orange economy, which in parallel enables cultural exchange, identity presence, local economic activation with the generation of employment and attraction of investments. Audiovisual production, in each country, generates a new informational ideology, commercial homogenization that matches the phenomena that have arisen on the Internet and that make it possible to internationalize the local and reinforce identity. It is from this duality that emerges an appreciation for cultural and fictional products and contents with characteristics of proximity, contemplating the possibility of a universal look the internationalization of audiovisual works.

In Ecuador, independent production is associated with the television industry. These media of information, entertainment, and education, public or private, require compliance with the provisions of the Ley Orgánica de Comunicación (2019) in relation to the quota of independent production in their programming grids, therefore, “the activation of this sector remains a priority, as well as the development of pre-production, production, post-production and distribution of content” (Ulloa, 2022).

The audiovisual sector, until the close of 2019 in Latin America produced an investment of “5.7 million dollars in audiovisual productions with more than one million direct and indirect jobs” (BID, 2021). However, this economy like others was affected by the arrival of the pandemic, which forced to paralyze the exhibition of films and production in the first months of confinement. The audiovisual sector was one of the hardest, therefore, in Ecuador the “guilds of the different trades in the audiovisual sector” were given the task of developing a “Working Protocol for the production of audiovisual and cinematographic works” (IFCI, 2020), endorsed by the Ministry of Culture and Heritage, to continue with the activity and support the emergence of independent production companies in areas of lower population density. These turned to producing fiction to serve the global digital market connected through networks and platforms that they incubated since 2016, breaking the concentration scheme that was traced with the traditional national television business.

The definition of an independent production house (*indies*) according to the Ministerio de Cultura y Patrimonio del Ecuador in 2014 and the Ley Orgánica de Comunicación - LOC (2019) is:

“a natural or legal person who does not have an employment relationship or kinship relationship up to the fourth degree of consanguinity and second degree of affinity, nor a dominant corporate or commercial relationship with the audiovisual media to which it licenses the broadcasting rights of its work”

Also, in Section II. National Production, national production is defined as the dominant corporate or commercial relationship when:

“1. “The independent national producer and the audiovisual media belong to the same economic group; 2. The same person owns more than 6% of the social capital of the audiovisual media and of the production company.

There will be a link between the independent national producer and the owners, legal representatives, shareholders, or majority partners of the audiovisual communication media when there is a kinship up to the fourth degree of consanguinity or second degree of affinity.

Production companies, with foreign capital or that depend on a foreign company in terms of its executive bodies, its social capital, or its business strategy, shall not be considered independent national producers” (LOC, 2019).

The development of production in Ecuador, according to producers Tapia (2021 and Mancero 2021), has become very competitive and with fewer possibilities for teamwork between production companies. “According to figures from the Instituto de Cine y Creación Audiovisual there are 50 registered film and audiovisual production companies in Ecuador, mostly located in Quito, Guayaquil and Cuenca constituted under a Legal Society, Anonymous or Limited Company” (ICCA, 2022). An

additional fact is the proliferation of production companies that are not registered with the Superintendencia de Compañías, which further complicates the standardization of quality and prices of audiovisual products. This point is of fundamental importance because, while the internal problems between production companies, legalization, etc. are being solved, platforms such as Netflix continue to offer a diverse and innovative offer, catering to the tastes and preferences of audiences. The film and television production companies in the Listado Ecuatoriano de Cine Audiovisual LEA (2022) are the following:

Table 5. Audiovisual production companies by province in Ecuador

City	Frequency	Percentage
Azuay	5	5,3 %
Guayas	14	14,9 %
Imbabura	4	4,3%
Loja	2	2,1%
Manabí	2	2,1%
Pichincha	67	71,3%
TOTAL	94	100%

Source: LEA 2022

The Ecuadorian production companies serve the television market, the platforms, and companies that require audiovisual products for their programming and marketing strategies. However, it should be noted that these companies contribute to the production of television fiction in Ecuador, which is growing exponentially, even though few broadcasters invest in this type of production. The greatest economic effort of the television channels is allocated to the news and sports genre up to the year 2022, which historically have been the star products that attract financing, according to the annual rating collected by Centro TV Internacional (Table 6).

Table 6. Ecuador Television Ratings

Genres	Average rating 2021	Average rating 2022
Informative	10,26	10,83
Film Fiction	10,32	10,79
Entertainment	10,33	10,79
Fiction soap opera	10,29	10,81
Sports	10,07	10,91

Source: Centro TV Internacional Kantar Ibope Media (2022)

The Ecuadorian producers who are part of this dynamic indicate that in order to produce, it is necessary to invert, and the pre-production work consists of obtaining

financing, which sometimes comes from the production companies themselves, private investment, television channels or public funds. It is also necessary to consider the requirements with the equipment, which in some cases is established with the rental of cameras, with values ranging from one to two thousand dollars per day of shooting or, failing that, to acquire cameras with a value of fifty thousand dollars, accessing the most economical one. In addition, both producers and actors play different roles in the same shoot to minimize costs. Producers emphasize that economic, technical, and technological issues can be solved. What is needed in Ecuador is to rethink the training of professionals (Tapia, 2021).

These arguments coincide with the lack of innovative content creators following the new audiovisual trends. In Ecuador there is talent, however, there are two issues that influence audiences not to be attracted to national products: good content, production conceived and planned according to industry standards. “In addition to this, there is the lack of budget, economic support from the public and private sector and the “solid stories that influence our output to international displays “ (Mancero, 2021).

In Ecuador, production companies diversify their activity with a variety of services related to audiovisuals, so they are not exclusively dedicated to producing content for television. However, in the LEA around 13 affirm that they are production companies for TV programs and other additional services

Table 7. Production companies that produce television programs

Name	City
Leblev s.a.	Guayaquil
Productora audiovisual útero films s.a.	Quito
Laofipro Cia. Ltda.	Quito
Blackbird studios s.a.	Cuenca
Sin filtro films sas	Quito
Espectral	Quito
Fundación máquina de cine	Quito
Pif ecuador s.a.	Guayaquil
Urbano films	Quito
Corporación de investigación educación y arte indígena bicultural runa pacha sapi rupai	Otavalo
Xanadu films	Quito
Llamingo films s.a.	Quito
Epopeya s.a.	Portoviejo

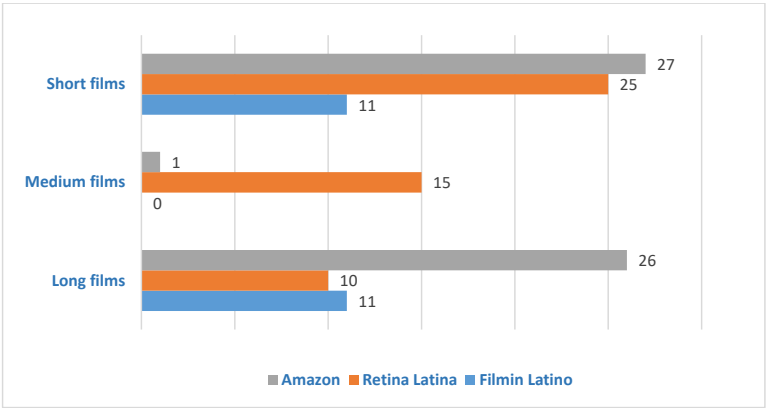
Source: LEA, 2022

Most of these production companies are in Quito and Guayaquil, this the second most important city in the country, due to the fact that in these territories are concentrated: television channels with national coverage that require the services of

audiovisual production companies; actors, and actresses; acting training schools; business concentration and industrial activity.

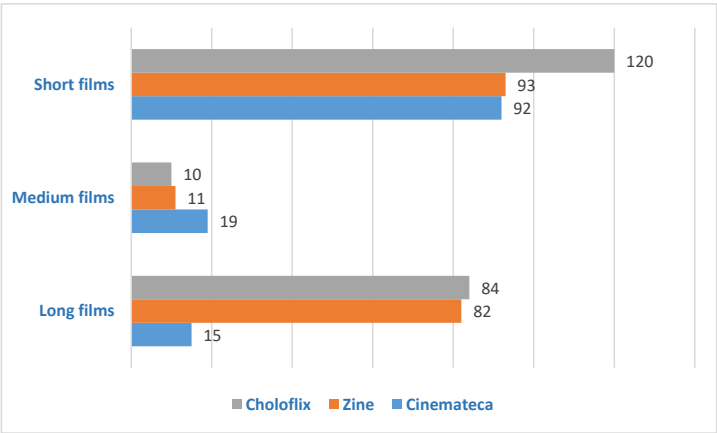
On the other hand, in the Video on Demand (VoD) business, independent production companies have managed to insert in international platforms: feature films, medium-length films, and short films. The largest number (54) on Amazon, (27) on Retina Latina, and 22 on Filmin Latino (Graph 4). In national VoD platforms, the one that hosts the largest number of works (247) is Cholofox, followed by Zine with 50 works and Cinemateca with 22 feature and short films (Graph 5). Some of these works are shown on Ecuadorian television.

Graphic 4. International VoD platforms with the highest number of Ecuadorian films



Source: IFCI (2021)

Graphic 5. National VoD platforms with the highest number of Ecuadorian films



Source: IFCI (2021)

In Ecuador, financing policies establish the delivery of 25% and 30% of economic support for the making of a film, documentary, etc., allocations that have not suffered budget cuts, but have not been fixed, according to Camilo Luzuriaga (2021), one of the first filmmakers in Ecuador.

Luzuriaga urges to review the support to the processes of creation and production, that is, to strengthen the relationship between creators and local companies and the second aspect is to improve the relationship with international audiences and support in the promotion and diffusion. From the declared sources of income, we can mention that in Ecuador the business model for the audiovisual sector is mixed.

With the enactment of the Ley Orgánica de Cultura y Patrimonio in 2016, the Ley de Cine that supported film production in Ecuador was repealed. This legal protection was not enough, constant non-compliance with the Ley Orgánica de Cultura was evidenced, which led to the suppression of the Instituto del Cine, ICCA, and the budget cut for competitive funds and specifically, in the year 2022 that there was no call, strongly affecting these decisions to the sector.

According to the Observatorio de Políticas y Economía de la Cultura, in recent years there has been a decrease in national production.

“In the cinematographic field, from 38 feature films produced in 2017, only 18 will be produced by 2021. On January 15, 2023, the Association of Film Directors and Screenwriters and several guilds of the audiovisual sector issued a statement in which they expressed: “Film and audiovisuals in Ecuador are dying, they survive as best they can, and the country is becoming the only one in the region that does not stimulate the development” of the audiovisual industry (OPEYC, 2023).

2.1 Type of formats genres, and narratives

The talent and creativity in Ecuador are diverse. Cultural management and promotion concentrate their efforts in the most densely populated cities. It should be remembered that local stories of proximity bring audiences closer and reinforce identity traits and strengthen plurality, diversity, and dialogue.

There are stories to tell, but there is a need to make films that meet the quality requirements, with international standards (Luzuriaga, 2021). This first generation had difficulties in making films between the 70s, 80s, and 90s. It is since the year 2000 that film production is sustained and with a certain presence, more people making films. But, even so, they are two decades of learning and Ecuadorian producers still need to learn (Luzuriaga, 2021).

The strengths of the *indies* and of Ecuadorian cinema are the image, photography, art, and scenery, the sound and musical tradition with its different European, African, and Andean aspects, and potential strengths. The weakness, in Ecuadorian production, is the scarcity of dramatic tradition, of direction. Basically, in the

independent fiction production, it is also the actors, who do not have the power of the northern industry. The public is used to that acting and dramatic strength, very strong scripts, dialogues, and creative plots.

From the actors' point of view, it is argued that talent exists, and for its development, two aspects should be pointed out: the concentration of resources, most of which remain in the capital city; there is no equitable distribution. The second aspect is related to the slow development of cinema. Thus, independent films that are extraordinary in theaters are not given the opportunity to be shown on television. With the Communication Law, this reality was reformulated, but there is still a preference for international films over those produced in the country (Carpio, 2021).

Among the challenges of Ecuadorian independent production is the economic factor. The lack of public investment and the amount of allocation for competitive funds, what have affected in recent years (Luzuriaga 2021).

“According to the Instituto de Cine y Creación Audiovisual (ICCA), today merged with the Instituto de Fomento de las Artes, Innovación, to create the Instituto de Fomento a la Creatividad y la Innovación, there are 42 audiovisual projects that report losses of USD 1.2 million. These projects involve 250 actors and 749 people between technical and administrative staff” (El Comercio, 2020).

Added to this is the decrease and stagnation of the amount allocated to encourage national audiovisual production, which went from two and a half million to one and a half million and with financing percentages of 20% and 30% of the total cost of the work.

In summary, the producers and actors interviewed mentioned that another of the issues affecting the development of *indies* is the concentration of resources and the lack of proper democratic management so that funds are allocated equitably and reach the less densely populated cities. Creativity, stories, and landscapes are one of the advantages that Ecuador has, the weakness according to experts is the scarcity of dramatic tradition, it is accentuated in the direction of actors that should be promoted, recurring resources in the works that are on the Netflix platform. There are Ecuadorian actors recognized abroad and demanded by production companies, however, the results of exporting talent on a large scale is a pending task, and the acting impulse through state strategies is one of the recommendations.

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MEXICO: TELEVISAUNIVISION AND THE INTERNATIONALIZATION OF TELEVISION FICTION PRODUCTION; BETWEEN GIANTS AND INDEPENDENT AGENCIES

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Introduction

Following three years of global changes and restrictions brought about by the COVID-19 pandemic, life has returned to normal. Nevertheless, there have been notable alterations in audiovisual consumption practices compared to the pre-pandemic era. In the context of Mexico, the implementation of televised school classes had potential for a greater success. However, the pandemic forced thousands to millions of individuals from low-income backgrounds to acquire internet services and even engage in streaming for virtual courses. This accelerated the learning process and necessitated the use of mobile platforms and devices.

In 2022, the Soccer World Cup took place in Qatar, drawing the attention of viewers worldwide. Audiences opted to watch the matches on television via open television and streaming platforms that provided live game broadcasts. Specifically, Televisa, a prominent company, secured exclusive rights to transmit World Cup matches on the internet. Its newly established Vix platform exclusively aired 30 matches, while eight games were broadcast on Vix+. The remaining matches were accessible through open TV and satellite services like SKY. However, a few weeks after the conclusion of the World Cup, Televisa faced legal action from investors, including Palm Tran Inc., Amalgamated Transit Union, Local 1577, Pension Plan of Atlanta, among others. The investors accused Televisa of engaging in corrupt practices, alleging that the influential Mexican company had bribed FIFA to obtain exclusive rights for four World Cups (2018, 2022, 2026, 2030). To resolve the lawsuit, Televisa agreed to pay a settlement amount of 95 million dollars.

The recently formed conglomerate of TelevisaUnivision, comprised of familiar entities, has emerged as a significant transnational powerhouse in the realms of open television and competition with Subscription Video on Demand (SVOD) services in Mexico. By integrating the content from both dominant television corporations in

the Americas, they aim to cater to the Latin American market as well as the Hispanic market in the United States.

Meanwhile, the political landscape in Mexico is undergoing a growing polarization. With federal and state elections scheduled for 2024, it is anticipated that media coverage will heavily focus on the electoral process. Moreover, attacks by certain candidates, particularly those belonging to opposition parties against Morena, the ruling party led by Andrés Manuel López Obrador (AMLO), are expected to take center stage. AMLO himself has persisted in targeting media outlets and journalists unaffiliated with his government, often divulging private information about them. This was evident in a recent incident during one of his “mañanera” sessions, where AMLO disclosed the income of Loret de Mola, with whom he has been engaged in a prolonged media feud characterized by mutual attacks and attempts to discredit one another.

A significant issue in Mexico pertains to forced disappearances, with over 109,000 reported cases. Another pressing concern is gender violence and femicides. Tragically, ten women are killed every day in Mexico, yet the federal government dismisses various feminist movements, and acts of violence and femicide are not adequately addressed, much less resolved. Furthermore, violence against journalists in the country continues to escalate. In 2022 alone, 17 journalists were brutally murdered in Mexico, making it one of the most perilous places worldwide to practice journalism.

1. The Audiovisual Context of Mexico in 2022

1.1. Open television in Mexico¹

A new concession for a fourth open television channel has yet to be launched. Cadena Tres, the concessionaire of Imagen TV, became the third private channel with national projection in 2015; however, according to information from the Federal Institute of Telecommunications (IFT), the chain only has a reach in the national territory of 71.67%. At the end of 2022, Imagen TV obtained an extension of 24 months to achieve nationwide coverage since the concession granted to this obliges it.

¹ Graphs 1 *Rating and Share by station* and 2 *Genres and hours transmitted in TV programming* are not presented this year in this chapter because the necessary information for their preparation was not obtained.

Chart 1. National open television networks/channels in Mexico

Private networks/channels (3)	Public networks/channels (2)
Televisa (Channels 2, 5, 9 & Foro TV)	Once TV (Channel 11 & 11.1)
TV Azteca (Channels 1, 7, Adn 40 & A+)	Conaculta (Channel 22)
Imagen Televisión (Channel 3)	Channel 14
TOTAL NATIONAL NETWORKS/CHANNELS = 12	

Source: Obitel México.

1.2. Pay TV and VoD platforms in Mexico in 2022

In the last yearbook, we mentioned that pay TV is decreasing in terms of the number of subscribers. The strong presence of streaming platforms significantly affects companies that offer pay-tv services. Some data indicates that this has reduced its participation in the Mexican market by ten percent, from 45 to 35%.

Information provided by the Federal Institute of Telecommunications (IFT) indicates that the consumption of paid television channels remains at 23%. Disney Channel, Discovery Channel, De Película, and TNT, are the most watched channels. This information was obtained according to a National Survey of Consumption of Audiovisual Content carried out in 2022, and those surveyed indicated the following among the reasons for contracting pay television: “to have more options for content and channels” (28%); “for distance classes” (26%); and “being able to contract other services such as telephone or internet with the same provider” (20%). Among the reasons for not contracting this service, 49% of the people surveyed mentioned that it is because of the price, and 31% that they watch little television. The channel “De Película” also stands out in the report, where Mexican films from the golden age are broadcast.

The data available when writing this chapter on the rating of pay TV channels are those provided by Statista in 2021, presented in the 2022 yearbook, so we reproduce them in Table 2. Together with the two sources mentioned, we observe that the preferred channels of Mexicans who access pay TV are those that broadcast movies, sports, and children’s programming.

Chart 2. Pay TV Channels in Mexico

10 most watched pay TV channels in Mexico			
Channel	Genre	Country	Ranking
Star	Fiction	USA	35%
Discovery Channel	Information	USA	33%
Fox Sports Mexico	Sports	Mexico	16%
History Channel	Information	USA	13%
TNT	Fiction	USA	12%
National Geographic	Information	USA	10%
Golden	Fiction	Mexico	10%
Disney Channel Mexico	Children	Mexico	9%
ESPN	Sports	USA	9%
Cartoon Network	Children	USA	9%

Source: Statista (2022)².

At the end of the second quarter of 2022, in the country, according to the streaming market report from the consultancy *The Competitive Intelligence Unit* (CIU), Netflix continues to dominate the market with a 61.1% share; followed by Disney +, with 12.8%, still very distant but above the other two competitors such as HBO Max, with 10.3% and Amazon Prime with 7.6% of the market. Thus, Netflix still dominates the market with more than four times the share of Disney, its closest competitor.

The leading SVoD platforms in Mexico are Blim (now Vix and Vix+, Mexican); Casa Caníbal (Cannibal Cinema, Mexican); Movistar+ (Telefonica); Star+ (Walt Disney Company); HBO Max (Warner Bros. Discovery); Apple TV (Apple Inc.); Netflix; Cinépolis Klic (Ramírez Organization, Mexican); Disney+; Claro-Video (América Móvil, Mexican); DAZN (Perform Group); Pluto TV (Paramount Global); Prime Video; Paramount+; Acorn-TV (AMC Networks); Curiosity Stream (Amazon Prime); Crunchyroll (Sony Group Corporation); Filminlatino (IMCINE, Mexican); FoxPremium; Tubi (Fox Corporation); Mubi; cinema platform; Fox Play; YouTube.

The vast majority come from the capital of US companies. However, some national companies such as Claro-Video also stand out; while offering catalogs with independent film content, Casa Caníbal and Filminlatino stand out, the latter dedicated mainly to providing content on Mexican cinema, administered by the Min-

²To access data go to: <https://es.statista.com/estadisticas/1188311/canales-television-paga-mexico/>

istry of Culture and the Mexican Institute of Cinematography (IMCINE). Likewise, Plataformacine also presents Mexican films on demand since it does not require a subscription; instead, the user pays for the content they see. In addition, the platform offers movies for free consumption.

1.3. Sources of financing for the audiovisual sector

2022 was a year of financial recovery for Televisa after three years of suffering the effects of the COVID-19 pandemic. Reports indicate a 493% increase in net benefits, with a profit of 43.628.8 million pesos (about 2.181.44 million dollars), after the merger with Univision and its presence in other businesses. Profits come from its various companies, including movie distribution.

In the fourth quarter of 2022, concerning TelevisaUnivision, had an increase in advertising by 10% and 47% in subscriptions and licenses. While for the second most important private television station, TV Azteca, the year 2022 was not good at all: there was a collapse because, due to the drop in advertising, the net profit of the television station in the third quarter fell by 96% since it only earned 4 million, compared to the 102 million it had obtained in 2021. Therefore, television stations need help regarding advertisers, given the diversity of ways products can now be advertised.

On the other hand, we are increasingly seeing the product placement strategy in television fiction. While streaming, Vix offers free content but with ads. Netflix also provides a cheaper basic package but with commercials, so the audiovisual industry looks for models to make a profit. However, it is increasingly diversifying into other more affordable channels and platforms that are also powerful in reaching the consumer.

An essential source of income for television stations is what they receive from official advertising. The two television stations that have received the most money for this concept from the government of Andrés Manuel López Obrador are Televisa (933 million pesos / 51.8 million dollars) and Televisión Azteca (848 million / 47 million dollars).

1.4. Communication policies

With its entry into the mobile market, the Federal Electricity Commission (CFE) ventures into telecommunications and the internet, offering prepaid plans starting at 30 pesos (1.5 USD), 40 GB of the internet, and 250 minutes of calls. With this, there will be access to the internet throughout the national territory, especially to those sites that were disconnected. The AMLO government will install 5.000 antennas to expand network coverage for all of ALTÁN, which is why the Altán + CFE alliance seeks to guarantee internet for all, especially the most remote towns, usually rural ones; This initiative aims to reduce the digital divide. The country experienced

an increase in internet use in the context of the pandemic, from 69.6% in 2017 to 75.6% in 2021 (INEGI, 2022). However, the digital divide is perceived between urban households (74.2%) and rural households (40.3%), a very considerable percentage in terms of access³.

1.5. Digital and mobile connectivity infrastructure

In Mexico, by 2022, there was a notable increase of 16 million internet users. From 82.8 million in 2021, it went to 98.6 million (Statista, 2023)⁴; this is a considerable increase. However, there are still almost 30 million people who still need access. With the arrival of CFE in the telecommunications field, this gap is expected to be reduced. Men are the ones who connect the most (51.8%) while women a little less (48.23%). Users connect through smartphones (95%) and computers (42%), while digital television is gaining more space (23%) for connection every day. The hours in which they connect the most are in the afternoon-night. 83% percent of users maintain an active account on Facebook, but Tik Tok is gaining more users daily, especially in the youth sector (Infobae, 2023)⁵.

³ See information at <https://www.evaluare.mx/2023/01/28/brecha-digital-politicas-publicas-y-acceso-a-internet-en-mexico-como-vamos/>

⁴<https://es.statista.com/estadisticas/1171866/usuarios-de-internet-mexico/#:~:text=En%202022%2C%20se%20estim%C3%B3%20que,de%20usuarios%20registrados%20en%202021>

⁵ <https://www.infobae.com/educacion/2023/03/29/como-son-los-habitos-de-los-mexicanos-en-internet/>

2. Analysis of the year: National and Iberoamerican premiere
fiction on open TV

Table 1. Premier fiction titles broadcast in 2021
(national, foreign -OBITEL area-, and coproductions)

National premiere titles: 30 Televisa: 25 national titles 1. <i>Amor Dividido</i> (telenovela) 2. <i>Los Ricos también Lloran</i> (telenovela) 3. <i>El Último Rey. El Hijo del Pueblo</i> (series) 4. <i>Corazón Guerrero</i> (telenovela) 5. <i>La Herencia</i> (telenovela) 6. <i>Mujer de Nadie</i> (telenovela) 7. <i>Vencer la Ausencia</i> (telenovela) 8. <i>La Mujer del Diablo</i> (series) 9. <i>La Madrastra</i> (telenovela) 10. <i>Mi Secreto</i> (telenovela) 11. <i>Cabo</i> (telenovela) 12. <i>Mi Camino es Amarte</i> (telenovela) 13. 15. <i>Como Dice el Dicho</i> (unitary) 14. <i>Esta Historia me Suena</i> (unitary) 15. <i>La Rosa de Guadalupe</i> (unitary) 16. <i>Corona de Lágrimas</i> (telenovela) 17. <i>Una Familia de Diez</i> (sitcom) 18. <i>Vecinos</i> (sitcom) 19. <i>40 y 20</i> (sitcom) 20. <i>Tal Para Cual</i> (sitcom) 21. <i>Relatos Mascabrothers</i> (sitcom) 22. <i>Renta Congelada</i> (sitcom) 23. <i>Perdiendo el Juicio</i> (sitcom) 24. <i>¿Tú Crees?</i> (sitcom) 25. <i>Albertano Contra los Mostros</i> (sitcom) TV Azteca: 5 national titles 26. <i>Un Día para Vivir</i> (series) 27. <i>Lotería del Crimen</i> (series) 28. <i>Rutas de la vida</i> (series). 29. <i>Lo que la Gente Cuenta</i> 8 (series) 30. <i>Supertitán</i> (sitcom) Imagen TV: 0 national titles Canal Once: 0 national titles Canal 22: 0 national titles COPRODUCTIONS – 0 TOTAL PREMIERE NATIONAL TITLES: 30	Foreign premiere titles OBITEL: 4 Televisa: 1 imported title 31. <i>La Biblia</i> (miniserie/USA). TV Azteca: 1 imported title 32. <i>Enfermeras</i> (telenovela/Colombia) Imagen TV: 2 imported titles 33. <i>Verdades Secretas</i> (telenovela/Brasil) 34. <i>Génesis. El origen de todo</i> (series Brasil). Non OBITEL Foreign titles: 5 Imagen TV: 4 imported titles 35. <i>Kuzgun</i> (telenovela /Turkey) 36. <i>Esposa Joven</i> (telenovela/Turkey) 37. <i>Pecado original</i> (Turkey) 38. <i>Madre</i> (Telenovela-Turkey) Canal 22: 1 imported title 39. <i>Iván el Terrible</i> (series/ Russia). Reruns national titles: 10 Televisa 40. <i>Marimar</i> (telenovela) 41. <i>María la del Barrio</i> (telenovela) 42. <i>Lo que la vida me Robó</i> (telenovela) 43. <i>Alborada</i> (telenovela) 44. <i>Silvia Pinal frente a ti</i> (series) 45. <i>Mujer casos de la vida real</i> (unitary). 46. <i>Abismo de Pasión</i> (telenovela) TV Azteca: 1 title 47. <i>Mirada de Mujer, el Regreso</i> (telenovela) Canal Once: 2 titles 48. <i>Soy tu Fan</i> (series) 49. <i>Anne with and E</i> (series) TOTAL OBITEL PREMIERE TITLES: 4
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Source: Obitel México.

In 2022, 30 unpublished national titles were released, which means increased productions compared to 2021, where 16 were made. This increase is also because we include sitcoms in this table. There was an increase in fiction, without counting sitcoms, 20 shows were produced between series and telenovelas. The production in the sitcom format by Televisa stands out. The return of the project *La Fábrica de Sueños* is worth mentioning, with shows such as *Los Ricos También Lloran*.

On Televisión Azteca’s part, the series production stands out, which is a format in which they are investing more, while the production of telenovelas has been on pause since 2016.

**Table 2. National premiere fiction in 2022
and its evolution in the five-year period**

Format	Titles					TOTAL	Hours					TOTAL
	2018	2019	2020	2021	2022		2018	2019	2020	2021	2022	
Telenovela	10	14	5	12	11	52	985:00	750:00	426:00	775:00	695:00	3631:00
Series	14	9	5	1	6	35	455:00	298:50	249:20	50:00	253:00	1305:70
Miniseries	0	0	0	0	0	0	0:00	0:00	0:00	0:00	0:00	0:00
Telefilm	0	0	0	0	0	0	0:00	0:00	0:00	0:00	0:00	0:00
Unitary	4	2	3	3	3	15	367:00	167:00	231:00	324:00	313:00	1402:00
Docudrama	0	0	0	0	0	0	0:00	0:00	0:00	0:00	0:00	0:00
Others	0	0	0	0	10	10	0:00	0:00	0:00	0:00	71:50	71:50 ⁶

Fuente: Obitel Mexico

⁶ In previous years, sitcoms were not counted, so this figure only corresponds to the year 2022.

Table 3. Premiere Fiction broadcast in 2022: countries of origin

Country	Tittles	%	Hours	%
NATIONAL (total)	30	88	1332:50	83
OBITEL COUNTRIES (total)	4	12	281:50	17
Argentina	0	0	0:00	0
Brazil	2	6	202:00	72
Chile	0	0	00:00	0
Colombia	1	3	72:50	26
Ecuador	0	0	0:00	0
Spain	0	0	0:00	0
USA Hispanic	1	3	7:00	2
Mexico	30	0	1332:50	83
Peru	0	0	0:00	0
Portugal	0	0	0:00	0
Uruguay	0	0	0:00	0
Venezuela	0	0	0:00	0
COPRODUCTIONS (Totals)	0	0	0:00	0
National Coproductions	0	0	0:00	0
Obitel Countries Coproductions	0	0	0:00	0
TOTAL	34	100	1614:00	100

Source: Obitel México.

In 2022, the national production stood out with 30 titles, while of countries belonging to Obitel, only five products were released (two from Colombia, one from the United States (Hispanic), and another from Brazil). Imagen TV continues importing products; last year from countries belonging to Obitel, there were two from Brazil, *Verdades Secretas* and *Génesis, the origin of everything*.

Table 4. National and Iberoamerican fiction formats broadcast in 2022

Format	Titles				Hours			
	National	%	Obitel area	%	National	%	Obitel area	%
Telenovela	10	33,3	2	50	695:00	52,1	117:50	42
Serie	6	20	1	25	253:00	19	156:50	55
Miniseries	0	0	1	25	0:00	0	7:50	3
Sitcom	10	33,3	0	0	71:50	5,4	0:00	0
Unitary	4	13,4	0	0	313:00	23,5	0:00	0
Docudrama	0	0	0	0	0:00	0	0:00	0
Others	0	0	0	0	0:00	0	0:00	0
Total	30	100	4	100	1332:50	100	281:50	100

Source: Prepared by OBITEL with national data supplied by Nielsen Ibope México, S.A. de C.V. Software MSS TV, Base “Rating regular 5 domains +Dish. Total television programming during 2022.

Telenovelas and sitcoms are national productions that stand out in several shows. While in terms of production hours, single programs (such as *La Rosa de Guadalupe* and *Como Dice el Dicho*), as well as telenovelas, are the formats with the highest number of episodes and hours made. Telenovelas are the format that continues to be the king in terms of Televisa’s preference for its production and international distribution. As we will see in Table 5, it is the format that ranked first in terms of audience preference.

Table 5. Ten most watched titles in 2022

Title		Channel	Produce by	Format/ genre	Number of episodes in 2022	Time-slot	Rating	Share
1	<i>Los Ricos También Lloran</i>	Las Estrellas	Televisa	Telenovela/ Drama	60	Prime Time	16,67	25,16
2	<i>La Rosa de Guadalupe</i>	Las Estrellas	Televisa	Unitary/ Drama	156	Afternoon	16,27	24,71
3	<i>El último rey. El Hijo del Pueblo (1)</i>	Las Estrellas	Televisa	Bioseries/ Drama	10	Prime Time	15,27	23,35
4	<i>La Madrastra T2</i>	Las Estrellas	Televisa	Telenovela/ Drama	50	Prime Time	14,76	23,53
5	<i>La Herencia</i>	Las Estrellas	Televisa	Telenovela/ Drama	80	Prime Time	14,18	21,90
6	<i>Mi Camino es Amarte</i>	Las Estrellas	Televisa	Telenovela / Drama	83	Prime Time	13,8	21
7	<i>Vencer la Ausencia</i>	Las Estrellas	Televisa	Telenovela/ Drama	80	Prime Time	13,75	21,64
8	<i>Cabo</i>	Las Estrellas	Televisa	Telenovela/ Drama	85	Prime Time	12,82	20,63
9	<i>Amor Dividido</i>	Las Estrellas	Televisa	Telenovela/ Drama	107	Afternoon	12,76	20,76
10	<i>Mujer de Nadie</i>	Las Estrellas	Televisa	Telenovela/ Drama	45	Prime Time	12,53	19,82
Total of national productions: 6				Foreign original scripts: 4				
60%				40%				

Source: Prepared by OBITEL with national data supplied by Nielsen Ibope México, S.A. de C.V. Software MSS TV, Base “Rating regular 5 domains +Dish. Total television programming during 2022”. (*): In the case of *Mi Camino es Amarte* and *Cabo*, its broadcasts began in 2022 and ended in 2023.

Televisa’s fiction productions continue to dominate the Top Ten. It stands out that *Los Ricos también Lloran*, tops the list and is part of the “La Fábrica de Sueños” project. It is also important to point out that *La Rosa de Guadalupe* remains in the audience’s preferences, recovering the top positions—eight of the ten top aired in primetime. The unauthorized bioseries of the singer Vicente Fernández occupy the third place. By 2022, most Mexican scripts stand out, unlike other years where foreigners have prevailed.

Table 6. Profile of the audience of the 10 titles most watched:
gender, age, socio-economic status

Title		Channel	Gender %		Socio-economic status%			
			Women	Men	ABC+	C	D+	DE
1	<i>Los Ricos También Lloran</i>	Las Estrellas	9,82	5,75	10,98	14,82	17,68	26,52
2	<i>La Rosa de Guadalupe</i>	Las Estrellas	9,38	5,49	8,49	14,45	17,63	26,99
3	<i>El Último Rey: el Hijo del Pueblo</i>	Las Estrellas	7,6	5,74	9,25	12,48	17,04	22,18
4	<i>La Madrastra</i>	Las Estrellas	8,54	4,47	8,77	11,33	16,81	22,83
5	<i>La Herencia</i>	Las Estrellas	8,34	4,59	7,98	12,8	15,78	23,23
6	<i>Mi Camino es Amarte</i>	Las Estrellas	8,25	4,6	7,81	11,25	16,08	23,34
7	<i>Vencer la Ausencia</i>	Las Estrellas	8,54	4,29	7,64	12,43	15,3	24,07
8	<i>Cabo</i>	Las Estrellas	7,94	4,79	8,78	10,01	14,58	22,13
9	<i>Amor Dividido</i>	Las Estrellas	7,36	4,2	7,11	11,67	13,6	22,79
10	<i>Mujer de Nadie</i>	Las Estrellas	7,32	4,23	8,11	11,64	13,57	20,53
Titles		Age group %						
		04-12	13-18	19-29	30-44	45+	-	-
1	<i>Los Ricos también Lloran</i>	8,04	7,46	5,64	7,42	10,82	-	-
2	<i>La Rosa de Guadalupe</i>	7,11	6,9	5,92	6,76	10,3	-	-
3	<i>El Último Rey: el Hijo del Pueblo</i>	5,89	6,11	3,77	6,7	9,76	-	-
4	<i>La Madrastra</i>	5,3	5,53	4,74	6,54	9,8	-	-
5	<i>La Herencia</i>	5,95	5,78	5,14	6,26	9,21	-	-
6	<i>Mi Camino es Amarte</i>	6,57	5,56	5,74	5,99	9,2	-	-
7	<i>Vencer la Ausencia</i>	5,61	5,61	5,79	5,95	9,24	-	-
8	<i>Cabo</i>	5,58	5,33	5,11	6,06	9,11	-	-
9	<i>Amor Dividido</i>	5,58	5,66	4,28	6,04	8,08	-	-
10	<i>Mujer de Nadie</i>	4,88	4,87	4,95	5,99	8,61	-	-

Source: Prepared by OBITEL with national data supplied by Nielsen Ibope México, S.A. de C.V. Software MSS TV, Base “Rating regular 5 domains +Dish. Total television programming during 2022”.

It has been established as a pattern that those who consume fiction in Mexico are mainly women over 45 who belong to socioeconomic levels D+ and DE, that is, the lowest SES. In contrast, ABC is the socioeconomic group that consumes telenovelas the least. Among the youngest group, children and adolescents stand out, and those

who watch telenovelas the least are young people between the ages of 19 and 29 who consume other content on other platforms.

3. VoD Monitoring 2022

3.1 VoD Platform market in 2022

In 2022, the growth of Video on Demand services continued, especially the subscription model, although with ups and downs. In Mexico and during the pandemic, the subscription to audiovisual content platforms experienced an acceleration of contracting until reaching an annual increase of 18.2% in 2020. In the first half 2022, this level was reduced to less than half to get 8.4%. However, by the end of 2022, VoD subscription accounting had a growth of 12.6 million, which implies that six out of ten internet users, or 56.2 million Mexicans, have access to audiovisual services and content of the platforms⁷. The streaming market in Mexico diversified and experienced greater competition between platforms such as Netflix, Amazon Prime Video, Disney+, HBO Max Latin America, Apple+, Paramount+, Vix+, Claro-Video, and Starz+, as the most significant, the same competition that has fostered a change in tariff strategy and supply model: a considerable reconfiguration (Piedras, 2022).

For example, the Netflix company, given the continuous loss of subscriptions, and the preference for other competitors such as Disney+ and HBO Max Latin America, has launched a new “basic plan with ads” at a reduced price of \$99 pesos per month (USD 5), and a limited catalog. According to the consultancy *The Competitive Intelligence Unit*, Netflix still maintains its prevalence with 61.1% of total subscriptions -a loss of 2.4 percentage points (pp) compared to the end of 2021. The increase was achieved by Disney+ (12.8% of subscriptions to SVOD), HBO Max (10.3%), and Amazon Prime Video (7.6%), which registered a subscription increase of 0.2, 1 and 0.5 percentage points (pp), respectively. These platforms have used affordable prices that range between \$70 and \$159 pesos per month (\$5 and 7 USD) that can be reduced with promotional rates and subscriptions to cable companies and electronic purchases such as Izzi or Mercado Libre; Likewise, these platforms have invested in original productions of Mexican series and telenovelas such as Disney+, HBO Max, Apple+ and Paramount+. Other platforms are defined by their low participation, such as Claro-Video (2.8% of total subscriptions to SVOD) and Blim TV (1.6%).

Concerning the earnings of companies that offer audiovisual content via subscription, the Mexican internet user spends around USD 48.58 per year for this service⁸, which estimates annual revenues of \$1.9 billion in 2022 and a prospect of 2.32 billion dollars per year by 2026, according to the consulting firm Statista.

⁷ See information at <https://www.theciu.com/publicaciones-2/2022/10/17/mercado-de-contenidos-por-suscripcion-al-2t-2022-crecimiento-y-preferencia-de-plataformas>

⁸ See information at <https://www.elfinanciero.com.mx/empresas/2022/05/18/streaming-deja-en-el-suelo-al-cine-tiene-ingresos-4-veces-mas-grandes/>

3.2. Local VoD platforms supply in 2022 (national, regional within the country)

The offer of VoD platforms in Mexico underwent several changes in 2022. The main difference was the creation of Vix+ (launched on March 31, 2022), a platform that combines Blim TV with Vix and Prende TV as part of the merger of Grupo Televisa with Univision Communications: a transnational conglomerate known as TelevisaUnivision, with headquarters in New York and Mexico City. The Vix+ platform offers two VoD service plans; the first is free with ads; its catalog consists of 40 thousand hours with more than 100 thematic channels. There is another premium plan with paid SVoD (USD 6.99 monthly) without advertising. In this service, ten thousand hours of content are added, additions to the original content consisting of telenovelas, television series, movies, news, and sports (live broadcasts of matches of the men's and women's Mexican Soccer League). Likewise, Vix+ broadcasts exclusively, live, and direct the World Cup by sublicensing the rights, representing a 20% increase in subscription and license revenues. The offer of original titles as a launch as "Vix+ Originals" of the paid plan was the series by *María Félix: La Doña* and *La Mujer del Diablo*. However, in 2022 Blim TV continued to offer 40 live television channels of different genres, only available in Mexico, due to compliance with contracts, licenses, and annual subscriptions entered into before the merger between *Grupo Televisa* and *Univision Communications*.

Claro-Video continues its free offer to subscribers who contract some telephone, cable, and internet service packages from its company. In addition to some original series productions, Claro-Video has added the Paramount+ catalog to its platform at no additional cost and established agreements with Google Play so that its App or application is available on Android TV.

The entry of platforms such as Vix, HBO Max, and Disney Plus led to intense competition in the streaming market, consolidation and exclusivity of content, and more entertainment at home. One of the consequences of the world of on-demand content was the displacement of Cinépolis Klic in 2022 and the announcement of its exit from the Mexican and Latin American market in May 2023, after ten years of its streaming launch and offering films, works theater, sporting events, and national and international concerts. The changes in the strategy and business model of Netflix, Prime Video, and Disney+ with free versions and advertisements made it impossible for the company Organización Ramírez, owner of the major movie exhibition chain, Cinépolis, to compete. The Cinépolis Klic platform offered films purchased for an average of \$300 pesos (USD 15), a higher price than the average for other platforms (Alfaro, 2023).

The offer of Dish México, a satellite TV company owned by MVS Comunicaciones, was modified in 2022. It continues with live series, movies, and special events on-demand programming. However, as of April 13, it withdrew the Fox Sports channels from its programming schedule due to a lack of an agreement with

Grupo Multimedia Lauman, a company that bought shares of Fox Sports Mexico⁹, to continue its broadcast. Instead, the Dish México offer added the sports channels of the NBA, NFL Network, and TVC Deportes, among others.

Likewise, FilminLatino, created in alliance with Filmin Spain, continues offering Mexican and international cinema. In 2022, the company Filmin España turned 15 and premiered its first original documentary film on its platform. FilminLatino continues showing movies released at national film festivals at the cost of USD 4 per month. Plataformacine and Casa Caníbal, which offer independent, festival, and cult cinema, are other platforms that continue with movie rental services without a subscription. Another platform that made its foray into Mexico is Mubi (formerly *The Auteurs*, a social network for moviegoers), a distribution, production, and streaming service company that offers a curated selection of films for a monthly subscription of 7.50 usd per month.

3.3. VoD analysis in 2022: national premiere fiction and co-productions

By 2022 we will see an increase in national premieres on streaming platforms compared to the previous year. In 2021 we point out that Netflix produced eight series, but in 2022 there are other platforms to produce Mexican series. The increase in productions from 2021 to 2022 has been considerable: from 12 to 25 original productions, 15 premieres, and the remaining ten are second or third-season series. That is, double the production or an increase of one hundred percent compared to the previous year. Prime Video has increased its output in Mexico. In 2021 it produced three series, a lower figure than in 2020, but increased with four in 2022. For its part, Vix+ premiered as another option platform with four productions.

⁹ See information at <https://www.elfinanciero.com.mx/empresas/2021/06/08/ift-aprueba-a-grupo-lauman-la-compra-de-fox-sports>

Table 7. National fictions and co-productions displayed in 2022 in VoD systems

NATIONAL PREMIERE TITLES	CO-PRODUCTIONS
Netflix – 12 national titles 1. <i>El Rey</i>, Vicente Fernández (Series) 2. <i>Donde Hubo Fuego</i> (Telenovela) 3. <i>La Flor más Bella</i> (Series) 4. <i>Control Z</i> (Series) 5. <i>Madre Solo Hay Dos</i> (Series) 6. <i>¿Quién mató a Sara?</i> (Serie) 7. <i>Rebelde</i> (Series) 8. <i>Oscuro Deseo</i> (Series) 9. <i>Belascoarán</i> (Series) 10. <i>Dale Gas</i> (Series) 11. <i>Guerra de Vecinos</i> (Series) 12. <i>Club América vs Club América</i> (Mini-Series)	Netflix – 2 titles 1. <i>Élite</i> (5th season, series) – Spain. 2. <i>'Érase una vez... pero ya no'</i> (Serie) – Spain
Amazon Prime – 4 national titles 13. <i>Un Extraño Enemigo</i> (Series) 14. <i>Harina</i> (Series) 15. <i>Mi Tío</i> (Series) 16. <i>Cómo Sobrevivir Soltero</i> (Series)	
Disney Plus – 2 national titles 17. <i>Los Hermanos Salvador</i> (Series) 18. <i>Papás por Encargo</i> (Series)	
HBO Max – 3 national titles 19. <i>Las Bravas</i> (Series) 20. <i>Amsterdam</i> (Series) 21. <i>Los Espookys</i> (Series)	
Claro-Video – 2 national titles 22. <i>Código Implacable</i> (Series) 23. <i>Reputación Dudosa</i> (Series)	
Vix + – 4 national titles 24. <i>Mujeres Asesinas</i> (Series) 25. <i>Travesuras de la Niña Mala</i> (Series) 26. <i>40 y 20</i> 27. <i>María Felix, la Doña</i> (Series)	
Total: 27	Total: 2

Source: Obitel México.

3.4. Narrative features of VoD in 2022

In 2022 several SVoD companies set up their production and marketing offices in Mexico, with the objective, as in Netflix, of increasing original production aimed at both the Mexican and Latin American markets. The increase in productions from 2021 to 2022 has been considerable: from 12 to 25 original productions, 15 premieres, and the remaining ten are second or third-season series.

The series that renewed its second or third season stands out for its drama, suspense, and comedy, for example, *¿Quién Mató a Sara?* or *Oscuro Deseo*, which focus their narrative on crime or the police investigation of murders; or comedy like *Los Espookys* or *Madre Solo Hay Dos*, series that base their comic formula on misunderstandings and the situations that they trigger.

The most watched premiere production on platforms was *Donde Hubo Fuego*, a 39-episode telenovela produced by Argos Televisión for Netflix. This telenovela, of the suspense and crime genre, tells the story of a character who decides to travel to Mexico City and infiltrate a fire department to investigate the death of his journalist brother, who was trying to figure out the identity of a serial killer.

Other premiere series that stand out involve bioseries, a format that is serialized or fragmented into minifications about the life of a famous character or artist. This is the case of *El Rey*, *Vicente Fernández*, which addresses the life and artistic career of Vicente Fernández with a plot related to a success story for establishing himself as an icon of Mexican music. This Netflix production was less successful than *El Último Rey*, *El Hijo Del Pueblo*, another bioseries about the singer's life, produced by TelevisaUnivision and broadcast on open television from March to June 2022. The TelevisaUnivision production was based on a book unauthorized biographical, which addressed scandalous issues such as extramarital affairs and the kidnapping of his son.

