

IBERO-AMERICAN OBSERVATORY OF TELEVISION FICTION

OBITEL 2024

What is happening with narratives in Ibero-American television fiction?

General Coordinators: Maria Immacolata Vassallo de Lopes, Catarina Duff Burnay, Rosario Sánchez Vilela

Coordinator of this edition: Rosario Sánchez Vilela



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General coordinators: Maria Immacolata Vassallo de Lopes, Catarina Duff Burnay, Rosario Sánchez Vilela

Coordinator of this edition Rosario Sánchez Vilela

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editorialedicionesuc@uc.cl

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General Coordination: Maria Immacolata Vassallo de Lopes, Catarina Duff
Burnay, Rosario Sánchez Vilela

Coordinator of this edition: Rosario Sánchez Vilela

Comparative chapter: Charo Lacalle, Beatriz Gómez, Pablo Julio Pohlham-
mer, Javier Mateos Pérez

National Coordinators

Fernando Aranguren Díaz, Borys Bustamante Bohórquez, Zicri Colmenares,
Catarina Duff Burnay, Gabriela Gómez Rodríguez, David González, Pablo
Julio Pohlhammer, Mónica S. Kirchheimer, Charo Lacalle, Pedro Lopes,
Kruzkaya Ordóñez, Juan Piñón, Ezequiel Rivero, Rosario Sánchez Vilela,
Luisa Torrealba, Maria Immacolata Vassallo de Lopes.

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PRESENTATION

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

In 2024, the 18th 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:

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

- Obitel Yearbook 2022: Transformations in the Seriality of Ibero-American Television Fiction in Times of Streaming. Coordinator of the edition: Rosario Sánchez Vilela.
- Obitel Yearbook 2023: Internationalization of Television Fiction Production in Ibero-America. Coordinator of the edition: Rosario Sánchez Vilela.

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 19 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.

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: actors, technologies, and strategies. Since then, Video on Demand Services (SVOD) have been occupying us more and more due to the importance of the so-called “streaming war” The methodological activities carried out for this 2024 Yearbook were essentially the following:

- 1) Systematic monitoring of fiction programs broadcasted on Open TV channels of the 10 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 plural 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 (PayTV) in the 10 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 Yearbook is: What Is Happening with Narratives in Ibero-American Fiction?

The monitoring was carried out by a network of research teams from 11 countries, at different universities in the Ibero-American region: Argentina, Brazil, Chile, Colombia, Mexico, 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 in this case is: What Is Happening with Narratives in Ibero-American Fiction?

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.

OBITEL NATIONAL RESEARCH TEAMS

Argentina

National coordinators: Mónica S. Kirchheimer (Universidad Nacional de las Artes, UNA) y Ezequiel Rivero (Universidad Nacional de Quilmes, CONICET).

Brasil

(Universidade de São Paulo)

National coordinator: Maria Immacolata Vassallo de Lopes.

National vicecoordinator: Cláudia Peixoto de Moura.

Research team: Marcel Antonio Verrumo, Renata Pinheiro Loyola, Bruno Iury Fracchia, João Alfredo Alineri Ramos, Talitta Oliveira Cancio dos Santos, Catarina Lopes, Felipe Gabriel da Silva, Renan dos Santos Dias, Hellen Cristina de Almeida Barreto.

Chile

(Universidad Católica de Chile)

National coordinator: Pablo Julio Pohlhammer.

National vicecoordinator: Francisco Fernández.

Associate researchers: Alejandro Bruna Silva, Daniela Grassau, Angela Godoy.

Colombia

(Universidad Distrital Francisco José de Caldas).

National coordinators: Borys Bustamante Bohórquez, Fernando Aranguren Díaz.

Vicecoordinador: Hernán Javier Riveros Solórzano.

Research team: Diana María Lozano Prat, María Teresa Garzón Carreño, Diego Alejandro Rodríguez Wilches, Jean Paul Camilo Dávila Sierra, José David Cortés Triana, Ingrid Katerin Franco León, Jeraldin Peña, Jheraldin Murcia

México

(Universidad de Guadalajara)

National coordinators: Gabriela Gómez Rodríguez (Universidad de Guadalajara). David González Hernández (Iteso).

Research team: Adrien Charlois Allende, Darwin Franco Miguez.

Portugal

(Faculdade de Ciências Humanas, Universidade Católica Portuguesa)

National coordinator: Catarina Duff Burnay.

National vicecoordinator: Pedro Lopes. .

Research team: Marta Neves de Sousa, João Félix, Ana Lúcia Carvalho.

Spain

National coordinator: Charo Lacalle ([Universitat Autònoma de Barcelona](#)).

Associate researchers: Beatriz Gómez ([Universitat de Lleida](#)), Mariluz Sánchez ([Universitat Autònoma de Barcelona](#)), Sara Narvaiza ([Universitat Autònoma de Barcelona](#)).

Research team: Rosa Ferrer, Berta Trullàs, Raquel Crisóstomo, Tatiana Hidalgo-Marí, Jesús Segarra-Saavedra, Maria Porta, Suzamara Bastos, Tomas Cajueiro, Sabine Fakihi.

United States

(New York University)

National coordinator: Juan Piñón.

Uruguay

(Universidad Católica del Uruguay)

National coordinator: Rosario Sánchez Vilela.

Research assistant: Tania González.

Venezuela

National coordinators: Zicri Colmenares-Díaz ([Universidad Autónoma de Baja California](#)) y Luisa Torrealba ([Universidad Central de Venezuela](#))

Research team: Morella Alvarado, Martin Hahn.

FIRST PART
IBERO-AMERICAN TELEVISION FICTION IN 2023

COMPARATIVE CHAPTER: THE UNSTOPPABLE RISE OF STREAMING

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Authors: Charo Lacalle (<https://orcid.org/0000-0002-0024-6591>)

Beatriz Gómez (<http://orcid.org/0000-0002-0557-528X>)

Pablo Julio Pohlhammer (<https://orcid.org/0000-0003-1387-4463>)

Javier Mateos Pérez (<https://orcid.org/0000-0003-2056-8704>)

One more year, the Ibero-American Observatory of Television Fiction (Obitel) monitors the television systems of Ibero-American countries to report mainly on two key issues: on the one hand, the television offering and consumption levels, and on the other, the production of fiction and its main trends. This first chapter of the 2024 yearbook, without intending to replace the reading of the 10 national chapters, aims to offer an integrative synthesis of all of them. Therefore, it presents the main common points and the singularities of the television phenomenon in the different analyzed countries, as well as other aspects that may not stand out when reading an individual chapter.

The 2023 data presented in this yearbook show the consolidation of a new television model, in which streaming platforms have been displacing free-to-air television and have reached a privileged position as the main distribution technology for fiction television content. Unlike the telenovela, which remains primarily anchored to free-to-air television, the series is the dominant format in VoD, where it has grown, driven by streaming platforms. This has transformed production dynamics, increasing both production and co-production, while significantly reducing the number of episodes.

1. Obitel countries and free-to-air television in 2023

The situation of free-to-air television in Ibero-American countries is very diverse due to multiple factors: number of channels, existence of regional channels, degree of relevance and role of public television in the whole system, or presence of other players, among others. Table 1 summarizes this diversity, even though it presents only the first signals of national channels.

***Authors:** Charo Lacalle (Universitat Autònoma de Barcelona); Beatriz Gómez (Universitat de Lleida); Pablo Julio Pohlhammer (Pontificia Universidad Católica de Chile); Javier Mateos Pérez (Universidad Complutense de Madrid).

Figure 1. Participation of fiction time on free-to-air television¹

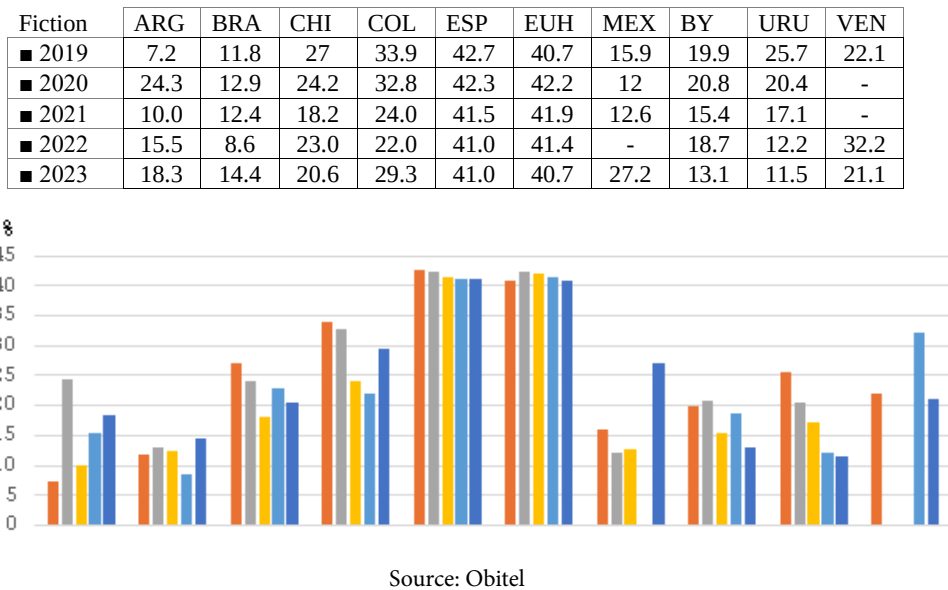


Figure 1 presents the percentage share of fiction in the overall free-to-air television programming of the different countries, as well as the evolution of the genre during the last five years. Therefore, this graph provides information not only on the weight of fiction in 2023, but also on its medium-term trend. It should be noted, however, that in this case all broadcast fiction is included - premiere and reruns - and not only that of national and/or Ibero-American origin, which we will focus on in the following sections.

In 2023, three groups of countries are identified in relation to the presence of fiction in programming. In the first group are Colombia, Spain and the Hispanic United States, with almost 30% or more of fiction presence and with that genre as first option. In the second group are Argentina, Chile and Venezuela, with fiction as second or third option and a percentage of around 20%. Finally, in Brazil, Portugal and Uruguay, fiction is a minority genre in quantitative terms, with data that do not even reach 15% of presence.

At the evolution level, no general trend is identified, as well as few significant changes. In Argentina, Brazil and Colombia, the participation of fiction increases with respect to the previous year. In the case of Argentina, a continuation of the positive trend started in 2022 is identified, while in Brazil and Colombia two important increases are evidenced after obtaining in 2022 their lowest results in the last five years. Spain and the Hispanic United States, on the other hand, have maintained almost identical data over the last five years. In contrast, Chile, Portugal, Uruguay and Venezuela have lost fiction presence in their programming over the last year. Unlike

¹ The content classification criteria are slightly different from country to country. Figures 1 and 2 were regrouped 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.

Chile and Portugal, where the data are relatively stable, in Uruguay there is a constant decrease in the time devoted to the fiction genre, which, in 2023, is accentuated because of the decrease in titles of Turkish origin. Mexico, on the other hand, presents its highest figure of the period analyzed, doubling in 2023 the result of 2021.

Figure 2. Participation of fiction vs. participation of information in programming.

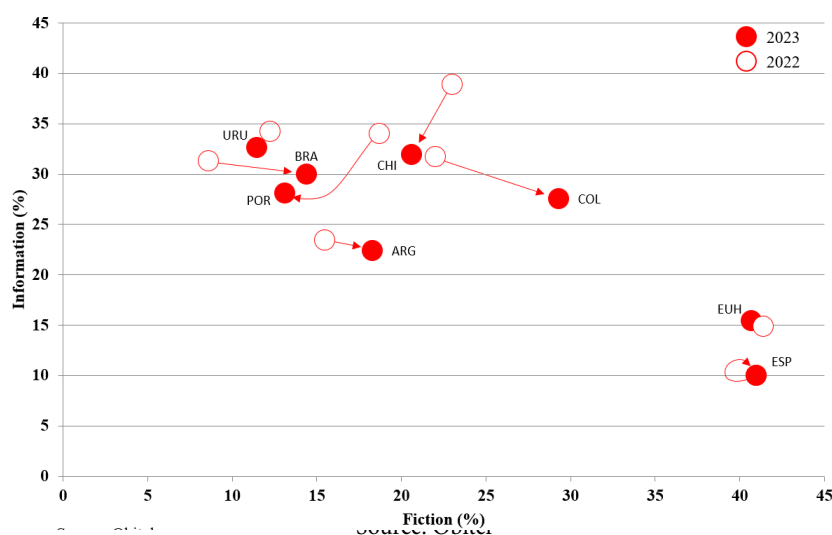


Figure 2 presents the comparative data, between 2022 and 2023, of the presence of fiction and information genres in free-to-air television programming. In 2023, the concentration of the data is lower than in the previous year, when two perfectly separated blocks of countries were identified. In the lower right corner, with a high percentage of fiction and low presence of information, are Spain and the Hispanic United States, with data almost identical to those of 2021 and 2022. At the opposite extreme, with a high proportion of information and low fiction, are Brazil, Portugal and Uruguay, whose data are more unified compared to the previous year. In Portugal and Uruguay, entertainment plays a fundamental role as the second option after information, while in Brazil it occupies the third position, after religious programs. Towards the center of the graph, with a more balanced presence between information and fiction, are Argentina, Chile and Colombia, although the first two have a deviation to the left (more information than fiction) and Colombia, to the right (more fiction than information).

2. Television fiction in Obitel countries

Section two of the national chapters gathers premiere television fiction, of Ibero-American origin, shown in the different Obitel countries during 2023. Premiere is understood as that broadcast for the first time in the country, regardless of whether it has been shown before in other countries. It is common for content released on VoD platforms to be broadcast with little time difference on free-to-air television.

Tables number 2 from each national chapters record the number of titles and hours in different television fiction formats exhibited in each country. In this case, the total number of hours is represented.

Table 2. Supply of hours of national fiction premiere on free-to-air television (2019-2023). ²

Year	ARG	BRA	CHI	COL	ESP	EUH	MEX	BY	URU	Total
2019	372	1,307	747	518	1,451	512	1,166	1,029	3	7,105
2020	62	416	274	271	1,217	366	906	794	47	4,353
2021	104	419	587	953	1,036	420	853	998	13	5,383
2022	144	1,297	477	315	912	216	1,333	912	0	5,606
2023	229	1,476	497	359	1,111	255	1,523	988	17	6,454

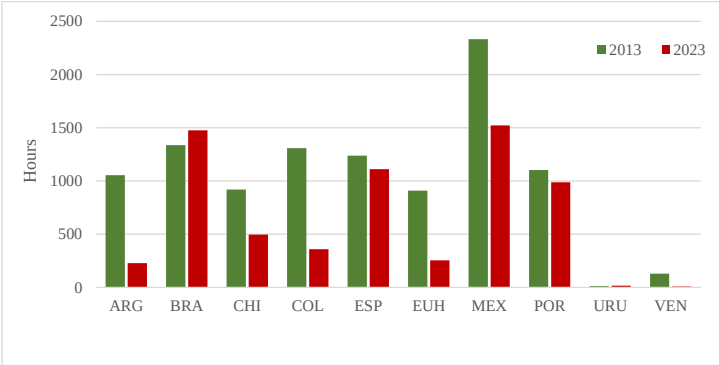
Source: Obitel

The data shows the evolution of the volume of hours of premiere television fiction over the last five years. The focus on hours, rather than titles, stems from the fact that some formats, like telenovelas, can have 10 or even 20 times more episodes than a miniseries. As a result, hours are a more accurate measure of the production capacity of national audiovisual industries. This is particularly relevant since the main purpose of production is to meet domestic demand, but these contents are also likely to circulate in other countries within the region.

Table 2 shows that, after the generalized drop in 2020 due to the COVID19 pandemic, from 2021 onwards there has been a permanent recovery at the aggregate level. In 2023, all countries have increased their releases compared to the previous year. However, this recovery only reaches 91% of the 2019 volume, representing an average drop of 9%, with the exceptions of Brazil and Mexico, which have grown compared to that year.

² The chapter on Spain distinguishes between productions by national and regional channels. This section considers the sum of all of them.

Figure 3. National TV fiction premieres in each country: 2013 vs. 2023



Source: Obitel

Figure 3 compares the production volume in 2023 with the previous 10 years. If the group of countries as a whole is considered, it is observed that the drop in the number of hours of national premiere television fiction is not 9%, but 55%. Individually, the countries whose production has declined the least are Brazil (-3%) and Portugal (-17%), while Argentina recorded the largest percentage drop (-86%). In absolute terms, the most significant drop is that of Colombia, since between 2013 and 2023 it reduced by 951 the number of hours of premiere television fiction exhibited locally.

Table 2 and Figure 3 represent the domestic consumption of national production in the different countries. But the exploitation of these contents does not stop there; in many cases, they continue to circulate through VoD platforms or are exported to television in other countries.

Tables 3 from each national chapters reflect the number of titles and hours of premiere television fiction of Ibero-American origin exhibited in each country during 2023, also distinguishing the co-productions in which the country itself participates and those made by other Obitel countries. The purpose of Table 3 of this comparative chapter is to make a synthesis, since its cross reading is not visible in the individual chapters.

The vertical reading, on the other hand, is similar to that of the national chapters: under each country, the origin of the premiere television fiction shown there is indicated³. The comparison allows observing the different degree of diversity of content origins available in each country. Apart from the completely autarkic Portugal, using a common index of market concentration as a ranking criterion⁴, the least diverse country in its consumption is Mexico, followed by the Hispanic United States, and the most diverse, Venezuela, Argentina and Uruguay.

³ In the case of co-productions, the hours are distributed equally among the countries involved.

⁴ The Herfindahl-Hirschman index (HHI) was used.

Table 3. Ibero-American fiction premieres shown in each country in 2023

Country of origin	Country in which it is exhibited											Total exported ⁵		
	Hours	ARG	BRA	CHI ⁶	COL	ESP	EUH	MEX	BY	URU	VEN	2023	2022	2021
	ARG	229	-	-	-	-	-	-	-	130	10	140	13	68
	BRA	114	1,476	442	-	-	-	19	-	479	444	1,499	2,046	1,242
	CHI	-	-	492	-	-	-	-	-	222	125	347	102	195
	COL	282	-	-	359	43	-	-	-	-	305	629	726	1,719
	ESP	2	11	-	-	1,096	-	-	-	30	155	199	36	8
	EUH	-	-	31	-	55	255	6	-	-	-	92	373	715
	MEX	36	325	-	153	327	1,157	1,523	-	65	728	2,792	3,346	2,999
	BY	-	150	-	-	-	-	-	988	-	92	242	49	75
	URU	-	-	-	-	-	-	-	-	17	-	-	-	-
	VEN	-	-	-	-	-	-	-	-	-	9	-	-	68
Total exhibited		663	1,963	965	512	1,520	1,412	1,548	988	944	1,869			

Source: Obitel

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The horizontal reading of the table shows the number of hours that have been shown in 2023 as premiere fiction in the different Obitel countries, although those contents are not necessarily the same, because they could have been shown in previous years in another country. But, since they are counted only once in each country, their sum constitutes a measure of the countries’ capacity to sell their production elsewhere in the region.

In absolute terms, Mexico (2,792) and Brazil (1,499) have a greater exposure of their contents than the rest of the countries. However, considering that what is usually exported is content created primarily for the local market, it is important to determine the size of the foreign market with respect to the domestic market. The result can be expressed in a simple indicator, which represents the quotient between exports and domestic exposure.

⁵ The information reported for 2021 in previous versions is different because this table does not include data for Peru.

⁶ Since they are not included in the measurement systems due to lack of payment, two channels owned by Al-bavisión, which are irrelevant in terms of audience, are omitted in Chile, although in previous years they have shown some content of Mexican origin.

Table 4. Size of the external market compared to the internal market

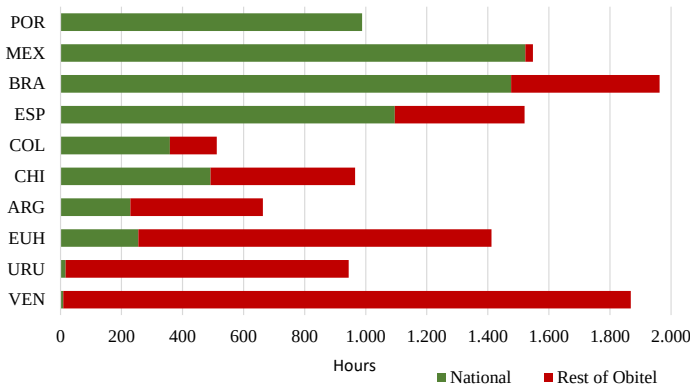
ARG	BRA	CHI	COL	ESP	EUH	MEX	BY	URU	VEN
61%	102%	71%	176%	18%	36%	183%	24%	0%	0%

Source: Obitel

This approximation continues to show Mexico and Brazil heavily focused on the foreign market, but places Colombia ahead of Brazil because it manages to have a higher proportion of its production exhibited in other countries. At the other extreme are Spain and Portugal. Despite high production volumes and a very high standard of production, their export levels, relative to production, are among the lowest in the region. Of course, by expanding the range of countries observed or also including reruns of the same content, these indicators may yield different values.

The vertical reading of the table provides information on the degree to which the needs for premiere Ibero-American premiere fiction are met by the country’s own production or by imported contents, as can be seen in the following figure.⁷

Figure 4. Ibero-American fiction premieres screened in 2023



Source: Obitel

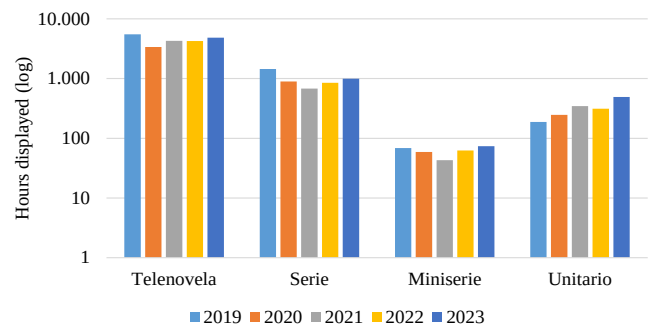
Regardless of the amount of Ibero-American fiction exhibited in each country, in relation to the balance between in-house and imported production, figure 4 clearly shows three groups of countries. Portugal and Mexico appear as countries that are totally or almost totally self-supplied. In Mexico, the presence of scripts and adaptations of titles developed in other countries is probably more relevant than the presence of productions purchased from them. At the other extreme are Uruguay and Venezuela, which depend almost entirely on the import of fiction contents. The

⁷ The relevance that fiction from other origins, such as Turkey, the English-speaking United States, Korea or the rest of Europe, may have in each country’s broadcast television is a blind spot to be taken into consideration.

latter two, in addition to the aforementioned high diversity of their consumption, also have a greater number of imports from different countries than the rest of the Obitel members.⁸

The yearbook also addresses the issue of television fiction formats exhibited. Tables 2 from each national chapters summarizes the national titles of the last five years in the different formats. This is shown in Figure 5, which considers only the formats with the greatest presence. Since there are two orders of magnitude between the number of hours of telenovelas and miniseries, the axis of the figure uses a logarithmic scale so that the telenovela does not make invisible the evolution of the other formats.

Figure 5. Hours of national fiction premiere in the Obitel scope according to format in 2023.⁹



Source: Obitel

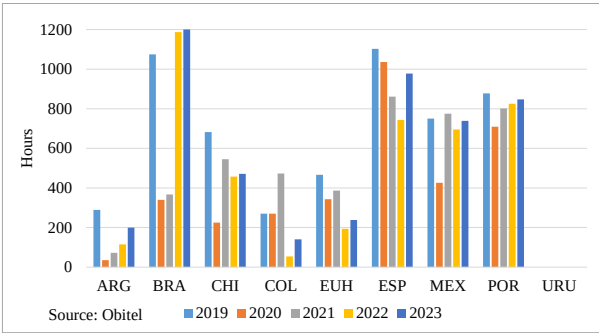
Telenovela is by far the format with the largest presence. Domestic premiere hours screened in 2023 represent 52% more than the sum of the other formats. Although it has not returned to pre-pandemic levels, after two stable years, it grew by 13% in 2023. Series and miniseries, the formats that move more easily to VoD, show two consecutive years of strong growth: 25% and 132% in the case of series and 46% and 18% in the case of miniseries. For their part, although unit formats have fallen back in 2023, their average growth since 2019 has been 30% per year.

The gradual evolution shown in the aggregate data for formats in figure 5 disappears in the breakdown by country, as shown in figures 6 and 7 on telenovelas and series.

⁸ These are different measures. Argentina, for example, imports two hours from Spain, so it counts as one more country although the contribution in absolute terms of two hours to the diversity index is insignificant.

⁹ The countries included in Figure 5 are Argentina, Brazil, Chile, Colombia, Spain, the United States, Mexico, Portugal and Uruguay.

Figure 6. Showing hours of premiere national telenovelas in each country¹⁰



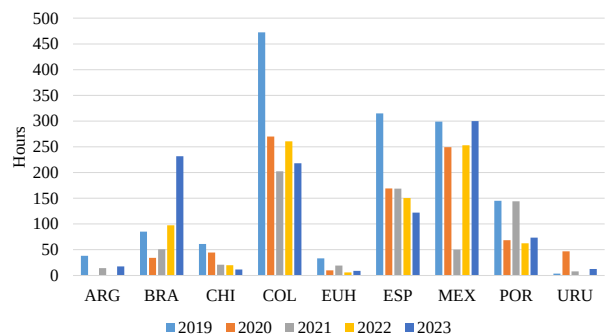
Source: Obitel

Figure 6 shows that the telenovela faces very different realities in different countries. Thus, Argentina, where it practically disappeared with the pandemic, offers three years of sustained growth. Brazil, where the effects of the pandemic extended until 2021, presents two stable years and at higher levels than in 2019. Chile recovered after the 2020 downturn, but at a lower level, explained by the disappearance of competition and the hegemony of a single dominant channel. The Hispanic United States shows an oscillating decline. Spain, which seemed to have embarked on an accelerated and sustained reduction, shows results in 2023 that contradict the trend. Mexico and Portugal are making progress in recovering their pre-pandemic level, while Uruguay does not participate in this format.

Unlike the telenovela, whose main anchor continues to be broadcast television, the series is a format that naturally inhabits VoD, where it has grown stimulated by streaming platforms. Figure 7 shows its presence in broadcast television. In many cases, the titles have been released, with little time difference, also on VoD and there are series that have never been on free-to-air television, so this is a partial overview of the format and the biases are not the same in different countries. Brazil, which appears here with a strong and sustained growth, will be seen later that this is reinforced in VoD. Linear TV declines slightly in Spain in line with the rise of VoD (69 titles in 2023).

¹⁰ Although in Spain the format used is the serial, for comparative purposes in this chapter it has been homologated to the telenovela.

Figure 7. Hours of exhibition of premiere national series in each country.



Source: Obitel

3. VoD Monitoring

As indicated in section 1, the continuous growth of streaming platforms and the constant emergence of new players have turned them into the main distribution windows for fiction contents in the Ibero-American panorama. Less than a decade ago, Ibero-American serialized fiction was premiered on broadcast television and, occasionally, on pay television. Today, this trend has been reversed, displacing the premieres of national fiction from free-to-air television to video-on-demand platforms. Alternatively, a significant increase in agreements between free-to-air television, whether public or private, and VoD services has also been identified, so that the same fiction can be watched in both windows, simultaneously or separated for a short period of time. This fact points to a transformation in the distribution system, but not necessarily to a reduction in the production capacity of free-to-air channels, which continue to invest in fiction, but increasing their economic profitability through their own platforms (free or paid) or other paid platforms.

In this new television environment, fiction productions are no longer conceived exclusively for domestic markets, but rather aspire to a potential audience beyond their geographical boundaries. This phenomenon, in turn, transforms the production dynamics by facilitating co-productions, which have increased in recent years, altering the conventions of formats with a greater number of productions per year, but decreasing the number of installments.

The size of VoD platforms operating in the Ibero-American environment remains partially unknown due to the lack of data on the number of users of each platform, its turnover and audience. However, although platform data are not public in any of the countries analyzed, studies and reports by specialized consulting firms indicate that Netflix is the leading platform in Argentina, Chile, Colombia, Spain, the Hispanic United States, Mexico, Portugal, Uruguay and Venezuela. This platform suffered a significant decline in subscribers in the first half of 2023, which has been interpreted as an indicator of the end of the expansion stage of the platforms and

the beginning of a market adjustment phase in the Hispanic United States, Mexico, Portugal and Uruguay.

However, local platforms are usually financed by the states themselves (usually free, as in Colombia, Spain, Portugal and Venezuela) or derived from free-to-air television channels and pay-TV operators. Their relevance in the television system as a whole is usually secondary in most Ibero-American countries, although some exceptions and singularities can be identified. For example, Globoplay (Brazil) has the largest catalog of national content, Caracol Play (Colombia) plays an important role in the exhibition of national production, and Movistar+ and Atresplayer (Spain) are two of the main producers of high-level fiction in the country and, consequently, enjoy great popularity.

Another notable trend among VoD platforms this year is the introduction of advertising. Following in the footsteps of Netflix, Disney+, Prime Video and Vix+ have also started offering plans with ads. Table 5 –which synthesizes Table 7 from the various national chapters– includes each country's productions, refined to account for co-productions between the different countries in order to eliminate duplicates. Thus, the criterion for reporting the number of fictions in this case is to remove duplications.

Except for Spain, in the rest of the countries, both streaming fiction and free-to-air fiction are considered premieres, provided that the gap between both broadcasts is less than one year. In the case of Spain, the high volume of productions compared to the rest of the Latin American countries, and the exhibition of all of them on the country's own television platforms or through agreements with international OTTs, results in the application of the concept of premiere in a restricted sense, regardless of the distribution system. The computation of co-productions also introduces another exception to the general principles governing the preparation of the table, as each co-produced title involves the participation of at least two countries. Therefore, the total number of co-productions of each platform is not derived from the data in the table. Nor is the country of origin of the OTT that participated in the production included as a co-producer, which is on the contrary relevant in the case of the United States, whose platforms actively participated in 65 titles.

Based on the defined criteria, it was found that the total number of fiction premieres in 2023 amounted to 238 titles, 12 of which were co-produced among Ibero-American countries. Spain is the country with the highest number of absolute streaming premieres as well as the leading co-producer –alongside Argentina and Mexico– with five titles each. Regarding the exhibition of premieres on different platforms, Netflix and Prime Video lead an uneven ranking with 48 and 37 titles respectively, followed by ViX (27 titles), Globoplay (25 titles), and Star+ (24 titles).

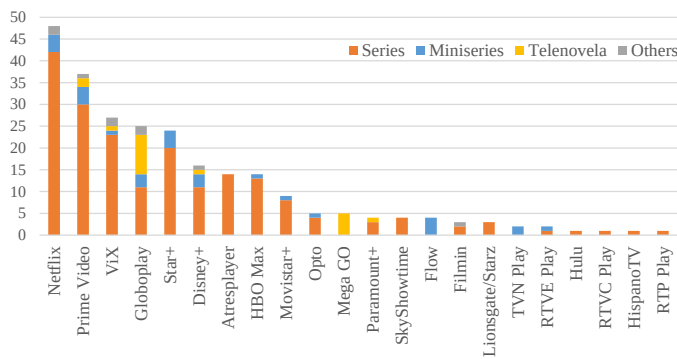
Table 5. Serial fiction titles released by each country on platforms during 2023.

Platform	ARG	BRA	CHI	COL	ESP	EUH*	MEX	BY	URU	VEN	Total	# Countries
Netflix	3	9		5 (1)	17	2 (1)	10	1			47 (1)	7
Prime Video	3 (1)	7	1	4	11 (1)	3	5	1 (1)	(1)		35 (2)	9
ViX				1 (1)	(1)		24 (2)				25 (2)	3
Globoplay		24 (1)						(1)			24 (1)	2
Star+	7 (1)	9			(1)		7				23 (1)	4
Disney+	2 (2)	5		1	1 (1)	1 (1)	3 (2)				13 (3)	6
Atresplayer					14						14	1
HBO Max	3 (1)	3			2		5 (1)				13 (1)	4
Movistar+					9						9	1
Mega GO			5								5	1
Opto								5			5	1
Flow	4										4	1
Paramount+		1	1				2				4	3
SkyShowtime					4						4	1
Filmin					3						3	1
Lionsgate/Starz					2		1				3	2
RTVE Play			(1)		1 (1)						1 (1)	2
TVN Play			2								2	1
HispanoTV										1	1	1
Hulu						1					1	1
RTP Play								1			1	1
RTVC Play				1							1	1
Total	22 (5)	58 (1)	9 (1)	12 (2)	64 (5)	7 (2)	57 (5)	8 (2)	(1)	1	23 (1) 8 (2)	

Source: Obitel

As shown in Figure 8, series reaffirm their dominance among streaming formats, standing at a considerable distance from telenovelas. Series are also predominant on most platforms, except for Mega GO, where telenovelas dominate, and Flow and TVNPlay, which lean more towards miniseries.

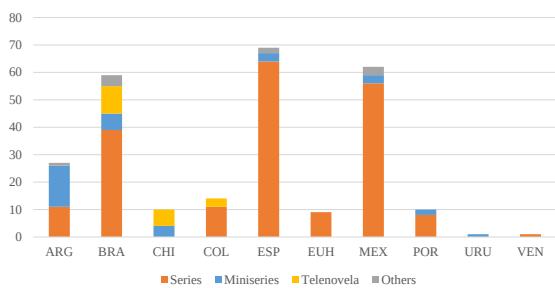
Figure 8. Formats of premiere serialized fiction on VoD platforms during 2023.



Source: Obitel

The distribution of formats by country, as shown in Figure 9, reaffirms the supremacy of series, except in Chile and Uruguay. It is also worth noting the absence of premiere telenovelas on streaming platforms in Argentina, Spain, Mexico, and Uruguay.

Figure 9. Participation by country in premiere serialized fiction formats on VoD platforms during 2023.¹¹



Source: Obitel

The experience accumulated in fiction production is reflected in the quality of many VoD contributions in 2023. Although these fictions are not required to target intergenerational audiences –as is the case with free-to-air fiction– various countries report no significant differences in thematic or narrative characteristics between the proposals of the two distribution systems.

Mexico, Portugal, Argentina, Colombia, and Spain present diverse projects featuring young characters, aiming to capture this unpredictable and volatile audience. Venezuela explores the incorporation of internet resources and languages, as another way to appeal to younger viewers.

¹¹ The totals in the graph are higher than those in Figure 7 due to the possible participation of different countries in the same title.

In terms of format, while telenovelas maintain their dominance on linear television, they have also achieved notable success on streaming platforms, where series and serials have seen a general rise. U.S. Hispanics are exploring hybrid formulas that can be applied to both series and serial formats.

Themes related to diversity open up countless possibilities, addressing identity of origin (Brazil), social class (Uruguay, Argentina), or sexual identity (Spain, Mexico). Female protagonists are prominent across different genres and formats in Ibero-American fiction, although most biopics this year are dedicated to men.

The complexity and depth of characters is another feature shared by a large number of fictions, aligning with the relatively modest contribution of comedy compared to drama and suspense.

4. Fiction, interactivity and audience participation

This section summarizes the main actions proposed by the networks to promote audience interaction and participation around their fictions. At a time of overabundance of supply, most of the industry's strategies are focused on attracting the audience's attention before, during and after the broadcast. However, in recent years, the networks' strategies have been limited to appealing to the audience to view already well-known materials (photo galleries, behind-the-scenes, character profiles, etc.), get likes and share them. Original content is scarce, as are those that call for real involvement with the narrative. Consequently, as most of the national chapters' report, the audiences response is limited to sharing and commenting on the fiction, while original creative practices are exceptional.

The production and reception contexts in Obitel countries are very different, so that markets more willing than others to invest in building engagement with the audience are identified. However, such investment does not depend so much on the territory as on the channel and the fiction. For example, in Spain there is a notable reduction of transmedia proposals that promote interactivity and audience participation at a general level, but some fictions, especially those aimed at young audiences, continue to bet on this type of practices. This is the case of *UPA Next*, the sequel to *Un Paso Adelante* in Spain, which developed an impressive strategy that began with a casting to choose its protagonists to promote its launch. In addition, different meetings were organized on Atresplayer's Twitch channel; profiles of the protagonists were created on Instagram to follow them in their day-to-day lives, and a website was developed for the "Carmen Arranz School of Performing Arts", as well as Atresplayer's first experience in the metaverse, UPA LAND Dance Academy, a recreation of the UPA Next academy on the Roblox platform.

Along the same lines, Portugal identifies a setback in the production of audience participation and interactivity strategies. Without much room for experimentation, the networks continued to bet on offering content related to the plots on social networks, without being fully interactive or drivers of a more creative participation of viewers. However, two exceptions were noted. The first was the transmedia strategy of the SIC channel, which extended the narrative of the telenovela *O Papel Principal* with two *spin-offs*: *Os Eleitos* and *A Casa de Aurora*. However, the strategy did not end up working because the audience felt lost and, contrary to expectations, little involved. The second was the “Clube Morangos com Açúcar” platform, a digital experience where, for a monthly subscription, *Morangos com Açúcar* fans could access exclusive content, such as short films based on characters from the main series and behind-the-scenes videos of the filming.

In the case of Argentina, the social conversation generated by *División Palermo*, a comedy starring a special division of the local police whose members represent various social minorities (people with motor disabilities, people of short stature, people of retirement age, etc.), stands out. The fiction reached significant audience levels, but its repercussion in social networks at the time of its premiere was limited. However, the comedy has ended up becoming an obligatory cultural reference for commenting on the political reality of the country, which has recently been peppered by several events starring the forces of law and order that, due to their peculiarity, have been qualified as belonging to the fiction or even discarded as implausible. The creation of memes has been the main form of audience participation, which has produced humor about humor in the social network X.

The chapter from Mexico analyzes two different productions, a reality show and a comedy fiction, with a common element between them and the case study from Argentina: the visibilization of social minorities. While the social conversation around *La Casa de los Famosos* focused on the figure of the *influencer* Wendy Guevara, the first trans woman to win a program of this type in Mexico and the rest of Latin America; the discussion in the virtual public sphere around *Ojito de Huevo* was associated with stereotypes about visual impairment. The audience of *La Casa de los Famosos* turned to social networks to share and comment on Wendy’s stories, which explains her success inside and outside the program and Televisa’s recent interest in integrating the LGBT+ community into its programming. In the case of *Ojitos de Huevo*, it was the visual disability of its protagonist that provoked the active participation of the audience in social networks. The audience with functional diversity expressed their identification with the characters and, like the rest of the users, expressed their gratitude to the series for respectfully addressing disability.

In Brazil, telenovelas continued to mobilize emotions and convey the audience’s discourse on social networks. For example, *Vai na Fé* conquered an audience that became commentators of the fiction, especially in relation to the formation of different

couples. The rural environment represented in *Terra e Paixão*, 2023's leading fiction, encouraged conversation about agrarian conflicts, the sociability experienced in the contemporary countryside, violence and, of course, the affective relationships between the characters. The relationship developed between Ramiro and Kelvin, under the name "Kelmiro", became a *trending topic*. Fans raised money to, through a billboard near Globo studios, ask for a *spin-off* centered on the couple. The success of "Kelmiro" changed the course of the production, which increased the characters' screen time, boosted Ramiro's redemption and sealed the couple's happy ending with a kiss between the two.

In the case of Chile, Mega continues to be the reference. Its interactive strategy responds to a clear objective: that the relationship between fiction and audience extends beyond the screen and the broadcasting schedule. Therefore, it includes content specially created for Instagram, TikTok, YouTube, its own website and its streaming platform, MegaGo. Such content can be classified into three types: calls to action to the audience through, for example, the use of provocative hashtags during broadcasts; promotional transmedia, through the creation of advertising pieces independent of the fiction whose story takes advantage of characters, scenarios and/or plots; and transmedia in social networks, for example, short videos of synchronized dance or memes.

Rigo, one of the most watched fictions in Colombia in 2023, launched a promotional campaign that circulated in print media and social networks. Proof of the success of the campaign and the broadcast of the fiction was the registration of a petition in change.org under the title: "Save RIGO in December! Don't take the series off the air! One of the keys to the success of the production was its musical setting. The main song of the fiction, a guasca titled "El hijo de Urrao", got 1.8 million views on an unofficial Youtube account and 1.1 million plays on Spotify. The complete soundtrack of the telenovela, with popular songs from the region and shared by the same television channel, has contributed to the construction of the collective identity and the enhancement of the customs and folklore of a region.

In the U.S. Hispanic market, the prequel to *El Señor de los Cielos*, titled *El Señor de los Cielos: Sus Comienzos*, enjoyed a high social impact: the specific post of *El Señor de los Cielos: Sus Comienzos*, within the *El Señor de los Cielos* Facebook site, has 708 thousand followers. In addition, the link to *Los Comienzos* on Instagram that Telemundo published within the specific post obtained 34 thousand "likes". However, it was on Facebook and YouTube where the miniseries achieved the most intense social participation, given that both networks offer, in different modalities, access to the installments.

Ali Sócrates has been the series chosen to illustrate audience participation in the digital space in Uruguay, since, according to the authors of the national chapter, its trajectory has the most frequent characteristics of Uruguayan television fiction.

The fiction began to take shape in 2015 and its presence in social networks started in 2016. Its premiere, however, did not arrive until 2023, when the audience participation strategy was reactivated, which consisted in the circulation of contents in three social networks: X, Instagram and Facebook. The latter presented the highest number of publications by broadcasters, as well as responses from the audience. Although the participation of viewers was low in all networks, this type of interventions was key in the realization of the project, contributing to its visibility from the beginning and to fundraising.

Dramáticas, the only Venezuelan fiction production that premiered in 2023, did not obtain the audience response desired by the network. Although the first publications, mainly on Instagram, obtained a high number of comments and “likes”, the premiere of the fiction was subject to strong criticism. The questionings focused on the quality of the performances and the fiction broadcast itself. For its premiere, the web page www.mihispano.tv and the app HispanoTV were launched, through which the audience could enjoy *Dramáticas* from anywhere in the world. However, the audience indicated that neither of them worked during the premiere.

5. Highlights of the year

The growing popularity of reality TV on streaming platforms in recent years has led to the resurgence of this type of programming, making it the most serious competitor to fiction. Among the reasons driving the rise of reality shows are the resilience and adaptability of the most celebrated formats (*Big Brother*, *Survivor*, *La Isla de Los Famosos*) –two invaluable features in VoD– as well as the success of celebrity-driven docudramas (*The Kardashians*, *Gaga: Five Foot Two*) in the era of influencers.

In an environment marked by extreme competition, which has forced linear television to diversify through its own platforms and alliances with OTTs, the lower economic investment required by reality shows and the flexibility of their production processes have made them highly relevant throughout 2023 in nearly all Obitel countries. The United States and Spain are the clearest examples of this upward trend. In U.S. Hispanic television, the 4.7% rating achieved by *La Casa de Los Famosos* equaled that of the eighth season of the popular telenovela *El Señor de los Cielos* in an annual ranking where other reality formats like *Los 50*, *Exatlón*, or *Top Chef* outperformed premiere fiction (with the sole exception of *La Reina del Sur*). In Spain, the rating of the most successful reality shows in 2023, *Tu Cara Me Suena* (3.9%) and *Supervivientes* (3.5%), are significantly higher than the leading fiction programs in the annual ranking: *Cuéntame Cómo Pasó* (3%) and *Laura y Sus Misterios* (2.3%). As for *Operación Triunfo*, the launch of its twelfth season on Prime Video provided the North American OTT with the highest number of Spanish subscribers since its debut.

The growth of reality shows in recent years is also linked to the rise of true crime (in both documentary and fictional versions), biopics, and fiction based on real events. Netflix's *Rabo de Peixe* exemplifies this trend in Portugal, telling the story of a shipwrecked sailboat that arrived by accident in the Azores in 2001. The series, which has accumulated over 31.5 hours of streaming views, narrates how the shipwreck impacted the daily lives of the residents of the small village that gives the series its title. Scripted by Augusto Fraga, the initial euphoria over the possibility of escaping poverty eventually turns into a nightmare.

In Mexico, two of the most prominent biopics in 2023 were *Gloria Trevi: Ellas Soy Yo*, about the ordeal of the singer accused of sexual abuse and human trafficking in the early 2000s, and *Se Llamaba Pedro Infante*, which chronicles the life of the actor who became an icon for multiple generations. ViX and El Canal de las Estrellas used the biopic about Gloria Trevi to launch a campaign on harassment and violence against women, encouraging victims to report their aggressors. The *Se Llamaba Pedro Infante* series (available on ViX+) reflects on Mexican identity and traditional culture, common themes in Mexican productions.

In Brazil, the most prominent biopic of 2023 is *Betinho, No Fio da Navalha*, about the sociologist and human rights activist Herbert José de Sousa. Written by José Júnior and co-produced by Globoplay with AfroReggae Audiovisual and Formata Produções, the series has become a hit with both audiences and critics, earning nominations in six categories at the Cannes International Series Festival.

In Chile, the review of the past leads to a retrospective look at the coup d'état 50 years later, with two series that promote learning, reflection, and understanding of collective social constructions. The first, *La Sangre del Camaleón: Doble Vida de Un Agente Comunista* (inspired by Javier Rebolledo's book *La Sangre del Camaleón*), recovers key episodes from the Pinochet era through the story of a successful businessman secretly committed to armed resistance against the dictatorship, leveraging his privileged position and ties to the regime's high command. The second, *Los mil días de Allende*, revisits the terror campaign led by the far-right, the progressive economic measures implemented by the socialist president, and pivotal historical events such as the failed assassination attempt on Pinochet and Pope John Paul II's visit.

Spanish fiction production in 2023 offers a wide array of genres, subgenres, and formats, with a particular focus on stories based on real events. One of Netflix's biggest hits this year, *El Cuerpo en Llamas*, reconstructs the murder of Rosa Peral's partner, for which she and her lover were sentenced to severe prison terms. *Camilo Superstar* is a biopic about the production of *Jesus Christ Superstar*, starring the famous pop singer Camilo Sesto in the 1960s. The TV movie *Quico Sabater* is another notable biopic this year, aired on Catalan TV3, about a Maquis member who continued fighting after Franco's dictatorship was established in 1939.

Stories set in the past offer some interesting contributions, though with mixed audience results. In Mexico, *Las Pelotaris 1926* stands out, focusing on a group of Mexican and Spanish women who play this sport in a male-dominated environment. In Spain, *Los Pacientes del Doctor García*, based on homonymous Almudena Grandes' novel, recalls the Civil War and post-war period. The Brazilian telenovela *Terra e Paixão* takes a step back into the distant past of rural Brazil to tell the story of a woman whose husband was murdered on behalf of a landowner in Mato Grosso. The second season of Argentina's *Tierra de Amor y Venganza* draws on the television archive of the 1980s, telling a story set between the end of the dictatorship and the return to democracy, with characters driven by a desire for revenge, as in the first season released in 2019.

The return of telenovelas is perhaps the most remarkable feature of Colombian fiction in 2023. *Ana de Nadie*, built around a story of infidelities, harks back to themes explored in the popular *Señora Isabel* (1993) despite its contemporary setting. This novel approach earned it the top spot in the premiere fiction ranking.

Gender and sexual identity are central to several key productions this year. *Vencer La Culpa*, the fifth installment of Mexico's anthology *Vencer*, tells the story of a transgender character. This theme is also explored in Argentina's *Buenos Chicos*, which delves into the family's rejection of the character's self-perception.

Finally, it's worth noting the revival of original fiction production in Uruguay, with the series *Temporario* and *Alí Sócrates*. *Temporario* returned for a second season, following up on its 2001 debut, this time focusing on a recently separated man in his fifties trying to rediscover his seductive side. *Alí Sócrates* is a comedy about two friends who plan to open a gym.

6. Theme of the year 2023: What is happening with the narratives in Ibero-American television fiction?

On this occasion, the theme of the year explores the narratives used by Ibero-American fiction and questions their modes of narration. To meet this purpose, each country selects a sample of relevant works due to the impact and the diversity of their stories and the outstanding features are pointed out: themes, characters, and narrative and stylistic resources. All the countries present convergences as well as particularities, which is why, in line with previous reports, they are presented separately in order to facilitate their reading.

Argentina chooses five fictions broadcast by VoD platforms: *Iosi*, *El Espía Arrepentido* (Prime Video), *El Reino*, *El Amor Después del Amor* (Netflix), *Nada* and *El Encargado* (Star+), with varied themes, but that maintain topics from previous years. For example, they emphasize the characterization of the self-interested urban

porteño and the corrupt city government in contrast to the honest citizens of the interior of the country. The series narrate *biopics* of patriotic star -Fito Páez- and reconstruct the past by focusing on unresolved issues, such as the attacks on Jewish institutions in the nineties. The past tries to explain the facts in a speculative way, bringing into play the correlation between the fictional narrative and its historical correspondence. The protagonists of the productions are recognized performer (Robert De Niro, as a paradigm) and they constitute a *star system* for the platforms that seek to seduce markets, foreign and national, and thus guarantee a return on investment through global audiences. All productions have technical quality and high production aesthetics, and they build plausible and coherent universes with the plots.

Brazil selects the telenovela *Vai na Fé* (TV Globo) as the epitome of form and content. The serial composes a complex narrative that hybridizes genres -comedy with drama- and employs social themes -gender violence, racism, social discrimination, homophobia, terminal illnesses, evangelical religion or ageism-. The melodramatic story represents the Brazilian identity from the family institution to express the complexity of social relations. It also considers characters that integrate the LGTBQ+ community, but the innovation lies on the choice of the cast of Black people that plays leading roles from different social class. Regarding the narrative resources of *Vai na Fé*, the use of metanarrative stands out. The telenovela gathers in the same story narrative components -dialogues, actresses, scenes- that refer to three of the historical serials with the greatest impact in the country. To do so, it employs postmodern actions, for example, as when a character addresses the scriptwriters, quotes texts of his iconic characters or proposes a toast to telenovelas. Its metalanguage pays tribute to history and, at the same time, points out future directions for the format.

Chile also chooses the telenovelas of the Mega channel (*Como La Vida Misma*, *La Ley de Baltazar*, *Al Sur del Corazón*) to explain a constantly evolving industry. The format progresses from experimentation and from the development of plots which no longer use antagonists to keep the audience's interest. In fact, conflicts arise from the life circumstances of the protagonists, which result in the verisimilitude of the stories. The protagonists are not Manichean (good or bad), but they have strengths and weaknesses that reflect human complexity. The romantic love of a single couple (the goal of "being together") as the main thread of the series also disappears, and the inclusion of diverse relationships (gay couples) in the core of the plot is consolidated. They also show novel themes that allude to stories about older people (couple relationships), or about teenagers (bullying in social networks, leaking of compromising images). The most prominent resources look at the treatment of time and the use of the landscape. The first one is approached in a flexible way, which allows the events to be developed with greater depth and nuance, and to explore the themes in

a multidimensional way. The second one is used in an integrated manner by setting specific locations that form a representative and idealized reality, creating a stronger tie with the audience.

In Colombia, the stories present a diversity that dialogues directly with the multiplicity of social conditions of a time of contradictions such as the present. Protagonists who bear the classic melodrama as part of their existence emerge in stories of overcoming adversity and suffering, and of criminality and drug trafficking. Other characters are also created with new roles born with technologies (*La Influencer*) and with subjects in masculine deconstruction (*Manes*). There is a certain standstill produced by the overexploitation of topics and narrative resources turned into central forms of the stories, as well as by the presence of remakes, biopics and continuations. The remake, which retells the story by updating it, can be a success (*Ana de Nadie*) or a failure (*Café con Aroma de Mujer*). The continuations, which tell “what happened next”, combine nostalgia and present (*Pasión de Gavilanes*, *La Dinastía Indomable*). The *biopics* are about singers (*Diomedez, el Cacique de la Junta*; *Arelys Henao: Canto para no Llorar*), athletes (*La Selección*, *Rigo*) and historical figures (*La Pola*), although the stories bet on a reinterpretation based on melodrama -an omnipresent figure in the stories- rather than on documentary.

Spanish annual premiere television fiction is abundant and well-stocked. It combines quantity and convention in a large contingent of premiere titles and new seasons of previous outstanding works such as, for example, the second season of *Rapa, Cardo y Veneno*, the third season of *La Unidad* and the twenty-third season of *Cuéntame*. This vast output creates a landscape of overabundance when combined with the productions from streaming platforms. Within this catalog of television fiction, España selects five singular and heterogeneous works, which provide a diversity of genres, themes and formats: *La Mesías*, *El Hijo Zurdo*, *El Otro Lado* (Movistar+), *Selftape* (Filmin) and *Déjate Ver* (Atresplayer). All of them stand out for the quality, for the interest of the protagonists and for the novelty of the themes and approach. In these series there is a predominance of the female gaze, a realistic and contemporary framework, and themes drawn from current problems, with an emphasis on identity and personal progress. The expository structures are shaped with different temporalities (past and present) that explain the evolution and actions of the characters. We can appreciate the care taken to seek innovations in genres, originality in narratives and renewed visual styles. The result offers a horizon of narrative prosperity as well as plural, progressive and personal voices, which adopt styles where the influences of foreign production can be glimpsed with distinct characteristics of Spanish identity.

In the United States, TelevisaUnivision continues the tradition of romantic melodrama, while Telemundo changes its formula and go for a *reglobalization* model. The proposal promotes narratives that travel thanks to plots that take place and

intertwine in different cities simultaneously. Additionally, the series feature casts from different nationalities that use diverse and identifiable Spanish accents. The intention is to show a regional idea, designed from Miami, for global consumption. The narratives that promote this pattern refer to stories of drug trafficking and organized crime, contextualized in historical events or real people, and approached through drama mixed with thrillers, suspense or detective stories. There are also fictions about immigration as a social reality, and the challenges of adapting and assimilating to the social, cultural and linguistic dynamics of the United States (*Bajo el Mismo Cielo*, *Al Otro Lado del Muro*, *Mi Familia Perfecta*). At the same time, characters from the LGBTQ+ community are increasingly included. This dynamic goes beyond awareness-raising and now aims to inform and teach about citizens' rights. In this regard, the trans case of the girl (*Sangre de Mi Tierra*) and the boy (*100 Días para Enamorarnos*) stand out. Examples of narrative variety include *El Señor de Los Cielos*, *Juego de Mentiras* (Telemundo) and *La Fuerza de Creer* (Univision).

In Mexico, the selection includes products from broadcast television, platforms and international co-productions: *Las Pelotaris 1926*, *El Amor Invencible*, *Vencer La Culpa* (Televisa-Univision) and *El Niñero* (Netflix). The theme of violence against women and gender distances conditions the narratives of these fictions, and places women empowerment as a central node. The debate is complemented with other arguments, all of them are women's issues: breast cancer, menstruation or human trafficking. Disruptive characters in terms of identity are also included (lesbian, transgender), which reinforces plots linked to gender inequalities, as well as characters linked to artificial intelligence that strengthen the anti-macho message. There are even class conflicts that affect the distance between genders and the obstacles that the protagonists must face. The trend boosts the location of stories in the past time, giving a certain idea of context through references and costumes. Fictions also include references to international themes, plots in multiple spaces and actors of diverse national origins and age groups. Mexican narratives evolve by representing real issues -without abandoning romantic love- and including transnational proposals as a strategy to reach global audiences.

Portugal has a static television fiction market. This makes it difficult to find new trends that break the pattern established by a globalized and Anglo-American market, dominated by the three major television networks and by international platforms that take their time to define an active strategy on the national industry. Production, therefore, remains focused in telenovelas, which continue to be as the anchor product that feeds the prime-time slot from private broadcasters, contrasting with the strategies of the rest of the surrounding countries. Meanwhile, the platforms' tactics are increasingly based on the acquisition of national content already broadcast by local broadcasters, which find new audiences in non-linear viewing, such as, for example, the comedy *Pôr do Sol*. Being a peripheral market,

the Portuguese case does not see the new golden age of the audiovisual industry, suffering from lack of investment and inequality of rights and lacking a national strategy to develop a strong and competitive industry.

In Uruguay there are two premieres: the second season of *Temporario* (Channel 10) and *Alí Sócrates* (TV Ciudad). *Temporario* maintains the same characteristics: a self-conclusive seriality cohesive among the episodes by means of the space where all the action takes place (a temporary rental apartment). As it is an anthological fiction, each episode presents different plots and characters. The themes cover a wide range of topics: old age (love meetings, Alzheimer's), gender identity, prejudice or sexual abuse, among others. The format makes possible a linear temporality and the use of diverse tones: dramatic, comic, satirical. However, *Alí Sócrates* is a comedy that organizes its narrative in a continuous and cumulative seriality that presents obstacles that the protagonists -two friends who open a gym- must overcome. The series mixes classic themes, such as the pursuit of the dream, friendship, love, with recent ones, for example, social networks, bullying, the cancellation phenomenon. The situations are considered in a parodic way, with caricatured characters and a certain critical eye. The protagonists are built with the features of the canonical hero, although they have precarious characteristic, and the fiction include antagonists to generate obstacles for them. In the narrative there are temporal disruptions, such as ellipsis or flashbacks of the past that are embedded in a fragmented manner in the present. As peculiarities, they add small humorous sections after the final credits, and a resource that links the chapters with a parody in the form of a quiz show. Therefore, both fictions propose topics linked to current concerns and average characters that favor a wide identification.

