

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

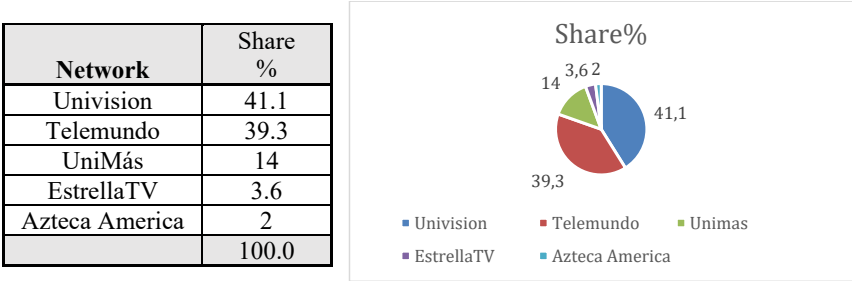
Table 1. National broadcasting Hispanic networks/channels in the United States

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.

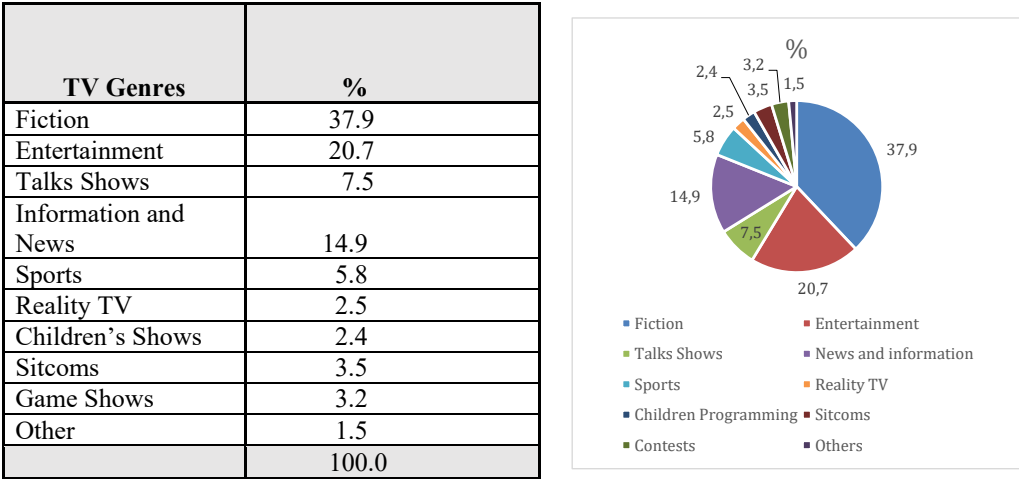
Graph 1. Ratings and TV shares by network



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
Universe	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	
1. <i>Diálogo de un Gigolo</i> (miniseries)	16. <i>La Desalmada</i> (telenovela, Mexico)*
2. <i>Malverde: El Santo Patrón</i> (telenovela)	17. <i>La Herencia</i> (telenovela, Mexico)*
	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)*
	25. <i>¿Qué le Pasa a mi Familia?</i> (telenovela, Mexico)*
Univision	26. <i>Renta Congelada</i> (Series/Sitcom, Mexico)*
7. <i>Amor en Navidad</i> (miniseries, USA-Mexico)	27. <i>La Rosa de Guadalupe</i> (unitary, Mexico)*
8. <i>Se Rentan Cuartos</i> (Series/Sitcom, USA-Mexico)	28. <i>S.O.S. Me Estoy Enamorando</i> (telenovela, Mexico)*
	29. <i>Soltero con Hijas</i> (telenovela)*
ORIGINAL FOREIGN TITLES -27	30. <i>¿Tu Qué Crees?</i> (Series/Sitcom, Mexico)*
Telemundo	31. <i>Ultimo Rey: Hijo del Pueblo 1 y 2</i> (telenovela, Mexico)*
9. <i>Hasta que la Plata nos Separe</i> (telenovela, Colombia)	32. <i>Una Familia de Diez</i> (Series/Sitcom, Mexico)*
	33. <i>Vecinos</i> (Series/Sitcom, Mexico)*
UniMás	34. <i>Vencer el Pasado</i> (telenovela, Mexico)*
10. <i>Esta Historia me Suena</i> (unitario, 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)	39. <i>Como Dice el Dicho</i> (unitario, Mexico)
13. <i>Amores con Trampa</i> (telenovela, Mexico)	40. <i>Fuerza de Creer</i> (series, Mexico)
14. <i>La C.Q.</i> (series, Mexico-Venezuela)	41. <i>Heridas del Amor</i> (telenovela, Mexico)
15. <i>Como Dice el Dicho</i> (unitario, Mexico)	42. <i>Peregrina</i> (telenovela, Mexico)
16. <i>Cómplices al Rescate</i> (series, Mexico)	43. <i>La Familia P. Luche</i> (Series/Sitcom, Mexico)
17. <i>Cuna de Lobos</i> (telenovela, Mexico)	44. <i>Los Gonzales</i> (Series/Sitcom, Mexico)
18. <i>Esta Historia me Suena</i> (unitario, Mexico)	45. <i>La Rosa de Guadalupe</i> (unitario, Mexico)
19. <i>La Fea mas Bella</i> (telenovela, Mexico)	46. <i>Las Tontas no van al Cielo</i> (telenovelas, Mexico)
20. <i>Fuego en la Sangre</i> (telenovela, Mexico)	47. <i>María de los Ángeles</i> (Series/Sitcom, Mexico)
21. <i>Fuerza del Destino</i> (telenovela, Mexico)	48. <i>Nosotros los Guapos</i> (Series/Sitcom, Mexico)
22. <i>Lo que la Vida me Robó</i> (telenovela, Mexico)	
23. <i>Mañana es para Siempre</i> (telenovela, Mexico)	EstrellaTV
24. <i>Mi Marido Tiene Familia</i> (telenovela, Mexico)	49. <i>Encrucijada</i> (series, Mexico)
25. <i>Mita y Mita</i> (Series/Sitcom, Mexico)	50. <i>Historias Delirantes</i> (series, Mexico)
26. <i>Nosotros los Guapos</i> (Series/Sitcom, Mexico)	
27. <i>Una Familia de Diez</i> (Series/Sitcom, Mexico)	Azteca America
28. <i>Vecinos</i> (Series/Sitcom, Mexico)	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.

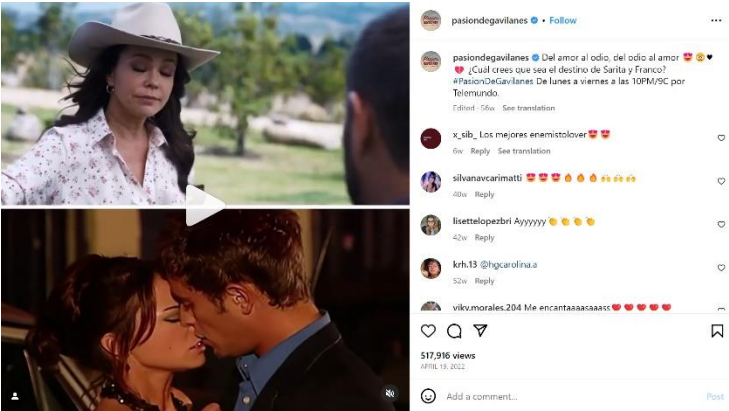
4.2. Social Participation

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+, Atrismediaplay,
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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