The other bioseries was *María Félix, la Doña*, considered one of the best actresses in Mexican cinema and an icon of mass culture. A TelevisaUnivision production and broadcast on Vix+ as part of the twentieth anniversary of the actress' death. The series addresses the life of María Félix, from childhood to her adult life, portraying her figure in the way of female empowerment, ahead of her time, challenging gender stereotypes and the world of men.

Finally, regarding the productions of Disney+ and HBO Max in Mexico, stand-out comedy narratives such as *Papás por Encargo* and *Las Bravas FC* represent these companies' incursion and commitment to compete for the market with novel themes for Mexican audiences. The first series deals with a teenager who lives with her three adoptive parents (a family made up differently). One day, she decides to look for her mother, who mysteriously disappeared many years ago. For its part, *Las Bravas FC* tells the story of a retired soccer player who, forced by his precarious economic situation, trains the women's soccer team of a town in Mexico. In addition to

portraying what happens in sports from the female perspective, the series addresses issues such as insecurity, being overweight, and the relationship with parents from a youthful perspective.

4. Fiction, interactivity and audience participation

For this section, we chose two exemplary cases that account for the different dissemination strategies of the platforms and thematic participation of the audiences: the series *Papás por Encargo* (Disney+) and *María Félix: La Doña* (Vix+), of which we mention a little in the previous section.

4.1 *Papás por encargo*

Papás por Encargo is the second original production of Disney+ in Mexico, and it premiered on July 13, 2022, with ten episodes. BTF Media made it for Disney, a production company founded in Mexico in 2010 but now based in Miami; It maintained a production and distribution agreement with *Disney Media Distribution Latin America* and collaborated in the production of *Hasta que te conocí* (2016), a bioseries about the artist Juan Gabriel, and *El César* (2018), a bioseries about the Mexican boxer Julio Cesar Chavez. *Papás por Encargo* tells the story of California, a teenager who was taken in as a child by three young people who became her adoptive parents since her mother entrusted them to her indefinitely. The story unfolds when the mother contacts the daughter through a gift to look for her in a town outside of Mexico City. So, the three adoptive parents (who make up a pop band) and California set out on a road trip searching for the mysteriously missing mother. With a cast that had previously participated in Disney Channel Latin America productions such as Jorge Blanco (Argentine children's-youth telenovela *Violetta*, 2012-2015), Michael Ronda (Argentine children's-youth telenovela *Soy Luna*, 2016-2018), and the actor and singer Lalo Brito, who was part of La Nueva Banda Timbiriche.

The dissemination and promotion of *Papás por Encargo* had a double strategy. The first was to promote the series as a content innovator on social networks and media, particularly as a series that addresses the topic of integrated families diversely. An updated vision of an ordinary family, where the new generations can notice how homoparental homes and children growing up in diverse dwellings can be as natural as possible compared to other generations. In an interview with the *Milenio* newspaper, actress Fátima Molina, who plays California's mother, commented "This teaches us that there are different families and that we must stop judging, pointing out, we are simply different people; It is time to change optics" (Moreno, 2022).

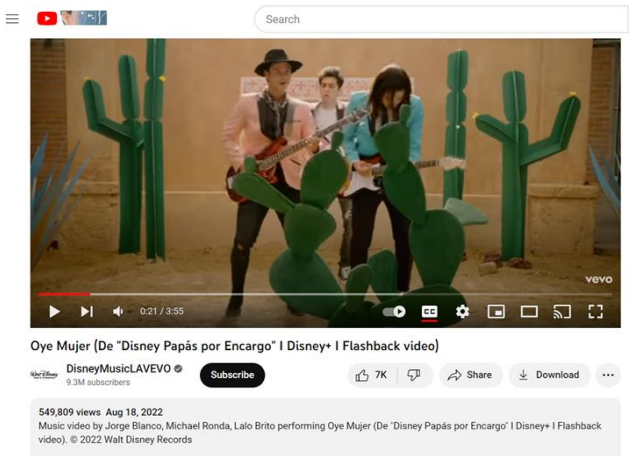
The second promotional strategy was the songs included in each series episode. An approach similar to *Luis Miguel La Serie*, where the soundtrack was integrated into the narrative. The songs are reference points that are not only included in the

narrative as financial-marketing support but also transform the format (González, et al., 2020).



Source: <https://twitter.com/disneyplusla/status/1547974271820898310>

Disney+ posted music videos on platforms like YouTube and Facebook, with thousands of views and user comments. Likewise, the songs were promoted by Spotify on the premiere day. To date (April 2023), the song Oye Mujer is the most popular song on the album on the Spotify platform, with 652.803 views. On YouTube, it has 549.809 views.



Source: https://www.youtube.com/watch?v=1sClT-hwYpY&ab_channel=DisneyMusicLAVEVO

The *Papás por Encargo* audience showed their love for the songs in Twitter, Facebook, and YouTube comments sections.



Source: YouTube México.

However, the issue of California teenagers’ menstruation caused participation in social networks.



Source: <https://twitter.com/PxEUpdates/status/1547776518230720517>

In the comments, the users of these social networks point out the relevance of “breaking the menstruation taboo” and addressing it “openly” in the series. They also emphasized the historical sense of addressing this topic in the context of the production of audiovisual content in Mexico and that it serves the conversation with the family at home.

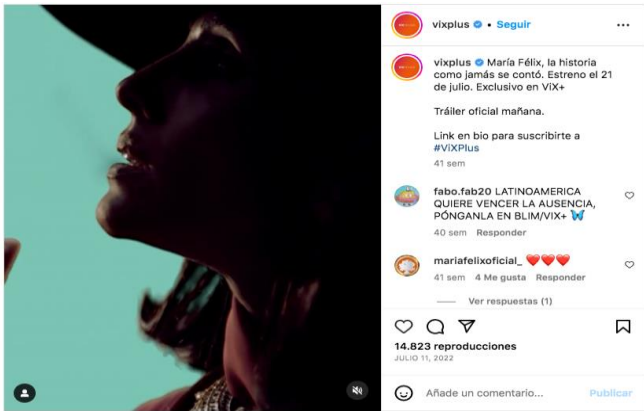


Source: YouTube México.

4.2. *María Félix, La Doña*

This miniseries was launched as one of the original products on which the Vix+ streaming platform became known in July 2022 as part of the TelevisaUnivision merger. The eight-episode series narrates aspects of the life of actress María Félix, from her childhood to her mature age. The story was based on testimonials from people close to the actress and other reports, unlike other bioseries that have been based on unauthorized (or authorized) biographies, which have been great successes, such as that of singer Luis Miguel. *María Félix, La Doña*, stars Sandra Echeverría (mature María Félix); Ximena Romo (as a young man) and Abril Vergara (girl); as well as the actors Guillermo García Cantú, who personifies his father, among other actors. The strategy at Vix+ for this program was not to launch all its episodes in one broadcast but two episodes every week until completing eight.

The producer is Carmen Armendáriz, recognized for her work on television and in the cinema. She is the daughter of Pedro Armendáriz, an actor from the golden age of Mexican cinema. The miniseries' director is Máfer Suárez, who has directed several episodes of the series *Mujeres Asesinas*; An interesting detail is that the production consisted mainly of women. María Félix is considered a woman ahead of her time, who was never weak before men, and coincides with Televisa's recent strategy of broadcasting content based on empowering women. María Félix is a reference for many Mexican women, as an icon for her great physical beauty, but also for not being a submissive woman and always speaking openly and behaving in some way like a man. Even one of the episodes is titled "a woman with a Man's Heart".



Source: https://www.instagram.com/tv/Cf430SSJLAG/?utm_source=ig_web_copy_link

A few days after its premiere, Vix+ released a one-minute trailer through its YouTube channel, with some information about what the series would tell, such as the romances that María Félix had, how she ventured into acting, the bad relationship he had with his father, the crush on his brother who died prematurely, among other details of his life.

TelevisaUnivision promoted the series’ launch through the media, but also using the Vix+ social networks such as Twitter.



Source: https://www.instagram.com/tv/Cf7LRjVr_LY/

When consulting followers’ comments on Vix + on his Twitter account, we found complaints about the advertisements the series contains on the platform, despite being a subscription that requires payment. And it is that Televisa has always handled many promotions in its programming, and as an audience, it is expected that by paying a fee, its consumption can be avoided. When writing this chapter, we checked if there was advertising in the content since they were subscribed, and there wasn’t.

On the other hand, a strategy of TelevisaUnivision is that at the beginning of 2023, it decided to broadcast the series on open television (Canal de las Estrellas), two episodes per week. This may also be to promote the product and reach a larger audience. Referring to this, Parrot Analytics reports indicate that *María Félix, La Doña* has 1.6x the demand for television series in Mexico, and 64% of all programs in this market have this level of demand in the country, that is, is average. The series has not stood out in a nutshell. Another piece of information presented by this company is that the market of origin of the series is one hundred percent Mexican, two percent from the United States, two percent from Spain, and one percent Colombian, Chilean, and Argentine. Therefore, other markets would have to be analyzed to see the penetration of the series with which the Vix+ platform was launched into the world.¹⁰

It is interesting to observe how TelevisaUnivision operates by launching the series on the Vix and Vix+ platforms and later on Canal de las Estrellas. This reveals that all possible platforms are used to obtain benefits from the product, which distinguishes TelevisaUnivision from other platforms, such as Netflix and Claro-Video, which do not have open television channels.

5. Highlights of the year 2022

Among what stands out in 2022, as we mentioned, was the launch of the Vix+ streaming platform owned by TelevisaUnivision. In April 2021, a long merger process began between two large companies, Televisa (owner of the video-on-demand service, Blim TV) and Univision (owner of the Univision Now platform, Prende TV and Vix Latin America), which together will reach more than 100 million Spanish-speaking audiences every day. The merger had the approval of the regulatory authority in the United States, the FCC, and the financial support of Sotfbank and Google. With the launch of Vix+, 60% of viewers are covered in both Mexico and the United States (although it is planned to have access to 19 countries, including the Latin American region) with a broad unified catalog that includes content from other entertainment companies and of sports such as Lionsgate, Metro-Goldwyn-Mayer, TV Globo, The Walt Disney Company, NBC-Universal, among others. As part of this launch, one of the first successful original or Vix+ Original titles in the premium plan was the series *María Félix: La Doña* and *La Mujer del Diablo*¹¹.

On the other hand, it highlights how Televisa and TV Azteca are investing in technology to position themselves better and produce content for different platforms. We have observed that the two television stations have opted to invest in state-of-the-art technology to make their diverse content with higher image and

¹⁰ <https://tv.parrotanalytics.com/MX/maria-felix-la-dona-vix-plus?hl=es>

¹¹ <https://www.forbes.com.mx/negocios-vix-plataforma-que-televisa-univision-competir-netflix/>

sound quality and create products that can be marketed on other platforms, which is why the two television stations are positioned as the two leading television content producers in Mexico.

One of the critical changes in TV Azteca in 2022 is the appointment of a new content director for the television station, Adrián Ortega, who announced that by 2023 the television station would once again produce telenovelas as one of its strategies to boost ratings. This announcement is important, given that since 2016 TV Azteca has stopped making them. This suggests that audiences and income from the production of reality shows have not been as good as expected. As reported in previous years, TV Azteca produced reality shows such as *Exatlón*, *Master Chef*, and *Survivor*. Data from Nielsen Ibope for 2022 shows that it has not been the products of the Ajusto television station that have obtained the biggest audience, but the reality shows produced by Televisa (*Who is the mask*, for example).

Likewise, fiction is therefore, an essential product for television stations but also streaming companies. Netflix Mexico's commitment to melodrama and the telenovela format stands out. *Donde Hubo Fuego* became the first streaming novel, the most viewed not only on Netflix in Mexico but worldwide, even though it did not have an advertising campaign. The production house of this telenovela was Argos Comunicación. This production company brought together accomplished actors of the telenovela that are broadcast on open television, such as Eduardo Capetillo and Itatí Cantoral, to tell a melodramatic story that brings together aspects of romance, passion, crime, and action. However, the pole of attraction, according to Álvaro Cueva, a television critic, had to do with the fact that a story of the fire department of Mexico City is told:

When you see those cases, those emergencies, those fires, your mouth will drop open. Still, when you see them on the largest, busiest, and most emblematic avenues in Mexico, in front of many buildings and monuments that are part of our collective imagination, you will experience an emotion never felt before. You won't believe it because something like this had never been done before, something this good had never been done, and it had never been done with the support and advice of our real-world superheroes: the firefighters of Mexico City (Cueva, 2022).

5.1 Turkish production in Mexico

Another aspect to highlight is the penetration and acceptance of Turkish products in the country. Since its inception, the television station Imagen Televisión has invested in buying successful Turkish telenovelas to broadcast in Mexico. Although the ratings do not reach those of Televisa with its telenovelas, we observe that more and more people watch products from Turkey. It may be, we believe, that the stories that are presented are more similar to the traditional Mexican telenovelas of the eighties, with a central love story, the nuclear family, etc. Mexican stories today

increasingly contain more violence, not only implicit but also explicit. In addition to Turkish products, companies from that country have established themselves in Mexico to produce reality shows, such as *Survivor*, *La Voz Kids*, *La Voz Senior*, and Acun Medya Global for TV Azteca.

6. Topic of the year 2022: Independent production companies in Mexico and the internationalization of television fiction production in Ibero-America

Companies such as Netflix, Disney+, HBO Max, and Vix+ are established as global transmission platforms that structurally modify and alter the logic of production, distribution, exhibition, and consumption in each country (Gómez & Muñoz, 2022; Carboni & Rivero, 2022). In the case of Mexico, the country has emerged in recent years as a center or hub of Mexican and Latin American production (Piñón, 2014) thanks to the presence of these transnational companies of United States origin but also of production companies and agencies -and workers audiovisual sector - from other Latin American countries.

Thus, this section seeks to account for how independent production agencies in Mexico have increased, due in part to their alliances with global platform companies whose strategy of insertion and access to audiences in each country implies the operation and collaboration with production companies of Middle range; an internationalization strategy developed by Netflix in several countries (Lobato & Lotz, 2020). This does not imply that the platform companies continue to co-produce in alliance with national television channels in Mexico, such as Televisa and TV Azteca, or other companies or production companies that have consolidated their work, such as Argos Comunicación and Alazraki Entertainment.

The landscape of audiovisual production in Mexico was dominated for a long time by open television or two private companies, Televisa and TV Azteca, which concentrated the market and audience participation. Local and national public television channels have been marginal in this context, with low production and small audiences. Before the launch of Netflix in Mexico, the national audiovisual production carried out co-productions (mainly series) with pay television channels concentrated in the United States (such as TNT or the Japanese Sony) to compete with open television channels (Gómez, 2016).

Currently, these companies have a series of alliances with open television channels, pay television providers and independent audiovisual production companies. According to the Filming Commission of Mexico City, the report was carried out in alliance with the National Chamber of the Film Industry (CANACINE) and the Mexican Association of Filmmakers AC (ANFI); 2020, 2,422 production houses were registered, of which 199 remain active. The statistical report highlights that

57% (1,805) of the permits granted were to produce series, 13% (401) for TV, 8% (246) for Cinema, and 22% (702) for commercials. This represents an industry's economic income of close to 4.600 million Mexican pesos.¹²

Netflix was the foreign company that began co-productions with Mexican companies in 2015 with the launch of the *Club de Cuervos* series, commissioned to be produced in Spanish with Alazraki Entertainment, producer of publicist Carlos Alazraki and his family. In 2018, Netflix agreed with the independent producer and creator Manolo Caro to broadcast *La Casa de las Flores*. According to Gómez and Rivero (2022), these co-productions and collaborations gradually increased. In 2020 Netflix began an aggressive strategy in the Mexican market by investing 200 million dollars in local production and announcing another 300 million for 2021. A year earlier, Netflix had established its local office in Mexico City, with more than 100 employees, becoming a production center to operate in the Latin American market.

SVOD companies like Disney, Amazon, HBO, and Paramount have also established local offices in Mexico City. According to Gómez and Rivero (2022), there are four production models exhibited by Netflix in Mexico, an aspect that could well be extrapolated to the other platform companies. The first production model corresponds to the content produced by the independent production agency (as in the case of Manolo Caro, creator of *La Casa de las Flores*). The second production model refers to the commissions or commissions of the companies to independent production companies or third parties, where the same corporations finance the projects from the beginning and maintain exclusive transmission rights on their platforms (the case of Alazraki Entertainment). The third model corresponds to co-productions with a prominent broadcaster or television network whose content is broadcast on television nationally, regionally, and globally (the case of *Luis Miguel: La Serie*, a Netflix and Telemundo co-production). Moreover, finally, the fourth model related to the acquisition of successful titles, already released in the country, and collected exclusively for transmission by the platform (the case of *El Chapo*, made by Gaumont International, Univision, and Urgencias, and broadcast by Netflix, or the case of *Hasta que te Conocí, Juan Gabriel*, a series produced by *Somos*, distributed by Disney for TNT and Claro-Video in Mexico).

In this way, with the investment of large companies and the amount of audiovisual content in recent years made by these production centers, the projects and production models have also expanded and hybridized due to the significant incorporation of various independent production companies. This incorporation implies a kind of subcontracting of agencies. On the one hand, the “big players” in audiovisual production can still be identified. For example, in a descriptive review of the amount of production and alliances or partnerships (from 2015 to 2021), Televisa,

¹² See information at: <https://senalnews.com/es/contenidos/como-fue-la-produccion-de-cine-en-mexico-durante-2020>

W Studios, and Blim can be identified with 14 original productions in alliance with Studios Morena Films, Univision, Sony Pictures, Lemon Studios, and ResonantTV; and, secondly, to Sony Pictures with eight productions in collaboration with Claro Video–Imagen Television, TV Azteca, Amazon, and Dopamine.

The independent production companies that have become relevant are Argos Comunicación, Alazraki Entertainment, and Dynamo (an agency of Mexican and Colombian producers). Other independent production companies participate and collaborate with these agencies and the big platform companies such as Anima Studios, BTF Media, 1:11 Films & TV México, Corazón Films, Traziende Film, Resonant TV, Adicta Films, Jaibol Films, Morena Films, Perro Azul, and Dopamine, among those that participate the most in the market.

Argos Comunicación is an independent content production company with years of television production for TV Azteca, cinema, and SVoD. Founded in 1992, it has three owners. The best known is Epigmenio Ibarra, who is a businessman close to the current Mexican government, and who recently confirmed a loan for 150 million pesos (\$ USD 7.5 million) from the Banco Nacional de Comercio Exterior (Bancomext) to invest in the hiring of more employees, purchase of equipment and remodeling of the Churubusco film studios. Argos Comunicación has 52 telenovela productions for TV Azteca, Telemundo, Cadena Tres, Imagen Televisión, and Netflix, as well as 12 series productions for two platforms such as HBO, Netflix, and two television channels such as Telemundo and Cadena Tres.

For its part, the production company Alazraki Entertainment belongs to the Alazraki family. Carlos Alazraki is a television producer known for founding the agency Alazraki y Asociados Publicidad. His son, Gary Alazraki, is a filmmaker, co-creator, and producer of *Club de Cuervos* (2015), the first Netflix original series made on commission. Alazraki Entertainment, in addition to having three film productions, including the commercial success of *Nosotros Los Nobles* (2013), has produced the *Club de Cuervos* saga and its spin-off *La Balada de Hugo Sánchez* (2018) and the unique *Yo, Potro* (2018), both broadcast on Netflix. In 2020, Gary Alazraki produced the comedy series *Acapulco*, starring Eugenio Derbez, for Apple TV+. Moreover, in 2022, he launched a film on the HBO Max platform, *The Father of the Bride*, starring Andy García and Diego Boneta. The services it promotes as an independent producer include production, casting, locations, equipment, post-production, and creativity.

Another independent production company, but due to its presence in the audiovisual industry, is Dynamo Producciones, a Colombian production house with local offices in Mexico City, New York, and Madrid. Dynamo has more than 50 audiovisual productions. However, in Mexico, it stands out for two series produced for Netflix, *Historia de un Crimen: Colosio* (2020), about the murder of the candidate for the presidency of Mexico, Luis Donaldo Colosio, and *Historia de un Crimen: La*

Búsqueda (2020), the case of the disappearance of the girl Paulette Gebara. The two productions are part of the Netflix franchise Crime Story, which resembles the stories that take place in the United States and broadcast on the FX channel (owned by the Walt Disney Company) as *American Crime Story*, creator of the series *The People vs. OJ Simpson* (2016), and *The Assassination of Gianni Versace* (2018).

This brief description of the independent production companies leads us to conclude, on the one hand, how Mexico City has established itself as one of the most critical production centers globally, and on the other, the continuous capital investment of millions of dollars by the SVoD companies that integrate these independent production companies into their business models and commissions for series or fiction with a certain degree of diversity in terms of television formats.

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PORTUGAL

THE NEW BABEL: CO-PRODUCTIONS AS A BLUEPRINT FOR INTERNATIONALIZATION¹

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Introduction

The national audiovisual market has been showing a level of consistency in how the different players act, which is confirmed by the most recent research by the Associação Portuguesa de Produtores de Televisão (APIT, 2023)², even though the public perception has been one of change with the arrival of the *streaming* platforms. The meagre investment which they are required to pledge pursuant to the transposition of the European directive into national law hasn't resulted in any growth of investment in nationally produced fiction, along with an increased difficulty for Portuguese series to mark their presence beyond borders. In light of this, production companies have invested in international co-productions, especially by partnering with traditional free-to-air players, which has resulted in the creation of multilingual works. Unlike the biblical story in which the various languages prevented the construction of a tower that would reach the heavens, cooperating production companies and networks from different nationalities have been undertaking projects that would otherwise never leave the drawing table. This new Babel that the audiovisual field is living in has allowed for peripheral territories such as Portugal to have access to reworked budgets and a content distribution network, which has increased competitiveness for national fiction in the European market and even globally.

¹ The Portuguese team would like to thank CAEM, GfK and Marktest-MediaMonitor for its cooperation in gathering and processing the necessary data.

² APIT. Retrieved on May 18, 2023: <https://www.apitv.com/documentos/>

1. The Audiovisual Context of Portugal in 2022

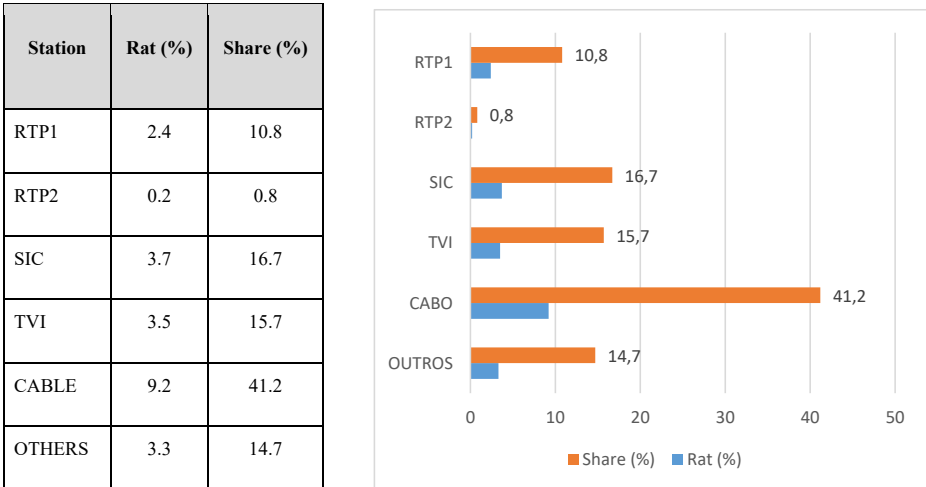
1.1 Broadcast television in Portugal

Table 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)



Source: Obitel Portugal/ Marktest MediaMonitor

In 2022 television consumption saw a decrease, going against the effects of of the pandemic period during the two years prior. As a result, the open signal generalist channels saw their numbers decline. On the other hand, cable consumption rose, which underscores the liveliness for these channels even at a time were audiences gravitate towards alternative forms of consumption such as streaming. These types

of consumptions, considered under “Others”, are continuing to grow, even if at a more slower rate than usual (+0,1% from 2021). The commercial channel SIC, in line with the trend from 2021, remained in the lead by offering an interesting competitive edge that resulted in a more diversified programming.

Chart 2: TV genres and broadcast programming hours - % (Generalist channels)

Genre	Hours	%
Art and Culture	108:34:44	0.3
General interest/Knowledge	2816:51:12	7.3
Sports	1452:03:01	3.8
Other	98:41:28	0.2
Entertainment	8303:54:58	21.6
Fiction	7190:39:14	18.7
News	13066:49:59	34.0
Young audiences	3344:15:29	8.7
Others	02:25:21	0.005
Advertisement	2026:30:24	5.3
TOTAL	38410:45:50	100

Source: Obitel Portugal / Marktest MediaMonitor

News remain the biggest genre on offer by the open signal channels, with a slight increment from the previous year. Russia’s invasion of Ukraine, along with the Sars-CoV-2 pandemic, drove the news coverage with these topics becoming a permanent fixture in the assorted news genres. In this regard, the presence of new types of pundits appearing in news programmes, as well as a heavier emphasis on “aids” such as info graphs and interactive maps. Entertainment is second as usual, offering daily talk shows on the three main channels and live reality and talent shows on weekends. It is also noteworthy to underscore the trend established in the last few years of programming afternoons with live music shows across the country. These programmes fill the weekend afternoons for several hours straight, calling upon popular national artists and the presence of initiatives and services from the assorted locations where the shows occur. Due to their nature, these are low budget programmes that enable channels to occupy several time slots, which, in turn, illustrate how slim the open signal offering is in terms of diversity, as well as the network’s defensive demeanour, especially at a time of financial instability. Fiction ranks third once more with the primetime broadcast of telenovelas on commercial channels and the production and airing of series and miniseries by the public network.

The remaining genres are still minimal, with a noted reduction in sports programming, RTP1 and RTP2 being the main channels airing various sports events.

1.2. Paid TV and VoD Platforms in Portugal 2022

Unlike what was observed in previous years, and according to a television ratings analysis by the Initiative agency (Mediabrand group³), paid TV channels registered the largest ratings growth in 2022. These channels alone secured a 40% share (4,2% more than the previous year). Among them, CMTV maintained its lead (with a 0,4% share increase from 2021), followed by CNN Portugal with 3,1% share, SIC Notícias with 2,3% share (0,3% more than in 2021), Fox with 1,9% share (0,4% more than the previous year) and Hollywood Channel, which held on to its 1,7% share. In terms of number of subscription television subscribers, according to data by the Autoridade Nacional de Comunicações (ANACOM), there was a 3.1% growth from 2021. The study also points out that 61% of subscribers have fibre optics.⁴

Table 2 Pay TV networks in Portugal

10 most watched Pay TV networks in Portugal			
TV Station	Genre	Source	Share (%)
CMTV	Generalist	Portugal	4.8
CNN Portugal	News	USA	3.1
SIC Notícias	News	Portugal	2.3
Fox	Fiction	USA	1.9
Hollywood	Fiction	Spain	1.7
Globo	Generalist	Brazil	1.7
Fox Movies Portugal	Fiction	USA	1.3
TVI Reality	Entertainment	Portugal	1.3
Fox Life	Fiction	USA	1.0
Canal 11	Sports	Portugal	0.9

Source: Obitel Portugal

Table 2 shows the Top 10 for paid television in 2022, with none of them premiering national fiction this year. Comparatively to the Top 10 from 2021, there was a slight change in consumption preferences, with an increase in news and fiction

³ Dinheiro Vivo. Retrieved on May 06, 2023 <https://www.dinheirovivo.pt/geral/sic-lidera-audien-cias-em-2022-pelo-quarto-ano-consecutivo-15593150.html/>
⁴ Anacom. Retrieved on May 6, 2023 <https://www.anacom.pt/render.jsp?categoryId=367576>

channel consumption and a drop in children's channel consumption (none of these figuring in the Top 10 for 2022).

As for VoD platforms in Portugal, according to a study by Statista⁵, Netflix is the most popular platform with nearly 82% of the people surveyed being subscribers. HBO Max (WarnerMedia) is next with 35,6%, Prime Video (Amazon) has 24,5% and Disney+ has 16,9%. Of the main VoD platforms in Portugal, the only one owned by a national public entity is RTP Play (linked to the open signal public television channel RTP). Even though there is no data regarding its relevance in terms of subscription numbers, RTP Play stands out for being the only one without any paid subscription services.

1.3. Sources of financing for the national audiovisual sector

In 2022, the investment in advertisement in audiovisual media kept on growing, however, there was a clear lull, which may be explained by the economic uncertainty caused by the war in Ukraine, along with the sharp rise of inflation rates. This event was particularly evident in the advertisement investment in generalist channels, which had an annual growth of 1% in 2022 vs. 17% growth on cable networks and 12,5% on digital.⁶ Still, according to data by MediaMonitor, television remained as the dominant target for advertisement investment, holding 85,6% of the market, followed by digital media with 7%⁷. This discrepancy is particularly significant when compared to the rest of Europe, where investment in digital advertisement is considerably more dominant.

Product placement and soft sponsoring maintained their robust position as strategies to incorporate advertisement in audiovisual content, with a special emphasis on telenovelas, which continued to integrate in their storyline collaborations with brands. This device is still an important means to monetize the fiction product beyond commercial breaks.

In terms of governmental support and institutional financing, the Instituto do Cinema e do Audiovisual (ICA) issued once more its call for funding of the sector, having €5,510,000 allocated exclusively to various audiovisual projects; which represented an 11% increase from the €4,680,000 in the year prior. Notwithstanding, this organism faced criticism due to their delay in processing the applications which, according to candidates, has compromised project executions⁸.

Along with the funding that is granted through this process, there is also the incentive for productions to invest in Portugal through the Fundo de Apoio ao

⁵ Statista. Retrieved on May 6, 2023 <https://www.statista.com/statistics/1337867/portugal-vid-eo-streaming-service-usage-by-provider/>

⁶ Dinheiro Vivo. Retrieved on May 6, 2023: <https://www.dinheirovivo.pt/opinioao/as-mudancas-no-investimento-publicitario-16171572.html>

⁷ Marktest. Retrieved on May 6, 2023: <https://www.marktest.com/wap/a/n/id~297d.aspx>

⁸ Público. Retrieved on May 6, 2023: <https://www.publico.pt/2023/04/17/culturaipilon/noticia/associacoes-cinema-audiovisual-alertam-atrasos-concursos-ica-2046391>

Turismo e ao Cinema (FACT) which, having €12,000,000 earmarked for 2022 to grant on a first-come basis, by May of 2022 had already spent the entirety of its annual budget. In light of the early closure of this incentive, the fund was attributed an additional 10,9 million Euro in order to support productions that were left out, thus totalling 23 million Euro of funding under this programme for 2022⁹. It should be noted, however, that, according to the assessment report for this incentive, the suspension was considered problematic. On one hand, the long evaluation period and the uncertainty regarding whether or not the applications presented up to May 22, 2022 were accepted or not makes it harder for production companies to fulfil their financial commitments - mainly among Portuguese production companies, which generally have a harder time having access to alternative funding mechanisms. On the other hand, the indefinite suspension of application acceptance affects the established image of Portugal as a reliable destination for cinema production.¹⁰ Even if this funding isn't exclusive for television media, series such as *Operação Maré Negra* (RTP , Ukbar Filmes | Ficção Producciones, Amazon Prime Video) and *Crimes Submersos* (RTP , Coral Europa | Atlantia Media) were supported in a cash rebate scheme.

Finally, programmes such as MEDIA (Creative Europe) and IBERMEDIA kept on supporting the cultural and creative sectors within the European Union and in the Iberian-American space respectively.

1.4. Communication Policies

One of the most relevant aspects in terms of reform in 2022 was the effective enactment of the transposition of the European Directive for audiovisual services in order to update current legislation to the reality of streaming platforms. Therefore, in 2022 the tax for advertisement aired on streaming platforms was applied, with an expected revenue of 4,9 million Euro, to which the annual contribution tax will be added. These amounts are to be considered as ICA's own revenue, which will result in an expected strengthening of the funding that this entity will attribute in 2023. By the end of 2022, a commission was created for the development of a "white book" regarding the public radio and television service. This commission was made up of field specialists and, over a period of five months, should produce an appraisal of the evolution of the audiovisual sector in the last decades, namely with regard to the Portuguese public service and the challenges that it is currently facing¹¹. It was also at the end of the year that the future of the Portugal Film Commission was

⁹ Comunidade de Cultura e Arte. Retrieved on May 6, 2023: <https://comunidadeculturaearte.com/governo-reforca-o-fundo-de-apoio-ao-turismo-e-ao-cinema-em-10-me-e-garante-a-continuidade-da-portugal-film-commission/>

¹⁰ Retrieved on April 7, 2023: https://www.gee.gov.pt/pt/?option=com_fileman&view=file&routed=1&name=Avaliacao_CashRebate.pdf&folder=Destaques&container=fileman-files

¹¹ Retrieved on April 7, 2023: <https://www.portugal.gov.pt/pt/gc23/comunicacao/noticia?i=governo-cria-comissao-do-livro-branco-sobre-o-servico-publico-de-radio-e-de-televisao>

announced, an entity that was created in 2019 with the aim of bolstering and capturing international audiovisual investment towards Portugal, which has been under FACT's management. From 2023 onwards, this entity shall be integrated within ICA's structure, with an expected adjustment in the application procedures based on the results of the assessment of this incentive.

1.5. Digital and mobile connectivity infrastructure

Based on the annual data provided by the Autoridade Nacional para as Comunicações (ANACOM), it is possible to draw a detailed account of the evolution of the impact that digital connectivity has had on television consumption in the last few years. Therefore, if we look at the number of paid television subscribers, the adoption rate is currently close to total, with 96,4% of Portuguese families having this type of service, which represents a 2,7% increase from the previous year. Of these, 60,8% are fibre optic subscribers (FTTH), which saw a 10,4% growth in 2022 from the previous year. On the other hand, every other technologies saw a decrease in subscription numbers, which shows the conversion trend into FTTH beyond a mere acquisition of new subscribers.

Regarding ISPs, MEO held on to the biggest market percentage (41,1% in 2022, which was 0,5% more than the previous year and allowed it to pull away from NOS even further, which lost 0,8% with 37% of television subscribers. Vodafone comes third with 18,8% of subscribers, which represents a 0,6% increase from the previous year¹².

In terms of OTT, the growth trend for paid streaming services subscription remained in 2022, with approximately 42% of internet users subscribing these types of services, or a 7% increase since 2020. Still, the adoption of paid streaming in Portugal is lagging behind the European average which, in 2022, was 47% of internet users. In light of this growth, the ISPs have been increasingly adding SVoD to their existing monthly packages, thus including the main streaming services in a conventional cable offering.

¹² ANACOM. Retrieved on May 6, 2023. https://www.anacom.pt/streaming/TVS2022.pdf?contentId=1739619&field=ATTACHED_FILE

2. Analysis of the Year: National and Iberian-American Premièring Fiction on broadcast television

CHART 1: National and Iberian-American fiction premièring in 2022
(national and foreign under the scope of Obitel and co-productions)

PREMIERING NATIONAL TITLES– 33 RTP1 – 13 <i>1936 – O Ano da morte de Ricardo Reis</i> (series) <i>3 Mulheres: pós-revolução</i> (series) <i>A Rainha e a Bastarda</i> (series) <i>A Traição do Padre Martinho</i> (telefilm) <i>Abandonados</i> (series) <i>Armários Vazios</i> (telefilm) <i>Causa Própria</i> (series) <i>Cuba Libre</i> (series) <i>Da Mood</i> (series) <i>Os Vivos, o Morto e o Peixe Frito</i> (telefilm) <i>Por do Sol</i> (series) <i>Quando o Diabo Reza</i> (telefilm) <i>Vizinhas</i> (telefilm) RTP2 – 1 <i>A Série</i> (series) SIC – 12 <i>A Generala</i> (series) <i>A Serra</i> (series) <i>Amor, Amor Vol.2</i> (telenovela) <i>Esperança</i> (series) <i>Lua Vermelha</i> (telenovela) <i>Lua de Mel – temporada final</i> (telenovela) <i>O Clube</i> (series) <i>Patrões Fora</i> (sitcom) <i>Por Ti</i> (telenovela) <i>Praxx</i> (série) <i>Sangue Oculto</i> (telenovela) <i>Volto já</i> (miniseries) TVI – 7 <i>Festa é Festa II</i> <i>Festa é Festa III</i> <i>Festa é Festa III – Cruzeiro</i> <i>Festa é Festa IV – Verão</i> <i>Festa é Festa V</i> <i>Quero é Viver</i> <i>Rua das Flores</i>	PREMIERE IMPORTED TITLES – 7 SIC – 6 <i>Amor de Mãe</i> (telenovela – Brasil) <i>Amor à Vida</i> (telenovela– Brasil) <i>Bom Sucesso</i> (telenovela – Brazil) <i>Orgulho& Paixão</i> (telenovela – Brazil) <i>Cristal</i> (telenovela– Brazil) TVI – 1 <i>Isabel: a história pessoal da escritora Isabel Allende</i> (série – Chile) TOTAL ORIGINAL OBITEL TITLES: 40
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Source: Obitel Portugal / Marktest MediaMonitor

In 2022, there was a slight decrease in the number of original premièring national titles (from 42 to 39), while still being one of the most prolific years of the past five. The fictional content offering presents itself on assorted formats and genres,

especially due to the work that the public media service has made in supporting diversification and independent productions. During 2022, RTP produced eight (8) series and five (5) telefilms. The latter were part of the project “Contado por Mulheres” in partnership with the production company UKBAR Filmes, which invited ten (10) women in the arts to direct short films for television , based on Portuguese literary works. The telefilms were all taped in Portugal, with local openings and having workshops and master-classes in schools.

The commercial network SIC, which holds the ratings lead for over 50 weeks in a row, apart from airing telenovelas, invested more expressively in interfacing with its own paid streaming platform OPTO by premièring titles first before airing on open signal and making available some of the titles in full. This strategy allowed for the network to offer another type of fiction and, at the same time, use it as a showcase of its premium digital offer. TVI, which is also privately owned, kept its strategy of offering telenovelas during primetime in a single themed planning. Furthermore, the use of the term “season” allowed the network to keep on air “Festa é Festa” since April, 2021, which now totals over 700 episodes and ranks the highest in the Top 10. When it comes to imported titles, there is, on one hand, the broadcasting of Brazilian telenovelas (Globo) on SIC and, on the other, the broadcast of a series originally from Chile by TVI. *Isabel: a história pessoal da escritora Isabel Allende*, was an HBO Max original composed of three chapters and airing on late night between the end of a telenovela and the premièring of a new title.

CHART 2. National fiction titles premièring in 2022 and its evolution over five years

Format	Titles						Hours					
	2018	2019	2020	2021	2022	Total	2018	2019	2020	2021	2022	Total
Telenovela	9	10	6	10	13	48	652:15	878:00	709:10	801:05	824:48	3865:15
Series	9	8	6	10	13	46	100:05	145:00	68:40	144:10	62:30	520:30
Miniseries	1	1	3	3	1	9	02:20:00	02:25:00	08:20:00	12:25:00	01:30:00	27:00
Sitcom	0	0	0	0	0	0	0:00	0:00	0:00	0:00	0:00	0:00
One Shot	0	0	1	6	0	7	0:00	0:00	01:00:00	04:00:00	0:00	05:00:00
Docudrama	0	0	0	0	0	0	0:00	0:00	0:00	0:00	0:00	0:00
Others	0	2	3	13	6	24	0:00	03:30:00	07:10:00	36:15	23:10:00	70:00
Total	19	21	19	42	33	134	754:40	1028:55	794:20	997:55	912:00	4487:45

According to the data, there is an seeming contradiction between public perceptions and facts. Generally speaking, there is an assumption that Portuguese channels rely heavily on telenovelas for their fiction programming, with a scarcity of other format offering and that this has been the case for the past two decades. Looking at five-year periods, one realizes that the series format already rivals the telenovela format and that there are other experiences such as the sitcom and, more expressively, the telefilm. When this reality is looked at per channel, the imbalances seem more apparent, since it has been the public media service the one responsible for this diversity. Due to a reduction of the advertisement pie and the inevitable impact on television investment, private channels are more risk averse when it comes to implementing changes to their programming scheduling and, when it comes to telenovelas, try to stretch their profitability as far as they can.

CHART 3. Fiction premièring in 2022: Countries of Origin

Country	Titles	%	Hours	%
NATIONAL (total)	33	83	911:56:00	72
OBITEL COUNTRIES (total)	7	18	348:16:00	28
Argentina	0	0	0:00:00	0
Brazil	6	15	345:19:00	27
Chile	1	3	02:57:00	1
Colombia	0	0	0:00:00	0
Ecuador	0	0	0:00:00	0
Spain	0	0	0:00:00	0
USA Hispanic	0	0	0:00:00	0
Mexico	0	0	0:00:00	0
Peru	0	0	0:00:00	0
Portugal	33	83	23:56:00	72
Uruguay	0	0	0:00:00	0
Venezuela	0	0	0:00:00	0
CO-PRODUCTIONS (Total)	0	0	0:00:00	0
National Co-productions	0	0	0:00:00	0
Co-productions on Obitel Countries	0	0	0:00:00	0
TOTAL	40	100	1260:12:00	100

Source: Obitel Portugal / Marktest MediaMonitor

As we can see, productions are essentially national in origin. With seven (7) titles coming from the Iberian-American space: six (6) telenovelas (Brasil) and one (1) miniseries from Chile. This fact corroborates the trend for the last decade in terms of consolidating domestic production.

CHART 4. National and Iberian-American fiction formats aired in 2022

Format	Titles				Hours			
	National	%	Rest of Obitel	%	National	%	Rest of Obitel	%
Telenovela	13	39.4	6	85.7	824:48	90.4	345:19	99.2
Series	13	39.4	0	0.0	62:28	6.8	0:00	0.0
Miniseries	1	3.0	1	14.3	01:28:00	0.2	02:57:00	0.8
Telefilm	5	15.2	0	0.0	04:23:00	0.5	0:00	0.0
One-shot	0	0.0	0	0.0	0:00	0.0	0:00	0.0
Docudrama	0	0.0	0	0.0	0:00	0.0	0:00	0.0
Other	1	3.0	0	0.0	18:49:00	2.1	0:00	0.0
Total	33	100.0	7	100.0	911:56	100.0	348:16	100.0

Source: Obitel Portugal / Marktest MediaMonitor

As stated, national production has a much larger presence than Iberian-American production, a trend which started to develop as early as the 2000s. The Brazilian telenovelas by Globo maintain their presence on the private channel SIC, but have been losing visibility by airing later in the programming schedule, sliding out of primetime and into late night. The content coming from other Obitel countries varies in presence and is always residual, with no possible way to identify any trend in particular.

CHART 5: 10 Most watched titles in 2022

Title		TV Station	Producer (Country)	Format/Genre	N° of ch./ep. in 2022	Time Slot	Rating	Share
1	<i>Festa é Festa II</i>	TVI	Plural Entertainment (PT)	Series/Comedy	6	Primetime	11.2	20.9
2	<i>Festa é Festa III Cruzeiro</i>	TVI	Plural Entertainment (PT)	Series/Comedy	11	Primetime	10.7	21.9
3	<i>Festa é Festa III</i>	TVI	Plural Entertainment (PT)	Series/Comedy	123	Primetime	10.4	20.8
4	<i>Festa é Festa IV- Verão</i>	TVI	Plural Entertainment (PT)	Series/Comedy	102	Primetime	9.4	20.6
5	<i>Festa é Festa V</i>	TVI	Plural Entertainment (PT)	Series/Comedy	105	Primetime	9.3	19.7
6	<i>Sangue Oculto</i>	SIC	SP Televisão (PT)	Telenovela/Drama	77	Primetime	8.6	19.2
7	<i>Amor, Amor Vol.2</i>	SIC	SP Televisão (PT)	Telenovela/Drama	112	Primetime	8.5	20.8
8	<i>Quero é Viver</i>	TVI	Plural Entertainment (PT)	Telenovela/Drama	266	Primetime	7.9	19.5
9	<i>A Serra</i>	SIC	SP Televisão (PT)	Telenovela/Drama	84	Night-time	7.7	24.1
10	<i>Por Ti</i>	SIC	SP Televisão (PT)	Telenovela/Comedy	212	Primetime	7.1	18.2
Total National Productions: 10				Foreign Original Scripts: 1				
100%				10%				

Source: Obitel Portugal / Marktest MediaMonitor

Chart 5a: 10 most watched national titles

Title		TV Station	Producer (Country)	Format/Genre	Nº of ch./ep. in 2022	Time Slot	Rating	Share
1	<i>Festa é Festa II</i>	TVI	Plural Entertainment (PT)	Series/Comedy	6	Primetime	11.2	20.9
2	<i>Festa é Festa III Cruzeiro</i>	TVI	Plural Entertainment (PT)	Series/Comedy	11	Primetime	10.7	21.9
3	<i>Festa é Festa III</i>	TVI	Plural Entertainment (PT)	Series/Comedy	123	Primetime	10.4	20.8
4	<i>Festa é Festa IV- Verão</i>	TVI	Plural Entertainment (PT)	Series/Comedy	102	Primetime	9.4	20.6
5	<i>Festa é Festa V</i>	TVI	Plural Entertainment (PT)	Series/Comedy	105	Primetime	9.3	19.7
6	<i>Sangue Oculto</i>	SIC	SP Televisão (PT)	Telenovela/Drama	77	Primetime	8.6	19.2
7	<i>Amor, Amor Vol.2</i>	SIC	SP Televisão (PT)	Telenovela/Drama	112	Primetime	8.5	20.8
8	<i>Quero é Viver</i>	TVI	Plural Entertainment (PT)	Telenovela/Drama	266	Primetime	7.9	19.5
9	<i>A Serra</i>	SIC	SP Televisão (PT)	Telenovela/Drama	84	Night-time	7.7	24.1
10	<i>Por Ti</i>	SIC	SP Televisão (PT)	Telenovela/Comedy	212	Primetime	7.1	18.2
Total National Productions: 10				Foreign Original Scripts: 1				
100%				10%				

Source: Obitel Portugal / Marktest MediaMonitor

In 2022, as was the case in 2021, the titles that made it to the Top 10 are entirely nationally produced, with only one exception (*Quero é Viver*), which had an original script from Chile. Therefore, there is no difference between Tables 5 and 5a.

Going against the trend from previous years, in 2022 TVI was the channel with the biggest amount of spots in the two charts, thus leading the ranking with (6) titles, five (5) of which having been the most watched products by Portuguese audiences in the past year. SIC remains as the only other channel also appearing on the two charts with four (4) fiction products, reverting the trend from previous years, during which it led the top of the most watched national shows.

The hit series/telenovela “Festa é Festa” should be noted, which, during the various chapters aired throughout 2022, consistently managed to hold on to its audience, thus occupying the top spots on Charts 5 and 5a. The trend from the last three years is repeated once more - there are no non-national productions on the Top 10, which, once again, underscores the preference for national productions by Portuguese audiences, even if RTP, the national public network, remains outside this chart.