In Venezuela there is a complex context that marginalizes the country's television fiction market. There is no dialogue that combines goodwill, talent and financing, and there are no business and state agreements that allow the industry to move forward. The scarce serialized fiction of recent years arises from independent production. The main works show universes linked to television: *Eneamiga*, *Intrigas tras Cámaras* and *Dramáticas*. In them there is a critical literate look (it uses slang, explains terms and processes) and reveal bad business practices, such as unlimited competition or espionage. In *Eneamiga* there are traditional plot lines, such as impossible love stories, betrayals and reunions of the past. Beyond the poor young woman whose life changes after meeting the young protagonist, there is an interest in presenting characters that resemble Venezuelan women: enterprising, supportive and creative. In *Dramáticas*, the protagonists are a group of actresses recovered by a team of producers to save a bankrupt channel. The attraction of the proposal lies in Venezuelan performers, residents inside and outside the country, most of whom are over 60 years of age. The visuality are well constructed, and the chronological narrative shows a linear structure, but the fact that all these characters star in their own

subplots slows down the central story, which is saturated with sketches and gags. The cast is reminiscent of the golden age of Venezuelan telenovela in the nineties. Setting the plot in a country that no longer exists gives the production a nostalgic and aged feel at the same time.

SECOND PART
FICTION IN OBITEL COUNTRIES IN 2023

ARGENTINA: FICTION AFTER TELEVISION¹

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Authors:

Mónica Kirchheimer² (<https://orcid.org/0000-0002-3319-0520>)

Ezequiel Rivero³ (<http://orcid.org/0000-0002-8124-0975>)

Introduction

2023 was a year dominated by an intense electoral agenda that extended throughout the second half of the year until the inauguration of a new national government in December. In terms of fiction, El Trece once again bet on national production, releasing two long-running shows that failed to significantly arouse the audience's interest. On the other hand, the leading channel, Telefe, did not release any national fiction production for the first time since Obitel Argentina has records. The strategy of promoting series created exclusively for video-on-demand platforms through open television channels was consolidated and extended to more players this year, to the point that it is clear that the production and distribution of fiction in Argentina is increasingly a function that the traditional media delegated to streaming services. In this regard, different sectors linked to fiction production began to account for this fact: the Argentine Actors Association pointed out at the end of this chapter that "it has been 119 days since no fiction has been produced for national broadcast TV. November 30, 2023 was the last day of recording of 'Buenos Chicos'. Since that day, Argentine TV does not employ actresses, actors or technical personnel to work in fiction programs"⁴. A symptomatic fact of the critical situation of national fiction is the absence of projects of one of the emblematic production companies in the field, Pol-ka. After 30 years as one of the powerhouses of television fiction, according to some media reports, the company would not have projects for the 2024-2025 period, so it could focus on providing specific services to platforms and venture into other formats⁵.

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.

² Professor and researcher at the National University of the Arts (UNA) and the University of Buenos Aires (UBA).

³ Conicet postdoctoral fellow at the Universidad Nacional de Quilmes (UNQ).

⁴ Source available in March 2024 at: <https://www.instagram.com/p/C5Etd0iOYju/?igsh=MWdyYnR4eHQwdH-BqYw%3D%3D>.

⁵ Source available in March 2024 at <https://www.lanacion.com.ar/espectaculos/television/polka-deja-de-producir-ficciones-lo-mas-parecido-al-fin-de-una-epoca-para-la-television-abierta-nid05012024/>.

1. The Audiovisual Context of Argentina in 2023

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 subsidiaries in different provinces, or commercial agreements with repeaters and 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 the surrounding urban areas).

Chart 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	
CHANNELS TOTAL = 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). In 2018, Net TV (Grupo Perfil, Argentina) and in 2022 Bravo TV (Grupo Olmos and Grupo Crónica, Argentina) were added, the latter still with low brand recognition, low audience levels and a programming that highlights the reruns 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, and pendular relations with the governments in power that go from providing funding for the development of ambitious artistic projects or technological upgrades, to threats of paralysis and retraction of its operations. This is largely due to the high dependence of the state broadcaster on funding from the National Treasury (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 areas of coverage⁶.

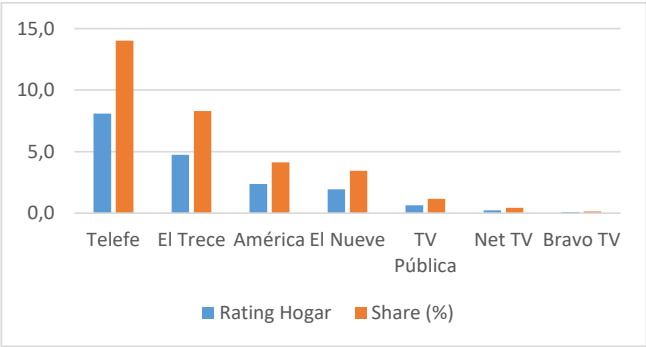
⁶ Information available in March 2024 at <https://www.tda.gob.ar/canales-cobertura.php>.

Since the early 1990s Telefe and El Trece have led the audience, which is measured mainly in the City of Buenos Aires and some of the main capitals of the country, although in the last four years Telefe has consolidated its position as clear leader, distancing itself from its direct competitor. These two channels are, in turn, the regular broadcasters of the most important television serialized fiction at national level (Kirchheimer and Rivero, 2022). In the past, Telefe has commissioned most of its fictions to different local independent production companies, with Underground standing out, owned by the American Telemundo since 2019. On the other hand, El Trece (Grupo Clarín) is the exhibition platform for the fictions of the production company Pol-ka, 91.3% of whose shares belong to the company Artear, the audiovisual division of Grupo Clarín (Convergencia, 2021), so it is, in a way, a captive production company that generates content exclusively for that broadcaster. On the other hand, El Nueve and América focus mainly on entertainment and variety content. Occasionally they have broadcasted series, miniseries or national unitaries produced with state funds. Finally, TV Pública is a regular fiction broadcaster, sometimes as part of its programming policies, as in the cases of *El Marginal* (2016, 2018 and 2019) or the period serial *Cuéntame Cómo Pasó* (2017), but it usually serves as a screen for the broadcasting of miniseries and unitaries produced with different funds for the promotion of audiovisual production granted by the National State to independent production companies as part of a cultural and industrial policy to promote this activity in the country, fictions that are also part of the national audiovisual repository also available on other screens.

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

Channel	Rating Household	%	Share (%)
Telefe	8,1	44,7	14,0
El Trece	4,8	26,2	8,3
América	2,4	13,1	4,1
El Nueve	1,9	10,8	3,4
TV Pública	0,6	3,6	1,2
Net TV	0,2	1,3	0,4
Bravo TV	0,1	0,5	0,1
TOTAL	18,1	100	31,6

Source: Kantar Ibope Media and Obitel Argentina



Source: Kantar Ibope Media and Obitel Argentina

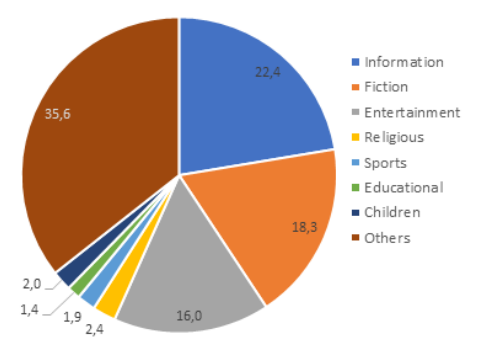
As in the previous year, the audience levels of the main open television channels remained relatively stable or with marginal downward variations. The sum of the ratings of the seven channels observed reached 18.1 points, just below the 19.3 of 2022. In terms of share, open television channels went from 33.2 to 31.6 in the same period. This year, Telefe came closer to doubling El Trece in rating and share, leaving behind a traditional competition of equals of more than two decades. The leading channel was favored by the broadcasting of the finale of the reality show *Gran Hermano*, which peaked at 30.9 rating points, the acquisition of rights to broadcast the local Martín Fierro awards to the radio and television industry, and the premiere of international entertainment formats with good performance, such as *The Challenge*, *Got Talent*, *Master Chef*, *Escape Perfecto* and some sports broadcasts.

The dispute for third place between América and El Nueve, which in recent years had been evenly matched, was resolved this year in favor of the former. In particular, as from September, América’s numbers distanced itself from its direct competitor, largely due to the arrival of Marcelo Tinelli, a popular local host who hosted the reality show *Bailando 2023*, obtaining discrete numbers in relation to his own past, but above the broadcaster’s average. TV Pública, which in 2022 and thanks to the broadcasting of the World Cup in Qatar had managed to recover the annual average point, fell again to 0.6. This happens even though 12 of the 35 most watched TV broadcasts of the year took place on the screen of the state channel with high ratings, always above double digits. In all cases, these were soccer matches of the national men’s first division, which, however, did not allow the public channel to improve its overall numbers. Net TV and Bravo TV of Grupo Perfil remain as low-cost proposals, with programming mainly based on the broadcasting of some live variety programs and reruns of Latin American telenovelas, which do not manage to gather a significant audience.

Graph 2: Genres and hours broadcast in TV programming

Broadcast genres	Broadcast hours	%
News	12964	22,4
Fiction	10622	18,3
Entertainment	9281	16,0
Religion	1383	2,4
Sports	1096	1,9
Education	787	1,4
Children	1183	2,0
Others	20644	35,6
TOTAL	57960	100

Source: Kantar Ibope Media and Obitel Argentina



Source: Kantar Ibope Media and Obitel Argentina

The total hours broadcasted by the seven channels observed increased by 4.8% due to the full incorporation of a new channel, Bravo TV, which had started broadcasting in May 2022. In percentage terms, there were no significant variations in the participation of each genre in the total hours broadcast, with the only exception of fiction. This item went from representing 15.5% of the total, with 8592 hours broadcast in 2022, to 18.3% in 2023, with 10622 hours. The increase is due to the return of long-form fiction to El Trece, but mainly to the contribution of NetTV and BravoTV, which base most of their programming on reruns of Latin American telenovelas.

1.2. Pay TV and VoD platforms in Argentina in 2023

According to data from the Ente Nacional de Comunicaciones (ENaCom) for the third quarter of 2023, 64.33% of Argentine households had some kind of pay TV service. This is a year-on-year drop of almost 3% from the 67.24% reported for the same period of the previous year. It is also a downward trend that has continued over the last three years. Most of the connections were made through physical links, while satellite technology captures a smaller market share of 11.5%. 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 region. The pay TV market is strongly concentrated mainly in Personal-Flow (managed by the merged Telecom-Clarín Group), with 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.

Chart 2. Most watched pay TV channels in Argentina 2023

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

Source: Kantar Ibope Media and Obitel Argentina

The first three places among the most watched pay TV channels do not present any new developments with respect to the previous year. TN (Grupo Clarín), C5N (Grupo Indalo) and LN+ (La Nación), whose programming focuses on information, analysis, opinion and political debate, grew in audience and remained as the most watched stations. This growth may be due to the fact that 2023 was a year of intense electoral activity at the national level, which lasted from August with the primary elections to November with the presidential runoff; later, on December 10, with the inauguration of Javier Milei as president.

According to Daxaxis data for the first four-month period of 2023, the video platforms market in Argentina was led by Netflix (35.8%), followed by Disney+ (15.4%), HBO Max (13%), Star+ (12.8%) and Prime Video (10.9%). Since 2018 and increasingly, all these companies have ventured into the production of local serialized fiction to the point that they are currently practically the only players in the audiovisual system in charge of this function.

1.3. Sources of financing for the audiovisual sector

According to the Argentine Chamber of Media Agencies (CAAM), the data for 2023

(...) evidencian el discreto movimiento del mercado publicitario sin crecimiento genuino de la inversión en medios en 2023, si observamos que la tasa de crecimiento en pesos está en la mitad del índice de inflación interanual del 211,4%. Sumado esto a la actualización del tipo de cambio de diciembre que llegó a 2,5 veces versus el promedio de los 10 primeros meses del año.

En términos de inversión publicitaria, se pudo ver una caída en el volumen esperado para el 2do semestre, en comparación con el peso en el año y asimismo podemos ver cómo contribuyó a la modificación de los shares de los sistemas, sobre todo en la TV. (...) Se observa la tendencia en alza de las inversiones en medios y plataformas digitales con un crecimiento en inversión por arriba del promedio⁷.

According to data from this Chamber, which gathers the main media agencies operating in the country⁸, the advertising market was impacted by the economic crisis that Argentina is going through. In turn, the data show that television in particular lost 23% of its share in total investment measured in dollars. In 2022 this medium had received USD 501 million, while last year it fell to USD 383.8 million. Television is the only medium where advertising investment is contracting, together with Digital, which loses only 6% but leads the total share, which stands at 42.8% of the total, against 34.7% for television.

In turn, between January and October 2023, the National Government had invested AR\$40,244 million in official advertising. As for its distribution

En términos individuales, 2023 presenta una novedad: por primera vez el destinatario que más publicidad recibió no es un medio tradicional. YouTube con \$1.079 millones es individualmente el más pautaado. El podio lo completan Telefe de Buenos Aires (\$907 millones) e Infobae (\$876 millones)⁹.

⁷ “(...) evidences the discreet movement of the advertising market with no genuine growth in media investment in 2023, if we observe that the growth rate in pesos is half of the year-on-year inflation rate of 211.4%. Add this to the December exchange rate update that reached 2.5 times versus the average of the first 10 months of the year.

In terms of advertising investment, we could see a drop in the volume expected for the second half of the year, compared to the peso in the year, and we can also see how it contributed to the change in the shares of the systems, especially in TV. (...) We can see the upward trend of investments in media and digital platforms with a growth in investment above average”. Available in March 20204 at <https://www.agenciasdemedios.com.ar/inversiones-publicitarias/>

⁸ Anunciar, Carat, Havas, Ignis, EssenceMediacom, Initiative, Midios, Mindshare, OMD, PHD, Quiroga, Starcom, UM, WaveMaker y Zenith.

⁹ “In individual terms, 2023 presents a novelty: for the first time, the recipient that received the most advertising is not a traditional medium. YouTube, with \$1,079 million, is individually the most advertised. The podium is completed by Telefe from Buenos Aires (\$907 million) and Infobae (\$876 million)”. Available in March 2024 at https://www.eldiarioar.com/opinion/clarin-indalo-octubre-cabeza-distribuyo-pauta-oficial-ultimo-alberto-fernandez_129_10767506.html

The new government of Javier Milei (La Libertad Avanza) announced the suspension of official advertising for one year. It did so through Decree No. 89/2023 published on December 26, 2023, although it leaves out of the scope of the measure numerous decentralized agencies and state-owned companies that may continue to invest in advertising in the media.

1.4. Communication policies

The year 2023 was one of low intensity for communication policies, in a context where the political agenda was focused on the extensive electoral campaign that occupied almost the entire second half of the year. Probably the most significant event was the delayed spectrum auction for the provision of 5G services that the government carried out in October, two months before leaving office¹⁰. The auctioned frequencies were left in the hands of the three main telecommunications companies operating in the country, Claro (AMX), Telecom and Telefónica, which invested USD 875 million to exploit this resource for the next 20 years.

At the end of 2023, the new government issued a Decree of Necessity and Urgency (70/2023) that addresses a wide range of issues, among them, relaxes some limitations still existing regarding the operation of audiovisual services licenses by the same holder, allows companies that provide satellite services to enter the subscription television sector and facilitates the entry of foreign satellite services players, such as Elon Musk's Starlink company, explicitly mentioned by the President of the Nation¹¹.

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 national penetration that exceeds 100% in almost all regions of the country, and a national average of 130.9% according to ENaCom data for the third quarter of 2023¹². As of September 2023, there were 61.1 million mobile accesses in the country, out of a population of 46 million. However, more than 50% of active mobile lines are prepaid, usually more widely used among lower middle socioeconomic sectors. The deployment of 4G technology has grown rapidly in recent years, reaching a wide coverage of the territory. Regarding broadband at home, the average penetration at national level reaches 77.84% of the country's households, an increase of 1% compared to the same period in 2022. 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,

¹⁰ Available in March 2024 at 2024 at https://www.enacom.gob.ar/institucional/el-estado-argentino-licito-la-banda-5g-por-mas-de-875-millones-de-dolares_n4578

¹¹ Source and topic extension at <https://martinbecerra.wordpress.com/2024/03/14/premios-y-castigos-por-decreto/>

¹² Available in March 2024 at <https://indicadores.enacom.gob.ar/Informes>

Mendoza, San Juan and Santa Cruz, where this figure is around 50% of households.

Although the national average speed is 129.67 Mbps (a significant growth compared to 62.46 Mbps in 2022) and offers of access at more than 30 Mbps are common, almost 30% of domestic connections are concentrated in the sub-30 Mbps speed range, with large variations available depending on the province. As for the type of technology, cable modem largely dominates (41.7%), but fiber-to-the-home connections have grown in recent years to reach 25.3% in 2023. The territorial extension added to the dispersion of the population in rural areas or in small urban concentrations, combined with the absence or low quality of connectivity infrastructure in some regions and economic difficulties, impede Internet access. The absence of the market and the state in some areas of the country has allowed the deployment of telecommunications cooperatives and, in a more experimental way, the emergence of community internet access networks self-managed by the inhabitants themselves. At the close of this chapter, Starlink, Elon Musk's satellite broadband company, was already offering its service in the country, targeting a productive segment or private users far from urban centers¹³.

¹³ Source and topic extension at <https://www.pagina12.com.ar/724404-starlink-ya-llego-a-la-argentina-precio-mensual-del-servicio>

2. Year in Review: National and Ibero-American release fiction in 2023

TABLE 1. Release fiction productions exhibited in 2023
(domestic, foreign Obitel films and co-productions)

UNRELEASED NATIONAL PRODUCTIONS – 10	UNRELEASED IMPORTED PRODUCTIONS – 6
El Trece – 6 national productions 1. <i>Argentina Tierra de Amor y Venganza</i> (telenovela) 2. <i>Buenos Chicos</i> (telenovela) 3. <i>Diciembre 2001</i> (miniseries) 4. <i>El Encargado 2</i> (miniseries) 5. <i>Los Protectores 2</i> (miniseries) 6. <i>Planners</i> (miniseries)	Telefe-2 productions 1. <i>Café con Aroma de Mujer</i> (telenovela – Colombia) 2. <i>Pantanal</i> (telenovela – Brazil) Net TV- 2 productions 3. <i>Cuna de Lobos</i> (Telenovela – Mexico) 4. <i>Raphael</i> (Miniseries – Spain)
El Nueve – 1 national production 7. <i>Familia de Diván</i> (miniseries)	Bravo TV – 1 production 5. <i>Enfermeras</i> (telenovela – Colombia)
América – 1 national production 8. <i>Médoly. La chica del Metro</i> (miniseries)	El Trece –1 production 6. <i>Mi Fortuna es Amarte</i> (telenovela – Mexico)
TV Pública - 2 national productions 9. <i>La Bellas Almas de los Verdugos</i> (miniseries) 10. <i>Madame Requin</i> (miniseries)	El Nueve - 0 productions
Telefé – 0 productions	América – 0 productions
Net TV – 0 productions	TV Pública – 0 productions
Bravo TV – 0 productions	TOTAL UNREALEASED PRODUCTIONS: 17
CO-PRODUCTIONS – 1	
TV Pública - 1 coproduction 11. <i>Los Mil Días de Allende</i> (Miniseries – Chile, Argentina and Spain)	

Source: Obitel Argentina

The number of unreleased domestic and imported productions remains at 17, as in the previous two years, as well as the number of Argentine productions, which remains at 10, the same as in 2022. This happens thanks to the use of the linear screen for the release of one or two chapters as a promotional mode of series that later become part of the catalogs of different video-on-demand platforms. This year, the alliance between El Trece and Star+ continues, which allowed the premiere of the first episodes of the series *Diciembre 2001*, *El Encargado 2*, *Los Protectores 2* and *Planners* on open television. On the other hand, original platform series were later broadcast in their entirety on open television. This is the case of *Melody, la chica del*

metro (Prime Video - El Nueve) and *Familia de Diván*¹⁴ (Flow - El Nueve). Telefe was the only open channel that did not release national fiction, an unprecedented fact. The leading audience channel continues, 10 years after the beginning of the phenomenon, to program Turkish telenovelas: it broadcast eight productions, in some cases continuations of the previous year, such as *Llamas del Destino*, *Nuestro Amor Eterno*, *Todo por mi Hogar*, *Traicionada y Traicionada II*, *Eda y Serkan*, *Huérfanas* and *Amor de Familia*, all of them in the afternoon. On the other hand, TV Pública premiered two short-lived national fictions and was the local screen for the co-production *Los Mil Días de Allende*, created to commemorate the 50th anniversary of the 1973 military coup in Chile.

TABLE 1b. Exhibition of repeat productions in 2023
(domestic, foreign Obitel titles and co-productions)

REPEAT NATIONAL PRODUCTIONS – 2	REPEAT IMPORTED PRODUCTIONS - 16
Telefe - 1 national production 1. <i>Casados con Hijos</i> (series - Argentina)	Net TV- 9 productions 3. <i>El Cuerpo del Deseo</i> (telenovela – Hispanic US) 4. <i>El Patrón del Mal</i> (serie – Colombia) 5. <i>El Señor de los Cielos</i> (telenovela – Hispanic US) 6. <i>La Esclava Blanca</i> (telenovela – Colombia) 7. <i>La Reina del Flow 2</i> (telenovela – Colombia) 8. <i>La Usurpadora</i> (telenovela – Mexico) 9. <i>Pulseras Rojas</i> (series – Spain) 10. <i>Rosario Tijeras</i> (telenovela – Mexico) 11. <i>Rubí</i> (telenovela – Mexico)
TV Pública - 4 productions 2. <i>Combatientes</i> (miniseries – Argentina)	Bravo TV – 6 productions 12. <i>Avenida Brasil</i> (telenovela – Brazil) 13. <i>Destilando Amor</i> (telenovela – Mexico) 14. <i>Esmeralda</i> (telenovela – Mexico) 15. <i>La Venganza de Analía</i> (telenovela – Colombia) 16. <i>Primera Dama</i> (telenovela – Colombia) 17. <i>Los herederos del Monte</i> (telenovela – Colombia, Hispanic US)
El Trece – 0 productions	Telefe – 1 production 18. <i>María la del Barrio</i> (telenovela – Mexico)
El Nueve – 0 productions	El Nueve - 0 productions
América – 0 productions	América – 0 productions
Net TV – 0 productions	TV Pública –0 productions
Bravo TV – 0 productions	El Trece – productions
COPRODUCTIONS – 0	TOTAL REPEAT PRODUCTIONS: 18

Source: Obitel Argentina

¹⁴ In 2023 El Nueve released a single episode of this original series of Flow (Personal) but with continuity in 2024.

In 2023, 18 reruns were broadcast, compared to 20 in the previous year. Most of them are explained by the programming strategy of Net TV and Bravo TV (large number of telenovelas from Obitel countries). Both channels owned by the same company seem to have a coordinated programming strategy, which is why some reruns that in 2022 were seen on Bravo TV moved to Net TV last year. These are classic Latin American fictions already seen on numerous occasions in different open television channels: *Rubí*, *Rosario Tijeras*, *La Usurpadora*, *El Patrón del Mal*. *Avenida Brasil* (Bravo TV) was broadcast in its entirety in the morning with repeats in the afternoon and also on weekends. In addition to the reruns of already classic productions, *Telefe* made a nostalgic rescue of *María, la del barrio* by airing some chapters of the 1990s telenovela on Sunday afternoons. These strategies help to explain the increase of fiction as a genre in the total share of hours broadcast by open television.

**TABLE 2. Formats of release national fiction in 2023
and its evolution in the five-year period.**

Format	Productions						Hours					
	2019	2020	2021	2022	2023	Total	2019	2020	2021	2022	2023	Total
Telenovela	4	1	1	2	2	10	289:30	35:00	72:10	115:05	199:30	711:15
Series	5	0	2	0	6	13	38:00	0:00	14:10	0:00	17:35	69:45
Miniseries	8	4	5	9	3	29	36:30	26:45	17:00	28:55	12:10	121:20
Sitcom	1	0	0	0	0	1	0:00	0:00	0:00	0:00	0:00	0:00
Unitary	0	0	0	0	0	0	7:40	0:00	0:00	0:00	0:00	7:40
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	18	5	8	11	11	53	371:40	61:45	103:20	144:00	229:15	910:00

Source: Kantar Ibope Media and ObitelArgentina

The evolution of formats in the last five years shows the quasi-disappearance of the national release telenovela from the open television screen, which this year, despite a small rebound, is far from its best times. Short formats (series and miniseries) add up in number of productions and allow to match the numbers but not the amount of hours of 2022. This is not only due to the characteristics of this type of content, but also because only one or two episodes of series that are actually exclusive to platforms are broadcast as promotional material, so the numbers of short formats in the table above appear artificially high.

TABLE 3. Release fiction screened in 2023: countries of origin

Country	Productions	%	Hours	%
NATIONAL (total)	11	65	229:15	35
OBITEL COUNTRIES (total)	6	35	433:45	65
Argentina	11	65	229:15	35
Brazil	1	6	114:15	17
Chile	0	0	0:00	0
Colombia	2	12	281:40	42
Ecuador	0	0	0:00	0
Spain	1	6	1:50	0
Hispanic US	0	0	0:00	0
Mexico	2	12	36:00	5
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)	1	6	4:20	1
National co-productions	1	6	4:20	1
Obitel countries co-productions	0	0	0:00	0
TOTAL	17	100	663:00	100

Source: Kantar Ibope Media and ObitelArgentina

Considering the historical minimum of hours that took place in the 2020-2021 biennium, the years of the pandemic, a slight recovery is noticed, but it is not enough to remove the country from the list of markets with low production capacity. Obitel release fiction hours fell by half this year, from 831 in 2022 to 433 in 2023. This is partly explained by Telefe’s lower interest in fiction in general and its sustained bet on those of Turkish origin. Also, the list of countries of origin of imported fiction was reduced to a small group: Brazil, Colombia, Spain and Mexico.

TABLE 4. Formats of national and Ibero-American fiction screened in 2023

Format	Productions				Hours			
	Nationals	%	Remaining Obitel	%	Nationals	%	Remaining Obitel	%
Telenovela	2	18,2	5	83,3	199:30	87,0	431:55	99,6
Series	6	54,5	0	0,0	17:35	7,7	0:00	0,0
Miniseries	3	27,3	1	16,7	12:10	5,3	1:50	0,4
Sitcom	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	100,0	6	100,0	229:15	100,0	433:45	100,0

Source: Kantar Ibope Media and ObitelArgentina

As the table above shows, in the field of Argentine fiction, the release of short-format productions is preponderant. In the case of national telenovelas, two national

releases are reported this year, although the outlook for the future is not encouraging (absence of fiction projects in Pol-ka, good performance that Telefe obtains with international entertainment formats). As usual, in the opposite direction, imports of productions from the Obitel area are almost exclusively concentrated in telenovelas.

TABLE 5: Top 10 Most watched productions in 2023

Production		Channel	Production company (Country)	Format/genre	No. of episodes 2023	Time slot	Rating	Share
1	<i>Pantanal</i>	Telefe	Globo (BR)	Telenovela	86	Prime Time	9,7	14,5
2	<i>El Encargado 2</i>	El Trece	Pampa Films, Star+ (AR)	Series	1	Prime Time	8,4	12,4
3	<i>Los Protectores 2</i>	El Trece	Kapow, Star+ (AR)	Series	1	Prime Time	6,2	10,2
4	<i>Caf� con Aroma de Mujer</i>	Telefe	RCN (CO)	Telenovela	25	Noon	5,9	12,4
5	<i>Diciembre 2001</i>	El Trece	Kapow, Star+ (AR)	Series	1	Prime Time	5,9	10,5
6	<i>Argentina Tierra De Amor y Venganza</i>	El Trece	Pol-ka (AR)	Telenovela	125	Prime Time	5,5	10,3
7	<i>Buenos Chicos</i>	El Trece	Pol-ka (AR)	Telenovela	79	Prime Time	5,3	9,2
8	<i>Planners</i>	El Trece	PegsaGroup, Star+ (AR)	Series	1	Prime Time	5,1	7,5
9	<i>Mi Fortuna es Amarte</i>	El Trece	Televisa (MX)	Telenovela	5	Noon	2,2	5,0
10	<i>Familia de Div�n</i>	El Nueve	Flow (AR)	Series	1	Prime Time	1,1	2,1
Total national productions: 7				Foreign original scripts: 3				
70%				30%				

Source: Kantar Ibope Media and ObitelArgentina

Once again, a Brazilian production, the remake of the classic *Pantanal*, is in first place, although with a rating below double digits. The new version of *Caf  con Aroma de Mujer* (Colombia) and *Mi Fortuna es Amarte* (Mexico) joined the imported productions in this year’s top ten. This last case is striking because the telenovela, which has a length of over 90 episodes, was aired for only one week in January 2023 on El Trece and was cancelled due to low ratings.

TABLE 5a: Top 10 Most watched national productions in 2023

Production		Channel	Production company (country)	Format/genre	No. of episodes 2023	Time slot	Rating	Share
1	<i>El Encargado 2</i>	El Trece	Pampa Films, Star+ (AR)	Series	1	Prime Time	8,4	12,4
2	<i>Los Protectores 2</i>	El Trece	Kapow, Star+ (AR)	Series	1	Prime Time	6,2	10,2
3	<i>Diciembre 2001</i>	El Trece	Kapow, Star+ (AR)	Series	1	Prime Time	5,9	10,5
4	<i>Argentina Tierra De Amor y Venganza</i>	El Trece	Pol-ka (AR)	Telenovela	125	Prime Time	5,5	10,3
5	<i>Buenos Chicos</i>	El Trece	Pol-ka (AR)	Telenovela	79	Prime Time	5,3	9,2
6	<i>Planners</i>	El Trece	PegsaGroup, Star+ (AR)	Series	1	Prime Time	5,1	7,5
7	<i>Familia de Diván</i>	El Nueve	Flow (AR)	Series	1	Prime Time	1,1	2,1
8	<i>Melody, la Chica del Metro</i>	América	Warner Music, Prime Video (AR)	Series	12	Morning	0,4	1,1
9	<i>Madame Requin</i>	TV Pública	3C Films Group (AR)	Miniseries	5	Prime Time	0,4	0,6
10	<i>Los mil días de Allende</i>	TV Pública	Parox, Mediterráneo, Aleph, Mente Colectiva y HD Argentina.	Miniseries	4	Prime Time	0,3	0,4
Total national productions: 9					Original foreign scripts: 1			
90%					10%			

Source: Kantar Ibope Media and ObitelArgentina

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 place national fiction productions among the most watched of the year given the generalized drop in audience and the lower offer of this type of contents. Indeed, series such as *Mélody, la chica del metro* (América), *Madame Requin* (TV Pública) and *Los Mil Días de Allende* (TV Pública) enter the national top ten with figures well below the average rating point.

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

Production		Channel	Gender %		NSE%			
			Female	Male	ABC1	C2	C3	D
1	<i>Pantanal</i>	Telefe	60,4	39,6	15,7	18,4	24,3	41,6
2	<i>El Encargado 2</i>	El Trece	56,8	43,2	11,9	29,5	32,4	26,2
3	<i>Los Protectores</i>	El Trece	49,3	50,7	18,5	17,7	39,3	24,6
4	<i>Café con Aroma de Mujer</i>	Telefe	63,2	36,8	14,7	21,9	21,8	41,7
5	<i>Diciembre 2001</i>	El Trece	49,6	50,4	3,1	35,3	26,3	35,3
6	<i>Argentina Tierra de Amor y Venganza</i>	El Trece	56,6	43,4	17,0	27,6	26,8	28,6
7	<i>Buenos Chicos</i>	El Trece	54,1	45,9	8,7	26,9	31,4	33,1
8	<i>Planners</i>	El Trece	53,7	46,3	29,7	6,0	31,6	32,8
9	<i>Mi Fortuna es Amarte</i>	El Trece	60,7	39,3	8,1	38,2	24,5	29,2
10	<i>Familia de Diván</i>	El Nueve	52,5	47,5	0,0	20,9	29,9	49,3

Production		Age %				
		04 - 12	13-19	20-24	35-44	45+
1	<i>Pantanal</i>	14,0	15,3	28,3	19,3	23,1
2	<i>El Encargado 2</i>	5,8	23,9	20,1	17,1	33,1
3	<i>Los Protectores</i>	13,6	17,1	17,5	20,7	31,1
4	<i>Café con Aroma de Mujer</i>	13,4	16,1	32,3	21,6	16,5
5	<i>Diciembre 2001</i>	19,4	11,1	14,1	24,7	30,6
6	<i>Argentina Tierra de Amor y Venganza</i>	11,7	15,6	20,8	19,5	32,3
7	<i>Buenos Chicos</i>	12,7	22,3	21,2	17,0	26,9
8	<i>Planners</i>	9,2	21,3	32,4	11,1	25,9
9	<i>Mi Fortuna es Amarte</i>	8,6	15,6	20,4	22,5	32,8
10	<i>Familia de Diván</i>	0,0	33,3	6,2	27,8	32,6

Source: Kantar Ibope Media and Obitel Argentina

As for the audience profile, there are no major novelties. Regarding gender, women are in the majority in almost all cases, with exceptions such as *Los Protectores 2* and *Diciembre 2001*. In these two cases, the themes related to soccer and national politics, respectively, summon more male audience and show an audience with greater gender parity. Viewed by socioeconomic level, fiction on open television is mostly consumed by audiences with middle and low income. This year, as in previous years, Brazilian fictions with a biblical theme, which concentrated the majority of the audience’s attention in the lower socioeconomic level segments, were not programmed. Telenovelas such as *Pantanal* or *Café con Aroma de Mujer*, 40% of whose audience belongs to the NSE D segment, took that place.

3. VoD Monitoring 2023

During 2023, the phenomenon pointed out in previous years referred to the displacement of national fiction towards video-on-demand platforms that adopted it as a function of their own. The main global platforms operating in the country, Netflix, Prime Video, Star+, Disney+, HBO+ together produce a number of national productions that far exceeds the meager offer of open television for this category. Since 2018 when Netflix premiered *Edha*, the first Argentine fiction made for a platform, the number of releases has increased to 20 in 2023. Thus, national releases in VoD services (20) once again surpassed those of open television (11). However, of these 11, only four are titles conceived for traditional television, so it is clear that national production is almost entirely linked to the production processes that the platforms command.

3.1 VoD platform market in 2023

The VoD platform market did not show significant modifications in 2023 in Argentina. Increasingly, all companies have ventured into the production of local serialized fiction to the point that they are currently practically the only players in the audiovisual system in charge of this function. 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 (Movistar TV, Telecentro Play, Claro Video, DirecTVGo) have not yet ventured into the production of original national fictions.

3.2. Supply of local VoD platforms in 2023 (national, regional in-country)

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 find the platforms of the National State. Cont.ar, dependent on the state-owned company Contenidos Públicos Sociedad del Estado, is a reversion of a predecessor, Contenidos Digitales Abiertos (CDA) from 2011, which operates free of charge (FVOD) and includes in its catalog a significant number of national series, particularly those made with state support. It is also a space where access to live streaming transmissions of all public channels (TV Pública, Encuentro, PakaPaka, DeporTV), Radio Nacional and other cultural contents converge. For its part, Cine.ar Play, managed by the Instituto Nacional de Cine y Artes Audiovisuales (INCAA) has been operating since 2015 (formerly under the brand Odeon) and offers mainly short fiction, films and documentaries with free access or in pay-per-transaction mode (TVOD).

The government that took office in December has established that the state-owned companies that manage state-owned channels, radios and platforms are intervened by the National Executive Power, their boards of directors were dissolved, and their future seems uncertain at the closing of this chapter.

3.3. VoD analysis in 2023: national release fiction and co-productions.

In 2023, the five main global video platforms released, together with Flow, a total of 20 national serialized fiction productions, the highest number since these services have been producing fictional content in the country. This is evidence of a greater interest of global streaming platforms in producing Argentine content 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.

TABLE 7. National fiction and co-productions exhibited in VoD systems in 2023

NATIONAL PRODUCTIONS	RELEASE	RELEASE CO-PRODUCTIONS
Prime Video (2)		HBO (1)
01. <i>Iosi, el Espía Arrepentido</i> (series – 2nd season)		01. <i>Tè quiero y me duele</i> (miniseries - Mexico)
02. <i>Melody, la Chica del Metro</i> (miniseries)		Disney (2)
HBO Max (2)		02. <i>C.H.U.E.C.O.</i> (miniserie - Mexico)
03. <i>Días de Gallos</i> (series - 2nd season)		03. <i>Una Navidad para C.H.U.E.C.O</i> (special - Mexico)
04. <i>El Jardín de Bronce</i> (series – 3rd season)		Prime Video (1)
Netflix (3)		01. <i>Barrabrava</i> (miniseries)
05. <i>División Palermo</i> (miniseries)		
06. <i>El Reino</i> (series – 2nd season)		
07. <i>El Amor Después del Amor</i> (miniseries)		
Flow (4)		
08. <i>Familia de Diván</i> (miniseries)		
09. <i>Gamer, una Vida Más</i> (miniseries)		
10. <i>Parte de una Religión</i> (miniseries)		
11. <i>Frágiles</i> (miniseries)		
Disney (2)		
12. <i>Entrelazados</i> (serie - 2nd season)		
13. <i>FreeKs</i> (miniseries)		
Star+ (6)		
14. <i>Ringo. Gloria y Muerte</i> (miniseries)		
15. <i>Planners</i> (miniseries)		
16. <i>Diciembre 2001</i> (miniseries)		
17. <i>Los Protectores</i> (series - 2nd season)		
18. <i>Nada</i> (miniseries)		
19. <i>El Encargado</i> (series - 2nd season)		
Total: 19		Total: 4

Source: Obitel Argentina

First to establish itself in the market in 2011 and to produce national content in 2018, Netflix has since released 13 original productions, a number similar to what Star+ achieved in just three years with an aggressive content production policy in Argentina. The rest of the platforms released at least two to four Argentine productions in 2023. All of them are miniseries of between 8 and 13 episodes.

3.4. Características narrativas del VoD en 2023

In 2023, second seasons of *Iosi, el espía arrepentido* (Prime Video), *El Reino* (Netflix), *Entrelazados* (Disney+), *Los Protectores* (Star+) and *El Encargado* (Star+) and the third season of *El Jardín De Bronce* (HBO) were released. The continuity of some productions with new seasons may be an indicator of their good performance, given the absence of reliable measurements on the consumption of these series on each platform.

The phenomenon of series based on the lives of celebrities from the world of music, politics or sports had its continuation with the release of the miniseries on the life of musician Rodolfo 'Fito' Paez *El Amor Después del Amor* (Netflix) and *Ringo. Gloria y Muerte* (Star+), which portrays the life of boxer Oscar 'Ringo' Bonavena. Also, about political events in recent national history, the miniseries *Diciembre 2001* (Star+), which recounts the moments leading up to the fall of Fernando De la Rúa's government and the concomitant social outbreak, stands out.

Two series had a special impact on the media conversation: one, the comedy *División Palermo* (Netflix), which tells the story of a group of people who join a group for the prevention of infractions and minor crimes called by the government of the city of Buenos Aires. All of them have in common their belonging to a minority usually discriminated against. The comedy deals ironically with the absurdities of forced and artificial inclusion in the working world. The other, *Nada* (Star+), stood out for its careful staging, the exaltation of the most attractive spots in Buenos Aires, and in particular the participation of Robert De Niro in a supporting role, which nevertheless required the American actor's visit to the country to film some scenes.

Prime Video, Flow and Disney+, on the other hand, offered at least one locally produced release series for young and pre-teen audiences. The acquisition of distribution rights for the telenovela *Floricienta* (2004-2005), which was incorporated into HBO's catalog (now renamed Max), is along the same trend. According to the report "What We Watched: A Netflix Engagement Report", which lists the most watched series and movies globally in the first half of 2023, the Argentine children's series *GO! Vive a tu manera* (2019) is the second most watched national content on that platform (17,800,000 viewing hours) just behind *El Amor Después del Amor* (2023), which reached 21 million viewing hours in two months.

4. Interactivity and audience participation

In the context of the growing offer of series and miniseries in streaming or VOD platforms, a miniseries with high media impact and very modest repercussion in social networks at the time of its release was selected for analysis. However, the miniseries *División Palermo* (Netflix) became a sort of cultural reference for scenes that comment on the political reality of our country. It is a comedy that narrates the actions carried out by a special division of the local police. Its particularity is that it is proposed as an institutional tool to revert the discriminatory image of the police force. To this end, all its participants represent a minority (people with motor disabilities, people of short stature, people of retirement age, people with some maturity retardation, etc.).

This proposal assumes that, as stated by Alejandro Modarelli (2023)

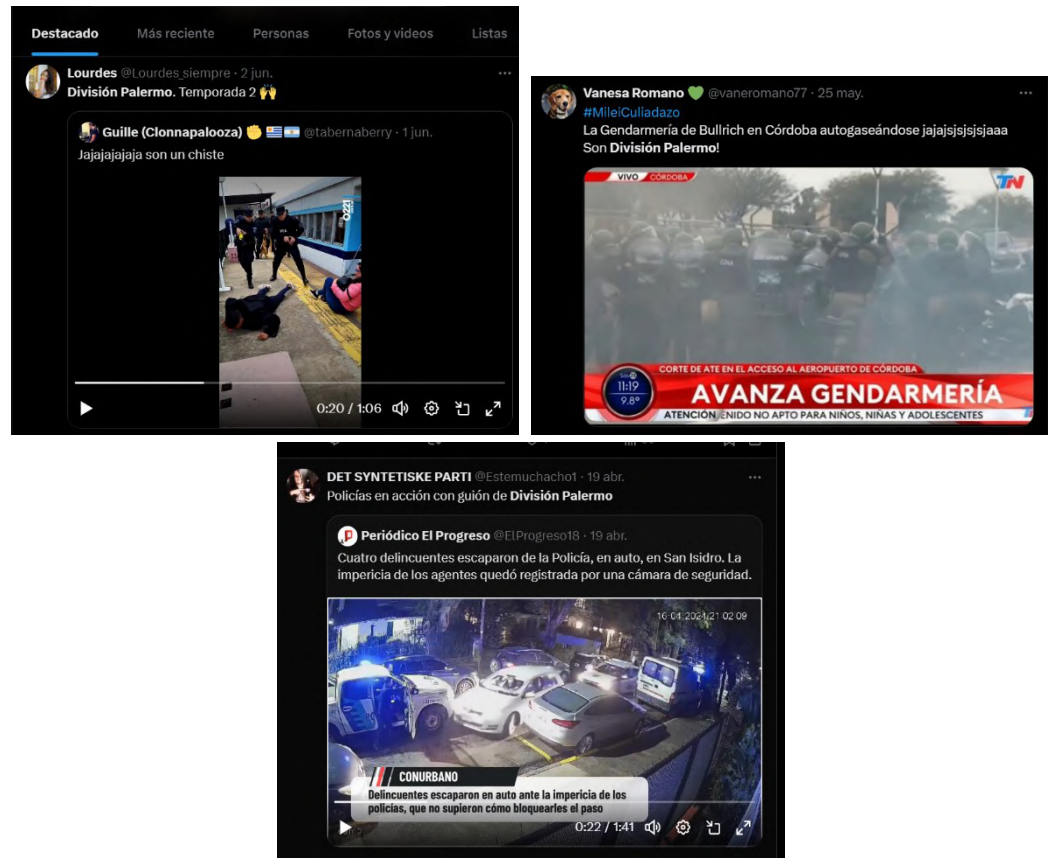
La corrección política, y la incorrección, no son apenas las dos caras de una misma moneda sino un debate social y cultural sobre la libertad de expresión en el que estamos inmersos desde hace décadas. Y recrudece cuando la única revolución posible pareciera ser la de las formas, y las bastillas urgentes por tomar son los medios de comunicación o los libros para las infancias. El éxito de la serie *División Palermo* en Netflix -una Guardia Urbana formada por friquis contratados en la ciudad neoliberal como instrumentos de maquillaje de las verdaderas políticas represivas- plantea la encrucijada del humor, donde un Micky Vainilla pudo ser celebrado, es lógico, por el progresismo de izquierda, pero a la vez sirvió, sin buscarlo, a la juventud reaccionaria como un espejo gracioso donde se reconocía muy a gusto. (S/P)¹⁵

Thus, *División Palermo* attacks in its narrative the progressive common sense, which strives for inclusion -in an extreme stance, everywhere-. Simultaneously, it also attacks a neoliberal government -very similar to that of the Autonomous City of Buenos Aires- that makes only politically correct decisions without effect. The strategies of the laughable (Fratlicelli 2023: 27) have been extended in contemporary mediatization.

¹⁵ Political correctness and incorrectness are not just two sides of the same coin, but a social and cultural debate on freedom of expression in which we have been immersed for decades. And it intensifies when the only possible revolution seems to be that of the forms, and the urgent bastilles to take are the media or books for children. The success of the series *División Palermo* on Netflix -an Urban Guard formed by freaks hired in the neoliberal city as make-up instruments of the real repressive policies- raises the crossroads of humor, where a Micky Vainilla could be celebrated, logically, by the progressive left, but at the same time served, without looking for it, to the reactionary youth as a funny mirror where they recognized themselves at ease. (S/P)



We said before that the repercussion in networks does not necessarily come from the series itself (which was awarded at the Platinum Awards and obtained a good level of audience and social conversation), but from the fiction. Many social actions reported are commented as belonging to “División Palermo”, either because of their precariousness or because of their mismatch with what is expected (because they are funny, exaggerated or clumsy). In this way, the reception is expressed by producing memes (Fratlicelli, 2023) extending the humor proposed by the fiction.



Thus, an X user commenting on the series relates it to the animated series *The Simpsons*, with an image showing a disuniformed group of Springfields bravely going on a mission that will fail due to the very makeup of the group.

But X users produce humor about humor: In one case, it is the retaking of the broadcasting of a training simulation of the Argentine Federal Police for the use of Taser guns. The staging and its rehearsal quality in terms of the failure itself and the lousiness of the scene makes a user relate what is filmed with a possible continuity of the fictional series. The same happens when the National Gendarmerie confronts demonstrators in the Province of Córdoba. In an attempt to disperse the demonstrators, the gendarmes fired tear gas without calculating that the wind blew the cloud towards them, so that the security forces themselves had to disperse. This circumstance generates a situation that is both funny in the retaking of the user of X and critical of the Minister of Security of the Nation (Patricia Bullrich). Finally, the clumsiness of the security forces in intercepting those who steal a car and escape driving on the sidewalk, despite being surrounded by security forces. For several X users this seems to be a fragment of the series, or even more, a joke discarded as implausible for fiction.

It is interesting to note that this group of posts are from the year 2024 and that the narrative, but above all, the playful-critical tone of the series is kept alive as a reading criterion by users to question reality.

5. Highlights of the year

In 2023, only two full-length fictions will be released for the linear screen and both were produced by Pol-ka and broadcast by El Trece. One of them, sequel to a hit; *Argentina. Tierra de amor y venganza*. The first part of the telenovela aired in 2019 came to average in total fiction 13.6 rating points with peaks of 17 points. Betting on the still fresh memory of the viewers of the first season, the second round of the period fiction did not obtain the expected results. As pointed out by Pablo Mascareño (2023) in *La Nación* newspaper, “ATAV 2 subió sus números cerrando su promedio en 6,2 puntos y tocando un máximo de 7,8 puntos. Si bien no son cifras demasiado altas, se trata de un considerable repunte para la única ficción de producción nacional actualmente en el aire de la TV abierta”¹⁶. (S/P) It was a period fiction that sought to include themes that allowed connecting the present with the past; being a narrative set in the 1980s, many of the characters recreated in the fiction are still part of the media universe. This quality increased the social conversation about the fiction, especially due to the representative adaptations of the characters anchored in well-known personalities.

These correlations were encouraged by the use of television archive material of the time and by the continuity of past events reconstructed in fiction. Thus, the interest was less in the melodramatic plot than in the possibility of judging the

¹⁶ ATAV 2 increased its numbers, closing its average at 6.2 points and reaching a maximum of 7.8 points. Although these are not very high figures, it is a considerable rebound for the only nationally produced fiction currently on broadcast TV.

veracity of the facts staged: the so-called “Vedette War” that took place in one of the TV lunches hosted by Mirtha Legrand recreated in fiction brought the protagonists of the fight at that time to the show programs, recalling the reasons, the past confrontations and whether the ways in which the original tense fight was expressed in ATAV2 were adjusted to the facts or not.

In an inflationary national context, with a fiction that bet on production quality and period reconstruction, the overall performance of the fiction was very poor. Nevertheless, Pol-ka sustained the more than one hundred chapters of the fiction.

From this point on, Pol-ka and El Trece change the bet. They produce a telenovela with police overtones featuring a choral cast characterized by the youth of its actors. It moves away from the usual melodramatic tone for telenovelas and seeks to seduce a younger audience. It is the story of a group of friends who, in order to avenge the attempted abuse of one of them, rob the house of the aggressor, who happens to be a thug, who, upon discovering the perpetrators of the robbery, extorts money from them to put them at his disposal. In the group of friends, now a labor force for crime, there is the son of a prosecutor, the daughter of a police commissioner, so that the threats of denunciation are always a possibility of narrative deterioration. At the same time, *Buenos Chicos* deals with multiple themes that are articulated with the social agenda and social merchandising: it narrates the gender transition of one of the members of the group -and the family’s rejection of their self-perception-, the unwanted pregnancy of another of the members, the difficulty of overcoming the alcoholism of two of the group’s fathers. In addition to the crimes to which the group of young people are subjected, other themes of the genre are also narrated: amorous deception, adultery, the difficulty of love’s correspondence and its triumph, in some cases.

This production ended up giving less results than expected (it averaged 5.3 rating points), which led Pol-ka to make the decision to discontinue fiction production since they had no projects for linear television fiction for 2024-2025. Thus, the main television fiction production company closes its doors, evidencing the catastrophic situation in which the industry finds itself.

As mentioned in previous years, the success of fictions for platforms and the shift of national fiction to fictions from other countries (especially Turkish) ended up leaving the linear screen without national fiction production.

6. Theme of the Year: What is happening with the narratives in Ibero-American television fiction?

In order to think about the ways in which Argentine fiction survives and its strategies to attract audiences, the following series released on VOD platforms will be analyzed:

Iosi, el espía arrepentido (series - 2nd season), Prime Video; *El Reino* (series - 2nd season) and *El Amor Después del Amor* (miniseries), Netflix; *Nada* (miniseries) and *El Encargado* (series - 2nd season) from Star+.

Three of those selected are continuity from previous seasons. But they are selected for the place and social repercussion they had as well as for the narrative diversity they present.

6.1 Characters

In the selection of series, we find a wide range of protagonists, from those who slightly cross fiction and non-fiction, as is the case of the second season of *Iosi, el espía arrepentido* which presents José “Iosi” Pérez (played by Gustavo Bassani), who infiltrates the Jewish community, initially pretends to be Jewish, but then adopts the religion (season 1) and marries a member of the community. He keeps secret his work as a spy for the Argentine Federal Police and tells the story of his participation in the bombing of the Israeli Mutual Amia on July 18, 1994 (two years after the bombing of the Israeli Embassy in Argentina), the role of the state in the sale of weapons to Ecuador, Croatia and Bosnia-Herzegovina during the presidency of Carlos Menem and produced by the state-owned Fabricaciones Militares. Both the reconstruction of the period and the characterization of the main characters realistically account for a set of common places linked to the perception of the Jewish community in Argentina, the intelligence services and power. As it is a fiction based on real events, both the characters and their physical environments build a strong realistic plausibility.

In a completely different narrative, *El amor después del amor* also presents a period reconstruction, with clearly identifiable characters, as it narrates the path to success of musician Rodolfo “Fito” Páez. In this case, as in *ATAV2*, controversy also arose over the fairness of the portrayals of the characters and their conflicts. The case of the singer Fabiana Cantilo, former partner of Páez who made statements against her portrayal as only his backup vocalist and dependent of the singer. So much so that Cantilo shared a video of her relationship with Páez during the 80’s saying “Antes de ir a girar por Europa, les dejo la posta”¹⁷. However, critics acclaimed the series and particularly the performances of its protagonists, both for their resemblance to the characters they play and for the period reconstruction. Once again, the correlation between fictional narrative based on real events and their correspondence with historical events are brought into play. The characters of both come out of the comparison with flying colors.

El Reino, *Nada* and *El encargado* are not presented by reworking characters or stories referenced as real. The characters play with a degree of eccentricity that distances them, in the first instance, from the temptation of similarity. Especially the

¹⁷ “Before going to tour Europe, I pass on the mantle to you”

case of the building manager, Eliseo -Guillermo Francella- in *El encargado* (2nd season). He is an apparently good and affable character who, in reality, takes advantage of his position and false helpfulness to profit in illegal ways (he rents the apartments of the building when their owners are not there, he takes deliveries that do not correspond to him, he sets traps to achieve his goals by deceiving the owners). On this occasion, the consortium hires Eliseo again, who, due to an inheritance, ends up being the owner as well. In this context, the conflicts become more hyperbolic, since he also decides as an employer about his work. The innocent mischief that Eliseo performs is what gives the series its laughable tone, which would otherwise turn into a cruel narrative.

In *Nada*, Luis Brandoni plays Manuel, a fussy, sybarite, upper-class art critic with no money. Nada narrates Manuel's misfortunes after the death of his employee, on whom he depended for everything in his life. He finds himself alone, clumsy and unable to continue his life, until Antonia (Majo Cabrera) shows up to work in his house. Despite Manuel's rejection, Antonia gradually earns her place and gains the affection of her employer. Manuel's misfortunes (economic, social and amorous) are threaded together by the presence of Vincent (Robert De Niro) who translates terms - generally localisms and insults - from Buenos Aires into English. Vincent visits Manuel in Buenos Aires and ends up winning over his ex-wife. Although he is a haughty, bohemian and well-to-do character, as might be imagined of a Buenos Aires elite of half a century ago, the appearance of the foreigner translating is a clear attempt to globalize the comedy.

For its part, *El reino* (2nd season) continues the story of Emilio Vázquez Peña (Diego Peretti) evangelical pastor and president of the republic, his wife Elena Vázquez Peña (Mercedes Morán) on the one hand, and Tadeo Vázquez (Peter Lanzani) and Johnatan (Uriel Nicolás Díaz) who return to the country, spreading the word and leading a socio-religious revolution. It is necessary to remember that Johnatan has performed miracles, but in the escape (end of the first season) he must hide his powers so as not to be discovered. The flight of Tadeo and Johnatan is the counterpart of Emilio's rise to power in the first season. In this one, the narrative arc tells the story of the fall of the pastor-president and the church managed by his wife in parallel with the social rebirth of Tadeo as a political-religious leader who opposes the violence established by the government. Although this story has no pretension of being linked to the events that took place and were denounced, some allegorical and comparative readings of the character of Emilio as a non-democratic and neo-liberal power-grabber have appeared with some characters of the Argentine reality.

In all cases, the main characters and most of the supporting characters are played by nationally and internationally renowned actors and actresses. This is an element of seduction for local and foreign markets, so that the platforms reinforce a local starsystem that guarantees a return on investment and attracts global audiences. Robert De Niro's inclusion strategy in *Nada* is an eloquent example.

6.2. Themes

The five fictions narrate very different themes, but it may be thought that there are some common places in *Nada* and *El encargado* (2nd season), for example, in relation to the characterization of the porteño as a lively character, given to certain minor corruption who takes advantage of it. *El Reino* (2nd season), in turn, presents a corrupt and degrading government, as opposed to the journey of the dispossessed, poor, from the interior of the country, who are honest, hard-working and carry the light and the word. This contrast alone makes the fiction evidences its manic and melodramatic character.

For its part, *El amor después del amor* is released in the same year that marks the 30th anniversary of the release of the homonymous album that launched Fito Páez to international stardom. The series accompanies the singer's tours (national and international). Likewise, the biopic continues the trend begun years ago with the stories of famous personalities (Maradona, Tevez, Sandro, Monzón, etc.), which have also been produced this year (Ringo. Gloria and Muerte by Star+). The presentation of Páez's early career themes migration, the initial difficulties to achieve recognition, and finally success, fame and love. In doing so, it also provides a glimpse into the lives of the artists who accompanied his path: Fabiana Cantilo, Carlos Baglietto, Charly García, Luis Alberto Spinetta, Cecilia Roth, among others.

The reconstruction of the past as a theme is dominant in *Iosi, el espía arrepentido* (2nd season) and in *Diciembre 2001* (Star+). In these fictions based on real events, speculations about how the events would have happened prevail. To make this effect possible, fictions work with elements of verisimilization: references to other identifiable characters, clothing or furniture. These glances at the past focus especially on unresolved issues such as the attacks on Jewish institutions or the fall of the radical government headed by De la Rúa. It is a recent and traumatic past of which the narrative seeks to take charge by suturing the historical hiatus. They present an explanatory speculation. Although they may be of interest as pure fiction for an expectation that does not know Argentine history, the local reading cannot disregard the responsibilities that fiction assigns.

6.3. Narrative and Stylistic Resources

The five fictions present technical-aesthetic values of high production quality while building coherent narrative and stylistic universes. Each one, with its tone and form, plays the game of internationality. They are fictions produced to be sold globally. Their realistic, measured, careful style and great editing work seek to escape the local contingency. In all cases, the plots also present subplots that feed the main story, giving them dynamism, depth and interest. It can be interesting to see the link between Páez and Spinetta, for example, or to find in *Iosi's* references and encounters a familiar face, a person responsible for those whose responsibility is still being

debated in court. The series and miniseries not anchored in real events also allow reading allegories of the present: a neoliberal president who leads the country to a crisis could be read non-fictionally; a rich man who is saved by friends and a sensitive soul as well. Finally, the case of the building caretaker embodied by Francella in this second season appears more hyperbolic in his features than in the first season, avoiding the criticism and anger that the first appearance aroused on the part of the building workers' guild and its workers. This new adventure series is better placed in the plane of comic fiction and accentuates the character of the laughable, so that the link with the comparative reading is left out of the comments and experiences of the viewers.

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BRAZIL: “DEEP BRAZIL” IN TV FICTION¹

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Authors

Maria Immacolata Vassallo de Lopes (<https://orcid.org/0000-0003-3477-1068>)

Cláudia Peixoto de Moura (<https://orcid.org/0000-0002-1047-255X>)

Team

Marcel Antonio Verrumo (<https://orcid.org/0000-0002-2488-3616>)

Renata Pinheiro Loyola (<https://orcid.org/0000-0003-1902-9738>)

Bruno Iury Fracchia (<https://orcid.org/0000-0002-2053-1787>)

João Alfredo Alineri Ramos (<https://orcid.org/0000-0002-7997-4929>)

Talitta Oliveira Cancio dos Santos (<https://orcid.org/0000-0003-2136-7816>)

Catarina Lopes (<https://orcid.org/0000-0001-9781-004X>)

Felipe Gabriel da Silva (<https://orcid.org/0009-0002-2396-979X>)

Renan dos Santos Dias (<https://orcid.org/0009-0007-8259-0794>)

Hellen Cristina de Almeida Barreto (<https://orcid.org/0009-0009-5348-3142>)

Introduction

In what ways is the imaginary idea of who we are constructed in fictional stories? What are the origins of fictional stories that reach and impact considerable audiences? In an attempt to respond to the “2023 Theme of the Year”, “What is happening to the narratives in Ibero-American television fiction?”, we will use the metaphor “Deep Brazil”, a powerful key interpretation of Brazil presented throughout the year in different formats (telenovelas and TV series), in new productions, remakes, and reruns. Even in the era of streaming, Brazilian television fiction, especially the telenovela, has been confirmed as “narrative of the nation” (Lopes, 2003) and “communicative resource” (Lopes, 2009) in the current era of streaming, as a space for debate on topics linked on identity and conflicting interpretations of Brazil as social formation. Television images are not merely in the present, rather they represent a set of complex temporal relations, suggesting that we should think of Brazil as an intersection of different times, spaces, images, and voices.

In the narratives of travelers and settlers, in chronicles, journals, and stories of different kinds, the categories of *hinterland* and *coast* were forged and coexisted as opposites as much as complementary: opposites because one expressed the reverse of the other and complementary because, as in a mirror game, one was built in function of the other. These are dominant categories in the Brazilian social thought, in analyses that shift between the conventional and the unfamiliar within the same

¹ Obitel Brasil team thanks Kantar Ibope Media for kindly providing the information that made it possible to present this study.

country, echoing the uncomfortable and persistent belief that “Brazil does not recognize Brazil”. Molded as the basic categories to represent the nation, they are mentioned in books, cinema, or television, highlighting the contrasts between the rural and urban landscapes. However, we wish to appropriate the metaphor of “Deep Brazil” as a more actual concept that corroborates the hybridization of the *hinterland* and the *coast* instead of their opposition or complementarity.

Working in the cocoa plantation or dealing with cattle, laboring in industries, and performing elementary jobs of the “common man”, the characters’ journeys synthesize the reality of a large number of Brazilians living in unstable work relations in the countryside or the city, migrating from one place to another looking for work. Their lives portray a country that does not respect rigid limits between scenarios and ways of life, which feed back into each other and produces this unique social formation. Therefore, “Deep Brazil” is an analogy of a parallel Brazil where a large part of the population lives, whether in the *hinterland* or the *coast*. Throughout our history, peoples and cultures have been silenced by the dominating capitalism, colonialism, indigenous holocaust, slavery, and corruption. It is not difficult to see that within the “Hybridized Deep Brazil” there is room for stories of telenovelas like *Saramandaia* (1976), *O Rei do Gado* (1996) and *Pantanal* (2002), as well as those of *Vale Tudo* (1988), *Avenida Brasil* (2012), and *Vai na Fé* (2023)². All narratives of the imagined nation where strong similarities and differences, inequalities and oppressions are present.

Finally, we explain the choice of the concept “Deep Brazil” as the title of this chapter. Its origin comes from classic Brazilian literature, precisely from *Os Sertões* (1902) by major writer Euclides da Cunha. We believe this term, as a metaphor, expresses the diverse “brazils” existing in this vast national territory. It will be found along this chapter, especially in “Theme of the Year”.

1. The audiovisual context of Brazil in 2023

1.1. Broadcast television in Brazil

The Brazilian television system has seven television networks with national coverage, five private and two public.

² Note: In this work, Brazilian telenovela titles without indication of the production company are all from TV Globo.

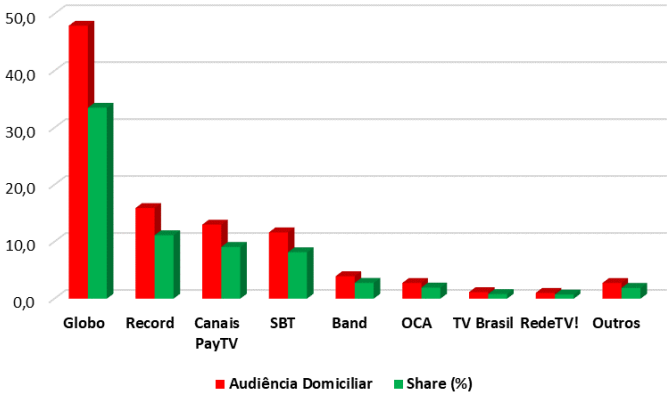
Table 1. National broadcast TV stations in Brazil in 2023

Private Broadcasters (5)	Public Broadcasters (2)
TV Globo	TV Brasil
TV Record	
SBT	TV Cultura
TV Band	
Rede TV!	
Total Broadcasters = 7	

Source: Obitel Brasil

Graph 1. TV audience and share by broadcaster in 2023

Broadcaster	Home Rating	Rating (%)	Share (%)
Globo	11.3	47,5	33,5
Record	3.8	16,0	11,1
PayTV Channels	3.1	13,0	9,1
SBT	2.8	11,8	8,1
Band	0.9	3,8	2,8
OCA ³	0.7	2,9	1,9
TV Brasil	0.3	1,3	0,8
RedeTV!	0.2	0,8	0,7
Others	0.7	2,9	1,9
TOTAL	23.8	100,0	69,9



Source: Kantar IBOPE Media and Obitel Brasil

Broadcast TV faced a drop in audience throughout 2023, going from 21.6% in 2022 to 20.7% (discounted 3.1% of Pay TV Channels). Only Record, TV Brasil and OCA were not affected by this loss of viewers.

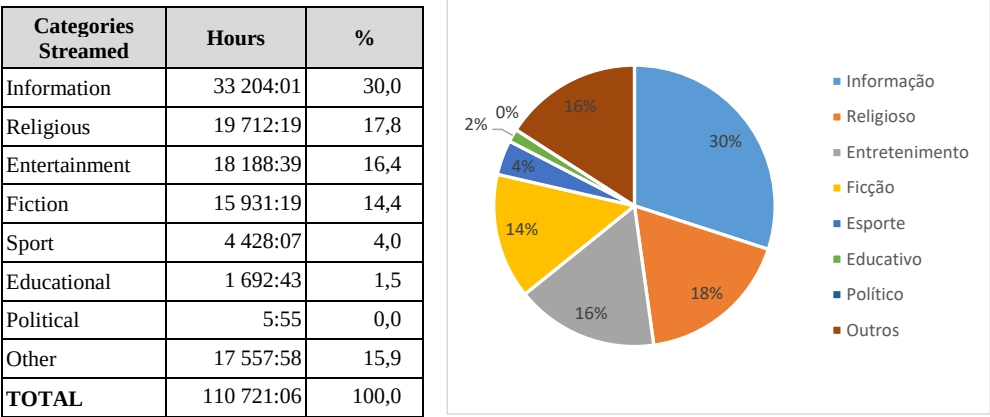
TV Globo remained the leader viewers despite a decrease in the share of 0.5% and ratings going from 11.7% to 11.3%. Even so, the broadcaster remained far ahead of the second-placed Record, which kept its 3.8% rating and share stable. There were also no changes in the third-placed SBT which remained in this position, even though its rating went from 3.1% to 2.8%.

Pay TV also lost viewers. In 2022, paid channels had a rating of 3.5% and a share of 10.2%. In 2023, they fell to 3.1% and 9.1%, respectively. As for the media penetration ratings³, the Internet remains in the lead despite its slight drop from 90.8%

³ OCA: Other Open Channels (Outros Canais Abertos in portuguese): open broadcasters that do not have reported viewership.

to 90.1%. The growth trend present in the film industry stands out, whose penetration increased from 13.9% to 14.8%, achieving a solid post-pandemic recovery. To reach these numbers, the film industry released new blockbusters and sequels of selected franchises, such as “Avatar: The Way of Water”, or new versions of transmedia works, such as “Barbie”, the highest grossing film in Brazil in 2023, and “Super Mario Bros: the Movie”. Radio and print media (newspapers and magazines) increased significantly, from 43.9% to 46.7, proving that traditional media is regaining audiences.⁴

Graph 2. Genres and hours broadcast on TV programming in 2023⁵



The Graph 2 remains the same as in 2022. In the first place, the genre ‘information’ increased from 32,000 to 33,000 hours but dropped from 30.9% to 30% in share. The numbers of the ‘religious’ genre have increased by 2,000 hours, demonstrating the appeal of evangelical content on open TV. ‘Entertainment’ and ‘fiction’ increased substantially by 28.6% and 78%, respectively, compared to 2022. Fiction, which accumulated 8,000 hours, reached more than 15,000, thanks to the resurgence of the sector in broadcasting TV post-pandemic. Finally, ‘Political’ genre suffered the greatest retraction, from 389 to 5 hours, due to the end of the election year (2022).

⁴ Media penetration index comparing 2023 with 2022: Internet, 90.1%, from 90.8% in the previous year (decrease); Outdoor Media, 79.9%, from 80.3% (down); Open TV, 70.1%, from 72.1% (fall); Radio, 46.7%, from 43.9% (increase); Pay TV, 24%, 26.1% (down); Magazines, 6.9%, 6.5% (increase); Newspapers, 7.19%, from 6.29% (increase); Cinema, 13.9%, from 11.3% (increase). Source: Kantar Ibope Media: Target Group Index.

⁵ Genres: Fiction: film, miniseries, telenovela, series; Entertainment: auditorium, cars and engines, culinary, game show, humorous, children’s, musical, awards, reality show, show; Information: debate, documentary, interview, journalism, report; Sport: sport, football; Religious; Educational; Political; and Others: others that are not listed, rural, health, raffle, telesales, travel and tourism. This final categorization was made by Obitel Brasil, based on categories from Kantar Ibope Media.

1.2. PayTV and VoD platforms in Brazil

Table 2a. PayTV channels in Brazil

10 most watched PayTV channels in Brazil			
Channel	Genre	Origin	Rating (home audience)
Viva	Fiction	Brazil	0.08
SporTV	Sport	Brazil	0.07
AXN	Fiction	Singapore	0.05
GloboNews	Information	Brazil	0.05
Premiere Clubes	Sport	Brazil	0.05
Universal TV	Fiction	United States	0.05
ESPN	Sport	United States	0.05
Discovery Channel	Entertainment	United States	0.04
Cartoon Network	Kids	United States	0.03
Megapix	Fiction	Brazil	0.03

Source: Kantar Ibope Media and Obitel Brasil

Among the leading channels on PayTV, Viva, owned by Globo Group, is at the top. Despite its position, the channel numbers have dropped compared to the previous year, where it had a rating of 0.19, close to first placed SporTV, with 0.21. In second place, SporTV is at 0.07, a retraction justified by the end of the coverage of major sporting events, such as the “2022 World Cup” and “Copa Libertadores da América”. Among the top ten, Megapix, owned by Globo Group, intended for the exhibition of films, holds the last position.

Table 2b. VoD platforms in Brazil

10 most important VoD platforms in Brazil
1. Netflix
2. Prime Video (Amazon)
3. Looke ⁶
4. DirecTV Go
5. HBO Max (Warner Bros. Discovery)
6. Globoplay (Globo)
7. DaFilms
8. FlixOlé
9. Simply South
10. Discovery+ (Warner Bros. Discovery)

Source: Ancine (National Film Agency 2023)

Ancine (National Film Agency) has made its 2023, report available⁷ and it identifies the largest streaming platforms operating in Brazil via subscription. Looke and Globoplay are the only Brazilian ones. The first holds 5.2 thousand audiovisual works, with 12.6% being national content, and the second offers 2.5 thousand works, 34.9% of those are Brazilian productions - the largest national catalog⁸. Considering the ten platforms researched, only 8% of the content is Brazilian, 69% of which are independent productions.

1.3. Funding sources for the audiovisual sector

The year 2023 marks the return of public investments in the Brazilian audiovisual sector focused on recovering creative and productive capacity. The investment reached around 470 million dollars due to public calls from the Audiovisual Sector Fund (FSA, Fundo Setorial do Audiovisual in portuguese) and other Incentive Laws.

Ancine held the second edition of the TV/VoD Public Call with an investment of approximately 18 million dollars. To encourage the production of audiovisual content on both open and paid networks, the call allocated resources to productions in the North, Northeast, and Midwest regions through a public policy aiming to favor the “Deep Brazil”.

⁶ Although considered platforms, according to Ancine’s criteria, Looke, DirecTVGo, DaFilms, and FlixOlé are digital media repositories.

⁷ <https://bitly.cx/IA0>

⁸ List of the five largest SVOD categories in national content (except Claro TV+), according to Ancine’s list: Globoplay (34.9%), Looke (12.6%), DirecTV Go (11.0%), Prime Video (4.4%), Netflix (3.8%) and HBO Max (2.7%).

The Paulo Gustavo Law (LPG, Lei Paulo Gustavo in portuguese) became one of the most relevant public resources for funding audiovisual projects. Although it was created on an emergency basis in 2022 by the Brazilian Congress after the COVID-19 pandemic, the law was regulated under the Lula government, and its first proposals were published in 2023.

In 2023, the advertising industry invested 10.4% more compared to 2022, going from 424 million dollars to around 468 million. On the other hand, there was a drop in advertising investments⁹ for open and closed television. The budget for Broadcast TV dropped from 41.7% in 2022 to 39.6% in 2023. The percentage allocated to PayTV was 6.3% in 2022 compared to 5% in 2023.

1.4. Communication policies

After a cycle of setbacks in the communication industry during the Bolsonaro Government (2019-2022), 2023 saw a rebuilding in several sectors. In culture, the return of the Ministry of Culture was crucial to resuming audiovisual productions in the country considering the following achievements: normalization of federal public funding by Ancine; the Paulo Gustavo Law; the Aldir Blanc Law; mandatory quota for Brazilian productions (films and series) on PayTV, ensuring the stability of the audiovisual sector; and finally the new format of the Superior Council of Cinema, with unprecedented attention to gender equality, regional and ethnic-racial diversity.

There are still challenges, such as the regulation of VoD, the definition of copyright for creators and producers, improvements in infrastructure, and the distribution of national productions that impact the internationalization of the Brazilian audiovisual industry.

In the public sector, the year was marked by actions such as the expansion of the National Communications Network with the inclusion of universities and federal institutes; the pilot project of the Brazil Digital Program; the resumption of TV Brasil Internacional; and the creation of the Working Group to discuss social participation and propose measures to improve public communications (EBC, 2024)¹⁰.

1.5. Digital and mobile infrastructure

Internet access in Brazilian homes grew again in 2023 thanks to more serviceable connectivity in houses in classes C, D, E. In Brazil, 84% of houses are connected to the internet, an increase of 4% compared to 2022, remaining stable since 2020¹¹.

The number of people without internet connection fell from 36 million (2022) to 29 million (2023). As multiple activities and services are available online, not having access to the internet can cut off citizens from opportunities.

⁹<https://janela.com.br/2024/03/20/publicidade-no-brasil-cresce-10-4-em-2023-acima-ate-da-retomada-de-2022/>

¹⁰ EBC (Empresa Brasil de Comunicação), manager of TV Brasil, is a federal public company and has a public media conglomerate in the country: Rádio Nacional, Rádio MEC, TV Brasil, Agência Brasil, Radioagência Nacional. <https://www.ebc.com.br/>

¹¹ Cetic.br|NIC.br, <https://cetic.br/pt/>

In Brazil, the mobile phone is the most used tool to access the internet (99%), followed by the television (58%), with its access via cable or fiber optics on the rise for a decade, and computers (42%). Although connectivity has increased, the quality of access is still unequal.

There was a growth in listeners of *podcasts*, the favorite media of almost 30% of the population, and videos, which increased to 45%. As for video sharing, we have music (50%), news (48%), and religious events or other programs (34%).

Online services and purchases were very popular in 2023: 73% of the population used free government services, and 50% made online purchases. Optical fiber continues to be the most used connection technology, but data security is still a concern.

In 2022, the 5G technology was implemented in Brazil, being considered the fastest in Latin America. However, it serves only 10% of the population. The promise is that by 2029 there will be full coverage countrywide. In this way, 4G continues to dominate the mobile phone market.

2. Analysis of the year: the national and Iberoamerican fiction premiere in 2023

The data presents us with the possibility of quantifying and understanding the predominant elements broadcasted on screen and identifying the topics with the highest audience. The ten most-watched productions in 2023 show what people have been watching and the representations in television fiction, including those of the “Deep Brazil”.

Table 1. Premiere fictions aired in 2023
(national and foreign within the Obitel scope)

PREMIERE NATIONAL TITLES – 39	PREMIERE FOREIGN TITLES – 8
TV Globo (32 titles)	SBT (4 titles)
1. <i>Amor Perfeito</i> (telenovela)	1. <i>Minha Fortuna é te Amar</i> (telenovela, Mexico)
2. <i>Aruanas</i> (series) - season 2	2. <i>Três Vezes Ana</i> (telenovela, Mexico)
3. <i>Cara e Coragem</i> (telenovela)	3. <i>Um Refúgio para o Amor</i> (telenovela, Mexico)
4. <i>Cine Holliúdy</i> (series) – season 3	4. <i>Vencer o Desamor</i> (telenovela, Mexico)
5. <i>Cinema do Líder: As Five</i> (series) – season 2	Band (1 title)
	5. <i>Valor da Vida</i> (telenovela, Portugal)
6. <i>Elas Por Elas</i> (telenovela)	TV Brasil (1 title)
7. <i>Encantado’s</i> (series)	6. <i>Maria Madalena</i> (telenovela, Mexico)
8. <i>Família Paraíso</i> (series) – season 2	TV Cultura (2 titles)
9. <i>Fuzuê</i> (telenovela)	7. <i>Da Mood</i> (series, Portugal)
10. <i>Histórias Impossíveis - Falas da Terra: Pintadas</i> (unit)	8. <i>Merlí</i> (series, España)
11. <i>Histórias Impossíveis - Falas da Vida: Acesso</i> (unit)	
12. <i>Histórias Impossíveis - Falas de Orgulho: Sísmicas</i> (unit)	
13. <i>Histórias Impossíveis - Falas Femininas: Mancha</i> (unit)	
14. <i>Histórias Impossíveis - Falas Negras: Levante</i> (unit)	
15. <i>Histórias Quase Verdadeiras</i> (miniseries)	
16. <i>Mar do Sertão</i> (telenovela)	
17. <i>Marighella</i> (miniseries)	
18. <i>No Ritmo de Natal</i> (telemovie)	
19. <i>Onde Está Meu Coração</i> (series)	
20. <i>Pluft, o Fantasminha</i> (series)	
21. <i>Rensga Hits!</i> (series)	
22. <i>Segunda Chamada</i> (series) – season 2	
23. <i>As Aventuras de José e Durval</i> (series)	
24. <i>Baião de Dois</i> (telemovie)	
25. <i>Beleza da Noite</i> (telemovie)	
26. <i>Fim</i> (series)	
27. <i>Fuga de Natal</i> (telemovie)	
28. <i>Guerra da Tapioca</i> (telemovie)	
29. <i>Terra e Paixão</i> (telenovela)	
30. <i>Todas as Flores</i> (telenovela)	
31. <i>Travessia</i> (telenovela)	
32. <i>Vai na Fé</i> (telenovela)	
Record (1 title)	
33. <i>Reis</i> (telenovela)	
SBT (2 titles)	
34. <i>A Infância de Romeu e Julieta</i> (telenovela)	
35. <i>Poliana Moça</i> (telenovela)	
TV Brasil (2 titles)	
36. <i>DPA: Detetives do Prédio Azul</i> (series)	
37. <i>Seis da Ilha</i> (series)	
TV Cultura (2 titles)	
38. <i>3 Teresas</i> (series)	
39. <i>Morgana & Celeste</i> (series)	
	TOTAL OF PREMIERE TITLES: 47

Source: Obitel

Table 1a. Reruns aired in 2023 (national and foreign within the Obitel scope)

NATIONAL RERUN TITLES - 20	FOREIGN RERUN TITLES – 6
TV Globo (7 titles)	SBT (6 titles)
1. <i>Chocolate com Pimenta</i> (telenovela)	1. <i>A Dona</i> (telenovela, Mexico)
2. <i>Mulheres Apaixonadas</i> (telenovela)	2. <i>A Gata</i> (telenovela, Mexico)
3. <i>Mulheres de Areia</i> (telenovela)	3. <i>Abismo de Paixão</i> (telenovela, Mexico)
4. <i>O Rei do Gado</i> (telenovela)	4. <i>Meu Pecado</i> (telenovela, Mexico)
5. <i>Paraíso Tropical</i> (telenovela)	5. <i>Rebelde</i> (telenovela, Mexico)
6. <i>A Presepada</i> (telemovie)	6. <i>Sortilégio</i> (telenovela, Mexico)
7. <i>Amor ao Quadrado</i> (telemovie)	
Record (5 titles)	
8. <i>A Lei e o Crime</i> (series)	
9. <i>A Terra Prometida</i> (telenovela)	
10. <i>Jesus</i> (telenovela)	
11. <i>Jezabel</i> (telenovela)	
12. <i>Vidas em Jogo</i> (telenovela)	
SBT (6 titles)	
13. <i>Chiquititas</i> (telenovela)	
14. <i>Cristal</i> (telnovela)	
15. <i>Cúmplices de um Resgate</i> (telenovela)	
16. <i>Marisol</i> (telenovela)	
17. <i>Pequena Travessa</i> (telenovela)	
18. <i>Pícara Sonhadora</i> (telenovela)	
TV Brasil (2 titles)	
19. <i>Bugados</i> (series)	
20. <i>O Pantanal e Outros Bichos</i> (series)	
	TOTAL OF RERUN TITLES: 26

Source: Obitel Brasil

In 2023, the number of premieres in Brazil increased significantly. Forty-seven new titles were released, marking an increase of 74% compared to the previous year, with only 19 new productions. In total numbers, 73 productions were broadcasted in 2023, an increase of 40.3% compared to the 52 productions broadcasted in 2022.

On the one hand, the number of national telenovelas increased by only one production, while Brazilian series more than doubled, going from 7 to 15 new productions, one of the great highlights of the year, as we will see below.

TV Globo continues to be responsible for most national premieres, behind 32 of the 39 new productions, an increase of 146% compared to the 13 works aired by the company in 2022. One telenovela, “*Todas as Flores*”, was added to the grid at 10 pm, an example of Globo’s distribution strategy by which a production created directly for Globoplay streaming is aired on broadcast TV as premiere.

As for the other broadcasters, only public television recorded an increase in series: TV Cultura premiered just one production in 2022 (the miniseries *Independências*) but four in 2023, all new productions, two national: *DPA:Detetives do Prédio Azul* e *Seis da Ilha* and two foreign: *Mood* and *Merlí*, while TV Brasil went from four to five productions (four Brazilian and one foreign). On the other hand, SBT, Record, and Band suffered a reduction in the total number of fiction broadcasted. On the other side TV Globo decreased the number of reruns, from seven to six fiction.

The next three tables show how **production capacity** of the Brazilian television fiction had a remarkable growth in 2023.

Below, table 2 shows the evolution of the national premiere production over the last five years by number of productions and hours watched.

**Table 2. Formats of national fiction premiere in 2023
and their evolution in a five-year period**

Format	Titles						Hours					
	2019	2020	2021	2022	2023	Total	2019	2020	2021	2022	2023	Total
Telenovela	15	6	7	11	12	51	1075:00	339:35	366:40	1187:25	1231:10	4199:50
Series	18	9	9	7	15	58	85:00	34:10	50:45	97:30	231:35	499:00
Miniseries	5	1	1	1	2	10	20:25	7:45	1:05	12:00	5:00	46:15
Sitcom	0	0	0	0	0	0	0:45	1:40	0:00	0:00	0:00	2:25
Unitary	0	0	0	0	5	5	0:00	0:00	0:00	0:00	3:40	3:40
Docudrama	6	5	0	0	0	11	0:00	0:00	0:00	0:00	0:00	0:00
Other	6	5	0	0	5	16	118:15	32:55	0:00	0:00	4:35	155:45
Total	50	26	17	19	39	151	1.299:25	416:05	418:30	1.296:55	1.476:00	4.906:55

Source: Kantar Ibope Media and Obitel Brasil

The data show the increased number of new productions by more than 100% compared to 2022, coming close to the average Brazilian production flow of 45.3 productions/year, recorded five years before the COVID-19 pandemic. In terms of average hours watched, it exceeded the pre-pandemic average (1,346 hours/year) with 1,476 hours in 2023.

Although telenovela is the main fictional narrative, impacting millions of viewers daily, in 2023 there was a rise in series, surpassing the number of new telenovelas aired. In addition, other formats, such as miniseries, units, and documentary dramas also registered a rise. In “others” we have five television movies. These productions highlight current topics about Brazil and the world, fictionalized in a creative and educational way. Telenovelas are a picture of society and address relevant themes that create identification and dialogue with the public, staying in tune with present times. In other words, Brazilians need to see themselves in telenovelas for the genre to survive (Svartman, 2023).

Table 3. Premiere fiction aired in 2023: countries of origin

Country	Titles	%	Hours	%
NATIONAL (total)	39	83	1476:00	75
OBITEL COUNTRIES (total)	8	17	486:40	25
Argentina	0	0	0:00	0
Brazil	39	83	1476:00	75
Chile	0	0	0:00	0
Colombia	0	0	0:00	0
Ecuador	0	0	0:00	0
Spain	1	2	11:25	1
USA (Hispanic production)	0	0	0:00	0
Mexico	5	11	324:55	17
Peru	0	0	0:00	0
Portugal	2	4	150:20	8
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
Co-productions Obitel Countries	0	0	0:00	0
TOTAL	47	100,0	1962:40	100,0

Source: Kantar Ibope Media and Obitel Brasil

Table 4. National and Ibero-American fiction formats aired in 2023

Format	Titles				Hours			
	National	%	Ibero-American	%	National	%	Ibero-American	%
Telenovela	12	30,8	6	75,0	1231:10	83,4	468:30	96,3
Series	15	38,5	2	25,0	231:35	15,7	18:10	3,7
Miniseries	2	5,1	0	0,0	5:00	0,3	0:00	0,0
Sitcom	0	0,0	0	0,0	0:00	0,0	0:00	0,0
Unitary	5	12,8	0	0,0	3:40	0,2	0:00	0,0
Docudrama	0	0,0	0	0,0	0:00	0,0	0:00	0,0
Other (TV movies)	5	12,8	0	0,0	4:35	0,3	0:00	0,0
Total	39	100,0	8	100,0	1476:00	100,0	486:40	100,0

Source: Kantar Ibope Media and Obitel Brasil

The number of premiere released Ibero-American products remained at eight productions, with the same number of Mexican and Portuguese ones. Despite this, we had a 55.2% increase in the number of hours of fiction from other countries, from 313 hours in 2022 to 486 in 2023.

The Ibero-American productions were mostly presented in telenovela format, corresponding to 75% of the total exhibited in Brazil. However, the number of telenovelas decreased from 7 to 6, while the number of series increased from 1 to 2.

The national productions had diverse formats. However, the variety of foreign ones remained small with only two formats registered.

The dominance of TV Globo, especially its prime time, was again in the list of the ten most-watched productions. The telenovela *O Rei do Gado* is the only production that was not aired in prime time and the only rerun out of the ten most watched fictions. Unlike 2022, one rerun featured in the top 10 list, one that we may consider an example of an “Deep Brazil” narrative.

Table 5. Top 10 most watched titles in 2023

Titles		Channel	Country of production	Format/Genre	Chapter in 2023	Time Slot	Rating	Share
1	<i>Terra e Paixão</i>	TV Globo	Brazil	Telenovela/Drama	204	Prime time	26,1	43,6
2	<i>Travessia</i>	TV Globo	Brazil	Telenovela/Drama	107	Prime time	24,9	41,6
3	<i>Vai na Fé</i>	TV Globo	Brazil	Telenovela/Drama	179	Prime time	23,8	39,6
4	<i>Cara e Coragem</i>	TV Globo	Brazil	Telenovela/Comedy/Adventure	11	Prime time	21,1	36,3
5	<i>Amor Perfeito</i>	TV Globo	Brazil	Telenovela/Drama	161	Prime time	20,9	37,6
6	<i>Mar do Sertão</i>	TV Globo	Brazil	Telenovela/Romantic Comedy	65	Prime time	20,7	38,5
7	<i>Fuzuê</i>	TV Globo	Brazil	Telenovela/Romantic Comedy	120	Prime time	20,1	35,1
8	<i>O Rei do Gado</i>	TV Globo	Brazil	Telenovela/Drama	109	Afternoon	19,1	38,8
9	<i>Rensga Hits!</i>	TV Globo	Brazil	Series/Musical/Drama	8	Prime time	18,4	35,2
10	<i>Histórias Quase Verdadeiras</i>	TV Globo	Brazil	Miniseries/Comedy	4	Prime time	17,5	33,3
Total national productions: 10				Foreign Original Screenplays: 0				
100%				0%				

Source: Kantar Ibope Media and Obitel Brasil

Like in 2022, the top ten does not consist only of telenovelas. The last two places on the list are Brazilian series, *Rensga Hits!* and *Histórias Quase Verdadeiras*. However, the eight telenovelas in the top positions prove the country’s preference for the format. Despite that, there was a drop in audience ratings. *Pantanal* (2022), first place on last year’s list, registered 28.9 points against 26.1 points of *Terra e Paixão* (2023). The other positions follow similar numbers to those of 2022. As for genres, the data distribution of the previous year is maintained, with 60% drama productions and 40% comedy.

Out of 10 productions, six present the “Deep Brazil” showing, namely: *Terra e Paixão*; *Travessia*; *Vai na Fé*; *Mar do Sertão*; *O Rei do Gado*; e *Rensga Hits!*. All set in the hinterlands or in the peripheries of large cities.

The appreciation for Brazilian identity or “Brazilianness” has proven to be a recent trend, driven by the success of the remake of *Pantanal* in 2022. This diversity of scapes is essential to understanding the changes in everyday life and the experiences portrayed on television. As Néia (2023) highlights, “television fiction forged notions of Brazilian identity that incorporated melodramatic ethics and aesthetics and are embodied with a whole repertoire rooted in the culture of the country and its popular imagination” (p. 77).

**Table 6. Audience profile of the ten most watched titles:
gender, socioeconomic level and age group**

Titles		Channel	Gender %		Socioeconomic level %		
			Women	Men	AB	C	FROM
1	<i>Terra e Paixão</i>	TV Globo	62,4	37,6	30,3	49,3	20,5
2	<i>Travessia</i>	TV Globo	63,7	36,4	31,4	48,4	20,1
3	<i>Vai na Fé</i>	TV Globo	64,6	35,4	28,6	49,0	22,3
4	<i>Cara e Coragem</i>	TV Globo	63,7	36,3	28,1	48,2	23,7
5	<i>Amor Perfeito</i>	TV Globo	65,8	34,2	28,7	49,6	21,7
6	<i>Mar do Sertão</i>	TV Globo	63,9	36,1	28,3	48,3	23,3
7	<i>Fuzuê</i>	TV Globo	64,3	35,7	27,6	50,1	22,2
8	<i>O Rei do Gado</i>	TV Globo	63,8	36,2	26,6	49,2	24,3
9	<i>Rensga Hits!</i>	TV Globo	63,1	36,9	30,6	48,9	20,6
10	<i>Histórias Quase Verdadeiras</i>	TV Globo	63,2	36,8	31,9	47,8	20,2

Titles		Age group %					
		4 to 11	12 to 17	18 to 24	25 to 34	35 to 49	50+
1	<i>Terra e Paixão</i>	4,4	3,2	5,2	11,2	23,0	53,0
2	<i>Travessia</i>	4,5	3,4	5,3	11,4	24,0	51,4
3	<i>Vai na Fé</i>	4,9	3,8	5,2	12,0	23,8	50,3
4	<i>Cara e Coragem</i>	4,7	3,5	4,9	11,2	24,1	51,7
5	<i>Amor Perfeito</i>	4,3	3,2	4,7	11,1	22,3	54,6
6	<i>Mar do Sertão</i>	4,4	3,1	4,9	10,5	23,4	53,9
7	<i>Fuzuê</i>	4,7	3,4	5,1	11,4	22,6	52,9
8	<i>O Rei do Gado</i>	4,4	3,1	5,0	10,7	23,4	53,3
9	<i>Rensga Hits!</i>	4,6	3,4	5,6	12,8	23,9	49,6
10	<i>Histórias Quase Verdadeiras</i>	4,5	3,6	5,9	12,2	25,8	48,0

Source: Kantar Ibope Media and Obitel Brasil

The two tables above repeat what we may call the standard television audience in Brazil: 60% are women and 40% are men. Women are still the highest audience of 6 and 7 pm telenovelas and among men, the 9 pm telenovela remains the most watched.

The C class remains the main audience of the ten most watched fictions, with consistent numbers in all time slots, with *Fuzuê* and *Mar do Sertão* standing out as the most popular. The audiences of A and B classes dropped compared to previous years, reinforcing the possible migration to streaming platforms or other leisure activities out of home. On the other hand, classes D and E are responsible for a general increase in viewership, with *Cara e Coragem* and *Mar do Sertão*, both at 7 pm, the most watched, indicating the people preference for romance and comedy.

Considering age groups, people over 50 were the main audience of fictional productions, with special emphasis on telenovelas aired at 6 pm. We noticed a change in the age group from 35 to 49 years old which, in 2022, preferred the miniseries *Histórias Quase Verdadeiras*, and in 2023, two telenovelas, *Cara e Coragem* and *Travessia*.

Open television is still the main force of entertainment thanks to the significant increase in the production of national fiction that obtained expressive audience results, even with the growth of streaming services in the country.

3. VoD Monitoring 2023

Brazilian streaming platforms have been established as spaces of availability and consumption of national content, presenting different ‘Brazils’, mirroring its depth with diverse stories and characters typical of the country.

3.1. VoD Platform Market in 2023

VoD platforms continue in the main formats of audiovisual content in the country. According to “Inside Video 2024”¹², the time dedicated to online video platforms was about 2h23 per day. About 44% of the public uses the free trial of each provider before switching players to use a new free trial. The ban on account sharing initiated by Netflix in May 2023 was noticed by the market

3.2. Offer of local VoD platforms in 2023 (national, regional into the country)

Brazil counted 62 VoD platforms in 2023, according to the “Panorama of the Video on Demand Market in Brazil 2023”¹³. On the 24 main ones, only 15.3% of the productions are national, just 9% have the Brazilian Product Certificate (CPB), and another 6.3% are independent production companies constituents of qualified space.

Among Brazilian platforms with greatest national content we have Box Brasil Play that leads this ranking with 41.3%, followed by Globoplay (35.2%) and Libreflix (31.9%). The platforms with the lowest offer of Brazilian content are Disney+ (1.3%), HBO Max (2.7%) and Star+ (3%).

The national VoD platforms are: Arte1 Play, Belas Artes À La Carte, Box Brasil Play, Canais Globo, Cinemateca Pernambucana, Claro TV+, Claro Video, Globoplay,

¹² *Inside Video 2024* is a study by Kantar Ibope Media with data from 2023. Available at: <https://bit.ly/3R2ibWk>

¹³ Research by Ancine and the Brazilian Observatory of Cinema and Audiovisual (OCA): <https://bit.ly/3UOdakX>

Libreflix, Looke, NetMovies, Oi Play, Oldflix, SBT Videos, Telecine, UOL Play and Vivo Play. Most operate through a fixed monthly fee for access to the production library (Subscription VOD - SVOD); another relevant model only charges registration (Free VOD - FVOD).

3.3. VoD analysis in 2023: national premiere fiction and co-production

The national VoD premieres in 2023 in Brazil were:

Table 7. Premiere national and production fiction
screened in 2023 in Brazil on VoD

Premiere National Titles	Co-productions
Globoplay - 28 titles 1. <i>A Vida Pela Frente</i> (series) 2. <i>Acampamento de Magia Para Jovens Bruxos</i> (series) 3. <i>As Aventuras de José & Durval</i> (series) 4. <i>As Five</i> (series) 5. <i>Betinho – No Fio da Navalha</i> (series) 6. <i>Fim</i> (series) 7. <i>Os Outros</i> (series) 8. <i>Rio Connection</i> (miniseries) 9. <i>Todas as Flores</i> (telenovela) 10. <i>Vicky e a Musa</i> (series) 11. <i>Amor Perfeito</i> (telenovela) 12. <i>Cara e Coragem</i> (telenovela) 13. <i>Cine Holliúdy</i> (series) – season 3 14. <i>Elas Por Elas</i> (telenovela) 15. <i>Família Paraíso</i> (series) – season 2 16. <i>Fuzuê</i> (telenovela) 17. <i>Histórias Impossíveis - Falas da Terra: Pintadas</i> (unitary) 18. <i>Histórias Impossíveis - Falas da Vida: Acesso</i> (unitary) 19. <i>Histórias Impossíveis - Falas de Orgulho: Sísmicas</i> (unitary) 20. <i>Histórias Impossíveis - Falas Femininas: Mancha</i> (unitary) 21. <i>Histórias Impossíveis - Falas Negras: Levante</i> (unitary) 22. <i>Histórias Quase Verdadeiras</i> (miniseries) 23. <i>Mar do Sertão</i> (telenovela) 24. <i>No Ritmo de Natal</i> (TVmovie) 25. <i>Pluft, o Fantasma</i> (series) 26. <i>Terra e Paixão</i> (telenovela) 27. <i>Travessia</i> (telenovela) 28. <i>Vai na Fé</i> (telenovela) Netflix - 9 titles 1. <i>A Sogra que Te Pariu</i> (Sitcom) 2. <i>B.O.</i> (Sitcom) 3. <i>Cidade Invisível</i> (series) 4. <i>De Volta aos 15</i> (series) 5. <i>DNA do Crime</i> (series) 6. <i>Olhar Indiscreto</i> (miniseries) 7. <i>Sem Filtro</i> (series) 8. <i>Sintonia</i> (series) 9. <i>Todo Dia a Mesma Noite</i> (miniseries) STAR+ - 7 productions 1. <i>A História é Delas</i> (series) 2. <i>Compro Likes</i> (series)	Globoplay - 1 title 1. <i>Codex 632</i> (miniseries - Brazil and Portugal) SBT - 1 title 2. <i>A Infância de Romeu e Julieta</i> (telenovela) – Prime Video

3. <i>Dois Tempos</i> (series) 4. <i>Impuros</i> (series) 5. <i>O Rei da TV</i> (series) 6. <i>Santo Maldito</i> (series) 7. <i>Últimas Férias</i> (series) Prime - 4 titles 1. <i>Amar é Para os Fortes</i> (series) 2. <i>Cangaço Novo</i> (series) 3. <i>Novela</i> (series) 4. <i>O Negociador</i> (series) Disney+ - 4 titles 1. <i>A Magia de Aruna</i> (series) 2. <i>Mila no Multiverso</i> (series) 3. <i>Tá Tudo Certo</i> (miniseries) 4. <i>Tudo Igual...</i> SQN (series) HBO Max - 3 titles 1. <i>Além do Guarda-Roupa</i> (series) 2. <i>B.A: O Futuro Está Morto</i> (series) 3. <i>Use Sua Voz</i> (series)	
Total: 55	Total: 2

Source: Obitel Brasil

The year 2023 was characterized by the launch of 57 Brazilian fictional titles on VoD. Globoplay remained in the lead with 29 productions, 10 of which were produced strictly for this national streaming (in table 7, from number 1 to 10); 18 were premiered on TV Globo (open channel) and simultaneously on VoD (in table 7, from number 11 to 28). There are also fictions co-produced with Portugal. Among the productions made exclusively for Globoplay, two biopics series stood out: *As Aventuras de José & Durval*, about the life of the popular country duo Chitãozinho and Xororó, and *Betinho – No Fio da Navalha*, about Herbert José de Souza (called Betinho), leader of the national campaign against hunger and resistance to the military dictatorship (1964-1985).

The platforms with the highest number of premieres are Netflix (9), STAR+ (7), Prime (5), Disney+ (4), and HBO Max (3). These platforms also released comedy and teen series (22). Also noteworthy is the children’s telenovela *A Infância de Romeu e Julieta*, a co-production Prime and SBT, which is one of the country’s major television networks, known for broadcasting Mexican telenovelas, and for the production and adaptation of shows for younger audiences.

The miniseries *Codex 632* was the only released co-production, a Brazil/Portugal partnership directly produced for Globoplay. But the co-production index shows a retraction compared to 2022 (6), returning to 2021 data. Unlike the previous year, in 2023, foreign streaming platforms did not launch co-productions in the country.

In addition to the new fictions that premiered on VoD platforms, Globoplay, in 2023, also launched 52 “classic” TV Globo productions, continuing the project of building a “digital library” (Newcomb, 1999), with the premiere of productions that

were only in its collection, and started being exhibited via Globoplay. Stories that made people remember plots, characters, and spaces stored in their affective memory and that build meanings of time for the Brazilian nation.

3.4 Narrative characteristics of VoD in 2023

Narratives often point out the quality of national television. This could be seen on three Globoplay series *Fim*, *Os Outros*, and *Betinho – No Fio da Navalha*. The first is an adaptation of the homonymous book by actress and writer Fernanda Torres that portrays a group of friends' journeys and shows the changes in Rio de Janeiro through the sixties. On the other hand, *Os Outros* presents conflicts between neighbors in a condo, signaling the tensions of a polarized society. The last one tells, as cited earlier, the story of Herbert José de Souza. These productions showed a diversity of representations of the “Deep Brazil”, with complex characters built in distinct layers, scenarios with social and psychological settings; TV editing promoting suspense and emotion.

On Prime Video, the “Deep Brazil” can be seen in *Cangaço Novo*, a series intended to update the historical phenomenon of “cangaço”, a kind of “social *banditry*” (Hobsbawm, 1975) practiced by violent gangs in the Northeast countryside in the last decades of the 19th century and the first decades of the 20th. This topic will be resumed below, in topic 5.1.

4. Interactivity and participation of audiences

The year 2023 is one of active participation of social media users and other audiences in television content. Telenovelas remained the format that stirred the most emotions and continued to drive conversation, especially on social networks. Characters were shipped, songs went viral, and content was created and spread across different platforms. In addition, serial productions presented us with a variety of “Brazils” and its characters, promoting marathons on streaming platforms, and creating content in digital environments.

Social Interactivity

In 2023, TV series promoted engagement in digital spaces, advertising, and marketing actions. An example is the release strategy of the series *Cangaço Novo* (Prime Video), in which a famous television presenter recorded vignettes reporting crimes in the fictional city of Cratará, where the story takes place - an action aimed at digital influencers. The campaign bolstered the series, awarded for technical quality, among local and international audiences. In African countries, such as Angola and Mozambique, the production was one of the most watched releases. In addition, it

bolstered discussions about TV 3.0, the television of the future that promises a new experience of watching TV and offers new and advanced interactive tools .

Social participation

In line with the narratives that portrayed the “Deep Brazil”, the telenovela *Terra e Paixão* narrated the story of a family after a life-changing murder in the fictional city of Nova Primavera. By showing a rural environment in the countryside, the telenovela introduced themes such as agrarian conflicts, social experiences in the contemporary countryside, violence, and affection. The homosexual relationship between foreman Ramiro and Kelvin, an attendant at a show house, won over the audience that shipped the characters – “Kelmiro” – and became a trending topic on social networks, showing great interactivity between viewers and fictional characters. Fans raised money online to ask for a spin-off of the couple’s story using a billboard built near Globo Studios. Kelmiro’s success changed the course of the production, which increased their screen time, promoted Ramiro’s redemption, and ended happily with a kiss between the two men.

As a telenovela that stood out for the participation of fans, *Vai na Fé*, our case study in the “Theme of the Year”, won over viewers who became commentators and producers of content on the plot. The audience got involved and cheered for different couples, such as Lumiar and Theo, Sol and Theo, and Sol and Lui. During the last episode, internet users confessed how much they would miss the characters and the opening song.

5. Highlights of the Year 2023

The year of 2023 was marked by productions of different Brazilian realities that, due to their narrative and technical quality, captivated critics and audiences. We highlight the series *Cangaço Novo* (Prime Video), *Os Outros*; *Betinho – No Fio da Navalha* (Globoplay), the telenovela *Terra e Paixão* (Globoplay) and discussions on the regulation of streaming and its impacts on the national audiovisual market.

5.1. The quality of national series in streaming

Some Brazilian series produced in 2023 for streaming stood out for the quality of their dramaturgy and production, reinforcing the “indigenization of fiction” (Buonanno, 2004) and presenting national traditions and ways of life through the “narrative of the nation” (Lopes, 2009).

Cangaço Novo, a series written by Mariana Bardan and Eduardo Melo, a co-production by Prime Video with the independent production company O2 Filmes, premiered in August 2023 and has eight episodes. The narrative and visual style is

inspired by the “northwestern”¹⁴ and, since its launch, has joined the top 10 most-watched series on the platform in 49 countries. The script tells the story of Ubaldo, a banker in São Paulo, who, after the death of his father, find out that he has an inheritance to receive in a town in the hinterlands of Ceará. With no memory of his childhood, he joins one of his sisters, who leads a gang of bank robbers. The drama is driven by strong violence, mysticism, and criticism of local bosses, who are corrupt and exploit the population. The main points of the production are the script that focuses on the moral and psychological dilemmas of the characters; the choice of a mostly northeast origin cast, and the investment in production, which grew infrastructure and logistics in the state of Paraíba, enabling complex action scenes¹⁵.

Os Outros is a Globoplay series written by Lucas Paraizo that premiered in May 2023. Its 12 episodes discuss the intolerance and difficulty of communicating in contemporary society. Set in a middle-class condo in Rio de Janeiro, two families get involved in a conflict started by a confrontation between their children. In an escalation of tension and violence, the families start showing a lack of emotional control and intolerance, adding to the parallel and shady local events as a background to criticize the complex integration of militias (para-police) in Rio de Janeiro.

The eight episodes of the series *Betinho – No Fio da navalha* were created by José Júnior and premiered in December 2023, in a co-production Globoplay and AfroReggae Audiovisual and Formata Produções. Based on the biography of sociologist Herbert José de Sousa (Betinho) – symbol of the fight against hunger in Brazil. The production was celebrated by the public and critics, being the only Brazilian work selected in six categories of the Cannes International Series Festival.

These highlighted series exemplified “Deep Brazil” in different genres and revealed stories of a diverse and complex country, paradoxically intolerant and supporting in the face of life challenges.

5.2. “Deep Brazil” in *Terra e Paixão*

The telenovela *Terra e Paixão*, written by Walcyr Carrasco and Thelma Guedes, was produced and aired by TV Globo in 221 chapters. Set in the fictional city of Nova Primavera, in Mato Grosso do Sul, a Midwest state of Brazil, the telenovela narrates the story of Aline, a teacher whose husband has been murdered at the behest of a powerful landowner. Interested in the widow’s land, the ruralist oppresses her and uses his influence to subvert laws with the support of the local police. After investigations, family problems, and media scandals, the farmer loses his power.

¹⁴ “Nordersten” (a word that unites Northeast Brazil with the American western) has gained strength since 1953 with the film *O Cangaceiro*, director Lima Barreto and is currently represented by the award-winning film *Bacurau* (Kleber Mendonça Filho and Juliano Dornelles, 2019) and the series *Cangaço Novo*.

¹⁵ The region of Campina Grande, the countryside of the state of Paraíba, is known as the “Brazilian Roliúde”.

As we know, the telenovela is an audiovisual product that dialogues with culture, updates and inserts new behaviors in people’s lives, dictates trends, and has educational potential, as it reflects and refracts society¹⁶ (Baccega, 2011) by building an imagined nation in which viewers recognize themselves (Lopes, 2009). The regional theme points to a slavery past, based on the construction of large estates and the appropriation of public goods for private interests, the dispute over land, and the search for justice in the face of the indifference of institutions (Hollanda, 1995).

The cast was composed by a black actress protagonist and characters representing various minorities, like the homosexual couple, Kelvin and Ramiro, who questioned the hegemonic masculinity (Connell, Messerschmidt, 2013); the transgender woman, Luana Shine, who discussed citizenship through access to night classes for youth and adult education; and yet the novelty of introducing an indigenous plot with indigenous actors who presented their culture with songs and dances, far from the common stereotypes.

The telenovela brought melodramatic elements such as the moral duality of the characters, the opposition between good and evil, the redemption of the villains, the emphasis on family issues, and a whole set of elements typical in the melodrama genre (Martins; Santos, 2009). A “Deep Brazil” made of contradictions and a tele-dramaturgy experience that highlights topics of real-life news.

5.3. The regulation of streaming

Streaming regulation was discussed in the Congress, and by the agents of the audiovisual market. Among the bills (PL) discussed on regulation, the controversial PL 2331/2022 gained power by trying to include streaming services in the Condecine (Contribution to the Development of the National Cinematographic Industry)¹⁷, with a 50% discount for productions and licensing of national content to boost financing sources and balance competitiveness between players and signed TV services (OTT). In addition, it suggests a 3% tax rate on revenues for investments in the sector, which is still low compared to the rates of other countries, reaching 20%.

After several changes, the text was approved by the Economic Affairs Committee of the Federal Senate, including a minimum on-screen quota for Brazilian productions. It is estimated that the project will be approved in 2024 to become law in 2025¹⁸.

The audiovisual sector considers the project a move forward that will provide significant cultural changes with plenty of space on platforms for national content and a consequent increase in demand for Brazilian productions. Through this regulation it is expected to combat piracy in the digital environment and to reinforce the intellectual property of audiovisual productions.

16 Veja Magazine. Interview: Maria Aparecida Baccega, 24 jan. 1996.

¹⁷ Taxation is levied on the broadcasting, production, licensing, and distribution of audiovisual works for commercial purposes, and the amount collected makes up the FSA (Audiovisual Sectorial Fund).

¹⁸ bit.ly/3WYjA3J

6. Theme of the year: What is happening to narratives in Ibero-American television fiction?

To answer the key question, we selected a production that offers an overview of the present, the past, and the future perspectives of the fictional narratives of Brazilian television. Created and written by Rosane Svartman, directed by Paulo Silvestrini and produced by TV Globo, this telenovela was exhibited from January 16 to August 11, 2023, from Monday to Saturday, in the 7 pm slot, *Vai na Fé*¹⁹ can be seen as a symbolic work in form, content, and modes of distribution and reception of what is happening with narratives in Brazilian television fiction, as we will try to demonstrate in the present analysis.

An urban telenovela, it starred Sheron Menezes, an actress with 20 years of experience on television who played the protagonist Sol, a black, evangelical woman, focused on her family, who ensures her survival by selling “quentinhas”.²⁰ Widowed, Sol decides to work as a backing vocal for singer Lui Lorenzo (José Loreto), beginning a set of conflicts and reunions of the protagonist with characters from her past, including Benjamin (Samuel de Assis), her first love, now married to Lumiar (Carolina Dieckmann), and Theo (Emílio Dantas), responsible for the breakup of the protagonist couple in the past.

This quintet of protagonists joins other characters to create a complex narrative involving relevant social topics, such as gender and sexual violence, racism, social and racial discrimination, smuggling, religiosity, bullying, homophobia, terminal illnesses, alopecia in homosexual relationships, and even ageism, a theme that rendered a scene of great repercussion played by Renata Sorrah (Wilma Campos).

Stories in *Vai na Fé*

Sol has always hidden from her daughter Jeniffer (Bella Campos) the true identity of the girl's father. It is only after the death of her foster father that the young woman discovers that she is not his daughter and starts her search for the truth, hidden from her by her mother – she is the result of a rape committed by Theo. Throughout her life, the protagonist feels guilty about what happened until other women begin to denounce the antagonist, taken to court only at the end of the story. The attorney responsible for his defense was Lumiar, with whom he had become romantically involved after she separated from Benjamin. Known as Ben, he is the great hero of the telenovela.

Lovers in their youth, when Sol danced in funk balls, they met again after 20 years due to Ben's involvement in the accident that killed Carlão, Sol's husband. When Jennifer seeks out the lawyer on her journey to discover her father's identity, the love triangle formed by Sol, Ben, and Lumiar reemerges.

¹⁹ The telenovela title *Vai na Fé* is a popular slang that can be translated by something like *Go with Faith*.

²⁰ Also known as lunchboxes, the “quentinhas” are popular meals stored in aluminum foil packages.

Representation and representativeness in *Vai na Fé*

There is a strong representativeness of Brazilian types in each chapter of *Vai na Fé*. They are ‘people like us’, which relates to how the narrative builds the characters. To this end, author Svartman and her team linked social problems to characteristics of the melodrama, such as manichaeism, different musical elements, and valuing the spirit of the family, the institution that establishes pedagogical and identity values with the popular audience, as Jesús Martín-Barbero (1997) points out, “(...) the enormous and thick entanglement of family relationships, which, as infrastructure, build up the dramatic plot, would be the way in which, starting from the popular, the opacity and complexity that cover the new social relations are understood and expressed” (p. 166).

Based on the characters Vitinho (Luis Lobianco), Yuri (Jean Paulo Campos) and the couple Clara (Priscila Sztejnman) and Helena (Regiane Alves), *Vai na Fé* includes, throughout the stories, LGBTQIA+²¹ representativeness. This is one aspect cause the great representativeness it is the mostly black cast, in prominent roles, and of different social backgrounds. Brazil is a country that has historically exploited enslaved, indigenous, and black people, and despite 55.5% of the population declaring itself black²², this is the first time a cast is composed mostly of black people. In the dialectic of fiction and reality that characterizes the Brazilian telenovela, *Vai na Fé* reflects and incorporates the struggles and achievements of the contemporary black population against structural and historical racism.

Narrative structure of *Vai na Fé*

The structure of *Vai na Fé* follows the standard plot of TV Globo’s 7 pm telenovelas. The story takes place in the present day, featuring comic cores, clear lighting, and agile editing. Set in Rio de Janeiro, the macro space presents its fixed environments, including a Law School, where meaningful topics are debated, and Lumiar (Carolina Dieckmann) is a professor. The first meeting of her character with Wilma Campos was one of the highlights of metalinguistic uses in a telenovela.

Lui Lorenzo’s mother, a shunned actress, is played by Renata Sorrah, who has among her most iconic roles the villain of *Senhora do Destino* (2004), “Nazaré Tedesco”, a character who kidnapped and raised Isabel, played by Carolina Dieckmann. After working on this hugely successful telenovela, the two actresses only met again in the scene of chapter 47 of *Vai na Fé*, marked by the first meeting between Lumiar and Wilma. In the metalinguistic scene, Lumiar asks Wilma the same question that her character Isabel asked her biological mother, Maria do Carmo, in the first meeting between them in *Senhora do Destino*: “Is everything okay?”. This sequence had great repercussions for the audience, something that occurred in many of Wilma’s

²¹ Acronym for lesbian, gay, bisexual, transgender, queer, intersex, asexual.