In 2022, format preferences were split between series (five titles) and telenovelas (five titles) with another split of the same magnitude between comedy and melodrama. The focus on a lighter and more relaxed genre, which was already apparent in 2021, remained throughout 2022.

**CHART 6: Audience profile of the ten most viewed titles:
gender, age, socio-economic status**

Title		TV Station	Genre %		Socio-economic status %			
			Women	Men	AB	C	D	E
1	<i>Festa é Festa II</i>	TVI	59.6	40.4	8.6	15.7	42.5	33.2
2	<i>Festa é Festa III- Cruzeiro</i>	TVI	58.8	41.2	9.8	16.6	39.1	34.5
3	<i>Festa é Festa III</i>	TVI	59.9	41.0	8.8	16.1	39.4	35.6
4	<i>Festa é Festa IV- Verão</i>	TVI	60.9	39.1	9.1	15.4	39.6	35.9
5	<i>Festa é Festa V</i>	TVI	61.3	38.7	11.2	18	38.7	32.1
6	<i>Sangue Oculto</i>	SIC	60.6	39.4	15	17.6	42.2	25.2
7	<i>Amor, Amor Vol.2</i>	SIC	60.2	39.8	12.2	15.7	42.6	29.6
8	<i>Quero é Viver</i>	TVI	64.2	35.8	10	16.4	37.6	35.9
9	<i>A Serra</i>	SIC	61.1	38.9	12.7	16.5	43.1	27.6
10	<i>Por Ti</i>	SIC	60.4	39.6	13	17.4	41.4	28.1

Title		Age %						
		04-14	15-24	25-34	35-44	45-54	55-64	65+
1	<i>Festa é Festa II</i>	5.4	6.9	8	9.1	13.8	18.7	38
2	<i>Festa é Festa III- Cruzeiro</i>	4.7	5.8	6.4	9.3	14.2	21.5	38.1
3	<i>Festa é Festa III</i>	4.3	6.4	7.7	8.7	13.1	20.6	39.1
4	<i>Festa é Festa IV- Verão</i>	4.2	4.4	6.4	8.5	12.6	20.3	43.6
5	<i>Festa é Festa V</i>	3.9	4.7	5.9	8.2	14.2	19.3	43.7
6	<i>Sangue Oculto</i>	3.9	7.3	7.1	10	16.4	22.5	32.9
7	<i>Amor, Amor Vol.2</i>	3.9	5.5	5.3	12.6	14.4	23.9	34.5
8	<i>Quero é Viver</i>	4.6	5.6	7.8	8.9	14.4	21.7	37.1
9	<i>A Serra</i>	2.7	4.4	4.1	12	14	27.7	35.1
10	<i>Por Ti</i>	3.3	6.3	5.8	11.6	14.5	22.8	35.8

Source: Obitel Portugal / Marktest MediaMonitor

In terms of the Audience Profile Analysis, one can conclude that, as in previous years, female audiences consume more telenovelas and series, with the difference between men and women fading when it comes to the various chapters of “Festa é Festa”, this product being more comedic in nature and with a popular appeal that has been well received by male audiences.

Regarding socio-economic bracketing, segments D and E are seemingly those who most watch primetime telenovelas, with no significant difference between the two channels present in the Top 10 . As was the case in 2021, “A Serra” held on to its lead among Portuguese audiences in segments A and B (12,7%).

With respect to age groups, based on Chart 6, one can infer that audiences over 65 are the ones who most consume fiction products. “Festa é Festa” (TVI) and “Sangue Oculto” (SIC) were the productions which managed to captivate a younger audience, on ages 0-14 and 15-24 respectively.

3. VoD Monitoring in 2022

3.1 VoD platform market in 2022

In keeping with the trend from previous years, the new consumption models kept on growing in 2022.

According to a study by Bstream¹³ - *Barómetro de Plataformas de Streaming* by Marktest, the number of Portuguese subscribers of VoD remains to grow: 44,1% of Portuguese audiences uses streaming platforms (a 12% increase from 2021) - with 32,9% of the population over the age of 15 and residing in Continental Portugal being subscribers of at least one such service. However, the same study also indicates that there is less of a predisposition for Portuguese audiences to subscribe to new services, which may result in a subscription decrease over 2023. The Top 5 for platforms remains the same from the previous year, with Netflix in the lead, followed by Disney+, HBO Max, Prime Video and NOS Play.

3.2. Local VoD platform offering in 2022 (national, regional within the country)

Besides the four main VoD platforms present in the previous year - RTP Play, OPTO, TVI Player and NOS Play, there are the following national streaming services in Portugal: FilmIn, Spamflix, Q Play and GinásticaTV.

FilmIn is a paid subscription independent cinema platform whose catalogue is divided into five sections: classics, documentaries, shorts, Portuguese films, kids (content geared towards children). Apart from these, it also showcases sections devoted to the main European and Portuguese cinema festivals (Cannes Festival, Venice Festival, Sundance Film Festival, Motel X and IndieLisboa).

Similarly to FilmIn, SpamFlix is a platform focusing on independent cinema (especially in horror and fantasy genres). It's a subscription free platform working on a pay-per-view basis.

Q Play is a platform associated to Q channel and its offering focuses on national titles with some foreign content. The available genres and formats are fiction content (specifically series), entertainment programmes and talk-shows.

Ginástica TV is a streaming channel with on-demand content, , both off-line and live, instructive, educational and entertainment, focusing on national and international physical activity. It relies on a mixed system of subscriptions and content purchase.

3.3. VoD Analysis in 2022: Premiering national fiction and co-productions

As shown on Chart 6, 2022 saw an increased offer of national titles, totalling ten (10) Portuguese premiering shows, one of them being a co-production with Spain.

¹³ Marktest. Retrieved on May 8, 2023 <https://www.marktest.com/wap/a/n/id~2918.aspx>

CHART 8. National Fiction and Co-productions aired in 2022 on VoD systems

NATIONAL PREMIERING TITLES	CO-PRODCCTIONS
RTP Play – 4 1. <i>iMLOVE – O Hacker do Amor</i> (series) 2). <i>A Mim, Nunca</i> (series) 3) <i>Nem a Gente Janta</i> (series) 4) <i>Rui</i> (series) Opto – 5 1. <i>Vanda</i> (series) 2. <i>Praxx</i> (series) 3. <i>Santiago</i> (series) 4. <i>Volto já</i> (miniseries) 5. <i>O Pai Tirano</i> (miniseries)	Prime Vídeo – 2 1. <i>Operação Maré Negra</i> (series – Spain, Portugal) 2. <i>El Presidente</i> (series – Argentina, Chile, USA) HBO Max – 1 1. <i>Los Espookys</i> (series– Mexico, USA) Netflix – 2 1. <i>Rainha do Sul</i> (series – Spain, México, USA) 2. <i>Corações Marcados</i> (series – Argentina, Colombia, México)
Total: 9	Total: 5

Source: Obitel Portugal / Marktest MediaMonitor

3.4. Narrative characteristics on VoD in 2022

In 2022, the only VoD platforms with national premières were RTP Play and OPTO, both having only aired a total of nine (9) fiction series combined with an exclusive première and airing in their respective platforms.

As per previous years, the series on RTP Play (“iMLOVE, “A Mim, Nunca”, Nem a Gente Janta” and “Rui”) are the result of the RTPLab programme and feature short runtime episodes (between 15 and 25 minutes). According to RTPLab’s curatorial line, these are series aimed at a young audience and tackle themes such as the use of dating apps, abusive love relationships, queerness and the housing crisis affecting young adults. All four series had just one season and, to this date, none of them was greenlit for additional seasons.

The series on OPTO (“Vanda”, “Praxx”, “Santiago”, “Volto Já” and “O Pai Tirano”) were different from those on RTP Play in their episode length (45 to 50 minutes), a larger production investment and due to being targeted towards a broader audience.

“Vanda” is a biographical drama inspired by the story of a woman who robbed a number of banks with a plastic gun. It’s an action thriller with a single season of eight episodes.

“Praxx” was also a series inspired by real events and tells the story of a young woman seeking to uncover the truth about her sister’s death - an alleged accident

on a beach with other university classmates. This series is a young adult drama with two distinct timelines that intertwine on each episode. Its main theme focuses on university hazing practices. It's a serialized drama with its first season composed of six (6) episodes airing during 2021.

"Santiago" is a procedural thriller with a single season of eight episodes of approximately 45 minutes. It tells the tale of a group of pilgrims walking the Santiago Way who become the target of a serial killer.

"Volto Já" is a comedy series that sets itself apart from the rest in OPTO's catalogue in its runtime of approximately six minutes. The series shows the day-to-day of a traditional generational family shop in the city centre and the lives of its employees. The series is episodic with each episode being independent from the rest and with no continuity between them apart from the main story arc for the first season, where the shop is under threat of becoming an AirBnB.

"O Pai Tirano" is composed of three 50 minute episodes constituting a serialized version of its eponymous 1941 film. It's a period comedy about an amateur theatre company and the love affairs, mix-ups and misunderstandings among its players.

Special emphasis should be given to series on OPTO for their diversity of genres, with various options for subscribers to choose from, serving as a national alternative to open signal fiction content.

4. Fiction, Interactivity and Audience Participation

"Pôr-do-Sol", a comedy in a telenovela format produced by the independent producer Coyote Vadio and aired by the public network was one of the most engaging and interactive pieces of content of the year. Even though it did not figure in the Top 10, it garnered buzz among the general consensus, especially with a younger audience, which is typically more critical of telenovelas. The series was planned for a single season of 16 episodes (August 16 to September 3, 2021), but had a second 20 episode season starting on August 8, 2022. The season finale, scheduled for September 8, aired simultaneously on TV and in nine (9) NOS movie theatres across the country (Aveiro, Braga, Coimbra, Lisboa, Loulé, Porto and Viseu). The content was made available on RTP Play (the network's open access streaming platform) and, from June 2 onwards, the first season also became available on Netflix as licensed content. This fact stems from the requirements in the new European directive (quota for independent European productions spoken in Portuguese), along with an investment prerequisite. And, while this doesn't effectively produce anything new in the sector, it serves as a showcase with international visibility, leading to an increase in awareness and audience for local audiovisual fiction.

Besides the interactive presence on social media, which will be discussed below, "Pôr do Sol" was the most searched content ever on RTP Play and the third most

watched programme on the network in 2022. There was intense media coverage of these accomplishments and there was a marked capitalization on the success of the show with derivative activities, which were themselves given ample airtime, such as the participation of the cast and creative crew in ComicCon Portugal 2022, the nomination for best comedy series by SeriesMania (awarded with an honourable mention), the fictional band “Jesus Quisto” taking on a life of its own as well as the production of a spin-off feature film titled “O Milagre do colar de São Cajó”, with an expected première in 2023.

I. Social Participation

Audience participation on-line has been increasing over the years with the most common consumer pattern currently being engagement with the content they follow and of which they are fans. It is also on-line, and particularly on social media, that one can find fully fledged communities interacting with each other, sharing their common interests and concerns about the show and this, through a multi platform type of consumption, perpetuate the fiction’s half life. These subjects are effectively using their digital devices to actively participate not just in the productions themselves, strictly speaking, but with all the content that surrounds them, resignifying the narratives themselves.

An example of this in Portugal was the above mentioned series “Pôr do Sol”. Written by Henrique Cardoso Dias and directed by Manuel Pureza (Coyote Vadio), the RTP series was an undeniable success on television, with large repercussions on social media, especially by a type of audience that typically wasn’t consuming national fiction. The series that made fun of all the telenovela clichés broke out of the television screen, spilling over to social media, especially Twitter, where it garnered a significant amount of followers who would compulsively share bits dubbed “Pérolas de Pôr do Sol”, on every episode.



The comedic tone and the way the show portrayed the trope of the good vs. evil twins separated at birth paved the way for audiences to effortlessly grab these moments and turn them into pop icons by using the most well-known character lines on their social networks and in their everyday lives, sharing memes, hashtags and video snippets that became viral.



Thus, a cult of sorts emerged, with elements that became successful on their own merit which endure to this day, such as the band *Jesus Quisto*, composed of some of the cast in the series. This band actually made its mark on Portuguese music with original songs and, due to a poll created by fans on Twitter on August 17, 2022, eventually released a CD of original songs.



The band scheduled a small national tour which had sold out concerts including two national Coliseums, packed with “quistãos”, the self-named fans of the band.

The image is a vertical collage. At the top left is a Twitter post from @diogoamaral.oficial announcing a concert by Jesus Quisto at Coliseu dos Recreios on April 1st and at Coliseu Porto Ageas on April 20th. The main part of the collage features a large black and white graphic of the five members of Jesus Quisto. To the right of this graphic is a screenshot of a Facebook post from Pedro Sadio showing a live performance of Jesus Quisto, with a woman singing and a man playing guitar. Below the Facebook post is another Twitter post from Miss P (@miss0ppepper) dated May 4th, asking for the name of a fan group and mentioning other users like @tarantelma and @mimarianami. At the bottom of the collage is a photograph of a group of young people, mostly wearing black t-shirts with 'JESUS QUISTO' printed on them, posing for a selfie indoors.

As a veritable transmediatic phenomenon, the band took one of its songs titled “Portugals”, which was launched during the second season, and adapted it into a song to support the Portuguese Football team, now dubbed “Portugal (Let’s Win de Victories)” - in the 2022 Qatar World Cup.

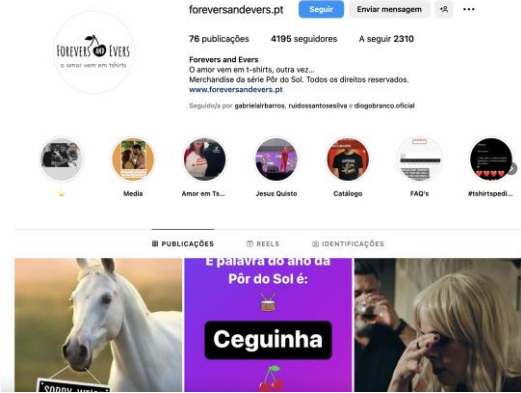
RTP @rtppt · 14 de nov de 2022

Depois do sucesso da série **Pôr do Sol**, os **Jesus Quisto** voltam a surpreender o país. Dia 17 de novembro, quinta-feira, pelas 10h, será lançado um videoclipe da banda com o tema composto para apoiar a Seleção Nacional no Mundial de Futebol.

#jesusquisto #pordosol #mundial #rtp



The theme song for the series itself ended up becoming a staple that was repeated over and over again in the middle of the episodes themselves by the singer Toy as well as by other Portuguese artists. Due to all these elements combined, the series was a major hit on Twitter, where each episode was commented on by the minute, the character’s lines were quoted and shared and the fan group for the project eventually created a merch shop for the series named Forever and Evers.



As stated above, in 2023, the series that won the hearts of Portuguese audiences will return as a feature film and will “continue the saga of the most well-known necklace in Santarém”, São Cajó’s Necklace.

5. Highlight of the Year

In 2022, the highlight goes to the co-production model. Relations with Spain and Galicia in particular have been the most consistent, which can be explained by the geographical, cultural and even linguistic proximity. The Portuguese public network RTP has been investing in this financing and distribution model which has allowed for a significant increase in budget for fiction. This strategy has made national series more competitive in the international market, allowing them to reach a market where they would rarely have access to otherwise, such as the Spanish one, but also to be present in other territories thanks to the interest shown by distributors with the ability to promote national fiction abroad.

The public network’s strategy is in accordance to its legal obligations of investment in national film and audiovisual independent productions, but goes beyond it, which can be construed as a counterpoint to other networks. Private free-to-air stations have maintained a constant programming schedule throughout the years, with a horizontal blocking that prioritizes primetime telenovelas. Throughout the year, SIC has aired four titles - two Portuguese telenovelas and two Brazilian ones, between primetime and late night, while TVI, its direct competitor with which

it disputes the lead on daily ratings, aired three national titles followed by reality shows. Consequently, long running national fiction is still an anchor product for commercial stations, even despite the clear trend of diminishing ratings. As previously stated, RTP defined a strategy that aims to promote genre and format diversity in fiction. This programming philosophy presents itself as an alternative for audiences, which bolsters the importance of a public television service based on different values and, while not oblivious to ratings, isn't exclusively reliant on them nor of the financial results from advertisement slots due to its mixed financial model.

It is also relevant to point out that the public network has had a fundamental role in promoting and developing the audiovisual industry by allowing new creators and producers to have an outlet to present their stories. Along with the exclusively national series, the public network has favoured a system of co-productions with other countries in the European and Latin-American space, with a particular emphasis towards Spain, a natural partner for geographical reasons. This has enabled the sharing of resources and knowledge as well as the expansion of distribution markets.

For the year in question, the series “Crimes Submersos”, “Operação Maré Negra”, “Vanda” (as stated above), “Motel Valkirias” and “O Último Lobo” stood out.

The first title was produced by Coral Europa in conjunction with the Spanish producer Atlantia Media and aired simultaneously on RTP and RTVE, the public networks of each country. This series, which aired in Spain with the title “Sequia”, is a thriller that opens with the discovery of the remains of two people following the drainage of a dam in Spain due to a drought. A Spanish police inspector takes on the case, but will work in close cooperation with the Portuguese police, as the investigation will eventually involve two families living on both sides of the border.

“Operação Maré Negra” is a procedural drama from Ficção Producciones and Ukbar Filmes about the international drug trade. It follows a joint operation between Portuguese and Spanish authorities that apprehend a submarine built by a Brazilian drug cartel that just crossed the Atlantic Ocean. The story is based on actual events and explores an intense narrative of complex characters, social, ethical and moral issues related to organized crime. The series is a co-production by Amazon Prime Video, RTP and several other Spanish regional stations such as Galician Television, Astúrias Television, Basque Country Television and Catalanian Television.

“Motel Valkirias” is a production by SPi and CTV for RTP and TVG in partnership with HBO Max and Onza that was taped in 2022, but aired the following year. It's a thriller that explores the secrets and intrigue surrounding a motel situated at the border between Portugal and Spain, where three female characters very different from each other see themselves involved in the murder of a member of a criminal organization.

Lastly, special mention goes to “O Último Lobo”, a series about the drug dealer Franklin Lobo written by Bruno Gascon in a co-production by Caracol Protagonista

and SPi. The project won the RTVE award at the Conetcat Fiction in Toledo, which resulted in a development deal with the Spanish broadcaster. This project will incorporate screenwriters from both countries and is expected to go into production in 2024.

The collaboration between Iberian producers and broadcasters has paved the way for close relations among Portuguese and Spanish professionals from creative to technical fields, which promotes growth and innovation in the audiovisual industry in both countries, but particularly in Portugal. The co-productions brought a greater diversity and quality to the Portuguese television fiction and opened the doors to exporting content to other international markets. It should also be noted that the coming together of Portugal and Spain has created a multicultural atmosphere promoting Latin identity within the European context.

6. Theme of the Year: Independent production companies and the internationalization of Iberian-American television fiction production

According to article 2 of Act 74/2020 passed on November 19 (revision of Act 55/2012 passed on September 6), «an “Independent Producer” is a collective entity whose main activity consists of producing film or audiovisual works, as long as the following prerequisites are cumulative met: i) No more than 12,5% social capital held, either directly or indirectly, by a television broadcaster or an on-demand audiovisual services broadcaster, or no more than 25% in the case of more than one television broadcaster or on-demand audiovisual services broadcaster; ii) 90% limit on total profits either in the last fiscal year or cumulative over the last three fiscal years made from a single television broadcaster or on-demand audiovisual services broadcaster.» Also according to the same article, an “independent production work” is defined as «any film and audiovisual work produced by an independent producer that cumulatively meets the following prerequisites: i) Ownership by the independent producer of the rights over the produced work with the clear contractual definition of the duration and limits of broadcast rights granted to the television operators, considering that, in case of co-productions between independent producers and other broadcasters, namely television broadcasters, on-demand audiovisual services broadcasters or distributors, the classification as an independent production work is contingent precisely on the ownership of its ownership by the independent producer; ii) Work produced with creative autonomy and freedom in the way it is developed, namely where it concerns the choice of studios, actors, means and distribution, considering that, in case of co-productions between independent producers and other broadcasters, namely television broadcasters, on-demand audiovisual services broadcasters or distributors, decisions pertaining to the production shall be adopted by agreement, with the goal of reaching the technical and artistic quality of the work.»

In terms of funding, as stated above, the majority of independent producers resort to open calls made by the Instituto do Cinema e do Audiovisual (ICA), as well as European funding (MEDIA/Creative Europe programme, Ibermedia). In 2022, ICA awarded a total of 22,9 million Euro (29 calls), with the direct support of the audiovisual sector constituting 22,8% of the total funding. This was 7,8% below what is defined by law (30%), a percentage that has never been reached, which, in itself, illustrates the preferred treatment of cinema over the audiovisual (with a 70% cap). With ICA as its partner, the media public service has played a crucial role in supporting and incentivizing independent producers with the opening of calls for content, the development of productions and co-productions and the internationalization of national audiovisual content.

Another crucial mechanism to making it possible for independent productions to happen is the “Fundo de Apoio ao Turismo, Cinema e Audiovisual” (cash rebate). Between 2018 and 2022, 168 projects (national and international) were supported, in a total investment in Portugal of approximately 238 million Euro, of which 129 millions were foreign investment. According to the government - the Ministry of Culture and Ministry of Tourism - in 2022, 27 million Euro were awarded in funding¹⁴.

Under the principle of a single market and with the aim of adapting the audiovisual sector to the new media landscape, the European Union defined the Audiovisual Media Service Directive (AVMSD) which, at a later date, was and has been the object of transposition into national legislation by the various Member States. Despite having been enacted into law in Portugal on January 1, 2022, this transposition hasn't yet proven itself to be of particular interest to producers: the original projects partnering with international streaming platforms are few, as well as the products that are licensed to fulfil the quota. According to the 2022 Barometer developed by the “Associação de Produtores Independentes de Televisão” (APIT), which represents 40 national producers, including some of the most productive ones in the market, 92% of associates consider that the new law had a neutral impact on activity. Also according to this study, 61% claim that just one (1) client represents more than 25% of their revenue and 40% claim that just one (1) client represents more than 75% of their revenue. When compared to 2021, there was an observable reduction of this dependency by 8%, but this is still a concerning situation, as a markedly diverse and thriving market is still lacking.

Despite this outlook, independent producers have managed to energize the market by being responsible for the significant increase of content in genres and formats other than telenovelas (primetime hegemony by private channels). Furthermore, they have enabled the internationalization of national content, whether through co-productions, direct sales to foreign broadcasters and distributors or by virtue of being nominated for awards at prominent venues.

¹⁴Yearbook for the Audiovisual Production Sector in Portugal 2022. Retrieved on May 10, 2023: <https://www.apitv.com/>

One other current theme associated to independent producers that has sparked public debate has been social and environmental sustainability. Parity and inclusion are yet to become a reality in the real world, and allusions to it on TV screens has been residual and only lightly explored. The preliminary results of a study promoted by MUTIM (“Mulheres Trabalhadoras das Imagens em Movimento”) on the status of women in the film and audiovisual sectors¹⁵ found that, in 2023, women were faced with inequalities in work opportunities, pay gaps and treatment. Regarding environmental issues, 99,8% of independent producers who were surveyed within the scope of the 2022 Barometer identified sustainable production as a concern in the management of their business activity. Even if still at a very early stage, there is an observable general movement towards the inclusion of principles pertaining to efficient resource allocation and circular economy on the various areas of the production process.

Lastly, the ushering of a potential Fourth Industrial Revolution and the debate surrounding the socio-technical context of the use of Artificial Intelligence has taken the sector and the independent producers themselves to take steps towards better understanding the potential of these developments in the field. These are, undoubtedly, themes to follow up on in the next editions.

¹⁵ <https://observador.pt/2023/03/07/estudo-confirma-desigualdades-de-genero-no-cinema-e-audio-visual-em-portugal/>

Resources:

ANACOM: https://www.anacom.pt/streaming/TVS2022.pdf?contentId=1739619&field=ATTACHED_FILE

Associação de Produtores Independentes de Televisão (APIT): <https://www.apitv.com/>

Yearbook for the Audiovisual Production Sector in Portugal 2022: <https://www.apitv.com/documentos/>

Cash Rebate: https://www.gee.gov.pt/pt/?option=com_fileman&view=file&routed=1&name=Avaliacao_CashRebate.pdf&folder=Destaques&container=file-man-files

Comunidade de Cultura e Arte:
<https://comunidadeculturaearte.com/governo-reforca-o-fundo-de-apoio-ao-turismo-e-ao-cinema-em-10-me-e-garante-a-continuidade-da-portugal-film-com-mission/>

Marktest: <https://www.marktest.com/wap/a/n/id~2918.aspx>
<https://www.portugal.gov.pt/pt/gc23/comunicacao/noticia?i=governo-cria-comissao-do-livro-branco-sobre-o-servico-publico-de-radio-e-de-televisao>

Público: <https://www.publico.pt/2023/04/17/culturaipsilon/noticia/associacoes-cinema-audiovisual-alertam-atrasos-concursos-ica-2046391>

Observador: <https://observador.pt/2023/03/07/estudo-confirma-desigualdades-de-genero-no-cinema-e-audiovisual-em-portugal/>

Statista.
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SPAIN: BALANCE OF FORCES IN A SYSTEM THAT INCREASINGLY LEANS TOWARDS STREAMING

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Introduction

Spanish television fiction maintains its high production and quality standards in 2022, as in previous years, although its most notable characteristics demonstrate a system in constant evolution. Thus, the decrease in premieres on generalist channels reflects, once again, the commitment of major private networks (Antena3 and Tele5) to streaming distribution. However, it also reflects the fluctuations in production on the state public television. On the other hand, regional channels reaffirm their stability with one more title than of last year and a similar genre distribution.

Netflix once again leads as the OTT platform with the highest number of premieres, compensating for the moderate decrease in Atresplayer and Amazon Prime Video. The increase in the number of fiction series launching their first season characterizes a programming lineup that, like in previous years, maintains a balance between drama and thriller, while comedy contracts and fantasy expands in stories aimed at the youth target audience. Short-duration series and miniseries further solidify their presence in the offerings of OTT platforms.

1. The audiovisual context of Spain in 2022

Traditional television consumption continues to decline, as does advertising investment. The annual weighted audience index of the three major generalist channels (35.3%, -2.2) also continues its negative trend and decreases to a new historical low. On the other hand, pay television reaches a new record (9.8%, +1.2), while regional channels present their best data since 2013 (8.4%). For the first time in its history, Antena3 is declared the audience leader in Spain.

1.1. Open television in Spain

Once again, traditional television consumption decreases and reaches its historical minimum: 190 minutes per person per day (176 minutes of linear consumption, 7 minutes of time-shifted consumption, and 7 minutes of guest consumption), which represents a reduction of 24 minutes compared to last year (-11%). On the other hand, hybrid TV consumption (internet, streaming, video games, and DTT radio) reaches its historical maximum, registering 36 minutes per viewer per day (+16.7%). This increase brings the total consumption (conventional, traditional pay-TV, and hybrid TV) per person per day to 226 minutes, 18 minutes less than in 2021 (-7.4%). This confirms, once again, that the decline in television consumption is not due to a disaffection towards the medium itself, but rather to a fragmentation of its consumption across multiple screens. In fact, one of the time slots where the decrease in traditional viewing is particularly noticeable is the prime time on weekdays, which coincides with the peak usage time of streaming platforms: 61.4% of users connect at 10:00 PM.¹

Table 1. National open television channels in Spain

Ownership	Public Stations (14)		Private Stations (11)	
	First channel	Second channel	First channel	Second channel
State (national coverage) ²	La1	La2 24H Clan Teledeporte	Antena3, Cuatro, LaSexta, Tele5	Atreseries, BEMADtv, Boing, BOM Cine, Disney Channel, Divinity, DKISS, DMax, Energy, FDF, Gol Play, Mega, Neox, Nova, Paramount Network, Real Madrid HD, Ten, Trece, Verdi Classics
Autonomic (regional coverage)	Á punt, Aragón TV, CanalSur, CMM, ETB1, ETB2, C. Extremadura, IB3, La 7TV, Telemadrid, TPA, TV3, TVCAN, TVG	3/24, And-TV, CSur-And, Esport3, ETB3, ETB4, Galicia TV, IB3 Global, LaOtra, SX3/33, Telemadrid Int, TPA2, TV3CAT, TVG2	8Madrid, 8TV, HitTV, La7, La8, TV Mediterráneo, Rac105	
TOTAL STATIONS = 25 TOTAL CHANNELS = 63				

Source: Obitel España

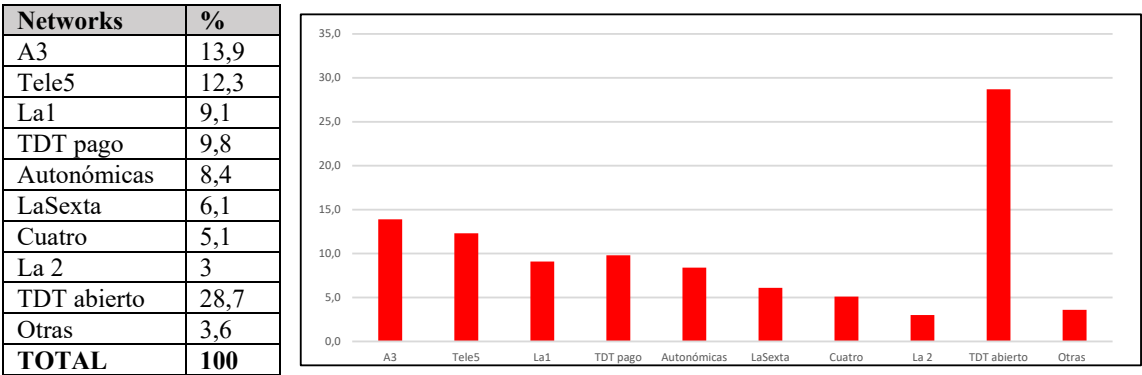
After a decade of Tele5’s leadership, Antena3 is proclaimed as the most-watched network of the year (13.9%, +0.1). Antena3 achieves this historic victory with its highest rating since 2009, leading every day of the week except Sunday, as well as the afternoon (14:00-17:00), evening (17:00-20:30), and prime time (20:30-24:00) time

¹ <https://www.dos30.com/actualidad/category/audiencias-vod/>

²Translator note: In the Spanish case, “state coverage” or “national coverage” refer to networks that reach the whole country, while “autonomic coverage” refers to networks with regional coverage of their own Autonomic Communities. Both autonomic and state networks include public and private ownership.

slots. Tele5, on the other hand, records its lowest annual rating (12.3%, -2.6). The third position once again goes to La1 (9.1%), whose audience grows by 0.3% compared to the previous year thanks to the broadcast of the Qatar World Cup. LaSexta (6.1%, -0.3) surpasses Cuatro (5.1%, -0.2) one more time, with Cuatro reaching a new historical low. La2 continues its positive trend (3%, +0.1) and achieves its best result since 2010. The cumulative rating of the thematic channels (DTT) also reverses its negative trend (28.7%, +1.3) due to significant increases in audience for FDF (2.6%, +0.2), Energy (2.5%, +0.4), and Atreseries (1.7%, +0.3).

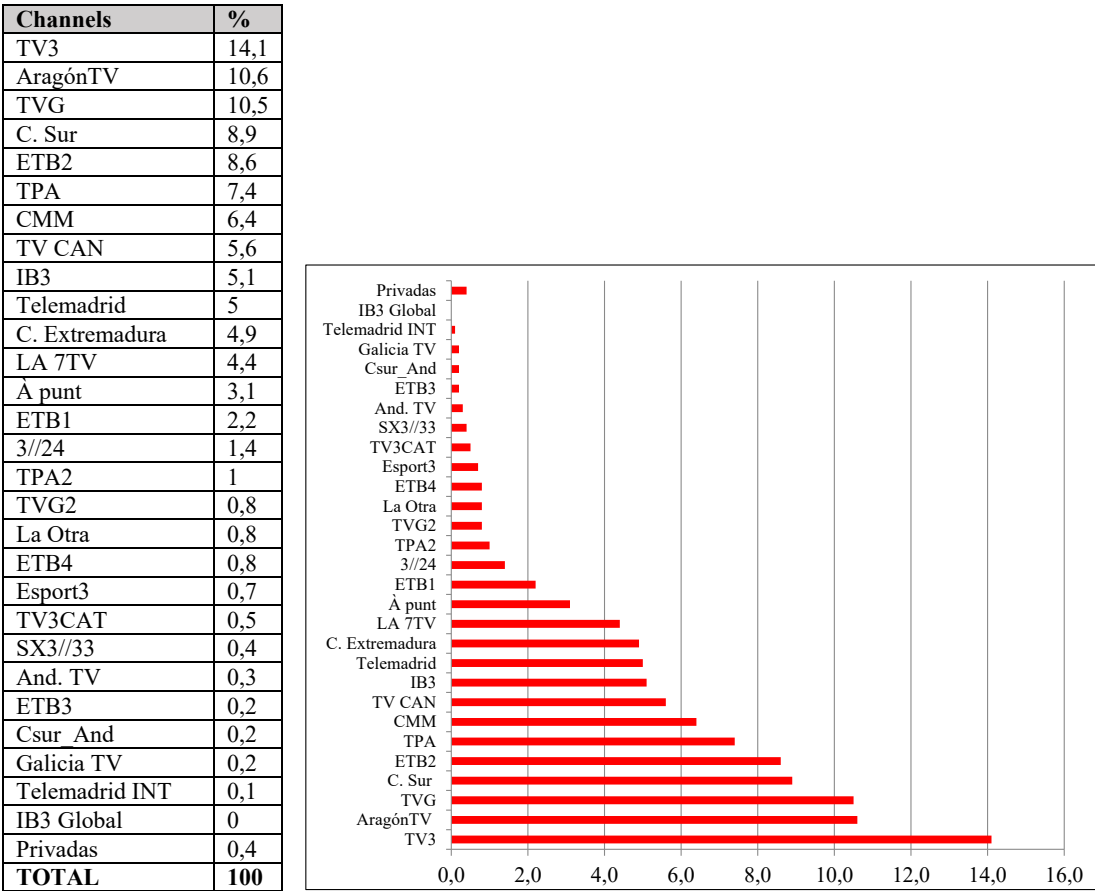
Graph 1. Share by state channels



Source: Barlovento Comunicación/KantarMedia.

The public regional channels repeat the result of the previous year (8.4%), achieving their best rating since 2013. Once again, TV3 (14.1%, +0.1) is the channel with the highest audience share and confirms its leadership in Catalonia for the thirteenth consecutive year. It is followed by AragónTV (10.6%, +0.1) and TVG (10.5%, +0.4). The group of private regional channels grows by one-tenth (0.4%) in 2022.

Graph 1a. Share by regional networks

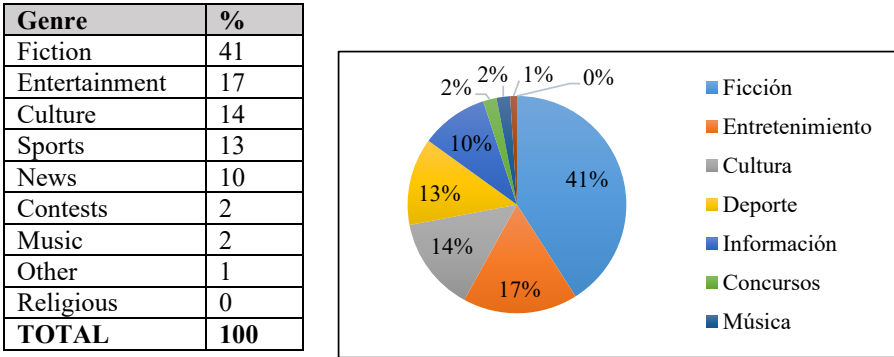


Source: Barlovento Comunicación/KantarMedia.

The leadership by business groups also changes, and this time it belongs to Atresmedia (27.2%, -0.1), followed by Mediaset (26.2%) which loses two points compared to 2021. The audience share of both groups continues to represent more than half of the total (53.4%), although it decreases by 2.2 points compared to last year. RTVE reverses its negative trend and increases by two-tenths (14.7%); while FORTA (Federation of Regional Radio and Television Organizations) gains one-tenth (8.3%). Unidad Editorial also grows (2.7%, +0.1), and Squirell Media maintains the same result (2.6%).

Fiction continues to be the genre with the highest presence across the channels (41%, -0.5), followed by entertainment (17%, -0.3), culture (14%, +0.1), sports (13%, +1.3), and news (10%, -0.4). Furthermore, it is worth noting that in 2022, fiction has gained relevance in the programming of thematic channels: Mega, Gol Play, and BeMad decided to restructure their content, which was previously focused on reality TV and/or sports, to make room for fiction with the aim of consolidating their position.

Graph 2. Genres in TV programming



Source: Barlovento Comunicación/KantarMedia.

Atresmedia, RTVE, and Mediaset restructured their executive leadership teams in 2022. Javier Bardají, who had been in charge of content at Atresmedia for the past 12 years, was appointed as the new CEO, replacing Silvio González, who became the Executive Vice President of the company. Eighteen months after his appointment as president of RTVE, José Manuel Pérez Tornero resigned from his position, and Elena Sánchez became the new interim president. Lastly, Paolo Vasile stepped down as CEO of Mediaset after over two decades, and Alessandro Salem was appointed as his successor.

1.2. Pay TV and VoD platforms in Spain

DTT (Digital Terrestrial Television) continues to be the main system for distributing television content in Spain, but it has decreased by one percentage point compared to the previous year (72%) and sets a new historical low due to the increase in viewing through pay TV (IPTV, cable, or satellite), a system that also achieves a new record (27.7%, +0.7) thanks to the growth of IPTV (18%, +1).

Traditional pay TV channels maintain their positive trend and achieve a new record: 9.8% (+1.2), which is 14% higher than the previous year. This is a television modality that has been continuously gaining viewers since 2013. Among the top ten most-watched pay channels is TNT, which premiered *No Me Gusta Conducir* in 2022, and Comedy Central, which, although it doesn't have its own fiction, airs national productions such as *Camera Café*, *Aída*, or *La que Se Avecina*.

Table 2. Pay television channels in Spain

10 most watched pay TV channels in Spain			
Channel	Genre	Source	% Pay ³
LALIGATV por M+	Soccer	Spain	4.0
Fox	Fiction	USA	3.0
AXN	Fiction	USA	3.0
#VAMOS por M+	Sports	Spain	1.9
TNT	Fiction	USA	2.5
Eurosport	Sports	France	1.9
Calle 13	Fiction	USA	2.1
Canal Hollywood	Film	USA	2.0
Comedy Central	Comedy	USA	1.8
Canal Historia	Documentary	USA	1.3

Source: Barlovento Comunicación/KantarMedia

The most important international VoD platforms in Spain are Netflix, Amazon Prime Video, HBO Max (Warner Bros. Discovery), Disney+, Apple TV, RakutenTV, DAZN, Lionsgate+ (Starz) y Pluto TV (Paramount). SkyShowtime (Comcast and Paramount Global) joined the group in 2002, announcing several national fiction releases for 2023. On the Spanish side, the most relevant platforms are Movistar+ and Movistar+ Lite (Telefónica), Filmin, FlixOlé, RTVE Play, Atresplayer Premium, Mitele Plus and LOVEStv.

1.3. Sources of financing for the audiovisual sector

Advertising investment grew by 4.7% in 2022. However, investment in television, the second area with the highest investment after “Digital”, decreased to 1,731.8 million euros, 3.3% less than the previous year. The advertising investment of the group of national open broadcast televisions decreased by 4.2% (1,519.5 million), which, in turn, decreased its market share by 0.8 points (87.7%). The fall in advertising investment in free-to-air television is mainly due to the fact that the two main media groups, Mediaset and Atresmedia, lost advertising strength: the first reached 710.5 million euros, which translates into a decrease of 7.4% compared to the previous year; while the second placed its advertising billing at 699.1 million, which represents a reduction of 2.6% compared to 2021. Both reached a market share of more than 40% (41% and 40.4% respectively). On the contrary, the investment of the regional television group increased by 4.9% (92.5 million), obtaining a market share

³ Percentage of the channel’s screen share in relation to pay television as a whole.

of 5.3% (+0.4). Pay channels, on the other hand, sharpened their negative trend and decreased by 19.4% (80.3 million), placing their share at 4.6% (-1.0)⁴.

1.4. Communication Policies

The new General Law on Audiovisual Communication (LGCA), finally approved on June 22, maintains the obligation for television stations to contribute to the production and visibility of European content, now also including the large streaming platforms. Thus, companies such as Netflix, Amazon Prime Video or Disney+ will have to dedicate part of the income generated in Spain to financing European audiovisual works (with a quota reserved for films and series in Spanish and another for co-official languages of the State), either producing it, distributing it or contributing money to the Fund for the Protection of Cinematography or the Fund for the promotion of cinematography and audiovisuals in co-official languages other than Spanish.

The new law also affects many other relevant issues such as the protection of minors, with schedules for certain programs, parental controls or the prohibition of using their data for commercial purposes. The financing of RTVE –to which the platforms will now also have to contribute–, the first controls on top YouTubers and parity in the industry –the platforms will have to finance production created or directed exclusively by women– are also relevant developments. Other changes in the new law affect the advertising field since they facilitate saturation -the limit of minutes of advertisements per hour is extended- and allow the channels to modify their programming whenever they wish, giving free rein to counter-programming that was previously prohibited.

1.5. Digital and mobile connectivity infrastructure

In March, the government awarded a subsidy of 76.9 million euros to the RTVE Institute, the corporation's specialized training center in the audiovisual area, to launch a new project: "Proyecto Haz". This project consists of creating a hybrid learning platform, which will combine audiovisual content on the Internet with accompanied, tutored and face-to-face learning, with the aim of providing digital skills training to 40,800 people throughout Spain. The program will also be open to collaboration with other agents in the audiovisual sector, such as regional and local television stations and associations, and even some Spanish and Latin American universities with specialized master's degrees. In addition, it will have the collaboration of institutions from the world of cinema, animation and videogames from all over Spain.

⁴ <https://www.infoadex.es/home/wp-content/uploads/2023/02/Resumen-Estudio-InfoAdex-2023.pdf>

2. Analysis of the year: national and Iberian-American premiere fiction in 2021

Spanish television production shows few changes in a year characterized by continuity, reaffirming, once again, the average quality of its 78 premieres (81 in 2021), 28 of which have been offered on open broadcast channels (10 national and 18 regional) and 50 in the different pay platforms. The free-to-air premieres of Latin American fiction continue to compete with telenovelas of Turkish origin, two of which have already been adapted by Antena3: *Alba* (Fatmangul) and *Madre*.

National private channels continue to prioritize the distributions of their premieres through their respective platforms (Atresplayer Premium, RTVE Play) or their alliances with OTTs (in the case of Tele5 and La1 with Amazon Prime Video). Hence, La1 is, once again, the channel with the greatest number of titles broadcast on free-to-air TV (seven), followed by Antena3 (two) and Tele5 (one).

TABLE 1. Premiere fictions shown in 2022 on state channels (national, foreign in the Obitel scope, and co-productions)

PREMIERE NATIONAL TITLES	PREMIERE FOREIGN TITLES
La 1 – 7 1. <i>Cuéntame Cómo Pasó</i> (series) 2. <i>Los Misterios de Laura</i> (TVmovie) 3. <i>Dos Vidas</i> (serial) 4. <i>Fuerza de Paz</i> (series) 5. <i>Sequía</i> (series) 6. <i>Fuego Cruzado</i> (miniseries) 7. <i>Servir y Proteger</i> (serial) Antena3 – 2 8. <i>Amar Es para Siempre</i> (serial) 9. <i>Alba</i> (series) Tele5 – 1 10. <i>Entrevías</i> (series)	Divinity – 1 1. <i>La Suerte de Loli</i> (telenovela) La 1 – 1 2. <i>Diseñando tu amor</i> (telenovela) Nova – 4 3. <i>La Desalmada</i> (telenovela) 4. <i>Quererlo Todo</i> (telenovela) 5. <i>Rubí</i> (telenovela) 6. <i>Vencer el Desamor</i> (telenovela)
CO-PRODUCTIONS 2	CO-PRODUCTIONS 0
	Total premiere titles OBITEL 16

Source: Obitel España

Regional fiction offers the same number of productions as last year (18), with the Catalan TV3 in the lead for yet another year (six titles) and some novelties, such as the return of Canal Sur to its own fiction production with *Desconocidas*, about a group of women whose lives intertwine in an Andalusian town. Also noteworthy is the increase in Valencian national production at À Punt, with three premieres, and its participation in the TVC production *Després de Tu*, and in the two IB3 productions, *Sicília sense Tu* and *Mòpies* - the latter also co-produced by TVC. TVG and IB3 have three premieres respectively, and ETB1 has two.

TV3 (*Benvinguts a la Família, Vida Privada*) or the comedy *Check in Hotel*, also from Canal9 (2009). TV3 and TVG, the regional channels with the largest domestic fiction, offer their premieres from previous years on their respective “On-Demand” services, as do ETB, Canal Sur or IB3.

**Table 2. Formats of new national fiction in 2022
and their evolution over a five-year period**

Format	Titles						Hours					
	2018	2019	2020	2021	2022	Total	2018	2019	2020	2021	2022	Total
Serial	4	6	5	5	3	23	942:20	997:15	969:00	754:55	480:00	4.143:30
Series	20	16	8	8	5	57	259:45	179:30	61:10	70:35	73:30	644:30
Miniseries	0	1	0	0	1	2	0	3:30	0	0	3:00	6:30
Sitcom	0	0	0	0	0	0	0	0	0	0	0:00	0:00
Tv movie	0	0	0	0	1	1	0	0	0	0	1:30	1:30
Docudrama	1	1	0	0	0	2	252:00:00	14:00	0	0	0:00	266:00
Others	1	0	0	0	0	1	1:10	0	0	0	0:00	1:10
Total	26	24	13	13	10	86	1.455:15	1.194:15	1030:10	825:30	558:00	5.063:10

Total: Obitel España

As can be seen in table 5a, the stability of the regional channels, which continue to offer all their premieres in open broadcast, mitigates the decrease in the number of series in the overall Spanish context, national and regional, (from 35 titles in 2018 to 14 in 2022). The reduction in the number of series is also reflected in the decrease in exhibition hours (409 hours and 15 minutes in 2018 compared to 150 hours and 30 minutes in 2022).

The total offer of serialized programs shows no fluctuations (five titles in 2018 and six in 2022). However, the decrease in the number of hours in the last five years (1,051 hours and 50 minutes in 2018 -the first year of the five-year period- compared to 742 hours and 40 minutes in 2022), reflects the tendency to limit the duration of the programs. TV3 confirms its commitment to *TV movies*, with three premieres dedicated to the remembrance of some historical events of the past: the Civil War (*El Metralla*), the Democratic Transition (*Sis Nits d’Agost*) and the turbulent period that followed October 1, 2017 pretended refered, examined from different points of view (*Alguns Dies d’Ahir*). The three miniseries represent a significant increase in this format compared to the only premiere of this format in 2021.