²² Census, 2022. In Brazil, the Census, a demographic study to collect information on the population, is organized by the IBGE - Brazilian Institute of Geography and Statistics. In this study, the identification of an individual as a black person occurs by self-declaration, with the total number of this population being stipulated from the sum of those who declare themselves black or brown.

scenes, thanks to shares on social networks, in acts of “spreading transmedia content” (Jenkins, 2014), a strategy of distribution and repercussion of content by which the telenovela was benefited and employed in its narrative.

In chapters 75 and 76, Wilma helps Érika (Letícia Salles) audition for *Vale Tudo – o Filme*, that should be a *cinematic remake* of one of the greatest telenovelas in the history of Brazilian television. The scene features a conflict between the characters, culminating in Wilma’s right to reply to Érika on social networks. In the response, ageism is addressed and linked to women, in a plot of great dramatic power. A production with social network aesthetics spread across the networks. But the highlight of the metalinguistics present in the telenovela was a scene in the penultimate chapter in which Wilma Campos meets the renowned authors, Glória Perez, Walcyr Carrasco, and João Emmanuel Carneiro, in person. In a scene written by collaborator Mário Viana, Wilma addresses the authors, quotes texts of iconic characters written by them, and proposes a toast to the telenovelas .

With this adopted metalinguistic exercise, *Vai na Fé* takes its Brazilian telefiction heritage, while points towards the future, gathering in the same scene three of the greatest writers in Brazil and in 2023. While Walcyr Carrasco and Glória Perez are the authors of two productions with the highest audience on open television this year, João Emmanuel Carneiro is the author of the first original Brazilian telenovela on streaming, “Todas as Flores”, a success of critics and audiences alike.²³

The “telenovela as a narrative of the nation” (Lopes, 2009) dialogues with the metaphor of the “Deep Brazil”, which is not restricted to a geographical concept. In an interview, *Vai na Fé* author, Rosane Svartman, says that some research done for her previous telenovela, *Bom Sucesso* (2019), found that a large part of the audience is evangelical.²⁴ The information shared by Svartman reflects the enormous growth of evangelical religions in Brazil to the point that there are projections that the 2022 census will reveal an increase in the evangelical population, going from approximately 22% in 2010 (around 42 million) to 30% of Brazilians in the current census (about 70 million).²⁵

We can also find the “Deep Brazil” in the religiosity expressed in the conversion of *Vai na Fé* protagonist Benjamin to Candomblé and in the evangelical characters of this telenovela, and also in the series *Cangaço Novo* (Prime, 2023). The religious elements present in these two works are an unequivocal sign of the hybridization of the coast and the hinterland implied in the contemporary conception of the “Deep Brazil”, as we anticipated in the Introduction above. In 2023, the regional theme was present in both the urban space of *Vai na Fé* and in stories set in the hinterland, like

²³ Since *Verdades Secretas 2* (2021), the first telenovela produced by Globoplay, is a continuation of Walcyr Carrasco’s homonymous telenovela on TV Globo in 2015.

²⁴ <https://veja.abril.com.br/coluna/tela-plana/rosane-svartman-explica-o-segredo-de-sucessos-como-vai-na-fe>.

²⁵ A demonstration of power in this scenario can be represented in the figure of the owner of TV Record. The second largest television broadcast in the country, which currently produces only biblical telenovelas, belongs to a pastor and founder of the Universal Church of the Kingdom of God.

the telenovelas *O Rei do Gado* (1996), once again successfully rerun in 2023; *Terra e Paixão* (2023), and *Travessia* (2023), this set partly in small towns in Maranhão, state in the Northeast.

Yet, in 2023, for the first time in the history of Brazilian tele-dramaturgy, all TV Globo productions had black characters as protagonists. By opting for black protagonism and for the link to traditional formal and thematic procedures of melodrama and Brazilian telenovela, addressing contemporary themes, and benefiting from the spreading content in other exhibition windows and for all exposed here, we defend that *Vai na Fé* is the production that best answers the question of the theme of this 2024 yearbook. With an average audience of 23.8 points (when the time slot goal is 25), it recovered part of the audience of the TV Globo 7 pm slot and rised to the third most watched program of the year on open television.

The Brazilian telenovela is a cultural product with hybrid characteristics. And hybridism is the hallmark of *Vai na Fé*, a story with numerous comic shades but with remarkable dramatic power and sensitivity to social issues and criticism. It’s “Deep Brazil” imagined by the writers in synergy with the imaginary and expectations of the audience and skillfully interpreted by the cast of the production.

Wilma Campos, embodied by actress Renata Sorrah, shows that the telenovela can still synthesize the past, present, and future of the main product of Brazilian audiovisual fiction. Although the telenovela extends to “other seas” and starts to tell narratives that assume the Brazilian people, its origin continues to be that of the melodramatic genre embraced by the naturalistic style in this main cultural product of Brazilian television.

Finally, the metalinguistic aspect of *Vai na Fé* – to honor the history of the Brazilian format and to document its time in form and content – ended up helping us to answer to the question of the theme of the Obitel Yearbook and also pointed to possible future paths of narratives in Brazilian television fictions.

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CHILE: 50 YEARS OF THE COUP D'ÉTAT AND MEMORY IN FICTION¹

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Authors²

Pablo Julio Pohlhammer <https://orcid.org/0000-0003-1387-4463>

Daniela Grassau <https://orcid.org/0000-0001-7846-8322>

Alejandro Bruna Silva <https://orcid.org/0000-0002-1217-2833>

Francisco J. Fernández Medina <https://orcid.org/0000-0001-6146-0375>

Team

Angela Godoy

Introduction

2023 was the last year of analog television in Chile. Its definitive switch-off, in April 2024, forced all traditional channels to finish implementing the second signals imposed by law, and they opted for informative, cultural and children's programs. The basic programming structures were maintained, with slight decreases in audiences, both in free-to-air and pay TV, as well as in the number of subscribers in the latter. The case of *streaming* is different: although there are no open subscriber figures, the growth in data consumption suggests an increase.

Regarding telenovela production, Mega's dominance is overwhelming. Neither Canal 13 nor TVN tried to compete and Chilevisión's only attempt was a failure. In other formats, TVN did participate, supported by independent production. In *streaming* platforms, the 10 serialized fiction titles mentioned were also exhibited in broadcast television and only two of them in platforms not related to the broadcast television channel that exhibited them.

The year 2023 marked the 50th anniversary of the 1973 coup d'état. The anniversary was widely covered on broadcast television, in different genres and formats and, naturally, also in fiction, so the highlights of the year are dedicated to the 50 years of the coup and its memory.

¹ The authors would like to express their gratitude to Kantar IBOPE Media Chile, without whose invaluable collaboration this work would not be possible.

² Pablo Julio, Daniela Grassau and Francisco Fernández are associate professors at the School of Communications of the Pontificia Universidad Católica de Chile. Alejandro Bruna is a doctoral student and Angela Godoy is a research assistant at the same faculty.

1. The Chilean Audiovisual Context in 2023

1.1 Free-to-air television in Chile

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

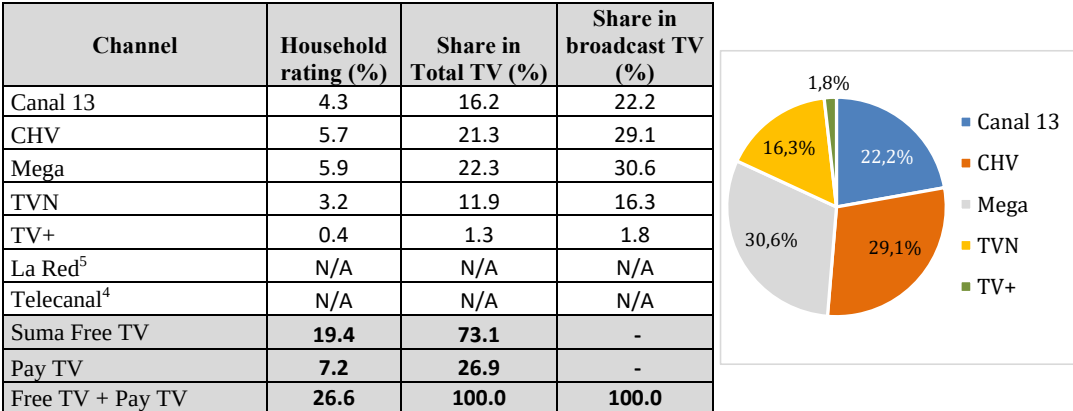
Private channels (6)	Public channels (1)
Canal 13: Luksic Group (Chilean). Chilevisión (CHV): Paramount Global. Mega: Bethia Group (Chilean) La Red: Albavisión Group. Telecanal: Albavisión Group (via third parties) TV+: Media 23 (Chilean, 90%), Pontificia Universidad Católica de Valparaíso (10%).	Televisión Nacional de Chile (TVN), financed by advertising.
Total of channels: 7	

Source: Obitel Chile.

Warner Bros Discovery decided to exercise its exit option from Mega and sold its 27.5% stake to the controlling group Bethia. With this, the presence of foreign ownership in free-to-air television channels is now limited to Paramaount Global, in Chilevisión. This without considering two other channels with a strong uncertainty about their future: La Red and Telecanal, belonging to Albavisión, which not only lost US\$ 12 and US\$ 1.3 million respectively last year, but accumulated losses of US\$ 42 and US\$ 8 million in the last five years. In the other channels the situation is varied, but without calling into question their continuity: Mega earned US\$ 10.4 million, CHV US\$ 1.5 million, Canal 13 lost US\$ 2.7 million, TV+ lost US\$ 0.7 million and TVN lost US\$ 6.6 million, but in this case 63% of these accounting losses are actually the start-up and operating costs of NTV, the new children’s channel operated by TVN. This channel will operate with direct public funding, unlike TVN, which is self-financed by advertising.

A significant structural change took place this year, marking the end of analog television. After successive postponements, the analog switch-off process ended on April 15, 2024. Therefore, during 2023, free-to-air TV channels had to prepare themselves to comply with the minimum of two signals that the law would require as of 2024 in order not to lose the concession. TVN did it with its children’s-cultural signal NTV; Canal 13 inaugurated a news channel, Canal 13 en Vivo; Mega launched Mega 2, a cultural channel; and Chilevisión, whose concession belongs to Universidad de Chile, delegated this second signal to the university, which now operates its own channel.

Figure 1. TV rating and share by station during 2023 ³

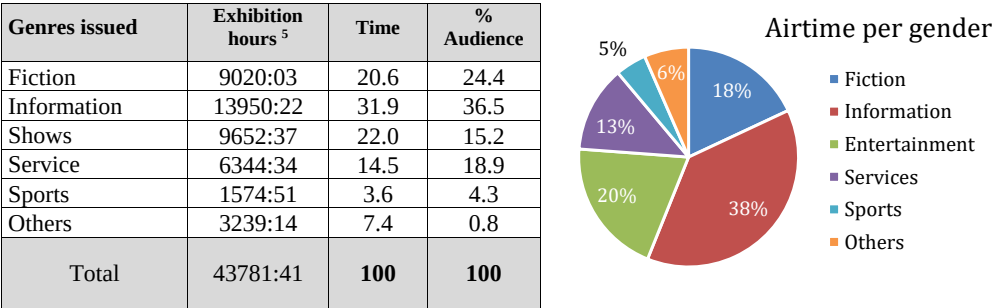


Source: Kantar IBOPE Media Chile - OBITEL Chile.

4

The 2022 tie for first place between Mega and Chilevisión this year turned slightly towards Mega, partly due to the failure of Chilevisión to return to the production of national telenovelas for the time slot before the main newscasts. For the third consecutive year, both channels distanced themselves from TVN and Canal 13. These channels suffered their lowest audience levels in 2023, registering their worst and third worst performance since measurements have been made.

Figure 2. Genres and hours of TV programming during 2023



Source: Kantar IBOPE Media Chile - OBITEL Chile.

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Considering the same channels in both years, the distribution of time and audience is very similar between 2022 and 2023. The biggest difference was the 50% increase

³ Graph 1 shows the average audiences for the 24 hours of the day. If we only consider the interval from 7am to 1am, called the *TV day* in the industry, the *rating* of free-to-air TV channels is 18% higher, on average. In the case of pay TV, the increase is 14%.

⁴ Data from Telecanal and La Red are not included in graphs 1 and 2 because they are not being reported by Kantar Ibope Media due to the fact that they no longer subscribe to the measurement system. The last times they were measured, they yielded average audiences of 0.1% and 0.5%, respectively. For the rest of the report, this omission is not relevant since neither of them broadcasts television fiction of Ibero-American origin, except for some sporadic, non-significant exceptions.

⁵This table includes the first signals of national free-to-air television channels, excluding La Red and Telecanal as mentioned in note 4.

in time and audience for sports programs. The reason is that Santiago hosted the 2023 Pan American Games. However, the increase in actual time dedicated to covering the games was greater than 50%, since it also permeated other categories, such as information. There was also an increase in the time devoted to fiction, which reversed a downward trend that had been steadily observed for more than a decade.

1.2 Pay TV in 2023

The number of households subscribing to pay-TV peaked in 2018, reaching 55% of Chilean households. Since then, it has been falling back to 45% in 2023. That drop in penetration (18%) is greater in terms of audience: in the same period, the pay-TV audience has declined by 53%. Not only are there fewer households with access to pay-TV, but those who do have access are watching less of it than before. It is inevitable to attribute this to the growth of *streaming* as a substitute. Probably one barrier to the decline of pay-TV is that the same operators that offer it are the main providers of broadband internet to households and sell both services bundled together.

Table 2. Pay TV channels in Chile

10 most watched pay TV channels in Chile in 2023			
Channel	Genre	Origin	Rating home ⁶ ⊕
24 Hours	Information	Chile	0.38
Tierra Brava	Live Reality	Chile	0.33
TNT Sport HD	Sports	Chile	0.32
Universal TV	Fiction	Foreign	0.28
AXN	Fiction	Foreign	0.25
TNT Series	Fiction	Foreign	0.24
Cartoon Network	Children's	Foreign	0.22
ESPN	Sports	Chile	0.21
TNT	Fiction and +	Foreign	0.21
Space	Fiction and +	Foreign	0.20

6

Source: Kantar IBOPE Media Chile.

Table 2 is similar to that of 2022: eight of the 10 channels back then remain to this day, but all with lower ratings, and 24 Horas leads the list. However, there are significant changes. First, CNN Chile, a pioneer in pay-TV news broadcasting in Chile since 2008, dropped out of the top 10 after ranking second the previous year. This coincided with its move from being directly owned by Warner to being a franchise operated by a local entrepreneur. Another novelty is *Tierra Brava*, as the second most watched channel is dedicated to the continuous transmission of a *reality show*

⁶ Calculated over 24 hours a day.

from Canal 13. It seems to be the return of a genre that dominated Chilean television 15 years ago.

1.3 Sources of financing for the audiovisual sector

The financing of Chilean television is mainly advertising. The State provides competitive funds that are a contribution to the development of quality programs, but while the resources provided by the National Television Council (CNTV) fund were US\$ 5.7 million in 2023, advertising resources amounted to US\$ 285.9 million. Ninety-eight percent of the resources come from advertising and two percent from the CNTV. These proportions have been constant for the last five years. This complete dependence of free-to-air television on advertising investment, including the public channel, makes its evolution worrying, following the same trends as in the rest of the world. Television advertising investment in 2023, measured in dollars, was 80 percent of what it was five years ago and 56 percent of what it was ten years ago.

However, the CNTV's participation in TV financing, which does not pay its basic operation, can be a contribution to the production of quality fiction pieces, when it manages to articulate with international financing through co-productions. An advance in this sense has been that the CNTV will make its rules more flexible, allowing premieres on *streaming* platforms to occur before being broadcast on an open television channel, which facilitates these agreements with platforms to be carried out.

14. Communication policies

After the rejection of the constitutional proposals of the Constitutional Convention (2022) and the Constitutional Council (2023), both with proposals in the field of communications, the spirit of reform in Chile has subsided, at least for a while. However, it is worth highlighting two actions aimed at facing the changes that are taking place.

The government convened a commission, composed of leading academics, to diagnose and propose actions to address the phenomenon of disinformation. The convening of the commission raised suspicions about the government's motivations, but these were overcome by the quality of the diagnosis and the prudence of its recommendations. The recommendations highlight the need for a multidimensional approach, the importance of international collaboration and transparency, and focus on disinformation in social networks, electoral processes, cybersecurity and public health, stressing the importance of media literacy and the strengthening of the media, promoting transparency, the protection of human rights and the protection of the integrity of information and democracy.⁷

⁷ Available at <https://minciencia.gob.cl/areas/comision-contra-la-desinformacion/> (revised 01/04/2024)

A second report, which may have long-term effects, is the “Digital Transformation Strategy: Chile Digital 2035” developed by the Senate’s Transport and Telecommunications Commission, with the collaboration of other institutions. It aims at the digital transformation of Chile, promoting an inclusive and sustainable development in all sectors of society.⁸

1. 5 Digital and mobile connectivity infrastructure

Ookla is a North American company that provides Internet speed measurements used in various indexes, such as the *Digital Quality of Life Index*. According to its measurements, Chile ranks 73rd in the world in mobile connection speed and third in fixed connection speed.⁹ On the other hand, in terms of *infrastructure*, understood as a measure that synthesizes the level of use of the population and the country’s installed capacity to take advantage of the opportunities of information technologies, the *Digital Quality of Life Index* ranks Chile 35th in the world and first in Latin America.¹⁰

Regardless of Chile’s positions in the *rankings*, the Undersecretariat of Telecommunications keeps a historical record of the availability of both fixed and mobile data connections. By December 2023, the number of 3G, 4G and 5G mobile connections, those useful for *streaming* consumption, exceeds the size of the population by 12.¹¹ As for fixed connections, considering only those for residential use, which are the relevant ones for access to audiovisual consumption, they reach 62 of Chilean households.¹² All this indicates that Chile has very good conditions for the consumption of *online* digital content.

⁸ Available at <https://www.cepal.org/es/publicaciones/49067-estrategia-transformacion-digital-chile-digital-2035> (revised 08/06/2024)

⁹ Available at <https://www.speedtest.net/global-index> (revised 12/06/2024)

¹⁰ Available at <https://surfshark.com/dql2023/methodology> (revised 12/06/2024)

¹¹ They exceeded the number of inhabitants in 2018. The excess amount is explained in connections for professional use or used for equipment connections, such as ATMs, card collectors or positioning systems, among others. The connection statistics are available on the Subtel site, at <https://www.subtel.gob.cl/estudios-y-estadisticas/internet/> (revised on 24/05/2024)

¹² Growth averaged 5%, except in the pandemic years, 2020 and 2021, when it grew at 12% per year.

2. Analysis of the Year: National and Ibero-American premiere fiction on free-to-air TV.¹³

TABLE 1. First-run fiction films screened in 2023

UNPUBLISHED NATIONAL TITLES - 10	UNPUBLISHED FOREIGN TITLES - 8
CHV	Canal 13
1. <i>Dime con Quién Andas</i> (telenovela)	1. <i>Gloria Trevi: Ella Soy Yo</i> (series-USA-Hispanic)
Mega	CHV
2. <i>Como la Vida Misma</i> (telenovela)	2. <i>Pantanal</i> (telenovela -Brazil)
3. <i>Generación '98</i> (telenovela)	Mega
4. <i>Hijos del Desierto</i> (telenovela)	3. <i>Corazón de Madre</i> (telenovela-Brazil)
5. <i>Juego de Ilusiones</i> (telenovela)	4. <i>Corran por sus Vidas</i> (telenovela-Brazil)
6. <i>La Ley de Baltazar</i> (telenovela)	5. <i>Éramos Seis</i> (telenovela-Brazil)
TVN	6. <i>Orphans of their Land</i> (telenovela-Brazil)
7. <i>Alma Negral</i> (series)	7. <i>Sol Naciente</i> (telenovela -Brazil)
8. <i>Cecilia la Incomparable</i> (miniseries)	TVN
9. <i>La Sangre del Camaleón</i> (miniseries)	8. <i>Café con Aroma de Mujer</i> (telenovela-USA-Hispanic)
10. <i>La Vida de Nosotras</i> (unitary)	
	UNPUBLISHED OBITEL CO-PRODUCTIONS - 1
	TVN
	1. <i>Los Mil Días de Allende</i> (miniseries - Obitel co-production)
	TOTAL UNPUBLISHED TITLES: 19

Source: Kantar IBOPE Media Chile - OBITEL Chile.

Since Mega shook the industry in 2014, first by snatching from TVN almost its entire fiction production area, then by bursting in the first quarter with the first Turkish production broadcast in Latin America, *Las Mil y Una Noches*, and finally, by starting to broadcast in the fourth quarter *Pituca sin Lucas*, its first telenovela of this new era, Mega has been progressively transforming itself into an almost monopolistic player.

Since the early 1980s and for more than 30 years, TVN and Canal 13, which were a duopoly in Chilean telenovelas, in 2023, for the first time, neither produced any telenovela. The case of TVN is more significant: at the beginning of 2024, it sold to Mega the scripts of its most emblematic telenovelas of the golden age of Chilean telenovelas: *La Fiera* (1999), *Amores de Mercado* (2001) and *El Señor de la Querencia* (2008), which, in practice, is a declaration of renunciation to participate again in that industry.

The other actor among the four main channels is CHV, which after its purchase by Paramount Global had an unpromising start in its return to telenovela production,

¹³ In this report, the programming of La Red is no longer reported, as was the case of Telecanal in previous years. For the purposes of Chilean fiction production it is irrelevant, because they have never produced it, but La Red does broadcast low-cost Ibero-American productions. La Red has incurred losses of more than US\$40 million in the last five years and has been excluded, for non-payment, from the programming measurement and registration systems.

which it had abandoned in 2020. *Dime con Quién Andas*, had a good start in *prime* time with 16 points of home *rating*, but in the second episode it dropped by half and by the ninth it was already at four points. After that, it was moved to nighttime.

TABLE 1b. Exhibit of securities replaced during 2023

NATIONAL SECURITIES SPARE PARTS - 21	FOREIGN SECURITIES SPARE PARTS - 12
Canal 13	Canal 13
1. <i>Los 80: Más que una Moda</i> (series)	1. <i>Yo Soy Betty, La Fea</i> (telenovela-Colombia)
CHV	2. <i>Doña Bárbara</i> (telenovela-Mexico)
2. <i>Cesante</i> (unitary)	CHV
Mega	3. <i>Justicia</i> (miniseries-Brazil)
3. <i>Amar Profundo</i> (telenovela)	Mega
4. <i>Casa de Muñecos</i> (telenovela)	4. <i>Aguanta Corazón</i> (telenovela -Brazil)
5. <i>Casado con Hijos</i> (sitcom)	5. <i>Corazón de Madret</i> (telenovela-Brazil)
TVN	6. <i>Dulce Ambición</i> (telenovela-Brazil)
6. <i>Celeste</i> (series)	TVN
7. <i>Cuentos Chilenos</i> (telefilm)	7. <i>El Clon</i> (telenovela-Brazil)
8. <i>El Cuento del Tío</i> (unitary)	8. <i>Terra Nostra</i> (telenovela -Brazil)
9. <i>El Día Menos Pensado</i> (docudrama)	9. <i>Celia, la Serie</i> (telenovela-Colombia)
10. <i>En Terapia</i> (series)	10. <i>Enigma</i> (unitary-Spain)
11. <i>Iorana</i> (telenovela)	11. <i>Raphael</i> (miniseries-Spain)
12. <i>La Gabriela</i> (telefilm)	12. <i>Hasta que te Conocí</i> (miniseries-Mexico)
13. <i>La Vida es una Lotería</i> (unitary)	OBITEL COPRODUCTIONS ANSWERS - 2
14. <i>Mea Culpa</i> (docudrama)	Canal 13
15. <i>Mea Culpa Clásicos</i> (docudrama)	1. <i>Pasión de Gavilanes</i> (telenovela - Obitel co-production)
16. <i>Mea Culpa: El Regreso</i> (docudrama)	CHV
17. <i>Nuestros Cuentos Chilenos</i> (telefilm)	2. <i>Inés del Alma Mía</i> (miniseries - Obitel co-production)
18. <i>Teresa de los Andes</i> (miniseries)	
19. <i>Una Historia Necesaria</i> (series)	
TV+	
20. <i>Los Años Dorados</i> (sitcom)	
21. <i>Los Venegas</i> (sitcom)	
	TOTAL UNPUBLISHED TITLES: 35

Source: Kantar IBOPE Media Chile - OBITEL Chile

Although they occupy secondary schedules compared to premiere fiction, reruns have a significant role in programming. In 2023, there was 17% more time dedicated to Ibero-American reruns than to premiere fiction and the premiere/fiction ratio is similar in the different channels to the one they had in 2022. However, the differences between channels are notorious. TVN again makes intensive use of them, taking advantage of the size of its catalog of successful productions, even rerunning *Teresa de los Andes*, a miniseries premiered in 1989. Canal 13, which has a catalog as large as TVN’s, made practically no use of it. In 2023 it only rebroadcast one series, *Los 80*, decreasing the already limited use of this resource in 2022, when it had rebroadcast two telenovelas.

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

Format	Titles						Hours					
	2019	2020	2021	2022	2023	Total	2019	2020	2021	2022	2023	Total
Telenovela	11	5	7	7	6	36	682:30	224:55	545:00	457:00	470:50	2380:15
Series	4	6	2	2	1	15	61:00	44:35	20:50	19:55	11:25	157:45
Miniseries	1	1	3	0	3	8	3:00	4:30	10:45	0:00	11:45	30:00
Telefilm	1	0	0	0	0	1	0:55	0:00	0:00	0:00	0:00	0:55
Unitaries	0	0	0	0	1	1	0:00	0:00	0:00	0:00	2:30	2:30
Docudrama	0	0	1	0	0	1	0:00	0:00	10:05	0:00	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	12	13	9	11	62	747:25	274:00	586:40	476:55	496:30	2581:30

Source: Kantar IBOPE Media Chile - OBITEL Chile

As in 2022, 2023 shows a marked concentration of national fiction in telenovela, reaching 95 in both years. By its nature, telenovela generates more broadcast hours than other formats, but it contrasts with the 72 it reached 10 years ago and the 66 of 15 years ago.

TABLE 3. Ibero-American premiere fiction exhibited in Chile in 2023: countries of origin

Country	Titles		Hours	
NATIONAL (total)	11	57.9	496:30	51.2
OBITEL COUNTRIES (total)	8	42.1	473:30	48.8
Argentina	0	0.0	0:00	0.0
Brazil	6	31.6	442:10	45.6
Chile	10	52.6	491:50	50.7
Colombia	0	0.0	0:00	0.0
Ecuador	0	0.0	0:00	0.0
Spain	0	0.0	0:00	0.0
U.S. Hispanic	2	10.5	31:20	3.2
Mexico	0	0.0	0:00	0.0
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
COPRODUCCIONS (Totals)	1	5.3	4:40	0.5
National Co-Productions	1	5.3	4:40	0.5
Co-Productions Obitel Countries	0	0.0	0:00	0.0
TOTAL	19	100.0	970:00	100.0

Source: Kantar IBOPE Media Chile - OBITEL Chile

When comparing table 3 with that of the previous year, the most significant fact is the disappearance of Mexico, which accounted for 23 of the hours. Twenty percent

of this is due to the fact that it was effectively displaced by Turkish fiction, but the remaining 80 percent is explained by the fact that the table does not include La Red, as is explained in the note 12. Although its audiences, when measured, were marginal, they contributed hours of programming.

The second significant warning is what the table omits: Turkish fiction, which accounts for 57% of the screen time, while Chilean and Ibero-American fiction share the remaining 43%, almost equally. Regarding the audience, the displacement of Ibero-American fiction deepens. It only reaches 8 of the audience, while Chilean fiction reaches 49 and Turkish fiction the remaining 43.¹⁴

TABLE 4. Formats of national and Ibero-American fiction exhibited in 2023

Format	Titles				Hours			
	National	%	Rest Obitel	%	National	%	Rest Obitel	%
Telenovela	6	54.5	7	87.5	470:50	94.8	471:00	99.5
Series	1	9.1	1	12.5	11:25	2.3	2:30	0.5
Miniseries	3	27.3	0	0.0	11:45	2.4	0:00	0.0
Telefilm	0	0.0	0	0.0	0:00	0.0	0:00	0.0
Unitaries	1	9.1	0	0.0	2:30	0.5	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	8	100	496:30	100	473:30	100

Source: Kantar IBOPE Media Chile - OBITEL Chile

The omission of La Red in this table makes the panorama ~~it shows~~ less complete, but paradoxically, more honest. With programs such as *La Rosa de Guadalupe*, 150 hours of unitarios were added, showing diversity in what was imported from Ibero-America, but invisible diversity that averaged 0.8 household *rating*. The fact is that, except for anecdotal exceptions, what is seen in Chile of premiere Ibero-American television fiction are only telenovelas, mainly Brazilian.

¹⁴ References to Turkish participation are related to premiere fiction. When including reruns, the participation of Chile and Ibero-America increases.

TABLE 5: 10 Most watched titles in 2023

Title		Channel	Production Company (Country)	Format/genre	No. of cap/ep in 2023	Time zone	Rating	Share
1	<i>La Ley de Baltazar</i>	Mega	Mega/Chilefilms (CL)	Telenovela /Drama	88	Prime time	17.2	28.5
2	<i>Como la Vida Misma</i>	Mega	Mega/Mazal (CL)	Telenovela/Romantic Comedy	162	Prime time	15.0	22.6
3	<i>Generación 98</i>	Mega	Mega/Chilefilms (CL)	Telenovela /Drama	117	Prime time	14.7	23.0
4	<i>Hijos del Desierto</i>	Mega	Mega/Mazal (CL)	Telenovela /Drama	89	Prime time	12.7	21.1
5	<i>Juego de Ilusiones</i>	Mega	Mega/Mazal (CL)	Telenovela / Melodrama	245	Afternoon	12.5	26.1
6	<i>Gloria Trevi: Ellas Soy Yo</i>	Canal 13	TelevisaUnivision (MX)	Series/ Biopics	4	Nocturno	8.4	19.2
7	<i>Alma Negra</i>	TVN	TVN/Bicycle Thief (CL)	Series/ True crime	9	Prime time	6.3	11.5
8	<i>Cecilia la Incomparable</i>	TVN	Hugo Miller Productions (CL)	Miniseries/ Biopics	2	Prime time	5.8	9.6
9	<i>Huérfanos de su Tierra</i>	Mega	Rede Globo (BR)	Telenovela / Drama	48	Afternoon	5.5	13.2
10	<i>Los Mil Días de Allende</i>	TVN	Parox (CL) + Others	Miniseries/ Drama	4	Prime time	5.1	8.5
Total domestic productions: 8				Original foreign scripts: 2				
80				20				

Source: Kantar IBOPE Media Chile - OBITEL Chile

Unlike 2022, dominated by Mega, the *Top 10* of 2023 gives space to titles broadcast by other channels, both of national and foreign origin, although only in formats other than telenovela. It should be noted that all the *Top 10* of national origin were produced externally, either by order or as independent production. Two of these production companies, Mazal and Chilefilms, have ALREADY consolidated as the main telenovela developers in Chile. Turkish television fiction is a direct competitor of Ibero-American fiction, it should be considered that, if included in Table 5, four Turkish telenovelas would enter the list.

TABLE 5b: 10 Most watched national titles in 2023

Title		Channel	Production Company (Country)	Format/genre	No. of cap/ep in 2023	Time zone	Rating	Share
1	<i>La Ley de Baltazar</i>	Mega	Mega/Chilefilms (CL)	Telenovela /Drama	88	Prime time	17.2	28.5
2	<i>Como la Vida Misma</i>	Mega	Mega/Mazal (CL)	Telenovela/Romantic Comedy	162	Prime time	15.0	22.6
3	<i>Generación 98</i>	Mega	Mega/Chilefilms (CL)	Telenovela /Drama	117	Prime time	14.7	23.0
4	<i>Hijos del Desierto</i>	Mega	Mega/Mazal (CL)	Telenovela /Drama	89	Prime time	12.7	21.1
5	<i>Juego de Ilusiones</i>	Mega	Mega/Mazal (CL)	Telenovela / Melodrama	245	Afternoon	12.5	26.1
7	<i>Alma Negra</i>	TVN	TVN/Bicycle Thief (CL)	Series/True Crime	9	Prime time	6.3	11.5
8	<i>Cecilia la Incomparable</i>	TVN	Hugo Miller Productions (CL)	Miniseries/Biopics	2	Prime time	5.8	9.6
10	<i>Los Mil Días de Allende</i>	TVN	Parox (CL) + Others	Miniseries/Drama	4	Prime time	5.1	8.5
11	<i>La Vida de Nosotras</i>	TVN	TVN/BTF Media (CL)	Unitarians/True Crime	4	Prime time	4.6	7.9
13	<i>La Sangre del Camaleón</i>	TVN	Collective Intelligence (CL)	Miniseries/Drama	4	Prime time	3.9	6.9
				Original foreign scripts: 0				
				0				

Source: Kantar IBOPE Media Chile - OBITEL Chile

Table 5b shows the 10 most watched national fictions, out of a total of 11. The one excluded is *Dime con Quién Andas*, from CHV, which was removed from *Prime* due to its dismal ratings.

Ten years ago, this table was unnecessary because the 10 most watched had always been national. An additional fact that shows the decline in the consumption of telenovelas in Chile: the last one in the Top 10 of 2013 was *Dama y Obrero* with 14.4 rating. That result would put it in fourth place this year.

TABLE 6: 10 Most watched titles in 2023

Title		Channel	Sex		GSE			
			Women	Men	ABC1	C2	C3	D
1	<i>La Ley de Baltazar</i>	Mega	67	33	8	19	32	42
2	<i>Como la Vida Misma</i>	Mega	68	32	8	18	38	36
3	<i>Generación 98</i>	Mega	66	34	10	19	35	36
4	<i>Hijos del Desierto</i>	Mega	64	36	8	18	34	41
5	<i>Juego de Ilusiones</i>	Mega	69	31	8	16	26	50
6	<i>Gloria Trevi: Ellas Soy Yo</i>	Canal 13	65	35	6	17	29	48
7	<i>Alma Negra</i>	TVN	63	37	11	17	27	45
8	<i>Cecilia la Incomparable</i>	TVN	64	36	8	12	29	51
9	<i>Huérfanos de su Tierra</i>	Mega	66	34	7	14	32	47
10	<i>Los Mil Días de Allende</i>	TVN	53	47	15	28	21	37

Title		Age						
		04 - 12	13-17	18-24	25-34	35-49	50-64	65-+
1	<i>La Ley de Baltazar</i>	3	3	5	12	24	26	27
2	<i>Como la Vida Misma</i>	5	3	5	14	25	26	22
3	<i>Generación 98</i>	3	3	5	13	24	26	25
4	<i>Hijos del Desierto</i>	3	3	6	11	24	28	27
5	<i>Juego de Ilusiones</i>	4	2	4	10	20	25	35
6	<i>Gloria Trevi: Ellas Soy Yo</i>	5	1	6	13	28	24	22
7	<i>Alma Negra</i>	2	4	3	12	21	26	33
8	<i>Cecilia la Incomparable</i>	1	1	2	9	11	20	56
9	<i>Huérfanos de su Tierra</i>	3	2	6	10	20	24	35
10	<i>Los Mil Días de Allende</i>	1	1	0	16	22	26	34

Source: Kantar IBOPE Media Chile - OBITEL Chile

The audience profiles of the *Top 10* productions follow the usual pattern, with two exceptions. One is *Cecilia la Incomparable*, which shows a high proportion of audiences over 65. The explanation lies in its content. It is a *biopic* of a singer, a youth idol of the 60s and early 70s, so the proximity is natural. The other is *Los Mil Días de Allende*, released close to the commemoration of the 1973 military coup, which explains a political or historical motivation to watch it, hence its audience is less female than usual, with a higher proportion of higher socioeconomic groups and older.

3. VoD 2023 Monitoring

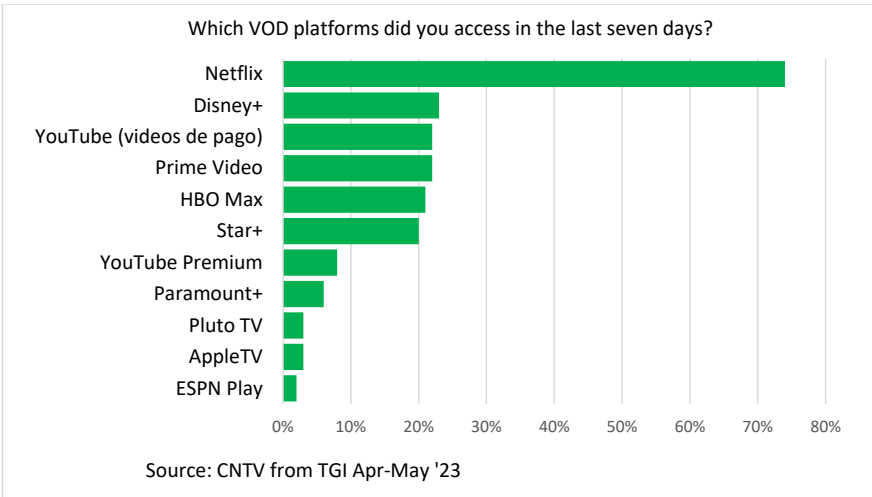
3.1. VoD Platforms Market

None of the main *streaming* companies report their subscriber figures in Chile, which makes it necessary to resort to estimates made by other companies, with methodologies and criteria that are often not comparable. A common source is JustWatch, which places Netflix with a 21-market share, followed closely by Prime

Video, with 20.¹⁵ However, despite its popularity, this study does not measure the number of users but offers a measure of interest in these services. Its numbers are very different from those of other sources that do attempt to estimate numbers of users or preferences among options. Among these is FlixPatrol, which estimates the number of Netflix users in Chile at 1.5 million (2024) and the number of Prime Video users at 300,000 (2022). Unfortunately, these estimates of the number of users are not available for other platforms or for all years.

In a different approach, the National Television Council (CNTV) published in February 2024 an estimate of the population’s access levels to different types of media, based on the TGI (Target Group Index) study by Kantar Ibope Media Chile. According to this source, the question “What platforms did you access in the last seven days?”:

Figure 3. Persons accessing the main international VoD platforms



Netflix dominates in the top spot, followed by a virtual tie between: Disney+, YouTube, Prime Video, HBO Max and Star+. They also show that a high percentage of the population declares having accessed these platforms, either as a direct or indirect user. On the other hand, despite the intense promotion that Pluto TV has had in CHV (as well as from Paramount Global), executives of this channel comment that it has been very far from reaching its user goals in Chile.

Without direct information on the evolution of *video on demand* consumption, one option is to resort to indirect measures, such as Internet data traffic. The *2024 Global Internet Phenomena Report*, prepared by Sandvine,¹⁶ shows that *video on demand* accounts for 57% of download data traffic among the different countries in the Americas, where the dominant applications in this traffic are YouTube (14), Prime Video (11) and Netflix (11).¹⁷

¹⁵ JustWatch Streaming Charts Chile (Q42023)
¹⁶ The full report can be downloaded from https://www.sandvine.com/hubfs/Sandvine_Redesign_2019/Downloads/2024/GIPR/GIPR%202024.pdf.
¹⁷ In the case of Europe, the volume of downstream traffic explained by VoD would be 63% and the main applications YouTube (15%), Netflix (15%) and DAZN (7%).

On the other hand, the Undersecretariat of Telecommunications regularly reports the data traffic carried in Chile by fixed and mobile networks.¹⁸ In recent years, the increase in the volume of downstream data, presumably driven by *streaming on demand*, has had an almost linear growth, increasing by an average of 5.3 million TB per year. This implies a decreasing, but still very high, rate of over 20 per year, more than 10 times the growth of economic activity. None of this suggests that *on-demand streaming* consumption is near its peak.

3.2. Supply of local VoD platforms in 2023

The offer of VoD services in Chile is as wide as in any country with free access to the web. However, the list of popular platforms is limited, as shown in Figure 3, all of them being international. The CNTV report also includes national VoD platforms, but they are not identified as they did not exceed 1 reach.

Focusing attention only on national VoD platforms, regardless of their degree of popularity, 2023 shows little change from the previous year. At least in that part of the offer that is visible, since the reduction in costs means that many organizations are now able to make their own content libraries available to the public.

A relevant actor in the supply of VoD platforms is the State. Its offer is dispersed among its different services, where it is worth mentioning:

- CNTV Play: The National Television Council, the agency in charge of regulating television. It also plays a role in fostering and promoting the quality and diversity of content by providing competitive funds. All productions that have received funding from the CNTV must be available on this platform, which can only be accessed from Chile.

- Children's CNTV: In addition to the works that have benefited from its competitive fund, CNTV also makes available to the community through this platform and national television channels an offer of educational content for children.

- Ondamedia: The role of promotion that the CNTV plays for television, with respect to film, is assumed by the Ministry of Culture, Arts and Heritage. Similarly, all works that have received funding from this ministry are available on this platform. In addition to facilitating free access for the population, it is a mechanism for transferring resources to creators. With limits to the amounts and other safeguards, each time a film is seen by a person, a payment is generated to its creators.

- TVN Play offers a large part of its historical catalog of fiction productions and other genres. It is also an access channel to its different signals: the main TVN signal, the children's channel nTV, TVN 3 and the international signal TVN Chile.

- TV Senado, in addition to providing access to floor and committee sessions, offers journalistic programs on legislative activity and the Congress of the Future conferences.¹⁹

- Cineteca Nacional: It is the organization in charge of promoting, preserving and conserving the country's cinematography and audiovisual heritage. In addition to its

¹⁸ The series reported by the Undersecretariat can be consulted at the institutional site: <https://www.subtel.gob.cl/estudios-y-estadisticas/internet/>.

¹⁹ The Chamber of Deputies also has a platform, but it is limited to the recording of floor sessions.

work with physical materials, it offers a VoD access service to some of the materials it preserves.²⁰

- USACH Heritage Archive: This archive of the Universidad de Santiago, in its audiovisual area, preserves historical materials of the Universidad Técnica del Estado, of which the Universidad de Santiago is the continuator.

In the private university sphere, the UC Film Archive of the Pontificia Universidad Católica de Chile has a similar vocation to that of the University of Santiago, in its historical dimension, but which has continued to grow until today. Apart from Estadio TNT Sports Chile, where its subscribers can follow the local soccer tournament and related content, the main private offer of VoD services comes from the free-to-air television channels themselves and pay TV operators.

In the case of the former, Canal 13's 13Now and Mega's Mega Go stand out. The former is a free service, and the latter is a paid service. CHV does not have its own application, but is part of the free service Pluto TV, of Paramount Global, the owner of the television signal. Similarly, pay TV operators offer *streaming* services, both live and VoD, which can be free, rental or purchase. The operators that offer platforms are Movistar Play, Entel Go, DirecTV Go. In the case of VTR+ and Claro Video, it is likely that they will converge to a single platform after the merger of the companies.

In 2020, a new Chilean platform was launched, focused on Latin American content, with the ambition of expanding first to Argentina and then to the rest of the continent, including the U.S. Its novelty was its advertising funding. To date, it is still operating in Chile, Argentina and Colombia. It even secured a new round of financing for US\$700,000 in 2023 and would have had advertising sales of US\$135,000 in 2022, in addition to more than 350,000 active users. However, its presence in the media and social networks is minimal.²¹

3.3. VoD analysis in 2023: national premiere fiction and co-productions.

2023 was a year in which the major international *streaming* platforms did not display the expression "Original Production" when premiering Chilean series. Neither were works by the larger Chilean independent production companies that usually work with those companies seen on Netflix or Prime Video. Both companies had given signals that they would reduce their production in Chile and that it would be limited to films. Of the 10 Chilean series released in 2023, eight were shown on platforms related to the TV channels that showed them.

²⁰ The film library's online exhibition does not include all of its materials, but it does maintain a somewhat hostile online catalog, available at this address, neither user-friendly nor easy to find: <https://cinetecanacional-bd.cl/acervo/8320ba399a46a571140bea0780b119917d74a0fc/ffb3a13e1b09dcd4663930b3b118ae5f992221b5/index.php?mp=hom&mh=>.

²¹ <https://ecosistemastartup.com/blog/actualidad/riivi-recauda-us700-mil-a-traves-de-broota-que-inversionistas-apostaron-por-esta-plataforma/> (accessed on 20-05-2024)

Table 7 shows five titles shown in both Mega Go and Mega, which is the owner, where, in addition to its own fiction contents, other contents and live signals are also shown. With *Dime con Quién Andas* the situation is similar, but here the open television channel was Chilevisión and the *streaming* platform Paramount+, both owned by Paramount Global. The case of TVN is slightly different. *Alma Negra* and *La Sangre del Camaleón* are two series shown by TVN and produced through independent production companies that are available on the TVN Play platform (free). However, they were also published on YouTube, thus eliminating any possibility of them being commercialized at a later date.

The other two cases are independent productions that are shown on an open television channel and a *streaming* platform. *Los Mil Días de Allende* was produced as part of the commemoration of the 50th anniversary of the 1973 coup d'état and is a Chilean-Spanish co-production. It was shown by TVN and is hosted on the RTVE Play platform but cannot be viewed from Chile. *Bravura Plateada* appeared in Table 1 as *Cecilia la Incomparable*. It is the same miniseries, independently produced, that received the first name for its exhibition in Prime Video, while the second was used for TVN in open television.

**TABLE 7. Domestic titles and premiere co-productions
exhibited in 2023 on VoD systems**

NATIONAL PREMIERE TITLES	PREMIERE CO-PRODUCTIONS
Mega Go (5) 01. <i>La Ley de Baltazar</i> (telenovela) 02. <i>Como la Vida Misma</i> (telenovela) 03. <i>Generación 98</i> (telenovela) 04. <i>Hijos del Desierto</i> (telenovela) 05. <i>Juego de Ilusiones</i> (telenovela) Paramount+ (1) 06. <i>Dime con Quién Andas</i> (telenovela) Prime Video (1) 07. <i>Bravura Plateada</i> (miniseries) TVN Play (2) 08. <i>La Sangre del Camaleón</i> (miniseries) 09. <i>Alma Negra</i> (miniseries)	RTVE Play (1) 01. <i>Los Mil Días de Allende</i> (miniseries - Chile, Spain)

Source: Obitel Chile

4. Interactivity and audience participation

The preferred application in terms of interaction with audiences was Instagram and again Mega leads in number of followers, with more than 3 million in both official accounts, while TVN (1.3 million), Chilevision (1.1 million) and Canal 13 (1.4 million).

Mega's consistency in interactivity with its audience is manifested in the fact that these are not isolated actions: they respond to an evident objective that the television audience is linked to the stories, beyond the screen, beyond the broadcasting schedule and in people's daily lives. The design of interactions in other audiovisual content display screens led Mega to be present with content specially created for Instagram, TikTok, YouTube, its own website and its *streaming* platform, MegaGo. In them, it identified the points of contact with its audience, so as to link its products in the daily journey of its audience through the platforms. At these points of contact, it developed initiatives that can be grouped into three types: calls to action from the audience, advertising transmedia and transmedia in social networks.

The first corresponds to actions that appeal directly to the audience, inviting them to take a position on the content, to share it, to watch it on another platform (on MegaGo, for example), or to like it. In this category we can also consider the use of the *#hashtag* in the broadcast of live telenovelas (free-to-air TV, pay TV and live signal on the web), to guide the audience's gaze regarding what happens in the broadcast episode and cause them to stay watching the episode waiting for the announced promise to be fulfilled, through phrases such as *#lavenganzade...*, or *#Baltazarsedeclara...* The *#hashtag* was just used to remind the audience what telenovela they were watching.

This year we see that transmedia advertising was even more present, probably due to the results obtained the previous year. In fact, the brands that advertised were recognized and relevant. This type of media action corresponds to audiovisual advertising pieces whose story takes advantage of the characters, scenarios and even part of the plot of the telenovela to advertise a product. It is not a *placement* in the telenovela, but a separate audiovisual product, and therefore corresponds to a transmedia one.

Regarding the third group of actions, transmedia in social networks, the official accounts of Mega's *telenovelas* on Instagram and TikTok present short videos that include: selections of relevant moments of some chapter of the telenovela; short videos of synchronized dance and music in recognizable scenarios of the telenovela (such as the inmates of El Faro prison in *Juego de ilusiones*); real-life allusions to actions of the characters in the telenovela (for example, dramatization of social rejection in everyday instances that the interpreter of a character who has committed some ethically reprehensible action may suffer); memes; behind the scenes, among many other categories of short videos. The main purposes of this type of content are humorous and the extension of dramatic moments beyond the broadcast. In this sense, Mega's differentiation with respect to user-generated content, also available on social networks, is that it takes advantage of the actors' downtime in production to record short videos in vertical format, mainly humorous (between scenes, waiting in wardrobe or arriving at the studios).



Figure 1: Image of the video interview with one of the protagonists of Mega's Generación 98.



Figure 2: Image of one of the transmedia reels in social networks of Mega's telenovela Juego de Ilusiones, with details of the audience's comments on the character who had died in the story.



Figure 3: Use of social networks for audience calls to action for Mega's telenovela Juego de Ilusiones. The use of the two Instagram accounts of the medial brand stands out: @mega.tv and @teleseries_mega.



Figure 4: Use of social networks to appeal to the audience, through the selection of significant scenes from Mega's telenovela Como la vida misma. Audience interaction is observed on one side, showing an emotional engagement of people with the story (triggered, yes, by the use of emoticons by @mega_tv and @teleseries_mega, which in itself is a call to action or call to action to comment).



Figure 5: Image of an interview of one of the characters of Mega’s telenovelas. Consistency in the format is observed: conversation on a sofa, with the telenovela posters in the background and relaxed atmosphere, with text that calls the audience to action: “What is Alana’s past? Big secrets...”



Figure 6: Image of short video (shorts) published on Mega’s official YouTube account, of trans-media advertising with characters from the telenovela Como la vida misma. The video was originally published on Mega’s official Instagram account.

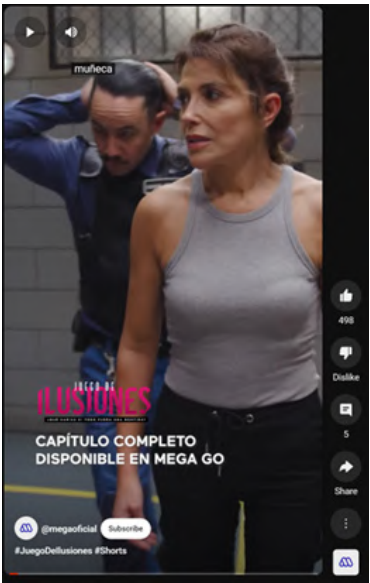


Figure 7: Short video showing a selection of the telenovela Juego de Ilusiones with call to action to access the full chapter on Mega’s streaming platform Mega Go. Example of the station’s cross media strategy.

Source: @megaoficial accounts on YouTube, @mega_tv and @teleseries_mega on Instagram (revised 6/17/2024).

5. Highlights of the year: 50 years of the coup and memory in fiction

September 11, 2023, marked the 50th anniversary of the coup d’état in Chile. The Chilean media began covering this milestone long before the anniversary, both nationally and in the audiovisual arena, with documentaries, series and films. However, while the media in Chile focused on connecting the commemoration of the 50th anniversary of the coup d’état with current news events, avoiding delving into wounds and issues of the past that remain in the collective memory, fictions explored in detail various historical facts, especially two new fictions aired in 2023 on the subject: *Los Mil Días de Allende* and *La Sangre del Camaleón*.

In recent years, fiction (television series in this case) has stood out for contributing to programming with the dramatization of the country’s history, joining real

events and characters that boosted the construction of television narratives (Mateos-Pérez & Ochoa, 2018). These types of productions connect emotionally with viewers and illustrate events in a dynamic and captivating way, complementing other formats that address such events and leaving images that, over time, become part of more complex discourses (Antezana, 2015). Fiction, consequently, has facilitated learning, reflection and understanding “of the social constructions made by collective communities” (Chamorro, 2014, p. 145), questioning those representations considered rational and objective (Baer, 1999).

The four-episode miniseries, *La Sangre del Camaleón*, is inspired by the book *Camaleón: Doble Vida de un Agente Comunista*, by Javier Rebolledo. The series loosely adapts the book, presenting Mario Lara, a successful businessman who owns a chain of appliance stores and has relationships with high-ranking members of the Pinochet regime while, at the same time, he is a communist militant who uses his privileged position to support the armed resistance against the dictatorship. The miniseries *Los Mil Días de Allende* follows the life of Chilean President Salvador Allende from the time he took office on September 4, 1970, until his death on September 11, 1973.

Los Mil Días de Allende begins with the problems Allende faced in assuming the presidency as he was not directly elected, but only the candidate with a narrow first majority.²² The series shows the campaign of terror carried out by the extreme right, including the assassination of General René Schneider, which culminates with the Congress proclaiming Allende as president of Chile. It also delves into the various measures Allende implemented, such as the nationalization of copper, and historical events during his government, such as the visit of Fidel Castro, the constitutional accusation filed against the Minister of the Interior, José Tohá, the truckers’ strike in October 1972 and Allende’s last speech before his death.

La Sangre del Camaleón highlights significant episodes that occurred during the dictatorship: a failed arms shipment from Cuba in 1986 for the armed wing of the Communist Party; contextual situations of the everyday life of the dictatorship: curfew, surveillance, intimidation, torture and political assassinations, financial scandals, corruption, manipulation of the press, among others, as well as the representation of some sinister characters related to the regime’s security apparatus. Through archive images, two emblematic moments are shown: the failed attempt against Pinochet and the visit of Pope John Paul II. Thus, fiction in Chile delves into the history of dictatorship and democracy, contributing to the collective memory in a year of particular historical and social relevance.

²² He obtained 36.2% against 34.9% for the second and 27.8% for the third. Current legislation indicated that it was up to the congress to decide in the absence of an absolute majority.

6. Theme of the year: New melodramatic narratives in the Chilean soap opera

The Chilean telenovela has experienced changes in its narrative in the last year, particularly in what Mega has programmed in the 8 p.m. time slot. Although the classic anchor to the traditional melodrama is still present as the predominant matrix in Chilean productions, a review of the content proposal of the last telenovelas premiered in 2023 by that channel, shows that this type of content seems to be in a process of transformation. The approach of these productions, and its successor in 2024 (*Al Sur del Corazón*) emerges as a space for experimentation and evolution, where stories are developed in plots that do not necessarily require great antagonists to keep the audience's interest, reflecting a more complex and diverse society. The elimination of stereotypes, the use and disuse of certain narrative resources and the innovative handling of time and emerging themes presented in the 20-hour telenovela are indicators of an industry in constant evolution, which seeks to resonate with the experiences and emotions of its audience.

6.1 Blurring of the antagonist

One of the most interesting changes in the narrative of recent Chilean telenovelas at 8 p.m. is the blurring of traditional stereotypes of the telenovela anchored in melodrama. We find productions in which the driving force of the action, the antagonist, understood as a villain who opposes the achievement of the protagonists' goals, seems to have disappeared or at least blurred.

While in productions that follow a classic archetypal melodramatic matrix, the antagonist is still presented in a clear and concrete figure, as in *Juego de Ilusiones* (3 pm) or in the nightly productions *Hijos del Desierto* and *Generación 98* (both aired after 10 pm), in the afternoon telenovela *Como la Vida Misma* -as well as in the recently premiered *Al Sur del Corazón*- this changes radically: conflicts and obstacles arise from life's own circumstances, eliminating the villain per se, which increases the verisimilitude of the stories while posing important narrative challenges.

This trend was glimpsed in the telenovela *La Ley de Baltazar*, which finished airing at the beginning of May 2023, and which told the story of a widowed, friendly and outgoing man, owner of a ranch in southern Chile who, after suffering a heart attack, must face the decisions of his children, with whom he does not have the best relationship. In this production, along with the rebirth of a love story from his youth, the protagonist must particularly confront one of his sons, who feels deep resentment towards him for forcing him to deny his homosexuality. Although this character -along with two others- plays the role of antagonist until the end, the development of the plot presents nuances that partially blur the archetype, although it is still closer to a traditional melodramatic narrative.

The fundamental change appears in *Como la Vida Misma*, which, from its title, sets out a proposal that shows that the life of a middle-class family can put the characters

in multiple situations that stress them, but not necessarily in a negative way. With the hook of two protagonists close to fifty, attractive, divorced, with children, who meet through a dating app, this telenovela has been extended for more than 250 episodes. The main characters got married in episode 42 and that event, which traditionally marks the end of a traditional romantic story, only becomes one more event in their lives that gives rise to new obstacles that they must face every day.

When talking about obstacles, it is not that the characters face implausible situations that constantly put their happiness in suspense, nor that, in turn, they do not experience periods of stability. On the contrary, the careful script work evidences an effort to present the audience with plausible events that become the driving force of the action. The villains are not part of the plot itself, they do not have a specific name and surname, but the protagonists themselves -both the main characters and the outstanding range of supporting roles- have so many nuances that, despite being all “good” subjects in the traditional sense (with good intentions, with no desire to harm others), they perform actions that become the driving force of the action. Even characters that in the first episodes seemed to play such a role (the ex-husband and ex-wife of the respective protagonists), as time goes by, rebuild their relationships and become agents of support for their previous counterparts.

Thus, the goal of the plot disappears. There is no great obstacle to overcome or ultimate goal to reach, but rather -if desired- the story could continue indefinitely. This also allows for a more realistic melodramatic construction and characters that evolve with more depth, with greater nuances and more complex dilemmas, moving away from classic clichés such as the buffoon. The characters are no longer simply good or bad but have virtues and flaws that reflect human complexity. This evolution allows for a recovery of links with classic melodramas and other genres, incorporating elements from foreign comedies, such as American ones, to enrich the narratives.

This also means a loss of protagonism of the nuclear romantic story. With the disappearance of the great goal of “being together” as the ultimate goal of the narrative, the romantic love of a single couple as the main thread of the telenovela also disappears. However, the way in which the story is structured does not make this a deficiency, as it extends the focus of the narrative to a series of very interesting secondary stories. Without being a choral story, adolescent love, love in old age, love between people of the same sex emerge as diverse manifestations that become relevant at different moments of the story.

Sustaining a melodrama without a clear antagonist for more than 250 episodes is a challenge, but also an innovation. The modern narrative of Chilean telenovelas, as seen in *Como la Vida Misma*, is based on the premise that life’s natural obstacles are enough to move the story along. This allows for a continuous exploration of the characters and their lives, avoiding the need to conclude the plot abruptly, which affects the temporality of the story and the themes that are developed.

6.2 Emerging themes and temporality

The inclusion of diverse relationships, such as gay couples, marks a milestone in Chilean narratives, which in 2023 has reached a stage of maturity. From appearing as secondary characters, often in roles close to the archetype of the buffoon, or without visible romantic interests on screen, last year homosexual relationships appeared on the open screen as a core part of the plot. *La Ley del Baltazar* presents the story of “Mariano”, a man who has had to hide his homosexuality due to his family’s rejection, who married a woman and had a child and lives a double life. This is a character who, from a more tragic approach, must face the death, due to a car accident, of the man who had been his secret partner for five years. The plot highlights the still existing rejection of homosexuality in certain sectors of Chilean society, the fear, denial and difficulties to publicly recognize sexual orientation, as well as the process of personal and family acceptance that culminates with the end of this character and his new partner.

Como la Vida Misma takes the storyline of “Joselo” and “Thiago” a step further in the process of narrating the stories of same-sex characters. Joselo, the protagonist’s son, is a young university student, responsible, a good brother, a model son, who at the beginning of the telenovela develops a relationship with a foreign exchange student. As the chapters go by, he discovers feelings for a university classmate, Thiago, and the story turns towards a process of self-discovery and recognition on the part of the character. Probably a novelty of the development of this story is the naturalness with which it is inserted into the plot. The relationship between the characters is presented in such a way that their emotions and difficulties are the most important, relegating sexual orientation to the background. This approach allows the love stories to be universal and accessible to all viewers.

Another emerging theme to highlight is the incorporation of stories about love in old age and the difficulties inherent to this stage. The protagonist of *La Ley de Baltazar* was a man of retirement age (in Chile, around 65 years old), who feels young and with a great desire to live and, after suffering a heart attack, decides to recover a youthful love.

Como la Vida Misma, on the other hand, tells the story of “Malú” and “Armando” -the protagonist’s mother and the father of the protagonist’s ex-husband, respectively- who fall in love, move in together and consolidate as a strong, stable and happy couple. However, they must face Armando’s Alzheimer’s as an obstacle that, while separating them, because he gradually forgets her, strengthens them and demonstrates the strength and fortitude involved in facing such a situation. Although the theme of Alzheimer’s is not new in Chilean telenovelas (*Matriarcas* and *Casa de Muñecos*), it emerges again as an obstacle in life that hinders but does not destroy a love story.

Bullying on social networks, the leaking of compromising images, and other risks that teenagers face today also appear as important elements of the narrative, which are intertwined with more classic obstacles, such as the parents' rejection of the romantic interest of one of the protagonist's daughters or her pregnancy.

The treatment of time in telenovelas, as a narrative resource, has allowed the development of these themes. The stories now approach time in a more flexible way, allowing important events, such as the aforementioned teenage pregnancy or the progression of Alzheimer's disease, to develop with greater depth and nuance. This enriches the narrative and allows for a more multidimensional exploration of themes, which are addressed with unprecedented depth. In this way, a day in fiction can translate into a week's worth of chapters, just over 30 minutes long. While this may give the audience the feeling that much more time has passed between one event and the next, it gives the scriptwriters the possibility of developing more elaborate dialogues and making the characters more complex, enriching the story.

Chilean telenovelas have also returned, after many years, to using the geographical and social landscape in a more integrated way. Productions such as *La Ley de Baltazar* (and now, *Al Sur del Corazón*) and some predecessors such as *Isla Paraíso*, are set in specific places in Chile, building a reality that is both idealized and representative. This not only benefits the narrative, but also the locations represented, creating a stronger bond with the audience. The exteriors recover their strength and provide the story with an audiovisual element deeply valued by the audience.

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COLOMBIA: IN SEARCH OF A NARRATIVE BETWEEN MELODRAMA, BIOGRAPHIES, REPRISES AND VIOLENCE.

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Authors:

Borys Bustamante Bohórquez: <https://orcid.org/0000-0001-7986-1441>

Fernando Aranguren Díaz: <https://orcid.org/0000-0001-5565-4536>

Hernán Javier Riveros Solórzano: <https://orcid.org/0000-0002-1185-7603>

Team:

Diana María Lozano Prat, María Teresa Garzón Carreño, Diego Alejandro Rodríguez Wilches, Jean Paul Camilo Dávila Sierra, José David Cortés Triana, Ingrid Katerin Franco León, Jeraldin Peña, Jheraldin Murcia.

Introduction

The year 2023 marked a turbulent year for Colombia in terms of public order and a year in which political polarization deepened. The arrival to power for the first time of a progressive government led to the hardening of positions in favor and against the ruler and, in parallel to the first approval of the health reform in the House of Representatives, great expectations were also generated around the regional elections (governors and mayors) of the year. In these elections, opposition parties and parties that distanced themselves from the government party won in the main cities, including Bogotá, Medellín and Barranquilla, which became a factor of analysis that played a leading role in public opinion debates. In this way, 2023 was a year in which, in terms of television, news programs were the protagonists, both with the 3 daily hours of the noon newscast and with the presence of constant news bulletins referring to the elections as well as an unprecedented follow-up to any possible scandal affecting the government, so that the news programs monopolized the agenda of the small screen together with reality shows that continued their trend of dominance in the nation's rating.

In the case of television fiction, the year was characterized by a process of searching for a narrative that could connect with audiences and recover the great ratings in open signal of previous years. However, in view of the growing presence of streaming platforms and the increasingly deeper relationships between national production companies and these systems, an interesting phenomenon occurred: the most watched fictions also became those that occupied the top 10 on Netflix, Amazon or Vix, which became the strategic allies of the large private national television channels. Thus, fiction was presented in a heterogeneous way, mixing reprises, which

continued to mark important audience ratings, continuations of past fictions, as is the case of *Pasión de Gavilanes*, *La Dinastía Indomable*, the proliferation of biographical series such as *Rigo*, *Leandro Díaz* and *Los Medallistas* and the return of melodrama and telenovela, being *Ana de Nadie* the most watched of the year along with two Mexican productions that starred in the ratings of the afternoon slot previously conquered by Turkish productions. Consequently, more than a uniform narrative, what was seen on screen showed the heterogeneity that reflected the condition of the search for a story, which could be a sign of the condition of a nation in a process of change and in permanent tension at a social and political level.

1. The audiovisual context of Colombia in 2023

1.1. La televisión abierta en Colombia

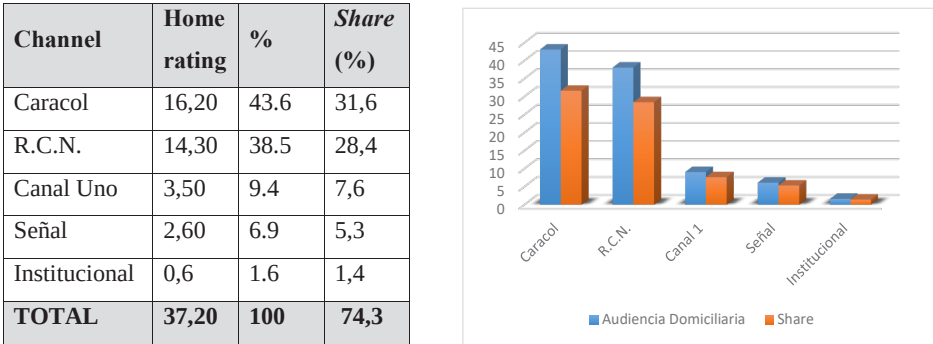
Table 1. National open television channels in Colombia

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

Source: Obitel Colombia

In Colombia, the dominant trend of private channels over public channels at the national level continues. Thus, Caracol and RCN continue to be the two main channels among audience preferences, and although the audience of the private channel Canal Uno and the public channel Señal Colombia has increased slightly, they still show an incipient consumption rate. However, 2023 marked the resurgence of RCN’s prominence, which rebounded in audience, and although it did not dethrone Caracol as the most tuned channel, it did manage to position, at least in terms of fiction, the most watched telenovela and its productions had a greater repercussion at media level in relation to previous years. Finally, given the preponderance of national events, it should be noted that, although fiction played an important role in the national rating, it was the informative and sports programs and especially the reality shows that had the highest audience ratings.

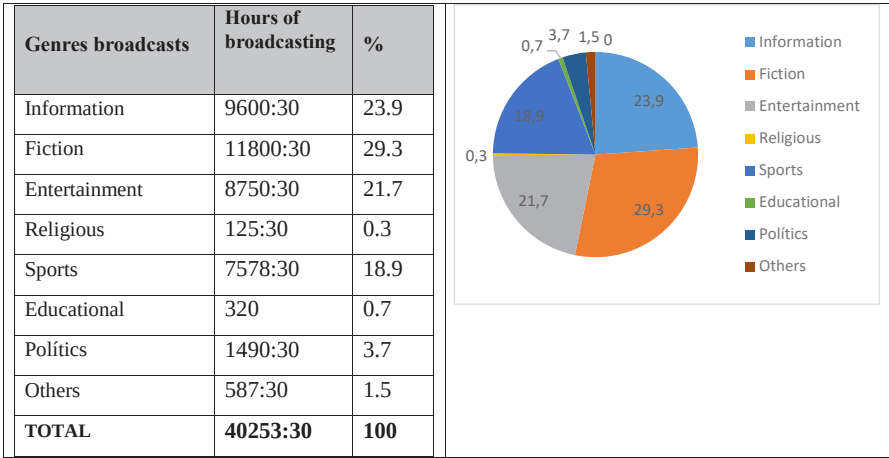
Chart 1. TV share and rating by channel



Source: Kantar Ibope Colombia - Obitel Colombia

In terms of audience, Caracol is once again the dominant channel. However, RCN has managed to gain ground mainly through fiction and the positioning of its productions in this aspect. On the other hand, the strong presence of reality shows, news programs (with emphasis on electoral issues) and sports events (mainly cycling and soccer) contributed to Caracol’s leading role, whose sports broadcasts and news programs remain in first place in terms of audience. Finally, in the case of Canal Uno and the public channels, their ratings continue to be low.

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



Source: Kantar Ibope Colombia - Obitel Colombia

In terms of genres and hours, the greatest amount of screen time corresponded to fiction, both premieres and reprises, being protagonists in the afternoon, Prime Time (a space shared with Reality Shows and newscasts) and nighttime slots. In second place, news programs were found, given that news programs in Colombia have 4 daily broadcasts, two of which correspond to a space of approximately 3

hours, as well as the constant broadcasting of bulletins during the electoral period and in events such as that of the missing indigenous children in the Amazon. Next comes entertainment, headed by reality shows and humor programs such as Caracol Televisión’s traditional *Sábados Felices*. Next came sports programming, particularly dedicated to cycling and soccer as the main protagonists of these programs.

1.2. Pay TV and VOD platforms in Colombia in 2023

According to the Communications Regulation Commission (CRC) in Colombia, subscription television reached a presence of 35.4 households per 100. In addition, it is noted that the number of subscribers has presented a reduction of 0.5% with 6.3 million as of June 2023, compared to June 2022; therefore, a decreasing reception in households is evidenced in the first semester of 2023, taking into account the increase of new households. According to Data Flash (CRC, 2024), by this date, the revenues associated to the subscription television service reached 443 million dollars, evidencing an economic growth of 0.3% compared to the same semester of 2022.

For the first half of 2023, 43.3% of the revenues associated with subscription television service, concerned CLARO, 24.1% to DIRECTV, 17.2% to UNE-EPM, 9.6% to MOVISTAR, 2.0% to ETB, 1.7% to HV TELEVISIÓN, and the remaining 2.8% is contributed by the other operators. It should also be noted that, in the case of cable operators, they also included with subscription services the possibility of affiliating to platforms such as Netflix, Prime Video as part of the package that could be contracted, given the growing interest of users in the country.

Table 2. Pay TV Networks in Colombia

The ten most viewed pay TV channels in Colombia		
Channel	Genre	Origin
ESPN	Sports	USA
WIN sports	Sports	Colombia
Fox Sports 2	Sports	USA
TNT	Fiction	USA
HBO	Fiction	USA
Star Channel	Fiction	USA
AXN	Fiction	USA
Disney Channel	Kids	USA
Cartoon Network	Kids	USA
CNN en Español	Information	USA

Source: Obitel Colombia

In relation to VoD platforms in Colombia in 2023, there will be approximately 28 streaming services. Among the most popular are Netflix (22%), Prime Video (20%), Disney+ (17%), HBOMax, now Max (14%), Star+ (10%), Paramount+ (7%), Apple TV+ (3%), Claro Video (2%) and others (5%). Regarding consumption in general, it is found that 36% of Colombian households have a subscription to some Streaming platform. Netflix with 22% is undoubtedly in the first place of the most watched platforms, due, among others, to the fact that it presents greater economic flexibility and advertising for its acquisition, even allowing the use of several screens with a single profile. In terms of fiction consumption, it should be noted that the productions that were premiered on open signal were also quickly released on platforms, so that there was a kind of redundancy in which, curiously, in cases such as *Rigo*, this production was both in the first places of the rating and in the 10 most watched on the platform on which it was released, in that case, Amazon Prime.

In addition, in Colombia there are platforms belonging to national channels that play an important role and also showcase national production. This is the case of Caracol Play, which offers great flexibility to access its content and allows watching old telenovelas, exclusive web series and other content that are not broadcast on the open signal and that are combined with the programs that are broadcast in the regular programming, being a pay system. On the other hand, RCN does not have a platform as such, but uploads its contents to the channel's website to be watched free of charge, although it does not have such a wide offer as Caracol Play. Finally, RTVC Play, linked to the public media system, is a free alternative, providing a wider space for national and educational programming, as well as different contents and innovative proposals of transmedia type, which can be accessed with the same mechanisms of a pay platform.

1.3 Funding sources of the audiovisual sector

The Ministry of Information Technology and Communications (Min Tic), which seeks to promote, strengthen and help the audiovisual industry, generates several calls seeking this purpose. These calls are "Stories of Change" with an allocation of more than 1 million dollars that will be distributed in 300 audiovisual contents, "Youth that transform" with a budget of 670 thousand dollars that will benefit young people in prioritized areas, and the call "Stories in Series" with incentives to 10 creative industries with 54 thousand dollars.

It is worth mentioning the most ambitious call of the ICT Ministry for 2023 "Abre cámara" (Open camera), which granted 6.4 million dollars to 92 Colombian audiovisual productions, including different animated series, fiction and documentaries with original and innovative stories that will be broadcast on Canal Capital, Canal Trece and other regional channels. The call was organized in 6 categories, which

included audiovisual production companies with resources in excess of US\$3.8 million, micro, small or medium-sized regional audiovisual production companies with resources of US\$1.5 million, Indigenous communities with US\$275 thousand, Black, Afro-descendant, Raizal and Palenquero communities and Rom communities with resources of US\$275 thousand, non-profit television service operators with resources of US\$177 thousand, and community television service operators (peace issues) with US\$172 thousand.

On the other hand, Law 814 of 2003, Law for the Promotion of Cinematographic Activity in Colombia, gives rise to the Film Development Fund (FDC) account and its resources come from a parafiscal contribution, the Film Development Quota, paid by exhibitors, distributors and film producers. For 2023 this FDC offered US\$5.2 million in incentives per competition distributed in 10 categories: fiction, animation, documentary, training, regional and ethnic, circulation, children's short films, preservation of memory, research and minority co-productions.

1.4 Communication policies

Decree 1633 of 2023, issued by the Colombian Ministry of Information Technologies and Communications, regulated the conditions that will facilitate the participation of groups with a differential approach in both public television and community radio. This decree also regulated the process by which such groups may have access to the equipment confiscated by the National Spectrum Agency (ANE).

In relation to the incentives for the year 2023, it should be noted that, through six different programs, a total of 40,000 million Colombian pesos were added to promote proposals from the territories that expose the country as a World Power of Life. Among the most outstanding incentives was the “Abre Cámara” (Open Chamber) program, which financed audiovisual proposals of public and cultural interest. In the same vein, a call was opened to strengthen inclusion in public television, aimed at regional public operators, which received an incentive of 3,500 million Colombian pesos for the creation of 51 inclusive contents.

Another incentive that stood out was “Territorios al Aire”, a call addressed to all community broadcasters in the country, whose purpose was to finance up to 100 sound contents, with a total of 2,942 million Colombian pesos, as well as to provide training through the Ministry of Cultures, Arts and Knowledge. In short, both Decree 1633 and the incentives proposed by the Colombian Ministry of Information Technologies and Communications sought greater participation from the regions, broadening participation and democratizing access to state resources.

1.5 Digital and mobile connectivity infrastructure.

During 2023, the Ministry of Information Technologies and Communications of Colombia, together with the broadcast television operators, designed the National Survey of Open Television in Digital and Analog Technology (2023), which had as purpose, to determine the degree of knowledge, appropriation and use of the broadcast open television signal in digital and analog technology in the 32 departments of the country. This survey included the entire national territory, so that from October 13 to November 13, 2023, a structured questionnaire was applied to 14,005 adults, regardless of gender or socioeconomic status. According to the results of the survey, it is possible to conclude that about 95% of respondents are aware of Digital Terrestrial Television, also allowed to determine that, if the Analog Cessation of Broadcasting is executed, 84% of households would have access to open television.

Regarding digital and mobile connectivity infrastructure, during 2023, after an auction process, 5G technologies entered Colombia, which will be operated by the following companies: Claro, Wom, Movistar, Tigo and Telecall, the latter being based in Brazil, will start operating by the end of 2024; it should be noted that, given the Obligations to Do, these operators will have to supply the connectivity needs of 1. 191 schools in the country, and they must also expand 4G coverage in 34 primary and secondary roads in the country, which in exact terms means 700 kilometers of connectivity. Also noteworthy is the alliance between the MinTic and Internexa, a wholesale fiber optic operator that brought internet to 384,000 homes in strata 1, 2 and 3 in 36 municipalities in the country with an investment of 270,588 million Colombian pesos. Similarly, the “Connectivity Communities” program trained around 1,819 people in 31 of Colombia’s 32 departments.

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

Table 1. Premiere fictions exhibited in 2023

UNRELEASED NATIONAL TITLES – 7 Canal Caracol - 3 1. <i>Romina Poderosa</i> (Serie) 2. <i>Ventino: El Precio de la Gloria</i> (Serie) 3. <i>Los Medallistas</i> (Serie) Canal RCN – 4 4. <i>Leandro Díaz</i> (Serie) 5. <i>Ana de Nadie</i> (Telenovela) 6. <i>Rigo</i> (Serie) 7. <i>Tía Alison</i> (Telenovela)	COPRODUCTIONS – 1 1. <i>Pasión de Gavilanes. La Dinastía Indomable.</i> (Serie) UNRELEASED FOREIGN TITLES – 3 Canal Caracol – 3 1. <i>El Amor Invencible</i> (Telenovela-México) 2. <i>La Madrastra</i> (Serie – México) 3. <i>Cabo</i> (Telenovela – México) TOTAL UNREALEASED TITTLES: 11

Source: Obitel Colombia

TABLE 1b. Reruns Exhibition in 2023

NATIONAL RERUNS – 7 Canal Caracol – 3 1. <i>Escobar, el Patrón del Mal</i> (Serie) 2. <i>La Gloria de Lucho</i> (Serie) 3. <i>Los Briceño</i> (Serie) Canal RCN – 4 4. <i>A Corazón Abierto</i> (Telenovela) 5. <i>Lady, la Vendedora de Rosas</i> (Telenovela) 6. <i>La Ley del Corazón</i> (Telenovela) 7. <i>Correo de Inocentes</i> (Serie)	FOREIGN RERUNS – 1 Canal RCN – 1 1. <i>La Rosa De Guadalupe</i> (Serie, México) TOTAL RERUNS: 8

Source: Obitel Colombia

In 2024, only 7 national original productions were presented, with a greater number of reprinted titles, thus maintaining the tendency to continue with reprises as an important presence on television.

Table 2 Formats of national premiere fiction in 2023 and its evolution in the five-year period..

Formats	Títulos						Hours					
	2019	2020	2021	2022	2023	TOTAL	2019	2020	2021	2022	2023	TOTAL
Telenovela	4	4	7	2	4	20	270:00	270:00	472:30	54:30	248:50	1067:50
Series	7	4	2	5	7	26	472:30	270:00	202:30	260:30	315:40	1521:10
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
Unitario	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
Otros	0	0	0	0	0	0	0:00	0:00	0:00	0:00	0:00	0:00
TOTAL	11	8	9	7	11	46	742:30	540:00	675:00	315:00	564:30	2589:00

Source: Kantar IBOPE Colombia - OBITEL Colombia

In terms of formats, it is interesting that although the preponderance of series continues, the telenovela once again has an important position, both in the most watched fiction, *Ana de Nadie*, and in the productions that achieved the highest audience in the afternoon slot.

Table 3. Premiere fiction exhibited in 2023: countries of origin

Country	Tittles	%	Hours	%
NATIONAL (total)	7	63,63	358:30	63,51
OBITEL COUNTRIES (total)	3	27,27	153:20	27,22
Argentina	0	0,0	0:00	0,0
Brasil	0	0,0	0:00	0,0
Chile	0	0,0	0:00	0,0
Colombia	7	63,63	358:30	63,51
Ecuador	0	0,0	0:00	0,0
España	0	0,0	0:00	0,0
EE.UU. Hispano	0	0,0	0:00	0,0
México	3	27,27	153:20	27,22
Portugal	0	0,0	0:00	0,0
Uruguay	0	0,0	0:00	0,0
Venezuela	0	0,0	0:00	0,0
COPRODUCTIONS (Totales)	1	9,1	52:40	9,27
Nacional Coproductions	0	0,0	0:00	0,0
Obitel Countries Coproductions	1	0,0	52:40	9,27
TOTAL	11	100,0	564:30	100,0

Source: Kantar IBOPE Colombia - OBITEL Colombia

At the national level, the year presented a greater preponderance of national production, as is customary. However, the entry, even in terms of being the most watched productions, of telenovelas originating in Mexico stands out, as well as the importance of co-production in terms of the national premiere offer.

Table 4. Formats of national and Latin American fiction exhibited in 2023

Format	Titles				Hours			
	Nationals	%	Obitel	%	Nationals	%	Obitel	%
Telenovela	2	28,58	2	50%	140:30	39,11	108:20	52,75
Serie	5	71,42	2	50%	218:00	60,89	97:40	47,25
Miniserie	0	0,0	0	0,0	0:00	0,0	0:00	0,0
Telefilm	0	0,0	0	0,0	0:00	0,0	0:00	0,0
Unitario	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
Otros	0	0,0	0	0,0	0:00	0,0	0:00	0,0
Total	7	100,0	4	100,0	358:30	100,0	206:00	100,0

Source: Kantar IBOPE Colombia - OBITEL Colombia

In terms of formats, the dominant trend of series is again evident, although the way in which telenovelas manage to cover almost 30% of the titles stands out. Therefore, it is possible to make visible the condition of tension between formats that characterizes national production, in which, although there seems to be an inclination towards series, it should be noted that there is a certain narrative ambiguity between the structural condition of the series story and the close relationship with the narrative conditions of the telenovela.

TABLE 5: 10 Most watched titles in 2023

Title		Channel	Producer	Format / genre	No. de cap/ep in 2023	Time Zone	Rating	Share
1	Ana de Nadie *	RCN	RCN (COL)	Telenovela/Drama	93	Prime Time	9,41	22,33
2	Pasión de Gavilanes. La Dinastía Indomable	Caracol	Telemundo (USA) / CMO (COL)	Serie / Drama	72	Prime Time	9,18	21,34
3	Rigo*	RCN	RCN (COL)	Serie / Biográfico	50	Prime Time	8,55	18,45
4	Romina Poderosa *	Caracol	Caracol (COL)	Serie / Drama	65	Prime Time	7,87	15,43
5	Leandro Díaz *	RCN	RCN (COL)	Serie / Biográfico	19**	Prime Time	6,95	12,57
6	Tía Alison *	RCN	RCN (COL)	Telenovela / Drama	63	Prime Time	6,41	12,46
7	Ventino; El Precio de la Gloria *	Caracol	Caracol (COL)	Serie / Biográfico	60	Prime Time	4,92	8,62
8	Cabo	Caracol	Televisa (MX)	Telenovela / Drama	85	Tarde	4,35	8,49
9	Los Medallistas *	Caracol	Caracol (COL)	Serie / Biográfico	64	Prime Time	4,08	8,35
10	El Amor Invencible	Caracol	Televisa (MX)	Telenovela / Drama	60	Tarde	4,05	8,16
Total of national productions: 7				Original foreign scripts: 3				
70%				30%				

Source: Kantar IBOPE Colombia – OBITEL Colombia

(*): National production, (**): Starts in 2022 and continue in 2023.

In the case of the most watched titles, the way in which telenovela and RCN once again take the first place in the case of the most watched fiction stands out. Ana de Nadie, in this sense, evidences an interesting condition of the nation's narratives, which refers to a growing inclination to the melodrama scheme and the conditions that led the telenovela to be the protagonist for decades in national production. Added to this is the higher presence of productions of this channel rivaling the first places of audience. However, it is necessary to highlight that, although they are not in the top, because they do not correspond to premieres, the importance of 3 reprises that surpassed the last places in the ranking cannot be discarded: *Los Briceño* 7.14; *A Corazón Abierto* 5.03 and *Escobar el Patrón del Mal* 4.98 and, likewise, the case of the Turkish fiction *Yusuf*, which scored 5.07.

TABLE 5a: 10 Most watched national titles in 2023

Title		Channel	Producer	Format /genre	No. de cap/ep (en 2023)	Time Zone	Rating	Share
1	Ana de Nadie	RCN	RCN (COL)	Telenovela/Drama	93	Prime Time	9,41	22,33
2	Pasión de Gavilanes. La Dinastía Indomable	Caracol	Telemundo (USA) / CMO (COL)	Serie / Drama	72	Prime Time	9,18	21,34
3	Rigo	RCN	RCN (COL)	Serie / Biográfico	50	Prime Time	8,55	18,45
4	Romina Poderosa	Caracol	Caracol (COL)	Serie / Drama	65	Prime Time	7,87	15,43
5	Leandro Díaz	RCN	RCN (COL)	Serie / Biográfico	19*	Prime Time	6,95	12,57
6	Tía Alison	RCN	RCN (COL)	Serie / Drama	63	Prime Time	6,41	12,46
7	Ventino: El Precio de la Gloria	Caracol	Caracol (COL)	Serie / Biográfico	60	Prime Time	4,92	8,62
8	Los Medallistas	Caracol	Caracol (COL)	Serie / Biográfico	64	Prime Time	4,08	8,35
Total of national productions: 7				Original foreign scripts: 1				

Source: Kantar IBOPE Colombia – OBITEL Colombia

(*): Starts in 2022 and continue in 2023.

In the case of national production, including a co-production, the way in which dramas and biographies become the fundamental genres on screen stands out. This is directly related to the transformations of narratives in terms of a constant search for new cultural matrices that emerge in the light of a changing society and that is counted between the small screen and the multiple screens of digital platforms, since 60% of these titles also circulated through streaming services being equally protagonists at the audience level.

TABLE 6: 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	Ana de Nadie	RCN	54	46	30	30	25	15
2	Pasión de Gavilanes. La Dinastía Indomable	Caracol	56	44	35	30	25	10
3	Rigo	RCN	50	50	30	30	20	20
4	Romina Poderosa	Caracol	56	44	52	28	11	9
5	Leandro Díaz	RCN	52	48	30	25	25	20
6	Tía Alison	RCN	80	20	50	25	15	10
7	Ventino: El Precio de la Gloria	Caracol	62	38	56	25	14	5
8	Cabo	Caracol	85	15	35	25	25	15
9	Los Medallistas	Caracol	70	30	55	28	13	4
10	El Amor Invencible	Caracol	85	15	35	30	25	10

Title		Channel	Age (%)					
			04 - 12	13-17	18-24	25-34	35-49	50-64
1	Ana de Nadie	RCN	2	5	14	25	34	20
2	Pasión de Gavilanes. La Dinastía Indomable	Caracol	2	3	5	18	36	36
3	Rigo	RCN	10	10	20	20	20	20
4	Romina Poderosa	Caracol	2	4	18	31	28	17
5	Leandro Díaz	RCN	2	3	5	28	33	29
6	Tía Alison	RCN	1	2	3	26	37	32
7	Ventino: El Precio de la Gloria	Caracol	1	2	4	16	45	32
8	Cabo	Caracol	1	3	3	18	30	45

Source: Kantar IBOPE Colombia - OBITEL Colombia

In terms of socioeconomic status, it is interesting to find a fundamental issue that is linked to the clear differentiation between the Prime Time slot and the one corresponding to the afternoon, where it is fundamental that, given the heterogeneity of the first case, highlighting the almost uniform audience of *Rigo*, it contrasts with the homogeneity of the second corresponding to the fictions *Cabo* and *El Amor Invencible*, where the majority of the female representation is between 50 and 70 years old, which is directly related to the positioning of the telenovela format and the melodramatic structure close to the 80s and 90s, as it happened at the time with Turkish fictions and the structuring of their narratives.

3. VoD 2023 Monitoring

3.1 VoD platforms market in 2023

In 2023, the VoD platform market presented an expanding panorama with a total of approximately 28 platforms, including offers linked to national public or private channels, the most important being Caracol Play and RTVC Play, complemented by cable operators' systems, as is the case of Claro Video, the large platforms with the largest market share, with Netflix, Prime Video and Disney + being the main ones, as well as the presence of other players such as HBOMax, nowadays Max, Star+, Paramount+, Vix, Apple+ and offers focused on more specific audiences such as Crunchyroll, dedicated to anime, Digitalia Film Library, specialized in independent films or Win+ dedicated to sports. This panorama also highlights a production logic in which the existing agreements between private channels and streaming services are evident, which allows a fiction to be seen in several services and has allowed the production of exclusive productions for VoD services and at the same time the possibility of having a short period of time with premieres in open signal and on platforms, which has expanded the scope of national production and facilitated the realization of co-productions, as was the case of *Pasión de Gavilanes. La Dinastía Indomable*.

3.2 Local VoD platform offer in 2023 (national, regional within the country)

The offer of VoD platforms in the country has been on a constant upward trend, in which although the privilege of having the largest number of subscribers is maintained mainly by Netflix and Amazon Prime, the number of platforms has been multiplying exponentially, including specialized content dedicated to both traditional fiction (film and television) and anime, with specialized audience segmentations. This preponderant role of VoD in the country has led to the generation of different distribution agreements mainly between private channels and streaming services, so that productions that appear on the small screen are also broadcast on Netflix, Prime Video and more recently Vix. In addition to this panorama, there are VoD systems such as Caracol Play and the constant struggle of RTVC Play as a public media system that offers free content with an emphasis on cultural themes, as well as making room for narrative experimentation and the use of new technologies in production. In terms of consumption, in Colombia, as indicated above, Netflix is the dominant service with 22% of streaming market share, compared to 20% by Prime Video.

3.3. VoD analysis in 2023: national premiere fiction and coproductions

In the national production of fiction content, there is evidence of a growth in the presence of productions on the platforms both in the case of reprises and premieres. In this sense, it is observed that there is an increase in the publication of audiovisual contents on streaming platforms after their premiere on open signal, almost always within a few days of each other. This has allowed that, as in the case of national channels, in the case of streaming there is a notorious presence of premieres and reruns in the top 10 most watched week after week, with fictions such as *Pasión de Gavilanes*, *Yo Soy Betty, la Fea*, in the case of reruns, and *Pasión de Gavilanes*. *La Dinastía Indomable* (co-production), *Ana de Nadie*, *Rigo* and *Romina Poderosa*, in the case of premieres.

In this panorama, fictions destined exclusively for streaming services were also premiered, as is the case of *La Primera Vez*, *La Influencer*, *Pálpito II*, *Manes* and *El Club de los Graves*, which shows a marked interest in the production of content for these digital spaces. In this space, RTVC Play, from the Colombian public media system, stands out again, continuing with its narrative experimentation and approach to new formats, this time mixing fiction with interactive experiences in the series *Gestas del Tiempo III*, thus becoming a pioneering scenario in terms of the search for new ways of narrating and constructing fictions. Finally, the collaboration between national channels and platform distribution systems has allowed several fictions to be consumed in different digital platforms, which generates the provision of a certain convergence between media around contents produced at a fictional level.

**TABLA 7. National fiction and co-productions screened
in 2023 on VoD systems**

PREMIERE NATIONAL TITLES	COPRODUCTIONS
Netflix – N° national titles 5 1. <i>Romina Poderosa</i> (serie) 2. <i>Palpito II</i> (serie) 3. <i>La Primera Vez</i> (serie) 4. <i>La Influencer</i> (serie) 5. <i>Ventino. El Precio de la Gloria</i> (serie) Prime Video - N° national titles 4 1. <i>Rigo</i> (serie) 2. <i>Los Billis</i> (serie) 3. <i>Manes</i> (serie) 4. <i>Tia Alison</i> (telenovela) VIX - N° national titles 1 1. <i>Ana de Nadie</i> (telenovela) Disney + - N° national titles 1 1. <i>El club de los Graves</i> (telenovela) RTVC Play– N° national titles 1 1. <i>Las Gestas del Tiempo III</i> (serie/experiencia interactiva) Total: 12	Netflix– N° titles 1 1. <i>Pasión de Gavilanes. La Dinastia Indomable</i> (serie – USA - Colombia) Total:1

Source: Obitel Colombia

3.4 VoD narrative features in 2023

At the narrative level, it should be noted that the productions that circulated at the premiere level in VoD maintain a close relationship with the narrative proposals that were present in the open signal, not only because they were the same productions in 50% of the cases, but also because the proposals were marked by a deep relationship with the daily lives of Colombians, either in the Source offered by the story of the sports hero in the case of *Rigo* or by the memory of a musical group as in the case of *Ventino. El precio de la gloria*. Thus, biographical stories, as in broadcast television, became the protagonists of VoD, without leaving aside the importance of melodramatic structures that were present in *Ana de Nadie* and in the second season of *Pasión de Gavilanes*. To this was added, in the case of productions created as exclusive content for platforms, the look at the current conditions of men in the case of *Manes*, of the new media figures in *La Influencer* or that customary mix between the everyday universe and the world of violence in *Los Billis*, which is inspired by a group of young people who became an upper class gang in the Bogotá of the 80s. In this context, in which the narratives of the platforms are linked to the underworld

of crime, the story of *Romina Poderosa* also appears, in which the difficulty encountered in the relationship with a convulsed environment such as the one that characterizes the nation in some of its territories is once again thematized.

However, during this panorama that represents the search for a story that also characterized the dynamics of narrative in television fiction in Colombia, the efforts made in the case of RTVC Play and the public media system for innovation and the possibility of merging genres and conditions for structuring the ways of telling a story stand out once again. Thus, in 2023, *Las Gestas del Tiempo*, in its third season, is offered as a hybrid production based on the combination of fiction with elements of reality and documentary to generate an interactive series proposal in which narrative forms are intertwined in which the fourth wall is broken and direct dialogues are established with the viewer, being the frame of reference the historical event known as the Bogotazo. In this way, as has happened with transmedia or interactive television proposals made in previous years, Colombian public television is concerned with exploring the various conditions that could be worked in digital spaces and, against the current of the narratives of the platforms that increasingly narrow the border between the telenovela and the series, are concerned with finding new ways to build fictions and narratives, now with a greater emphasis on interactivity and hybridization.

4. Interactivity and audience participation in digital environments.

For the analysis of interactivity, we have taken as a reference one of the most watched fictions of the year and with greater homogeneity in its audience, *Rigo*, a series that, in the words of its director Juan Carlos Mazo, sought once again to turn an audiovisual production into a family plan in front of the screen, for which a campaign was launched and circulated in social networks and newspapers. In TikTok, the protagonist and some of the actors could be seen inviting families to watch it. Thus, under the title: “el elenco de Rigo ya empezó grabaciones...” a video was uploaded to YouTube by the RCN channel, which reached 51k views and 2.1k likes. This strategy was reinforced in print media such as *Pulzo*, *El Tiempo* and *El Colombiano*, where publications were published prior to the launch and during the stages of the series, as a way of monitoring its impact on audiences.

This notion of experience and the media replication of the fiction was such that it even reached to be measured in other spaces. Thus, for example, the worldwide petition platform *change.ORG* registered a petition made by a viewer on December 2, 2023 under the title: “¡Salvemos RIGO en diciembre! ¡No saquen la serie del aire!” to Canal RCN, which argued that: “RIGO no es simplemente una serie, es un fenómeno cultural que ha dejado una impresión imborrable en los corazones de

los espectadores” which, although it did not reach the goal of 100 participants, did manage to show the importance of the fiction for the audiences. The petition arose because RCN makes changes in programming during the holiday season due to the transmissions and contents of the season, but some viewers wanted to continue watching the transmission of the series. However, the petition did not reach the impact also because of the presence in platforms, specifically in Amazon Prime and because, due to the date in which it was presented, there was still a good percentage of people who wanted a break to continue in the following year with the faithful appointment to watch the fiction on the small screen.

The idea of Rigo as an experience was also composed based on the musical setting of the series. Thus, the official song called “El hijo de Urrao” achieved 1.8 million views on the Youtube platform, in a video that was uploaded by an unofficial account, while the official version on Spotify reached 1.1 million views. It is a guasca, a popular musical genre from the department of Antioquia and the Eje Cafetero. Its lyrics contain simple humor, which is incorporated into a television medium. It is also important to mention that there is even a complete playlist of the telenovela uploaded by the television channel with popular songs from the region, which contributes to the construction of identity and production of meaning that exalts regional customs and essence. On the other hand, a remarkable reaction to the fiction has been visible in the Google reviews section. Thus, to date, 248 ratings have been registered under the search “Rigo television series”, obtaining a weighted score of 4.8. There are comments such as: “La verdad no soy de ver novelas ni nada por el estilo, pero después de escuchar tanto de esta, decidí verla y que sorpresa tan agradable me he llevado”. Similarly, the Google Trends tool shows that the highest search period by users was in December 2023, including international participations.

As for networks such as Facebook, the fan page “Rigo la serie. Historia de un gran ciclista” has 48 thousand followers and 17 thousand likes. The hashtag #rigo counts on Facebook with 88 thousand posts and 9.4mil followers, on Instagram with 66.4 thousand posts between posts and reels, mainly surveys and fragments of the telenovela; on Tiktok there are 2.1 thousand posts. It is also common to use the audios of the official playlist incorporating the series in everyday life. The critical TV blog page currently has 8 publications dedicated to Rigo, in which the content varies between predictions prior to the premiere and criticisms from a filmic perspective.

In the social network X there are memes with the hashtag #rigo, as well as direct opinions of agreement or disagreement with the way the characters act: “SOFIA ES MUY INSOPORTABLE ...” expresses a user; details of the audiovisual posted by followers, “Qué multiverso tan chimba... jajaja, Evaristo Rendón y Hugo Lombardi xD” ; video shorts with comments like: “Y si #Rigo dura para siempre? Jajaja”; relative expressions about moments: “LE LLEGO LA JUSTICIA DIVINA A EVARISTO RENDÓN”; emotive expressions: “¿Qué escena más hermosa, ver a Rigo y su mamá

disfrutando de los frutos del ciclismo? #Rigo”; viewers’ sadness at the ending: “Ya no volveremos a escuchar”, “que pena con usted, siempre tan pispa y dedi parada #rigo”, which are some of the numerous participations of the users. In this way it is possible to point out that the notion of experience was built from the interaction between the series on screen, its music and a direct relationship with the feeling and folklore of the region, without leaving aside the presence and charisma of the person on which it is based, so that the emotional factor played a definitive role in terms of the construction of processes of interactivity and appropriation of the series by the audiences.

5. Highlights of the year

In 2023 it is necessary to point out that the highlight of the year was precisely the return of a relevant place to telenovelas and in particular the way in which the boundary between its narrative conditions and those of the series became more blurred. This became visible, first of all, in the way in which the top 10 of the year was headed by *Ana de Nadie*, a telenovela that gathers the elements of a narrative composed of different acts and a central emphasis on melodramatic aspects associated with the story of Ana, who, upon discovering her husband’s infidelity after 25 years of marriage, decides to leave him and give herself to experiment, recalling aspects of the 1993 telenovela *Señora Isabel*, in such a way that, in her actions, the power of eroticism in an older woman becomes visible. Thus, the narrative not only retakes the path of a production of more than 30 years ago (resembling a remake), but also allows the updating of the story to become a door of relationship with the audiences, who found in the offer of the year an important heterogeneity in terms of themes and possibilities, but, in the end, a set of relationships between them, The audiences found in the year’s offer an important heterogeneity in terms of themes and possibilities, but, in the end, a set of relationships with the daily life of the nation’s inhabitants, both in the anonymity of a telenovela figure and in the public life of a sports figure.

This was the case of *Rigo*, a series that captured the public’s attention at the end of the year and became one of the most watched on broadcast and part of the top 10 on Prime Video. However, beyond its top place or the concept of experience linked to its production, what is interesting lies in the Source of its narrative: Rigoberto Urán, one of the most important cyclists in the country, Olympic medalist and protagonist in the great European tours. His biographical series not only connects with the charisma that has made him a beloved figure in the country (which would explain the even distribution of audience among socioeconomic conditions and ages) but also, in terms of structure, it is located in a kind of gray area between telenovela

and series, both for its duration in chapters and for the melodramatic matrix that is superimposed on the life story of the sportsman born in Urrao. Something similar happens with *Leandro Díaz*, which also integrates the fame of the singer represented with that of its main actor, Silvestre Dangond, but which has a story structure that at times assumes the logic of the series with its chaining and fast pace, but at other times approaches the telenovela and its pauses, always in pursuit of an open structure and multiple converging stories.

Within this framework, it is worth noting the presence of three more telenovelas in the top 10 of 2023 premiere fictions, two of them in the afternoon slot: *El Amor Invencible* and *Cabo*, which occupied the space traditionally destined to Turkish productions but which retaken that connection with the classic melodrama and the interwoven structure that recalls the great stories of the 80s. These are a couple of productions that connect with those stormy stories of love and intrigue, dramas that dialogue with the audiences that grew up with productions in which, in a fairy tale fashion, the story of an impossible love was told with characters located in opposites and contraries. On the other hand, in the case of *Tía Alison*, the third telenovela of the four that occupied spaces in the top 10, it is necessary to point out that the same case happens with *Rigo*, since the border between its condition of telenovela with the narrative schemes of a series is not entirely clear and although it is a self-concluding production, it could well give for a new season as it happens with the fiction dedicated to the cyclist from Antioquia. Thus, in these productions it becomes visible that the telenovela structure begins to position itself again and to explore those conditions of hybridization with the series format, making it difficult to distinguish beyond the denominations, because just as in *Rigo*, classified as a series and structured in seasons, there are elements of telenovela, in *Tía Alison*, there are elements of seriality and own conditions of the telenovela production, being even something in common the duration of an average of 60 chapters for each production.

As for the other most watched productions, it is necessary to take into consideration that *Romina Poderosa*, *Ventino*, *El Precio de la Gloria* and *Los Medallistas* are more clearly placed in the structure of a series, but only the first of them managed to stand out in the rating, since, if reprises and even Turkish productions are taken into account, both *Ventino: El Precio de la Gloria* and *Los Medallistas* would not be part of the most watched fictions of the year. This paradoxical condition has a narrative explanation: *Romina Poderosa* maintained, faithful to the series format, an agile rhythm, with a strong relationship with violence and music, something that has been a constant of identification with the audience, while the other two productions were lost between the biography of a musical band and a group of Olympic medal winners in Colombia and the little knowledge of the public about these figures, without leaving aside a less dynamic narrative than the one deployed in the case of Romina's story and her search for justice before the murder of her twin sister.

6. The theme of the year: What is happening with narratives in Ibero-American fiction?

The narrative panorama of television fiction productions offers a disturbing heterogeneity. Beyond the uniformity that characterized a certain dominance of melodrama and episodic structure, multiple and with a certain link to fairy tales in other decades in national fiction and its telenovelas focused on the love stories between the humble woman and the kindly millionaire man, or the experimentation towards the daily life of scenarios such as haciendas, coffee plantations or offices, which allowed the appearance of characters such as Gaviota, Betty or Soledad Ahumada, female protagonists that change the paradigm of the character in Colombian soap operas such as *Café, con Aroma de Mujer*, *Yo soy Betty la fea* and *La Potra Zaina*, the narratives of recent years present a diversity that dialogues directly with the heterogeneity of social conditions typical of a time of contradictions and multiplicities such as the present. In this way, the narratives on the small screen and also on the horizon of the platforms are concerned with the creation of stories in which, although it is still clear that, as Bruner (1986) points out, “the object of narrative is the vicissitudes of human intentions” (p.27), these contingencies have changed and, in parallel, a set of resources and interactions appear that go beyond the local sphere and build different scenarios for action and its transposition in the story. Thus, in recent years, protagonists have emerged, from protagonists who carry the classic melodrama as part of their existence in stories of overcoming and suffering to the overexploitation of central figures in the field of crime and drug trafficking, both real and fictional, without leaving aside the rebound of the narrativized lives of musical, sports or historical icons of national life.

This transition towards a heterogeneous narrative is also a process that is combined with the presence of ways of constructing the narrative that intersect with the panorama that is marked by the development of digitalization processes and the emergence of new technologies in which it is not only possible to conceive different narratives that go through issues such as transmedia or the hybridization of formats and the exploration of interactivity, but also the direct relationship with the construction of new visions of the world, in a global perspective, with references that combine universality and the local color of the regional. Thus, if it is understood that, in contemporary societies, precisely “in the platforms things happen beyond algorithms” (Scolari, 2022, p.96), what emerges is a panorama in which connectivity has driven new figures and forms of the social and, alongside the transition from the heroic to the ironic (Martin Barbero, 2005), what becomes visible is also a set of conditions in which subjects relate to screens, languages and ways of organizing reality that go beyond the limits of the territories enclosed by physical space. Although this condition has led, at the technical level of storytelling, to the emergence of processes such as transmedia narrative or

interactive exploration, which in Colombia finds its greatest representative in the public media system RTVC in cases such as *Paciente, El Inquisidor* and, in 2023, *Las Gestas del Tiempo*, it is clear that it has generated other figures in terms of characters and the configuration of chronotopies in the structures of the stories. Thus, in fictions such as *La Influencer*, the protagonists are those new roles born with technologies and the subjects that appear in productions such as *Manes*, in which conditions of deconstruction of what the masculine implies arise in accordance with a different era.

Now, it is necessary to take into consideration that these conditions of storytelling have also led to the question of whether there is a kind of stagnation in the Source of the stories presented on screen, due in some way to the overexploitation of topics and narrative resources, as well as the presence of reprises, remakes and biopics as central forms of the story that occupies the programming both on the small screen and on platforms. In the Colombian case, since the pandemic, reruns have become part of the media landscape and productions such as *Yo soy Betty la fea* have become a recurring actor in terms of the configuration of the schedules, whether on broadcast or streaming services. Thus, in the last year, as well as in the five-year period, the characters that were successful decades ago have been gradually appearing and once again have that prominence that allows them to position themselves among the most watched fictions because of nostalgia. Thus, along with an exploration of memory, the stories of the past become both a way out of the lack of productions, as it happened in pandemia, and a formula to connect with audiences that begin to recreate themselves in the past.

Something similar happens with remakes and continuations, although the guarantee of occupying representative positions in terms of ratings is not entirely guaranteed. In the structure of the remake as a narrative format, the aim is to retell the story by updating it, which may represent a resounding failure, as it happened with the new version of *Café, con aroma de mujer*, or a guaranteed success, as it happens in 2023, with *Ana de Nadie*, which is conceived as an update of *Señora Isabel*.

And the question does not lie in the temporal distances between the original fiction and its remake, but rather in the way in which it manages to retell the vicissitudes that were captured narratively and transmit them in a new time. The continuations, on the other hand, obviate this updating of the story and are better placed to tell what has happened afterwards, combining the nostalgic resource of the narration of yesterday with the conditions of the present, addressing the question of what has happened to? and that, in the case of Colombia, is represented in *Pasión de Gavilanes*. *La Dinastía Indomable* and the future projection of a new installment of *Yo Soy Betty la Fea* and *Pedro El Escamoso*. In these cases, the bet is as risky as the remake, but there is the possibility of creating new stories and conditions.

This situation of adaptations, continuations and reprises is similar to what is happening in the audiovisual panorama in the global cinematographic field, which has led to speculation in relation to a possible lack of ideas or the prerogative of profitability over the risk involved in narrative experimentation in the field of fiction. However, what is perhaps found is that the narratives are again saying something about the subjects and, in the case of Colombia, this is dynamically linked to a historical-cultural condition in which a deep exploration of identities in tension becomes visible, which configures a set of cultural matrices in which inhabits a richness proper to the diversity of notions and anchors proper to a globalized, hyper-cultural world (Lipovetsky, 2011; Han, 2019), in which storytelling perhaps reflects the disturbing condition of everyday life and, amidst the oceans of information of networks and platforms, the possibility that storytelling still has to build spaces for communication, because, if “stories, by fostering the capacity for empathy, create bonds between people. They generate a community” (Han, 2023, p. 16), what we see on screen, however simple or repetitive it may be, ends up becoming what allows subjects to talk, converse, discuss and build in common.

This becomes more latent in the other narrative figures that appear in the heterogeneity of stories in Colombian television fiction and that encompass the protagonists of biographies and the ever-present narratives of violence. For some years now, it has been usual to see sportsmen, singers and heroes of the national history as protagonists of everyday conversations. The soccer players recreated in *La Selección*, Diomedes Díaz, narrated in *Diomedez*, *El Cacique de la Junta*, Policarpa Salavarrieta, reimagined in *La Pola* and more recently figures such as Arelys Henao, incarnated in *Arelys Henao: Canto para no Llorar*, add to what also materializes in 2023 with Rigoberto Uran and his story made series in *Rigo* and which refers to making the public character a close subject, whose existence becomes the central focus of what is told on screen through a narrative pact of the plausible, since none of the narratives has a documentary intention, but rather a reinterpreted power protected by the melodrama as an omnipresent figure in the stories. This centrality of the characters associated with people who star in different dimensions of national public life, while facilitating the possibility of the narratives to lead to the one who, in the configuration of actions and figures, “by narrativizing the aim of true life, gives it the recognizable features of beloved or respected characters” (Ricoeur, 2006, p. 169), given that love and respect is something that is held by the public, they also present a possibility of connection and identification with the audiences that is largely based on the level of recognition of the figure on screen, since, just as *Rigo* achieved first places in ratings, the same did not happen with productions such as *Los Medallistas* or *Ventino. El Precio de la Gloria*, which, although they reconstructed the lives of sportsmen and singers, did not achieve the audience’s identification.

However, not only the known character of the figures on screen is a decisive factor in the construction of the relationship between narratives and audiences. The way in which the stories are constructed is also a fundamental element and in this, the ever-present theme of violence plays a role as important as the one found in melodrama or humor as resources of the stories to enhance the relationship with the audiences. Thus, while in *Rigo*, the protagonist's self-confidence and personality reinforce his on-screen presentation, in productions such as *Romina Poderosa*, it is the environment of crime added to an agile and startling narration that leads to greater consumption. A question in which, beyond the resource of action, what appears is precisely that close link between the ways in which violence is re-created and told on the screen, which was central in the productions of the overexploitation of drug trafficking and which also made presence in recent years in the reprises that, for the year 2023 have their greatest representative in productions such as *Escobar, el Patrón del Mal*, whose audience was even higher than that of the last seats in the top 10 of the premiere fictions. In this, beyond the perhaps moral look in relation to the way in which the lives of drug traffickers and organized crime have been represented on the screens in productions of yesteryear such as *El Capo*, *El Cartel de los Sapos* or *Las Muñecas de la Mafia*, what is important is to see that, as in the case of *Romina Poderosa* and somehow also seen in recent years in aspects of the story of productions such as *La Reina del Flow*, violence becomes one more component of the vicissitudes and daily life of Colombians, which make catharsis in the narration and, besides being one more resource of the story, it also offers an interesting look at a polyphonic cultural matrix composed of both the humor and warmth of the athlete represented on screen, and the melodramatic struggle of the person who seeks the future and the violence lurking in every corner of a country of contrasts and tensions like Colombia.

To conclude, it is also necessary to point out the way in which the panorama of narratives offered two interesting conditions to complement that heterogeneity typical of a panorama in which multiplicity evidences the search for ways of narrating among diverse referents and conditions: the presence of classic melodrama in the television consumption of the afternoon slots and the experimentation in public television of other ways of narrating. Thus, if, as Jesús Martín Barbero (2005) points out, "cultural communication in the 'information age' names above all experimentation, that is to say, the experience of appropriation and intervention" (p. 34), In the Colombian case, these experiences go through the search for narration between melodramas, biographies, reprises, remakes, humor, continuations and violence, as well as the nostalgia embodied in the presence of classic stories, the stormy love stories between good and bad and, at the same time, the emergence of proposals that narrate in another way, with audience participation, hybridizations in formats and breaking the fourth wall. This is visible in the presence of productions in the afternoon slot, in

the last years of Turkish telenovelas, with structures similar to those of the productions of the 80's and that, with the presence of narratives such as *Cabo* and *El Amor Invencible*, put back on screen those stories with which the attention of a portion of the audience is triggered, which revives, as with the reprises, that narrative rhythm ready to melodrama. In contrast, on the other side, the intervention in proposals such as the aforementioned *Las Gestas del Tiempo*, which can not only be fiction, but also use multiple resources and integrate the viewer as part of the story.

Narrative in Colombia is, to this extent, in a process of search among the heterogeneity of a panorama in which there are multiple ways of telling stories and diverse resources that coexist between reprise and novelty, experimentation and nostalgia, the life story of the famous character and the daily narration of the subject of the melodrama. A diverse condition of narration in which one experiences and speaks of a nation that is also in search of itself, of those new cultural matrices that are no longer monological or univocal, but that evidence the intertwining of the global and the local, the analog and the digital, humor and violence, anguish and hope. In short, narratives that make visible a nation that is told with diverse voices and references, with nostalgia but also with illusion, with an awareness of the relationship with the conflict but also with sports and musical glory, without leaving aside those daily lives and vicissitudes that make the character on screen a representation of the Colombian who faces life day by day with those exquisite mixtures between enthusiasm, restlessness and above all, enthusiasm, restlessness and above all, the Colombian who faces life day by day with those exquisite mixtures between enthusiasm, restlessness and above all, the Colombian who faces life day by day with that exquisite mixture of enthusiasm and restlessness. In short, narratives that make visible a nation that is told with diverse voices and references, with nostalgia but also with illusion, with an awareness of the relationship with the conflict but also with sports and musical glory, without neglecting those daily lives and vicissitudes that make the character on screen a representation of the Colombian who faces life day by day with those exquisite mixtures between self-confidence, enthusiasm, restlessness and, above all, the gaze set on a future that is built day by day in a sea of uncertainties, conflicts and polyphonies such as those that populate the multi-screen ecosystems in which the complex diversity of his story is told, which is at the same time the story of a world in expansion, search and experimentation typical of the so-called information age.