Table 2a. Formats of new national and regional fiction in 2022 and their evolution over a five-year period

Format	Titles						Hours					
	2018	2019	2020	2021	2022	Total	2018	2019	2020	2021	2022	Total
Serial	5	7	7	6	6	31	1,051:50	1,102:15	1,035:50	860:55	742:40	4,793:30
Series	35	29	20	20	14	118	409:15	314:50	169:00	168:35	150:30	1,212:10
Miniseries	4	2	4	1	2	13	10:00	6:30	12:20	1:40	5:30	36:00
Sitcom	0	0	0	0	0	0	0	0	0	0	0:00	0:00
Tv movie	4	3	0	3	4	14	5:50	4:40	0	4:25	6:30	21:25
Docudrama	1	1	0	0	0	2	252:00	14:00	0	0	0:00	266:00
Others	3	1	0	0	1	5	12:45	9:10	0	0	2:40	24:35
Total	52	43	31	30	27	183	1,741:40	1,451:25	1,217:10	1,035:35	907:50	6,353:40

Source: Obitel España

The number of hours for the 10 titles of national fiction released in 2022 (13 in 2021) amounts to 558 (compared to 825 hours and 30 minutes in 2021), one of which was co-produced with Portugal: the thriller *Sequía*, set on the border and titled *Crimes Submersos* in Portuguese. La1 thus joins the co-productions between the Galician TVG and the Portuguese RTP (such as *Auga Seca*, *Portocabo*, and *Vidago Palace*), in which Amazon Prime Video has also participated with the thriller *Marea Negra* .

The six Latin American telenovelas premiered on the national channels in open broadcast (the same number as in 2021) represent 30% of the time devoted to fiction shown in Iberian-American countries in 2022, equivalent to 239 hours and 10 minutes. As on other occasions, Mexico is the country that contributes the greatest number of titles (five).

Table 3. State fiction premieres in 2022: countries of origin

Country	Titles	%	Hours	%
NATIONAL (overall)	10	63	558:00	70
OBITEL COUNTRIES (total)	6	37	239:10	30
Argentina	0	0	0	0
Brazil	0	0	0	0
Chili	0	0	0	0
Colombia	0	0	0	0
Ecuador	0	0	0	0
Spain	9	56	548:00	70
US Hispanic	1	6	47:15	6
Mexico	5	31	191:10	23
Peru	0	0	0	0
Portugal	0	0	0	0
Uruguay	0	0	0	0
Venezuela	0	0	0	0
CO-PRODUCTIONS (total)	1	6	10:00	1
National Co-productions	1	6	10:00	1
Co-productions Countries Obitel	0	0	0	0
TOTAL	16	100	797:10	100

Source: Obitel España

The 28 premieres that make up national and regional television fiction broadcast in Spain this year (30 in 2021) represent 82% of the Ibero-American total, with a volume of 911 hours and 50 minutes (1,035 hours and 35 minutes in 2021). Fiction from the rest of the Ibero-American countries, broadcast entirely on state channels, represents the remaining 18% in terms of the number of titles and 21% in terms of hours.

**Tabla 3a. State and regional premiere
fiction exhibited in 2022: countries of origin**

Country	Titles	%	Hours	%
NATIONAL (overall)	28	82	911:30	79
OBITEL COUNTRIES (total)	6	18	239:10	twenty-one
Argentina	0	0	0	0
Brazil	0	0	0	0
Chili	0	0	0	0
Colombia	0	0	0	0
Ecuador	0	0	0	0
Spain	27	79	901:30	78
US Hispanic	1	3	47:15	4
Mexico	5	15	191:55	16
Peru	0	0	0	0
Portugal	0	0	0	0
Uruguay	0	0	0	0
Venezuela	0	0	0	0
CO-PRODUCTIONS (total)	1	3	10:00	1
National Co-productions	1	3	10:00	1
Co-productions Countries Obitel	0	0	0	0
TOTAL	34	100	1.150:40	100

Source: Obitel España

As already indicated in relation to table 5, the widespread adoption of the series format by OTTs has led to a drastic reduction this year both in the number of premieres on national channels (five) and in the number of hours (73 hours and 30 minutes). Consequently, the weight of serialized content stands out, accounting for 480 hours equivalent to 83.3% of the Spanish total. The six Latin American telenovelas have aired a total of 239 hours and 10 minutes.

TABLE 4. Formats of national fiction and Obitel exhibited in 2022

Format	Títulos				Horas			
	National	%	Other Obitel	%	National	%	Other Obitel	%
Serial	3	30.0	6	83.3	480:00	86.0	239:10	97.00
Series	5	50.0	0	16.7	73:30	13.2	7:30	3.00
Miniseries	1	10.0	0	0.0	3:00	0.5	0	0.0
TV movie	1	10.0	0	0.0	1:30	0.3	0	0.0
Unitary	0	0.0	0	0.0	0	0.0	0	0.0
Docudrama	0	0.0	0	0.0	0	0.0	0	0.0
Others	0	0.0	0	0.0	0	0.0	0	0.0
Total	10	100.0	6	100.0	558:00	100.0	246:40	100.0

Source: Obitel España

The 14 series aired this year on Spanish channels (national and regional) account for 51.9% of the total, with a runtime of 150 hours and 30 minutes. As for serials, the three titles from the regional channels add to the other three from the state channels and increase the airtime of this format to 742 hours and 40 minutes (81.8% of the total).

TABLE 4a. National and regional fiction formats Obitel exhibited in 2022

Format	Titles				Hours			
	National	%	Other Obitel	%	National	%	Other Obitel	%
Serial	6	21.4	6	83.3	742:40:00	81.8	239:10	97
Series	14	50.0	0	16.7	150:30	16.6	7:30	3
Miniseries	3	10.7	0	0.0	9:10	1.0	0	0.0
TV movie	4	14.3	0	0.0	6:30	0.7	0	0.0
Unitary	0	0.0	0	0.0	0	0.0	0	0.0
Docudrama	0	0.0	0	0.0	0	0.0	0	0.0
Others	1	3.6	0	0.0	2:40	0.3	0	0.0
Total	28	100.0	6	100.0	911:30	100.0	246:40	100.0

Source: Obitel España

The only open-air series in Tele5, the drama *Entrevías*, tops the national ranking with 1,707,000 viewers (15.9%), securing its renewal for 2023. *Alba*, the aforementioned adaptation of the Turkish soap opera *Fatmangul* on Antena3, takes the second position (1,638,000 viewers and 13.6% share). *Los Misterios de Laura*, a special installment of the homonymous police series on La1 in TVmovie format⁶, ranks third. The more than five points that distance it from *Entrevías* have not prevented the network from announcing a two-episode miniseries scheduled for 2023. The long-lived *Cuéntame Cómo Pasó* (airing uninterruptedly since 2001) shows its wear and tear in fourth place in the ranking (1,208,000 and 9.3%).

⁶ *Los Misterios de Laura* has three seasons aired in 2009, 2011 and 2014.

The second open-air premiere on Antena3, the serial *Amar Es para Siempre* (81,168,000 viewers and 12% share), precedes, in fifth position, the new TVE productions, the series *Fuerza de Paz* and *Sequía*, the serials *Dos Vidas* and *Servir y Proteger*, and the miniseries *Fuego Cruzado*, which completes the national top 10 ranking.

TABLA 5: 10 National most viewed titles in 2022

Title		Channel	Producer (Country)	Format/Genre	Chap./ ep. 2022	Time slot	Thousands	Rating	Share
1	<i>Entrevías</i>	Tele5	Alea Media/Mediaset España	Series/Drama	16	Prime time	1,707,000	3.7	15.9
2	<i>Alba</i>	A3	Atresmedia and Boomerang TV	Series/Drama	13	Prime time	1,638,000	3.6	13.6
3	<i>Los Misterios de Laura</i>	La1	RTVE and Veranda TV	TV movie/Cop show	1	Prime time	1,329,000	2.9	10.4
4	<i>Cuéntame cómo Pasó</i>	La1	Grupo Ganga Producc., RTVE	Series/Dramedy	20	Prime time	1,208,000	2.6	9.3
5	<i>Amar Es para Siempre</i>	A3	Diagonal TV	Serial/Drama	253	Afternoon	1,168,000	2.6	12.0
6	<i>Fuerza de Paz</i>	La1	RTVE and Alea Media	Series/Thriller	8	PT & NT	839,000	1.8	8.6
7	<i>Sequía</i>	La1	Atlantia Media, Coral Europa, para TVE and RTP	Serie/Police	8	Prime time	769,000	1.7	6.4
8	<i>Dos Vidas</i>	La1	RTVE and Bambú Producciones	Serial/Drama	26	Afternoon	653,000	1.4	6.6
9	<i>Servir y Proteger</i>	La1	Plano a Plano	Serial/Police	247	Afternoon	602,000	1.3	6.8
10	<i>Fuego Cruzado</i>	La1	BBC, RTVE, Dancing Ledge, Buddand Club, Sur Film	Miniserie/Police	3	PT & NT	593,000	1.3	5.8
Total national productions: 10				Foreign original scripts:0					
100%				0%					

Source: Obitel España

The first place in the regional ranking belongs to a TV Movie from TV3, *El Metralla*, an unusual achievement for this format, attributable to the popularity of its author, Joan Pera, and the interest in the topic addressed: the story of a POUM militiaman (Partit Obrer d’Unificació Marxista), who spends much of the Spanish Civil War hiding in an attic along with a priest. The rest of the Catalan television productions occupy positions two (the series *Cucut*), three (the serial *Com si Fos Ahir*), four (the TV movie *sis Nights d’Agost*) and five (the TV movie *Alguns Dies d’Ahir*), while the sixth contribution from TV3 closes the annual ranking (the sketch *Incidents*). *Desconocidas*, the series that marks Canal Sur’s return to original fiction, ranks sixth (112,000 viewers and 2.4% share), following the aforementioned five Catalan productions, followed by *L’Alqueria Blanca* in its first season as a serial (67,000 viewers and 8.1% share). Finally, it should be noted that although the 2022 ranking exceptionally only includes one TVG series (in ninth position), the share obtained (9.2% and 66,000 viewers) constitutes the sixth highest figure in the overall ranking.

TABLA 5a: 10 Regional most viewed titles in 2022

Title		Channel	Producer (Country)	Format/Genre	Chap./ep. 2022	Time slot	Thousands	Rating	Share
1	<i>El Metralla</i>	TV3	La Drecera Produccions	TV movie/Drama	1	Night time	352,000	4.7	18.3
2	<i>Cucut</i>	TV3	Massa d'Or Produccions, Ja Som Dos Producc., AIE, TVC, Xarxa TV Locals	Miniseries/Drama	5	Afternoon	314,000	4.2	13.6
3	<i>Com si Fos Ahir</i>	TV3	TVC	Serial/Drama	212	Prime time	246,000	3.3	18.3
4	<i>Sis Nits d'Agost</i>	TV3	Institut Català Empreses Culturals, Mallerich Films, Nanouk Films, Paco Poch Cinema, TV3	TV movie/Drama	1	Prime time	192,000	2.6	12.9
5	<i>Alguns Dies d'Ahir</i>	TV3	Grup Focus and TV3	TV movie/Drama	1	Prime time	163,000	2.2	10.0
6	<i>Després de Tu</i>	À Punt, TV3, IB3	Albena Produccions, Minoria Absoluta	Series/Comedy	20	Prime time	126,000	2.7	6.8
7	<i>Desconocidas</i>	Canal Sur	Galdo Media, Lola Cinema, Canal Sur Radio and TV, À Punt	Series/Dramedy	13	Afternoon	112,000	1.4	4.4
8	<i>L'Alqueria Blanca</i>	À Punt	Trivisión, S.L., Zenit TV	Serial/Drama	130	Prime time	67,000	1.5	8.1
9	<i>Saudade de Ti</i>	TVG	Voz Audiovisual	Serial/Drama	60	Night Time	66,000	2.5	9.2
10	<i>Incidents</i>	TV3	TVC, El Terrat (Mediapro Studio)	Sketch/Comedy	4	Night Time	4,4000	0.6	5.6
Total national productions: 10				Foreign original scripts: 0					
100%				0%					

Source: Obitel España

3. VoD monitoring 2022

The number of digital platforms continues to increase, although subscriptions are decreasing. Thrillers and dramas maintain their hegemony, while comedies continue their downward trend. This year, there has been a notable increase in fantasy content aimed at attracting a younger target audience.

3.1. VoD Platform Market in 2022

Competition intensifies this year with the arrival of new players: AMC+, AMC Network’s premium on-demand subscription service, and Enfamilia, a new general linear channel that seeks to bring all members of the household together in front of the television. Established OTTs took advantage of 2022 to attract new consumers. Starzplay, the premium streaming service from Starz, rebranded and became Lionsgate+ to strengthen its identity in the international market. Netflix closed the year by introducing its ad-supported version priced at 5.49 euros, aiming to get ahead

of Disney+ in offering an ad-supported option, which will not be available in Spain until 2023. Free ad-supported platforms have also made their way into Spain and now offer a wide range of content (Plex, Pluto TV, Tivify, Samsung TV Plus, Rlaxx TV, Runtime). On the other hand and going with a different strategy, Apple TV+ increased its monthly rate by 40%, from 4.99 euros, which had been maintained since the service was launched, to 6.99 euros.

According to the results of the 3rd wave of 2022 of the OTT and pay TV market barometer carried out by Barlovento Comunicación, Netflix leads the ranking (56.9%), followed by Amazon Prime Video (50.9%), HBO (26.8%), Disney+ (25.5%) and Movistar+ (18.3%)⁷. The third wave of the General Media Study (EGM) confirms the first two positions (Netflix with 9.6 million homes and Amazon Prime Video with 6.6 million homes), but the third position is shared by Movistar+ and HBO (3.6 million homes respectively), while Disney+ is in fourth place (3.2 million homes)⁸. The fifteenth wave of the OTT Barometer of the Cabinet for Audiovisual Communication Studies (GECA) also confirms Netflix (72.1%) and Amazon Prime Video (68.2%) as leaders. Disney+ appears as the third option (33.5%), relegating HBO (31.4%) and Movistar+ (22.7%) to fourth and fifth position respectively⁹. Finally, the 4th wave of VOD Analytics (SigmaDos30') ratifies the top four positions of the previous study (Netflix, 78.8%; Amazon Prime Video, 76.3%; Disney+, 37.5%, and HBO Max, 37.4%), but closes with RTVE Play (18.1%).¹⁰

3.2. Offer of local VoD platforms in 2022 (national, regional within the country)

Movistar+ appears in the *Top 5* of the Barlovento Comunicación, GECA and EGM reports mentioned above. The OTTs of the rest of the Spanish telecommunication companies have a much more limited market penetration: Euskaltel, Telecable and R have 400,000 subscribed households, according to the EGM.

Atresplayer Premium (6.4), Movistar+ Lite (5.4%), Filmin (4.5%) and Mitele Plus (3.5) respectively occupy the seventh, eighth, tenth and eleventh positions in the GECA OTT Barometer. This same study indicates that *La que Se Avecina* (28.3%) not only maintains first place as the most viewed series of the quarter on platforms, but also achieves its best result in the last four waves.

⁷ <https://barloventocomunicacion.es/barometrotv-ott/barometro-tv-ott-television-de-pago-y-otss-3a-ola-2022/>

⁸ <https://barloventocomunicacion.es/wp-content/uploads/2023/01/Informe-anual-2022-Barlovento-Comunicacion.pdf>

⁹ <https://www.geca.es/geca/informes/20230123--Barómetro%20OTT%20-%20Nuevo%20Informe%20Exclusivo%20GECA.pdf>

¹⁰ <https://www.dos30.com/actualidad/category/audiencias-vod/>

3.3. VoD analysis in 2022: national premiere fiction and co-productions

Spanish fiction on VOD has released 50 titles in 2022, one less than last year, 41 of which debuted their first season (32 in 2021). In this context, the longevity of *La que Se Avecina* stands out, as it aired its 13th season, as well as *Élite*, which achieved a double release with the launch of the fifth and sixth seasons. The remaining productions offered their second and/or third seasons (*Historias para no Dormir*, *El Internado: Las Cumbres*, *Nasdrovia*, *Paraíso*, *La Unidad*, *Desaparecidos*) or their fourth (*Madres*, *Amor y Vida*).

Series continue to be the flagship format, although the trend to reduce the number of episodes is evident in the increase in miniseries (13 in 2022 and four in 2021). The anthology *Historias para no Dormir* returns with four horror films directed by different filmmakers, and this year it is joined by *Historias de Protegidos* (Amazon Prime Video) with five episodes derived from *Los Protegidos: El Regreso*, a sequel to the fantasy drama *Los Protegidos* (Antena3, 2010-2012).

TABLA 9. National fictions and co-productions
exhibited in 2022 on VoD systems.

NATIONAL PREMIERES	CO-PRODUCTIONS
AMAZON PRIME VIDEO – 6 1. <i>Desaparecidos</i> (series) 2. <i>Días Mejores</i> (series) 3. <i>El Internado. Las Cumbres</i> (series) 4. <i>Historias para No Dormir</i> (anthology) 5. <i>La que Se Avecina</i> (series) 6. <i>Un Asunto Privado</i> (series) ATRESPLAYER – 7 7. <i>Heridas</i> (series) 8. <i>Historias de Protegidos</i> (miniseries) 9. <i>La Edad de La Ira</i> (miniseries) 10. <i>La Ruta</i> (series) 11. <i>Señor Dame Paciencia</i> (series) 12. <i>Dos Años and Un Día</i> (series) 13. <i>La Novia Gitana</i> (series) DISENY+ – 1 14. <i>La Última</i> (series) HBO Max – 2 15. <i>¡García!</i> (series) 16. <i>Cómo Mandarlo Todo a La Mierda</i> (miniseries) MOVISTAR+ – 9 17. <i>Apagón</i> (miniseries) 18. <i>El Inmortal</i> 19. <i>Fácil</i> (miniseries) 20. <i>La Unidad</i> 21. <i>Nasdrovia</i> 22. <i>Paraíso</i> 23. <i>Rapa</i> 24. <i>Sentimos Las Molestias</i> 25. <i>Todos Mienten</i> (miniseries) NETFLIX – 16 26. <i>Alma</i> (series) 27. <i>Bienvenidos al Edén</i> (series) 28. <i>Élite</i> (series) 29. <i>Érase Una Vez... Pero Ya No</i> (series) 30. <i>Fanático</i> (miniseries) 31. <i>Feria. La Luz Más Oscura</i> (series) 32. <i>Intimidación</i> (series) 33. <i>La Noche Más Larga</i> (miniseries) 34. <i>Las de La Última Fila</i> (series) 35. <i>Los Herederos de La Tierra</i> (miniseries) 36. <i>Machos Alfa</i> (series) 37. <i>Madres, Amor and Vida</i> (series) 38. <i>Sagrada Familia</i> (miniseries) 39. <i>Si lo Hubiera Sabido</i> (series) 40. <i>Smile</i> (series) 41. <i>Tu No Eres Especial</i> (series) LIONSGATE+ – 1 42. <i>Express</i> (series) PLAYZ – 1 43. <i>Ser o No Ser</i> (series) TNT – 2 44. <i>No Me Gusta Conducir</i> (series) 45. <i>El Gran Sarao</i> (miniseries) APPLE TV 46. <i>Now & Then</i> (miniseries) Total: 46	AMAZON PRIME VIDEO – 2 47. <i>Sin Límites</i> (miniseries – Spain and USA) 48. <i>Operación Marea Negra</i> (series – Spain and Portugal) NETFLIX – 1 49. <i>Santo</i> (series – Spain and Brasil) LIONSGATE+ – 1 50. <i>El Refugio</i> (miniseries – Spain , Mexico, Chile) Total: 50

Source: Obitel España

In 2022, notable highlights include the significant increase in titles from Netflix, with 16 releases compared to 11 in 2021. Movistar+ maintains its stability with the same number of premieres as last year, totaling nine. On the other hand, Amazon Prime Video and Atresmedia experienced a decline, presenting six and seven titles respectively, in contrast to the 11 titles they released in 2021. TNT has two titles, one more than the previous year. A noteworthy addition is Lionsgate+, making its debut with the release of *Express* and the co-production *Refugio*.

As for co-productions, the collaboration between Spain and Portugal on Amazon Prime Video brought us a thrilling series inspired by real events called *Operación Marea Negra* (Amazon Prime Video). In the other three co-productions of 2022, along with Spain, participate the United States (*Sin Límites*), Brazil (*Santo*) and Mexico and Chile (the aforementioned *El Refugio*).

3.4. Narrative features of VoD in 2022

The genre of premieres in 2022 has undergone some significant variations, confirming the changes identified in recent years, while also pointing to new trends. First and foremost, the stability of the thriller genre stands out, with 16 titles in 2022 compared to 15 in 2021. Similarly, the drama genre maintains its consistency with 16 titles in 2022, matching the number from the previous year. However, the comedy genre, which is more reliant on the fluctuations of global television, experiences a decline this year with three fewer titles (10 in 2022). On the other hand, there is an increase in the fantasy genre, with five titles in contrast to just one in 2021. This can be attributed to the growing focus on the youthful target audience, which has been identified in previous seasons as a socially unpredictable group with rapidly evolving interests.

The narrative articulation of each season revolving around the main plot has become a characteristic of Spanish streaming, in line with the international trend of reducing both the number of seasons and the number of chapters/episodes per season and their duration (43 minutes on average in 2022). These strategies reflect an industry on alert, which has already shown clear signs of saturation and is fearful of the loss of Netflix subscribers in 2022, marking the first time in its history.

4. Interactivity and audience participation

The advent of the Internet made possible the interaction and active participation of the audience, while providing multiple spaces to increase the universe of television fiction. Just over a decade ago, social networks became the epicenter of transmedia strategies that continued to enhance classic formats (interactive maps, video games, comics, etc.). However, in recent years, television fictions that seek to extend their narratives beyond the small screen have become increasingly scarce, indicating the end of a trend.

If we look back, the most interesting transmedia proposals in Spain generally came from RTVE, Atresmedia and Movistar. RTVE's Laboratory, for instance, dedicated significant efforts to these types of strategies, including the creation of the video game *Águila Roja*, special episodes of *El Ministerio del Tiempo* with virtual reality elements, and the interactive short film *El Caso. Crónica de Sucesos*. In the case of Atresmedia, social networks served as the foundation for expanding the transmedia universe of its series (*El Barco*, *Paquita Salas* or *Luimelia*). Additionally, the development of microsites dedicated to each fiction has been another successful approach. Examples include "lacripta.com" and "lavalla2045.com", the web spaces of *La Catedral del Mar* and *La Valla*. Movistar, however, was the one who took Spanish transmedia to the next level with the premiere of *La Zona*. Through a gamified experience, the audience could access additional content from the series, as well as a second website ("La otra zona") with curated content that revealed hidden truths related to the plot. After the success of this first premiere, Movistar continued to bet on innovative experiences, such as the 3D recreation of Ava Gardner's house for the *Arde Madrid* microsite; the immersive police intranet of *Gigantes* or the multi-format strategy of *La Peste*.

However, as we have been pointing out for some years now, transmedia content accompanying new television fiction is becoming increasingly limited, nearly reaching insignificance in 2022. This indicates that the fast-moving nature of consumer goods of television fiction (due to the overabundance of the offer in the VoD era) and the prevalence of binge watching have pushed audiences towards a less committed consumption. In response, channels have reduced their investment in transmedia expansion. Among the fictions aired in 2022, only two noteworthy cases are identified, both from Atresmedia: *Historias de Protegidos*, spin-off of *Los Protegidos: El Regreso*, and *La Edad de la Ira*, the series' eponymous podcast.

Under the title *Historias de Protegidos* there are five short stories that bridge the gap between the first and second seasons of *Los Protegidos: El Regreso*, a revival of *Los Protegidos*. *Historias de Protegidos* focuses each of its installments on two main characters from the original series and adopts the narrative strategy of *Elite: Historias Breves*, which expands its narrative universe through short stories released between seasons. In 2021, this series already accompanied its premiere with the launch of a virtual escapism game and a podcast.

On the other hand, *La Edad de la Ira* has amplified its media presence by accompanying its television installments with a weekly podcast of the same name. This format is targeted towards adolescents and features the participation of 12 girls and boys between the ages of 14 and 17 who share their experiences and reflections on essential issues for their generation. The podcast is moderated by Nando López, author of the novel *La Edad de la Ira* from which the television fiction derives, and also has the participation of the protagonists of the series. This television production also

expanded its universe with other resources: an interactive map (El Madrid from ‘La edad de la ira’) with the most notable filming locations and a “false” documentary entitled “Who is Marcos? The documentary”, in which the same characters from the series talk about their relationship with Marcos.

5. Highlights of the year

The 11 state fiction productions released in 2022 reported an average audience of 1,050,600 viewers (9.5% share), approximately 50,000 viewers less than the 13 fictions released the previous year (1,151,752 viewers and 8.9% share). The contraction, which affects both production and consumption, responds to the downward trend experienced in recent years due to the oversaturation of OTT offerings, Tele5 previews on Amazon Prime Video and the launch of almost all Antena3 series on its own payment platform, Atresplayer Premium. Nothing new so far if it were not for TVE’s lack of interest in its own fiction shown throughout 2021 and 2022. Screenwriter Javier Olivares –the creator of successful shows like *El Ministerio del Tiempo*– expresses his dissatisfaction in the following terms: “Pérez Tornero has not made a single effort to promote Spanish fiction. The last thing he has probably watched is *I, Claudius*. There has not been no sensitivity to fiction under his leadership at TVE. This is unprecedented, regardless of who is in charge of the Government¹¹. The article published in *Fotogramas* magazine in December summarizes the year 2022 as an “Annus Horribilis for TVE’s fiction,” criticizing the network’s programming policy.¹²

Nevertheless, the lineup of state television premieres on free-to-air channels presents a diverse range of offerings. Among them, the Spanish-Portuguese co-production *Sequía* stands out, a thriller that begins in a dry swamp bordering both countries and combines the allure of border territories with a nostalgic reflection of the past (the 1990s). The long-standing series *Cuéntame Como Pasó* (La1) aired its penultimate season (number 22) in 2022, relinquishing its position as the most-watched family fiction to the series *Entrevías* (Tele5). This drama about the relationship between a grandfather and his granddaughter mixes some of the clichés of *El Gran Torino* (Eastwood, 2009) –the grumpy old man adapting to a multicultural society– with the sweetening of *Médico de Familia* (Tele5, 1995-1999), paradigm of 1990s comedy in Spain.

The premieres of the regional channels, on the other hand, remain stable (17 titles in 2022 and 18 in 2021) and show a consistency lacking in the offering of the national channels. Valencian television has turned the series *L’Alqueria Blanca* into

¹¹ See https://www.abc.es/play/series/noticias/abci-busca-series-espanolas-prime-time-1-202211062331_noticia.html. As already mentioned in the first section of this chapter, José Manuel Pérez Tornero directed RTVE between April 2021 and September 2022, amid various controversies that ultimately pushed him to resign.

¹² See <https://www.fotogramas.es/series-tv-noticias/a42316596/television-espanola-series-2022/>

a daily serial, set in a rural environment during the late Franco era. It was initially broadcast weekly on the extinct Canal9 (2007-2013) and, later on, on À Punt (2019 and 2021), the network that replaced the latter after it closed in 2013. À Punt has also opted for the rural *thriller* (*Desenterrats*), as has TV3 (*Cucut*, adaptation of the 2019 film *La Vida sense la Sara Amat*), TVG (*A Lei de Santos*) and IB3 (*Sicília sense Morts*). The success of the long-running serial *Com si Fos Ahir* (TV3, 2017-) and the premiere of *Saudade de Ti* on TVG confirm the persistence of this format on FORTA channels, in what is presented as a vindication of the local in the face of the global nature of the big platforms.

In line with the dynamism of international fiction, the quantity and quality of the domestic offerings has led television analysts to question the sustainability of a system threatened by the continuous risk of collapse. Viewing modalities driven by streaming (speed watching, binge watching, etc.), combined with the high number of premieres, point to the mid-term unsustainability of a system that relies on the success of a modest number of fictions compared to the total number of new proposals. For instance, the latest report from Barlovento Comunicación on OTT platform content, released in December 2022, revealed that six out of the 12 most-watched Spanish series during the study period were fictions released as far back as 2003, such as *Aquí No Hay Quien Viva* (Antena3), the second most-viewed series on Amazon Prime Video, or 2005's *Cámara Café* (Tele5), ranking first on Movistar+¹³. The classification is completed by the youth drama *Élite* (Netflix), the comedy *La que Se Avecina* (Amazon Prime Video), released respectively in 2018 and 2007, and the four Movistar+ thrillers *El Apagón*, *La Unidad*, *El Inmortal* and *Todos Mienten*.

Among the critically acclaimed releases in 2022, three adaptations of bestsellers stand out: the thriller *La Novia Gitana*, based on the novel by Carmen Mola; *Los Herederos de la Tierra*, inspired by the sequel to *La Catedral del Mar*, by Idelfonso Falcones¹⁴; and *Fácil*, a comedy about four women with different degrees of disability who live together in an apartment in Barcelona, adapted from the novel by Cristina Morales and directed by the screenwriter for *Arde Madrid* (Movistar+, 2018), Anna R. Costa. The regional TV3 has surprised us this time with four sketches in which as many theater companies perform a comedy recorded with a single 35-minute sequence shot, which turns the scene into television fiction.

6. Theme of the year 2022. Independent production companies and the internationalization of TV fiction production in Iberoamerica

In the 1990s, Spain witnessed the emergence and establishment of a robust television fiction production industry, following TVE's foray into series production in the

¹³ The research was carried out between December 5 and 20, 2022. See <https://barloventocomunicacion.es/barometrotv-ott/contenidos-mas-vistos-en-otss/>

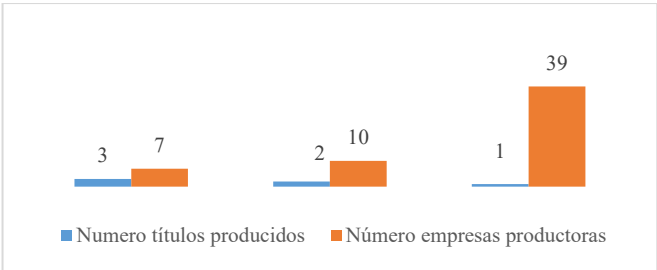
¹⁴ The television adaptation of *La Catedral del Mar* premiered on Netflix in 2018.

1960s and 1970s, as well as the involvement of film production companies in mini-series during the 1980s (Lacalle, 2018). However, despite early successes, the highly competitive nature of the system and the reliance of small companies on different programs aimed at promoting the sector, led to a somewhat oligopoly dotted with numerous short-lived small producers (Álvarez-Monzoncillo; Baraybar -Fernández; López-Villanueva, 2015).

A study by Lacalle and Sánchez revealed in 2019 that more than 60% of independent Spanish production companies had only participated in a single fiction out of the 490 released between 1990 and 2017. In contrast, 10 companies (RTVE, Atresmedia group, Mediaset group, and seven independent production companies) accounted for more than half of these releases. The authors highlighted the contradiction between growing specialization and vertical concentration on the one hand, and atomization on the other, and attributed the excessive fragmentation to the progressive shift from internal and associated external production modalities to external production.¹⁵

Thus, the consolidation of OTTs in the last five years has further reinforced the trends identified in the aforementioned research, with some nuances that give a new character to Spanish production in the global era. On the one hand, the fragmentation characteristic of the sector has increased with 77 premieres in 2022 coming from 56 different companies (graph 3), resulting in an average of 1.4 productions per company. It is also observed that the number of production companies responsible for a single fiction title has increased (69.6% compared to 60% of the research carried out between 1990 and 2017) and that none of the most active companies has participated in more than three productions. Among them, Filmax, a film company, stands out this year for its involvement in the mystery miniseries *Todos Mienten* (Movistar+) and the intrigue and fantasy series *Feria. The Darkest Light* (Netflix).

Graph 3. Number of titles produced by each company in 2022



Source: Obitel Spain

¹⁵ Enrique Bustamante distinguished in 1999 between internal production, associated external production, financed external production, and coproduction with other networks.

Another relevant consequence induced by the expansion of OTTs has been the drastic decrease in internal production, which this year has a single title: The Catalan public television serial *Com Si Fos Ahir* (on air since 2017); an ensemble drama that, in November 2022, celebrated its uninterrupted leadership in TV3's afternoon slot with the airing of its 1,000th episode. The television groups RTVE, Atresmedia and, to a lesser extent, Mediaset España sometimes participate in the production through the associated external modality; but the degree of implication is so variable (even symbolic at times) that the elaboration of *ad hoc* typologies lacks interest precisely because of its futility. So much so, that the latest report from the GECA consulting firm on *Television production in the 2021/22 season* differentiates only between in-house production, delegated production (acquired from Spanish companies) and foreign production (acquired from foreign companies)¹⁶. This simplification is in line with the instability of current business configurations, so for the purposes of this study we consider independent production both delegated production and external production. Therefore, external or independent production includes production associated with or financed by television companies and OTTs and co-productions (Lacalle and Sánchez, 2019).

However, it is also necessary to mention a modality introduced in Spain by the Catalan Mediapro, a production company founded in 1994 and responsible for some of the great successes of Spanish fiction (both television and film). Mediapro launched in March 2019 The Mediapro Studio, a new business structure with the aim of positioning itself as a key player in the global market generating “unique content”. At the time of its launch The Mediapro Studio already had 10 creative offices around the world, 34 ongoing television fictions and a global investment of 200 million euros for fiction, entertainment and documentaries in Spain, Italy, Portugal, Great Britain, Finland, Colombia and Mexico. The uniqueness of The Mediapro Studio lies in its ability to cover “the entire value chain, from development, creation, production, provision of audiovisual services, artistic direction and distribution”, as stated by managing partner Jaume Roures on the occasion of its launch¹⁷. The Studio shares productions with major OTTs, the Spanish state networks and the Brazilian Globo Internacional, while Mediapro appears as the Spanish production company with the most activity in the 2021/22 season. The fictions promoted from The Mediapro Studios in 2022 have been *Incidents* (El Terrat), *Dos Años y Un Día* (Estela Films, Globomedia, Lacoproductora, Pólvora Films), *El Internado. Las Cumbres* (Globomedia) and *Express* (The Mediapro Studio).

¹⁶ See <https://www.geca.es/geca/informes/20220807--Informe%20Produccion%20Temporada%20202122.pdf>

¹⁷ See <https://www.elmundo.es/television/2019/03/19/5c91413b21efa08b168b45e4.html>

6.1. Business movements among production companies in 2022

In recent years, profound changes in the Spanish audiovisual landscape have turned competitors into business partners. This trend continues in 2022, the year in which fiction producers have continued to join forces to boost the industry. For example, Buendía Estudios, created by Atresmedia and Telefónica in 2020, has signed an agreement with Universal International Studios, a division of Universal Studio Group, to co-develop and produce original fiction, as well as to adapt NBCUniversal formats for the entire Spanish-language market. The Spanish adaptation of the Australian fiction *Safe Harbour*, winner of the international Emmy, will be the first project to be launched as a result of this agreement.

Secuoya Studios and Caracol TV have also signed an agreement in the international arena to jointly develop, produce and finance premium fiction projects in Spanish. Secuoya Studios and Caracol TV will be joint owners, with a 50% stake each, of the intellectual property of all the audiovisual works made within the framework of this agreement, they will retain the distribution rights in their own territories and will negotiate the possible international windows.

In parallel, PRISA Media has reinforced its video area with the incorporation of Lacoproductora (known for *Por H or B* and *Riders*), with whom they had been collaborating externally, as a unit for format creation, marketing and production of audiovisual projects. Banijay Iberia, formed in 2020 after the merger of Banijay and Endemol Shine, and encompassing eight of the most successful production companies operating in Spain and Portugal (Cuarzo Producciones, Diagonal TV, Endemol Portugal, Gestmusic, Magnolia, Shine Iberia, Tuiwok Estudios and Zeppelin), incorporated a new member: Pokeepsie Films, the independent production company by Álex de la Iglesia and Carolina Bang, responsible for *30 Monedas*.

Finally, the Squirrel Media group closed 2022 with the acquisition of the Grupo Ganga production conglomerate, responsible for *Cuéntame Cómo Pasó* or *HIT*. It is worth noting that Squirrel Media had previously strengthened its position by acquiring Veralia Distribución de Cine and 75% of the shares of NET TV in January of the same year, thus becoming the third national private free-to-air television operator in Spain, behind only Mediaset and AtresMedia.

All these alliances and mergers between independent production companies strengthen the sector and consolidate the privileged position of the Spanish audiovisual industry. For example, after the merger of Warner and Discovery, budget cuts and strict cost-cutting measures continued to affect HBO Max, which has dismantled the production of originals in Nordic countries, Central Europe, the Netherlands and Turkey. Spanish production, however, has been maintained due to its good performance in Latin American markets and in the United States of America.

6.2. Internationalization of fiction production

Spanish fiction production has also been characterized by the interest it generates outside its borders. The Series Atresmedia label continues to captivate audiences worldwide and solidified its position as the group with the highest investment in Spanish fiction. In 2022, for example, it reached an agreement with the distributor Jung Consulting for the broadcast, in South Korea, of *El Tiempo Entre Costuras*, a critically acclaimed and popular series produced in collaboration with Boomerang TV. Additionally, *UPA Next*, the sequel to *Un Paso Adelante* also produced by Globomedia, can be seen in France thanks to the agreement reached with Groupe M6, one of the main French TV operators. In 2004, Groupe M6 already aired *Un Paso Adelante*, one of the pioneering Spanish series in internationalization that achieved a great success, reaching over 60 countries. Among the public television titles, the case of *La Otra Mirada* stands out, a fiction produced by Boomerang TV for RTVE, which has been aired since 2022 in the United States of America and Canada through Public Broadcasting Service (PBS).

Regarding the acquisition of formats for adaptation in 2022, *Il Patriarca*, the Italian version of *Vivir Sin Permiso*, a Mediaset España production in collaboration with Alea Media, has had its rights sold to Camfilm production company, for broadcast on Canale 5. Another notable adaptation from 2022 is *La Casa de Papel: Corea* (Netflix), an adaptation of the successful fiction created by Álex Pina.

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URUGUAY: THREE DIMENSIONS OF TELEVISION INTERNATIONALIZATION

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Introduction

Ibero-American television experienced internationalization flows very early, mainly referring to the circulation and commercialization of scripts, as well as the presence of American series and films in the programming grid of all countries. The processes became more complex over the decades and expressions such as transverse television (Straubhaar, et. al., 2021) and transnational television (Chalaby, 2016) have been used to name new manifestations of the phenomenon, in particular, how *streaming* platforms and VoD have shaped a new era of offer and consumption but have also affected ways of production.

In this chapter we will analyze three manifestations of the phenomenon in Uruguay: one is the historical broadcast TV trend of importing programs of different genres, especially fiction; another is the local production of large formats, realities and or contests, such as *Master Chef* or *¿Quién es la Máscara?*, which have versions in different countries, showing a global homogenization of the offer; finally, Uruguay's participation in the internationalization of television fiction production processes, by producing series for platforms such as Prime Video or HBO Max, which however have other countries of origin.

1. The Audiovisual Context of Uruguay in 2022

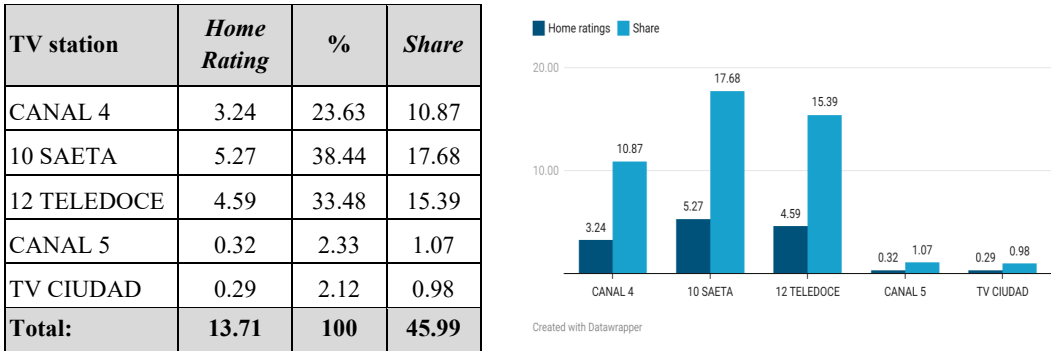
1.1. Broadcast television in Uruguay

Chart 1. National broadcast television networks/ channels in Uruguay

Networks/private channels (3)	Networks/public channels (2)
Canal 4 (Channel 4)	Canal 5
Saeta (Channel 10)	TV Ciudad
Teledoce (Channel 12)	
PRIVATE CHANNELS TOTAL= 3	
PUBLIC CHANNELS TOTAL= 2	

Source: Obitel Uruguay

Graph 1. TV rating and share by station¹



Source: Kantar Ibope Uruguay.

For this report we used audience data from public channels, which did not occur for several years; this enabled us to have a complete picture of the audience preferences in terms of *rating* and *share*.

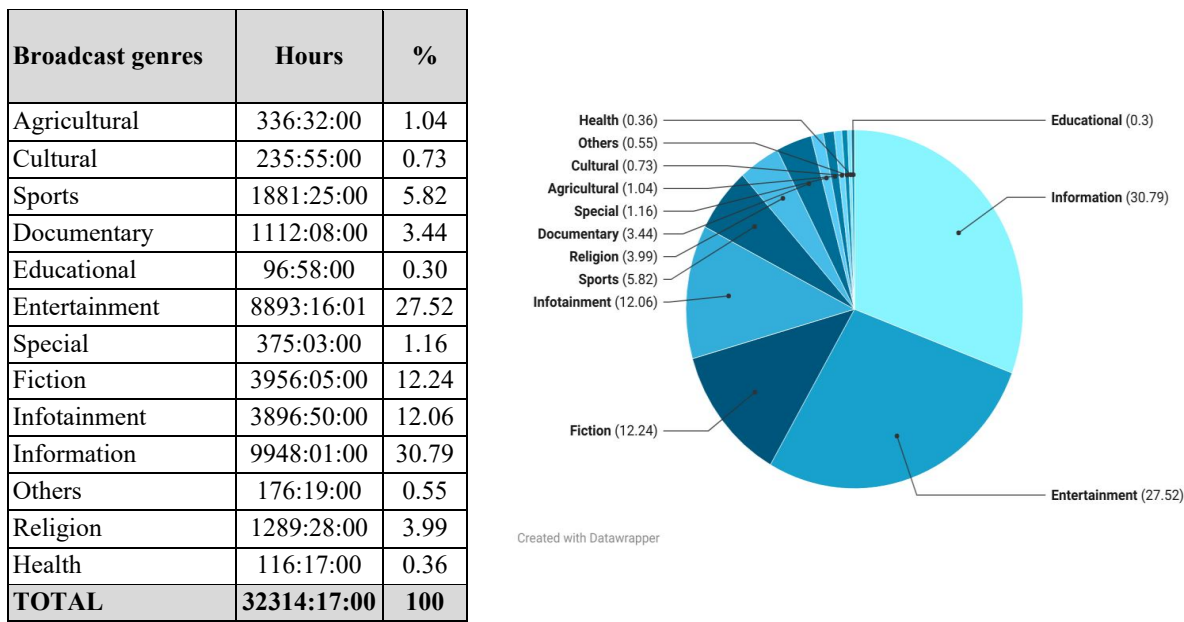
Graph 1 shows that Channel 10 Saeta maintained its predominance with 5.27 *rating* points and Teledoce followed shortly behind with 4.59 points. Public channels kept the historical trend of very low audience levels.

Broadcast television audience has been declining in its global volume and this occurred again in 2022. In a diachronic perspective, the successive reports of Obitel Uruguay revealed how, while in 2013 the *share* exceeded 60% and the *rating* was 21 points, in 2014 –with 58% *share* and 18.7 *rating*– began a decline that continues until today. In 2021 the total *rating* had been 14.81 and in 2022 it fell again by one

¹ We thank Kantar Ibope Uruguay for providing us with the necessary data for producing this report, especially we want to recognize the collaboration of Carolina Arigón and Valentina Cal for the generosity of their time.

point. Broadcast television as a whole reached almost 50% of the share and pay-TV 31%, while the remaining 20% refers to the consumption of other contents. If the type of viewing of broadcast television and pay-TV is considered, 67% of consumption is individual and 33% is co-viewing (Kantar Ibope Uruguay, 2023).

Graph 2a: TV broadcast genres and programming hours²



Source: Obitel Uruguay based on Kantar Ibope Media Uruguay data

Graph 2a represents how broadcast hours are distributed among television genres of all origins, including domestic and imported production. The data reveal the consolidation of a trend that has been settling in the last five years: the hegemony of the information and entertainment categories in screen time and the decrease in the number of hours devoted to fiction.

In 2022, information and entertainment accounted for 58.31% of total hours. Fiction, almost in the same percentage as infotainment, ranks third, but this is not the novelty because it has already happened before³, but the most substantive is the reduced number of hours devoted to this genre, 3,956 hours, representing 12.24% of the total hours, confirming the phenomenon of the shift of such programmes to entertainment programmes as has been noted in Obitel’s previous reports.

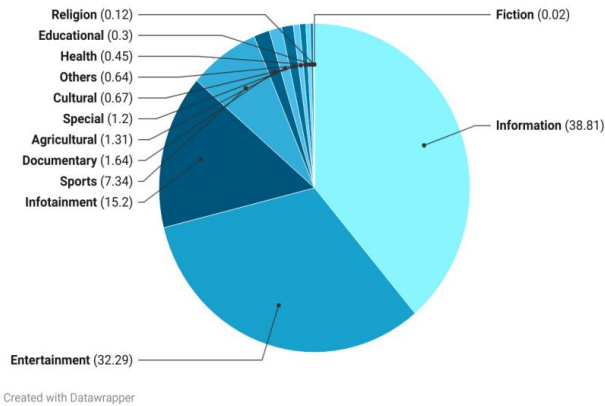
² The programming graphs include this year again the programming of Channel 5 that we had not been able to report between 2017 and 2021, as it was not included in the measurements of Kantar Ibope. The programming or broadcast hours of Tevé Ciudad are not included because it is a channel of Montevideo.

³ Thus, in 2016 and 2017 fiction ranked third place in screen time, but the volume was 7,850 hours, which represented 26% of the total broadcast. In 2014 it ranked first with more than 8,000 hours.

The hours occupied by domestically produced programmes accounted for 79% of total broadcast hours. The distribution between the different genres is detailed in Graph 2b.