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MEXICO: CONTEMPORARY NARRATIVES IN FICTION. GENDER VIOLENCE AND INCLUSION IN THE CONTEXT OF THE GROWTH OF VIX.

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Authors:

David González Hernández (<https://orcid.org/0000-0003-3041-8750>)

Gabriela Gómez Rodríguez (<http://orcid.org/0000-0002-2078-1671>)

Adrien Charlois Allende (<https://orcid.org/0000-0002-0566-0126>)

Darwin Franco Migue (<https://orcid.org/0000-0003-2979-2956>)

Introduction

The year 2023 represented, with greater clarity, the reorganization of media corporations in Mexico with the Televisa-Univision merger, which is reflected in the narratives that address issues such as gender violence or the inclusion of sexual diversity, as well as in the sustained growth in the number of productions by the Vix+ platform. Although fiction maintains its high production of previous years on open television, there are several noteworthy aspects that show the changes in the audiovisual system.

Firstly, there is a decrease in the number of national premieres on broadcast television channels, which implies that the major networks are betting on production and distribution for streaming. In this sense and for the first time, the Vix+ platform, owned by TelevisaUnivision, surpassed Netflix, the dominant platform in production since 2015 when it arrived in Mexico, in number of premieres. The increase in fiction production of this international company is consolidating drama, suspense, and bioseries programming, while comedy has been reduced in the offer. Also, the bet on production and distribution for streaming has created a scenario in which more series than telenovelas are produced, in a shorter format in terms of number of episodes and duration.

This has had a twofold effect. On the one hand, the diversification in the production of stories continues: this year, for example, stories with a gender and inclusion perspective were produced, as mentioned above. On the other hand, it has meant that TelevisaUnivision's concentration of ownership has been strengthened by the acquisition of production companies such as Argos Media, one of its main national competitors.

1. Mexico's Audiovisual Context in 2023

2023 has been a year of consolidation of fiction production on VOD platforms, a scenario that now seems to be a furtive space for the broadcasting of series with more modern and even daring narratives in thematic and aesthetic terms.

A conclusive fact is that only 23 new titles were premiered on national open television, while on platforms such as Netflix, Vix, Prime, HBO Max, Star, and Disney+ there were 36 premiere fictions. The reasons, as we will explain in this chapter, respond to the commitment of these platforms to attract subscribers through the production and transmission of exclusive series, but also because it is known that audiences, especially the younger ones, have increased and consolidated their consumption on other screens.

At the same time, 2023 was a hectic year in electoral terms, as the presidential pre-campaigns, which began in the middle of the year, further increased the political-media polarization and, therefore, the different media increased their coverage (in favor and—especially—against) of the so-called “Cuarta Transformación” (“Fourth Transformation”) initiated by President Andrés Manuel López Obrador and which is intended to continue through Claudia Sheinbaum, who won the 2024 presidential elections.

1.1. Open television in Mexico

The six-year term of Andrés López Obrador ended without fulfilling the promise of democratizing national open television, so there are still 12 national television networks in the country. The possibility, in the case of the private networks, of having a fourth competitor was not possible, although major companies such as América Móvil showed interest.

Moreover, no review of the concessions to private networks was carried out, a matter that López Obrador said he would do after “the dirty campaign” that they ran against him in the 2018 election campaigns. It should be added that Imagen Televisión has only put into operation 63 channels out of the 123 that were assigned to it in 2015. Imagen Televisión, which belongs to Grupo Imagen, has had several crises in 2023, with lawsuits and personnel layoffs. The network has not been able to boost ratings, and its content does not engage the audience.

Chart 1. National open television networks/channels in Mexico

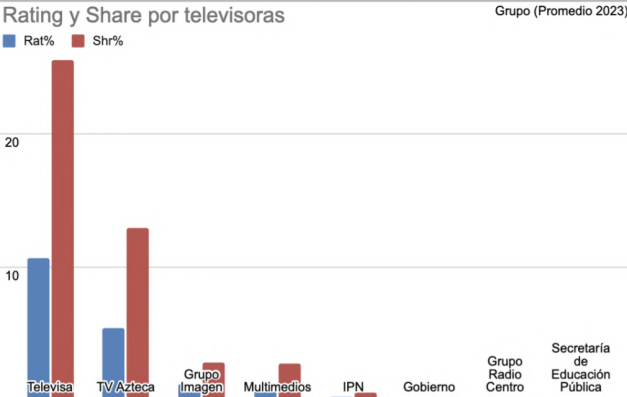
Private networks/channels (3)	Public networks/channels (3)
Televisa (Channels: Las Estrellas, 5, 9, and Foro TV)	Once TV (Channel 11 and 11.1)
TV Azteca (Channels: 1, 7, Adn 40, and A+)	Conaculta (Channel 22)
Imagen Televisión (Channel 3)	Sistema Público de Radiodifusión del Estado mexicano (Channel 14)
TOTAL NATIONAL NETWORKS = 6 Channels: 12	

Source: Obitel Mexico.

As shown in Graph 1, Televisa is the company with the highest rating on open television in the country. In second place is TV Azteca, and, with just over 1 percent of rating, Imagen Televisión is the 3rd one, which has chosen to include Turkish tele-novelas in its programming, while TV Azteca recently produced a series in 2023, after having quit fiction.

Graph 1. TV rating and share per station (rating per household).

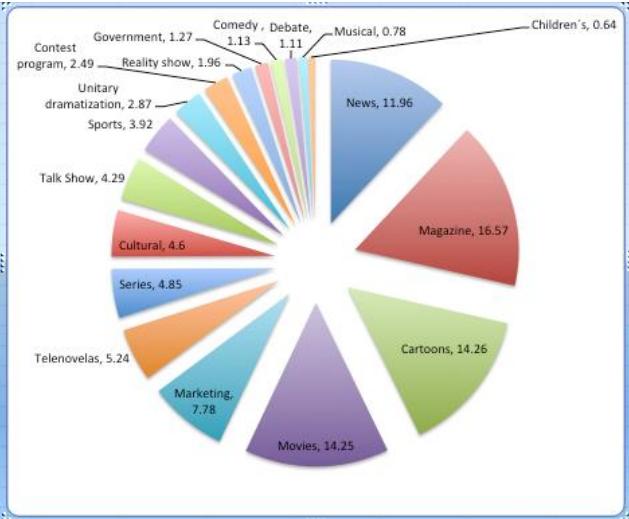
Group (2023 Average)	Households	
	Rating%	Share%
Televisa	10.65	25.53
TV Azteca	5.41	12.97
Grupo Imagen	1.19	2.86
Multimedios	1.14	2.74
IPN	0.23	0.55
Government	0.06	0.15
Grupo Radio Centro	0.04	0.1
Secretaría de Educación Pública (Secretary of Public Education)	0.03	0.08
TOTAL	18.75	44.98



Source: Nielsen IBOPE México; Television Audience Base 5 Domains; MSS TV, Rat%, Shr%; 01/01/2023 - 12/31/2023, 6:00 - 24:00; Targets of people with Guest. For each target: Rank by Rat%, Group of open TV channels.

Graph 2: Genres and hours broadcast in TV programming

Genres broadcast	Hours	%
Magazine	8864:07:09	16.57%
Cartoons	7628:05:09	14.26%
Movies	7621:15:35	14.25%
News	6397:58:45	11.96%
Marketing	4160:15:15	7.78%
Telenovelas	2804:37:06	5.24%
Series	2592:16:19	4.85%
Cultural	2461:17:20	4.60%
Talk Show	2297:12:14	4.29%
Sports	2095:28:00	3.92%
Unitary dramatization	1534:45:40	2.87%
Contest program	1334:33:16	2.49%
Reality Show	1046:42:52	1.96%
Government	677:58:52	1.27%
Comedy	603:36:32	1.13%
Debate	591:08:48	1.11%
Musical	417:15:52	0.78%
Children's	341:23:04	0.64%
Religion	22:15:19	0.04%
General	00:10:00	0.00%
TOTAL	53492:23:07	100%



Source: Nielsen IBOPE México; Television Audience Base 5 Domains; MSS TV, Rat%, Shr%; 01/01/2023 - 12/31/2023, 6:00 - 24:00; Targets of people with Guest. For each target: Rank by Rat%, Group of open TV channels.

As we can see, magazine programs are the preferred choice of private television stations, representing 16.6% of the total number of genres produced and broadcasted, while telenovelas are in fifth place and unitary dramatizations in eleventh place. Televisa is the company that produces the most telenovelas in Mexico, while TV Azteca, as we have pointed out in previous years, almost completely abandoned the production of this genre in favor of reality shows.

1.2. Pay TV and VoD platforms in Mexico in 2023

Chart 2. Pay TV Channels in Mexico

10 most watched pay TV channels in México			
Channel	Genre	Country	Household ranking
Disney Channel	Children’s	USA	28%
Discovery Channel	Information	USA	23%
TNT	Fiction	USA	18%
HBO	Information	USA	17%
National Geographic	Information	USA	17%
De Película	Fiction	Mexico	17%
Cartoon Network	Children’s	USA	16%
Star Channel (FOX)	Fiction	USA	16%
History Channel	Documentary	USA	14%
ESPN	Sports	USA	13%

Source: Statista (2023)¹.

In Mexico, there is a prevailing taste for television from U.S. networks, transmitted through pay TV, especially in the following genres: children’s, movies, documentaries and sports. Chart 2 shows only one platform from Mexico (De película), while more Mexican companies appear in SVoD, such as Vix, Casa Caníbal, Claro-Video, Filmo-teca, among others, which are becoming more popular among Mexicans, mainly VIX.

Chart 3. Main SVoD platforms in Mexico

Vix (TelevisaUnivision)	Movistar+ (Telefónica)
Netflix	Star+ (Walt Disney Company)
Max (Warner Bros Discovery)	Apple TV (Apple Inc.)
Filmoteca (UNAM)	Cinépolis Klic (Organización Ramírez)
Disney Plus (Walt Disney Company)	Claro-Video (América Móvil)
DAZN (Perform Group)	Pluto TV (Paramount Global)
Prime Video (Amazon)	Paramount + (Paramount Global)
Acom-TV (AMC Networks)	Curiosity Stream (Amazon Prime)
Crunchyroll (Sony Group Corporation)	Filminlatino (IMCINE) - Mexican
Fox Premium (Fox Corporation)	Tubi (Fox Corporation)
Mubi	Plataformacine
Fox Play	YouTube (Google)
Casa Caníbal (Cine Caníbal, Mexican)	

Source: Prepared by the authors.

¹ <https://es.statista.com/estadisticas/1188311/canales-television-paga-mexico/>

1.3. Sources of financing for the audiovisual sector

The year 2023 stands out due to the decrease in revenues of the most important private television stations in Mexico. Televisa, in 2023, had a total loss of 10.236 billion pesos (approximately 602 million USD). In 2022, the same company had profits of 44.7 billion pesos (2.63 billion USD), so the figure is significant. On the other hand, TV Azteca has been characterized for presenting unstable financial data, due to its high indebtedness (around 488 million USD), the fall in advertising in the domestic market and, also important, the drop in the reception of revenues from official advertising (Vidal Bonifaz, 2024)².

1.4. Communication policies

One of the main communication policies developed in Mexico in 2023 was the Public Site Connectivity Program 2023, which aims to: “identify and locate public sites throughout the national territory with free Internet connectivity needs, in order to achieve universal coverage” (PCSP, 2023)³.

These connectivity points are planned to be installed in 5 088 priority public sites, distributed, mainly, in the south of Mexico, specifically in indigenous communities in the states of Oaxaca, Veracruz, Puebla and Chiapas (PCSP, 2023).

As mentioned above, the expected communication policies focused on the democratization of the broadcasting and telecommunications sector did not materialize, allowing the continuation of a policy in which the major players in the sector: América Móvil (which includes Telmex and Telcel), Grupo Televisa, Grupo Imagen and Grupo Salinas maintained their economic supremacy.

1.5. Digital and mobile connectivity infrastructure

In Mexico, by 2023, the increase in Internet penetration was maintained, reaching almost 100 million users in a country of 126 million inhabitants, with a notable increase of 16 million Internet users, from 82.8 million in 2021 to 98.6 million (Statista, 2023)⁴.

This is a considerable increase, however, there are still almost 30 million people without Internet access in the country. With the arrival of CFE (Federal Electricity Commission) in the telecommunications sector, it is expected that this gap will be reduced. Men are the most connected (51.8%) while women are slightly less (48.23%). Users connect through smartphones (95%) and computers (42%) while digital television is gaining more and more ground every day (23%). The most popular times to connect are in the afternoon and evening. 83% of users maintain an

² <https://revistazocalo.com/tv-azteca-el-principio-del-fin/>.

³ https://www.gob.mx/cms/uploads/attachment/file/791995/PCSP_2023.pdf

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.>

active Facebook account, but TikTok is gaining more users every day, especially among young people (Infobae, 2023)⁵.

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

Table 1. Premier fiction titles broadcast in 2023
(national, foreign -OBITEL area-, and coproductions)

National premiere titles: 34 Televisa: national titles 1. <i>El Colapso</i> (miniseries) 2. <i>Eternamente amándonos</i> (telenovela) 3. <i>Tierra de Esperanza</i> (telenovela) 4. <i>Perdona nuestros pecados</i> (telenovela) 5. <i>Pienso en Ti</i> (telenovela) 6. <i>Vencer la Culpa</i> (telenovela) 7. <i>Golpe de suerte</i> (telenovela) 8. <i>Minas de pasión</i> (telenovela) 9. <i>Nadie como tú</i> (telenovela) 10. <i>El Maleficio</i> (series) 11. <i>Gloria Trevi: Ellas soy yo</i> (series) 12. <i>Se llamaba Pedro Infante</i> (series) 13. <i>Como dice el dicho 13</i> (unitary dramatization) 14. <i>La Rosa de Guadalupe 18</i> (unitary dramatization) 15. <i>Esta historia me suena 6</i> (unitary dramatization) 16. <i>Senda Prohibida</i> (series) 17. <i>Una familia de diez 10</i> (sitcom) 18. <i>Vecinos 14 y 15</i> (sitcom) 19. <i>40 y 20 10</i> (sitcom) 20. <i>Tal para cual 2</i> (sitcom) 21. <i>Relatos mascabrothers 6 y 7</i> (sitcom) 22. <i>Renta congelada 5</i> (sitcom) 23. <i>¿Tú crees? 2</i> (sitcom) 24. <i>Bola de locos</i> (sitcom) 25. <i>Chócalas compayito</i> (sitcom) 26. <i>Está libre</i> (sitcom) 27. <i>¿Es neta Eva?</i> (sitcom) TV Azteca: national titles 28. <i>Dra. Lucía, un don extraordinario</i> (series) 29. <i>El rey Vicente Fernández</i> (series) 30. <i>Lotería del crimen</i> (series) 31. <i>Pancho Villa: El centauro del norte</i> (series) 32. <i>Un día para vivir</i> (unitary dramatization) 33. <i>Rutas de la vida 3</i> (series) 34. <i>Lo que llamamos las mujeres</i> (unitary dramatization) Imagen TV: 0 national titles Canal Once: 0 national titles Canal 22: 0 national titles COPRODUCTIONS - 0	Foreign premiere titles OBITEL: 3 Televisa: 2 imported titles 35. <i>El Doctor del Pueblo</i> (series) TV Azteca: 0 imported titles Imagen TV: 2 imported titles: 36. <i>Sansón y Dalila</i> (miniseries) 37. <i>Amor de Madre</i> (telenovela) Canal Once: 0 imported titles Canal 22: 1 imported title Non OBITEL foreign titles: 6 Televisa: 1 imported title 38. <i>¿Qué culpa tiene Fatmagul?</i> (telenovela) Imagen TV: 3 imported titles 39. <i>Golden Boy</i> (telenovela) 40. <i>Tres hermanas</i> (telenovela) 41. <i>El Sultán</i> (series) Canal 22: 0 imported titles 42. <i>Medici: Maestros de Florencia</i> (series) 43. <i>Carlo Magno</i> (series) Reruns national titles: 9 Televisa 44. <i>Teresa</i> (telenovela) 45. <i>Marimar</i> (telenovela) 46. <i>María la del barrio</i> (telenovela) 47. <i>El privilegio de amar</i> (telenovela) 48. <i>Soñadoras</i> (telenovela) 49. <i>Hoy voy a Cambiar</i> (series) TV Azteca: 1 title 50. <i>Hasta que te conocí</i> (series) Imagen TV: 0 titles Canal Once: 2 titles 51. <i>Soy tu fan</i> (series) 52. <i>XY</i> (series) Reruns imported titles: 1 TV Azteca 53. <i>Yo soy Betty la fea</i> (telenovela)

Source: Obitel Mexico.

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

In 2023, the number of fictions grew from 30 to 34 due to an increase in the production of sitcoms by Televisa, a genre that is very popular among Mexican audiences. This genre even surpasses the telenovelas produced by the network. It should also be noted that all of these sitcoms are original productions.

Imagen TV, the third TV network, does not generate its own fiction; instead—as can be seen in the table—it opts for the purchase and transmission of Turkish telenovelas. What is noteworthy is the consolidation of fiction production, specifically series, in TV Azteca, something it has been doing since 2021, after a period of more than three years in which it stopped producing fiction. This year it aired on its main channel: *Dra. Lucía, un don extraordinario*.

Something else to point out is that the production of bioseries continues to be in vogue in 2023, fictions were produced on the lives of singers Pedro Infante, Vicente Fernández and Gloria Trevi.

Table 2. National premiere fiction in 2021 and its evolution in the five-year period

Format	Titles						Hours					
	2019	2020	2021	2022	2023	Total	2019	2020	2021	2022	2023	Total
Telenovela	14	5	12	11	8	50	750:00	426:00	775:00	695:00	739:00	3385:00
Series	9	5	1	6	9	30	455:00	298:30	249:10	50:00	300:00	1352:40
Miniseries	0	0	0	0	1	1	0:00	0:00	0:00	0:00	8:00	8:00
Sitcom	0	3	3	10	11	21	0:00	0:00	0:00	71:50	72:00	143:50
Unitary	2	0	0	0	5	7	167:00	231:00	324:00	313:00	476:00	1511:00
Docudrama	0	0	0	0	0	0	0:00	0:00	0:00	0:00	0:00	0:00
Other	0	0	1	0	0	1	0:00	0:00	0:00	0:00	0:00	0:00
Total	25	13	17	27	34	116	1372:00	955:30	1348:10	1129:50	1595:00	6399:90

Source: Obitel Mexico.

In 2023, more series were produced than telenovelas, and in the production of the latter, there was a decrease in the number of chapters per title, which implies the decision to produce shorter formats, which—according to the ratings—seems to be more to the liking of Mexican audiences.

In terms of production in Obitel countries, only three products were premiered in 2023 (from the United States, Brazil and Peru), although it should be noted that five of the ten most watched titles are scripts from the Obitel area.

Table 3. Premiere fiction broadcast in 2023: countries of origin

País	Titles	%	Hours	%
NATIONAL (total)	34,00	92%	1595:00	94
OBITEL COUNTRIES (total)	3	8%	99:00	6
Argentina	0	0	0:00	0
Brazil	1	4	19:00	1
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	1	4	6:00	0
Mexico	34		1595:00	100
Peru	1	4	74:00	5
Portugal	0	0	0:00	0
Uruguay	0	0	0:00	0
Venezuela	0	0	0:00	0
COPRODUCTIONS (total)	1	4	3:55	0
National coproductions	1	4	3:55	0
Obitel countries Coproductions	0	0	0:00	0
TOTAL	37,00	100	1697:55	100

Source: Obitel Mexico.

Tabla 4. Formats of national and Iberoamerican fiction broadcast in 2023

Format	Title				Hours			
	National	%	The rest of Obitel area	%	National	%	The rest of Obitel area	%
Telenovela	8	23.6	1	5.3	739:00	46.3	74:00	74.7
Series	9	26.4	1	5.3	300:00	18.8	6:00	6.1
Miniseries	1	2.9	1	5.3	8:00	0.5	19:00	19.2
Sitcom	11	32.4	0	0.0	72:00	4.5	0:00	0.0
Unitary	5	14.7	16	84.1	476:00	29.9	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	34	100	19	100	1595:00	100	99:00	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 dominios +Dish. Total television programming during 2023.

As in 2022, unitary programs (*La Rosa de Guadalupe* and *Como Dice el Dicho*) and telenovelas are the formats with the highest number of episodes and hours. Telenovelas continue to be the predominant format, although this year the series increased the number of titles and broadcast hours, as did sitcoms. Table 4 shows that although sitcoms represent 32.4% of the total number of national fiction titles, telenovelas are the ones that have the largest number of production hours: 46,3%.

On the other hand, as can be seen in Table 5, only one series managed to enter the Top Ten of the most watched titles, while the telenovela and the unitary dramatization continue to dominate in the top ten, all of them Televisa productions.

Table 5: Ten most watched titles in 2023

Title		Channel	Produced by	Format/genre	Number of episodes in 2023	Time-slot	Rating	Share
1	<i>La Rosa de Guadalupe</i>	Las Estrellas	Televisa	Unitary dramatization / Drama	159	Prime time	13.58	21.87
2	<i>Tierra de Esperanza</i>	Las Estrellas	Televisa	Telenovela / Drama	60	Prime time	13.29	21.37
3	<i>Perdona Nuestros Pecados</i>	Las Estrellas	Televisa	Telenovela / Drama	90	Prime time	12.34	21.45
4	<i>Pienso en Ti</i>	Las Estrellas	Televisa	Telenovela / Drama	75	Prime time	12.30	18.63
5	<i>Eternamente Amándonos</i>	Las Estrellas	Televisa	Telenovela / Drama	120	Prime time	12.06	23.42
6	<i>Como dice el Dicho</i>	Las Estrellas	Televisa	Unitary dramatization / Drama	65	Afternoon	12.00	21.98
7	<i>Vencer la Culpa</i>	Las Estrellas	Televisa	Telenovela / Drama	80	Prime time	11.50	18.51
8	<i>Golpe de Suerte</i>	Las Estrellas	Televisa	Telenovela / Drama	92	Prime time	11.26	17.24
9	<i>Minas de Pasión</i>	Las Estrellas	Televisa	Telenovela / Drama	107	Prime time	10.84	18.53
10	<i>Gloria Trevi: Ellas soy Yo</i>	Las Estrellas	Televisa	Series /Drama	50	Prime time	10.78	17.43
Total national productions: 10				Foreign original scripts: 5				
100%				50%				

Source: Prepared by OBITEL with national data supplied by Nielsen Ibope México, S.A. de C.V. MSS TV Software, Base “Rating regular 5 dominios +Dish. Total television programming during 2023.

As has been the case in recent years, Mexican audiences remain highly loyal to *La Rosa de Guadalupe*, as this unitary program is once again the most watched. It is followed by the prime time telenovelas broadcast on El Canal de Las Estrellas, many of these telenovelas were liked by the audience despite the fact that they are productions whose original scripts come from Chile, the United States and Turkey.

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	La Rosa de Guadalupe	Las Estrellas	8.69	4.99	8.18	14.64	16.23	23.83
2	Tierra de Esperanza	Las Estrellas	8.24	4.78	9.14	12.47	13.97	22.56
3	Perdona Nuestros Pecados	Las Estrellas	7.45	3.86	7.22	13.84	15.41	19.43
4	Pienso en ti	Las Estrellas	7.81	4.8	6.73	12.64	15.07	20.22
5	Eternamente Amándonos	Las Estrellas	7.16	3.52	8.93	11.56	13.91	18.06
6	Como dice el Dicho	Las Estrellas	7.11	3.60	7.38	12.73	14.1	18.81
7	Vencer la Culpa	Las Estrellas	7.58	4.49	7.70	10.61	12.96	20.50
8	Golpe de Suerte	Las Estrellas	6.93	4.53	6.34	10.36	13.81	19.69
9	Minas de Pasión	Las Estrellas	6.33	3.68	7.18	10.89	13.06	17.45
10	Gloria Trevi: Ellas soy yo	Las Estrellas	7.30	3.90	7.39	10.81	12.16	18.54
Title		Age group %						
		04 - 12	13-18	19-29	30-44	45+	-	-
1	La Rosa de Guadalupe	6.67	5.14	5.64	6.14	9.77	-	-
2	Tierra de esperanza	5.59	5.04	4.35	5.97	10.24	-	-
3	Perdona nuestros pecados	5.46	4.83	4.27	5.11	9.20	-	-
4	Pienso en ti	6.33	5.27	5.08	5.49	9.43	-	-
5	Eternamente amándonos	4.57	5.01	3.89	5.06	8.41	-	-
6	Como dice el dicho	4.83	4.89	4.01	5.01	8.16	-	-
7	Vencer la culpa	5.64	5.17	4.45	5.50	9.26	-	-
8	Golpe de suerte (h)	5.45	5.22	4.29	5.37	8.34	-	-
9	Minas de pasión	4.25	4.30	4.15	4.50	7.83	-	-
10	Gloria Trevi: Ellas soy yo	5.21	4.74	4.22	5.77	7.72	-	-

Source: Prepared by OBITEL with national data supplied by Nielsen Ibope México, S.A. de C.V. MSS TV Software, Base “Rating regular 5 domains +Dish. Total television programming during 2023.

As in previous years, those who consume fiction in Mexico are women over 45 years of age belonging to socioeconomic levels D+ and DE; that is, the lowest socio-economic status, while the socioeconomic group that consumes the least telenovelas is the ABC.

It is remarkable that *La Rosa de Guadalupe* is the fiction product most watched by all socio-economic levels and all age groups, which means a high consumption loyalty, specially among women between 30 and 44 years of age, and those over 45, because in the program’s narratives they find possible answers to the problems experienced by Mexican children and adolescents.

3. VoD Monitoring 2023

3.1 VoD Platform market in 2023

In 2023 there was growth in Video on Demand services, although not as high as in previous years. In 2022, subscription accounting totaled 12.6 million, an increase of 8.1% over 2021. By the end of 2023, the number of subscribers of video on demand platforms totaled 13.4 million in Mexico according to the study: “Consumption and Contracting of Video on Demand Services”, carried out by the consulting firm The Competitive Intelligence Unit 4T-2023⁶, which represents an increase of 3.1% and a deceleration (Rodríguez, 2024) compared to the years of confinement during the pandemic by Covid-19, when growth was 18% in twelve months. The streaming market in Mexico continues its diversification and fragmentation, with persistent competition among platforms such as Netflix, Disney+, Max, Vix+, Amazon Prime Video, Apple TV+, Paramount+, Claro-Video, Starz+—the most important ones—, competition that seems to consolidate the market in 2024 by way of subscription bundling.

According to a study by The CIU, in 2023, 43 million consumers opened an account, and 69% of them shared their password. Internet users are overcoming the barriers of multiple offers and are looking for more alternatives to access audiovisual content. “Although the increase in tariffs or the lack of budget makes users think twice about it, the maturity and fragmentation of services make it increasingly complicated, in addition to the impossibility of sharing accounts with friends, partners or acquaintances” (Rodríguez, 2024).

Faced with the slowdown in subscribers, Netflix and other platforms such as Vix+ have eliminated their strategies to attract subscribers to the “basic plan”, leaving available only the cheapest option, the “standard plan with ads” at a price of \$99 pesos per month (\$5 USD) and a limited catalog. According to the consulting firm The Competitive Intelligence Unit, Netflix still maintains its prevalence with 53% of total subscriptions—a loss of 8 percentage points compared to 2022. The growth from 2022 to 2023 was in Disney+ (13.5% of SVOD subscriptions) and Max (11.8%), which registered an increase in subscriptions of 0.7 (Netflix), 1 (Disney) and 1.5 (Max) percentage points. However, the arrival of TelevisaUnivision, owner of Vix+, has represented an important alternative in the streaming offer, since by the end of 2023, the platform had quadrupled its market share by achieving 7% of total subscribers in Mexico. The Vix+ company offers a free plan with advertisements, and also affordable prices or economic plans: the Vix Premium plan costs \$99 pesos per month (5 USD) while the annual plan is \$499 pesos (30 USD), that is, it has a discount of 65%.

⁶ Available on <https://www.theciu.com/publicaciones-2/2024/2/6/streaming-por-suscripcion-contratacion-y-preferencia-de-plataformas>

Platforms such as Disney+ and Max keep various plans and special offers that allow access to several devices on the same account, with prices ranging between \$150 and \$200 pesos per month (\$7 and \$10 USD), which can also be reduced with subscriptions to cable companies such as Izzi, or electronic purchases on Mercado Libre. The other platforms that have a presence in Mexico—Star+, Apple TV+, Claro Video and Mubi—have a combined market share of 4.7% of total subscribers. At the end of 2023, Lionsgate+ announced the closure of its operations in Mexico and the rest of Latin America. According to the company, the decision to leave Mexico responds to its intention to strengthen production and offering in English-speaking regions.

The access to different SVoD platforms that offer audiovisual content via subscription, the additional charge for account sharing and the increase in platform fees continues to increase the average annual expenditure of the Mexican Internet user⁷, which is around \$50 USD, estimating revenues of \$1.45 billion dollars for this sector in 2023, according to Statista consulting firm⁸.

3.2. Local VoD platforms offering in 2023 (national, regional within the country)

The offer of VoD platforms in Mexico continues to diversify; however, the domestic market presents a different media landscape. A year after the commencement of its operations, thanks to the merger of Grupo Televisa and Univision, the company Vix+ has grown its relevance with an extensive catalog of original content—in terms of production of premiere titles it surpassed the dominant company, Netflix. This is mainly explained by the acquisition of Epigmenio Ibarra's Argos Media Group by TelevisaUnivision.

It is worth recalling that Argos had produced series and telenovela content for companies such as Netflix and Telemundo. According to reports, Argos Media Group suffered financial losses after losing several contracts with Telemundo-NBC and the exit of Grupo Inbursa as a shareholder, owned by millionaire Carlos Slim, with a 30% stake. Bankruptcy was imminent despite having obtained a loan of 150 million pesos, granted by Bancomext in 2020⁹ during López Obrador's administration. Epigmenio Ibarra negotiated his place in Argos' Board of Directors and remains as a minority shareholder.

With this acquisition, TelevisaUnivision increased its production capacity for a market of 600 million Spanish speakers with the reach of Vix+. Televisa produces more than 86,000 hours per year with 17 studios located at the San Angel television station in Mexico City. Thus, the purchase of the Argos company means a significant increase in production capacity by gaining access to the eight studios located in Tlalnepantla.

⁷ Available on <https://expansion.mx/empresas/2023/09/19/los-mexicanos-gastan-casi-70-mas-en-plataformas-de-streaming-de-video>

⁸ Available on <https://es.statista.com/estadisticas/1187537/plataforma-streaming-video-principales-mexico/>

⁹ Available on <https://www.proceso.com.mx/reportajes/2023/6/25/de-activista-de-la-4t-al-fracaso-epigmenio-ibarra-pierde-el-control-de-argos-309423.html>

In addition, the Vix+ company has kept the business model of basic and free plans, a model similar to that of Netflix. Advertising is starting to become an important factor in both companies' figures. As a result, Vix+ has stepped up its bet on live events with the transmission of Liga MX matches, and also by expanding its offer of reality shows and bioseries.

Claro-Video, the streaming platform owned by América Móvil, whose main shareholder is Carlos Slim, has decreased its presence in Mexico in recent years. In 2017, Claro-Video ranked as the second largest video-on-demand (SVoD) platform in the country, above Prime Video and below Netflix; by 2023 it ranks between eighth and ninth place, below Paramount+ whose share is 2.3%. It continues to be free of charge to subscribers who contract some telephony, cable and internet service packages from Slim's company. However, in view of regulations and new policies of the Federal Telecommunications Institute (Instituto Federal de Telecomunicaciones, IFT) in telephony services, which imply a sharing of infrastructure with the competition, América Móvil has decided to invest in Latin American countries, especially in its Brazilian unit Claro, with an amount of 7.7 billion dollars. Claro Brazil represents 114 million mobile and fixed subscriptions, including voice, video and data, and with a more stable economy than the Mexican one¹⁰.

3.3. VoD analysis in 2023: national premiere fiction and coproductions

In 2023 we observed a significant increase in national premieres on streaming platforms compared to the previous year. The increase in productions from 2022 to 2023 has been considerable: from 27 to 36 original productions, 32 of them premieres and the remaining four are second or third season series. For the first time, Vix+, owned by TelevisaUnivision, has more productions (13 premiere titles) than Netflix (10 premiere titles), although it should be noted that the premieres are both national and international if we consider the U.S. Hispanic market, where the offices of what was Univision before the merger are located. In 2022, Vix+ started in Mexico with four productions; in 2023 it increased its relevance with the offer of serialized telenovelas and premiering biographical series.

¹⁰ <https://www.eleconomista.com.mx/empresas/Slim-invertira-7700-millones-de-dolares-en-Brasil-para-fortalecer-servicios-de-Claro-20240422-0078.html>

Table 7. National fictions and coproductions on VoD during 2023

NATIONAL PREMIERE TITLES	COPRODUCTIONS
Netflix: 10 national titles 1. <i>Contra las cuerdas</i> (Series) 2. <i>El elegido</i> (Series) 3. <i>Triada</i> (Series) 4. <i>El niño</i> (Series) 5. <i>Pacto de silencio</i> (Series) 6. <i>Ojitos de huevo</i> (Series) 7. <i>La viuda de los jueves</i> (Series) 8. <i>Los casi ídolos de Bahía Colorada</i> (Series) 9. <i>Cindy La Regia</i> (Series) 10. <i>Madre de alquiler</i> (Series) Vix +: 13 national titles 11. <i>Las pelotaris 1926</i> (Series) 12. <i>Se llamaba Pedro Infante</i> (Series) 13. <i>Ella camina sola</i> (Series) 14. <i>El gallo de oro</i> (Series) 15. <i>Volver a caer</i> (Series) 16. <i>Gloria Trevi, Ellas soy yo</i> (Series) 17. <i>Isla Brava</i> (Series) 18. <i>Senda prohibida</i> (Series) 19. <i>Los artistas: primeros trazos</i> (Series) 20. <i>Cualquier parecido</i> (Series) 21. <i>El colapso</i> (Series) 22. <i>Montecristo</i> (Series) 23. <i>Noche de chicas</i> (Series) Prime Video: 3 national titles 24. <i>La cabeza de Joaquín Murrieta</i> (Series) 25. <i>De brutas, nada</i> (Season 3, Series) 26. <i>Mala fortuna</i> (Series) Disney+: 2 national titles 27. <i>Viaje al centro de la tierra</i> (Series) 28. <i>Papás por Encargo</i> (Season 2, Series) Max (HBO): 4 national titles 29. <i>Vgly</i> (Series) 30. <i>La narcosatánica</i> (Series)	Disney +: 1 title 1. <i>C.H.U.E.C.O</i> – (Series)- Argentina.

Source: Obitel Mexico.

3.4. Narrative features of VoD in 2023

Two platform companies dominated the production of original series in 2023: Vix+ and Netflix. The increase in productions from 2022 to 2023 has been considerable again compared to 2021 and 2022: from 25 to 36 original productions, 33 of them are premieres and only three are second or third season series.

The series that returned with second or third seasons belong to the comedy, drama and suspense genres. For example, *Papás por encargo* (Disney+) and *De brutas nada* (Prime Video) keep combining comedy and drama. The first one includes, in the production of each episode, music and covers of songs by iconic artists such as Luis Miguel, in the journey through Mexico as an adventure. The second series presents the scenario of living as a couple; previous seasons presented this search by the characters, where everything seems to go wrong. In the case of *Los enviados* (Paramount+), the narrative focuses on a series of murders and intrigues that two priests must solve.

There were several productions that stood out in terms of viewing in Mexico, *Madre en alquiler*, *Cindy la Regia: La serie*, and *Ojitos de Huevo* (Netflix), *Se llamaba Pedro Infante*, *Las Pelotaris 1926* (Vix+), and *Vgly* (Max). Netflix had the most-watched premiere fiction series with *Cindy la Regia: La serie*, the story of a teenage girl from a wealthy family about romances and rivalries in the high school years. The series has seven episodes and was produced by Draco Filmes for Netflix. This production is the serialized version of the famous comic book character designed by Ricardo Cucamonga and is the prequel to the movie *Cindy La Regia*, which was released in 2020 with good box office takings.

Another outstanding comedy is *Ojitos de Huevo*, produced by Perro Azul and distributed by Netflix, which is about the life of Alexis Arroyo, a blind man who aspires to become a stand-up comedian despite the obstacles of his disability and people's disbelief. *Madre en alquiler* was the most watched Argos production for Netflix, which is a 24-episode serialized telenovela of the melodrama and suspense genre. The series tells the story of an indigenous woman of modest origin who is forced to act as a surrogate mother through lies and blackmail by a powerful and unscrupulous family to protect their reputation in society.

Other productions worth mentioning are biographical series (bioseries), a format that presents the life of a famous character or artist. In 2023, Vix+'s proposal was *Se llamaba Pedro Infante*, the actor and singer considered the most recognized in Mexican cinema, and *Gloria Trevi: Ellas soy yo*. The first one is a Rubén Galindo production for TelevisaUnivision that lasted five years in development and consists of eight episodes. The series addresses the life of Pedro Infante, from his origins in his native Sinaloa to his tragic death in a plane crash. Along the way, it depicts a character who influenced the masculinity of the Mexican man, his identification with Mexico's poorest classes, the sufferings of love and the death of his daughter. *Gloria Trevi: Ellas soy yo* is the work of well-known telenovela producer Carla Estrada for TelevisaUnivision and has 50 episodes. The series premiered on Vix and a month later on Televisa's Canal de las Estrellas, where it was one of the most watched programs in 2023. The series is narrated by singer Gloria Trevi and addresses both

her artistic origins and her controversial period with Sergio Andrade, leader of a “sect” characterized by the corruption of minors and sexual abuse.

Finally, Max’s standout series is *Vgly*, a production of Exile Content Studio, Asco Media and Warner Bros. for HBO Latin America. The series tells the story of a group of young people who try to stand out in the competitive world of urban music listened to in the lower-class neighborhoods of Mexico City.

4. Interactivity and audience participation

Although Obitel analyzes television and streaming fiction, we consider that the greatest interactivity and audience participation in Mexico is not in telenovelas, but in series and reality shows. That is why we decided to report on how the audience participated in one of the programs that caused the greatest controversy and interactivity through social networks: *La Casa de los Famosos*.

4.1 *La Casa de los Famosos*

The program is very similar to the reality show *Big Brother VIP*—aired in 2000: 14 celebrities stay inside a house, equipped with a dining room, kitchen, meeting rooms, swimming pool, two bedrooms (team “hell” and team “heaven”). In the style of John de Mol’s trademark reality shows, the set is full of cameras (about 50), and 60 microphones, through which the audience could see and hear what was happening in that house. The audience was able to watch through Vix Premium what happened in the house 24 hours a day.

The star host was Galilea Montijo, for the Sunday galas and the nomination, while for the rest of the days the hosts were Odalys Ramírez, Cecilia Galiano, Mauricio Garza, and Pablo Chagra; the producer was Rosa María Noguerón. The most notable feature of the reality show was the inclusion of a trans character, represented by Wendy Guevara, influencer, belonging to the team “hell” led by Sergio Mayer (actor and politician) and Poncho de Nigris (former *Big Brother* contestant). Wendy Guevara was the winner and became the first trans woman to win a program of this kind in Mexico and the rest of Latin America, and the second worldwide¹¹.

The program was the talk of the virtual public sphere, especially because of Wendy Guevara and the rest of the *Infierno* team. The audience turned to social networks to comment and share the stories about Wendy, the fights and arguments within the reality show (evidently planned by the scriptwriters), the personalities of other contestants of the show, which made the audience get hooked on the content.

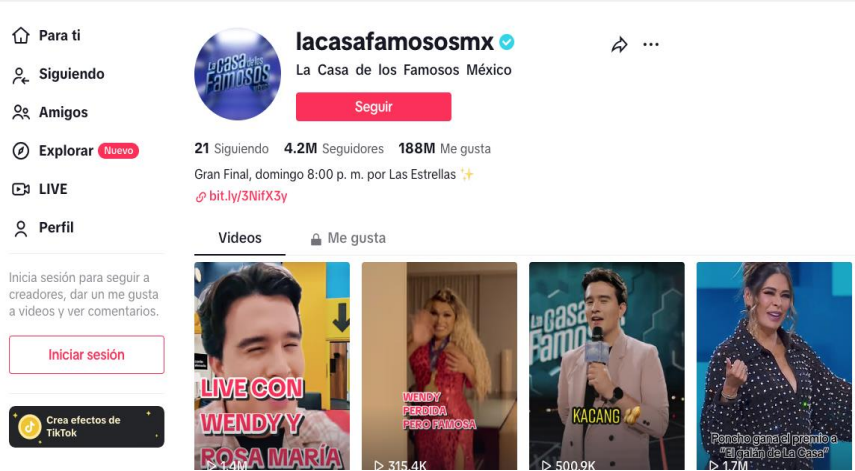
The company chose to use social networks such as Instagram and TikTok as a strategy to present the highlights of the reality show. On Instagram, the program

¹¹ <https://archivo.eluniversal.com.mx/espectaculos/54985.html>

reached more than 1,300,000 followers on its official account, while on TikTok it reached 4,100,000 followers. Therefore, this social network is where the greatest interactivity of both the production team and the audience took place.



Source: <https://www.instagram.com/lacasafamososmx/?hl=es>



Source: <https://archivo.eluniversal.com.mx/espectaculos/54985.html>

Wendy and team hell's followers were pleased with the victory. Among the comments posted on IG are the following, expressing support for the winner:



Translation of text in the image:

...Thank you, Wendy, Thank you

Territoriofit: Wendy won from start to finish. Unbelievable.

Gersonzerpa: Undoubted triumph... she won and so did her story, she won more than money and she still doesn't know it... super happy for her.

Lady_nicoleg: At last, wins someone who gives a show and not a victim

Kenore.6: Queen

Wendy Guevara lived a complicated life before the reality show and being an influencer; a life full of economic deprivation; her story was narrated by herself in the show and that was the goal: to hook the audience with her story. The influencer rose to fame when she published a post with her friend Paola Suarez, where they said they were lost in a hill. This video had thousands of views. Thanks to that she was called by Televisa to participate in the program, and this goes hand in hand with the policy (and strategy) that the network has promoted to be more inclusive, by integrating characters from the LGBT+ community in their programs. This breaks with what Televisa had avoided for decades: giving space to other communities and sexual genders in a leading role.

4.2 Ojitos de Huevo

Ojitos de Huevo (Egg eyes) is a Netflix original production in Mexico, premiering on November 17, 2023, with eight episodes. It was made by Perro Azul for Netflix, a Mexican production company with years of experience and work done for Netflix, and recently for Vix+. Its association with Netflix includes the drama/suspense ¿Quién mató a Sara? (2021-2022), and the detective series *Belascoarán* (2022), and with the Vix+ platform, the dystopian drama *El Colapso* (2023).

Ojitos de huevo tells the story of Alexis, a young blind man whose dream in life is to be a stand-up comedian. The story unfolds when Alexis and Charlie, his best friend who suffers from cerebral palsy, decide to move from Querétaro to Mexico City to become independent from their parents. Thus, with Charlie's help, Alexis seeks to become a professional stand-up comedian. The two young men will have to face the circumstances of a metropolis and society that are not yet prepared to welcome people with disabilities or different abilities, both in terms of infrastructure and disability culture. They will also have to face the vicissitudes of the domains and night scene of stand-up, a difficult and competitive profession in the field of comedy. The cast is formed by Alexis Arroyo and Kike Vázquez, who live with disabilities in real life and are professionally dedicated to stand-up. Alexis Arroyo, whose professional name is "Ojitos de huevo" defines his comedy as inclusive, and mentions that a good part of the stories portrayed in the series and in his stand-up comedy he had experienced in his life, even more, several comic routines in the series were inspired by his participation in Comedy Central programs (2015) as well as in Telehit's Stand Wars, in 2017, where he won the first place.

The promotion of *Ojitos de huevo* in media and social networks was based on the comedy associated with stereotypes about visual impairment and placing the characters as heroes in promotional videos broadcast on X, YouTube, Instagram, and Facebook. A comedy series that challenges what is politically correct regarding functional diversity.



Translation of text in the image:
"You will laugh, you will be moved"... this is how Alexis "Ojitos de huevo" reacted to your comments on the trailer of the new series 'Ojitos de huevo' available on November 17th.

Source: <https://twitter.com/NetflixLAT/status/1722662546073608505>

Another promotional strategy for the premiere was to use Alexis’ humor: the “laughing at oneself” kind of humor, and learning to accept oneself, in the face of the negative moods and low self-esteem.



Translation of text in the image:

Netflix Latinoamérica: Eyes wide open, “Ojitos de huevo” arrives on November 17th

Gabo Montiel: I hadn’t seen the trouble you were making, you crazy @ojitosdehuevo. I mean, you didn’t either, haha, but what a cool thing to do. #TheBlindManInTheStadium

(On the yellow sign) This referee is more blind than me

Source: <https://twitter.com/NetflixLAT/status/1721032845638979989>

The audience of *Ojitos de huevo* expressed their appreciation to the series for addressing the issue of functional diversity. The audiences with disabilities identified with the characters and situations.

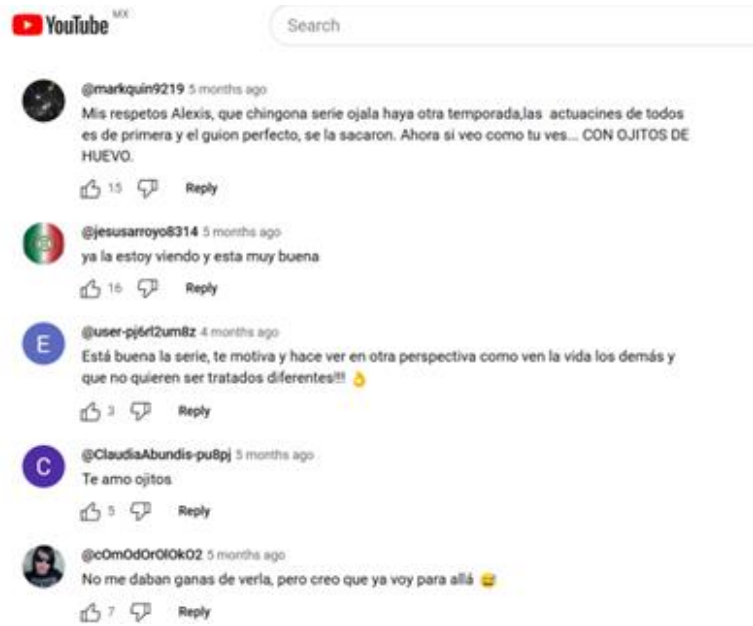


Translation of text in the image:

AtomicJorge: Hello, I surfed a disease with many complications, I was more than 10 months in the Guillain Barré hospital, you have helped me to make this new stage of my life more pleasant, thank you, I love you. From: Jorge “Ivory statue”.

Source: <https://twitter.com/atomicjorge/status/1754954688116535509>

The topic of visual impairment led to active participation in social networks, with most users expressing their respect for the comedian Alexis Arroyo.



Translation of text in the image:

Markoquin9219: My respects, Alexis, what a great series, I hope there will be another season, everyone’s performances are top notch, and the script is perfect. Now I see as you see... with ojitos de huevo.

Jesusarroyo8314: I am already watching it and it is very good.

User-pjdel2um8z: It's a good series, it motivates you and makes you see from another perspective, how others live and that they don't want to be treated differently!!!

Claudia-Abundis-pu8pj: I love you, ojitos

cOmOdOrOIOKO2: I didn't feel like seeing it, but I think I'm on my way there.

Source: YouTube <https://www.youtube.com/watch?v=bFzswYR-XE8>

In the comments, users of these social networks pointed out the relevance of “knowing other perspectives” and reflecting on “how they do not want to be treated differently”. They also emphasized the importance of the series as an example of the non-stereotypical representation of people with disabilities, on the contrary, they commented their liking for the voluntary mockery of stereotypes, they are “an example to follow”.

5. Highlights of the year 2023

A significant aspect for 2023 is the increasingly strong inclusion in the narrative of the gender perspective and diverse groups of the LGBTQ+ community. As we have mentioned in previous years, the issue of gender violence has been increasingly present in Mexican telenovelas, but also in streaming. The series *Vencer* (Overcoming), which until 2023 has five productions (*Vencer el Miedo*, *Vencer el Desamor*, *Vencer el Pasado*, *Vencer la Ausencia*, *Vencer la Culpa*) and has not only marked an important change in the way women are represented on screen, but also LGBTQ+ groups. This year, in *Vencer la Culpa* (Overcoming guilt), a trans character was the central theme of the story. *Gloria Trevi: Ellas Soy Yo* is a bioseries about the life of the singer who was accused of kidnapping, sexual abuse and human trafficking at the beginning of the new millennium. The series, aired by Vix and El Canal de las Estrellas, tells the story from the singer's point of view. As they have done in *Vencer*, also in this bioseries, a campaign was included at the end of each chapter for people who suffer any kind of harassment, bullying or problems exposed in the fiction to denounce and receive psychological help. Vix has also presented us with series that address current women's issues and how they are solved, as well as the representation of gender equality and violence against women in other times, such is the case of *Las Pelotaris 1926*. An independent production company, Argos Media, which has produced for Netflix, but also for Vix and other platforms, has decided to create and produce content with a gender perspective. Undoubtedly, this perspective is very strong in Mexican fiction.

La Rosa de Guadalupe once again occupies the first place in terms of audience preferences for broadcast television. We also observe that the Marian element continues to be very present in Mexican narratives. Therefore, it continues to stand out as a central theme every year, since 2008, in Mexican fiction.

Se llamaba Pedro Infante, from the Vix+ platform, strengthens the format of the bioseries of the idols of other eras in Mexico. This is the first production about the life of Pedro Infante, the great icon of Mexican popular culture who lives on in the collective memory of several generations. His permanence and mythical status were largely due to Mexican television and its Sunday programming, where grandparents, parents, and grandchildren would gather to watch his movies and listen to his songs. This bioseries depicts his life, from his rise to the top of the golden age of Mexican cinema to his tragic death in a plane crash. Beyond the production and the narrative, in this series one can still contemplate the keys to Mexicanness and culture, as Carlos Monsiváis said when he wrote about this actor and singer.

6. Topic of the year: Gender Violence and Inclusion in Mexican fiction narratives

Here we focus on analyzing the narratives in fiction presented in 2023. What do the stories say about ourselves, do they have anything to do with what is happening in the country's immediate environment, and what aspects stand out in the narratives about our history and identity?

Mexican telenovelas have a long history of productions since the very first telenovela aired in 1958 (*Senda Prohibida*). It has been 65 years of a trajectory in which hundreds of stories have been told, characters, stereotypes have been built, beliefs have been reinforced; telenovelas have served to reproduce the patriarchal system in which we live, by normalizing what it is to be a woman, what it is to be a man, and the beliefs that dominate (and have controlled) us as a nation.

In a context in which violence against women and the gender gap seem to be a permanent problem in Mexico and many other countries, 2023 left us a series of fictions in which female empowerment has remained as a central theme, as we have been discussing in previous paragraphs. We observed this characteristic in the fictions of 2023, so we decided to present an analysis (albeit brief) of some of the characteristics of the narratives in Mexican fiction, both in broadcast television and streaming platforms.

Both national television and VoD production companies have found a representational niche that not only allows them to frame the debate around gender violence, but also to provide alternative narratives that complement the debate through topics of female interest: diseases such as breast cancer, taboos around menstruation, trafficking in women, or even female transgender characters, for example.

The selection of relevant fictions to present an analysis for the topic of the year included productions of broadcast television, VoD platforms and international co-productions, including *Las Pelotaris 1926* (TelevisaUnivision / Vix, The Mediapro Studio, 2023), *El Niñero* (Netflix, La Granja TV, 2023), *El Amor Invencible* (TelevisaUnivision, 2023) and *Vencer la Culpa* (TelevisaUnivision, 2023). In these, the common factor is the thematic centrality of what we could call “female empowerment”.

The narrative of *Vencer la Culpa*, part of the *Vencer* franchise, focuses on problems related to being a woman, and puts guilt at the center of women’s lives to address, through four characters, the difficult relationships with children, full of claims to motherhood, marital violence, parental control over the relationships of daughters and the pressures to meet social expectations.

On the other hand, revenge is the narrative’s main driver of *El Amor Invencible*. Leona Bravo seeks to avenge the death of her children at the hands of a powerful transnational beer businessman. In search of redress, she finds independence, overcomes the humiliations of class and gender, and becomes a seeker of justice who frees women from a white slavery gang. Together with *Las Pelotaris 1926*, these are the fictions where the idea of empowerment goes hand in hand with that of violence. Through violent female characters such as Leona Bravo or Idoia, the productions leave open a path towards financial independence, the overcoming of gender violence, the restitution of lost motherhood or the control of one’s own body through the treatment of taboos such as birth control or menstruation.

Because of being a period fiction, *Las Pelotaris 1926* allows us to compare one period with the other regarding specific themes such as marriage of convenience, homosexuality, lesbianism, abortion, the gap between social classes and their intersection with gender. The narrative resources to make temporal replays, such as flashback or temporal markers, make memory and the location of the audience in the temporal course play a fundamental role in the narrative. These resources are also used in *El Amor Invencible* and *Vencer la Culpa*, and seem to maintain a trend, increasingly visible in streaming platforms, of using the past as a hook for the audience, the narrative and a series of values associated with diverse pasts.

In a sitcom format, *El Niñero* focuses on the story of a successful woman who, requiring a nanny for her children while trying to become president of the family business in spite of all the obstacles placed by men, including her father, hires a male nanny, of peasant origin. The series again associates women’s empowerment with financial success, and along the way, various “funny” obstacles allow us to identify the class and gender gaps, the difficulties of women’s professional success and single motherhood, and, on the other hand, the prejudices regarding masculinity in the care of children.

All these plots contribute to the topic of the year from different perspectives that are built on the meshing of diverse narrative resources. But one is evident, as men-

tioned above, the link between the central theme and the management of diegetic time, between past and present of the plot or between past and present of the audience. Here we will address some of the obvious resources. First, the narrative structure of three of the four cases analyzed includes time jumps. As mentioned above, the use of flashback and flashforward, accompanied by visual resources such as turning the screen to black and white or using transition markers, support the emphasis on certain themes through the tracing of their origin in the past. Guilt, revenge or violence have a causality that arises from a milestone in time. Thus, while the past becomes a cause, the diegetic present becomes a solution, placing audiences in a replay of memories that are activated through national or international events (the mention of the Cristero War in the context of *Las Pelotaris 1926*, for example), emotional memories in the national audience (like cooking fried fish to eat it in front of the Pacific coast in *El Amor Invencible*) or emotional memories in the national audience (such as cooking fried fish to eat off the Pacific coast in *El Amor Invencible*) or recognizable places (such as Mexico City in *Vencer la Culpa*), and which are linked to the specific reasons for revenge, guilt or violence. Although in the case of *El Niñero* this does not happen, it is important to note that these jumps are more between spaces, countryside/city, to highlight the character's origin and the contrast of social classes.



Source: Google images.

Jumps in time sometimes go along with markers. Unlike previous television fiction in Mexico, the current trend privileges the location of stories in space, giving a certain idea of context. For this purpose, literal space/time markers are essential (recurrent in cases such as *Las Pelotaris 1926*, where the jump between stories is constantly distinguished through signs that indicate the location in Mexico City or the Basque Country) or space markers (the use of recognizable public spaces in Guadalajara, Mexico, in *El Niñero*, for example); besides the use of costumes that provide temporal context.

All these elements add up to create a sense of transparency in the stories they tell, of lack of mediation between the audience's time and that of the plot, allowing identification with the central theme of female empowerment in a context of gender inequality that extends to the present, which is materialized in the constant obstacles that men impose on women in the plots of the different fictions analyzed.

These oppositions, which mark the rhythm of the empowerment process, are evidenced in clear identities. National fiction, despite the influence of new narrative strategies driven by North American series, maintains melodrama as the privileged genre to build characters. In this selection of 2023 successful productions, it is possible to note essential class oppositions, which mark the dynamics of the distance between genres and the obstacles that the protagonists must face. Thus, characters such as Gabriel (peasant) and Jimena (businesswoman) in *El Niñero* or Leona Bravo (lower class) and Gael Torrenegro (successful businessman) in *El Amor Invencible*, create identity oppositions that make evident the tensions faced by the protagonist in her transformation process. In this case, given the central theme that brings together the different productions, it is evident that the category of class intersects with that of gender; although more complex narratives are a possibility in the new formats of national television, these types of associations are kept, having, in a certain sense, flat identities that only become more complex depending on the obstacles faced by characters.

However, despite this resource of easy connection with the audience, characters are included (as it was already being done) disruptive in terms of identity. Itzi, a Spanish lesbian pelotari who marries her gay Mexican best friend. This type of identities allows to reinforce secondary plots linked to the central one, in this case the gender inequalities happening in their temporal context, despite being two members of the elites of their respective countries. Similarly, characters such as Dulce in *Vencer la Culpa*, a trans girl who must face the rejection of her own father, allow us to put on the table questions about paternity in the current context.

Finally, in terms of character building, it should be noted the innovative inclusion of Ro in *Vencer la Culpa*, a character created with artificial intelligence that appears in capsules during the development of the plot, strengthening the explicitly anti-machismo message of the series.

On the other hand, it would be worth noting that, in tune with fiction productions in the world, created not only for export but also for their permanent presence in the digital cloud, available to transnational audiences, national fictions include marks of transnationalism in the plots. It is not only about shared formats and genres, but also about plots that take place in multiple national spaces, as in the case of *Las Pelotaris 1926*, which takes place in Mexico and Spain, or phenomena that incorporate the transnational element in the central theme itself, as in the case of white slavery in *El Amor Invencible*. On the other hand, the inclusion of actors of

diverse origins (often without hiding national accents) and of different age groups, who incorporate a transnational language with words such as: dude, date, bro, etc. (spoken in English), leave marks of the relationship between the production and potential transnational audiences.

As can be seen, the narratives in Mexican fiction are evolving, representing more and more problematic issues according to reality, although without leaving aside romantic love—Televisa's characteristic stamp. We also observe that the bet for including transnational themes and characters is growing. This, we understand, is a strategy to reach audiences that only consume audiovisual content via the Internet. Undoubtedly, narratives are evolving, as well as the formats and the way of narrating and consuming stories.

Closing: what's next?

We believe that Netflix does have a strong competitor in Mexico with Vix. This platform is positioning itself more and more in the country, obtaining more subscribers with its special promotions (7 million subscriptions and 40 million unique users in its free version¹²) compared to Netflix's 10 million. We anticipate that eventually subscriptions will even out between both platforms, but Vix in its free version will undoubtedly have more unique users.

The consequences of the U.S. Hollywood screenwriters' strike on the Mexican audiovisual industry will be seen in the coming years. One strategy of U.S. film and television production companies was to work with Mexican screenwriters and even move some series projects to Mexico to lower their production costs, on a smaller scale. In 2023, this was the case of Netflix, HBO and other distributors, who, faced with salary pressures from their screenwriters, chose to hire Mexican creative and technical personnel who were not unionized in the United States, and with lower salaries. Likewise, U.S. audiovisual production will seek tax incentives to work in Mexico and thus globalize the production market—to the detriment of U.S. screenwriters.

¹² <https://expansion.mx/empresas/2023/11/01/estrategia-vix-para-incrementar-suscripciones-premium>

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PORTUGAL DIFFERENT DEMOGRAPHICS AND VIEWING PATTERNS, THE SAME OLD TELEVISION¹

Authors:

Catarina Duff Burnay (<https://orcid.org/0000-0001-7730-1707>)

Pedro Lopes (<https://orcid.org/0000-0002-9283-6117>)

Marta Neves de Sousa (<https://orcid.org/0000-0002-8358-3189>)

João Félix (<https://orcid.org/0000-0002-3433-2877>)

Ana Lúcia Carvalho (<https://orcid.org/0000-0002-3942-6688>)

Introduction

Different demographics and viewing patterns, the same old television. There is an observable current trend of fiction programs migrating from the traditional linear medium to streaming platforms. This model enables new forms of consumption, but also the possibility of extending the content lifespan, with alternative profitability models and a kind of viewing freedom that doesn't require the traditional curation practices of programming directors. In the era of broadcast television, consumption was governed by fixed schedules and the limited availability of channels. Families used to gather to watch programs that were airing at that moment, creating a collective experience. The rise of cable has brought channel specialization, segmented by genres, but still keeping audiences dependent on the programming slots defined by schedulers. Platforms compete to create new content, but it has become increasingly clear that there is a need to grow catalogues with shows that were previously aired on free-to-air television, offering new opportunities for reach and monetization. Series like *Friends* or *Suits* have found new audiences on these platforms, often reaching viewers who did not follow the original broadcasts. Similarly, platform-commissioned productions have started airing on traditional television, in search of a broader audience. This bidirectional movement shows that, irrespective of any differences in the way viewers watch the content, the integration between the two worlds has increased, with a different approach to how generations and consumption habits are managed. Millennials and Generation Z grew up in a digital environment and value flexibility and content personalization, while older generations remain loyal to certain routines, preferring the structured programming of generalist television. The future, as mentioned in the title, points to an ever growing convergence between traditional television and streaming platforms. Smart TVs enable the integration of platforms directly into their remotes with internet access,

¹ The Portuguese team would like to thank CAEM, GfK and Marktest-MediaMonitor for their cooperation in gathering and processing the necessary data.

thus creating a model that integrates free-to-air, cable, and other platforms, while streaming platforms are now releasing weekly episodes and investing in live content, such as sports events. In short, the so-called death of television has been clearly exaggerated, as it remains a constant presence in family life as one of the main sources of information, education, and entertainment, maintaining its relevance and adaptability in an increasingly digital and globalized world.

1. The Audiovisual Context of Portugal in 2023

1.1 Broadcast television in Portugal

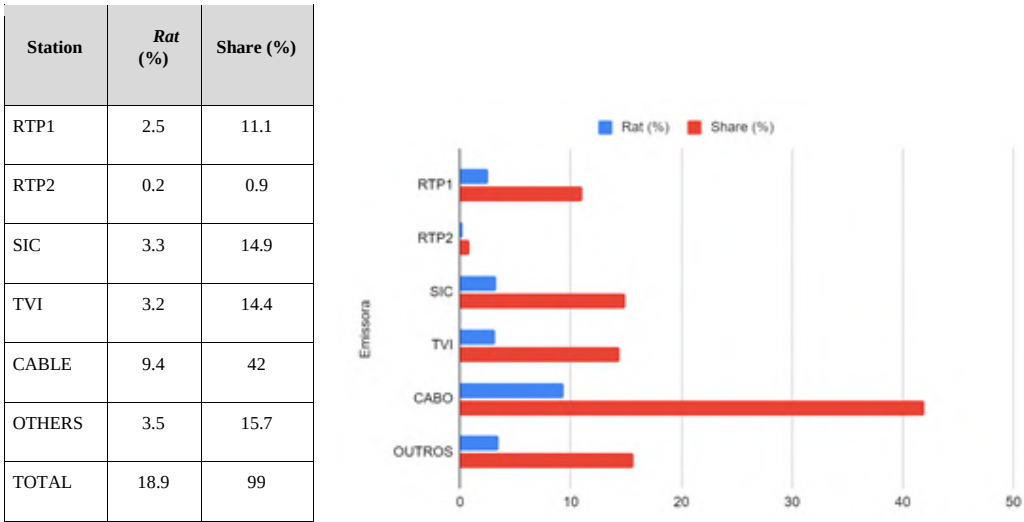
Table 1 National TV Networks/broadcast television channels in Portugal

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

The free-to-air offer has remained stable in recent years, with three stations since 1993 and a total of seven free-to-air channels since 2004. Despite discussions on the possibility of granting two new licenses for the launch of two private channels (one for news and another for sports), this has not yet materialized. The implementation process of the Digital Terrestrial Television (DTT) in Portugal was slow and late when compared to other European countries, falling short of its promised offerings to this day.

Graph 1 TV rating and share per station

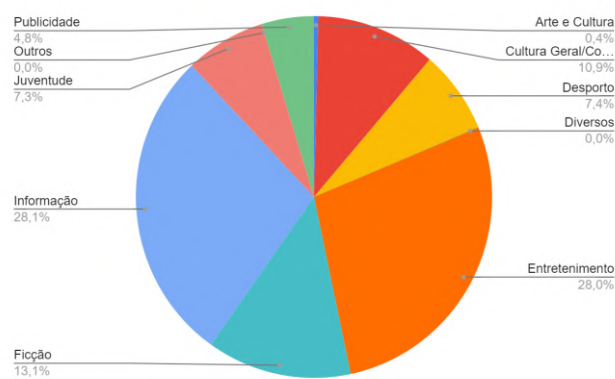


Source: Obitel Portugal/ Marktest MediaMonitor

In 2023, the public broadcaster’s first channel saw its audience ratings slightly increase on average. Meanwhile, the private channels experienced a decline when compared to 2022 (SIC dropped from a 3.7% rating to 3.3%, and TVI from 3.5% to 3.2%), with the gap between them narrowing. Paid channels, along with alternative forms of consumption, continued to rise steadily and consistently, showing the audience’s interest in a diverse range of options as well as the ability to consume content outside of pre-scheduled programming.

Graph 2: TV genres and broadcast programming hours - % (Open signal TV)

Genre	Hours	%
News	10522:09:44	28.1
Entertainment	10460:36:54	28.0
Fiction	4911:12:22	13.1
General interest/knowledge	4067:00:29	10.9
Sports	2785:35:27	7.4
Young audiences	2729:44:14	7.3
Advertisement	1778:42:22	4.8
Art and Culture	146:56:39	0.4
Other	08:29:14	0.0
Others	02:58:34	0.0
TOTAL	37407:26:02	100



Source: Obitel Portugal / Marktest MediaMonitor

The total number of hours of free-to-air television programming decreased by around 1,000 hours from 2022 to 2023. By genre, there was an increase in entertainment and fiction content, while, for example, the volume of news hours decreased. However, news content remains dominant when compared to other genres, thanks to the presence of three thematic 24-hour news channels in free-to-air broadcasting (RTP 3, SIC Notícias, and CNN), which act as extensions of news services, allowing for the development and in-depth exploration of topics and attracting audiences. Apart from this phenomenon, entertainment is the genre with the second-highest number of broadcast hours, only slightly less than news.

1.2. Paid TV and VoD Platforms in Portugal 2023

According to the annual report on Subscription Television Signal Distribution Services ² by Anacom (Autoridade Nacional de Telecomunicações), there was an increase in the number of subscription based television consumers, although this annual growth (2.1%) was the lowest since 2013.

² Anacom. Retrieved on May 30, 2023 https://www.anacom.pt/streaming/TVS_2023.pdf?contentId=1774395&field=ATTACHED_FILE

Regarding Pay-TV channels, an analysis presented by Dentsu/Carat for 0+M, among adults over 15 years old³, shows that these channels reached a market share of 42.1% (an increase of 2.1 percentage points when compared to the previous year). Among these channels, CMTV remained the leader (with a 1.5% increase in share when compared to 2022), followed by Hollywood channel with 2.5% share (an increase of 0.8% when compared to 2022), CNN Portugal with 2.2% share (a 0.9% decrease from 2022), Fox with 2.1% share (an increase of 0.2% from the previous year), and SIC Notícias with 2.0% share (a decrease of 0.3% when compared to 2022).

Table 2 Pay TV networks in Portugal

10 most watched Pay TV networks in Portugal			
TV Station	Genre	Source	Share (%)
CMTV	Generalist	Portugal	6.3
Hollywood	Fiction	Spain	2.5
CNN Portugal	News	USA	2.2
Fox	Fiction	USA	2.1
SIC Notícias	News	Portugal	2.0
TVI Reality	Entertainment	Portugal	1.7
Fox Movies Portugal	Fiction	USA	1.6
Globo	Generalist	Brazil	1.3
TVI Ficção	Fiction	Portugal	1.3
Fox Life	Fiction	USA	1.2

Source: Obitel Portugal

Table 2 shows TOP 10 for paid television in 2023, with none of them premiering national fiction this year. Comparatively to the 2022 TOP 10, there has been a slight shift in consumption preferences, with an increase in the consumption of fiction channels, and the channel TVI Ficção entering the TOP 10.

As for VoD platforms in Portugal, according to Martest’s BStream – Barómetro de Plataformas *Streaming*⁴, 49.7% of Portuguese people use streaming platforms (a 5.6% increase when compared to 2022), and 33.4% of the Portuguese population over 15 years old, residing in mainland Portugal, subscribes to at least one such service.

The same study indicates that Netflix remains the market leader in streaming, being subscribed by almost 77.6% of the respondents, followed by Disney+ with 56.5%, HBO Max (WarnerMedia) with 50.6%, Prime Video with 50.4%, and NOS Play with 47.1%.

³ Eco Sapo. Retrieved on May 30, 2023 <https://eco.sapo.pt/2024/01/03/sic-e-tvi-separadas-por-cinco-decimas-em-2023/>
⁴ “Netflix perdeu utilizadores e assinantes em Portugal desde o início do ano”. Retrieved on May 30, 2024 <https://www.publico.pt/2023/06/01/culturaipsilon/noticia/estudo-netflix-perdeu-utilizadores-assinantes-portugal-desde-inicio-ano-2051814>

RTP Play (associated with the public free-to-air television channel RTP) remains the only platform belonging to a national public organization that does not offer paid subscription services.

1.3. Sources of financing for the national audiovisual sector

In 2023, the landscape of advertising investment in the audiovisual sector maintained a strong focus on television, with a 22% growth when compared to the previous year. A remarkable 90.3% of total advertising investment was directed towards television, with the largest investors allocating 94.4% of their advertising budgets to this medium⁵. This traditional concentration demonstrates the continued confidence in generalist television's ability to reach a broad and diverse audience, thus solidifying it as a strong platform for long reaching advertising campaigns. Additionally, product placement and soft sponsoring continued to play a crucial role in fiction content, particularly as a way to expand advertising space within the content itself.

It's also noteworthy that streaming platforms have increased their investment in national fiction, partly to comply with regulations in this regard. This commitment has been reflected in the production of national content through co-productions with free-to-air channels, thus contributing to the diversification and strengthening of the audiovisual sector. Moreover, the presence of Portuguese productions on global platforms has increased the visibility of national content.

In terms of government support, the Instituto do Cinema e do Audiovisual (ICA) managed to increase the funding planned for 2023 by approximately 6.75 million Euro, reaching a total of 29.65 million Euro in support⁶. This significant increase was made possible thanks to additional funds raised from digital media taxes. With a more robust budget, the ICA was able to extend its support to a wider variety of projects, from feature films and documentaries to television series and multimedia works, thus contributing to a more dynamic and resilient audiovisual ecosystem.

On the other hand, the Tourism and Cinema Support Fund (FATC) was extended until 2026, with an initial allocation of 30 million Euro and annual increments of up to 14 million Euro. The success of this fund, which aims to attract international film and television productions, has been evident, as applications consistently exceed the planned allocations⁷.

At the European level, programs such as MEDIA (Creative Europe) and IBERMEDIA continued to foster cultural development by providing the usual financial support to various audiovisual projects. These programs have been essential for

⁵ Marktest. Retrieved on June 14, 2024: <https://www.marktest.com/wap/a/n/id~2a7c.aspx>

⁶ Plano estratégico 2024-2028 para o ica, i.p. e a sua ação no setor do cinema e do Audiovisual. Retrieved on June 14, 2024: https://ica-ip.pt/fotos/editor2/2024plano_estrategico_plurianual_ica.pdf

⁷ Retrieved on June 14, 1024: <https://observador.pt/2023/12/29/fundo-de-apoio-ao-turismo-e-ao-cinema-deixa-de-ter-teto-maximo-de-50-milhoes-de-euros/>. Retrieved on June 14, 1024: <https://observador.pt/2023/12/29/fundo-de-apoio-ao-turismo-e-ao-cinema-deixa-de-ter-teto-maximo-de-50-milhoes-de-euros/>

international cooperation and the growth of the creative industries in Europe, particularly in countries with smaller industries, as they benefit from specific funding for their development.

1.4. Communication Policies

In 2023, there was a consolidation of policies initiated in previous years aimed at strengthening the national industry.

As anticipated in 2022, the process of integrating the Portugal Film Commission (PFC) into the structure of the Instituto do Cinema e Audiovisual (ICA) was completed, with the PFC now operating under ICA's direct management. This move aimed to increase efficiency and transparency in the application procedures for the Tourism and Cinema Support Fund, boosting Portugal's competitiveness as a destination for international productions⁸.

Regarding streaming platforms, the implementation of a broadcast tax on advertising, not only on these platforms but also on online media such as YouTube, generated significant revenue in 2023. This helped align the tax revenues from online media more closely with those from traditional television, addressing the imbalance that existed in terms of advertising taxes⁹. Additionally, streaming platforms were required to give greater prominence to independent European productions spoken in Portuguese, a measure aimed at both protecting local culture and encouraging national independent production. This requirement not only increased the visibility of Portuguese productions but also encouraged streaming platforms to invest more in national content.

Finally, the Commission for the drafting of the white paper on public radio and television service, established at the end of 2022, presented its final report in May 2023. This detailed document analysed the evolution of the Portuguese audiovisual sector over recent decades, highlighting current challenges and proposing strategies for the future. Among the recommendations were the need to modernize RTP's technological and organizational infrastructure and to promote greater inclusion of innovative digital content to keep pace with new consumption habits¹⁰.

⁸ "Governo consolida Portugal Film Commission, abre duas fases de candidaturas em 2023 e garante continuidade do sistema até 2026". Retrieved on June 14, 2024: <https://www.portugal.gov.pt/pt/gc23/comunicacao/noticia?i=governo-consolida-portugal-film-comission-abre-duas-fases-de-candidaturas-em-2023-e-garante-continuidade-do-sistema-ate-2026>

⁹ "Taxas cobradas a sites como o YouTube renderam ao Estado 7,5 milhões em 2023". Retrieved on June 14, 2024: <https://www.publico.pt/2024/03/27/culturaipilon/noticia/taxas-cobradas-sites-youtube-renderam-estado-75-milhoes-2023-2084920>

¹⁰ *Livro Branco do serviço público de rádio e de televisão*. Retrieved on June 14, 2024: "<https://www.portugal.gov.pt/download-ficheiros/ficheiro.aspx?v=%3d%3dBQAAAB%2bLCAAAAAAABAAzNDY3MQYakFAjn-QUAAAA%3d>"

1.5. Digital and mobile connectivity infrastructure

The National Communications Authority (Anacom) publishes an annual comprehensive report on the evolution of the communications sector in Portugal, which includes digital connectivity, television consumption and electronic communications services on which audiovisual media rely. According to this report, in 2023, the number of subscription television subscribers reached 4.6 million, marking a 2.1% growth compared to the previous year, though this was the lowest rate of growth since 2013¹¹. Similarly, there was a slowdown in the adoption of fibre optic technology, which, despite a 7.2% growth over the previous year, represents the lowest growth rate since its implementation in 2007.

Regarding ISPs (Internet Service Providers), MEO continued to lead the market, holding a 41.5% share in 2023, a slight increase of 0.5% when compared to the previous year. NOS maintained the second position with 36.4% of subscription television subscribers, although it lost 0.7%. Vodafone followed with 19.2% of subscribers, registering a growth of 0.4%. NOWO saw its market share decrease to 2.7%, a drop of 0.2% from the previous year. Subscription television services continued to dominate the market, with 88% of households using this type of service. Meanwhile, the number of households with exclusive access to Digital Terrestrial Television (DTT) continued to decline, standing at 8% in 2023.

In terms of mobile connectivity, LTE (Long Term Evolution) coverage in Portugal reached over 99% of the population, with the main operators (MEO, NOS, and Vodafone) ensuring widespread mobile broadband service coverage.

¹¹ “O Sector das Comunicações em 2023”. Retrieved on June 14, 2024: https://anacom.pt/streaming/SectorDas-Comunicacoes2023.pdf?contentId=1778182&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 2023 (national and foreign under the scope of Obitel and co-productions)

PREMIERING NATIONAL TITLES– 40 RTP1 – 19 <i>A Hora da Liberdade (telefilm)</i> <i>Abandonados (series)</i> <i>Ao Largo (series)</i> <i>Braga (series)</i> <i>Cavalos de Corrida (series)</i> <i>Conta-me como Foi (series)</i> <i>Curral de Moinas - Os Banqueiros do Povo (series)</i> <i>Emília (series)</i> <i>Glória (series)</i> <i>Há-de haver uma lei (telefilm)</i> <i>Histórias da Montanha (miniseries)</i> <i>Jogos de engano (telefilm)</i> <i>Km224: a série (series)</i> <i>Lusitania (miniseries)</i> <i>O Crime do Padre Amaro (miniseries)</i> <i>O Natal do Bruno Aleixo (tminiseries)</i> <i>O Pio dos Mochos (telefilm)</i> <i>Salgueiro Maia - O Implicado (miniseries)</i> <i>Serpentina (telefilm)</i> RTP2 – 1 <i>Regresso a Itaca (series)</i> SIC – 10 <i>A Casa de Aurora (sitcom)</i> <i>Flor sem tempo (telenovela)</i> <i>Lucia - A guardiã do segredo (miniseries)</i> <i>Marco Paulo: a história da minha vida (miniseries)</i> <i>O Clube (series)</i> <i>Os Eleitos (series)</i> <i>Papel Principal (telenovela)</i> <i>Patrões Fora (sitcom)</i> <i>Por Ti (telenovela)</i> <i>Sangue Oculto (telenovela)</i> TVI – 10 <i>Festa é Festa V (telenovela)</i> <i>Festa é Festa VI(telenovela)</i> <i>Festa é Festa VII - Verão (telenovela)</i> <i>Festa é Festa VIII(telenovela)</i> <i>Jacinta (telefilm)</i> <i>Morangos com Açúcar (series)</i> <i>Para Sempre (telenovela)</i> <i>Pecado (mini-series)</i> <i>Queridos Papás (telenovela)</i> <i>Quero é Viver (telenovela)</i>	PREMIERE IMPORTED TITLES – 6 SIC – 6 <i>Amor Eterno Amor (telenovela)</i> <i>Dona Flor e seus dois maridos (telenovela)</i> <i>Flor do Caribe (telenovela)</i> <i>Pantanal (telenovela)</i> <i>Travessia (telenovela)</i> <i>Um lugar ao Sol (telenovela)</i> TOTAL ORIGINAL OBITEL TITLES: 46

Source: Obitel Portugal / Marktest MediaMonitor

After a slight decline in the number of fiction titles from 2021 to 2022 (two fewer titles), 2023 saw an increase of around 39% when compared to the previous year. The diversification of formats that has characterized television fiction offerings in recent years was notable in 2023, including from private channels. SIC cross launched titles in OPTO, its own streaming platform, while TVI capitalized on the success of the telenovela *Festa é Festa* by artificially splitting it into additional seasons. As for imported titles, following the trend of the past decade, they remain largely confined to Brazilian telenovelas produced by Globo, broadcast by SIC during the early evening and late-night slots (from 11 p.m. or midnight onwards).

CHART 2. National fiction titles premiering in 2023
and their evolution over five years

Format	Titles						Hours					
	2019	2020	2021	2022	2023	Total	2019	2020	2021	2022	2023	Total
Telenovela	10	6	10	13	11	50	878:00	709:05	801:05	824:30	847:25	4060:05
Series	8	6	10	13	13	50	145:00	68:25	144:05	62:20	73:25	493:15
Mini-series	1	3	3	1	8	16	02:15:00	08:10:00	12:15:00	01:20:00	29:10	53:10
Sitcom	0	1	6	0	2	9	0:00	0:00	0:00	0:00	33:05	33:05
One-shot	0	0	0	0	0	0	0:00	01:00:00	04:00:00	0:00	0:00	05:00:00
Docudrama	0	0	0	0	0	0	0:00	0:00	0:00	0:00	0:00	0:00
Other	2	3	13	6	6	30	03:20:00	07:05:00	36:10	23:05:00	05:25:00	75:05
Total	21	19	42	33	40	155	1028:35	793:45	997:35	911:15	988:30	4719:40

Source: Obitel Portugal / Marktest MediaMonitor

Although telenovelas continue to dominate prime-time programming on free-to-air television, the past five years have shown a trend toward diversifying content, with series matching telenovelas in number (50 titles), telefilms (categorized as “other”) maintaining a steady and significant presence on screens, and miniseries gaining traction. As identified in recent annual reports, the Public Media Service has been instrumental in revitalizing the market by investing in independent national productions and short-form serial stories across multiple genres, actively contributing to the growth of the audiovisual sector and cultivating new audiences. Private channels, while having less room for experimentation, have also been testing different formats, typically on weekends or one day a week, breaking the standard two-to-three-telenovela lineup. SIC, which owns the paid streaming platform OPTO, has leveraged its premium catalogue by premiering shows on free-to-air TV, while TVI, in addition to offering two miniseries throughout the year, revived its iconic show *Morangos com Açúcar*, which was a huge hit between 2003 and 2012, in partnership with Amazon Prime Video. Despite this more diverse offering, the nearly 5,000 hours of fiction broadcast over the past five years are largely attributed to telenovelas, which are programmed daily during prime time. Each telenovela often consists of more than 400 episodes, with a runtime between 45 and 60 minutes per episode.

CHART 3. Fiction premièring in 2023: Countries of Origin

Country	Titles	%	Hours	%
NATIONAL (total)	40	87	988:20	78
OBITEL COUNTRIES (total)	6	13	285:15	22
Argentina	0	0	0:00	0
Brazil	6	13	0:00	0
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	0	0	0:00	0
Mexico	0	0	0:00	0
Peru	0	0	0:00	0
Portugal	40	87	988:20	78
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
Co-productions on Obitel Countries	0	0	0:00	0
TOTAL	46	100	1273:30	100

Source: Obitel Portugal / Marktest MediaMonitor

As previously noted, in 2023, the total number of national titles increased significantly compared to 2022. However, the production under the Obitel scope remained stable, both in terms of the number of titles and their origin (primarily Brazil, from TV Globo). Ibero-American fiction has almost disappeared from Portuguese screens since 2000, when private channels shifted their focus to continuous domestic production for prime-time slots. The only remaining exception has been Brazilian telenovelas, which continue to air on SIC, a channel that has maintained an agreement with Globo since its inception in 1992.

CHART 4. National and Iberian-American fiction formats aired in 2023

Format	Titles				Hours			
	National	%	Rest of Obitel	%	National	%	Rest of Obitel	%
Telenovela	11	27.5	6	100.0	847:25	85.7	11:00:00	9.5
Series	13	32.5	0	0.0	73:25	7.4	12:00:00	10.3
Mini-series	8	20.0	0	0.0	29:10	3.0	13:00:00	11.2
Sitcom	2	5.0	0	0.0	33:05	3.3	15:00:00	12.9
One-shot	0	0.0	0	0.0	0:00	0.0	16:00:00	13.8
Docudrama	0	0.0	0	0.0	0:00	0.0	17:00:00	14.7
Other	6	15.0	0	0.0	05:25:00	0.5	32:00	27.6
Total	40	100.0	6	100.0	988:30	100.0	116:00	100.0

Source: Obitel Portugal / Marktest MediaMonitor

As identified above, the number of titles in formats other than telenovelas has been growing. In 2023, series even surpassed long-running serials, thus becoming the most offered type of fiction by free-to-air channels. Miniseries (ranging from 2 to 6 episodes) and telefilms also saw significant growth, overall exceeding the number of titles in these categories when compared to the previous year.

CHART 5: 10 Most watched titles in 2023

Title		TV Station	Producer (Country)	Format/Genre	Nº ch.ep.	Time Slot	Rating	Share
1	<i>Festa é Festa</i>	TVI	Plural Entertainment (PT)	Series/Comedy	329	<i>Primetime</i>	9.8	20.7
2	<i>Marco Paulo: A história da minha vida</i>	SIC	Coral Europa (PT)	Miniseries /biopic	3	<i>Primetime</i>	8	17.2
3	<i>Amor , Eterno Amor</i>	SIC	TV Globo (BR)	Telenovela/Drama	14	<i>Acess</i>	7.7	17.7
4	<i>Sangue Oculto</i>	SIC	SP Televisão (PT)	Telenovela/Drama	208	<i>Primetime</i>	7.7	17.5
5	<i>Quero Viver</i>	TVI	Plural Entertainment (CL)	Telenovela/Drama	57	<i>Primetime</i>	6.9	17.9
6	<i>Morangos com Açúcar</i>	TVI	Casa da Criação (PT)	Series / YA	10	<i>Primetime</i>	6.8	14.4
7	<i>Queridos Papás</i>	TVI	Plural Entertainment (AR)	Telenovela/Comedy	220	<i>Primetime</i>	6.2	16.6
8	<i>Flor Sem Tempo</i>	SIC	SP Televisão (PT)	Telenovela/Drama	239	<i>Late Night</i>	5.5	17.4
9	<i>Papel Principal</i>	SIC	SP Televisão (PT)	Telenovela/Comedy	67	<i>Primetime</i>	5.4	13.1
10	<i>Curral de Moínas: Os Banqueiros do Povo</i>	RTP	Miguel Cadilhe (PT)	Miniseries/Comedy	10	<i>Primetime</i>	5.4	11.3
Total National Productions: 9				Foreign Original Scripts: 3				
90%				30%				

Source: Obitel Portugal / Marktest MediaMonitor

CHART 5a: 10 most watched national titles

Title		TV Station	Producer (Country)	Format/Genre	Nº ch.ep.	Time Slot	Rating	Share
1	<i>Festa é Festa</i>	TVI	Plural Entertainment (PT)	Series/Comedy	329	<i>Primetime</i>	9.8	20.7
2	<i>Marco Paulo: A história da minha vida</i>	SIC	Coral Europa (PT)	Miniseries/Melodrama	3	<i>Primetime</i>	8	17.2
3	<i>Sangue Oculto</i>	SIC	SP Televisão (PT)	Telenovela/Drama	208	<i>Primetime</i>	7.7	17.5
4	<i>Quero Viver</i>	TVI	Plural Entertainment (CL)	Telenovela/Drama	57	<i>Primetime</i>	6.9	17.9
5	<i>Morangos com Açúcar</i>	TVI	Casa da Criação (PT)	Series / YA	10	<i>Primetime</i>	6.8	14.4
6	<i>Queridos Papás</i>	TVI	Plural Entertainment (AR)	Telenovela/Comedy	220	<i>Primetime</i>	6.2	16.6
7	<i>Flor Sem Tempo</i>	SIC	SP Televisão (PT)	Telenovela/Drama	239	<i>Late night</i>	5.5	17.4
8	<i>Papel Principal</i>	SIC	SP Televisão (PT)	Telenovela/Comedy	67	<i>Primetime</i>	5.4	13.1
9	<i>Curral de Moinas: Os Banqueiros do Povo</i>	RTP	Miguel Cadilhe (PT)	Miniseries/Comedy	10	<i>Primetime</i>	5.4	11.3
10	<i>A Casa da Aurora</i>	SIC	SP Televisão (PT)	Sitcom/Comedy	6	<i>Primetime</i>	4.7	11.3
				Foreign Original Scripts: 2				
				20%				

Source: Obitel Portugal / Marktest MediaMonitor

Contrary to previous years, in 2023, a Brazilian production, *Amor, Eterno Amor*, reached third place in the top ten most-watched shows in Portugal. Regarding original scripts, 70% are of national origin, as shown in Table 5, with three being of international origin: *Amor, Eterno Amor* (Brazil, SIC), *Quero Viver* (Chile, TVI), and *Queridos Papás* (Argentina, TVI). TVI was the channel that relied most on adaptations of original scripts, with two titles.

In 2023, SIC had the highest number of entries in both charts, leading the rankings with five (5) titles, two (2) of which were among the most-watched by Portuguese audiences last year. TVI remains the only other channel to appear in both tables, with four (4) fiction products, thus reversing the trend of previous years when it dominated the top of the most-watched national content.

The series/telenovela *Festa é Festa*, split into seasons VI, VII - Summer and VIII, continued to captivate Portuguese audiences in 2023, occupying the top four spots in the overall ranking. Therefore, its total viewership overall was considered in the analysis of Tables 5 and 5a. It's noteworthy that, although the trend of favouring national fiction remained, foreign titles - particularly Brazilian productions - had a greater presence in the previous year. In contrast to data from other years, the Portuguese public broadcaster RTP managed to enter the top ten with the film-turned-series *Curral de Moinas: Os Banqueiros do Povo*.

In 2023, audience preferences were evenly split between series (four titles) and telenovelas (six titles), with a similar division between comedy and drama. The trend towards lighter, more relaxed content, which began in 2021, continued into 2023.

**CHART 6: Audience profile of the 10 most viewed titles:
gender, age, socioeconomic segment**

Title		TV Station	Sex %		GSE%			
			Women	Men	AB	C	D	E
1	<i>Festa é Festa</i>	TVI	62.00	38.0	11	16.5	38.8	33.7
2	<i>Marco Paulo: a história da minha vida</i>	SIC	56.7	43.3	14.4	19.9	34.6	31.1
3	<i>Sangue Oculto</i>	SIC	60.5	39.5	14.6	16.8	40.8	27.8
4	<i>Quero é Viver</i>	TVI	66.0	34.0	10.3	18.4	38	33.2
5	<i>Morangos com Açúcar</i>	TVI	61.5	38.5	9.8	18.4	42.6	29.3
6	<i>Queridos Papás</i>	TVI	63.9	36.1	10.8	16.6	40.2	32.4
7	<i>Flor Sem Tempo</i>	SIC	62.2	37.8	16.4	18.6	37.6	27.5
8	<i>Papel Principal</i>	SIC	61.8	38.2	13.9	17.1	39.6	29.3
9	<i>Curral de Moinas: Os Banqueiros do Povo</i>	RTP	52.8	47.2	19.3	17.7	31.1	31.9
10	<i>A Casa da Aurora</i>	SIC	63.7	36.3	10.9	17.9	36.2	35.0

Source: Obitel Portugal / Marktest MediaMonitor

Title		TV Station	Age %						
			04-14	15-24	25-34	35-44	45-54	55-64	65+
1	<i>Festa é Festa</i>	TVI	3.1	6.1	6.2	8.5	13.7	19.7	21.4
2	<i>Marco Paulo: a história da minha vida</i>	SIC	3.6	4.9	4.8	10.7	16.2	25.7	18.0
3	<i>Sangue Oculto</i>	SIC	4.0	7.3	5.8	10.3	16.2	20.9	21.6
4	<i>Quero é Viver</i>	TVI	3.3	5.7	6.7	8.0	15.3	22.6	18.9
5	<i>Morangos com Açúcar</i>	TVI	3.7	7.0	8.1	9.4	12.2	21.9	19.9
6	<i>Queridos Papás</i>	TVI	3.3	3.8	6.0	7.5	13.4	25.1	21.9
7	<i>Flor Sem Tempo</i>	SIC	3.0	5.7	5.3	10.8	16.2	22.1	22.9
8	<i>Papel Principal</i>	SIC	2.3	5.6	6.7	9.7	16.3	20.8	20.8
9	<i>Curral de Moinas: Os Banqueiros do Povo</i>	RTP	3.0	4.7	4.4	8.7	12.3	16.2	20.7
10	<i>A Casa da Aurora</i>	SIC	2.4	3.1	8.4	8.4	11.7	21.9	17.9

Source: Obitel Portugal / Marktest MediaMonitor

When analyzing the Audience Profile for 2023, it remains clear, as in previous years, that women are the primary consumers of telenovelas and series. However, the gender gap was significantly narrowed with *Marco Paulo: A História da Minha Vida* and *Curral de Moinas: Os Banqueiros do Povo*, two miniseries that were particularly well-received by male audiences. This trend may be attributed to the themes and the short duration of these miniseries, which likely appealed more to men.

In terms of socioeconomic segments, the D and E brackets are the most avid viewers of telenovelas during the prime time slot, with little variation between the top ten channels. In 2023 the miniseries *Curral de Moinas: Os Banqueiros do Povo* managed to attract a significant portion of viewers from brackets A and B (19,3%).

With respect to age groups, based on Chart 6, one can infer that viewers over 65 are the most engaged with fiction formats. Meanwhile, younger audiences were captured by *Morangos com Açúcar* (TVI), which resonated with those aged 0 to 14, and *Sangue Oculto* (SIC), which drew viewers in the 15 to 24 age group.

3. VoD Monitoring in 2023

3.1 VoD platform market in 2023

According to the BStream study – Streaming Platforms Barometer by Marktest¹², although Netflix remains the market leader for streaming services in Portugal, the

¹² Público. Retrieved on May 30, 2024 <https://www.publico.pt/2023/06/01/culturaipsilon/noticia/estudo-netflix-perdeu-utilizadores-assinantes-portugal-desde-inicio-ano-2051814>

platform experienced a 13% drop in the number of subscribers in Portugal during the first semester of 2023. While it recovered some subscribers in the following semester, it shows a 4.4% decline when compared to 2022. Still, the Top 5 for streaming platforms remains the same from the two previous years, with Netflix leading, followed by Disney+, HBO Max (WarnerMedia), Prime Video and NOS Play.

Regarding access to these platforms via telecom operators, Netflix can be accessed on corresponding channels in Vodafone and MEO, while for NOS it is necessary to download an app on the set-top box or Smart TV. Disney+ is independent of any telecommunications contract, requiring only the app to access its content. HBO Max (WarnerMedia) is available to Vodafone customers (with some operator packages including the service) and via the platform's app available on set-top boxes or Smart TVs. Prime Video can be accessed directly on MEO, Vodafone and NOS, while NOS Play is only available through NOS.

3.2. Local VoD platform offering in 2023 (national, regional within the country)

In 2023, nine (9) national streaming services were identified in Portugal: RTP Play, OPTO, TVI Player, NOS Play, FilmIn, Spamflix, Q Play, GinásticaTV, and Panda+. The first eight services were presented in OBITEL's 2021 and 2022 yearbooks.

Panda+ is a platform associated with the Panda channel, which became exclusively Portuguese in December 2022 following the channel's shutdown in Spain. It is aimed at children between the ages of 6 and 12, offering a catalog of animated series and educational entertainment programs (also available on the paid channels Panda and Panda Kids). Throughout 2023, the platform was freely accessible.

3.3 VoD Analysis in 2023: Premiering national fiction and co-productions

As shown in Chart 7, there was a decrease in the offering of national titles, with only nine premiering Portuguese titles, and just one being a co-production.

Chart 7. National and Ibero-American fictions in 2023 on VoD systems

PREMIERING NATIONAL TITLES	CO-PRODUCTIONS
RTP Play – 1 1. <i>De tanto fingir encontrei-me</i> (series) Opto – 5 1. <i>Praxx</i> (series) 2. <i>Projecto Delta</i> (series) 3. <i>Lúcia, a guardiã do segredo</i> (miniseries) 4. <i>O Clube</i> (series) 5. <i>Os Eleitos</i> (series) Netflix – 1 1. <i>Rabo de Peixe</i> (series) Prime Vídeo – 1 1. <i>Morangos com Açúcar</i> (series)	Prime Vídeo – 1 1. <i>Operação Maré Negra</i> (series – Spain, Portugal) Globoplay – 1 1. <i>Codex 632</i> (series – Portugal, Brasil)
Total: 8	Total: 2

Source: Obitel Portugal

3.4. Narrative characteristics on VoD in 2023

In 2023, eight national fiction series premièred (one less than the previous year) across four VoD platforms: OPTO launched five series, while RTP Play, Netflix, and Prime Video released one series each. These series were exclusively aired on their respective platforms, except for *Morangos com Açúcar*, which was also broadcast on TVI, and *Lúcia, a Guardiã do Segredo*, which was later aired on SIC. Two co-productions are noteworthy, one on Amazon Prime Video (*Operação Maré Negra*) and another that, even though it premièred on the public service channel, was made available on the Globoplay streaming platform a few days later with the first three episodes released at once.

De tanto fingir encontrei-me premièred in July on RTP Play, a six-episode series of 20 minutes each, produced as part of the RTPLab program. Directed at a young audience, it follows the lives of six young actors, portraying both their everyday lives and the dramatization of personal issues. The series explores themes such

as domestic violence, identity, discrimination, life choices, procrastination, and the cost of fame. It had only one season and, to date, no plans for continuation have been announced.

The OPTO series stand out for offering narratives of various genres, primarily targeting a younger audience. In January 2023, OPTO premiered the second season of *Praxx*, with six episodes released weekly. As mentioned in last year's yearbook, this series inspired by real events and follows a young woman seeking to uncover the truth behind her sister's death, which occurred in an alleged accident on a beach with other university students. This series is a young adult drama with two distinct timelines that intertwine on each episode. Its main theme focuses on university hazing practices.

Projecto Delta premiered on OPTO in March, with eight weekly episodes (each 45 minutes long). A sci-fi, mystery, and fantasy series, it tells the story of a teenage girl investigating her father's apparent suicide attempt while realizing her dreams intersect with reality, offering clues to solve the mystery that is tormenting her.

Lúcia, a Guardiã do Segredo is a three-episode miniseries that launched on OPTO on May 13, 2023, the day the Catholic community celebrates the first apparition of Our Lady of Fatima in 1917 to the three shepherd children. The miniseries is based on the story of Lúcia dos Santos, one of the "shepherds" who claimed having received multiple apparitions of the Virgin Mary. The episodes, around 45 minutes each, were released throughout May on the streaming platform.

Between September and October 2023, OPTO aired the fourth season of *O Clube*, a six-episode crime and mystery series of around 45 minutes per episode focusing on the lives of employees at a famous nightclub. This season's plot follows a police investigation involving a club customer and its consequences for the business. The series aimed at an adult audience blends crime and mystery with sex, politics and business.

Os Eleitos was the last Portuguese series to premiere on OPTO, in December 2023. The first season has 26 episodes of around 45 minutes each. It is a youth drama interwoven with mystery and crime, targeted at a young adult audience. Set in a high-performance sports centre, the series portrays the dreams of a group of young athletes striving to become the best in the world. It addresses themes such as racism, xenophobia, eating disorders, violence in relationships and marriage, gender dysphoria, and more.

Netflix released the series *Rabo de Peixe* in October 2023, its second Portuguese production. This thriller is based on real events and tells the story of a young fisherman and his group of friends who find a large amount of cocaine off the coast of Rabo de Peixe, a village in São Miguel, Azores. Their discovery draws them into a dangerous chase both by drug lord who wants it back and the police who are trying to seize it. The seven-episode series of about 45 minutes each made it to the global Top 10 of Netflix in 33 countries during its first week of release.

The last national series to première on a VoD platform was *Morangos com Açúcar*, also in October 2023. This youth drama with elements of comedy and mystery is a reboot of the original telenovela that aired on TVI from 2003 to 2012. The first season has 10 episodes of 45 minutes each and is set at the same school as the original series, now focusing on the personal and family conflicts of a new group of students. Themes such as homosexuality, polyamory, fatphobia, and the impact of social media on adolescence are explored.

4. Interactivity and Audience Participation

Regarding strategies for greater audience engagement and interactivity, what was observed in 2023 was an apparent focus on the basic offering, without much room for experimentation or innovation. The channels' efforts remained on securing anchor content (main shows at specific times) to solidify their programming schedules, without any entirely interactive products or initiatives that fostered more creative audience participation beyond promoting engagement on social media. In this area of production, we could even say there was a regression, as some transmedia attempts seen in previous years were not replicated in new productions this year.

4.1 Social Interactivity

A notable exception is SIC's transmedia strategy with the creation of a series born from the telenovela *O Papel Principal*. *Os Eleitos*, a spin-off, was released on the OPTO streaming platform on December 29, 2023. This youth series revives the storyline of the character from the original telenovela who becomes famous. In other words, *Os Eleitos* is somewhat of a russian doll of stories and characters that cross over from the *O Papel Principal* universe. This was SIC's way of capitalizing on resources allocated to the telenovela, addressing audience results, and enhancing the characters that resonated most with the public. Additionally, the sitcom *A Casa de Aurora*, a spin-off exploring the comedic core of the same telenovela, was aired on linear TV. However, the strategy fell short of expectations, as the audience was not very engaged, likely feeling lost.

The series *Morangos com Açúcar*, targeted at a younger audience, had some initiatives to enhance audience interactivity and increase fans' interest beyond real-time viewing. In October 2023, TVI launched the "Clube Morangos com Açúcar" platform, a digital experience where, for a monthly subscription (€2.99), fans could access exclusive content, perks, and follow a spin-off of the main series' protagonists' lives. With *#NaWeb*, Lucas Dutra created several short films based on the series' characters, and *Milkshake* became the section of the club where subscribers could access behind-the-scenes footage and live interactions with the cast.

4.2 Social Participation

Continuing a trend from previous years, social participation tied to national fiction titles remained confined to traditional internet spaces—clips of episodes on YouTube, video snippets of major scenes, and photos on Instagram, as well as videos on TikTok—following the conventional engagement metrics (likes, shares, and followers).

Just as with interactivity, there was very little investment by either the production side (channels) or the audience in creating complementary narratives (through memes, blogs, profiles, and other content mixes) to participate more actively with their favourite fiction products.

5. Highlight of the Year

Rabo de Peixe was Netflix's second original production in Portugal. For the first time, the streaming platform released a global report with some general audience data for the first half of 2023, revealing that the Portuguese series garnered 31.5 million hours of streaming by June of that year. Directed by the Azores-born advertising filmmaker Augusto Fraga, the project won the platform's content competition with a real-life story that had a devastating impact on the island of São Miguel. The Azores archipelago is located in the middle of the Atlantic Ocean, halfway between Europe and America, making it a stopover for all kinds of sea routes. In 2001, a storm forced a yacht to drop half a ton of cocaine, which washed ashore, forever changing the lives of the fishing community of Rabo de Peixe, one of the poorest in the region and all of Europe.

The impact can still be felt in the community to this day, having yet to recover from the consequences of what this extraordinary event brought on over 20 years ago. The series departs from a dramatic approach and instead revolves around a group of young people with few life prospects who see the situation as an opportunity to change their lives. However, what begins as an opportunity soon turns into a nightmare. The series was an international success, quickly becoming one of the most successful non-English-language series. Netflix has confirmed two more seasons, though the release date is yet to be announced.

The series fits into a global trend of serialized content offerings based on true stories and crime thriller genres, appealing to a diverse audience. Its puzzle-like structure and enigmatic approach capture the attention of viewers seeking focused entertainment, with the podcast segment also expanding.

Still in the realm of streaming, the year also saw the rise of FAST (Free Ad-Supported Streaming Television). The nature of linear television joined forces with the convenience of on-demand streaming, allowing audiences to have a lean-back

experience, which had been nearly overtaken by the proliferation of streaming platforms and their à la carte functionalities. In recent years, however, there has been growing audience fatigue with SVoD experiences due to issues such as the need to juggle multiple subscriptions, binge searching (inconsequential content searching) or constant content migration between platforms.

In March 2023, OPTO SIC launched Portugal's first FAST channel—SIC Novelas—and by 2024, it had opened two more channels (SIC Alta Definição and SIC Replay). These channels capitalize on already monetized stock content without the need for significant marketing expenses. TVI also embraced this global trend, launching a dedicated channel for the hit series *Morangos com Açúcar* on TVI Player (its own streaming platform, still lacking a robust offering of original content). This helped the series be relaunched with a renewed aesthetic and thematic approach in line with international youth content offerings.

6. Topic of the Year: “What is happening with narratives in Ibero-American television fiction?”

In a static audiovisual market such as in Portugal, finding new trends that break the pattern set by a market dominated by three major broadcasters is challenging, especially as international platforms have been slow to define an active strategy for national production. Portuguese producers currently face the issue of finding relevance and competitiveness in a globalized market that remains heavily Anglo-Saxon, though Spanish-language fiction has gained prominence. According to data made public by C21, “in the fourth quarter of 2020, the percentage of fiction orders worldwide was 67% for linear channels and 31% for VOD services, while in the fourth quarter of 2023, it was 77% and 23%, respectively.” The public perception may perhaps be the opposite, but traditional players remain fundamental to the survival of the audiovisual industry, especially outside the hegemonic USA-UK axis.

The arrival of Netflix in Portugal in 2015, followed by other international platforms, sparked anticipation about the development of the national audiovisual industry and the potential for internationalizing European productions in Portuguese. The transposition of the European directive into national legislation was a point of tension that revealed persistent fractures in the cultural and creative industries, particularly between producers focused on film and those producing television content. The former fought to ensure that financial contributions would exclusively increase funding for the Portuguese Film and Audiovisual Institute (ICA), which would then decide, via public calls, which culturally relevant projects to support and, consequently, produce. However, the television industry seemed to favour broadcasters and platforms investing directly in audience-relevant projects, revealing a clear opposition between statist and market strategies.

The ICA was expected to reach 30% financing for audiovisual works by 2018, but it remains below that obligation (28.8%), with a clear favouritism towards the cinema industry, which is still heavily reliant on this financing model and, consequently, fights against any increase of funding towards the audiovisual sector. As a result, the objective set in 2014 was transferred to the 2024-2028 Strategic Plan. However, it is worth highlighting the efforts seen in 2023: a 16.7% increase in funding for the writing and development of audiovisual works, in relation to the call where production companies with multiple projects apply, and an 8.7% increase in funding for individual works, where authors apply on their own. This increase is due to the fact that the Institute's budget was reinforced after the implementation of the AVMSD (Audiovisual Media Service Directive).

The fees paid by platforms in 2023 amounted to 7.7 million euros and an investment in national audiovisual production of around 8 million euros is expected, with this amount serving more for the acquisition of national series and films than for original production. As mentioned in the latest Audiovisual Production Sector Yearbook in Portugal, "since 2022, the number of national productions on platforms has been growing, with particular emphasis on HBO Max (over 40 titles), followed by Amazon Prime Video (around 20 titles), and finally, Netflix (more than a dozen titles)."¹³

Although the investment from the public broadcaster in series is increasing, when looking at the volume of fiction hours, national production remains focused on telenovelas, a format seen as lesser or culturally irrelevant which, in turn, receives no support, in contrast to markets that have become significant or even hegemonic, such as Turkey. Telenovelas dominate the prime time of private broadcasters and, despite the evident erosion of audiences, they remain the anchor product for that time slot. SIC and TVI collectively broadcast about 1200 hours of Portuguese soap operas per year, in contrast with the strategies of other European countries. As mentioned above, the public broadcaster RTP, in a strategy to balance the ecosystem, has been dedicated to broadcasting national series by premiering 14 new titles in the year under review, with a wide variety of genres and themes, but the number of episodes per season has been shortened, clearly influenced by platform strategies. Influence, however, works both ways. Recently, in the case of Portugal, fiction produced for generalist television, often declared obsolete, has found new audiences through Video On Demand (VOD) and Subscription Video on Demand (SVOD) services.

If we focus on the new landscape for series, when assessing the last 9 years, RTP financed and broadcast 81 titles, while platforms Max, Apple, Skyshowtime, Prime Video, and Netflix only distributed and financed two national originals, both from Reed Hastings' platform. Based on this, and with no expected change in the near future, producers' strategies will likely focus on creating co-productions that integrate

¹³ Own translation. Retrieved on <https://www.apitv.com/wp-content/uploads/2024/05/240506-ANU-ARIO-UCP-23-DIGITAL.pdf>

funding from broadcasters, platforms, distributors, and sector support funds, such as PIC Portugal¹⁴. This approach allows for risk-sharing among the different parties but leads to audience fragmentation across multiple exhibition outlets, making it less attractive to players, despite the low investment from each one. There is one other downside to this model: the time it takes from the creative development of the series to its realization, risking the content becoming diluted due to the many, sometimes contradictory, visions that need to be accommodated within a single series.

Considering all the previously discussed issues, it is safe to say that the strategies for streaming platforms are increasingly focused on acquiring national content that has already been aired by local broadcasters, finding new, younger audiences through non-linear viewing who are disconnected from traditional players' programming. The comedy *Pôr do Sol* (2021-2022) is a good example of this strategy. Its broadcast on RTP 1 had an average audience of 350,000 viewers but, as José Frago, Director of Programming at the public broadcaster, noted, "the results spike in non-linear viewings." After its free-to-air run, the series debuted on Netflix and immediately appeared in the platform's Top 10 in Portugal. "If we stick to the live airing, the results are modest, but they don't reflect the feedback we received. The last episode will be shown in cinemas, and we sold out," said producer and director Manuel Pureza¹⁵. The show's success with younger audiences led the fictional band from this comedy, Os Jesus Quisto, to perform in several venues nationwide, culminating in a performance at the NOS Alive festival in 2023, on the same day that Sam Smith headlined. Also in 2023, the feature film *Pôr do Sol, o Colar de São Cajó*, based on the series' characters, premiered and became the most-watched national film in theaters, with 118,671 viewers.¹⁶

This strategy of multi-outlet exhibition increases the longevity of series, allowing them to reach a broader audience, but this reality does not result in any significant increase in budgets for fiction, which remain very modest. In contrast to Spain, for example, these budgets have been decreasing year by year, with the average cost per episode now lower than it was fifteen years ago and, when accounting for inflation, it shows a sector struggling to survive. These problems could be mitigated by sharing rights with producers, but the fact that it is such a limited market allows for a dominant position, with all participants, even creators, being forced to give up the rights to their works and receiving no revenue from sales. Despite all the talk of a new golden age of audiovisual, peripheral markets continue to suffer from underinvestment and inequality in rights and, without a national strategy for the sector, the development of a strong and competitive audiovisual industry is at risk.

¹⁴ The reason for choosing 2015 pertains to the fact that it was in this year that Netflix became available in Portugal.

¹⁵ Statement to Agência Lusa 1.09.2022. Own translation.

¹⁶ Data by the Instituto de Cinema e Audiovisual https://ica-ip.pt/fotos/downloads/ranking_dos_filmes_nacionais_mais_vistos_2004_2024_197136659a5fed5199.pdf,

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SPAIN: THE MOST PROLIFIC YEAR FOR TV FICTION

Authors:

Charo Lacalle (<https://orcid.org/0000-0002-0024-6591>)

Beatriz Gómez (<http://orcid.org/0000-0002-0557-528X>)

Mariluz Sánchez (<https://orcid.org/0000-0002-0076-7522>)

Sara Narvaiza (<https://orcid.org/0000-0002-5092-2690>)

Javier Mateos Pérez (<https://orcid.org/0000-0003-2056-8704>)¹

Team: Rosa Ferrer, Berta Trullàs, Raquel Crisóstomo, Tatiana Hidalgo-Marí, Jesús Segarra-Saavedra, Maria Porta, Suzamara Bastos, Irene Sorrentino, Tomas Cajueiro

Introduction

Original scripted fiction has reached its historical peak in 2023 with 98 productions; a remarkable increase both in streaming platforms and linear television, despite the lower number of viewers in the free-to-air reception mode compared to recent years. The activity of the Spanish television system, characterized by the rapid succession of premieres, is reflected in the variety of formats and in the alliances between channels and platforms, which seek to monetize new investments profitable and giving free-to-air fiction a second chance. Particularly noteworthy is the significant contribution of Atresplayer and the persistence of thrillers in VoD mode despite their decline in traditional broadcasting.

1. Spain's audiovisual context in 2023

Traditional television consumption continues to decline, as does advertising investment, contrasting with the increase in the number of viewers of hybrid TV (internet, video games and DTT radio). The annual weighted audience index of the three major generalist channels (33.4%, -1.9) reaches a new historical low; while traditional pay-TV channels register a high (10.4%, +0.6) and the regional public channels obtain their best figure since 2013 (8.5%, +0.1).

¹ Javier Mateos Pérez is the author of section 6 (Theme of the year: What is happening with the narratives in Ibero-American television fiction?)

Table 1. National open television channels in Spain

Ownership	Public Stations (14)		Private Stations (10)	
State (national coverage) ²	First channel (14)	Second channel (16)	First channel (10)	Second channel (19)
	La1	La2 24H Clan Teledeporte	Antena3, Cuatro, LaSexta, Tele5	Atreseries, BEMADtv, Boing, BOM Cine, Disney Channel, Divinity, DKLSS, 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, C. Extremadura, IB3, ETB1, La 7TV, Telemadrid, TPA, TV3, TVCAN, TVG	3/24, And-TV, Esport3, ETB2, ETB3, ETB4, Galicia TV, LaOtra, SX3/33, TPA2, TV3CAT, TVG2	8Madrid, 8TV, HitTV, La7, La8, TV Mediterráneo	
TOTAL STATIONS = 24 TOTAL CHANNELS = 59				

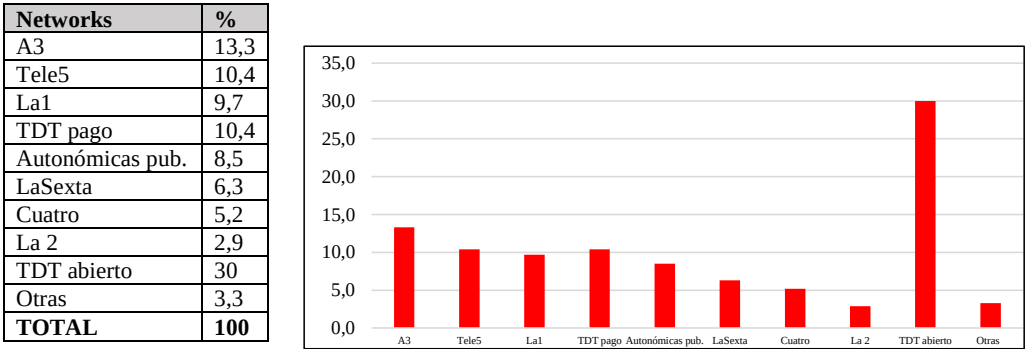
Source: Obitel España

For the second consecutive year, Antena3 is the most-watched channel (13.3%, -0.6) thanks to its leadership for 298 days of the year, every day of the week and in the afternoons (14:00-17:00), evenings (17:00-20:30) and prime time (20:30-00:00). Tele5, on the other hand, records a new annual low (10.4%, -1.9), losing almost two points in audience share. Third position once again goes to La1 (9.7%), which grows by six tenths compared to the previous year, even reaching the second position in the annual ranking between July and November. LaSexta improves its results (6.3%, +0.2) and surpasses Cuatro once again (5.2%, +0.1). La2, however, deviates from its positive trend and loses one tenth (2.9%).