Graph 2b. Broadcast TV genres of national production

Genre	Broadcast hours	%
Agricultural	336:32:00	1.31
Cultural	171:14:00	0.67
Sports	1881:25:00	7.34
Documentary	420:06:00	1.64
Educational	77:43:00	0.30
Entertainment	8277:00:00	32.29
Special	308:35:00	1.20
Fiction	06:02:00	0.02
Infotainment	3896:50:00	15.20
Information	9948:01:00	38.81
Others	164:41:00	0.64
Religion	30:25:00	0.12
Health	116:17:00	0.45
	25634:51:00	100



Source: Obitel Uruguay based on Kantar Ibope Media Uruguay data

The programming structure shows that the broadcast television channels defined a screen time distribution strategy that prioritized information, mainly newscasts and some journalistic programs, allocating 38.81% of the screen time to that genre and 32.29% to entertainment. The resources devoted to production were directed to the latter: some large international formats and, in some cases, new national programs that depend on those. National television fiction is the great absentee this year. The six hours assigned to fiction recorded in the graph correspond to a Uruguayan film cycle broadcast by Channel 5.

1.2. Pay-TV and VoD platforms in Uruguay

Chart 2. Main pay-TV networks in Uruguay

Network	Origin
TCC	Uruguay
Nuevo Siglo	Uruguay
Cablevisión (Flow)	Argentina
Multiseñal	Uruguay
Montecable	Uruguay
Direct TV	United States

Source: Obitel Uruguay

According to the annual report of the Communications Services Regulatory Unit (Ursec, 2022) the television services for subscribers were 573,746 and had a slight decrease compared to the previous year, with 33,163 fewer ones. Direct TV has 30% of the market, Cablevisión 8%, TCC 7%, Nuevo Siglo 6% as well as Montecable, while 2% corresponds to Multiseñal. 53% of the services are in Montevideo and the metropolitan area (pp. 116-117). In October 2022, Direct TV, which offers satellite television services throughout the country, joined the Uruguayan Chamber of Television for Subscribers (CUTA), which brings together 82 television cable operators from the rest of the country, which meant a change in the relationship with its main competitor (Búsqueda, 2022).

The main international SVoD platforms are Netflix, Amazon Prime, HBO Max, Flow (Cablevisión), Movistar+ (Telefónica), Claro Video (América Movil), Disney+, Star +, Paramount+, Mubi (Cinema – feature films). In addition, two national platforms operate. One is Cinemateca, dedicated exclusively to cinema, and the other is the public platform dependent on the state telephone company National Telecommunications Administration (Antel), VeraTv that in August 2022 was renamed as AntelTV.

In March 2022 was announced the availability for Uruguay of the free streaming platform Vix, from the Televisa-Univision group. It is an AVOD service (advertising-based video on demand) that offers mainly soap operas from Televisa. This platform would be added to another already operational AVOD: Pluto TV. Both function as live channels that also enable on-demand content.

1.3. Sources of financing for the audiovisual sector

As in previous years, information on financing is difficult to access. According to data provided by Kantar Ibope, prepared from Monitor Evolution, 92.77% in

a media advertising investment in 2022 was devoted to television. In television fiction, the five main advertisers took around 545,374 seconds.

The state support instruments continue to be the same as those reported in previous yearbooks with the exception that in 2022 there was no call for SeriesUy, a public fund intended to support national television fiction.

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

The most relevant event of the year 2022 was the change in the institutional framework for the audiovisual sector. The Uruguayan Film and Audiovisual Agency (ACAU) was born, replacing the Uruguayan Film and Audiovisual Institute, created in 2008⁴ and which depended on the Ministry of Education and Culture. The new agency is a non-state legal entity of public law whose function will be the management of already existing incentive instruments, in addition to generating others that give impetus to the development of “the national film industry, within the framework of creative and cultural industries” (Law 20075). The new agency has a paid director and an honorary representative from the Ministry of Education and Culture (MEC), another from the Ministry of Industry, Energy and Mining (MIEM) and another from the Ministry of Economy and Finance (MEF), in addition to a representative of the audiovisual sector. The board of the new entity took office in January 2023.

The proposal for the creation of the new institutional framework -included in the Accountability Law discussed in Parliament in mid-2022- caused opposition in some sectors. One of the controversial aspects referred to the suspicion that it would have an exclusively industrial orientation to the detriment of the cinematographic and artistic aspects, because of the dependency of the MIEM Agency and the absence of a definition of a cinematographic work in the original project. Dialogue and negotiation took place between different actors and the original text was finally modified. The registration of the Agency’s operation in the orbit of the MEC and its Directorate of Culture, in addition to the explicit emphasis on cinema, including the definition of a cinematographic work, led to a certain consensus for its creation. ACAU will have a budget of 40 million pesos and the Cinematographic and Audiovisual Promotion Fund of 54 million pesos, in addition to other funds that may be assigned.

1.5. Digital and mobile connectivity infrastructure

Internet and mobile telephony infrastructure is provided mainly by Antel⁵. Fixed broadband services have grown steadily in the last decade and reached 1,135,500 in

⁴The predecessor of this institution was the National Audiovisual Institute created in 1994 (under the government of Luis Alberto Lacalle Herrera by Decree N° 270/994) which had, among other tasks, to prepare a draft Law for the Promotion of national audiovisual production. Finally, in 2008 the Law for the Creation of the National Film and Audiovisual Institute and the Film and Audiovisual Promotion Fund (Law N° 18284) was passed, modified partially with the creation of this new agency.

⁵A more detailed description of these aspects can be found in the 2019 Yearbook chapter, “Uruguay: broadcast television, the new actors and the rules of the VoD game” (Sánchez Vilela, Gadea, 2019, pp. 379-382).

2022. Almost all of them are operated by Antel and only 2,027 services correspond to the company Enalur (known in the market as Dedicado) which lost 50% compared to what it had in 2018.

98% of the services are residential and the rest correspond to the government and companies. 93% are wired connections -they all belong to Antel- and the predominant transmission medium is optical fibre, covering 87% (Ursec, 2022, pp. 44-48). The laying of optical fibre enabled wide coverage of high-speed internet access, positioning Uruguay as a case that stands out in the region. The expansion of connectivity provides good conditions for the consumption of internet television.

In 2022 the Executive authorized five cable operator companies to provide internet services in their coverage areas. Media Law 19307 passed in 2014 prevented these companies from providing this service. In 2016 article 56 that established this imposition was appealed as unconstitutional to the Supreme Court of Justice, which ruled in favour of the companies. In June 2022, the current government made the authorization effective, as a first phase of new authorizations for cable companies in the rest of the country. These companies will be able to negotiate with Antel the use of the state telephone infrastructure or invest in optical fibre rewiring to offer television and internet service. The political opposition has pointed out that this resolution weakens the state telecommunications company, Antel.

As for mobile telephony, the upward trend continued with 6,247,641 services at the end of the year: 57% correspond to Antel, 26% to Movistar and 17% to Claro. Mobile broadband subscriptions were 3,670,007 and 62% were concentrated by Antel (Ursec, 2022, p. 69). On the other hand, the number of people with a smartphone reached 2,450,000 (Radar Group, 2022) in a population of around 3,400,000 inhabitants.

According to the survey *El Perfil del Internauta Uruguayo* (Grupo Radar, 2022), the entire population lives in homes that have some type of device with internet access. 97% live in homes with a smartphone and 72% with a Smart TV. The gap in access to devices by socioeconomic status is reduced in relation to the smartphone: 95% of the low income level population have a device of this type in their home and 99% of the high income level. On the other hand, the gap increases by about thirty points when referring to Smart TVs or other types of devices. In any case, of the total equipment with internet access, the sum of smartphones and Smart TVs constitutes 60%, while only 10% corresponds to Plan Ceibal and Ibirapitá computers.

The survey reveals a 97% internet penetration, with a reduction in the access gap of two points between the highest and lowest levels. Regarding the age ranges, a growth in the last two years was observed in people over 65 years of age: nine out of ten are internet users. An increase was also found in children under five years of age: three out of four use the internet (Grupo Radar, 2022).

41% of those surveyed spend more than ten hours a day using the internet. Regarding audiovisual consumption, 69% used the internet to watch movies or series and 26% watched internet television channels. The preferred device for watching

movies or series is the Smart TV (54%), followed by the cell phone with 48%, while the preference for TV with Chromecast is 18%. The preferred social networks are Facebook and Instagram, 76% and 74% respectively; in third place is Tik Tok with 34% and Twitter dropped to 23%.

As for Digital Television (DTV), so far no single date has been established for the analog blackout. Progress has been made gradually since the first broadcasts in 2012 and there are some towns in the rest of the country where only DTV is broadcast. Meanwhile, the channels will continue to broadcast digital and analog programming in parallel⁶.

2. Analysis of the Year: National and Ibero-American premiere fiction in 2022

TABLE 1. Premier fictions aired in 2022
(national, foreign of Obitel, and coproductions).

PREMIER NATIONAL TITLES- 0	PREMIER FOREIGN TITLES - 14
	Canal 4
	1. <i>El Secuestro de Mateo</i> (soap opera, Chile)
	2. <i>Juegos de Poder</i> (soap opera, Chile)
	3. <i>Oro Verde</i> (soap opera, Brazil)
	Teledoce
	4. <i>Corazón de Madre</i> (soap opera, Brazil)
	5. <i>Corran por sus Vidas</i> (soap opera, Brazil)
	6. <i>Éramos Seis</i> (soap opera, Brazil)
	7. <i>La Usurpadora</i> (soap opera, Mexico)
	8. <i>Los Ricos también Lloran</i> (soap opera, Mexico)
	9. <i>Orgullo y Pasión</i> (soap opera, Brazil)
	10. <i>Rock Story</i> (soap opera, Brazil)
	11. <i>Si nos Dejan</i> (soap opera, Mexico)
	12. <i>Sol Naciente</i> (soap opera, Brazil)
	13. <i>Solo se Vive Dos Veces</i> (soap opera, Brazil)
	Canal 5
	14. <i>Vivir Sin Permiso</i> (series, Spain)
	PREMIERE TITLES BROADCAST
	TOTAL: 14

Source: Obitel Uruguay.

The number of Ibero-American premieres remained stable compared to the previous year in terms of the quantity of titles. However, it confirms the reduction that

⁶ Details of locations can be found at <https://www.gub.uy/ministerio-industria-energia-mineria/comunicacion/noticias/despliegue-television-digital>

occurred from 2020 when the drop to 16 titles, in contrast to the 27 premieres of 2019. Another relevant aspect regarding this decline in Ibero-American fiction is the total absence of premieres on Channel 10 Saeta. Teledoce continues to be the channel that broadcasts more Ibero-American fiction: ten of the fourteen premieres were broadcast on that channel. Added to this panorama is the absence of national fiction.

TABLE 2. National premiere fiction formats in 2022 and their evolution in the last five years.

Format	Titles						Hours					
	2018	2019	2020	2021	2022	Total	2018	2019	2020	2021	2022	Total
Soap opera	0	0	0	0	0	0	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00
Series	0	1	1	1	0	3	00:00:00	3:22:30	46:52:30	8:00:00	0:00:00	58:15:00
Miniseries	1	0	0	0	0	1	7:33:11	0:00:00	0:00:00	0:00:00	0:00:00	7:33:00
Sitcom	0	0	0	0	0	0	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00
Unitary	0	0	0	1	0	1	0:00:00	0:00:00	0:00:00	4:50:00	0:00:00	4:50:00
Docudrama	0	0	0	0	0	0	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00
Others	1	0	0	0	0	1	8:19:30	0:00:00	0:00:00	0:00:00	0:00:00	8:19:30
TOTAL	2	1	1	2	0	6	15:52:41	3:22:30	46:52:30	12:50:00	0:00:00	78:57:41

Source: Obitel Uruguay based on Kantar Ibope Media Uruguay data.

In the last five years, six national titles have been produced, mostly broadcast by public television networks, with a total of 78 hours and 57 minutes. In 2022 there was no national production. Financing difficulties, lack of investment from private television channels and the slow pace of the execution of the few projects result in low productivity in screen time.

TABLE 3. Premiere fiction aired in 2022: countries of origin

Country	Titles	%	Hours	%
NATIONAL (total)	0	0	0:00:00	0
OBITEL COUNTRIES (total)	14	100	770:18:00	100
Argentina	0	0	0:00:00	0
Brazil	8	57	494:16:00	64
Chile	2	14	99:00:00	13
Colombia	0	0	0:00:00	0
Ecuador	0	0	0:00:00	0
Spain	1	7	32:33:00	4
US Hispanic	0	0	0:00:00	0
Mexico	3	21	144:29:00	19
Peru	0	0	0:00:00	0
Portugal	0	0	0:00:00	0
Uruguay	0	0	0:00:00	0
Venezuela	0	0	0:00:00	0
COPRODUCTIONS (total)	0	0	0:00:00	0
National Coproductions	0	0	0:00:00	0
Obitel Countries Coproductions	0	0	0:00:00	0
TOTAL	14	100	770:18:00	100

Source: Obitel Uruguay based on Kantar Ibope Media Uruguay data.

The countries of origin of the 2022 Ibero-American titles were Brazil, Mexico⁷, Chile and Spain, with a preponderance of the former, which provided 64% of the premier hours. For the second consecutive year, the absence of Argentine television fiction premieres on national broadcast TV screens has been observed, while Chile has once again had a presence in the offer. Regarding the formats, the almost absolute predominance of the soap opera is observed (See Table 4).

In global terms, the number of hours assigned to Ibero-American fiction premieres constituted 19.46% of the total hours dedicated to fiction programming of all genres and origins, including the broadcast of films. The reduction of television fiction in the programming is also shown in the decrease in titles of Turkish origin, which had a strong presence since 2015. In 2022, six titles of that origin were offered, three less than the previous year.

⁷ The labelling of these titles as Mexican shows the complexity of the current processes of transnationalization. These are fictions from TelevisaUnivision, which is a transnational conglomerate, and are produced by W Studio, which is a binational, Mexico-USA production company.

TABLE 4. Formats of national and Ibero-American fiction exhibited in 2022

Format	Titles				Hours			
	Nationals	%	Other Obitel countries	%	Nationals	%	Other Obitel countries	%
Soap operas	0	0.0	13	92.9	0:00:00	0.0	737:45:00	95.8
Series	0	0.0	1	7.1	0:00:00	0.0	32:33:00	4.2
Miniseries	0	0.0	0	0.0	0:00:00	0.0	0:00:00	0.0
Telefilm	0	0.0	0	0.0	0:00:00	0.0	0:00:00	0.0
Unitary	0	0.0	0	0.0	0:00:00	0.0	0:00:00	0.0
Docudrama	0	0.0	0	0.0	0:00:00	0.0	0:00:00	0.0
Others	0	0.0	0	0.0	0:00:00	0.0	0:00:00	0.0
TOTAL	0	0.0	14	100	0:00	0.0	770:18:00	100

Source: Obitel Uruguay

TABLE 5. Ten most viewed titles in 2022

Title		Channel	TV Producer (Country)	Format/genre	N°of chap/ep in 2022	Time Slot	Rating	Share
1	<i>Si nos Dejan</i>	Teledoce	Televisa-Univisión	Soap opera	99	Afternoon	9.04	19.95
2	<i>Corazón de Madre</i>	Teledoce	Globo	Soap opera	52	Afternoon	7.77	19.88
3	<i>Sol Naciente</i>	Teledoce	Globo	Soap opera	125	Afternoon	6.42	16.41
4	<i>Éramos Seis</i>	Teledoce	Globo	Soap opera	50	Afternoon	5.30	15.25
5	<i>Solo se Vive Dos Veces</i>	Teledoce	Globo	Soap opera	10	Afternoon	5.07	14.6
6	<i>Rock Story</i>	Teledoce	Globo	Soap opera	115	Afternoon	4.93	13.85
7	<i>Los Ricos también Lloran</i>	Teledoce	Televisa-Univisión	Soap opera	41	Afternoon	4.81	13.97
8	<i>La Usurpadora</i>	Teledoce	Televisa-Univisión	Soap opera	13	Night	4.64	11.68
9	<i>Orgullo y Pasión</i>	Teledoce	Globo	Soap opera	81	Afternoon	4.36	12.99
10	<i>Corran por sus Vidas</i>	Teledoce	Globo	Soap opera	80	Afternoon	4.27	13.12
Total National Productions: 0				Original Foreign Scripts: 10				

Source: Obitel Uruguay based on Kantar Ibope Media Uruguay data

The ten most viewed premiere titles of the year were broadcast entirely by Teledoce and were mostly produced by Globo. Although this channel has historically led the top ten, you have to go back to 2015 to see an absolute predominance like the one shown in Table 5.

As for the *ratings*, if we compare them with those of the ten most viewed of 2021 we will observe a significant decrease. Except for the first three titles, the rest of the fictions that make up the top ten of 2022 were below six *rating* points, while the previous year the ten titles were above that level. On the other hand, unlike previous years in which some Turkish fiction reached higher *rating* values than the ten most watched of Ibero-American origin, in 2022 none surpassed the nine points of *Si nos Dejan*. The most watched Turkish soap opera was *Tierra Amarga*, with 8.40 *rating* points and 21.48 *share*. Thus, it is observed a general decrease in the volume of audience that preferred fiction, probably because of the time slot assigned to those programs.

TABLE 6. Audience profile of the 10 most watched titles:
gender, age, socioeconomic status

Title		Channel	Gender %		Socioeconomic Status%				
			Women	Men	U+U-	M+	M	M-	L+L-
1	<i>Si Nos Dejan</i>	Teledoce	73.23	26.77	9.90	15.90	25.28	18.30	30.61
2	<i>Corazón De Madre</i>	Teledoce	72.61	27.39	9.61	20.00	25.63	22.78	21.98
3	<i>Sol Naciente</i>	Teledoce	67.48	32.52	9.39	15.09	24.02	21.88	29.62
4	<i>Éramos Seis</i>	Teledoce	70.28	29.72	15.20	17.10	24.16	22.47	21.06
5	<i>Solo Se Vive Dos Veces</i>	Teledoce	71.03	28.97	6.87	8.79	25.64	21.41	37.30
6	<i>Rock Story</i>	Teledoce	65.79	34.21	13.29	14.00	23.09	21.34	28.28
7	<i>Los Ricos También Lloran</i>	Teledoce	72.05	27.95	11.49	6.94	25.46	18.81	37.30
8	<i>La Usurpadora</i>	Teledoce	69.82	30.18	10.72	10.10	26.30	33.53	19.34
9	<i>Orgullo Y Pasión</i>	Teledoce	62.90	37.10	9.61	11.67	22.64	28.63	27.45
10	<i>Corran Por Sus Vidas</i>	Teledoce	68.31	31.69	17.08	9.19	28.46	22.08	23.20

Title		Channel	Age Group %						
			4-11	12-17	18-24	25-34	35-49	50-59	60+
1	<i>Si Nos Dejan</i>	Teledoce	3.71	2.43	5.70	12.47	13.42	12.51	49.76
2	<i>Corazón De Madre</i>	Teledoce	2.34	3.36	4.07	10.83	18.80	11.58	49.02
3	<i>Sol Naciente</i>	Teledoce	3.66	2.78	5.35	16.35	15.20	14.28	42.38
4	<i>Éramos Seis</i>	Teledoce	2.69	4.24	4.02	11.05	19.93	13.95	44.12
5	<i>Solo Se Vive Dos Veces</i>	Teledoce	9.68	3.90	3.49	16.50	14.48	5.54	46.41
6	<i>Rock Story</i>	Teledoce	5.25	3.80	5.28	16.48	18.34	13.69	37.17
7	<i>Los Ricos También Lloran</i>	Teledoce	5.79	3.21	4.90	15.48	12.28	15.95	42.38
8	<i>La Usurpadora</i>	Teledoce	2.55	3.34	5.66	15.54	19.13	14.21	39.56
9	<i>Orgullo y Pasión</i>	Teledoce	4.91	4.30	5.72	17.41	14.23	17.85	35.57
10	<i>Corran Por Sus Vidas</i>	Teledoce	4.78	5.30	4.91	13.85	21.82	14.10	35.23

Source: Obitel Uruguay based on Kantar IBOPE Media Uruguay data

The structure of the audience of the ten most watched titles maintains the historical trend of an audience made up mostly of women and people over 60 years of age. The first age ranges that had slightly risen in the last two years, probably as a result of the pandemic, fell again.

Regarding socioeconomic status, the audience of these titles is mainly made up of people located in the middle and lower sectors. However, there are some specific observations that we consider relevant. In the first place, it is verified that there are some titles such as *Éramos seis* or *Corran por Sus Vidas*, with 15% of their audience in the first case and 17% in the second belonging to the two upper levels of income (U+ and U-), and the rest of their audience is distributed in similar percentages between the medium and low levels. On the other hand, *Los Ricos También Lloran*, *Solo se Vive Dos Veces* or *Si nos Dejan*, register higher percentages of their audience located in levels L+L-: 37.30% of their audience in the first two, and 30.61% in the last one corresponded to those sectors. In general terms, a greater presence of middle income sectors were observed in the structure of the audience compared to previous years.

3. 2022 VoD monitoring 2022

3.1. VoD Platforms Market in 2022

As pointed out in section 1.2, some 11 VoD platforms offering television fiction are operating in Uruguay, in addition to two AVOD platforms, all of them private and international.

Although the use of the internet and the consumption of VoD platforms have expanded, broadcast television continues to be the main source of information and entertainment in Latin America, with daily individual consumption of around four hours, while daily consumption of streaming platforms reaches 1.3 hours a day (Produ, 2023). In Uruguay, the average television viewing time was three and a half hours per day, including broadcast and pay-TV (Kantar Ibope Uruguay, 2023).

The latest report from *El Perfil del Internauta Uruguayo* showed that *streaming* platforms in Uruguay reached two million users by the end of 2022. Netflix led the ranking with more than one million users, but the growth of other platforms such as HBO Max continued, with more than 300,000, while Disney+ and Amazon Prime already exceeded 200,000 each. The survey revealed that Netflix was the favourite to watch movies with 76%, followed by YouTube with 53%, HBO Max with 17%; very close were Disney+ and Prime Video with 10%. 96% of those surveyed have installed the YouTube application on their cell phones while the presence of applications from *streaming* platforms such as Netflix (56%) and online television channels (23%) are growing (Grupo Radar, 2022).

According to the *Social Media Intelligence* report by Kantar Ibope Uruguay, the most outstanding fictions for Uruguayan audiences were HBO Max's *House of the Dragon*, Star+'s *El Encargado* and *Santa Evita*, and Netflix's *Stranger Things*. Pluto Tv appeared prominently, but at events such as the 2022 MTV MIAW Awards (Kantar Ibope Uruguay, 2023).

3.2. Offer of local VoD platforms in 2022 (national, regional within the country)

Uruguay has a state VoD platform that belongs to Antel telephone company (Antel TV) that allows free and paid access to some national and international content but does not produce its own content. In 2022, Antel signed an agreement with channels 4, 10 and 12 for which it will pay 1.2 million dollars annually, which will allow access through Antel TV to the live or on-demand transmission of those channels, but exclusively on cell phones with Antel services, excluding other devices.

Towards the end of the year, Antel's agreement with Disney was accomplished, through which the state platform offers access to Disney+ and Star+ to its clients with optical fibre or cell phones, with different costs, depending on the type of plan they have with Antel. These agreements are added to those that already provided access to Quivit TV, Spotify or Netflix.

3.3. VoD analysis in 2022: national premiere fiction and co-productions

It was not possible to report Uruguayan fiction on VoD platforms in 2022. However, it could not be said that Uruguay was completely absent from the offer of platforms such as Prime Video or HBO Max. This paradoxical statement is explained by the processes of internationalization of production that we will deal with in section 6. Series such as *Porno y Helado* and the second season of *El Presidente*, as well as *Ámsterdam* and *Sentença*, the four released in 2022, were produced in Uruguay, with independent national companies and human resources in different roles (actors, editors and various technical staff), who developed production and post-production services.

4. Interactivity and audience participation

The absence of national television fiction premieres in 2022 led us to choose one of the imported fictions for this section. As mentioned before, Teledoce has been the channel with the most programming of Ibero-American fiction premieres and broadcast all the titles that make up the *top ten*, so the soap opera *Si nos Dejan* was chosen, not only because it was the one that ranked first in the top ten, but because it was the one that showed the greatest presence in terms of interactivity and audience participation and, also, shows the strategies that the channel used in general.

Interactivity design involves defining the contact environments between the product being broadcast and the audience, implementing the mechanisms to make it visible, promoting its consumption and interaction. In the case of *Si nos Dejan*, the interactivity designed by the channel was limited to a propagation strategy⁸, based

⁸ Fecine (2013) defines propagation strategies that are articulated from contents whose statements do not depend on the action of the addressee to be completed. The author also identifies strategies that appeal to playful contents, where the recipient is invited to participate in some type of transmedia experience and other of expansion that encompass procedures that complement or go beyond the narrative universe broadcast on television (p.34).

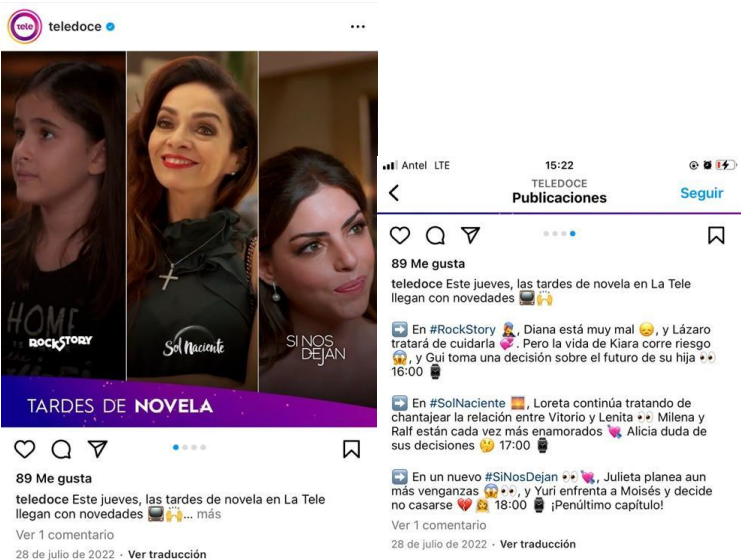
on anticipation content and recovery content of the episodes. The instruments used were the official accounts of Teledoce on Twitter, Facebook and Instagram.

The propagation strategies aim to reiterate and have an impact on the content of the series among different media and platforms. One piece of content draws attention to another, promoting a feedback loop of interest and attention, between television and the internet, which helps maintain consumer involvement in the proposed universe. However, in the case of Teledoce these contents were limited and with little diversity. On Twitter (@teledoce) and Facebook, most of the posts consisted of anticipation content and recovery content, the former encouraging people to watch the episode that was about to be broadcast or anticipating a situation, and the latter inviting people to access the episodes already broadcast on the channel's website. Some of the posts use emojis representing reactions to the narrated situation as a way to emotionally involve the viewer or emphasise the immediateness of the broadcast.



The content published on Instagram was even scarcer, compared to the other two social media networks, since the material related to the soap opera was part of the

channel strategy to install the afternoon slot as the space for the soap opera as a distinctive sign of Teledoce. Thus, a single publication *Tardes de novela* included images and anticipations of the other afternoon soap operas on the channel.



Regarding participation, all the instances had very low levels of effective interaction, which can be explained because, when it comes to calling for the creative and participatory involvement of the recipients, propagation strategies have limited potential, inciting a *like* or a comment. The greatest participation occurred on Facebook, which is consistent with the fact that it continues to be the most used social network in Uruguay, especially in the age range of the audience for this fiction. Participation was limited to *likes*, two or three comments, and few cases of sharing content. Even so, the participation is much higher than on Twitter and on Instagram (see the examples below).



5. The highlights of the year

Broadcast TV channels reaffirm their inclination to program entertainment and to invest resources in the production of this type of programs. They dedicate promotional spaces to them during commercial breaks and use the rest of their programs to create synergy in the installation of the product. For example, the central newscasts of channels 10 and 12 regularly mention as news some aspect of the shows, such as what was the identity of one of the participants of *¿Quién es la Máscara?* or what decisive instance occurs in *Got Talent*. In addition, “satellite” programs of these formats have been created, such as *Amamos el Talento* around the latter. The highlight of the year is the absolute predominance of national entertainment production in these formats by private channels.

The 2022 programs, which were added to those already installed, were *La Voz*, *¿Quién es la Máscara?* and the Uruguayan version of *Ahora Caigo*, which in its Spanish edition was on channel 10 screen for several years, even during the first months of 2022. However, not only these formats in local production occupied the central broadcast hours, but other imported programs such as the Spanish *El Desafío* or *El Hormiguero* were broadcast. But the most extreme event in this direction was the transmission of the Argentinian version of *Gran Hermano* that generated a derivative program of national production from Saeta Canal 10 -*La Previa de Gran Hermano*- in which some Uruguayan figures commented and analysed the progress of the reality show that was being broadcast in the neighbouring country. In this scenario, Ibero-American fiction has once again been relegated, and limited to afternoon and night time, after 11 pm.

When zapping broadcast television in prime time, it is difficult to find anything other than some entertainment program, whether national or imported, so that the aesthetics, the scenery, the sound, make the image on the screen very similar to the ones of many other televisions in the world. It is one of the manifestations of transnational television.

6. Theme of the year: Independent production companies and the internationalization of television fiction production in Ibero America

In Uruguay, the internationalization of television fiction production corresponds to what has been defined as a transnational media order “that is reassigning media spaces and involving new practices, flows and media products”, redefining the intertwining of the local, the national, the regional and the global (Chalaby, 2005, p.30). This new paradigm is characterised by fragmentation processes caused by the increasing number of companies that disaggregate and “outsource part or all of the production process” (Chalaby, 2016, p.37), and many times these processes

are internationalised. Thus, in the transnationalization of television, independent production companies acquired a fundamental role, both for fiction and for entertainment formats.

In the case of Uruguay, after the expansion of HBO Go, later HBO Max, Prime Video or Netflix, independent production companies carried out television fiction projects for these platforms, providing services related to filming, locations, production and post-production in general. However, these are not Uruguayan fictions, and are registered as products of Brazil, Argentina or Chile. In this section we will analyze this phenomenon, focusing on the last four years (2019-2022) and on the main production companies involved in these processes.

6.1. National structural level

In Uruguay, an independent production company is understood as a company dedicated to the production of audiovisual content for other national or international companies (television channels, platforms, advertising agencies, etc.) with which it maintains an autonomous relationship. A definition from the legislative point of view is the one offered by Law 19307 approved in 2014, which in its definitions chapter, dedicates article 3 to establish what is understood by independent production. It defines that independent production is “that carried out by a company that, not being the owner of audiovisual communication services, does not belong to or work exclusively for an owner of audiovisual communication services, and has the intellectual independence and the professional and technical capacity to produce programs with professional standards”.

In the directory of Uruguay Audiovisual⁹ 80 audiovisual production companies are registered, although it has been verified that not all of them appear in this registry. There is an organization, the Association of Film Producers and Directors of Uruguay (Asoprod, <http://asoprod.org.uy/>), created in 1994 with the purpose of promoting national fiction and documentary cinema and which brings together a good number of the producers linked to audiovisual production in recent decades, but the affiliation is personal and not that of the production companies. However, taking the Uruguay Audiovisual list as a reference, it can be observed that some production companies are mainly focused on advertising, others towards fiction or documentary films and to a lesser extent towards television fiction itself. Although in many of the production companies' websites the development of television fiction projects is announced, then no specific products are registered. In general, they are small companies that work on their own projects, sometimes in co-production or for international production companies to which they provide services, so they hire personnel in relation to the size of those projects.

⁹ <https://uruguayaudiovisual.com/directorio-empresas-instituciones/>

The initiatives to promote the internationalization of production to promote the development of the audiovisual industry led to the creation in 2016 of what was called Uruguay Audiovisual, which is the brand of the audiovisual industry in Uruguay. It was a specific development of the Uruguay Natural country brand¹⁰. Its purpose is to contribute to the development of the sector and position the country as a place for audiovisual production. It connects public institutions -Ministry of Education and Culture, Ministry of Industry and Energy, Montevideo Audiovisual (Municipality of Montevideo), Uruguay XXI¹¹- and private organizations such as Asoprod and the Business Chamber of Advertising Producers of Uruguay, which brings together all the advertising production companies in the country.

6.2. The most relevant production companies

For the survey of the internationalization of television production in Uruguay, we have taken as a reference the implementation of the Uruguay Audiovisual Program (PUA) that had its first pilot test in 2019, and which was adopted as a continuous policy from 2020. It is a program that has a national and an international line and that consists of the refund of up to 25% of the production expense made in the country (*cash rebate*), which varies according to the size of the production and has different maximum refund limits. Although before that year fictions were produced for platforms with the participation of national production companies¹², it is the implementation of the PUA as a policy, added to the one that already existed of zero VAT, which gave a boost to the development of the audiovisual industry linked to television fiction in the country. This instrument encouraged local production companies to seek major international projects that would not be possible within the restricted framework of the Uruguayan market. Although the state support of the PUA is a central factor, not all the projects accomplished in this period used it.

The companies linked to the production of television fiction for platforms are: Cimarrón Cine, Salado and La Productora Films. The fictions in which they played a leading role are detailed in the following table.

¹⁰ See <https://marcapaisuruguay.gub.uy/comenzo-el-desarrollo-de-la-marca-sectorial-audiovisual/>

¹¹ It is the agency responsible for the promotion of exports, investments and country image. It works to boost the export capacity and competitiveness of Uruguayan companies, promote the country as an attractive place for productive investments and promote the Uruguay Natural Country Brand.

¹² Such is the case of *El Hipnotizador*, released in 2015 and 2017 for HBO, with locations in Montevideo and production by Oriental Films.

Title	Release/ Situation	Platform	Production company	Origin
<i>Conquest</i>	No date	Netflix	Salado	
<i>Impuros</i>	2018, 2019, 2021 three seasons available, 4th and 5th in post- production	Prime Video/ Star+	Cimarrón	Brazil
<i>Manhãs de Setembro</i>	2021	Prime Video	Cimarrón	Brazil
<i>Dom</i>	2021	Prime Video	Cimarrón	Brazil
<i>Desjuntados en Río</i>	2021	Prime Video	Salado	Brazil
<i>Maradona: Sueño Bendito</i>	2021	Prime Video	La Productora Films	Argentina
<i>Lov3</i>	2022	Prime Video	Cimarrón	Brazil
<i>Insanía</i>	2022	Star+	Cimarrón	Brazil
<i>Iosí, el Espía Arrepentido</i>	2022 and second season in post- production.	Prime Video	Cimarrón	Argentina
<i>Ámsterdam</i>	2022	HBO Max	Cimarrón	Mexico
<i>Sentença</i>	2022	Prime Video	Cimarrón	Brazil
<i>Porno y Helado</i>	2022	Prime Video	Salado	Argentina
<i>El Presidente (2)</i>	2022	Prime Video	Salado	Chile
<i>Barrabrava</i>	Premiere scheduled for june 2023	Prime Video	Cimarrón	Argentina
<i>Cromañón</i>	In post- production	Prime Video	Cimarrón	Argentina

Source: Obitel Uruguay

Towards the end of 2019, the first project, *Conquest*, was produced with the application of the PUA incentive, which had a great impact in the local press and started a policy recognized as successful. This fiction has not been released and it is not clear what the situation is, but with it began a revitalization of the sector through the *cash rebate* instrument.

In our survey, 15 television fiction series were identified for international platforms between 2019 and 2022, some have already been released and others are in different stages of production, generally in post-production. *Impuros*, premiered its first season in 2018 for which Cimarrón provided production services; then another two seasons were released and there are two more in post-production with the same production company.

Cimarrón Cine is the production company with the greatest presence in these processes of internationalization of television fiction. Of the total of these fictions, ten received services of this production company and three of them are classified as

Cimarrón Originals. Of the rest of the titles, four involved Salado and one La Productora Films. Cimarrón and Salado have offices in Uruguay and in two other countries: in Mexico and Argentina, the first; in Puerto Rico and Argentina, the second.

The main platforms for which these production companies worked are Prime Video, HBO Max and Star+. An important part of these projects arose from the association of local production companies with regional offices of the platforms. For example, in *Sentença*, Amazon Brazil partners with Cimarrón to produce the series. In general, local production companies take the initiative in searching for projects, and associations are developed either for production or post-production services. However, in the cases of *Amsterdam*, *Sentença* and *Barrabrava*, they are originals from the Cimarrón production company (<https://cimarroncine.com/originales/>). The concept of “Original Cimarrón” for this production company implies that it strongly participated intensely in the development process of the idea and the project, before the platform acquired the intellectual property of the series¹³.

In the eyes of the viewer, these series are labelled as Brazilian, Argentine, Chilean or Mexican, however, the production was done in Uruguay, with Uruguayan human and technological resources, as well as many of the locations. Thus, stories that take place in São Paulo, such as the case of *Sentença* or *Manhãs de Setembro*, were shot in Montevideo; or the extreme case of the second season of *El Presidente* in which the action takes place in Switzerland, Africa or Rio de Janeiro and was shot without leaving Uruguay.

6.3. Some final considerations

The panorama of broadcast television in Uruguay shows different facets of internationalization: programming imports and the local production of international entertainment formats are two dimensions. As has been pointed out, 79% of the total hours of broadcasting are of national production, although this did not result in local investment for the production of television fiction. At the same time, the Uruguayan audiovisual industry has demonstrated the capacity to attract international fiction projects, although it has not yet generated its own production.

Some studies have revealed the impact of some of these productions supported by the PUA. Thus, the study by Ceres (2021) showed that the first project to which this *cash rebate* program was applied for the production of some scenes (*Conquest*), demonstrated that in an investment of 1.9 million dollars, for “every dollar an impact of 1.63 dollars was generated in the economy involving sectors other than the audiovisual industry” (p.2). Another study that analyzed two Cimarrón projects, *Sentença* and *Manhãs de Setembro Mahnas*, concluded that for each dollar of PUA reimbursement invested, 1.3 and 2.4 dollars of taxes were generated, in addition to the multiplying effect of the demand for audiovisual production services and the

¹³ Interview carried out by the author to Santiago López, May 2023.

generation of direct and indirect employment that produced “a mass of remunerations that implies multiplying by 3.1 to 5.6 times the amount invested in PUA” (CPA Ferrere, 2021). The sanitary conditions and stability of the country favoured the production of fiction projects in Uruguay for platforms during the pandemic. Activity has continued after the health emergency, although in a more competitive context.

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USA: SVOD, DIVERSIFICATION IN PRODUCTION,
CONCENTRATION IN OWNERSHIP

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Introduction

The reorganization of media corporations in the United States in the context of the Hispanic streaming market was reflected in the merging of Televisa and Univision in 2021. This merger created a very tangible effect in 2022 with the number of fiction titles being produced for its streaming platform with the introduction of Vix+. The new digital Hispanic media scenario witnessed not only the emergence of Vix+ as a platform in Spanish for a global audience, but also the decisive entry of platforms producing content in Spanish for the Latin American markets. In terms of producing original Spanish content, Netflix, Prime Video and HBOMax are joined in 2022 by Paramount+, Disney+, Star+, Lionsgate+, Canela and Pantaya the last before being acquired by TelevisaUnivision. The entry of these platforms has created a panorama in which the role of independent production houses has become central, having a diversifying effect on the production of content in the region, which has meant an internationalization of these *indies*. But at the same time it has meant through investmet in content production that the concentration of ownership in streaming platforms by corporate America has strengthened.

1. The Hispanic audiovisual context in the United States

1.1. Hispanic broadcast television in the United States

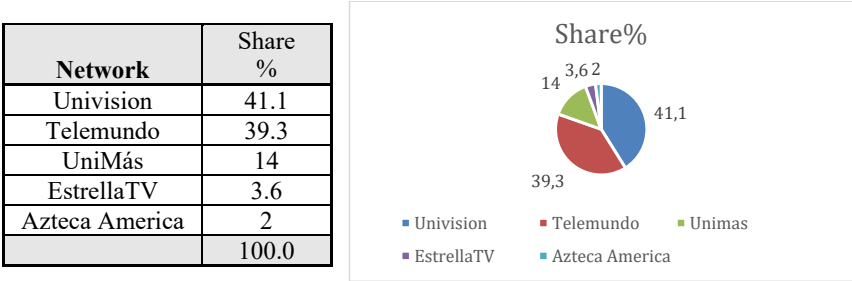
Table 1. National broadcasting Hispanic networks/channels in the United States

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

Source: Obitel EE.UU. Nielsen

As of 2022, the national broadcast television networks Univision and UniMás, were left under the newly created binational corporation TelevisaUnivision, product of the merger of Univision and Televisa. This corporation also owns four national broadcast television networks in Mexico: Channel 2 “El Canal de las Estrellas”, Channel 4 “ForoTV”, Channel 5 and Channel Nu9ve. However, for the purposes of Obitel, these networks will not be considered “national” because, despite their ownership, they are networks that are distributed only in Mexico. On the other hand, since 2016, TV Azteca, the Mexican corporation that owned the Azteca America network in the United States, sold it to HC2 Network. With this decision, Mexican TV Azteca recovered its investment for the launch of its USA network. In 2021, HC2 Networks changed its name to Innovate Corp, and in the corporate reorganization process, the sale of some of the network’s television stations began. Which led to the closure of the Azteca America network on December 31st, 2022. Thus, the network ended a cycle that began in 2001, closing its doors in 2022, 21 years after its launch. By 2023, there will only be four broadcast television networks left nationwide.

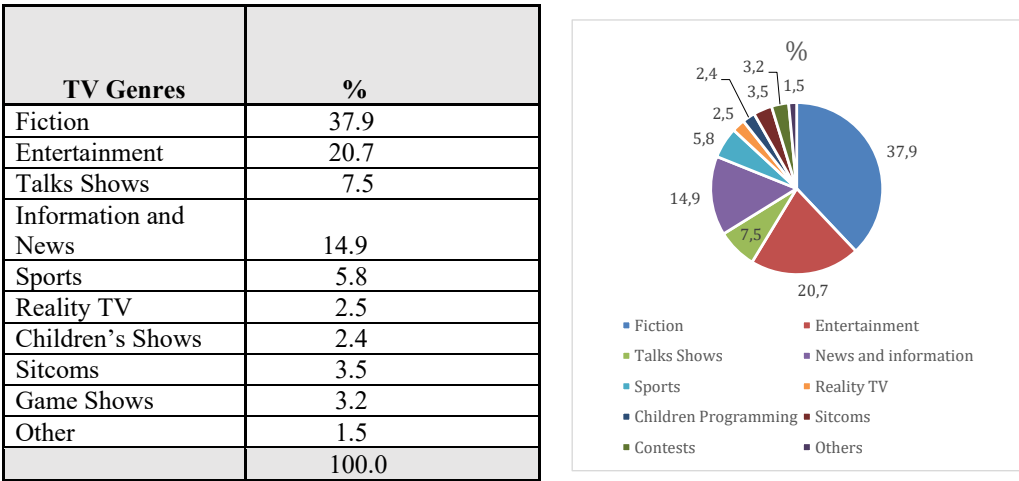
Graph 1. Ratings and TV shares by network



Source: Nielsen Obitel USA

Univision holds its leadership in audience share with 41.1%, less than one percentage point below the 41.9% of 2021. Telemundo maintained its second position with an audience share of 39.3%, but two points above the 37.7% of 2021. UniMás also maintained its third place with a 14% audience share, less than one percentage point compared to 14.7% in 2021. EstrellaTV remains in fourth place with a 3.6% share, but less than 4.3% in 2021. Azteca America closed the year in fifth place with a 2% share, which was the same percentage as in 2021.

Graph 2: Genres and hours transmitted in Hispanic TV programming



Source: Nielsen Obitel USA

Fiction remained the television genre with the most screen time with 37.9%, up from 37.1% in 2021. Entertainment remained in second place with 20.7%, up from 18.9 in 2021. While the news and information genre remained in the third with 14.9%, below the 17% of 2021; and sports in fourth place with 5.8%, below its 6.4% in 2021.

1.2. Pay TV and VoD platforms in the United States in 2022

Table 2. Hispanic Pay TV channels in the U.S.A.

10 most watched Pay TV channels in the country			
Channel	Genre	Origin	Home audience
TUDN	Sports	USA/Mexico	25,000
Discovery en Español	Information	USA	22,000
Galavisión	General	USA/Mexico	20,000
Universon	General	USA	18,000
Fox Deportes	Sports	USA	8,000
ESPN en Español	Sports	USA	8,000
Discovery Familia	Information	USA	7,000
CNN en Español	News	USA	6,000
HITN	Education	USA	4,000

Source: Nielsen Obitel USA

From the first time since ratings for Hispanic Pay TV networks were established Galavisión does not occupy the first place, and it will be displaced by a sport channel. The table shows how in Hispanic oriented cable television sports, news and information, and general oriented programming grids, dominate the audiences' ratings.

By 2022, the landscape of streaming platforms in the United States doesn't just grow in numbers but also in the supply of content produced in Ibero-America for the US Hispanic market. The main SVOD platforms are: Netflix, Prime Video (Amazon), HBOMax (Warner Media), Disney+, Star+ (Disney), Hulu (Disney/NBCU-Comcast), Paramount+, Showtime (Paramount Global/National Amusement), Peacock (NBCU/Comcast), AppleTV+, YouTube Premium (Google/Alphabet), Starz (Lionsgate), AMC+ (AMC), Sling TV (DishNetwork) among the most prominent. In this year, Univision's platform PrendeTV was transformed into Vix and Vix+ from the merger of TelevisaUnivision. Vix+ buys the Pantaya platform and Vix becomes the platform with the largest content offer in Spanish in the world.

1.3. Financing sources in the audiovisual sector

Starting in 2022, TelevisaUnivision reports gross earnings in the United States and Mexico jointly. In this sense, according to the report for the fourth quarter of 2022 by TelevisaUnivision, the value of the television market expanded both in Mexico and in the United States by around 60%. TelevisaUnivision's revenue grew 13% to \$4.7 billion dollars, reflecting a \$4 million gain that erases the losses that occurred in the field of streaming services. If we're only referring to the United States market, the corporation had a total net income of \$3,193 billion dollars in 2022, 12% above the \$2,814 billion in 2021. Of these amounts, what corresponds to advertising, the profit in 2022 was \$1,797 billion, 10% above the \$1,627 billion in 2021. For the line of subscription and programming licenses of \$1,360 billion dollars, 22% above the \$1,112 of 2021. In the category of "Other" the corporation reported an income of \$36 billion dollars (TelevisaUnivision, Q4 2022).

Comcast, the corporation that owns NBC-U/Telemundo, had gross revenues of \$30,552 billion in 2022, which represents only a 0.7% increase from the \$30,336 billion in 2021. Of these, revenues in the media segment of NBC-Universal/Telemundo in 2022 were \$23,4 billion dollars, which represents a 2.7% increase from 2021, mainly due to the increase in distribution revenues and advertising revenues. Revenues contemplate \$2.5 billion dollars in losses during the year due to the growth of the Peacock platform (Comcast, 4Q 2022).

Innovate Corp., the company that owned Azteca America, had a revenue of \$1,637 million dollars in 2022, a 36% increase from the \$1,205 million in 2021. However, the company reports that, in 2022, the Azteca America network had a decrease in revenue from advertising and a decrease in programming payments (Innovate, 4Q, 2022).

1.4. Communication Politics (*laws, reforms, incentives, digital TV, etc.*)

The laws that have governed the ownership status of broadcast media in the United States since 1934, have been contemplated in Section 310 of the Communications Act, which specified that foreigners and/or foreign entities could not have more than 25% of ownership or shares in radio or broadcast television stations. However, in the last ten years, the Federal Communications Commission (FCC) opened the possibility of evaluating cases of foreign ownership of broadcast stations in the US on a case-by-case basis based on the idea of broadcasting as a public good and, in this field, television stations that serve social minorities have been considered in this exemption. Under this premise, in 2017, the FCC approved the increase in the ownership of Televisa shares in Univision by up to 45%. In 2022, at the time of the merger, Televisa had a 35% ownership of Univision and, in the merger process, the Mexican corporation increased its shares to 45%, becoming the largest shareholder of the new TelevisaUnivision corporation.

1.5. Digital and mobile connectivity infrastructure

The penetration of Internet services in the world reaches half of the population, but there are national markets that are approaching 100% Internet penetration. The United States has 311 million people accessing the Internet, the third largest market in the world, which means that 92% of the population has some type of access to Internet services. A *Statista* report points out that, thanks to the use of Apps, Internet use has moved mainly to mobile connectivity, so that more than 50% of traffic occurs on mobile devices (Petrosyan, 2022).

2. Analysis of the year: national and Ibero-American fiction premieres on open TV

The creation of the binational Mexican American corporation TelevisaUnivision presents an exceptional case in the Obitel sphere. Although US corporations already own television networks in Latin America such as Argentina's *Telefe* or Chilevisión, both owned by the US conglomerate Paramount, the production of these networks is mostly driven by the local/national market since Paramount does not have a Spanish-language network in the USA in order to create a strong bond between both local markets. The case of TelevisaUnivision is very different, since the production of Televisa Mexico has been the backbone of the Univision network. Televisa's participation as a minority shareholder in Univision historically has been linked to programming agreements that have sustained the programming block, particularly in prime time. The Mexican market and the US Hispanic market have been tied by the production that is made in Mexico for the United States. Although

the merger establishes a stronger binational ownership landscape, the production dynamic continues a logic similar to what it has had for decades.

**TABLE 1. Premiered fictions broadcast in 2022
(national, foreign from the Obitel sphere, and co-productions)**

NATIONAL ORIGINAL TITLES -8	
Telemundo	16. <i>La Desalmada</i> (telenovela, Mexico)*
1. <i>Diálogo de un Gigolo</i> (miniseries)	17. <i>La Herencia</i> (telenovela, Mexico)*
2. <i>Malverde: El Santo Patrón</i> (telenovela)	18. <i>La Madrastra</i> (telenovela, Mexico)*
	19. <i>La Mexicana y el Güero</i> (telenovela, Mexico)*
3. <i>Pasión de Gavilanes 2</i> (telenovela)	20. <i>Los Ricos también Lloran</i> (telenovela, USA-Mexico)**
4. <i>La Reina del Sur 3</i> (telenovela)	21. <i>Mi Camino es Amarte</i> (telenovela, Mexico)*
5. <i>Parientes a la Fuerza</i> (telenovela, USA-Colombia)	22. <i>Mi Fortuna es Amarte</i> (telenovela, Mexico)*
6. <i>El Secreto de la Familia Greco</i> (Series, USA-Argentina)	23. <i>Mujer de Nadie</i> (telenovela, Mexico)*
	24. <i>Perdiendo el Juicio</i> (Series/Sitcom, Mexico)*
Univision	25. <i>¿Qué le Pasa a mi Familia?</i> (telenovela, Mexico)*
7. <i>Amor en Navidad</i> (miniseries, USA-Mexico)	26. <i>Renta Congelada</i> (Series/Sitcom, Mexico)*
8. <i>Se Rentan Cuartos</i> (Series/Sitcom, USA-Mexico)	27. <i>La Rosa de Guadalupe</i> (unitary, Mexico)*
	28. <i>S.O.S. Me Estoy Enamorando</i> (telenovela, Mexico)*
ORIGINAL FOREIGN TITLES -27	29. <i>Soltero con Hijas</i> (telenovela)*
Telemundo	30. <i>¿Tu Qué Crees?</i> (Series/Sitcom, Mexico)*
9. <i>Hasta que la Plata nos Separe</i> (telenovela, Colombia)	31. <i>Ultimo Rey: Hijo del Pueblo 1 y 2</i> (telenovela, Mexico)*
	32. <i>Una Familia de Diez</i> (Series/Sitcom, Mexico)*
UniMás	33. <i>Vecinos</i> (Series/Sitcom, Mexico)*
10. <i>Esta Historia me Suena</i> (unitario, Mexico)*	34. <i>Vencer el Pasado</i> (telenovela, Mexico)*
	35. <i>Vencer la Ausencia</i> (telenovela, Mexico)*
Univision	
11. <i>Albertano Contra los Monstruos</i> (Series/Comedy, Mexico)*	
12. <i>Amor Dividido</i> (telenovela, Mexico)*	
	OBITEL ORIGINAL CO-PRODUCTIONS
13. <i>Como Dice el Dicho</i> (unitario, Mexico)*	Telemundo
14. <i>Contigo Sí</i> (telenovela, Mexico)*	1. <i>La Reina del Sur 3</i> (telenovela – Netflix-Telemundo, USA)
15. <i>Corazón Guerrero</i> (telenovela, Mexico)*	
	ORIGINAL TITLES TOTAL: 35

Source: Nielsen - Obitel USA.

* Titles from TelevisaUnivision a binational corporation (Mexico-USA)
** Titles from W Studios a binational production house with address in Mexico City and Miami.

This year, as the table shows, eight national titles and 27 Obitel titles were released. In this edition, we are including the sitcom and comedy formats as fiction formats, which meant six premiere titles from Obitel countries. Nevertheless, the releases show that production and release capacity do not seem to be returning to the same levels as in the years prior to the pandemic (Covid-19). The amount of titles that were released in 2019 was 45, however, by 2022, the number of titles, without counting the inclusion of comedy titles, was only 29. This number of titles is the result of the reduction caused by the pandemic, giving us 28 in 2020 and only 24 in 2021.

Another very important factor in the decrease of premiere titles has been the premiere of Turkish fiction series. The success in ratings that Turkish tv series have brought to Telemundo in prime times has been at the expense of Telemundo's national production. Given that the Telemundo network is the main national fiction television producer, the inclusion of Turkish tv series has resulted in a significant decrease in national production.

TABLE 1b. Exhibition of rerun titles during 2022
(national, foreign from the Obitel sphere, and co-productions)

NATIONAL RERUNS TITLES - 11	
Telemundo	
1. <i>Bajo el Mismo Cielo</i> (telenovela, USA.)	29. <i>Papá a Toda Madre</i> (telenovela, Mexico)
2. <i>El Chema</i> (telenovela, USA-Mexico)	30. <i>Piel de Otoño</i> (telenovela, Mexico)
3. <i>Decisiones</i> (unitario, Colombia)	31. <i>Porque el Amor Manda</i> (telenovela, Mexico)
4. <i>La Doña</i> (telenovela, USA-Mexico)	32. <i>Que te Perdone Dios</i> (telenovela, Mexico)
5. <i>Enemigo Íntimo</i> (telenovela, USA-Mexico)	33. <i>Rebelde</i> (telenovela, Mexico)
6. <i>La Reina del Sur 2</i> (telenovela, USA-Mexico)	34. <i>Rubí</i> (telenovela, Mexico)
7. <i>Secreto de Selenia</i> (series, USA)	35. <i>Teresa</i> (telenovela, Mexico)
8. <i>Señora Acero</i> (telenovela, USA-Mexico)	36. <i>Tres Veces Ana</i> (telenovela, Mexico)
9. <i>Sin Senos no Hay Paraíso</i> (telenovela, USA-Colombia)	37. <i>Triunfo del Amor</i> (telenovela, Mexico)
	38. <i>Vivan los Niños</i> (telenovela, Mexico)
UniMás	
10. <i>Dani Who?</i> (series, USA)	
Azteca America	
11. <i>Eva Luna</i> (telenovela, USA)	
FOREIGN REPLACEMENT TITLES – 46	
UniMás	
12. <i>Amar a Muerte</i> (telenovela, Mexico)	Univision
13. <i>Amores con Trampa</i> (telenovela, Mexico)	39. <i>Como Dice el Dicho</i> (unitario, Mexico)
14. <i>La C.Q.</i> (series, Mexico-Venezuela)	40. <i>Fuerza de Creer</i> (series, Mexico)
15. <i>Como Dice el Dicho</i> (unitario, Mexico)	41. <i>Heridas del Amor</i> (telenovela, Mexico)
16. <i>Cómplices al Rescate</i> (series, Mexico)	42. <i>Peregrina</i> (telenovela, Mexico)
17. <i>Cuna de Lobos</i> (telenovela, Mexico)	43. <i>La Familia P. Luche</i> (Series/Sitcom, Mexico)
18. <i>Esta Historia me Suenas</i> (unitario, Mexico)	44. <i>Los Gonzales</i> (Series/Sitcom, Mexico)
19. <i>La Fea mas Bella</i> (telenovela, Mexico)	45. <i>La Rosa de Guadalupe</i> (unitario, Mexico)
20. <i>Fuego en la Sangre</i> (telenovela, Mexico)	46. <i>Las Tontas no van al Cielo</i> (telenovelas, Mexico)
21. <i>Fuerza del Destino</i> (telenovela, Mexico)	47. <i>María de los Ángeles</i> (Series/Sitcom, Mexico)
22. <i>Lo que la Vida me Robó</i> (telenovela, Mexico)	48. <i>Nosotros los Guapos</i> (Series/Sitcom, Mexico)
23. <i>Mañana es para Siempre</i> (telenovela, Mexico)	
24. <i>Mi Marido Tiene Familia</i> (telenovela, Mexico)	EstrellaTV
25. <i>Mita y Mita</i> (Series/Sitcom, Mexico)	49. <i>Encrucijada</i> (series, Mexico)
26. <i>Nosotros los Guapos</i> (Series/Sitcom, Mexico)	50. <i>Historias Delirantes</i> (series, Mexico)
27. <i>Una Familia de Diez</i> (Series/Sitcom, Mexico)	
28. <i>Vecinos</i> (Series/Sitcom, Mexico)	Azteca America
	51. <i>Lo que Callamos las Mujeres</i> (unitario, Mexico)
	52. <i>Cielo Rojo</i> (telenovela, Mexico)
	53. <i>Emperatriz</i> (telenovela, Mexico)
	54. <i>Lo Que la Gente Cuenta</i> (unitario, Mexico)
	55. <i>La Loba</i> (telenovela, Mexico)
	56. <i>Mujeres Rompiendo el Silencio</i> (unitario, Mexico)
	57. <i>Mentes Retorcidas</i> (series, Mexico)
REPLACEMENT TITLES TOTAL: 57	

Source: Nielsen - Obitel USA

Reruns titles, like in other years, outperform premiered titles. In 2022, the reruns return to the pre-Covid numbers with 57 rerun titles which, without counting the eight sitcom reruns, the number of titles is equivalent to the 50 reruns that were scheduled in 2019. In relation to the table, it is important to point out that there are titles that appear as rerun, and repeat. In the case of reruns, unitary programs (*unitarios*) play a very important role. These unitary programs are programmed as replacements throughout the day, since there is an archive of hundreds of unitary programs that do not need to be ordered under any temporal logic among them, since they are all self-contained. This feature gives them the flexibility to be programmed any day at any time.

**Table 2. National fiction formats for release in 2022
and their evolution in the five-year period**

Format	Titles						Hours					
	2018	2019	2020	2021	2022	Total	2018	2019	2020	2021	2022	Total
Telenovela	14	8	7	6	4	39	860:20	466:20	342:40	387:00	194:00	2250:20
Series	5	3	1	1	1	11	65:25	33:00	10:00	19:00	6:00	133:25
Miniseries	0	0	0	0	2	2	0:00	0:00	0:00	0:00	11:00	11:00
Sitcom	0	0	0	0	0	0	0:00	0:00	0:00	0:00	0:00	0:00
Unitary	1	1	1	1	0	4	7:00	13:00	14:00	14:00	0:00	48:00
Docudrama	0	0	0	0	0	0	0:00	0:00	0:00	0:00	0:00	0:00
Others	0	0	0	0	1	1	0:00	0:00	0:00	0:00	5:00	5:00
Total	20	12	9	8	8	57	932:45	512:20	366:40	420:00	216:00	2447:45

Source: Nielsen - Obitel USA

In relation to national production, the telenovela continues to be the format preferred by the networks. However, production has dropped dramatically from 14 titles in 2018 to only four titles in 2022. In 2018, the presence of five series-miniseries is also shown, which seemed to indicate a trend, however, in 2022, only three are reported. What once seemed like a possible trend in producing series and miniseries to capture audiences seems to be fading, leaving telenovelas to take their place as the preponderant format. Paradoxically, the increase in production for SVOD platforms seems to present a model of division of labor in relation to the format, where the production of miniseries and series has increased exponentially, but for its consumption on platforms.

Table 3. Premiere fictions released in 2022: Countries of origin

Country	Titles	%	Hours	%
NATIONAL (total)	8	22.9	215:59	13.2
OBITEL COUNTRIES (total)	27	77.1	1421:43	86.8
Argentina	0	0.0	0:00	0.0
Brazil	0	0.0	0:00	0.0
Chile	0	0.0	0:25	0.0
Colombia	1	2.8	27:25	1.7
Ecuador	0	0.0	0:00	0.0
Spain	0	0.0	0:00	0.0
USA. Hispanic	8	22.9	215:59	13.2
Mexico	26	74.3	1394:19	85.1
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 (total)	1	2.9	44:59	2.7
National Co-productions	1	2.9	44:59	2.7
Co-productions Obitel Countries	0	0.0	0:00	0.0
TOTAL	35	100	1637:24	100

Source: Nielsen - Obitel USA.

Regarding the country of origin of the fiction, Mexico continues to occupy its traditional place as the main provider of fiction to the US Hispanic market. The number of hours of Mexican fiction will jump in 2022 to represent 85.1% of the total number of premiere hours on the screen. While the country has always had a majority, even well above national production, the percentage in total premiere hours this year is far above the 62% they represented in 2019, 63% in 2020 and 60% in 2021. Meanwhile, Colombia have kept its position, albeit marginally, as the third fiction supplier behind Mexico and the US Hispanic production.

TABLE 4. National and Obitel fictional formats shown in 2022

Format	Titles				Hours			
	National	%	Rest Obitel	%	National	%	Rest Obitel	%
Telenovela	4	50.0	18	66.7	194:00	90.0	1029:45	72.4
Series	1	12.5	0	0.0	6:00	2.7	0:00	0.0
Miniseries	2	25.5	0	0.0	11:00	5.0	3:00	0.2
Telefilm	0	0.0	0	0.0	0:00	0.0	0:00	0.0
Unitary	0	0.0	3	11.1	0:00	0.0	337:00	23.7
Docudrama	0	0.0	0	0.0	0:00	0.0	0:00	0.0
Other	1	12.5	6	22.2	5:00	2.3	55:00	3.9
Total	8	100	27	100.0	216:00	100	1364:45	100

Source: Nielsen - Obitel USA

The table shows the preponderance of telenovelas in national production, constituting 90% of the premiering hours onscreen. While in the Obitel sphere, telenovelas retain their leadership with 72.4% of screen hours. Here it is important to underline the strategic importance for programming that the unitaries have had. With only three titles, the unitaries constitute almost 25% of the total premiered hours on the Obitel screen. Sitcoms were added in in the “Other” category with a presence in total of screen hours of 2.3% in premiered national production and 4% in Obitel hours.

TABLE 5: 10 Most watched titles in 2022

Title		Network	Producer (Country)	Format/g enre	No. Of episode s in 2022	Time slot	Rating %	Share %
1	<i>La Desalmada</i>	Univision	Televisa Mexico	Telenovela/ Melodrama	10*	Prime time	8.1	26.3
2	<i>Vencer el Pasado</i>	Univision	Televisa Mexico	Telenovela/ Melodrama	35*	Prime time	6.8	18.7
3	<i>Mi Fortuna es Amarte</i>	Univision	Televisa Mexico	Telenovela/ romantic melodrama	94	Prime time	6.1	18.5
4	<i>¿Qué le Pasa a mi Familia?</i>	Univision	Televisa Mexico	Telenovela/ romantic comedy	21 *	Afternoon	5.9	17.1
5	<i>Mi Camino es Amarte</i>	Univision	Televisa Mexico	Telenovela/ romantic melodrama	261	Prime time	5.5	18.5
6	<i>Los Ricos También Lloran</i>	Univision	Televisa/ W Studios USA/Mexico	Telenovela/ romantic melodrama	45	Prime time	5.5	18.2
7	<i>Soltero con Hijas</i>	Univision	Televisa Mexico	Telenovela/ dramedy	84	Prime time	5.4	15.2
8	<i>Vencer La Ausencia</i>	Univision	Televisa Mexico	Telenovela/ melodrama	38	Prime time	5.2	17.1
9	<i>La Herencia, Legado de Amor</i>	Univision	Televisa Mexico	Telenovela/ romantic melodrama	69	Prime time	5.1	16.8
10	<i>La Madrastra</i>	Univision	Televisa Mexico	Telenovela/ romantic melodrama	41	Prime time	4.8	18.9
Total of national productions: 0				Original foreign scripts: 10				
0%				100%				

Source: Nielsen - Obitel USA

(*): Its broadcast began in 2021 and continued in 2022.

The telenovelas *La Desalmada* was the first place again, repeating the same position that held in 2021. *Vencer el Pasado*, in second place and *¿Qué le pasa a mi Familia?* in fourth. These three titles premiered in 2021 and that saw their end at the beginning of 2022. Although it could be argued that it was the fact that these three fictions only saw their conclusion in 2022, it is important to underscore that the three were placed among the ten most viewed from the previous year. It should be noted that the “*Vencer*” brand has consistently placed its telenovelas among the ten most watched. In 2022, *Vencer el Pasado* and *Vencer la Ausencia* ranked second and eighth, respectively. In 2021, *Vencer el Desamor* and *Vencer el Pasado* ranked second and fourth respectively. In 2020, *Vencer el Desamor* ranked sixth. As on previous occasions with *Cuna de Lobos* or *Rubí*, Televisa’s *La Fábrica de Sueños* and W Studios, which produces, in short versions, telenovelas that have enjoyed iconic status in the history of Mexican telenovelas, placed two fictions among the top ten places: *Los Ricos También Lloran* in the sixth and *La Madrastra* in the tenth. We must point out that Turkish tv series continue to deliver ratings successes, but on this occasion only the Turkish tv series *La Madre* ranked third among the ten most watched in 2022. This inclusion would take *La Madrastra* out of tenth place and would move it to twelfth place, since the eleventh place was occupied by *Hercai: Amor y Venganza*, a Turkish tv series broadcast by Telemundo.

TABLE 5a: 10 Most Watched National Titles

Title		Network	Producer (Country)	Format/genre	Number of episodes in 2022	Time slot	Ratings	Share
1	<i>La Reina del Sur 3</i>	Telemundo	Telemundo/Netflix	Telenovela /narco/drama	45	Prime time	3.9	12.7
2	<i>Malverde: El Santo Patrón</i>	Telemundo	Telemundo Studios	Telenovela /Period drama	21	Prime time	3.5	11.5
3	<i>Pasión de Gavilanes 2</i>	Telemundo	Telemundo/CMO Producciones	Telenovela /romantic melodrama	71	Prime time	3.1	12.6
4	<i>Se Rentan Cuartos</i>	Univision	Viacom CBS	Series/Sitcom	10	Prime time	1.5	6.6
5	<i>Parientes a la Fuerza</i>	Telemundo	Telemundo	Telenovela /romantic comedy	57	Prime time	1.3	8.7
6	<i>Amor en Navidad</i>	Univision	Lifetime Vip2000TV Yahayra Films	Miniseries/ Drama	3	Tarde	1.6	6.0
7	<i>El Diario de un Gigolo</i>	Telemundo	Telemundo/ Underground	Miniseries/ Drama	10	Prime time	1.5/0.3	6.1/4
8	<i>El Secreto de la Familia Greco</i>	Telemundo	Telemundo/ Underground	Series/Drama	5	Prime time	0.8	6.7
				Original foreign scripts: 6				
				75%				

Source: Nielsen – Obitel USA

(*): Its broadcast began in 2021 and continued in 2022

Even though the narco telenovela offering is still the main rating strategy from Tele-mundo, the absence of *El Señor de los Cielos* on the screen seems to have had a nega-tive effect on ratings. The great bet of the Telemundo network in the narco subgenre was *La Reina del Sur* in its third season and *Malverde: El Santo Patrón*. Both produc-tions became the most successful titles of the network which ranked first and second in the national production rating. However, in the context of the general table (T.5) none of them was able to make it into the table of the ten most viewed and were only able to occupy the 14th and 15th places respectively.

TABLE 6: Audience profile of the 10 most viewed titles: gender and age

Title		Network	Gender %	
			Women	Men
1	<i>La Desalmada</i>	Univision	62	38
2	<i>Vencer el Pasado</i>	Univision	64	36
3	<i>Mi Fortuna es Amarte</i>	Univision	63	37
4	<i>¿Qué le Pasa a mi Familia?</i>	Univision	62	38
5	<i>Mi Camino es Amarte</i>	Univision	64	36
6	<i>Los Ricos También Lloran</i>	Univision	63	37
7	<i>Soltero con Hijas</i>	Univision	63	37
8	<i>Vencer La Ausencia</i>	Univision	62	38
9	<i>La Herencia, Legado de Amor</i>	Univision	62	38
10	<i>La Madrastra</i>	Univision	64	36

Title		Age %						
		2-11	12-17	18-24	25-34	35-49	50 -54	55-+
1	<i>La Desalmada</i>	10	5	6	8	28	8	35
2	<i>Vencer el Pasado</i>	8	5	5	9	27	8	38
3	<i>Mi Fortuna es Amarte</i>	9	4	6	9	20	9	44
4	<i>¿Qué le Pasa a mi Familia?</i>	9	5	5	10	24	7	40
5	<i>Mi Camino es Amarte</i>	9	4	6	9	20	9	44
6	<i>Los Ricos También Lloran</i>	8	5	6	10	22	7	42
7	<i>Soltero con Hijas</i>	9	5	5	11	24	8	37
8	<i>Vencer La Ausencia</i>	7	5	6	9	23	8	41
9	<i>La Herencia, Legado de Amor</i>	9	4	6	12	21	7	40
10	<i>La Madrastra</i>	8	5	6	10	22	9	39

Source: Nielsen OBITEL USA.

The fictions with the highest ratings on public broadcast television are based mainly on female audiences with a demo segment that is not young. For example, in terms of gender, among the most watched fictions, at least 62% were female audiences, while in terms of age, 71% were at least 35 years old and almost half of the entire audience was 50 years old with a 48% of the total.

3. VoD Monitoring 2022

3.1 VoD market in 2022

The year 2022 will be the one in which almost all SVOD platforms in the United States established a production strategy from Ibero-America, following in the footsteps of what Netflix started in 2015. In 2022, Netflix, Prime Video, HBOMax, Paramount+, Disney+, Star+ (Hulu, Disney), Lionsgate+ (Starz) have productions made in Latin America that are used to satisfy the demand for content of the Spanish-speaking population in the United States. For its part, one of the most important reasons for the TelevisaUnivision merger is reflected in the production of original content through its Vix+ platform, which was also enhanced by their purchase of Pantaya, another emerging SVOD service, and thereby consolidating its catalogue.

Netflix is the platform with the most subscribers with 230.7 million globally, with 74.2 million in the domestic market, which includes the United States and Canada, and 41.6 million in the Ibero-America market. Netflix generated a gross income of \$31.6 billion dollars in 2022, which represented an increase of 6.7% compared to 2021. And it had a net profit of \$4.4 billion, which meant a reduction of 12.2% compared to the previous year (Iqbal, 2023). However, Netflix began to lose millions of its subscribers in the context of a much more competitive landscape, but also due to its implementation of policies that tried to stop the common practice of sharing an account among several users (Goldman, 2023).

In the second place in terms of subscriber count is Amazon Prime Video with 220 million, followed by Disney+ with 137 million, HBOMax with 81.2 million, Hulu (Disney) with 45 million, and AppleTV+ with 20 million (Knight, 2023). For its part, the free Vix service, which is already considered the largest Spanish-speaking streaming service in the world, reached 25 million subscribers, in its ad-based version (Vlessing, 2023).

In 2022, revenue from SVOD services was \$80 billion; this amount is above the \$73 billion from 2021 (Knight, 2023).

3.2. Content offer from local VoD platforms in 2022 (national, regional within the country)

Spanish production for the Latino market in the United States has shifted from national to regional. Now, the platforms produce in Spanish in Ibero-America knowing that their products will not only have an impact on the domestic market where it is produced, whether it is Colombia, Spain or Mexico, but also a possible regional and global impact, but very particularly, they become the key part of the content catalogue for the Spanish-speaking population in the United States.

The premiere of seven original series on Vix+ (that have high production values, and that are dramas or thrillers that show a step-in innovation) aims to position the

platform as a serious global competitor for Hispanic audiences. In addition to the original series, the platform offers access to a large archive of fictional content with telenovelas, series, and unitaries, many of which had been highly successful in the past. The table shows three Pantaya titles released before being acquired by Vix, but, starting in the middle of the year, its new releases become the property of Vix.

3.3. VoD analysis in 2022: New national fictions and co-productions

In 2022, the platforms reached a total of 72 titles of original US productions aimed at the Latin American and Ibero-American audience. The main platforms in the United States find very little incentive to produce original series in Spanish for the domestic market. These platforms have shifted their strategy to production in different Ibero-American countries, with productions that will feed their content offer for the Spanish-speaking market in the United States. Only in cases in which a Spanish-language television channel is involved and ensures its massive distribution, as was the case of the co-production of Netflix with Univision with the three seasons of *El Chapo* (2017 and 2018), or Netflix and Telemundo with *La Reina del Sur* 2 and 3 (2019 and 2022), these services do not produce in the United States in Spanish but do so in the region. This explains what is described in the table as “co-production” which is nothing more than US production for its commissioned platforms with different production houses in Ibero America.

TABLE 7. National fictions and co-productions released in 2022 through VoD services

NEW NATIONAL SHOWS	NEW LATIN AMERICAN USA PRODUCTIONS
HBOMax – N° 1 national titles 1. <i>Gordita Chronicles</i> (comedy series) Hulu – N° 1 national titles 2. <i>This Fool</i> (comedy series) AppleTV+ – N° 1 national titles 3. <i>Now and Then</i> (thriller series) Peacock (Telemundo, TL Plus) N° 1 national titles 4. <i>Armas de Mujer</i> (dramedy series)	Netflix – N° 20 titles 1. <i>Cielo Grande</i> (musical series / Argentina) 2. <i>Pálpito</i> (thriller series / Colombia) 3. <i>Goles en Contra</i> (drama series / Colombia) 4. <i>Bienvenidos al Edén</i> (thriller series / Spain) 5. <i>Tu no Eres Especial</i> (fantasy comedy series / Spain) 6. <i>Sagrada Familia</i> (thriller series / Spain) 7. <i>Si lo Hubiera Sabido</i> (drama series / Spain) 8. <i>Smilye</i> (romantic drama series / Spain) 9. <i>La Flor más Bella</i> (comedy series / Spain) 10. <i>Machos Alfa</i> (comedy series / Spain) 11. <i>Elite 5</i> (drama series / Spain) 12. <i>Elite 6</i> (drama series / Spain) 13. <i>Las de la Última Fila</i> (dramedy series / Spain) 14. <i>Santo</i> (thriller series / Brazil-Spain) 15. <i>Contigo Capitán</i> (biopic series / Peru) 16. <i>Belascoarán, PI</i> (thriller miniseries / Mexico) 17. <i>El Secreto de la Familia Greco</i> (drama series / Mexico) 18. <i>¿Quién Mató a Sarah?</i> 3 (drama series / Mexico) 19. <i>Oscuro Deseo 2</i> (drama series / Mexico) 20. <i>Donde Hubo Fuego</i> (telenovela / Mexico) Amazon Prime Video N° 11 titles 21. <i>Porno y Helado</i> (comedy series / Argentina) 22. <i>Iosi: El Espía Arrepentido</i> (suspense series / Argentina) 23. <i>Supernova</i> (dramedy series / Argentina) 24. <i>El Fin del Amor</i> (drama series / Argentina) 25. <i>El Presidente 2</i> (sport drama series / Chile) 26. <i>Noticia de un Secuestro</i> (drama miniseries / Colombia) 27. <i>Cochina Envidia</i> (dramedy series / Colombia) 28. <i>A Grito Herido</i> (musical series / Colombia) 29. <i>Sin Límites</i> (historical drama miniseries / Spain) 30. <i>Un Asunto Privado</i> (period drama series / Spain) 31. <i>Días Mejores</i> (dramedy series / Spain) HBOMax N° 4 titles 32. <i>El Valle Olvidado</i> (suspense series / Brazil) 33. <i>La Magia de Luna</i> (romantic comedy series / Brazil) 34. <i>¡García!</i> (thriller series / Spain) 35. <i>Los Espookys 2</i> (comedy series / Mexico) Paramount+ N° 2 titles 36. <i>Las Seguidoras</i> (comedy thriller series / Brazil) 37. <i>Bosé</i> (biopic miniseries / Spain) Disney+ N° 5 titles 38. <i>Tierra Incógnita</i> (mystery drama series / Argentina) 39. <i>El Coro: Éxito Aquí Vengo</i> (drama series / Brazil) 40. <i>Todo Igual.. SGN</i> (comedy drama series / Brazil)
CO-PRODUCTIONS Netflix – N° 1 national titles 5. <i>La Reina del Sur 3</i>(telenovela narco thriller, Telemundo/Netflix)	

	41. <i>Siempre Fui Yo</i> (mystery drama series / Colombia) 42. <i>Papás por Encargo</i> (dramedy series / Mexico) Star+ (Hulu/Disney) N° 12 titles 43. <i>El Encargado</i> (comedy series / Argentina) 44. <i>Limbo</i> (drama series / Argentina) 45. <i>Santa Evita</i> (biopic series/ Argentina) 46. <i>Robo Mundial</i> (comedy series / Argentina) 47. <i>Terapia Alternativa</i> (dramedy series / Argentina) 48. <i>No Fue Mi Culpa</i> (drama series / Brazil) 49. <i>Locura</i> (thriller series / Brazil) 50. <i>No Fue Mi Culpa</i> (drama series / Colombia) 51. <i>La Última</i> (musical series / Spain) 52. <i>El Galán. La TV Cambio, el No</i> (dramedy series / Mexico) 53. <i>El Repatriado</i> (drama series / Mexico) 54. <i>No Fue Mi Culpa</i> (drama series / Mexico) Lionsgate+ Starz N° 2 titles 55. <i>Express</i> (thriller series / Spain) 56. <i>Señorita 90</i> (drama series / Mexico) Vix+ N° 7 titles 57. <i>La Mujer del Diablo</i> (drama series / Mexico) 58. <i>María Felix: La Doña</i> (biopic miniseries / Mexico) 59. <i>Marea Alta</i> (thriller series / Mexico) 60. <i>Mujeres Asesinas</i> (anthology series / Mexico) 61. <i>La Rebelión</i> (drama series - Mexico) 62. <i>Travesuras de la Niña Mala</i> (drama series / Mexico) 63. <i>Sobreviviendo a los 30s</i> (drama series - Mexico) Pantaya N° 3 titles 64. <i>El Refugio</i> (sci-fi thriller series / Chile-Mexico) 65. <i>Toda la Sangre</i> (drama series / Mexico) 66. <i>Líos de Familia</i> (comedy series / Dominican Republic) Canela N° 1 titles 67. <i>Bocetos</i> (teen series / Mexico) Subtotal: 67 Total: 72
Subtotal: 5	

Source: Obitel USA.

Titles produced in Mexico lead the US production list for platforms with 20 titles, closely followed by Spain with 17, Argentina with 11, Brazil with eight, Colombia with seven, Chile with two, and Peru and the Dominican Republic with one title respectively.

3.4. VoD Narrative characteristics in 2022

The offer of the platforms underlines the absence of fictional production with large number of episodes, as in the case of the production of telenovelas, but they are co-produced by a streaming platform only when a television network is involved. The outlier this year was *Donde Hubo Fuego* a short telenovela (39 chapters) which is a

coproduction of Netflix and Argos. This is important because it is the first time that a telenovela is produced for a SVOD platform without the involvement of a television network, which is quite interesting development, due to the persistent success of telenovelas within the Netflix catalogue. Besides the former, all the productions are series (dramas or comedies). Vix's proposal clearly highlights the short-form series as the preferred one, but also dramas and thrillers are basically 100% of the platform's offer. The commitment to the biopic series about one of the most important divas in the history of Mexican cinema, *María Félix: La Doña*, was very important. The premiere of the series created an expectation that recalls the strategy that has been followed with the cases of bio-series such as *Luis Miguel* or *Selena* on Netflix, but also strategies followed by other channels such as the life of Juan Gabriel with the series *Hasta que te Conocí* or *El Chapo* from Univision and Netflix.

4. Fiction, interactivity, and audience participation

On Telemundo's 2021-2022 season UpFront, the network announced the production of the second season of its 2000s hit *Pasión de Gavilanes*. The announcement comes in the context of the imminent premiere of the remake of another iconic Colombian telenovela: *Café con Aroma de Mujer*, this time starring William Levy. In the context of a war for ratings, Telemundo seems to be somehow emulating Televisa's strategy with its "Factory of Dreams" and the production of iconic telenovelas in Mexico, Telemundo is going to bet on programming and/or producing fiction betting both on nostalgia as well as success certainty. In 2022, a whole series of conversations in relation to the premiere of the second season of *Pasión de Gavilanes* will take place, in the same way that the premiere of the remake of *Café con Aroma de Mujer* did in 2021.

4.1. Social Interactivity

The first communications from the network published on Telemundo's institutional website (www.telemundo.com) underscore how important this production is with statements such as: '[Pasión de Gavilanes](#)', one of the best Colombian soap operas, or "the iconic series" which narrates the passionate but tumultuous lives of the Reyes family... ensuring that "the original cast will be part of this new adventure" (Telemundo, 2022, Feb. 4). The network's strategy to highlight the premiere underlines the legendary character of this fiction, adding the promise of seeing the original cast, and appealing to the power of nostalgia. To create a sense of expectation in a younger audience, Telemundo underlined the successful trajectory of the new generation of young talent who are now joining the cast of this fiction in the roles of the children of the Reyes. Thus, the Telemundo newsletter points to Bernardo Flores, one of the most promising actors of his generation (Telemundo, 2021 Oct. 18th), and

the successful projects of Juan Restrepo, as brother and son of Juan Reyes and Norma Elizondo. The network promotes Telemundo's app for full episodes with which you can access the telenovela, but it also promotes a page that Telemundo has created specifically for '[Pasión de Gavilanes 2](#)' so that audiences can access the episodes, summaries, comments and behind the scenes (Telemundo, 2022, Feb. 4). To prepare audiences for the premiere of the sequel to its legendary telenovela, the network decided to include the original telenovela *Pasión de Gavilanes* in its programming starting in 2021. Almost 20 years later, the rerun was to be able to establish or remember the connection with the narrative of its continuation in the new production to be released in 2022.

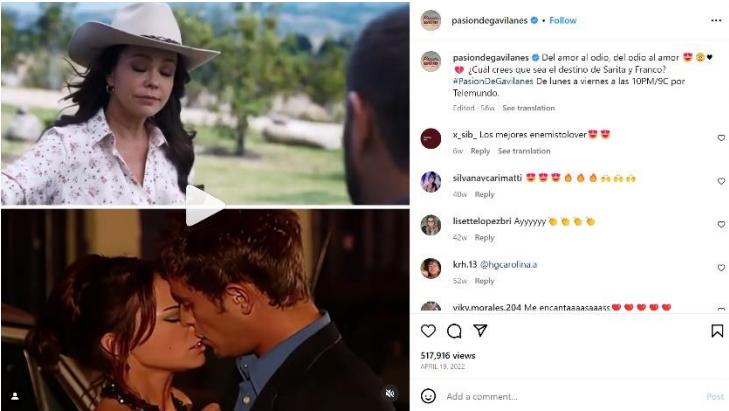
4.2. Social Participation

Paradoxically, the rerun of the original season of *Pasión de Gavilanes* as a preamble generated highly contradictory conversations. Initially, the 2021 rerun of the original telenovela sparked conversations on social media about how representation in terms of gender and sexual orientation felt dated, in what many saw as a narrative that hadn't aged well. Audiences in 2021 generated conversations in which gender dynamics in the telenovela, in relation to what means to be masculine and feminine, were read as outdated or sexist. In contrast, in the second season, the audience reacted, in some cases, to some progressive narrative lives, by rejecting the subplot of a gay couple where Sarita's son is included.

Audience reactions and conversations were reflected in the traffic and use of the "*Pasión de Gavilanes* la Nueva Temporada" page created by Telemundo. This page with the hashtag #PasionDeGavilanes has 731,000 followers, with 309 videos posted. On this Instagram page there is also a link to the NBC portal to see the episodes of the first season (telemundo.app.link/WatchPasionDeGavilanes). The massive audience response to the first posts on the portal reflects the expectation created by the network. The post with the most reaction of the entire season, with almost a million views (943,943) and almost 137,000 "likes", was uploaded on October 18th, four months before the telenovela premiered. The post confirms that the original cast will participate in the telenovela and offers a preview. The other three posts to which the audience gave the most views and the most "likes" were also published before the premiere on the same date mentioned with almost 994 thousand views and 137 thousand "likes", followed by the post on January 19th, 2022 with 924 thousand views and 109 thousand "likes", and one more published on December 12th, 2021 with 853 thousand views and 151 thousand "likes." The expectation originated an important response. However, this level of response was not reflected during the telenovela's broadcast. Apparently, after the premiere of the telenovela, enthusiasm waned, which was also reflected in the ratings. The telenovela's performance in terms of ratings fell short of expectations, which according to audience discussions led the network to

reduce the story from 90 to just 73 episodes. Franco’s very late appearance in the story produced unexpected effects. On the one hand, waiting for him to enter the plot created an expectation, and somehow a rebuke to the network for his absence. On the other hand, his appearance and the perceived chemistry between Sarita and Franco, as well as their love story, exploded into rather late enthusiasm for the story. This was reflected in the type of conversations that these two characters provoked, and it could be measured by the number of views and likes that the posts referring to this couple gave to the site. The initial enthusiasm with the pre-release posts cooled down and it wasn’t until well after the first half of the story that enthusiasm reignited around this couple, as the posts confirm. This couple received the highest number of views and conversations in a regular basis, as evidenced by the post on March 30th, with a conversation between Michael Brown and Natasha Klauss, the actors who play Franco and Sarita, with 436,000 views and 75,000 “likes.”; followed by the post on April 19th, 2022 that says “From love to hate, from hate to love 😍😞❤️💔 What do you think is the fate of Sarita and Franco? [#PasionDeGavilanes](#)” with 518,000 views and 64,000 “likes”; and concluding with a post from May 18th, 2023 with more than 500 thousand views that says: “Franco does not suspect the danger that his family is in. What will he do when he finds out? Share how you think the characters of [#PasionDeGavilanes](#)” will end their journeys,” with 508,000 visits and 37,000 “likes”.

“From love to hate, from hate to love 😍😞❤️💔 What do you think is the fate of Sarita and Franco? [#PasionDeGavilanes](#) Monday to Friday at 10PM/9C in Tele-mundo.”



517,916 views
64,378 likes
APRIL 19, 2022

The expectation of the entry of Franco Reyes, generated conversations where the audiences show their anger at the very late integration into the narrative of the character

played by the Argentine Michael Brown. On the other hand, the arrival of Franco generated a series of conversations about his reunion with Sarita, making them the couple with the most traction in the telenovela through the conversations in the hashtag #LoBuenoLlegaTardeSYF #saritayfranco. As a result of the long wait and the chemistry that the two characters presented on screen their fans asked Netflix, through their posts, to make a fiction in which the two were protagonists through #ProtagonicoKlaussYBrown.

@DaniElHuracan | STOP THE WORLD. Franco is heeeeeeeere... After 58 episodes, just to show that he's been kidnapped and enslaved this whole time??? WHY DO THEY PLAY WITH ME LIKE THIS? ;-; #PasionDeGavilanes #PasionDeGavilanes2

Original Tweet:

@DaniElHuracan | PAREN EL MUNDO. Franco apareceeeee... Después de 58 capítulos, sólo para demostrar que todo este tiempo estuvo secuestrado y esclavizado??? PORQUÉ JUEGAN ASÍ CONMIGO? ;-; #PasionDeGavilanes2 #PasionDeGavilanes



@spampithinker | May 23, 2022 | CAN'T HANDLE THIS I WAS THINKING THAT SHE WAS GOING TO REJECT HIM AND SHE TAKES HIS HANDS AND PUTS THEM ON HER LITTLE FACE TO CONFIRM THAT HE'S REAL MYYYYY GOOOOOODDDDD #GoodThingsArriveLateSYF #PasionDeGavilanes2

Original Tweet:

@spampithinker | May 23, 2022 | NO PUEDO MAS YO PENSANDO QUE ELLA LO IBA A RECHAZAR Y LLEVA LAS MANOS DE EL A SU CARITA PARA COMPROBAR SI ES REAL DIOOS MIOOOOOOOOO #LoBuenoLlegaTardeSYF #PasionDeGavilanes2



5. Highlights of the Year

The most significant event of 2022 was the consolidation of the TelevisaUnivision merger and its new production strategy from the launch of the premium version of Vix, as Vix+, which debuted on July 21st. The original production for this premium Vix+ service represents the most important effort of a Spanish-language platform for a global market. The growth of Vix has been so significant that by May 2023, Pierluigi Gazzolo, CEO of ViX, announced that: “Consumption on the platform continues to grow rapidly: 80% of consumption on ViX is content that no one else has and, more importantly, 63% of ViX users are incremental to the massive audience we serve on linear” (Ramos-Weiner, 2023).

For its part, Telemundo opens its studios in Mexico City with Telemundo Global Studios for the production of the eighth season of *El Señor de los Cielos*. The growth of Telemundo’s production with studios in Mexico, accompanied by the growing

production of platforms such as Netflix, Prime Video, Disney+, Paramount+, HBO-Max and now Vix+ also reinforces Mexico City's position as a national, regional and global fiction production site.

Nostalgia through remakes, or a new season of a successful fiction title continues to be at the center of the original fiction production for prime time. The remakes of *Los Ricos También Lloran* and *La Madrastra* premiered on Univision as part of Televisa's *La Fábrica de Sueños* brand and achieved a special place in the network's success. Also, within a strategy for success certainty, Televisa continues with its "Vencer" brand with the productions *Vencer el Pasado* and *Vencer la Ausencia*. For its part, Telemundo resorts to nostalgia with the production of the second season of *Pasión de Gavilanes* and the return of *La Reina del Sur* in its third season. In terms of programming, Telemundo continues with its strategy of double finales with the end of *Exatlón* and *Hercai Amor y Venganza* on Monday, May 9th. And the strategy of double premieres with the premiere of *La Casa de los Famosos* and *Hasta que la Plata Nos Separe* on May 10th, 2022.

The most important television event was the World Cup for which NBC had the broadcasting rights; with the matches and coverage, Telemundo.com and Peacock dominated the streaming during the sporting event in Qatar (Nov. 23). In fact, the Mexico vs. Argentina game broadcast by Telemundo became NBC's most watched game with 8.9 million cumulative viewers and probably the most successful Spanish-language broadcast of the year (Nov. 28). For its part, Univision successfully offered the *Final de Liga MX*, UEFA Champions League.

6. Theme of the year: The internationalization of independent production houses

In the context of production for national television networks in Spanish, the internationalization of independent houses has been characterized by the close linguistic and cultural relationship of the USA Hispanic population with Latin America. Although Miami has functioned as the most important center where networks carry out their production in Spanish in the United States, production in Latin America has played a key role for economic, linguistic and cultural reasons. Within the "commission" production strategy used by Hispanic networks in the region, the role of independent production houses has been central. This strategy started in the 1980s in the context of the Telemundo and Univision rivalry, was followed by US Spanish-language cable regional channels and is now being implemented by large conglomerates in their foray into streaming video platforms throughout Latin America.

Independent houses, on the one hand, have become a key player in entering local, national and regional markets through local knowledge of culture, customs, manners, traditions, stories, language and accents that are recognized by both the Ibero-American population, but also for Latino audiences in the United States. On

the other hand, the types of genres, production formats and creative guides established by American corporations (networks, film studios or platforms) recreate a form of storytelling and visual modality that has a global impact and reach. So, these productions are made with the double characteristic of obeying the local or regional Ibero-American markets (including the Hispanic United States) and at the same time ensuring their acceptance with audiences throughout the world.

It should be noted that when we talk about indies or independent production houses, we are referring to those companies dedicated to audiovisual production that have no ownership or financial relationship with the corporations whose business is the distribution of this content. That is to say, these are companies that have no direct link with the distribution of their content, neither in cinema, television nor platforms. Likewise, these indie houses should not be owned or part of any state or government entity. Due to this condition, these indies are usually small or medium in size, with low budgets, and depend on external sources of financing through all kinds of private or state support, donations, scholarships and prizes. However, the scenario of multinational corporations makes the landscape much more complex when they are in international markets since these work as “indies” for those local markets. For example, the production houses known as TeleColombia and TeleMexico, operating in these countries as production companies for various clients, became The Independent Studios (TIS) which was later renamed Paramount Television International Studios and are owned by Paramount Global. There’s also the case of MediaPro, a subsidiary of the Spanish group Imagina Audiovisual, which has more than 25 production offices or MediaPro representation bureaus around the world, particularly in Argentina, Bolivia, Canada, Cuba, the United States, Mexico, Peru, and Portugal. Aside from all these, there are those known as super indies, production companies around the world such as Endemol Shine Group, now a subsidiary of the French Banijay, Gaumont International, or the British Fremantle Media, a subsidiary of RTL Group from Luxembourg.

The need to produce content with very specific characteristics to reach niche audiences has positioned independent production houses as the most appropriate vehicle for large corporations to serve a fragmented market that nevertheless has a growing demand for content. As Andy Marken points out: “in every independent filmmaker there is a powerful instinct to find an audience for his audiovisual story”; and also: “the key is that they have low production costs, with access to reach a global niche market” (2015).

6.1 Hispanic broadcast television

For the Spanish language television in the United States, independent houses have played a central role in the development of their content production strategies. In particular, Telemundo has relied on production from Latin America in its battle

for ratings against Univision. Important to underscore that Univision has benefited from the programming made in Mexico by Televisa. Thus, the way in which Telemundo found its way to ratings has been through a path of experimentation in collaboration with indie producers, between the way of telling its stories and the correct cultural and linguistic equation to reach the Latino audience in the United States. In particular, the production of Telemundo, *La Reina del Sur* (2011) with RTI (Colombia), Argos (Mexico) and Antena 5 (Spain) will establish a narrative and production template called *reglocal* (Piñón, 2014). This template will later be used by Telemundo in the production of *El Señor de los Cielos* (2013) with Caracol TV (Colombia) and Argos (Mexico) and *Señora Acero* (2013) with Argos (Mexico); this template being the key to the upward success of the network in the 2010s.

For its part, Univision, now TelevisaUnivision, benefited from the production of Cisneros Media in Miami (Venevision Internacional) until 2017, and now relies on the production of W Studios in association with Lemon Studios, to produce *La Piloto*, a type of story that emulates the *narconovela*, which is successful with young and male audiences and, at the same time, work to reinforce Televisa with its “*La Fábrica de Sueños*” brand with the short version remake of the network’s most famous telenovelas.

6.2 Cable and Premium Television

The need to localize fictional content to enter the Latin American market will be championed by cable premium television network HBO in the region, or by other cable networks with transnational presence and Latin American corporate divisions such as Disney Latin America, MTV or Nickelodeon, which have led since the 2000s to create a connection with local independent production houses. In this effort, HBO received support for the production of television series with the Brazilian companies: *Conspiração Films*, *O2 Films*, and *Pindorama Films*. As well as the Argentine company *Polka* and the Mexican company *Argos*. For its part, Disney produced telenovelas with Argentina through: *Polka*, *Pegsa Group* and *Non Stop*; as well as series in Mexico with: *BTF Media*, *Somos Producciones* and *Ideas del Sur*. Meanwhile, MTV Latin America produced telenovelas with *Teleset* and *Laberinto Producciones* in Colombia as well as with *Argos* in Mexico. And through its channel, Nickelodeon also produced with *Teleset* in Colombia, and *Somos Producciones* in Miami; but it also worked with *Televideo*, *MediaPro Studios* and with indies in Argentina, Chile and the United States.

6.3 SVOD streaming platforms

The entry of streaming platforms into the Ibero American market in the field of fiction production will mean an explosive increase in relation to the number of production houses that now produce for US streaming corporations to consider:

Netflix, Prime Video, HBOMax, Disney+, Star+, Paramount+, Lionsgate+, Starz+, Apple+, Vix+, and Canela. Thus, the inventory that we propose in relation to the internationalization of fiction in Latin America is linked only to corporations and independent production houses producing content for these platforms, which ensures visibility that goes far beyond their local (national) market, to have a significant presence in the Ibero-American and Hispanic market in the United States, with a significant potential for global impact.

It is important to remember that the production review only included fiction titles in cable television and US platforms for the Hispanic or Latin American market. Thus, this study counted the indies that participated in the production of 39 fiction titles for cable and 218 fiction titles for SVOD, with a total of 257 productions. Within this sample, 13 large US corporations were found commanding the majority of production, but also five super indies, 34 Latin indies in the United States, and 135 production houses working in the region.

This demonstrates, on the one hand, the power of US corporations in the digital ecology, and on the other, the enormous opportunity for local production houses to participate in the region. In this sense, we will find indies making several productions for a single platform in part due to the success of their productions, such as the Spanish Vancouver Media (*La Casa de Papel*), Zeta Producciones (*Elite*) for Netflix; however, we can also find them in a kind of content contract that has assured them continuity like the deal that the Colombian Dynamo Producciones (*Frontera Verde*) made with Netflix; or the Brazilian ones: Cimarron Cine (*Veredicto*) and Conspiração Films (*Electa*) with Amazon; Argentina's Non Stop Producciones (*Bia, Un Mundo Al Revés*) for Disney, Disney+ and Star+.

But, in other cases, we see indies producing for very different platforms as a sign of market consolidation that ensures a long life within this new ecology of digital media. The group I call "consolidated indies" is a clear example of a process of diversification and internationalization of their services. Among the 187 production entities resulting from my inventory in content produced for US platforms streaming in Latin America, 18 independent companies stood out, which I consider consolidated.

Table. 8. List of consolidated independent production houses working for SVOD players

	Indies Production Houses	Country	Broadcast	Pay	SVOD
1	Polka (Artear)	Argentina	El Trece, Televisa	TNT, Fox, HBO, Disney, MTV	Netflix, HBOMax
2	Underground (Telemundo-NBC)	Argentina	AmericaTV, Telefe, Telemundo	Discovery, NatGeo	Netflix, HBOMax,
3	Conspiração Films	Brazil	TV Globo	HBO, Fox	Netflix
4	Boutique Filmes	Brazil		HBO	Netflix, Amazon, Disney+, Globoplay,
5	O2 Films	Brazil	TV Globo	HBO	Netflix, Amazon, HBOMax, Globoplay
6	Mixer	Brazil	Banderaintes, TV Brasil	Discovery, HBO, Sony	Globoplya, Netflix
7	Fabula Producciones	Chile	TVN	HBO	Netflix, Amazon, Pantaya/Vix
8	Dynamo Producciones	Colombia	Univision,		Netflix, Amazon, Apple+
9	Vista Producciones	Colombia	RCN, TV Azteca		Star+
10	Bambu Producciones	Spain	Antena 3, La1, LaSexta, #0	HBO	Netflix, Amazon, Movistar+
11	Globomedia (Imagina)	Spain	Antena 3, Telecinco, LaSexta	Fox España, HBO España	Amazon, Movistar+, Atresmediaplay,
12	Secuoya	Spain	TVE, CanalSur, Telemundo		Vix+, Disney+, Starz, Amazon, Movistar+
13	MediaPro (Imagina)	Spain	TVE, CanalSur	Nickelodeon, Sky, HBO	HBOMax, Amazon, HBOMax+, Netflix
14	Argos	Mexico	TV Azteca, Telemundo, Cadena3	HBO, MTV	Netflix, Vix+
15	BTF Media	Mexico	Univision, TV Azteca, RCN, Telemundo, TeleAmazonas, Venevision, Latina Peru	TNT, Sony	Netflix, Amazon, Disney+, Star+, HBOMax, Claro
16	Lemon Studios	Mexico	Televisa, Univision	HBO, MundoFox, Canal Once	Netflix, Vix+
17	TIS The Independent Studios (Paramount Global)	Colombia Mexico	RCN, Telefutura, Telemundo, Caracol TV, EstrellaTV	MovieCity, MundoFox, Fox, NatGeo	Netflix, Amazon, Disney+, Paramount+
18	Somos Producciones	Hispanic USA	Telemundo	Disney, TNT, Nickelodeon	Amazon, Disney+

To the previous group we could add a list of independent houses that are very active in production, particularly as a result of the creation of the platforms and that are in a very important period of consolidation like the indies from several places like: from Argentina: Kapow, Pampa Films, Non Stop; from Brazil: Glaz Entretenimiento, Prodigio Films; from Spain: Zeta Producciones, Vancouver Media, Gloria-Mundi, Pegsa Group; from Mexico: Dopamine, Perro Azul, Noc Noc Cinema (Mr. Woo) (Netflix); and the Puerto Rican Piñolywood Studios.

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VENEZUELA: FOREIGN AND INDEPENDENT PRODUCTIONS AND ON-SCREEN BROADCASTS^{1 2}

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Introduction

In 2022, foreign productions were broadcast on free-to-air channels. As in previous years, national broadcasts formed an important part of the programming schedule, with productions from the 1980s, 1990s and early 2000s. The series *Carabobo*, *Caminos de Libertad*, second season, financed with state resources, premiered simultaneously on four national television channels. This year, even though political, social and economic problems persist in the country, alternative serialized fiction, which is generated with low resources and allows for the dissemination of content that, for example, promotes the values of democratic coexistence, became an option for audiences.

1. The Venezuelan audiovisual context in 2022

The Venezuelan audiovisual context has not changed much in recent years. Public channels prevail over private channels, as well as self-censorship and restrictions on the broadcasting of content, due to the legal regulatory framework. Access to streaming platforms continues to grow and position itself, along with subscription television. And the dissemination of content through free platforms such as YouTube or others such as Daily Motion, where archives of Venezuelan telenovelas such as *Por Estas Calles* (1992) with more than 400 episodes or *Mi Prima Ciela* (2007) can be found.

¹ Translation: Carmen Elena Contreras

² We thank Fundación En Plural for its financial support for the publication of the Obitel Venezuela Chapter

1.1. Free-to-air television in Venezuela

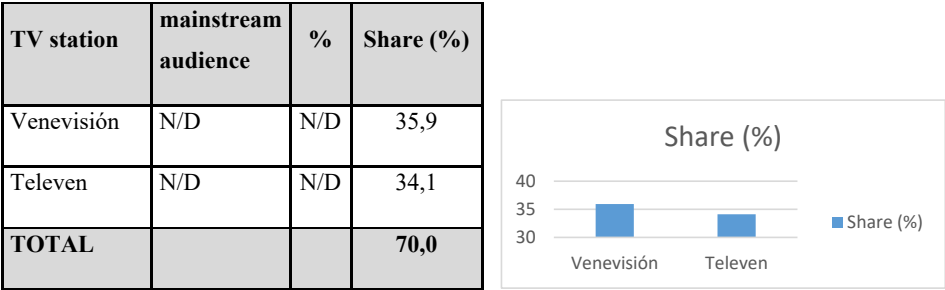
Table 1. National free-to-air television chains / channels in Venezuela

Private channels (9)	Free-to-air channels (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

There are a total of 22 free-to-air channels broadcasting nationwide, of which 13 belong to the public sector and nine to the private sector. Of the 13 public channels, four broadcast political and propagandistic content, alluding to the achievements of the current government, especially the government administration of Nicolás Maduro. On the other nine channels, educational, cultural and musical content prevails, which is broadcast alongside informative content.

Figure 1: Audience and TV share by broadcaster (rating per household)

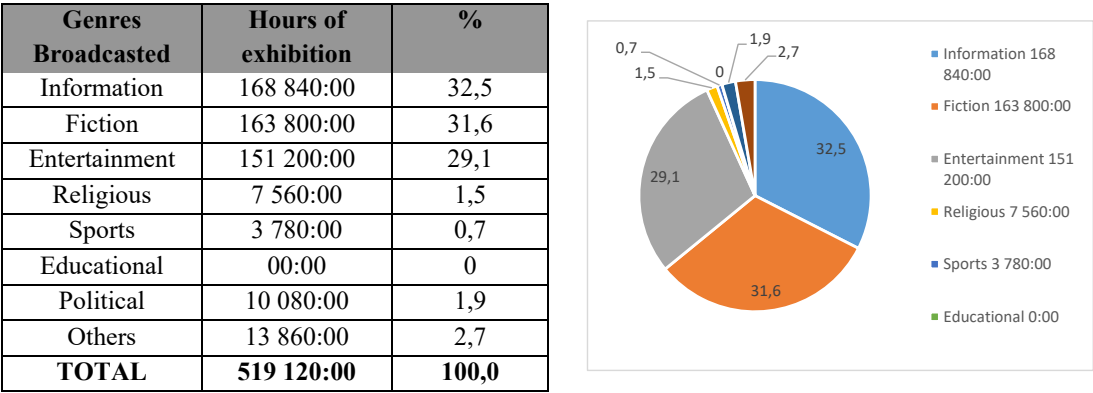


Source: Obitel Venezuela

At the beginning of 2022, BB Media, a global Data Science company, announced that it would start measuring audiences in Venezuela. It is worth remembering that the company Nielsen announced the cessation of its operations and withdrew from

the country in 2021. This situation has already been noted.³ Graph 1 was prepared based on the information published by Venevisión and Televen channels, and with the information published by BB Media during the months of July, August, September, October and November 2022. To date, there is no information on audiences during 2022, so this report does not reflect that data.

Figure 2: Genres and hours broadcast in TV programming



For Graph 2, the programming of five television channels⁴ (Venevisión⁵, Televen, Tves, VTV and Globovisión) was studied during the six-month period. It can be seen that, as in previous years, the news and fiction genres are the ones with the highest number of hours shown. The number of hours shown dedicated to fiction fell in 2022. In the case of the television stations Tves, Televen and Venevisión, we see that they gave up their slots for the broadcasting of sporting events (FIFA World Cup Qatar 2022, Venezuelan Professional Baseball League, Venezuelan Professional Football League, Professional Basketball League, among others), which altered the programming schedule. This situation generated complaints on social networks from users who wanted to watch telenovelas. There were also complaints from the audience about the constant failures in the signals, audio, and live broadcasts.

1.2. Pay TV and VoD platforms in Venezuela in 2022

According to the latest report published by the Venezuelan National Telecommunications Commission (Conatel), corresponding to the second quarter of 2022, the Venezuelan pay TV sector experienced a small increase. From 3,231,977 subscribers in 2021, it went to 3,259,761 subscribers in 2022. This represents a timid increase.

³ Nielsen Venezuela was the “only company that kept track of the rating and share of free-to-air television” (Torrealba et al., 2022, p. 431).
⁴ Due to the difficult access to the channels’ programming, we selected those channels whose programming is available through different media (social networks, official websites).
⁵ On 1 March, Venevisión celebrated its 61st anniversary as the oldest and most important private television station in Venezuela.

The number of subscribers of pay TV companies operating in the country was distributed as follows: in first place, SimpleTV with 43.11% of subscribers; Intercable with 17.16%; in third place, state-owned Cantv with 8.18%; Telefónica in fourth place with 5.16% of subscribers and, finally, NetUno with 2.88%. Movistar+ Telefónica stopped offering its pay TV services in the country in November 2022. It agreed with the company Inter, so that subscribers who so wished could migrate to this operator, without having to change their equipment (decoders and antennas) and without paying a different cost for accessing the service. On the other hand, the Open Satellite Television (FTA) project - launched in early 2021 by Conatel - continues to offer Venezuelans free satellite television through the Intelsat 35e satellite. This service has 50 national and international TV channels and 10 satellite radio channels, and to enjoy its content it is necessary to purchase a kit, which, according to its official website, costs approximately US\$40⁶. The offer includes channels from Argentina, Brazil, Bolivia, Colombia, China, Cuba, Ecuador, the United States, Iran, Honduras, Mexico, Peru, the Dominican Republic and Venezuela.

The presence of small providers that, in exchange for a monthly fee, offer subscriptions to streaming platforms, such as Net Revolution, FlixTV Venezuela, Vitrina Venezuela, among others, was accentuated. This service facilitates access to services such as Netflix, Disney+, Amazon Prime, among others.

In 2022, three national channels were registered that broadcast only for pay TV: VePlus, the international signal of the Venezuelan channel Venevisión (owned by Organización Cisneros); IVC Networks (owned by Ole Communications), a channel dedicated to entertainment; and Sun Channel, a thematic channel on tourism (operated by Neva Network, Bitt Channel and Frida Media).

The different subscription TV services available in Venezuela offer a wide range of national and international channels. However, it is complex to establish which are the most watched channels, due to the fact that there is a lot of opacity in the information related to these issues. Despite this, the consultancy BB Media⁷, published some of the most watched pay TV channels during 2022 in Venezuela: DSports, Antena 3, RTVE and Universal.

⁶ FAT Venezuela. Open Satellite Television. Official website: ftavenezuela.com.ve

⁷ The Daily Television (2022). BB Media reveals Top Ten of free-to-air and pay TV in Venezuela. <https://bit.ly/3odlGxM>

Table 2. Pay-TV channels in Venezuela

Most watched pay-TV channels in Venezuela		
Channel	Genre	Origin
DSports	Sports	Latin America
Antena 3	Varied	Spain
RTVE	Varied	Spain
Universal	Fiction	United States

Source: Obitel Venezuela

There is no data available to account for subscribers to VoD platforms in the country. Some pay-TV companies offer users various options to enjoy the service of the most popular streaming platforms worldwide. Various sources claim that Netflix is the favorite among Venezuelans. According to González (2022), half of Venezuelans consume Netflix even for the telenovelas. 48.5% enjoy streaming on TV and 40% use shared passwords.

[...] when asking those who responded affirmatively about the device, they use to enjoy this streaming service, we have that, once again, almost half of the users (48.6%) consume their content through a television, which obviously has an internet connection. Meanwhile, 33.2% watch their series or films from the app installed on their smartphone and 18.2% do so on a computer (González, 2022, para.7).

1.3. Sources of funding in the audiovisual sector.

During 2022, Conatel continued its policy of collecting taxes for the telecommunications sector, including the parallel fiscal contribution (4% of gross revenues, earmarked for the Social Responsibility Fund). This is provided for in Article 24 of the Law on Social Responsibility in Radio, Television and Electronic Media. Through this Social Responsibility Fund, Conatel kept open the reception of independent audiovisual production and research projects. The details of the amounts collected as part of the parallel fiscal contribution are unknown, as are the details of all the products financed and produced with this fund.

On the other hand, the production and distribution of low-budget independent productions continued. Of particular note was the second season of the series *Vivir y Convivir en Venezuela*, which was financed by donations and featured two members of the Venezuela research team: Morella Alvarado and Martin Hahn. The rebroadcasts of national and international fiction, broadcast by the main free-to-air television stations, implied a significant saving of resources, as the media had no production costs.

1.4. Communication policies

The Ley de Responsabilidad Social en Radio, Televisión y Medios Electrónicos (Resorte-Me), which regulates, among other aspects, the broadcasting of content; the Organic Law on Telecommunications, which establishes the conditions for obtaining and exploiting the radio spectrum; and the Ley Constitucional Contra el Odio, por la Convivencia Pacífica y la Tolerancia, which establishes prison sentences and the possibility of license revocation for those who broadcast content deemed to promote hatred, remain in force. The national government, through Conatel, continued the policy of expansion of the telecommunications market through the licensing of at least 19 operators offering internet services in various regions. It also continued the expansion of the Televisión Satelital Abierta (FTA) project, through sales operations of decoders around the country.

1.5. Digital and mobile connectivity infrastructure

The Covid-19 pandemic has changed the relationship between audiences and the media. Multi-screen mediated audiovisual consumption (TV, smartphones, tablets, smartTVs, PCs, laptops) has increased, enabling the satisfaction of information, education and entertainment needs. The relationship with digital media is more noticeable. The annual report by We Are Social and Hootsuite (2022), indicates that Venezuelan users who use the internet increased by 1.5%. That is, in 2022, 20.87 million people were actively using the internet, or 72% of the population, despite the fact that Venezuela still has one of the slowest connections in the world, and without taking into account migration figures. The average mobile internet connection speed is 5.76 Mbps, which translates into an increase of 0.32 Mbps (5.9%). The fixed internet connection is 6.51 Mbps, an increase of 3.46 Mbps (113%). These improvements are mainly due to the increase in services that offer internet via optical fibre, which have improved the service in some cities and towns in the country, such as Maracaibo, Porlamar, Valencia, Mérida, among others. The Digital Trends (2022) report indicates that the devices most used to access mobile connections are: mobile phone (43%), laptop (31%), desktop (25%) and tablet (2%).

According to figures from Conatel (2022nd), the distribution of the mobile telephony market by operator is divided as follows: 49.04% for Telefónica (Movistar); 34.57% for Digitel and 25.39% for Movilnet. According to We Are Social and Hootsuite (2022), the use of social networks increased by 15.45 million people in the country. This implies a growth of 10.4% compared to the previous year.

The report by Tendencias Digitales (2022) points out that the five most used social networks and direct messaging applications in Venezuela are: WhatsApp (62%), Facebook (58%), YouTube (55%), Instagram (39%) and Twitter (26%), with an increase in the number of users of TikTok (20%) and LinkedIn (18%). The same report points out the ten most common uses of the internet in the country: searching

for information (96%), sending and receiving emails (88%), banking (88%), visiting social networks (81%), reading news (81%), downloading files and/or applications (72%), watching videos (72%), chatting (67%), looking for a job (62%) and carrying out government procedures (53%). It is worth adding that despite these figures, a high percentage of the population remains disconnected, i.e. without permanent and quality access to internet services.

2. Analysis of the year: national and Ibero-American premiere fiction on free-to-air TV

To commemorate the Batalla de Carabobo, *Carabobo, Caminos de Libertad*, second season, the only publicly funded serialized fiction production of the year, premiered simultaneously on four channels on 19 April. This situation generates a distortion in the data, since it is the same product that premieres simultaneously on four channels. On the other hand, the situation of previous years is repeated in which, faced with the high costs of national production, television stations opted to premiere foreign productions, mostly from Mexico, Brazil and Colombia (see Table 1). This year Televen and Vive premiered two productions outside Obitel's scope: *No Olvides* (telenovela-Philippines) and *José el Profeta* (miniseries-Iran).

Table 1. Premiere fictions screened in 2022
(domestic, foreign Obitel and co-productions)

UNRELEASED NATIONAL TITLES-1	UNRELEASED FOREIGN TITLES - 18
Vive TV	Venevisión
1. <i>Carabobo, Caminos de Libertad.</i> (serie-Venezuela)	5. <i>Totalmente Diva</i> (telenovela-Brasil)
VTV	6. <i>Imperio</i> (serie-Brasil)
2. <i>Carabobo, Caminos de Libertad.</i> (serie-Venezuela)	7. <i>Pecados Capitales</i> (telenovela-Colombia)
TVES	8. <i>Nosotros los Guapos</i> (serie-México)
3.- <i>Carabobo, Caminos de Libertad.</i> (serie-Venezuela)	9. <i>Querer sin Límites</i> (telenovela-Brasil)
Televen	10. <i>Hermanitas Calle</i> (serie-Colombia)
4.- <i>Carabobo, Caminos de Libertad.</i> <i>2da temporada</i> (serie-Venezuela)	11. <i>Familia de Diez</i> (serie-México)
TOTAL UNPUBLISHED TITLES: 1	12. <i>40 y 20</i> (serie-México)
	13. <i>Papá a Toda Madre</i> (serie-México)
	Televen
	14. <i>Fuego Ardiente</i> (telenovela-México)
	15. <i>Soltero con Hijas</i> (telenovela-México)
	16. <i>Como Tú No Hay 2</i> (telenovela-México)
	17. <i>La Ley del Corazón</i> (telenovela-México)
	18. <i>Si nos Dejan</i> (telenovela-México)
	19. <i>La Desalmada</i> (telenovela-México)
	20. <i>La Herencia: un Legado de Amor</i> (telenovela-México)
	21. <i>Reina de Indias y el Conquistador</i> (telenovela-México)
	22. <i>Vencer el Desamor</i> (telenovela-México)
	TOTAL UNPUBLISHED TITLES: 19

Source: Obitel Venezuela

As can be seen in Table 1.b., national reruns led the way during 2022. The telenovelas *Las Amazonas* (1985) and the series *Muñeca* (1989) were rebroadcast decades after their premieres. Productions dating from the late 1990s and early 2000s returned to Venezuelan screens: *Entre tú y yo* (1997), *El País de las Mujeres* (1998), *Jugando a Ganar* (1998), *Amantes de Luna Llena* (2000), *El Amor las Vuelve Locas* (2005) and *Robando Corazones* (2008). Televen, repeated for the third consecutive year the telenovela *Guayoyo Express* (2005).

Table 1.b. Exhibition of repeated titles during 2022
(national, foreign Obitel titles and co-productions)

Repeated national titles - 19	Repeated foreign titles - 10
Venevisión	Venevisión
1. <i>Mi Niña Amada</i> (serie)	1. <i>Carita de Ángel</i> (telenovela–Brasil)
2. <i>Las Amazonas</i> (telenovela)	2. <i>La Reina del Flow 2</i> (telenovela-Colombia)
3. <i>Muñeca</i> (serie)	3. <i>Mi Querida Herencia</i> (serie–México)
4. <i>¡Qué Clase de Amor!</i> (serie)	4. <i>Vecinos</i> (telenovela-Colombia)
5. <i>El País de las Mujeres</i> (telenovela)	5. <i>Amor Mío</i> (telenovela-España)
6. <i>Cartas del Corazón</i> (unitarian)	6. <i>Nuevo Rico Nuevo Pobre</i> (serie-Colombia)
7. <i>Entre tú y yo</i> (telenovela)	Televen
8. <i>Las González</i> (telenovela)	7. <i>La Otra Cara del Alma</i> (telenovela-México)
9. <i>Jugando a Ganar</i> (miniserie)	8. <i>Carrusel</i> (telenovela-Brasil)
10. <i>Robando Corazones</i> (serie)	9. <i>Mujeres al Limite</i> (unitarian-Colombia)
11. <i>El Amor las Vuelve Locas</i> (telenovela)	10. <i>Tu Voz Estéreo</i> (telenovela–Colombia)
12. <i>Entre tu Amor y mi Amor</i> (telenovela)	TOTAL repeated titles: 29
13. <i>Amantes de Luna Llena</i> (telenovela)	
Televen	
14. <i>Carabobo, Caminos de Libertad</i> (serie)	
15. <i>Guayoyo Express</i> (telenovela)	
16. <i>Libres como el Viento</i> (telenovela)	
17. <i>Nadie me Dirá Como Quererte</i> (telenovela)	
Tves	
18. <i>Vivir para Amar</i> (telenovela)	
19. <i>Teresa en Tres Estaciones</i> (telenovela)	

Source: Obitel Venezuela

Table 2, called formats of national fiction premieres in 2022 and their evolution in the five-year period, should reflect the evolution of national productions in the country, but due to the economic crisis that the sector is going through, the table does not show an evolution but a stagnation. Titles have not been increasing, on the contrary, they have remained at one or two productions per year, of which: *La Dama y El Vigilante* (2019), *Carabobo, Caminos de Libertad* (2021) and *Carabobo, Caminos de Libertad*, second season (2022) correspond to productions financed with public funds. Other fictions such as *Libres Como el Viento* and *Angélica Pecado*, both from RCTV, which appear as premieres in 2021, were produced in 2009, only they had not been premiered by Televen, which may also distort the figures. In 2020, there were no productions, but *Carolay*, which premiered in 2019 and continued until

2020, is reflected. In this sense, although the table reflects eight productions in the five-year period, only five were produced.

Table 2. Formats of national fiction premieres in 2022 and their evolution over the five-year period

Format	Titles						Hours					
	2018	2019	2020	2021	2022	Total	2018	2019	2020	2021	2022	Total
Telenovela	1	0	0	2	0	3	60:00	0:00	0:00	300:00	0:00	360:00
Series	0	2	1	0	1	4	0:00	35:00	3:00	0:00	240:00	278:00
Miniseries	0	0	0	1	0	1	0:00	0:00	3:00	0:00	0:00	3:00
Sitcom	0	0	0	0	0	0	0:00	0:00	0:00	0:00	0:00	0:00
Unitarian	0	0	0	0	0	0	0:00	0:00	0:00	0:00	0:00	0:00
Docudrama	0	0	0	0	0	0	0:00	0:00	0:00	0:00	0:00	0:00
Others	0	0	0	0	0	0	0:00	0:00	0:55	0:00	0:00	0:55
Total	1	2	1	3	1	8	60:00	35:00	6:55	300:00	240:00	641:55

Source: Obitel Venezuela

Table 3 shows the situation of national productions, since only one title was released during the year: *Carabobo*, *Caminos de Libertad*, second season, the rest of the fiction released corresponds to Obitel countries. It is headed by Mexico, with 13 titles, followed by Brazil with five and finally Colombia with four productions.

Table 3. Premiere fiction screened in 2022: Venezuela

Country	Titles	%	Hours	%
NATIONAL (total)	1	5	240:00	14
OBITEL COUNTRIES (total)	18	95	1529:00	86
Argentina	0	0	0:00	0
Brazil	3	16	361:00	20
Chile	0	0	0:00	0
Colombia	2	11	283:00	16
Ecuador	0	0	0:00	0
Spain	0	0	0:00	0
EE.UU. Spanish speakers	0	0	0:00	0
México	13	68	885:00	50
Perú	0	0	0:00	0
Portugal	0	0	0:00	0
Uruguay	0	0	0:00	0
Venezuela	1	5	240:00	14
COPRODUCTIONS (total)	0	0	0:00	0
National Co-productions	0	0	0:00	0
Obitel Countries Co-productions	0	0	0:00	0
TOTAL	19	100	1769:00	100

Source: Obitel Venezuela

Table 4 shows that the prevailing formats on free-to-air channels are: telenovelas and series. It should be noted that some television channels broadcast other formats, but they are not among the year’s premieres.

TABLE 4. National and Obitel fiction formats shown in 2022

Format	Titles				Hours			
	Nationals	%	Other Obitel	%	Nationals	%	Other Obitel	%
Telenovela	0	0.0	15	83.3	240:00	100.0	1409:00	83.3
Series	1	100.0	3	16.7	0:00	0.0	283:00	16.7
Miniseries	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
Unitarian	0	0.0	0	0.0	0:00	0.0	0:00	0.0
Docudrama	0	0.0	0	0.0	0:00	0.0	0:00	0.0
Other	0	0.0	0	0.0	0:00	0.0	0:00	0.0
Total	1	100	18	100	240:00	100	1692:00	100

TABLE 5: 9 Most-watched titles in 2022⁸

Title		Channel	Producer (Country)	Format/ Genre	No. of chap/ ep 2022 ⁹	Time Band ¹⁰	Rating	Share
1	<i>Cartas del Corazón</i>	Venevisión	Venevisión (VE)	Unitarian / Drama	260	Afternoon	N/D	38.31
2	<i>Tu Voz Estéreo</i>	Televen	Caracol (CO)	Series / Drama	175	Afternoon	N/D	36.35
3	<i>Totalmente Diva</i>	Venevisión	Rede Globo (BR)	Telenovela / Drama	161	Afternoon	N/D	36.11
4	<i>Si nos Dejan</i>	Televen	W Studios (ME)	Telenovela / Drama	121	Evening	N/D	34.31
5	<i>Imperio</i>	Venevisión	TV Globo (BR)	Telenovela / Drama, Mistery	180	Evening	N/D	32.76
6	<i>Pecados Capitales</i>	Venevisión	Caracol (CO)	Telenovela / Comedy	145	Evening	N/D	31.30
7	<i>Las Amazonas</i>	Venevisión	Venevisión (VE)	Telenovela / Drama	187	Evening	N/D	30.35
8	<i>La Ley del Corazón</i>	Televen	Rede Globo (BR)	Telenovela / Drama	163	Evening	N/D	25.67
9	<i>El País de las Mujeres</i>	Venevisión	Venevisión (VE)	Telenovela / Drama	225	Afternoon	N/D	18.89
10	N/D	N/D	N/D	N/D	N/D	N/D	N/D	N/D
Total domestic productions: 3				Foreign original scripts: 7				
30%				70%				

Source: Obitel Venezuela with BB Media data.

Table 5 shows only nine titles and not ten, because the information presented was obtained from the Venezuela ranking from 18 to 31 June 2022 published by BB Media. The information is organized by share because there is no up-to-date open access data on ratings. The top 9 is led by the Venezuelan Unitarian *Cartas del Corazón*, a production dating from 2015, which is “a platform for viewers to raise their problems, [which are then] dramatized in the form of a short telenovela or capsules [and] the hosts will express [sic] their opinion” (Diario República, 2015, para. 3). Table 5 also shows that the Venevisión channel has a greater presence than its competitor Televen.

⁸ As in previous years, the most watched titles do not correspond to the 2022 releases.
⁹ Information obtained from television programming available on the Web.
¹⁰ Due to the limited measurement data in the country, the prime time schedule is not known, so the

3. VoD 2022 Monitoring

3.1. VoD platform market

Since 2020, there has been a growth in the consumption of content from streaming platforms worldwide. In the case of Venezuela, this dynamic is strengthened by the offer of subscription TV services such as Simple TV and NetUno Go, which include some streaming platforms in their plans. “The costs of pay-TV services are rising, while streaming services are gaining strength by providing faster and lower-cost internet services” (Puccini, 2022, para. 1).

In 2022, according to the pollster Datanálisis, there was an “increase in services, such as technology, mobile telephony, Internet, of more than 13% on average” (León, 2022 in Ramírez, 2022, para.7). This resulted in many users of analogue technologies migrating to digital services, such as the Netflix streaming platform, which is the most popular in the country.

It is important to note that in Venezuela, as in other countries, an important part of access to Netflix is through the use of shared passwords. The company detected that:

One of its problems as a business was that around 100 million connections correspond to users of accounts paid for by others. Netflix allows you, depending on the type of account, simultaneous use of one, two and up to four ‘screens’ or devices (TVs, phones, computers), which led to the widespread use of password sharing to provide the service for free to someone else. This led to a slowdown [sic] in the company’s subscriber growth. They are therefore testing a new methodology in which an additional fee has to be paid to be able to connect outside the subscriber’s main residence (González, 2022, para. 8).

Services such as Amazon, Disney+ and HBO Max have also entered the Venezuelan market with strength. It would seem that traditional television has taken second place, due to the strengthening of streaming services. However, we see that in the face of the poor conditions of access to technology in the country, traditional television and subscription TV services remain the main source of access to audiovisual production in the country.

3.2. Supply of local VoD platforms in 2022 (national, regional within the country)

In view of the strong incursion of international platforms in the country, as well as the decision of entrepreneurs not to invest heavily in order to avoid putting capital at risk, there is no supply of national streaming platforms, not even in the rankings of the most consumed services. International service providers have been characterized by making exclusive, high-quality productions, which can only be seen through

time slot was placed according to the broadcasting schedule: afternoon (12:00-18:00) and evening (19:00-23:00).

their own media. As a result, the audiovisual offerings of Venezuelan services cannot compete with the content offered by the most popular international services.

Given this reality, it is difficult to find attractive Venezuelan VoD services, since the few existing ones have become more repositories of old productions than spaces for the promotion of new products that encourage consumption. Such is the case of RCTV, owned by Empresa 1BC, which broadcasts a large part of its old productions on platforms such as PrendeTV, Tubi, Vix, CanelaTV and Amazon Prime Video. Meanwhile, the popular Venezuelan channels Venevisión and Televen only stream live on their official websites, and Venevisión, like RCTV, includes some old youth serials and telenovelas on the aforementioned providers.

One of the most recognized Venezuelan streaming applications is still Vivo Play, but this platform is still blocked in the country by Conatel. Although, through this service, the audience that manages to overcome the blockade can enjoy various channels (Antena 3, Telemundo Internacional, A&E, SYFY, WB TV, Sony Channel, RCN Novelas, among others), the serialized fiction productions offered by the platform are primarily international.

3.3. VoD analysis in 2022: national and Ibero-American premiere fiction

Venezuelan productions on these platforms are very scarce; those that can be found on some VoD services date from before 2022. Telenovelas and youth series produced by RCTV and Venevisión stand out. On the Amazon Prime Video platform, we find telenovelas such as *Natalia del Mar* (2011-2012), *Un Esposo para Estela* (2009-2010), *Válgame Dios* (2012) and *Las Amazonas* (1985), from the Venevisión network. While from the production company RCTV we have: *Para Verte Mejor* (2017), *Amor Secreto* (2016), *Los Secretos de Lucía* (2014), *Corazón Esmeralda* (2014), *KaIna* (1995), *Ellas Aman*, *Ellos Mienten* (2018) and the series *Almas en Pena* (2020).

Table 6. National fiction and co-productions shown in 2022 in VoD systems

NATIONAL PREMIERE TITLES	PREMIERE CO-PRODUCTIONS
No national productions premiering on VoD platforms	Netflix (3) 01. <i>Santo</i> (series – España/Brasil) 02. <i>Diario de un Gigoló</i> (series – México/Argentina) 03. <i>El Rey: Vicente Fernández</i> (series - México/Colombia) Amazon Prime (1) 04. <i>Sentença</i> (series - Uruguay/Brasil) Paramount+ (1) 05. <i>Bosé</i> (series - España/México)
Total: 0	Total: 5

Source: Obitel Venezuela

Although Venezuela has not introduced new fictional products on the most popular streaming platforms, national talent has stood out in various productions for these media. One of the factors influencing this is associated with the migration process. This is the case of Venezuelan playwright Leonardo Padrón, who was in charge of writing the Colombian series *Pálpito* (2022), a thriller created exclusively for Netflix, whose plot revolves around a man who seeks revenge on an organ trafficking network that murdered his wife. Venezuelan filmmaker Joel Novoa, meanwhile, was hired in 2022 to direct two episodes of the famous Netflix series *Cobra Kai* (2018). Novoa was in charge of episode five: *Match Point* and episode six: *Kicks Get Chicks*, both from the fourth season.

Venezuelan comedian and writer Joanna Hausmann is the writer of the Disney+ animated series *Hamster y Gretel* (2022). In its contents there are several references to Venezuela, for example, the mother of the main characters is Venezuelan, sometimes the characters eat arepas and in the house there is a beautiful picture of El Ávila, a mountain that borders the north of Caracas. Meanwhile, the writer of the Venezuelan series *Somos Tú y Yo* (2007), Naylis Sánchez, is part of the team of writers for the Disney+ series *Gina Yei* (2023), which will premiere in 2023. Other talents such as Carlos Villegas Rosales (Director of the projects *La Reina del Sur 3*, *Buscando a Frida*, *El Señor de los Cielos 3*, *El Señor de los Cielos 6*, *La Doña 1*, *La Doña 2*, *Señora Acero 2*, *José José, el Príncipe de la Canción*, among others), as well as Erasmo Colón (Art Director of *Operación Orion*, *Al Otro Lado del Muro*, *Jenni*

Rivera: *Mariposa de Barrio*, *Decisiones: Unos Ganan Otros Pierden*, among others), José Vicente Scheuren (Producer on *Decisiones: Unos Ganan Otros Pierden*, *Club 57*, *La Fuerza del Creer 2*, *Relatos de Un Sueño Americano*, among others) and Jhonny Semeco (Director of Photography on *Commissaire Magellan*, *Joséphine*, *Ange Gardien*, *Asesinato en Blois*, *Origines*, *La Trouvaille de Juliette*, among others).

Likewise, some Venezuelan actors have a presence in streaming. Humberly González has participated in several series such as *In the Dark*, *Ginny and Georgia* and *Jupiter's Legacy*. Actor Eduardo Navas played the character Rafael in a new episode of NBC's *New Amsterdam*. Renowned actress Gaby Espino participated in the Netflix series *El Rey*, *Vicente Fernández*, in which she played Verónica Landín, a character presented as the Charro de Huentitán's eternal rival. In the famous superhero series, *The Umbrella Academy* - also from Netflix - actress Génesis Rodríguez played Sloane, a member of the Sparrow Academy, who has the ability to manipulate the force of gravity at will.

4. Interactivity and audience participation

The constant interruptions of electricity services (in 2022 there were 233,298 black-outs nationwide, an increase of 22% over 2021, according to a follow-up by the Committee of People Affected by Blackouts, referred to by Bravo (2023) and internet (the non-governmental organization Espacio Público¹¹ counted 50 outages between January and October) and the prevailing censorship and self-censorship of television make audience participation limited in the country.

Television channels only encourage interaction with viewers to promote nationally produced content. Therefore, fiction is an almost absent genre in the spaces for interactivity and audience participation in Venezuela. This pattern has been maintained for at least a decade.

Thus, although Facebook is the social network with the largest number of users in Venezuela (according to the agency 2im Marketing¹² at the beginning of 2023 it had 11.90 million users in the country; followed by Instagram, with 6.10 million and, after Messenger and LinkedIn, Twitter, with 1.90 million), the platforms par excellence for audiences of national television channels to express their points of view on the content broadcast on screen are Instagram and Twitter. The dynamic consists of inviting people through the screens to interact with the content on the different social media accounts of the channels or TV programs and then reading some comments on air. This happened in 2022 in

¹¹ Runrun.es (Sep, 2022) Espacio Público: Internet service interruptions increased between January and August. <https://runrun.es/noticias/484727/espacio-publico-aumentaron-las-interrupciones-al-servicio-de-internet-entre-enero-y-agosto/>

¹² 2im Marketing (2023) Most used social networks in Venezuela 2023 [Blog]. <https://2immarketing.com.ve/redes-sociales-mas-usadas-en-venezuela/?cn-reloaded=1>

sports, opinion and variety programs, which are the ones currently produced by Venezuelan television. In the last quarter of the year, Televen's official Instagram account (@televentv) was dominated by posts about the Qatar 2022 World Cup, partially broadcast on that channel. And in the same period, on Venevisión's official Instagram account (@venevision), *Miss Venezuela 2022* was the most popular program. On both accounts, nationally produced entertainment morning shows also had a strong presence.

In the context outlined above, audiences were able to express very little opinion about fiction on @televentv and, to a lesser extent, on @venevision. Thus, of the 726 posts made on Televen's Instagram account, 20 (2.75%) were flyers about foreign premieres and reruns. Meanwhile, 884 posts were published on Venevisión's Instagram account in the same three months, of which three (0.33%) were about the television plant's imported fiction. It is worth noting that in most of the 20 posts about @televentv's fiction in the period analyzed, audiences complained about the suspension of the transmission of telenovelas due to the World Cup games. "Stay with your telenovelas and give the football to another channel that will show it live" and "Televen NO [sic] is not a sports channel and they prefer not to show the telenovelas to show a delayed game. It's a lack of respect for all viewers", were two of the comments on a video of actor Daniel Elbittar, in which he greeted the followers of @televentv and invited them to watch the premiere of *La Desalmada*, of which he was a member of the cast. In addition, another striking element in these interactions were viewers' complaints about the sudden departure from the air of the Brazilian revival *Xica da Silva*. "Can they be serious and tell the audience if they are going to continue showing Xica Da Silva," was one of the 63 comments on a 17 November post about the announcement of the premiere of *La Desalmada*.

A different scenario is found with the Instagram account of the series *Vivir y Convivir en Venezuela*, which has an organic growth of 57.6 followers. Among the comments that stand out are "@luzstella5 . Today by chance I saw a reel, and I loved it, I'm going to start watching it, what a joy and excitement to see great artists". "@griscolina05. I really like chapter 7 of the first season called El hallaquero. It portrays this era and our people. If you haven't seen it I invite you to watch it on the show's YouTube channel". @wilberrivero. When do they make more chapters? @yelyrebollo. I love it I love it I love it congratulations to everyone who makes it possible to Live and Live Together in Venezuela VE. @keveryv. I didn't know this existed and I'm going to watch that telenovela.

5. The year's highlights

The decrease in the production of fiction serials for broadcast on air and cable during the year 2022 is proof, on the one hand, of the multifactorial crisis experienced in the

country, and on the other hand, of the decision of the major production houses and television channels to stop producing serialized fiction content. There are several reasons for this. The first is economic instability, although the country is undergoing a process of dollarization and there is evidence of large bubbles in which the exacerbation of luxury and waste are key to the intuition that some of the investments come from unclear funds, in which corruption plays an important role. The second reason is associated with the lack of interest and intention of the big production houses in generating serialized fiction content due to the high costs, which is why they resort to the use of canning and repetitions to retain audiences. And finally, the behavioral changes of some audiences who prefer to interrelate with serialized fiction through the services offered by cable operators, as well as Video On Demand, both those operating in the country and those accessed through different types of transactions (account loans, payment to intermediaries, among others).

However, despite the serious political, social and economic problems Venezuela is going through, some audiovisual creators have overcome difficulties in producing content to cover part of the Venezuelan consumer's entertainment needs. This is mainly due to the advantages offered by mobile devices, as well as social networks as spaces for the circulation of content.

Thus, for the year 2022, the highlights of the year are summarized in: a) Presence of fiction production financed by public funds. b) Maintenance of serialized fiction production generated from the margins. c) Presence of alternative serialized fiction contents, generated under the budgets of the *edutainment* for the promotion of the values of citizen coexistence, as well as for denouncing the violation of human rights.

In the first case, the only premiere production that was broadcast on Venezuelan cable and free-to-air screens was *Carabobo, Caminos de Libertad*, second season (2022). Conceived as a miniseries (12 episodes), it was directed by the historian Luis Alberto Lamata and produced by the Villa del Cine in 2020. The first season was broadcast on Venezolana de Televisión (VTV), Televisora Venezolana Social (Tves), Televen, Vive TV, TVFanb, Vepaco TV and Asamblea Nacional TV (ANTV). Both the first and second seasons were filmed during the pandemic as part of a government project to commemorate the 200th anniversary of the Batalla de Carabobo.

In terms of alternative production to traditional systems, we have, for example, the youth webseries *Me la Tiro de... La serie*, created by a group of Venezuelan influencers (Marián Corrales, Rafa Estanga, Luis Herrera, Manuel Díaz and Macarena Colasante), whose first episode was published on YouTube on 24 July 2022. The plot revolves around issues related to bullying, social class differences, gender identity, male prostitution, the influence of social networks, neuro-divergent people, among others of interest to teenage audiences. Stylistically, the plot is a combination of drama, comedy and suspense. The web series is also the transmedia version of the stage show *Me la Tiro de...El Show*, classified as a "musical parody", which premiered in

April 2022. The screening of the last chapter of the first season took place simultaneously in two cities in the country (Caracas and Mérida) in alliance with the Cinex cinema distribution circuit and the show production company Evenpro. This highlights the creation of alliances for the promotion of content beyond social networks. To date, the first chapter has 36.8K on TikTok and 743,610 views on YouTube. The channel also includes Shorts, which complement the story.

Within the margins fiction group, we find *Ganar o Morir*, whose first chapter was published on 17 June 2022, and was produced in the state of Cojedes. *Sed de Venganza*, published on 13 July 2022 on the YouTube channel of the production company El Perro films. *El Ciprés*, whose first chapter was published on 17 July 2022, on the *LB Producciones* channel: “A series based on real life, which aims to leave a positive message in society, making it clear that all the props used are 100% props and special effects”. *Rutina de Barrio*, released on 30 August 2022, is produced in the area of Casalta in western Caracas and is part of the acting and urban film workshops of *Fundación Unidos Films*. Finally, *Resurrección 1. Serie Capos & Maleantes*, which is presented on YouTube under the slogan, “The only medicine against suffering, delinquency, and all the other evils of humanity, is wisdom”. The first episode was released on 19 November 2022. The three productions portray the criminal world, its transgressions, as well as the everyday life in the neighborhood.

In the third group, we find the independent news website El Pitazo, produced *Te la Cuento Yo*, a project developed by Yoyiana Ahumada which, through pieces of performative journalism, exposes themes related to the Venezuelan political-social reality. This project seeks to use art as a vehicle for peace and social transformation. In this same tone, regarding the creation of products that seek to strengthen citizen values, the Think Tank Imaginantes, the Visual and Digital Culture Laboratory of the Communication Research Institute (ININCO) of the Central University of Venezuela (UCV), together with the Global Observatory of Communication and Democracy (OGCD), premiered -in 2022- the second season of the web series *Vivir y Convivir*, a dramatic comedy, written and directed by playwright Martin Hahn, whose main purpose is to show a message that allows the reunion of citizens of the same nation, through the enhancement of the values that unite us as Venezuelans, the peaceful resolution of conflicts and, above all, the importance of the exercise of democratic citizenship.

These productions go unnoticed, as most independent producers do not have the necessary resources for adequate promotion, let alone global distribution to make their products successful. For this reason, a large part of the independent productions made in the country are exhibited -mainly- through YouTube or other social networks such as TikTok, Facebook and Instagram, as well as in community, academic and local government spaces.

6. Theme of the year: independent production companies and the internationalization of television fiction production in Ibero-America.

According to Venezuelan law, the National Independent Producer (PNI/NIP) is:

A natural or legal person duly registered in the Register of Independent National Producers and certified as such by the Ministry of People's Power for Communication and Information, in accordance with the provisions of the Law on Social Responsibility in Radio, Television and Electronic Media, the rules on the Register of Independent National Producers, and other regulations governing the matter (MippCI, 2022).

This figure was established on the basis of the Ley de Responsabilidad Social en Radio, Televisión y Medios Electrónicos (Resorte / Resorte-Me), approved in 2004 and amended in 2011, which in Article 13 establishes that the requirements for registration under this figure are: to reside in Venezuela, not to be a shareholder or director of any company providing radio and television services, not to be a public official linked to the areas covered by the law, to declare whether one has a subordinate relationship with any radio and television service provider, not to be a state-owned company. The idea of creating this figure was to provide programming grids with a percentage of media products - for a total of seven hours a day, four of which must be PNI productions - to diversify production sources, but, above all, to provide quality content made in the country. Thus, products that include capital, locations, scripts, performers, directors and production staff, as well as Venezuelan technical personnel, and, especially, highlight the values of Venezuelan culture, are considered national productions. Cendrós and Ramírez (2011) point out that the figure of the PNI generated:

A forceful opening and democratization of radio and television production, this has given the opportunity to more than 1500 producers, registered with the Ministry of Communications and Information (MippCI), without any relation to the government and the mass media, to publish three hours of programming daily on national and regional television and radio stations. [...] It should be noted that the mission of independent production companies is simple: it is to take charge of a project such as audiovisual programs for cultural, educational, informative and recreational purposes, in order to contribute to the integral development of users, especially children and adolescents, these must be delivered practically finished, to save time and money for the media. [...] With the implementation of the aforementioned law, independent business activity is rapidly increasing, but an aspect that has been affecting the development of this activity is the inexperience in the creation, management and administration of programs in companies of this type (para.15).

While it is true that this legislation allowed for an important diversification of content, it also served as a strategy to control what to produce, how to produce it, when to broadcast and where to broadcast it. Content was not always of the expected quality, and in some cases, private channels opted to register some programs under this figure, thus neglecting their responsibilities in terms of generating content that would influence public opinion. On the other hand, this figure served to amplify the views and voices on social problems, in which perspectives in line with the projects framed by the principles of the so-called “Bolivarian Revolution” were very often favored. A clear example of this can be seen in Vive TV (Visión Venezuela), an open public television channel with a cultural and educational profile. Founded in 2003, it maintained an informative profile with reports, documentaries, news programs and, to a lesser extent, opinion programs.

In 2005, Vive TV, together with Venezolana de Televisión and the Ministerio de Comunicación e Información, launched a call for applications to:

To inform about the *Ley Resorte*, the participation mechanisms under discussion, the possibilities and mechanisms for participation in state channels, and a diagnostic tool of existing realities. A total of 400 projects were received, of which 30 were selected for co-production (around 30% from the interior of the country). [...] The idea was to prioritize thematic strengthening aimed at building a fairer society, in which the values of solidarity, integration, social organization, the culture of our peoples, among others, form the basis for an audiovisual result that explores new aesthetic and discursive possibilities towards socialism (Eekhout and Deronne, 2016, p. 195).

The programming generated under the figure of PNI and broadcast by public, private and community media is rarely related to serialised fiction of interest to Obitel. In the Venezuelan case, NIPs can obtain public or private resources for content production. Public funds come mainly from the Fondo de Responsabilidad Social derived from the Resorte-Me Law, but also from other entities and dependencies such as the Villa del Cine Foundation, attached to the Ministerio del Poder Popular para la Cultura y el Ministerio del Poder Popular para la Comunicación y la Información (MippCI).

The Social Responsibility Fund was created in 2006 and, to date, has financed a total of 642 projects, of which 593 have been aimed at the development and promotion of national production, 22 have been aimed at training national producers, 19 have been dedicated to research and 8 have been developed for training in critical perception (Conatel, 2022b).

In 2016, the CONATEL Audiovisual Gala was held, with the participation of Vepaco TV, Tves, VTV and Venevisión, to grant broadcasting rights to these public

and private channels. Seventeen works were previewed at the event, including seven series, four documentaries, two musicals and four children’s programs.

In mid-2022, the 17 projects funded during the years 2020-2021 were presented, some of which are shown below:

Name	Type	Transmission
1. <i>La Canción que nos Une</i>	Musical interview	Vive TV
2. <i>Hola tú, Hola yo</i>	Information packs	
3. <i>Willkommen, Señor Humbolt</i> (2021)	Documentary	
4. <i>Kaporito el Guardián de la Montaña</i> (2021)	Feature Film Animation	Circuito Cines Unidos
5. <i>Venezuela Heroica</i> (2021)	Educational packs	
6. <i>Gabriel y los Comemaiz</i> (2021)	Music video web series	TV y RRSS
7. <i>Descapada Cultural</i>	Cultural TV Programme	
8. <i>Leyendas Venezolanas</i> (2021)	Fiction	
9. <i>Big Bang</i> (2021)	Animation capsules	
10. <i>El Pacto: 30 Años de Lucha y Rocanrol</i> (2022)	Documentary	
11. <i>Operación Orión</i> (2021)	Feature Film Fiction	Circuito Cines Unidos

Source: Obitel Venezuela.

On the other hand, Conatel published a list of productions financed through the Fondo de Responsabilidad Social, without specifying the years in which they were released or the media through which they were exhibited. Of 44 registered productions, 39 are linked to audiovisual production and five to radio production. In terms of audiovisual production, two belong to humorous fiction series, one children’s telenovela and two fiction series aimed at celebrating patriotic heroes.

While little information is available on independent national productions financed with public funds, less information is available on content produced with private funds. Hence, it is necessary to carry out archaeological work to reconstruct this facet of Venezuelan audiovisual history. In this regard, it is worth noting that in 2022, Conatel insisted on the need to comply with the provisions of Article 15 of the *Resorte-Me* Law, according to which all radio and television service providers are obliged to submit during the first five days of each month, details of nationally produced programs, independent national production, times and percentages of concurrent elements, through the registration system that will serve for consultation and support, but at

the time of writing this report it was not possible to access it. The exact number of NIPs registered up to mid-2023 was not found, nor is there any data available on the independent production companies that existed before the enactment of the *Resorte-Me* Law.

In Venezuela, during 2022, no independent production company produced serialised fiction contents for broadcast signal, therefore, there was no export either. Independent production companies, as well as natural persons who produce, have two alternatives to produce fiction content in the country. The first is with foreign capital and the second through public funds. In the first case, there is the guarantee that its partner and/or investor will circulate the product in the international market. In the second, it has state resources, but must comply with the commitment to generate content approved by the governmental content control body, the state-owned Comisión Nacional de Telecomunicaciones (Conatel).

The same reality happened with the private channels that did not produce fiction during that year. The answer obtained by the different producers interviewed was the same: “There is none”. We explored, then, what were the reasons that left this gap in fiction production and we found that there is no economic muscle to invest in fiction, besides the producers mentioned that the equipment is obsolete, that the infrastructures are not conditioned, that is, there are no lights, cameras, microphones, etc., and that the indispensable equipment for production was old. In addition to this, suitable equipment has to be rented, which increases costs. The few producers did not consider it profitable to invest in fiction production and justified their decisions by citing the condition of the country, the blackouts, the lack of petrol, the transport problem and other no less important problems such as filming permits or the safety of the equipment in outdoor locations. These problems are compounded by political instability and make international alliances difficult. The independent production industry of fiction content in Venezuela does not have the means and strategies to export its products. We know of the case of *Dealers*, a series premiered in 2021, which, not having found a buyer, they decided to broadcast it on YouTube with reasonable success. In 2022, the producers of *Dealers* went into post-production, but did not broadcast or export. A similar number of independent producers went into the manufacture of foreign commercials, as the production costs of commercials for other countries are highly profitable for both the client and the domestic producer. Other producers have recorded entertainment programs and have left fiction aside, according to them, for the time when the country changes.

The vice president of Venevisión, Manuel Fray Grijalba, pointed out that specialized workers such as cameramen, directors of photography, microphonists, make-up artists and costume designers have migrated and the new generations do not have adequate training to deal with the production of any television program.

The country's multifactorial crisis, which has been present for more than five decades, made it more difficult to produce television fiction material. The only possible way out was to rely on foreign investment, negotiations for which are approaching. In 2022, some projects were conceived that could materialize in 2023. People linked to national free-to-air television consider that the normalization of the industry will take three to four years.

A curious fact about the export of fiction, although not from independent producers, is that the free-to-air channel Venevisión has managed to sell its video library, which has titles dating back to 1990, at competitive prices on the international market. Buyers are to be found in Africa, Asia and South America.

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PART III

TECHNICAL DATA SHEETS FOR THE TOP TEN TV

FICTION IN OBITEL COUNTRIES

TECHNICAL DATA FOR THE *TOP TEN*

ARGENTINA

1. *El Primero de Nosotros*

Production: Viacom Studios (Argentina/ US)

Direction: Pablo Vásquez, Pablo Ambrosino

Script: Ernesto Korovsky, Romina Moretto, Micaela Libson, Juan Ciuffo

Cast: Benjamín Vicuña, Paola Krum, Luciano Castro, Jorgelina Aruzzi, Damián De Santo

Exhibit date (in 2022): 21/03 to 30/06

2. *La 1-5/18. Somos Uno*

Production: Pol-ka (Argentina)

Direction: Jorge Nisco, Alejandro Ibáñez

Script: Lily Ann Martin, Marcelo Nacci, Jessica Valls

Cast: Gonzalo Heredia, Agustina Cherri, Esteban Lamothe

Exhibit date (in 2022): 03/01 to 25/03

3. *Dulce Ambición*

Production: Globo (Brazil)

Direction: Luciano Sabino

Script: Márcio Haiduck, Nelson Nadotti, Vinícius Vianna

Cast: Juliana Paes, Marcos Palmeira, Paolla Oliveira, Sérgio Guizé

Exhibit date (in 2022): 03/01 to 07/03

4. *El Encargado*

Production: Pegsa Group for Star+ (Argentina)

Direction: Mariano Cohn, Gastón Duprat, Jerónimo Carranza, Diego Bliffeld

Script: Leonardo Di Cesare, Alejandro Angelini, Jerónimo Carranza, Mariano Cohn, Gastón Duprat

Cast: Guillermo Francella, Gabriel Goity, Moro Anghileri, Gastón Cocchiarale, Pochi Ducasse

Exhibit date (in 2022): 28/10 (one episode)

5. Génesis. *El Origen de Todo*

Production: RecordTV, Casablanca (Brazil)

Direction: Edgard Miranda, Leonardo Miranda, Carlos Magalhães, Carlo Milani

Script: Camilo Pellegrini, Raphaela Castro, Stephanie Ribeiro

Cast: Zé Carlos Machado, Adriana Garambone, Carlo Porto, Juliana Boller, Oscar Magrini

Exhibit date (in 2022): 31/10 to 30/12

6. *Santa Evita*

Production: Non Stop, Ventanarosa for Star+ (Argentina)

Direction: Rodrigo García Barcha, Alejandro Maci

Script: Marcela Guerty, Pamela Rementería

Cast: Natalia Oreiro, Ernesto Alterio, Darío Grandinetti, Diego Velázquez, Francesc Orella

Exhibit date (in 2022): 30/07 (one episode)

7. *Los Protectores*

Production: Kapow for Star+ (Argentina)

Direction: Marcos Carnevale

Script: Adrián Suar, Marcos Carnevale

Cast: Adrián Suar, Andrés Parra, Gustavo Bermúdez, Jorgelina Aruzzi, Mercedes Scápola

Exhibit date (in 2022): 07/03 and 08/03 (two episodes)

8. *Robo Mundial*

Production: Full Frame, Pampa Films, Gloriamundi para Star+ (Argentina)

Direction: Gabriel Nicoli

Script: Gabriel Nicoli, Jesús Bracerías, Marcela Guerty, Martín Caamaño

Cast: Joaquín Furriel, Benjamín Amadeo, Carla Quevedo

Exhibit date (in 2022):

11/11 (one episode)

9. *Supernova*

Production: Kapow, Grupo Octubre for Amazon Studios (Argentina)

Direction: Ana Katz, Juan Fernández Gebauer

Script: Ana Katz, Daniel Katz

Cast: Ruggero Pasquarelli, Carolina Kopelioff, Johanna Chiefo, Nancy Dupláa, Inés Estévez

Exhibit date (in 2022): 08/07 to 29/07

10. *El Híncha*

Production: GM Comunicación,
Grupo Octubre, Flow (Argentina)

Direction: Alejandro Ciancio

Script: Nicolás Allegro, Daniel Aramayo, Sabrina Blanco

Cast: Victorio D'Alessandro, Luis Machín, Martín Slipak, Silvina Acosta, Malena Villa

Exhibit date (in 2022): 12/10 to 16/11

TECHNICAL DATA SHEETS FOR THE BRAZIL TOP TEN

1. *Amor de Mãe*

Production: Globo

Direction: José Luiz Villamarim

Script: Manuela Dias

Cast: Regina Casé, Adriana Esteves, Taís Araújo, Murilo Benício, Vladimir Brichta, Irandhir Santos, Chay Suede, Jéssica Ellen

Exhibition date (in 2021): March 15th to April 9th

2. *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 2021): January 1st to March 13th

3. *Império Special Edition*

Production: Globo

Direction: Rogério Gomes

Script: Aguinaldo Silva

Cast: Alexandre Nero, Lília Cabral, Leandra Leal, Drica Moraes, Marjorie Estiano, José Mayer, Paulo Betti, Caio Blat

Exhibition date (in 2021): April 12th to December 5th

4. *Salve-se Quem Puder*

Production: Globo

Direction: Marcelo Travesso, Fred Mayrink

Script: Daniel Ortiz

Cast: Deborah Secco, Juliana Paiva, Vitória Strada, Rafael Cardoso, João Baldasserini, Felipe Simas, Thiago Fragoso, Guilhermina Guinle, Flávia Alessandra

Exhibition date (in 2021): May 17th to July 16th

5. 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 Petrágia, Marcos Pitombo

Exhibition date (in 2021): January 1st to March 19th

6. Pega-Pega Special Edition

Production: Globo

Direction: Marcus Figueiredo, Luiz Henrique Rios

Script: Claudia Souto

Cast: Mateus Solano, Camila Queiroz, Marcelo Serrado, Mariana Santos, Irene Ravache, Marcos Caruso, Elizabeth Savalla, Vanessa Giácomo

Exhibition date (in 2021): July 19th to November 19th

7. Um Lugar ao Sol

Production: Globo

Direction: André Câmara, Maurício Farias

Script: Lícia Manzo

Cast: Cauã Reymond, Alinne Moraes, Andréia Horta, Juan Paiva, Andrea Beltrão, Gabriel Leone, Marieta Severo, Daniel Dantas

Exhibition date (in 2021): November 8th to December 31st

8. A Vida da Gente Special Edition

Production: Globo

Direction: Jayme Monjardim e Fabrício Mamberti

Script: Lícia Manzo

Cast: Fernanda Vasconcellos, Marjorie Estiano, Rafael Cardoso, Thiago Lacerda, Ana Beatriz Nogueira, Paulo Betti, Regiane Alves, Maria Eduarda de Carvalho

Exhibition date (in 2021): March 1st to August 6th

9. Flor do Caribe Special Edition

Production: Globo

Direction: Leonardo Nogueira

Script: Walther Negrão

Cast: Henri Scriptelli, Grazi Massafera, Igor Rickli, Sérgio Mamberti, Duda Mamberti, Suzana Pires, Cláudia Netto, Cacá Amaral

Exhibition date (in 2021): January 1st to February 26th

10. *Laços de Família Rerun*

Production: Globo

Direction: Ricardo Waddington

Script: Manoel Carlos

Cast: Vera Fischer, Tony Ramos, Carolina Dieckmann, Reynaldo Gianecchini, Marieta Severo, José Mayer, Deborah Secco, Lília Cabral

Exhibition date (in 2021): January 1st to April 2nd

TECHNICAL DATA SHEETS FOR THE CHILE TOP TEN

1. *La Ley de Baltazar* (Mega)

Production: Chilefilms

Direction: Nicolás Alemparte

Script: Daniella Castagno and Rodrigo Bastidas

Cast: Francisco Reyes, Amparo Noguera, Gabriel Cañas, Daniela Ramírez, Simón Pešutić, Francisca Imboden.

Exhibition dates (in 2022): June/07 to December/29

2. *Pobre Novio* (Mega)

Production: Quena Rencoret (Mega), Daniela Demicheli (Mega), Vania Portilla (Chilefilms)

Direction: Matías Stagnaro, Bárbara Della Schiava

Script: Alejandro Cabrera (creador), Larissa Contreras, José Fonseca and Valeria Vargas.

Cast: Etienne Bobenrieth, Montserrat Ballarin, Diego Muñoz, Francisca Walker, Hector Noguera, Luz Valdivieso, Sigrid Alegría, Carolina Arregui, Claudio Arredondo, Claudio Castellón

Exhibition dates (in 2022): January/03 to June/07

3. *Hijos del Desierto* (Mega)

Production: Patricio López, Pablo Ávila (Mazal Producciones)

Direction: Patricio González Kuhlmann

Script: Rodrigo Cuevas, Patricio Heim, Simón Soto

Cast: Gastón Salgado, Jorge Arecheta, María José Weigel, Francisco Melo, Paola Volpato

Exhibition dates (in 2022): August/23 to December/29

4. *Amar Profundo* (Mega)

Production: Quena Rencoret, Patricio López, Pablo Díaz, Patricia Encina (Mega), Verónica Brañes (DDRío)

Direction: Víctor Huerta, Nicolás Alemparte, María Belen Arenas

Script: Sergio Díaz, Marcelo Castañón, Valentina Pollarolo, Fernanda Vivado

Cast: María Gracia Omegna, Nicolás Oyarzún, Josefina Montané, Pedro Campos,

Elisa Zulueta, Jorge Arecheta

Exhibition dates (in 2022): January/03 to August/24

5. *Verdades Ocultas* (Mega)

Production: Chilefilms (Chile)

Direction: Felipe Arratia, Manuel Buch, Pablo Aedo, Víctor Huerta, Claudio López de Lérda

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 dates (in 2022): January/03 to June/22

6. *Hasta Encontrarte* (Mega)

Production: Daniela Demicheli, Vania Portilla, Claudia Cazanave

Direction: Víctor Huerta

Script: Ximena Carrera, Luis Emilio Guzmán

Cast: Luz Valdivieso, Daniel Alcaíno, Sigrid Alegría, Alejandro Trejo, Coca Guazzini, César Sepúlveda.

Exhibition dates (in 2022): June/22 to December/12

7. *Suerte de Vivir* (Mega)

Production: Rede Globo

Direction: Luiz Henrique Rios

Script: Rosane Svartman, Paulo Halm, Charles Peixoto, Claudia Sardinha, Fabrício Santiago, Felipe Cabral, Isabela Aquino

Cast: Grazi Massafera, Rômulo Estrela, David Juner, Antônio Fagundes, Ingrid Guimarães, Fabiula Nascimento, Armando Babaioff, Sheron Menezes

Exhibition dates (in 2022): May/11 to November/08

8. *Dulce Ambición* (Mega)

Production: Rede Globo

Direction: Luciano Sabino, Amora Mautner

Script: Márcio Haiduck, Nelson Nadotti, Vinícius Vianna

Cast: Juliana Paes, Marcos Palmeira, Agatha Moreira, Paolla Oliveira, Nathalia Dill, Sérgio Guizé, Caio Castro

Exhibition dates (in 2022): January/03 to April/18

9. *Días Mejores* (CHV)

Production: Viacom International Studios and Zeta Studios (empresas). Antonio Asensi, Paloma Molina

Direction: Alejo Flah, Arantxa Echevarría, Jota Linares

Script: Cristóbal Garrido, Adolfo Valor, Daniel Martín Serrano, Sara Alquézar, Alba Carballal

Cast: Blanca Portillo, Francesc Orella, Marta Hazas, Erick Elías and Alba Planas.

Exhibition dates (in 2022): May/06

10. *Huérfanos de su Tierra* (Mega)

Production: Rede Globo

Direction: André Câmara

Script: Aimar Labaki, Carolina Ziskind, Cristina Biscaia, Dora Castellar

Cast: Julia Dalavia, Renato Góes, Herson Capri, Alice Wegmann, Carmo Dalla Vecchia and Anujú Dorigon, Rodrigo Simas, Emanuelle Araújo, Danton Mello, Kaysar Dadour, Eli Ferreira, Ana Cecília Costa, Marco Ricca, Carol Castro, Eliane Giardini and Paulo Betti.

Exhibition dates (in 2022): December/12 to December/30

TECHNICAL DATA SHEETS FOR THE ECUADOR TOP TEN

1. *Arelys Henao, canto para no llorar*

Production: Caracol (Colombia)

Direction: Andrés López Pacha y Liliana Bocanegra

Script: María Alejandra Henao, Ángela Milena Ardila

Cast: Mariana Gómez, José Ramón Barreto, Yuri Vargas, Anderson Ballesteros, Juan Sebastián Calero

Exhibition Date (in 2022): 11/01 a 08/04

2. *Las Villamizar*

Production: Caracol (Colombia)

Direction: Mateo Stivelberg, Herney Luna

Script: Juan Carlos Aparicio, Mateo Stivelberg

Cast: Shany Nadan, María José Vargas, Estefanía Piñeres

Exhibition Date (in 2022): 18/04 a 02/08

3. *Hasta que la plata nos separe*

Production: RCN (Colombia)

Direction: Israel Sánchez, Olga Lucía Rodríguez

Script: Juan Carlos Pérez Flores, Patricia Rodríguez

Cast: Carmen Villalobos, Sebastián Martínez

Exhibition Date (in 2022): 10/05 a 16/09

4. *Leandro Díaz*

Production: RCN (Colombia)

Direction: Víctor Cantillo, Felipe Paredes, Juan Carlos Mazo

Script: Juan Sebastián Granados, Rafael Noguera, Cecilia Percy

Cast: Silvestre Dangond, Laura de León

Exhibition Date (in 2022): 19/09 a 09/12

5. *El Rey. Vicente Fernández*

Production: Caracol (Colombia)

Direction: Conrado Martínez, Fernando Urdapilleta

Script: Dago García, Jhonny Alexander Ortiz

Cast: Jaime Camil, Sebastián Dante, Sebastián García, Kaled Acab, Marcela Guirado, Regina Pavón
Exhibition Date (in 2022): 03/08 a 16/09

6. *La desalmada*

Production: Televisa (México)
Direction: Salvador Garcini, Fez Noriega
Script: Julián Aguilar, Isabel de Sara, Janely Lee, Fabiola López Neri
Cast: Livia Brito, José Ron, Eduardo Santamarina, Marjorie de Sousa, Marlene Favela
Exhibition Date (in 2022): 28/03 a 09/12

7. *Te la dedico*

Production: RCN (Colombia)
Direction: Víctor Cantillo, Mauricio Cruz
Script: Juan Andrés Granado
Cast: Diana Hoyos, Pipe Bueno, Álvaro Bayona, Marcela Gallego, Andrés Suárez, Valerie Domínguez
Exhibition Date (in 2022): 08/02 a 18/07

8. *Dejémonos de Vargas*

Production: RCN (Colombia)
Direction: Israel Sánchez, Santiago Vargas
Script: Guido Jácome, Dany Alejandro Hoyos
Cast: Carlos Camacho, Margarita Muñoz, Emmanuel Saldarriaga, Aco Pérez, Nataly Umaña
Exhibition Date (in 2022): 13/07 a 09/12

9. *Te acuerdas de mi*

Production: Televisa (México)
Direction: Francisco Franco, Rubén Nelhiño Acosta
Script: Paulina Barros, Pablo Aramendi, Gabriela Rodríguez, Larissa Andrade, Fernando Ábrego
Cast: Gabriel Soto, Fátima Molina, Guillermo García Cantú, Juan Carlos Barreto, Marisol del Olmo
Exhibition Date (in 2022): 11/05 a 02/09

TECHNICAL DATA SHEETS FOR THE MÉXICO TOP TEN

1. *Los Ricos también Lloran*

Production: TelevisaUnivision

Direction: Luis Manzo, Pavel Vázquez, Carlos Santos.

Script: Marisel Lloberas, Fermín Zúñiga, Daniela Richer.

Cast: Sebastián Rulli, Claudia Martín, Azela Robinson, Víctor González.

Exhibition date: 02/21 to 05/13 from Monday to Friday.

2. *La Rosa de Guadalupe*

Production: Televisa

Direction: Martha Luna, Eduardo Said, Lorena Maza.

Script: Carlos Mercado.

Cast: Several actors from CEA.

Exhibition date: 01/01 to 12/31 from Monday to Friday.

3. *El Último Rey. El Hijo del Pueblo*

Production: Televisa

Direction: Eric Morales, Alan Coton.

Script: Juan Osorio, Martha Jurado.

Cast: Pablo Montero, Angélica Aragón, Iliana Fox, Jesús Moré, Iván Arana, Emilio Osorio.

Exhibition date: 03/13 to 06/10 from Monday to Friday.

4. *La Madrastra*

Production: TelevisaUnivision

Direction: Sergio Cataño, Héctor Márquez.

Script: Rosa Salazar Arena, Ricardo Tejeda, Fermín Zúñiga, Anthony Martínez, Juan Carlos Tejeda.

Cast: Araceli Arámbula, Andrés Palacios.

Exhibition date: 08/15 to 10/21 from Monday to Friday.

5. *La Herencia*

Production: TelevisaUnivision

Direction: Sandra Shiffner, Aurelio Ávila,

Script: Jaime Sierra, Helena Aguilera, Hugo Moreno Cano.
Cast: Michelle Renaud, Matías Novoa, Emmanuel Palomares, Tiaré Scanda.
Exhibition date: 03/28 to 07/14 from Monday to Friday.

6. *Mi Camino es Amarte*

Production: TelevisaUnivision
Direction: Isaías Gómez, Alejandro Gamboa.
Script: Rosa Salazar Arenas, Julián Aguilar, Rubén Núñez.
Cast: Susana González, Gabriel Soto, Mark Tacher, Ximena Herrera.
Exhibition date: 07/11 to 12/13 from Monday to Friday.

7. *Vencer la Ausencia*

Production: TelevisaUnivision
Direction: Benjamín Cann, Fernando Nesme.
Script: Alejandra Romero Meza, Humberto Robles, Luis Fernández de Gamboa, Daniela Ochoa, Cecilia Oviedo, Claudia Caro Cabello.
Cast: Ariadne Díaz, Mayrín Villanueva, David Zepeda, Danilo Carrera, Alejandra Barros, Alexis Ayala, Jesús Ochoa, Mariana Garza.
Exhibition date: 07/18 to 11/04 from Monday to Friday.

8. *Cabo*

Production: TelevisaUnivision
Direction: Salvador Garcini, Fez Noriega.
Script: Carlos Daniel González, Fernando Garcilita, Fabiola López Neri, Claudia Manzano.
Cast: Bárbara de Regil, Marías Novoa.
Exhibition date: 10/24/2022 to 02/17/2023 from Monday to Friday.

9. *Amor Dividido*

Production: TelevisaUnivision
Direction: Sergio Cataño, Luis Eduardo Reyes.
Script: Fermín Zúñiga. Rosa Salazar Arenas, Rossana Ruiz.
Cast: Eva Sedeño, Gabriel Soto, Arturo Peniche.
Exhibition date: 01/17 to 06/12 from Monday to Friday.

10. *Mujer de Nadie*

Production: TelevisaUnivision
Direction: Fabián Corres, Juan Pablo Blanco.
Script: José Ramón Menéndez.
Cast: Livia Brito, Marcus Ornellas, Arap Bethke.
Exhibition date: 06/13 to 08/12 from Monday to Friday.

TECHNICAL DATA SHEETS FOR THE SPAIN TOP TEN

1. *Entrevías*

Production: Alea Media, Mediaset (Spain)

Direction: Aitor Gabilondo, David Bermejo, Ignacio Mercero, Oriol Ferrer, Luis Oliveros

Script: David Bermejo, Aitor Gabilondo

Cast: José Coronado, Luis Zahera, Felipe Londoño, Nona Sobo, Jordi Sánchez, Laura Ramos, Manuel Tallafé, Manolo Caro, Itziar Atienza, Franky Martín

Exhibition date (in 2022): 02/01 to 05/17

2. *Alba*

Production: Boomerang TV, Atresmedia (Spain)

Direction: Pablo Guerrero, Carlota Martínez-Pereda, Carlos Martín, Ignasi Rubio, Humberto Miró

Script: Irma Correa, Susana López, Javier Holgado y Carlos Vila

Cast: Elena Rivera, Jordi Ballester, Candela Cruz, Jason Fernández, Miquel Fernández, Antonio Gil, Pepa Gracia, Pol Hermoso, Franky Martín, Caterina Mengs

Exhibition date (in 2022): 03/09 to 06/01

3. *Los misterios de Laura*

Production: Vernada, RTVE (Spain)

Direction: Pablo Guerrero

Script: Javier Holgado, Carlos Vila

Cast: María Pujalte, Raúl Mérida, Laura Pamplona, Oriol Tarrasón, Beatriz Carvajal, César Camino, Joaquín Climent, Fran Cantos

Exhibition date (in 2022): 01/13

4. *Cuéntame cómo pasó*

Production: Grupo Ganga Producciones, RTVE (Spain)

Direction: Agustín Crespi, Antonio Cano, Irene Arzuaga, Abigail Schaaff, Sergio Barrejón

Script: Sergio Barrejón, Jacobo Delgado, Sonia Sánchez, Laura León Varea, Manu Dios, Tirso Calero, Ángela Armero

Cast: Imanol Arias, Ana Duato, María Galiana, Pablo Rivero, Irene Visedo, Carmen Climent, Paloma Bloyd

Exhibition date (in 2022): 01/14 to 06/16

5. *Amar es para siempre*

Production: Diagono TV (Spain)

Direction: Eduardo Casanova

Script: Ángel Agudo, Bárbara Alpuente, Julia Altares, Tirso Conde

Cast: Itziar Miranda, Manuel Baqueiro, José Antonio Sayagués, Melani Olivares, Jorge Bosch, Luz Valdenebro, Adelfa Calvo, Toni Sevilla

Exhibition date (in 2022): 01/04 to 12/30

6. *Fuerza de paz*

Production: Alea Media, RTVE (Spain)

Direction: Aurora Guerrera

Script: Mar Olid, Jorge Saavedra

Cast: Silvia Alonso, Toni Engonga, Martiño Rivas, Alfonso Bassave, Iria del Río, Félix Gómez, Alain Hernández, Will Shephard, Carlos Serrano

Exhibition date (in 2022): 12/14 to 12/22

7. *Sequía*

Production: Atlantia Media (Spain)

Direction: Joaquín Llamas

Script: Arturo Ruiz, Daniel Corpas

Cast: Miguel Ángel Muñoz, Elena Rivera, Myriam Gallego, Rodolfo Sancho, Fernando Andina, Marco d'Almeida, Guilherme Filipe

Exhibition date (in 2022): 01/18 to 03/04

8. *Dos vidas*

Production: Bambú Producciones, RTVE (Spain)

Direction: Miguel Conde, Giselle Llanio, Pedro Martínez Cifuentes, Mario Montero

Script: Alba Lucio, Sivia Arribas, Josep Cister Rubio, Irene Rodríguez

Cast: Amparo Piñeiro, Laura Ledesma, Cristina de Inza, Sebastián Haro, Silvia Acosta, Oliver Ruano, Aida de la Cruz, Iván Mendes

Exhibition date (in 2022): 01/25 to 02/08

9. *Servir y proteger*

Production: Plano a plano, RTVE (Spain)

Direction: Alexandra Graf, Inma Torrente, Luis Arribas, Nacho Guilló, Marcos Hernández

Script: Dionisio Pérez, Roberto Goñi, Fran Carballal

Cast: Luisa Martín, Roberto Álvarez, Thais Blume, Alberto Jiménez, Natalia Rodríguez, Mamen Camacho, Jimmy Castro, Juan Díaz

Exhibition date (in 2022): 01/04 to 07/30

10. *Fuego cruzado*

Production: BBC, RTVE, Dancing Ledge, Buddy Club, Sur Film (Spain y Reino Unido)

Direction: Tessa Hoffe

Script: Louise Doughty

Cast: Keeley Hawes, Hugo Silva, Alba Brunet, Guillermo Campra, Josette Simon, Anneika Rose, Lee Ingleby, Daniel Ryan

Exhibition date (in 2022): 11/30 to 12/01

TECHNICAL DATA SHEETS FOR THE USA TOP TEN

1. *La Desalmada*

Production: TelevisaUnivision (Mexico)*

Director: Salvador García, Fez Noriega

Screenplay: Alejandro Torres, Guido Jacome, Felipe Forero

Cast: Livia Brito, Jose Ron, Eduardo Santamarina, Marjorie de Sousa, Marlene Favela

Exhibition dates (in 2022): (01/03 to 01/10)

2. *Vencer el Pasado*

Production: TelevisaUnivision (Mexico)*

Director: Benjamín Cann, Fernando Nesme

Screenplay: Humberto Robles, Gerardo Pérez, Luis Gamboa, Cecilia Oviedo, Laura Caro

Cast: Angelique Boyer, Sebastián Rulli, Erika Buenfil, África Zavala, Manuel Ibáñez, Leticia Perdigón.

Exhibition dates (in 2022): (01/03 to 02/15)

3. *Mi Fortuna es Amarte*

Production: TelevisaUnivision (Mexico)*

Director: Isaías Gómez, Alejandro Gamboa

Screenplay: Alejandra Díaz, José Rubén Núñez, María del Pilar Pedroza

Cast: Susana González, David Zepeda, Sergio Sendel, Chantal Andere

Exhibition dates (in 2022): (02/21 to 07/08)

4. *¿Qué le Pasa a mi Familia?*

Production: TelevisaUnivision (Mexico)*

Director: Aurelio Ávila, Azela Robinson, Bonnie Cartas

Screenplay: Jaime Sierra, Hugo Moreno, Martha Jurado

Cat: Diana Bracho, Cesar Évora, Julián Gil, Gabriela Platas, Emilio Osorio

Exhibition dates (in 2022): (01/03 to 01/25)

5. *Mi Camino es Amarte*

Production: TelevisaUnivision (Mexico)*

Director: Isaías Gómez, Alejandro Gamboa

Screenplay: Inés Rodena, Rosa Zalazar Arenas, Julián Aguilar, Rubén Núñez

Cat: Gabriel Soto, Susana González, Mark Tacher, Ximena Herrera

Exhibition dates (in 2022): (11/15 to 12/30)

6. *Los Ricos También Lloran*

Production: TelevisaUnivision, Studios W (Mexico)*

Director: Luis Manzo, Pavel Vázquez, Carlos Santos

Screenplay: Marisel Lloberas, Fermín Zúñiga, Daniela Richer

Cast: Sebastián Rulli, Claudia Martin, Fabiola Guajardo, Azela Robinson, Víctor González, Guillermo García Cantú.

Exhibition dates (in 2022): (09/06 to 11/14)

7. *Soltero con Hijas*

Production: TelevisaUnivision (Mexico)*

Director: Aurelio Ávila, Bonnie Cartas

Screenplay: Hugo Moreno, Juan Osorio, Helena Aguilar, Martha Jurado, Jaime Sierra

Cast: Gabriel Soto, Vanessa Guzmán, Maryín Villanueva, María Sorté, Pablo Montero, Laura Flores, Carlos Mata

Exhibition dates (in 2022): (01/24 to 05/30)

8. *Vencer la Ausencia*

Production: TelevisaUnivision (Mexico)*

Director: Benjamín Cann, Fernando Nesme

Screenplay: Alejandro Romero, Humberto Robles, Luis Fernández, Daniela Ochoa, Cecilia Oviedo, Claudia Caro

Cast: Ariadne Diaz, Maryín Villanueva, David Zepeda, Danilo Cabrera, Alejandra Barros, Alexis Ayala, Jesús Ochoa, Mariana Garza

Exhibition dates (in 2022): (10/25 to 12/30)

9. *La Herencia, Legado de Amor*

Production: TelevisaUnivision (Mexico)*

Director: Aurelio Ávila, Sandra Schiffner

Screenplay: Jaime Sierra, Helena Aguilera, Hugo Moreno, Juan Osorio, Claudia Vázquez, Gustavo Suárez, Martha Jurado

Cast: Michelle Renaud, Matías Novoa, Emmanuel Palomares, Mauricio Henao, Daniel Elbittar, Juan Pablo Gil

Exhibition dates (in 2022): (07/11 to 10/24)

10. *La Madrastra*

Production: TelevisaUnivision (Mexico)*

Director: Sergio Cataño, Héctor Márquez

Screenplay: Rosa Zalazar Arenas, Ricardo Tejeda, Fermín Zúñiga, Anthony Martínez, Juan Carlos Tejeda

Cast: Araceli Arámbula, Andrés Palacios, Marisol Del Olmo, Cecilia Gabriela, Martha Julia, Juan Martín Jauregui, José Elías Moreno, Adrián Di Monti

Exhibition dates (in 2022): (10/17 to 12/30)

* The producer is TelevisaUnivision a binational company with corporate addresses and infrastructure in the USA and Mexico. The decision to mark the production as Mexican, because these fiction and done in that country with the Mexican domestic market in mind, however, the USA Hispanic market is always the second “domestic” market for this content.

TECHNICAL SHEETS OF THE TOP TEN URUGUAY

1. *Si Nos Dejan*

Production: Televisa-Univisión

Direction: Luis Manzo, Carlos Cock Marín

Pavel Vázquez

Script: Vicente Albarracín, Carlos Eloy Castro

Valentina Sequera, Karla Saíenz de la Peña

Cast: Mayrín Villanueva, Marcus Ornellas, Alexis Ayala, Alexis Ayala, Scarlet Gruber and Solkin Ruz (protagonists)

Exhibition date (in 2022):

03/14/2022-07/29/2022 from Monday to Friday.

2. *Corazón De Madre*

Production: Globo

Direction: José Luiz Villamarim

Script: Mariana Mesquita, Roberto Vitorino,

Walter Daguerre

Cast: Regina Casé, Adriana Esteves, Taís Araújo, Humberto Carrão, Isis Valverde, Juliano Cazarré, Vladimir Brichta, Murilo Benício, Nanda Costa and Paulo Gabriel (protagonists)

Exhibition date (in 2022):

01/03/2022-03/16/2022 from Monday to Friday.

3. *Sol Naciente*

Production: Globo

Direction: Leonardo Nogueira

Script: Walther Negrão, Suzana Pires, Júlio Fischer

Cast: Giovanna Antonelli and Bruno Gagliasso, with the antagonistic participations of Laura Cardoso, Rafael Cardoso, Rafael Zulu, Malvino Salvador and Maria Joana (protagonists)

Exhibition date (in 2022):

04/25/2022-10/14/2022 from Monday to Friday.

4. *Éramos Seis*

Production: Globo

Direction: Pedro Peregrino, Carlos Araújo

Script: Bernardo Guilherme, Daisy Chaves, Juliana Peres

Cast: Glória Pires, Nicolas Prattes, Danilo Mesquita, Giullia Buscacio, André Luiz Frambach, Cássio Gabus Mendes, Susana Vieira and Joana de Verona (protagonists)

Exhibition date (in 2022):

01/03/2022-03/11/2022 from Monday to Friday.

5. *Solo Se Vive Dos Veces*

Production: Globo

Direction: Pedro Brenelli, Allan Fiterman

Script: Marcelo Gonçalves, Mariana Torres, Rodrigo Salomão

Cast: Giovanna Antonelli, Vladimir Bricht,

Mateus Solano, Valentina Herszage, Júlia Lemmertz, Bruno Cabrerizo, Ana Hikari and Ana Lúcia Torre (protagonists)

Exhibition date (in 2022):

12/19/2022-12/30/2022 from Monday to Friday.

6. *Rock Story*

Production: Globo

Direction: Dennis Carvalho, Maria de Médicis

Script: Maria Helena Nascimento

Cast: Vladimir Brichta, Nathalia Dill, Alinne Moraes, Rafael Vitti, João Vicente de Castro, Viviane Araújo, Nicolas Prattes, Caio Paduan, Herson Capri, Lorena Comparato, João Vítor Silva, Paulo Betti, Alexandra Richter, Ana Beatriz Nogueira and Marina Moschen (protagonists)

Exhibition date (in 2022):

03/14/2022-08/19/2022 from Monday to Friday.

7. *Los Ricos También Lloran*

Production: Televisa-Univisión

Direction: Luis Manzo, Carlos Santos, Pavel Vazquez

Script: Esther Feldman, Marisel Lloberas, Daniela Richer, Inés Rodena, Rosa Salazar Arenas, Fermín Zúñiga

Cast: Claudia Martín, Sebastián Rulli, Fabiola Guajardo, Azela Robinson and Víctor González (protagonists)

Exhibition date (in 2022):

10/17/2022-12/30/2022 from Monday to Friday.

8. *La Usurpadora*

Production: Televisa-Univisión

Direction: Francisco Franco, Rubén Nelhiño Acosta

Script: Tania Tinajero Reza, Jacques Bonnavent, Javier Van de Couter, Levinton Sol, Gabriela Rodríguez

Cast: Sandra Echeverría, Andrés Palacios, Arap Bethke (protagonists)

Exhibition date (in 2022): 01/03/2022-01/24//2022 from Monday to Friday.

9. *Orgullo Y Pasión*

Production: Globo

Direction: Fred Mayrink

Script: Marcos Bernstein

Cast: Nathalia Dill, Thiago Lacerda, (protagonists) Natália do Vale, Alessandra Negrini, Grace Gianoukas, Oscar Magrini, Ricardo Tozzi, Bruno Gissoni, Christine Fernandes (protagonists)

Exhibición date (in 2022): 08/22/2022- 12/30/2022 from Monday to Friday.

10. *Corran Por Sus Vidas*

Production: Globo

Direction: Fred Mayrink, Marcelo Travesso

Script: Flávia Bessone, Nilton Braga,

Pedro Neschling, Gabriela Miranda, Bruno Segadilha, Victor Atherino

Cast: Deborah Secco, Juliana Paiva, Vitória Strada, with Flávia Alessandra, Rafael Cardoso, João Baldasserini, Felipe Simas, Rodrigo Simas, Thiago Fragoso, Bruno Ferrari (protagonists).

Exhibition date (in 2022): 01/03/2022 - 04/22/2022 from Monday to Friday.

TECHNICAL DATA SHEETS FOR THE VENEZUELA TOP TEN

1. *Cartas del Corazón*

Production: Venevisión

Direction: Dayán Coronado

Screenplay: varios

Cast: varios

Exhibition date (in 2022): from 01/03 to present

2. *Tu Voz Estéreo*

Production: Caracol Televisión

Direction: Alfonso Peña

Screenplay: Ricardo Saldarriaga, Julio Castañeda

Cast: Catalina Aristizábal, Juan Pablo Espinosa, María José Martínez, Ítalo Londeros, Alejandro Estrada, Pedro Falla, Michelle Rouillard, Alejandra Buitrago, Lucas Buelvas, Tania Valencia

Exhibition date (in 2022): from 01/03 to present

3. *Totalmente Diva*

Production: Rede Globo

Direction: Luiz Henrique Rios

Screenplay: Rosane Svartman, Paulo Halm

Cast: Mariana Ruy Barbosa, Fábio Assunção, Felipe Simas, Juliana Paes

Exhibition date (in 2022): from 06/28 to present

4. *Si nos Dejan*

Production: W Studios

Direction: Luis Manzo, Carlos Cock Marín, Pavel Vázquez

Screenplay: Vicente Albarracín, Carlos Eloy Castro, Valentina Sequera, Karla Saíenz de la Peña, Doris Seguí

Cast: Mayrín Villanueva, Marcus Ornellas, Alexis Ayala, Scarlet Gruber Isabel Burr, Álex Perea

Exhibition date (in 2022): from 07/18 to 12/05

5. *Imperio*

Production: TV Globo

Direction: Rogério Gomes

Screenplay: Aguinaldo Silva

Cast: Alexandre Nero, Lília Cabral, Leandra Leal, Drica Moraes, Marjorie Estiano

Exhibition date (in 2022): from 06/04 to present

6. *Pecados Capitales*

Production: Caracol

Direction: Miriam de Flórez

Screenplay: Miriam de Flórez

Cast: Frank Ramírez, Marcela Carvajal, Patricia Castañeda, Teresa Gutiérrez, Chela del Río, Patrick Delmas, María José Martínez

Exhibition date (in 2022): from 03/21 to 09/29

7. *Las Amazonas*

Production: Venevisión

Direction: Grazio D'Angelo

Screenplay: César Miguel Rondón

Cast: Hilda Carrero, Eduardo Serrano, Alba Roversi, Corina Azopardo, Tony Rodríguez, José Oliva

Exhibition date (in 2022): from 01/24 to 08/29

8. *La Ley del Corazón*

Production: Rede Globo

Direction: Sergio Osorio, Víctor Mallarino

Screenplay: Ricardo Sarmiento, Felipe Agudelo, Natalia Santa

Cast: Luciano D'Alessandro, Laura Londoño, Sebastián Martínez, Iván López, Mabel Moreno, Lina Tejeiro, Rodrigo Candamil

Exhibition date (in 2022): from 05/17 to present

9. *El País de las Mujeres*

Production: Venevisión

Direction: Carlos Izquierdo

Screenplay: Leonardo Padrón, Mónica Montañez

Cast: Ana Karina Manco, Víctor Cámara, Jean Carlo Simancas, Viviana Gibelli, Carolina Perpetuo, Caridad Canelón.

Exhibition date (in 2022): from 01/04 to 09/23

OBITEL 2023

The new opportunities given by the digital media ecosystem, in production, distribution and exhibition of television fiction, have triggered new modalities of access and consumption in television content. Thus, the successful emergence of SVOD systems is having an important impact in television formats and their narrative strategies, which can be seen in broadcasting television, in cable television and in the digital platforms offering. Seriality has been a key component in the way the logics of television has been shaped since its origins, which in the context of a more competitive television ecology, this dimension has been challenged. The 2023 Yearbook has focused in particular in the analysis of independent producers and the internationalization of television fiction production in Ibero-America. Based in some common conceptual guidelines and observation criteria each country has study this aspect on their own productions.

The unified protocol has been maintained and it is focused in the monitoring of serial fiction distributed mainly through broadcasting television. However, the changes and technological advancements achieved in the last years, in relation to new forms of television content distribution, has resulted in the integration of the monitoring of streaming content of television fiction through VoD, as well as a brief following of the cable television networks and the audience behavior in digital environments. Therefore, each year our field of action is expanding without losing sight of our main goal: the observation of some of the variables in the process of production, circulation, and consumption of the television fictional serial content in Ibero-America.