The cumulative index of the thematic channels (DTT) maintains its positive trend (30%, +1.3) due to the significant audience increases of BEMADtv (1.4%, +0.7) and Energy (3.0%, +0.5), both reaching their annual peak. Neox (2%) also grows by two tenths, while Atreseries (1.8%), Disney Channel (0.7%), Divinity (2.2%), Mega (1.5%), Real Madrid TV (0.6%), Teledeportes (0.7%) and TEN (0.9%) increase by one.

² Translator 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.

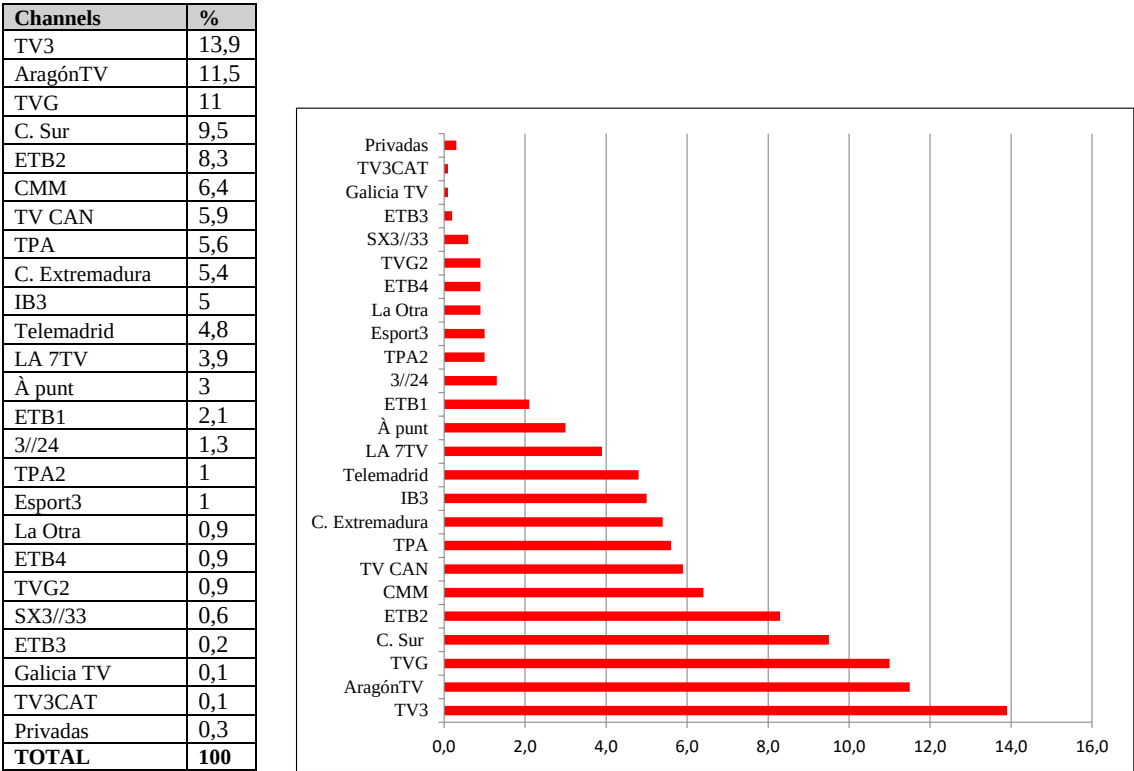
Graph 1. Share by state channels



Source: Barlovento Comunicación/KantarMedia.

Public regional channels improve their results from the previous year (8.5%, +0.1), which already constituted their best record since 2013. TV3 (13.9%, -0.2) is the channel with the highest audience share, ratifying its leadership in Catalonia for the fourteenth consecutive year. It is followed by AragónTV (11.5%, +1), which repeats its historical peak of 2013, and TVG (11%, +0.5), which achieves its best figure since 2012. Conversely, the group of private regional channels loses one tenth (0.3%), to which should be added the disappearance of two channels due to the end of broadcasts of 8TV and Verdi Classics in October.

Graph 1a. Share by regional networks

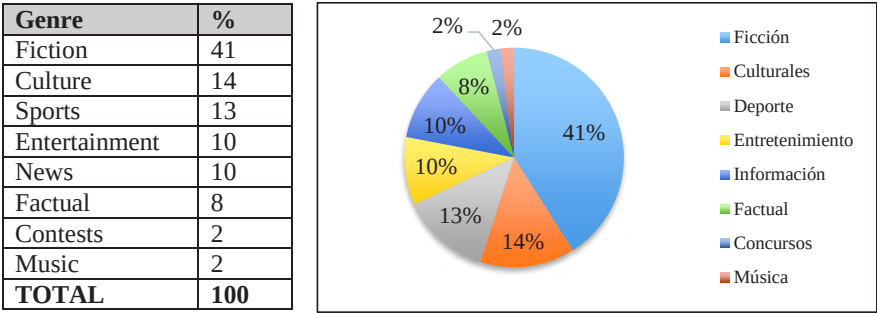


Source: Barlovento Comunicación/KantarMedia.

Atresmedia (26.8%) remains the leader among media groups despite a decrease of two tenths, followed by Mediaset (25.6%, -0.6). The audience share of both groups continues to represent more than half of the total (52.4%), but decreases by one point compared to last year. RTVE confirms its positive trend and is up six tenths (15.3%), while FORTA (Federation of Regional Radio and Television Organizations) gains one tenth (8.4%). Unidad Editorial (2.6%) and Squirell Media (2.5%) each lose one tenth.

Fiction continues to be the genre with the highest presence across all channels, with results identical to those of 2022 (41%), followed by cultural programmes (14%) and sports (13%), which also repeated the results of the previous year. Entertainment, on the other hand, loses seven points (10%) and falls to fourth place. Fiction is also the genre with the highest average audience share (38%), mainly thanks to thematic pay channels (49%).

Graph 2. Genres in TV programming



Source: Barlovento Comunicación/KantarMedia.

1.2. Pay TV and VoD platforms in Spain in 2023

DTT (Digital Terrestrial Television) continues to be the main distribution system for television content in Spain, but it decreases again compared to the previous year (71.7%, -0.6) and sets a new historical low due to the increase in viewing through pay TV (IPTV, cable, satellite and/or OTT), which also reaches a record high (28.3%, +0.6) due to the growth of the IPTV system (19%, +1.3).

The 79 traditional pay TV channels, a form of television that has been gaining viewers since 2013, maintain their positive trend and reach a new annual milestone: 10.4% (+0.6). The main novelty among the top ten most-watched pay TV channels in 2023 is the replacement of TNT by Warner TV, which has announced the inclusion of an extensive catalogue of flagship titles from the prestigious Warner Bros. Studio, thus aligning itself with the rest of Warner’s channels in Europe.

Table 2. Pay television channels in Spain

10 most watched pay TV channels in Spain			
Channel	Genre	Source	% Pay ³
LALIGA TV por M+	Soccer	Spain	3,1
DAZN LaLiga	Soccer	Spain	3,1
Fox	Fiction	USA	2,7
AXN	Fiction	USA	2,6
Warner TV	Fiction	USA	2,3
Canal Hollywood	Film	USA	2,3
Calle 13	Fiction	USA	1,9
Liga de campeones por M+	Soccer	Spain	1,8
Comedy Central	Fiction	USA	1,7
Vamos por M+	Sports	Spain	1,5

Source: Barlovento Comunicación/KantarMedia

The most important international VoD platforms in Spain are Netflix, Amazon Prime Video, Disney+, HBO Max (Warner Bros. Discovery), DAZN, Apple TV+, SkyShowtime, RakutenTV, Lionsgate+ (Starz) and Pluto TV (Paramount). The most relevant Spanish platforms are Movistar+ and Movistar+ Lite (Telefónica), RTVE Play, Atresplayer, Mitele Plus and Filmin.

1.3. Sources of financing for the audiovisual sector

Advertising investment grew by 2.4% in the first nine months of 2023. However, investment in “Television”, the second largest area after “Digital”, decreased to 1,121.4 million euros, 2.3% less than in the same period of the previous year. The advertising investment of the group of national open broadcast televisions decreased by 2.5% (1,004.1 million), thus obtaining a market share of 89.4% (-0.1%). 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, decreased by 3.4% and 3%, respectively, compared to the same period of the previous year. Nevertheless, the former reached 463.7 million; while the latter had an advertising turnover of 465.5 million, with a market share of over 40% (41.3% and 41.5% respectively). On the contrary, the investment of the regional television group increased by 3.9% (from 62.8 million), with a market share of 5.6% (+0.3). On the other hand, pay channels continued their negative trend and showed a decrease of 4.2% (52.9 million), bringing their market share to 4.7% (-0.4).⁴

³ Percentage of the channel's screen share in relation to pay television as a whole.
⁴ For more information, see <https://www.infoadex.es/home/inversion-publicitaria-crece-primeros-nueve-meses-2023/>

1.4. Communication Policies

The regional elections in May brought about important changes in the governments of the regional administrations and in the management teams of the regional television stations. For example, Radio Televisión Canaria (RTVC) and Corporación Aragonesa de Radio y Televisión (CARTV) have new general directors, as does the Balearic channel IB3. In their respective inaugurations, all have expressed their intention to launch a content platform to boost television consumption.

Corporació Catalana de Mitjans Audiovisuals (CCMA) anticipated these types of initiatives with the launch of 3Cat, the platform that integrates its various media outlets (TVC and Catalunya Ràdio). This new brand of Catalan audiovisual content aims to reformulate the classic structure of television and radio to include podcasts, videopodcasts, and exclusive television programs.

1.5. Digital and mobile connectivity infrastructure

The “Digital Decade 2023 Report”, published by the European Commission, highlights that Spain is at the forefront of fiber optic deployment in the European Union, standing 35 points above the EU average despite its large size and orography. The country leads in the adoption of ultra-fast broadband - mainly fiber optic - and in coverage of very high-capacity networks. Over the last legislature, more than 2,000 million euros have been invested in the universalisation of digital infrastructures - fixed and mobile - within the framework of the Digital Spain Agenda. Mainly aimed at closing the digital gap in ultra-fast connectivity via fiber optics and satellite and deploying 5G technology networks, with a special focus on rural areas.

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

The 98 premieres of 2023 (20 more than in 2022) mark a milestone in the production of television fiction in Spain with a figure never achieved before, comprising 34 titles for linear broadcasting (16 national and 18 regional) and 64 for streaming. Conversely, Ibero-American fiction suffers yet another year, although it offers one more title than the previous year (seven).

TVE increases its contribution with 16 titles (10 in 2022), which are also offered in streaming on RTVE Play or other OTT platforms after their premiere on La1, with some variables in the programming to enhance their profitability. For example, the release of the first two episodes of *Los Pacientes del Doctor García* on La1 and the premiere on Prime Video from the third episode onwards, or the launch on RTVE Play of the youth series *Ser o No Ser (To Be or Not To Be)*. Tele5's four titles constitute

an extraordinary event, in a year in which this channel has drastically modified its offer, reducing its reality TV shows and betting on other genres which, like fiction, have not quite taken off on its pay platform, Mitele Plus. This strategy contrasts with that of Atresmedia, which has reserved all its fictions for broadcast on Atresplayer, except for the successful daily serial *Amar Es para Siempre* (Antena3).

TABLE 1. Premiere fictions shown in 2023 on state channels

PREMIERE NATIONAL TITLES - 16	PREMIERE FOREIGN TITLES - 6
La1 1. <i>Cuéntame Cómo Pasó</i> (serie) 2. <i>Laura y Sus Misterios</i> (TV Movie) 3. <i>4 Estrellas</i> (serial) 4. <i>La Promesa</i> (serial) 5. <i>La Caza. Guadiana</i> (serie) 6. <i>Los Pacientes del Dr. García</i> (serie) 7. <i>Salón de Té la Moderna</i> (serial) 8. <i>Servir y Proteger</i> (serial) 9. <i>Fuerza de Paz</i> (serie) Tele5 10. <i>La Que Se Avecina</i> (serie) 11. <i>Entrevías</i> (serie) 12. <i>Escándalo, Relato de una Obsesión</i> (serie) 13. <i>Mía Es la Venganza</i> (serial) 14. <i>Desaparecidos</i> (serie) Antena3 15. <i>Amar Es para Siempre</i> (serial) Divinity 16. <i>Mía Es la Venganza</i> (serial)	Divinity 1. <i>Los Miserables</i> (telenovela) 2. <i>Ana de Nadie</i> (telenovela) Nova 3. <i>Quererlo Todo</i> (telenovela) 4. <i>La Mujer del Diablo</i> (telenovela) 5. <i>La Herencia</i> (telenovela) 6. <i>Vencer el Pasado</i> (telenovela) TOTAL PREMIERE TITLES: 22

Source: Obitel España

Despite the impact of streaming on the decline in linear television audiences, it should be noted that the rebroadcasting of free-to-air premieres on platforms monetizes fictions with unsatisfactory audience results, such as *Entrevías* or *Escándalo, Relato de una Obsesión* (Tele5 and Netflix). The premiere of some series on free-to-air channel and their transfer to platforms after the second or third episode, such as the comedy *La Que Se Avecina* (Tele5) or the aforementioned historical drama *Los Pacientes del Doctor García*, is another rising strategy. Moreover, OTTs’ catalogues also rescue fictions that, despite their audience success on their respective channels, were destined to fall, sooner or later, into oblivion.

As in previous years, reruns typically take on various modalities, including repetitions aimed at filling programming slots during periods of lower viewership

throughout the year. Another common strategy among Spanish channels is the combination of each new episode with a rerun; a practice systematically employed by *La Que Se Avecina* on Tele5 after airing previously on Prime Video.

The stability of regional fiction is confirmed by the 19 premieres in 2023 (one more than in 2022), among which the prominence of drama stands out, with 11 titles, to which four dramedies should be added. Unlike national premieres, fiction set in the past continues to maintain a significant presence on FORTA channels, with 13 titles, including two TV movies from TV3, *Quico Sabaté*, *Sense Destí* and *Mirò*, and one from À Punt, *L'Alqueria Blanca*. This last long-running Valencian fiction has explored the serial format of daily broadcasting throughout 2023 (season 15), until it returned to its traditional Sunday programming in October, once again transformed into a series format (season 16). Also noteworthy are the two co-productions with Portugal by Galician TVG: the drama *Faro. O Reencontro* and the thriller *Motel Valkiria*.

TABLE 1b. Premiere fictions exhibited in 2023 on regional channels

PREMIERE REGIONAL TITLES - 18	PREMIERE FOREIGN TITLES - 1
TV3 1. <i>Quico Sabaté, Sense Destí</i> (TV Movie) 2. <i>Cites Barcelona</i> (serie) 3. <i>Això No És Suècia</i> (serie) 4. <i>Bojos per Molière</i> (serie) 5. <i>Com Si Fos Ahir</i> (serial) 6. <i>Mirò</i> (Tvmovie) À Punt 7. <i>Després de Tu</i> (serie) 8. <i>L'Alqueria Blanca</i> (serial) 9. <i>L'Alqueria Blanca</i> (serie) TVG 10. <i>Saudade de Ti</i> (serial) 11. <i>Faro. O Reencontro</i> (serie) 12. <i>Artemisa</i> (serie) 13. <i>Motel Valkiria</i> (serie) IB3 14. <i>Closed Bar</i> (serie) 15. <i>Llim</i> (miniserie) ETB1 16. <i>Irabaxi Arte!</i> (serie) RTVC 17. <i>Canarias de Leyenda</i> (serie) 3cat 18. <i>La Mirada de la Fiona</i> (serie)	RTVC 1. <i>Fuego Ardiente</i> (telenovela) TOTAL REGIONAL TITLES: 19

Source: Obitel España

As for reruns, the serials *L’Alqueria Blanca* and *El Faro* continue to be rebroadcast on some regional channels (on RTVC this year), albeit intermittently. À Punt, successor to the now defunct Canal9, has also rescued some seasons of *L’Alqueria Blanca* broadcast some years ago by its predecessor. TVG offers its fictions on AGalega, the OTT of the CRTVG group; TV3 on 3Cat and ETB1 on Primeran.

As can be seen in table 2, the 16 national premieres represent a significant increase after last year’s historical low (10 titles), although competition from streaming places the open offer at a considerable distance from the last year of the previous decade (24 titles in 2019). However, even though the seven serials aired in 2023 surpass even 2019’s offer (six titles), the airtime this year (798 hours and 15 minutes) evidences the gradual decrease in both the number of chapters/episodes and the length of broadcasts.

The stabilization of the number of series since 2020 at eight titles (except for the mentioned decrease in 2022), half of those premiered in 2019 (16 series), confirms the migration of this format to streaming platforms; but also the relevance of serials in linear programming. As in previous years, the contribution of other formats of national fiction premieres remains practically negligible, with only one miniseries.

Table 2. Formats of new national fiction in 2023 and their evolution over a five-year period

Format	Titles						Hours					
	2019	2020	2021	2022	2023	Total	2019	2020	2021	2022	2023	Total
Serial	6	5	5	3	7	26	997:15	969:00	754:55	480:00	747:35	3948:45
Series	16	8	8	5	8	45	179:30	61:10	70:35	73:30	48:00	432:45
Miniseries	1	0	0	1	0	2	3:30	0:00	0:00	3:00	0:00	6:30
Tvmovie	0	0	0	1	1	2	0:00	0:00	0:00	1:30	2:40	4:10
Docudrama	1	0	0	0	0	1	14:00	0:00	0:00	0:00	0:00	14:00
Others	0	0	1	0	0	1	0:00	0:00	0:00	0:00	0:00	0:00
Total	24	13	14	10	16	77	1194:15	1030:10	825:30	558:00	798:15	4406:10

Source: Obitel España

The 19 premiere titles of regional fiction allow the total (national and regional) to overcome the steep decline of the last five years, reaching 34 premieres in 2023 (14 titles more than in 2022). The similarity between regional and national channels in programming strategies combined with streaming has expanded the space dedicated to serials, with 10 proposals that constitute the highest figure of the five-year period.

Table 2a. Formats of new national and regional fiction in 2023 and their evolution over a five-year period

Format	Titles						Hours					
	2019	2020	2021	2022	2023	Total	2019	2020	2021	2022	2023	Total
Serial	7	7	6	6	10	36	1102:15	1035:50	860:55	742:40	977:35	4719:15
Series	29	20	20	14	19	102	314:50	169:00	168:35	150:30	122:15	925:10
Miniseries	2	4	1	3	2	12	6:30	12:20	1:40	9:10	4:40	34:20
Tvmovie	3	0	3	4	3	13	4:40	0:00	4:25	6:30	6:00	21:35
Docudrama	1	0	0	0	0	1	14:00	0:00	0:00	0:00	0:00	14:00
Others	1	0	0	1	0	2	9:10	0:00	0:00	2:40	0:00	11:50
Total	43	31	30	28	34	166	1451:25	1217:10	1035:35	911:30	1110:30	5726:10

Source: Obitel España

The number of airtime of the 16 premieres of national fiction this year amounts to 798 hours and 15 minutes (558 hours in 2022), which represents 69% of the total of Ibero-American fiction. One Colombian telenovelas, another from the United States, three Mexican ones and a co-production between the latter two countries account for the remaining 31%, representing a total of 365 hours and 40 minutes of airtime.

Table 3. State fiction premieres in 2023: countries of origin

Country	Titles	%	Hours	%
NATIONAL (overall)	16	73	798:15	69
OBITEL COUNTRIES (total)	6	27	365:40	31
Argentina	0	0	0:00	0
Brazil	0	0	0:00	0
Chili	0	0	0:00	0
Colombia	1	5	42:40	4
Ecuador	0	0	0:00	0
Spain	16	73	798:15	69
US Hispanic	1	5	54:45	5
Mexico	3	14	242:15	21
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 (total)	1	5	26:00	2
National Co-productions	0	0	0:00	0
Co-productions Countries Obitel	1	5	26:00	2
TOTAL	22	100	1163:55	100

Source: Obitel España

In addition to the 34 titles of original fiction broadcasted by national and regional channels, this year also includes seven Ibero-American telenovelas, which represent 29% of the airtime (450 hours and 40 minutes) compared to 71% of the Spanish total

(1,110 hours and 29 minutes). Only one of the aforementioned soap operas features on a regional channel (RTVC): the Mexican *Fuego Ardiente*, which raises to four the number of Spanish premieres from the Aztec country, supplemented by the co-production with the United States by TelevisaUnivision, *La Mujer del Diablo*.

The FORTA channels’ offer includes in 2023 a co-production between Galician TVG and Portuguese RTP1(*Moltel Valkiria*)⁵.

Table 3a. State and regional premiere fiction in 2023: countries of origin

Country	Titles	%	Hours	%
NATIONAL (overall)	34	83	1110:30	71
OBITEL COUNTRIES (total)	7	17	450:40	29
Argentina	0	0	0:00	0
Brazil	0	0	0:00	0
Chili	0	0	0:00	0
Colombia	1	2	42:40	3
Ecuador	0	0	0:00	0
Spain	33	78	1095:30	70
US Hispanic	1	2	54:45	4
Mexico	4	10	327:15	21
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 (total)	2	7	41:00	3
National Co-productions	1	5	15:00	1
Co-productions Countries Obitel	1	2	26:00	2
TOTAL	41	100	1561:10	100

Source: Obitel España

The contribution of the seven national serials to the airtime of original fiction is extremely high (43.8%), in line with the increasing shift from series to streaming mentioned in various parts of this chapter. However, the weight of the serial format in premiere fiction increases exponentially considering that they represent 93.7% of airtime (747 hours and 35 minutes) compared to the 6% dedicated to series (48 hours). The difference in presence on schedules of both formats widens even further when considering the contribution of Obitel, as the six soap operas aired by national channels represent 100% of the time dedicated to serials (365 hours and 40 minutes).

⁵ Regarding domestic production, four FORTA channels (Televisión de Galicia, Telemadrid, Castilla La Mancha and Televisión de Asturias) as well as Canal Extremadura have co-produced this year’s *Faro. O Reencontro*. It is a *spinoff* of the serial *El Faro* (2013-2016), one of the most repeated fictions among this group of channels.

TABLE 4. Formats of national fiction and Obitel exhibited in 2023

Format	Titles				Hours			
	National	%	Other Obitel	%	National	%	Other Obitel	%
Serial	7	43,8	6	100,0	747:35	93,7	365:40	100,0
Series	8	50,0	0	0,0	48:00	6,0	0:00	0,0
Miniseries	0	0,0	0	0,0	0:00	0,0	0:00	0,0
Tvmovie	1	6,3	0	0,0	2:40	0,3	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	16	100,0	6	100,0	798:15	100,0	365:40	100,0

Source: Obitel España

The indicated proportions are significantly altered when considering the total by formats of national and regional premiere fiction, even though 88% of broadcasts correspond to the 10 serials of the total Spanish content (977 hours and 35 minutes). The contribution of the miniseries and the three TVmovies of 2023 remains very modest (0.3% and 0.5% respectively), due to their short duration.

TABLE 4a. National and regional fiction formats Obitel exhibited in 2023

Format	TITLES				HoURS			
	National	%	Other Obitel	%	National	%	Other Obitel	%
Serial	10	29,4	7	100,0	977:35	88,0	450:40	100,0
Series	20	58,8	0	0,0	123:35	11,1	0:00	0,0
Miniseries	1	2,9	0	0,0	3:20	0,3	0:00	0,0
Tvmovie	3	8,8	0	0,0	6:00	0,5	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	34	100,0	7	100,0	1110:30	100,0	450:40	100,0

Source: Obitel España

The twenty-third and final season of *Cuéntame Cómo Pasó* leads the audience ratings for national fiction with 1,405,000 viewers (13.2% share), a figure significantly lower than the 1,713,000 viewers (15.9% share) obtained by *Entrevías*, which topped the ranking in 2022. This Tele5 series, last year’s revelatory premiere, placed its third season in eighth position, with 953,000 viewers (10% share), despite the excellent reviews received by the first two seasons. The other thriller in the line-up, *La Caza Guadiana*, precedes it in seventh position (957,000 viewers and 7.6% share).

Once again, Spanish viewers’ attachment to past big hits is reflected in the second and third positions of the top 10 of 2023, occupied respectively by the two TVmovies from La1, *Laura y sus Misterios*, a spin-off of *Los Misterios de Laura* (La1, 2008-2014), and the 12th and 13th seasons of the long-running series on Antena3, *Amar Es Para Siempre*, with 1,073,000 (10.3% share) and 1,058,000 viewers (11% share)

respectively. However, the opening episode of the fourteenth season of *La Que Se Avecina* (Tele5) did not fare as well, dropping to sixth place, perhaps due to the immediate availability of the complete season on Prime Vídeo.

The success of serials is corroborated by the fourth and fifth positions of two contributions from La1 to this format: *4 Estrellas* (1,057,000 viewers and 8.4% share) and *La Promesa* (1,031,490 viewers and 11.3% share). Closing the annual ranking are the series *Escándalo, Relato de una Obsesión* (936,000 viewers and 8.1% share) and *Los Pacientes del Doctor García* (927,000 viewers and 8.0% share), an adaptation of the eponymous novel by the prematurely deceased writer Almudena Grandes.

TABLE 5. 10 National most viewed titles in 2023

	Title	Channel	Producer	Format/Genre	Chap./ep.	Time slot	Rating	Share	Thousands
1	<i>Cuéntame Cómo Pasó</i>	La1	Ganga Producciones (ES)	Serie/Drama	6	Prime time	3,0	13,2	1.405.000
2	<i>Laura y sus Misterios</i>	La1	RTVE y Veranda TV (ES)	Tvmovie/Policiáco	2	Prime time	2,3	10,3	1.073.000
3	<i>Amar Es para Siempre</i>	Antena3	Diagonal TV (ES)	Serial/Drama	251	Tarde	2,3	11,1	1.058.000
4	<i>4 Estrellas</i>	La1	RTVE y Good Mood (ES)	Serial/Comedia	134	Prime time	2,3	8,4	1.057.000
5	<i>La Promesa</i>	La1	StudioCanal, Bambú Producciones y RTVE (ES)	Serial/Drama	263	Tarde	2,2	11,3	1.031.000
6	<i>La Que Se Avecina</i>	Tele5	Contubernio Films (ES)	Serie/Comedia	1	Prime time	2,1	10,6	975.000
7	<i>La Caza. Guadiana</i>	La1	DLO Producciones	Serie/Thriller	8	Prime time	2,1	7,6	957.000
8	<i>Entrevías</i>	Tele5	Alea Media (ES)	Serie/Thriller	8	Prime time	2,1	10,0	953.000
9	<i>Escándalo, Relato de una Obsesión</i>	Tele5	RTVE y Alea Media (ES)	Serie/Thriller	8	Prime time	2,0	8,1	936.000
10	<i>Los Pacientes del Dr. García</i>	La1	Diagonal y DAPlaneta (ES)	Serie/Drama	2	Prime time	2,0	8,0	927.000
Total national productions: 10				Foreign original scripts:0					
100%				0%					

Source: Obitel España

TV3’s six premieres top an annual ranking of regional fiction are characterized by the diversity of its formats (six series, two serials and two TVmovies), to the point of the ranking is led by a TVmovie: *Quico Sabaté* (389,000 viewers and 19.5% share). Along with the success of TV3’s two biopics, the aforementioned *Quico Sabaté* and *Mirò*, about the painter Joan Mirò (207,000 viewers and 11.1% share), the most outstanding feature of this group of channels is surely the presence of the three Catalan

dramedies: *Cites Barcelona* (295. 000 viewers and 15.5% share) and *Això no és Suècia* (289,000 viewers and 14.6% share), on TV3, and *Després de Tu* (85,000 viewers and 5.3%), on À Punt. Closing the ranking are two TVG productions: the serial *Saudade de Ti* (64,000 viewers and 9.0% share) and the aforementioned series *Faro. O Reencontro* (59,000 viewers and 7.8% share), which occupy the eighth and tenth positions respectively, while À Punt’s serial *L’Alqueria Blanca* is in ninth place (63,000 viewers and 6.0% share).

TABLE 5a. 10 Regional most viewed titles in 2023

Title		Channel	Producer	Format/Genre	Chap./ep.	Time slot	Rating	Share	Thousands
1	<i>Quico Sabaté, Sense Destí</i>	TV3	Minimal Films y TV3 (ES)	TVmovie/Biopic	1	Prime time	5,2	19,5	389.000
2	<i>Cites Barcelona</i>	TV3	Arca Audiovisual (ES)	Serie/Dramedia	6	Prime time	3,9	15,5	295.000
3	<i>Això No És Suècia</i>	TV3	Nanouk Films, Funicular Films, Anagram Sweden, TVC (ES)	Serie/Dramedia	8	Prime time	3,8	14,6	289.000
4	<i>Bojos per Molière</i>	TV3	Veranda y TV3 (ES)	Serie/Drama	8	Prime time	3,3	11,7	252.000
5	<i>Com si fos ahir</i>	TV3	TVC (ES)	Serial/Drama	213	Tarde	3,1	17,7	233.000
6	<i>Mirò</i>	TV3	IB3 Televisió, ICEC, Setmàgic Audiovisual y TV3 (ES)	TVmovie/Biopic	1	Prime time	2,7	11,1	207.000
7	<i>Després de Tu</i>	À Punt	Albena Produccions y Minoria absoluta (ES)	Serie/Dramedia	18	Prime time	1,7	5,3	85.000
8	<i>Saudade de Ti</i>	TVG	Voz Audiovisual (ES)	Serial/Drama	62	Prime time	2,4	9,0	64.000
9	<i>L’Alqueria Blanca</i>	À Punt	Trivision y Zenith TV (ES)	Serial/Drama	60	Tarde	1,3	6,0	63.000
10	<i>Faro. O Reencontro</i>	TVG	Atlántida Media (ES)	Serie/Drama	10	Prime time	2,2	7,8	59.000
Total national productions: 10				Foreign original scripts: 0					
100%				0%					

Source: Obitel España

3. VoD monitoring 2023

Digital platforms continue to integrate advertising and update their prices with new rates. Regarding content, VoD focuses on incorporating diversity, especially in terms of gender, with female characters who strive to regain control of their lives, unravel police intrigues, or navigate the initiation stage to adulthood as best they can.

3.1. VoD Platform Market in 2023

The third and last wave of Barlovento Comunicación's TV-OTT Barometer in 2023 gives Prime Video (53%) the leadership of the platform ranking, followed by Netflix (46.1%), Disney+ (31%), HBO Max (23.5%) and Movistar+ (16.3%). The three waves of GECA's OTT Barometer 2023 and SigmaDos30's VOD reports for the last three months (September, October and November) confirm these same five positions. However, the third wave of the General Media Study (EGM) and the Household Panel of the National Commission of Markets and Competition (CNMC) attributes leadership to Netflix in the first half of 2023. According to the first report, Netflix is followed by Prime Video, Disney+, HBO Max and Movistar+; while the second ranking order is Prime Video, Movistar+, HBO and Disney Plus.

The "Entertainment on Demand (EoD)" study by Kantar's Worldpanel division on the Spanish streaming market indicates that Netflix lost one million users during the first quarter of 2023 as a result of its new strategy against shared accounts. However, the company still has reasons to defend its new policy: Kantar indicates that two thirds of the one million lost were not subscribers, but users using someone else's account, which represents a decrease in potential audience but not an economic loss for the company. In any case, the OTT does not seem to be afraid of losing users as long as it retains a substantial number of subscribers and has decided to implement its anti-account sharing plan worldwide.

Following in Netflix's footsteps, other platforms have also embraced advertising. In November, commercials came to Disney+, which launched its new ad-supported subscription model, months after announcing a reduction in production, and the removal of more than 50 original titles in the face of losses and a drop in subscribers in the millions. Amazon Prime Video is also on board with the inclusion of advertising and has already announced a new ad-supported fee for 2024. On the other hand, HBO Max and Apple TV have opted to increase their subscription prices (HBO Max by one euro and Apple TV+ by three).

While the established platforms are implementing different strategies to solidify their position in the market, new players are joining the Spanish SVoD scene. The latest addition has been SkyShowtime, the joint venture between Comcast and Paramount Global, which thanks to a launch offer like HBO Max - half price forever for subscribers who signed up during the launch period - gained almost one in three new subscribers in the first quarter of 2023 (32.6%), according to the aforementioned Kantar study. The first wave of GECA's OTT Barometer confirms that, after just one month of existence and thanks to its launch promotion, SkyShowtime reached 4.5% user penetration, a figure very close to that of Apple TV+ (4.8%).

3.2. Offer of local VoD platforms in 2023

Movistar+ appears in the Top 5 of the aforementioned Barlovento Comunicación and GECA reports. Atresplayer (6.4%), Movistar+ Lite (5.4%), Filmin (4.5%) and Mitele Plus (3.5%) respectively occupy the seventh, eighth, eleventh and twelfth positions in the ranking according to the last two waves of GECA's OTT Barometer.

Movistar Plus+, the Spanish leading platform, presented its renewed television service, which will no longer be available only to customers of its telephone operator as it has been until now, but will be open to the entire public in OTT mode. Atresplayer Premium, Atresmedia Televisión's exclusive content platform, was renamed Atresplayer, and it presented a new interface with important new features and content. In addition to the free content with its corresponding commercials, Atresplayer will continue to offer exclusive content through its subscription plan, which will continue to cost €4.99 per month and which now includes an advert at the start of each viewing, as Movistar Plus+ and MiTele Plus already do (in this case there are three adverts). In addition, they are launching a family plan for €7.99 a month, which will allow access to the complete catalogue for three people at the same time and without any type of advertising, and will be integrated as a channel in Prime Video thanks to the agreement with this OTT. It is a strategy that demonstrates the changes undergone by an industry that no longer only buys content from third parties, but also acquires productions from its main competitors in order to increase economic profitability, even if this sometimes means relinquishing the principle of "exclusivity" on which the business was built.

In relation to free and nationwide OTTs, RTVE Play is the platform with the highest penetration in Spanish households, according to the third wave of Barlovento Comunicación's TV-OTT Barometer and the three waves of GECA's OTT Barometer. It is followed by Atresplayer, Pluto TV and Mitele according to both barometers.

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

The 65 streaming titles released this year (50 in 2022) bear witness to the commitment to fiction of both Spanish and foreign platforms operating in Spain, in a production context characterized by the rapid succession of premieres. In fact, the renewal for a new season is becoming an exceptional event, reserved for a few series with a lot of success. For example, *Élite*, *Valeria* and *Sky Rojo* on Netflix; *El Internado*, *Las Cumbres* and the aforementioned *La Que Se Avecina* on Prime Video.

The general stabilization of the number of chapters/episodes, between six and eight per season, and the length of each episode at around 50 minutes, are also characteristics shared by the OTTs' premieres in 2023, while at the same time raising some theoretical questions about formats, precisely because of the difficulty of

distinguishing between episodes and chapters; but, above all, between series and miniseries.

The increase in premieres in 2023 is mainly due to the contribution of Atresplayer (15 in 2023 and seven in 2022), Netflix (15 in 2023 and nine in 2022) and Prime Video (12 in 2023 and six in 2022), one of which is a co-production with Portugal (*Operation Black Tide*). Movistar+ is committed to stability with the same number of titles as last year (nine). Disney+ also maintains its commitment to Spanish fiction with two titles in 2023, one of which is a co-production with the United States (*Tú También Lo Harías*). Also noteworthy are the four titles from SkyShowtime (following the departure in March of Lionsgate+) and the three contributions from Filmin, showcasing the platform's intention to enhance its own television fiction production, initially emerging as a film distributor. Starzplay contributes one title to the mix.

TABLE 7. National fictions and co-productions exhibited in 2023 on VoD systems

NATIONAL PREMIERES	PREMIERE CO-PRODUCTIONS
Prime Vídeo 1. <i>Culpa Mía</i> (Tvmovie) 2. <i>Días Mejores</i> (series) 3. <i>El Internado. Las cumbres</i> (series) 4. <i>El Pueblo</i> (series) 5. <i>Escándalo</i> (miniseries) 6. <i>Los Farad</i> (series) 7. <i>Memento Mori</i> (series) 8. <i>Romancero</i> (series) 9. <i>Sin Huellas</i> (series) 10. <i>Urban. La Vida Es Nuestra</i> (series) 11. <i>La Que Se Avecina</i> (series)	Disney+ 1. <i>Tú También Lo Harías</i> (series) Spain-USA
Atresplayer 12. <i>Entre Tierras</i> (series) 13. <i>Honor</i> (serie) 14. <i>Las Noches de Tefía</i> (series) 15. <i>Camilo Superstar</i> (series) 16. <i>Cardo</i> (series) 17. <i>Cristo y Rey</i> (series) 18. <i>Déjate Ver</i> (series) 19. <i>La Caja de Arena</i> (series) 20. <i>La Red Púrpura</i> (series) 21. <i>Los Protegidos ADN</i> (series) 22. <i>Nacho</i> (series) 23. <i>Sentimos Las Molestias</i> (series) 24. <i>UPA Next</i> (series) 25. <i>Vestidas de Azul</i> (series) 26. <i>Zorras</i> (series)	Prime Vídeo 2. <i>Operación Marea Negra</i> (series) Spain-Portugal
Disney+ 27. <i>La Chica Invisible</i> (series)	
Filmin 28. <i>B-Siders</i> (series) 29. <i>Putos Modernos</i> (sketch) 30. <i>Selftape</i> (series)	
HBO Max	

Source: Obitel España

Unlike broadcast premieres, the 25 suspense titles (thriller and detective) bear witness to the significance of this genre in the VoD catalog, aligning with international

trends particularly on Netflix, with seven of the 12 releases offered this year by the North American platform. Drama makes up the rest of this OTT's productions, as is the case with Atresplayer. Another rising trend, youth drama, is included in this latest platform with *Cardo*, *UPA Next* and *Los Protegidos* (the latter with fantasy elements), as well as the seventh season of *Élite* on Netflix, *Culpa Mía* on Prime Vídeo and the aforementioned *Ser o no Ser* on RTVE Play. The relevance of young characters in other genres, such as thrillers like *La Chica Invisible* (Disney+) or *La Chica de Nieve* (Netflix), demonstrates the OTTs' desire to capture this target audience.

3.4. Narrative features of VoD in 2023

The breadth of the offer, the constant hybridization of genres and formats and the variety of the themes addressed prevent the systematization of a set of narrative characteristics applicable only to VoD. This is because, except for serials, the rest of the fiction offered in streaming does not particularly differ from linear fiction and because of the growing interrelation between the different modes of production in a system that, with the current structure, is bound to diversify its business structure to survive. Consider, for example, the strategies adopted by free-to-air channels to maximise the impact of their premieres, such as launching one or two episodes and shifting the subsequent ones to paid platforms (see section 2). Both free-to-air fiction and VoD productions are forced to combat obsolescence in order to guarantee their continuity.

The redefinition of social class and gender relations, and the gradual inclusion of diversity in all its manifestations (sexual, cultural, origin, etc.), shape the main narrative motifs shared by most of today's Spanish fiction. Regarding general characteristics, the prominence of female characters stands out, along with the emphasis on space and the construction of an unstructured temporality, aimed at enhancing both the rhythm and the narrative complexity of the different productions.

4. Interactivity and audience participation

In 2023, some TV fiction continued to encourage interactivity and audience participation by expanding their narrative universes. This year's paradigmatic example has been *UPA Next*, the sequel to *Un Paso Adelante* made almost two decades later, featuring some of the former students who have now become teachers. This Atresmedia series previewed its first episode the 25th of December 2022, as a Christmas present for Atresplayer subscribers; however, it did not release the next seven episodes until just over four months later. To enhance its launch, the platform developed an impressive transmedia strategy so that fans could enjoy an extended and

innovative experience, with exclusive content beyond each episode and across different windows.

However, the promotional campaign had started much earlier, in April 2022, with a casting to select the protagonists of the series; that is, the new students of the dance school. The search was carried out through challenges on TikTok and Instagram designed by Toni Espinosa, choreographer *UPA Next*, which led to a face-to-face casting, where participants were evaluated by the choreographic team of the fiction. 500 people participated in the virtual casting and their videos reached more than 4 million views. Only 27 out of the initial 500 participants were called to the in-person casting, where they had to face four tests to become one of the five winners. Finally, the five winners, as well as the rest of the main cast of the series, were announced on the 14th of July at a huge gathering on ATRESplayer's Twitch channel: UPA NEXT Reveal Party.

On the 21st of December 2022, four days before the preview of the first episode, fans of the series had another very special appointment on the Twitch channel: a live meeting with the protagonists. Previously, the series had activated and promoted their official profiles on Instagram, where they shared details about their lives and explained their day-to-day lives, expanding the plots and content of the series with unpublished and exclusive stories from the digital world. The idea was for fans to connect with the characters even before the start of the fiction's broadcasts; but, above all, to capture their attention in the period between the launch of the first episode in December and the remaining seven episodes at the beginning of May 2023.

To this end, the official website of the "Escuela de artes escénicas Carmen Arranz" ("Carmen Arranz Performing Arts School") was also launched, where series fans could register, as a new student, to enjoy exclusive and unpublished content from inside the legendary academy. The website included several sections that reviewed the school's history, expanded information about the teachers and showed the facilities in detail. In addition, it allowed users to get to know Yolanda better, the school's secretary and the person in charge of explaining the ins and outs of what happened there. Finally, fans were invited to join the show's Telegram channel and not miss any of its updates, while the recovered actors of *Un Paso Adelante* (Miguel Ángel Muñoz, Silvia Cruz and Beatriz Luengo) increased their appearances in the media in order to awake the nostalgia of the fans of the original series and pique the curiosity of the young target audience.

Another transmedia add-on deployed around *UPA Next* was the launch of ATRESplayer's first metaverse experience: UPA LAND Dance Academy, a recreation of the UPA Next academy on the Roblox platform. It was a music and dance activity, which included games and challenges specially designed to entertain fans and provide them with an extended version of the story. Fans, through their avatars, could recreate the choreographies of the series protagonists, compete in dance

challenges, dress up in the clothes and fashion accessories of the fiction, and interact with the avatars of other characters, such as Lola, Silvia, Luca or Tara.



Source: Atresplayer

The official premiere of the series boosted the activity of the strategies described, integrated with other forms of participation such as, for example, the opportunity to win, through the academy’s website and the UPA Land Dance Academy, double tickets to attend the series premiere in Madrid, which was attended by its protagonists.

5. Highlights of the year

The increase in premieres on linear television reflects the *tour de forces* between linear television and streaming, both adversaries and allies, in the battle for the second life of reruns on the platforms of the channels themselves or OTTs. The significant contribution of the public channel La1 (nine out of the 16 titles in 2023) is complemented by the return of Tele5 to its own fiction after the renewal of its management team and reality shows; and also, maybe, by the unsatisfactory performance of its series in its paid version of Mitele Plus, with a historic low of 1.7% according to the GECA consultancy barometer, published on the 8th of November.⁶ On the other hand, Atresplayer holds a prominent position in the ranking of Spanish platforms, despite having a smaller market scale among OTTs, which explains the systematic premiere of all its fiction in its paid version except for the long-running serial *Amar Es Para Siempre*, which has announced its conclusion in March 2024 after 12 seasons on Antena3.

At a time of tremendous uncertainty about the future of free-to-air fiction, the offering of La1 is bolstered by past successes and the replacement of programs with declining audience curves. Thus, the once timeless *Cuéntame Cómo Pasó*, on air

⁶ See <https://www.audiovisual451.com/la-ultima-claqueta-de-cuentame-como-paso-la-mitica-serie-espano-la-termina-la-grabacion-de-su-ultima-temporada/>

since 2001, bid farewell leading the annual ranking, after 23 seasons and 413 episodes, with a finale classified by the media as ‘shocking and indescribable’.⁷ The two *Laura y Sus Misterios* TVmovies, entitled *Laura y el Misterio de la Novia que Esperó Demasiado* and *Laura y el Misterio de la Paciente Suspica*, updated the narrative world of the series *Los Misterios de Laura* with a format previously explored in 2021, about the return of the protagonist to the police investigation field to continue unveiling mysteries in a humorous way. However, there was a lukewarm reception for the first two episodes of one of the most anticipated titles of the year, the aforementioned series *Los Pacientes del Doctor García*, set in the Spanish Civil War and post-war period, which offered the remaining eight episodes on Netflix.

The premiere of the first episode of *La Que Se Avecina* on Tele5, available thereafter in its entirety on Prime Video, represents a similar experience to that of *Los Pacientes del Doctor García*, which also failed to produce the expected audience results despite the impatience with which its fans awaited its fourteenth season. Nonetheless, worse off has been the fate of Tele5’s only serial, *Mía Es La Venganza*, which languished on the Divinity channel after being withdrawn from Tele5 after the first 25 episodes. It was Tele5’s first attempt to strike back at its rivals, Antena3 and La1, after the cancellation of its flagship show *Sálvame*, the gossip show on air since 2009 which, like the rest of the channel’s reality programs, displayed unmistakable signs of exhaustion.

The diversification of formats within the same fiction also holds a prominent place in the offerings of regional channels, with the return of some of their emblematic series. For example, *L’Alqueria Blanca*, which returned to the weekly broadcast on the Valencian channel À Punt after a run of 60 episodes in its serial version, or the comeback of *El Faro*, transformed into a 10-episode series in *Faro. O Reencontro* (TVG). But perhaps the most notable impact achieved by the FORTA channels is the audience and critical acclaim of the TVmovie, *Quico Sabater: Sense Destí* on TV3, the biopic of a member of El Maquis who continued fighting after the establishment of Franco’s dictatorship in 1939, directed by the filmmaker Silvia Quer. The dramedy *Això No És Suècia*, about a family whose preconceived idyllic image of the neighborhood they have moved to crumbles, testifies to the Catalan channel’s willingness to innovate with this almost documentary-style narrative, also female-led (Mar Coll and Aina Clotet), which has earned the Prix Europa for fiction. The sudden death of the mother unites two noteworthy dramas from À Punt and TVG: *Després de Tu* and *Saudade de Ti* respectively, although intrigue also forms an essential part of the latter, in line with most of the premieres of the Galician channel in recent seasons.

Unlike free-to-air fiction, thrillers prevail in the platforms’ offer, with 22 titles out of the 65 premiered in 2023, in an array where other genres less common in recent

⁷ See the article by Esther Mucientes, *El final de Cuéntame, estremecedor e indescriptible*, published in *El Mundo* on the 30th of November 2023. (<https://www.elmundo.es/television/momentvs/2023/11/30/65681f14e85eceb-2418b458a.html>)

years also stand out, such as comedy (11 titles). In fact, two comedies that appeal respectively to acid humor and *costumbrismo* lead the offer of the Spanish platform Movistar+, both recorded (*El Otro Lado*) and linear (*Poquita Fé*).⁸

El Cuerpo en Llamas, portraying a local policewoman who murders her partner with the complicity of her lover, has turned this fictionalized version of true crime into one of Netflix's best releases in Spain⁹; a feat it shares with the American OTT thriller *La Chica de Nieve*, which tackles another of fiction's timeless themes: the kidnapping of a little girl. This time around, on Atresplayer, the biopic *Camilo Superstar* stands out, set in the 1970s musical starring the famous pop singer, along with the youth series aimed at raising awareness about bullying, *La Caja de Arena*, sponsored by the ColaCao Foundation. This latter subgenre, which has made a strong comeback on both linear TV and streaming, includes, among other notable contributions due to its pedagogical vocation, the aforementioned *UPA Next* and the Amazon Prime Video film *Culpa Mía*, based on Mercedes Ron's bestselling novel.

In summary of the highlights of the streaming offer, it can be said that that, despite the variety of genres, formats and themes of 2023, the common thread running through most of the productions in the most prolific year for Spanish fiction is the confrontation of the protagonists with their own time, their longings, and their worries.

6. Theme of the year 2023: What is happening to narratives in Ibero-American television fiction?

Spanish television fiction premieres lavished yet another season with a panorama of overabundance, where quantity and convention are observed; but also, an assortment of titles that are diverse in terms of genres, themes and formats, which increase in number when including the production coming from streaming operators. In this opulent scenario, it is not difficult to choose a sample of five original works that stand out for their quality, the interest generated by their protagonists, the novelty of the themes addressed and the uniqueness of their narrative proposals.

La Mesías (Movistar+), created and directed by Javier Calvo and Javier Ambrossi, was premiered in the official section of the San Sebastian Film Festival. It addresses current concerns such as home abandonment, identity, family relationships or the perversion of religious fundamentalism. The story begins in Montserrat, a mountain in Barcelona that attracts attention for its supernatural charge. The narrative draws on the case of Flos Mariae, a freak phenomenon starring a Catholic pop music group in 2014, made up of seven sisters. They viralize eccentric music videos on YouTube to save their mother, who spoke to God and suffers from a malignant tumor.

⁸ See <https://www.loslunesseriefilos.com/2023/12/audiencias-cuanto-espectadores-tienen-series-movistar-2023.html#respond>

⁹ See <https://webgeca.geca.es/nuevo-barometro-ott-de-geca-2/>

La Mesías is the alienated, chaotic and unstable mother of a Catalan family, composed of six cloistered sisters, a father who is as religious as he is disturbing, and two other brothers who flee in search of catharsis and who act as connections between the past and the present of the story. The narrative structure is made up of the puzzle pieces of a plot that intersects three timelines and concludes with an allegorical epilogue.

The abundant stylistic resources, primarily aimed at the construction of the characters, illustrate the visual style. For example, shooting in the round, circular panning shots to depict conversations, the play with light and shadow, or surreal long takes to portray a narcotic rave, among others. Photography is also modified to differentiate between alternative timelines using cold and warm colors, and the syncretic soundtrack and the use of music as a narrative element are highlighted.

El hijo zurdo (Movistar+) is an adaptation of Rosario Izquierdo's homonymous novel. The literary world is evident at the beginning of the episodes with the voice-over of the mother (protagonist of the story) who reads fragments of the book she writes. The genre is human drama, but it applies a vibrant rhythm to synthesize the work in six twenty-minute episodes. Written and directed by screenwriter Manuel Cobos, this award-winning miniseries at Canneseries tells the story of a mother whose son becomes a skinhead in reaction to a dysfunctional family system. The series raises reflections on family, genetic and cultural heritage (the characteristic of being left-handed as an image of anomaly), early motherhood and education.

The family is made up of characters locked in themselves, separated from each other in order to survive. For the father, a politician and the mayor's right-hand man (with whom he also maintains sexual relations), public image is more important than people. The mother fluctuates between stigma and guilt, questioning her identity and redefining her expectations and sense of belonging. The context surrounding the damaged family unit refers to a classist society, corrupted by political favour or religious fervour.

The action of *El Hijo Zurdo* (Movistar+) unfolds in Seville. It shows recognizable spaces of the city, and, at the same time, conventional places are avoided to reflect contradictions. Holy Week is made present through evocations and explicit references, as well as accompanying the protagonist's inner procession as she seeks to atone for her sins and shows her repentance.

The miniseries is formally introspective and composes a distressing atmosphere. It abounds in silences, gestures, glances, waits, close-ups that brush against the mother's face. Transitions between sequences and flashbacks are presented in a novel way, through a vertical format that extends to the present. The soundtrack stands out for its disruptive nature, with music that contrasts with the tragic narration and adds a narrative layer to the story.

El otro lado, created by and starring Berto Romero, which also premiered at the Donostia Zinemaldia, presents an exercise in harmony between horror and

naturalistic comedy, aiming to elicit spontaneous reactions through the concatenation of humour with dramatic sequences and vice versa. It is an innovative and original proposal within the genre. The fiction tells the story of a paranormal journalist who survives in the modern era with his YouTube channel after having worked in programs of the Spanish public broadcasting. Luck leads him to investigate the poltergeist case of an abuser who, even after his death, continues to terrorize his wife and son in their hive apartment in Bellvitge. This synopsis brings to light behaviours of today's world and focuses on the precariousness of the media and the deontology of idealistic journalism. To achieve this, it resorts to a play of mirrors between characters (ethical/sensationalist journalist, good/bad ghost) and genres (it combines a sexual scene with a tense seance, or a policeman holding a poodle licking his face when discovering the owner's corpse with the face devoured by the creature). A chained alternation, which circumvents clichés, surprises and throws the spectator off balance, presenting the series as a closed unit with two timelines set in different spaces. The technical effort is evident in the special effects, which combine practical special effects to support that naturalist tone, and the use of digital technology.

Selftape (Filmin) is created and starred by sisters Joana and Mireia Vilapuig and directed by Bàrbara Farré. The title refers to the self-recording method sent to casting directors for the first round of sifting when choosing the performer for a role. In this way, the series proposes a vital reflection from the actress's point of view, resorting to autofiction to relate the experiences of two performer sisters who love each other, but at the same time are rivals. The metafiction occurs because both were popular teenage faces on Catalan television, thanks to the series *Polseres Vermelles* (TV3, 2011-2013).

This narrative fosters themes related to the acting world. It portrays the role of women in this field, their precarious situation, their lack of opportunities and the repercussions of success at an early age. The industry appears as a space where the lack of protection of female intimacy, competition and selfishness rule. The story is, therefore, personal and carefully crafted. The reflexivity is elaborated through an intimate and European aesthetic, which resorts to narrative economy and naturalistic photography. But its main innovation lies in the use of domestic family videos which, inserted through cuts, function as separators between fiction and reality, proposing a metanarrative mechanism aimed at interweaving the past with the present. The archival footage (domestic VHS, real promotional television interviews, casting images and selftapes) enhances the verisimilitude of the story by providing videos of the sisters growing up, performing theatricals, dressing up, reciting, being interviewed on television or playing while laughing. The resource serves as a reminder of vocation (dreams and hopes) and underlies the idea of the transience of life by recreating past moments that will not return.

Déjate ver (Atresplayer), created, written and directed by Álvaro Carmona, is an original science fiction dramedy. It tells the story of a young artist who works as an assistant to Bassil (a mix between Banksy and Damien Hirst), one of the most famous conceptual artists, until he is diagnosed with an early stage of invisibility: he is disappearing through his toe. The doctor prescribes changing his life and admitting his contradictions. This surreal premise helps to frame a story about identity crisis and personal growth, the challenge of accepting oneself to avoid disappearing (metaphorically and literally), in an alternative and hyperbolic, yet recognizable world.

The approach is innovative because it harnesses the dystopian component to parody today's society and directs a satirical social critique against it. It individualizes a general ill to express a superficial and depersonalized society, where social media and the commodification of relationships reign, ultimately threatening self-esteem. The theme exposes the art world and introduces issues such as the concept of authorship, the prevalence of brand value over the artist, the sense of job insecurity, or failure.

The series charts a horizontal plot that runs through all episodes, although there is a meticulous construction of each part. The narrative emphasizes absurd humor and a sense of everyday strangeness thanks to the intellectualization of gags (in the excursion to a village in La Mancha, the protagonist witnesses the phenomenon of "having a Stendhal moment", that is levitating due to cultural richness), the use of irony, elaborate dialogues, and recurring metaphors. All this crystallizes into a hybrid of postmodern costumbrismo with magical realism. The aesthetics are synchronized with the dramaturgy. Camera movement, framing and editing are executed in a meaningful way, making the very form of the series part of the message. An example of this use is the crafting of the episode with a loop structure.

In conclusion, in these distinguished series it can be observed that the predominance of the female gaze is situated in a realistic and contemporary framework, and adopts themes taken from contemporary social problems, with an emphasis on identity and personal progress. The expositive structures are shaped in different temporalities (past and present), explaining the evolution of the characters and actions. There is a noticeable effort to provide genre innovation, originality in the proposals, and differentiated visual styles. The result allows us to glimpse a horizon of narrative prosperity expressed through plural, progressive and personal voices, which assume styles intertwined with influences from foreign production and traces of Spanish identity.

UNITED STATES: NARRATIVES OF HISPANIC TV IN THE U.S.¹

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Author:

Juan Piñón. <https://orcid.org/0000-0002-5460-7735>

Introduction

This year it is once again confirmed that live television events such as sports, award ceremonies, RealityTV programs and news, continue to have a key place in television and in the role this one plays in social life. Along with them, television fiction continues to be an important carrier of ratings, but the growing division of kind of productions, genres, and plots aligned to different modalities of content distribution and their specific target demographics is clearly revealed. That is, the different offering of Hispanic fictional content between open television and streaming platforms. In 2023, Univision was the ratings leader with the return to a romantic melodrama offering in telenovelas, which have their highest audience among women over 50 years old. Meanwhile, the offer of content for younger and male audiences has moved to Vix (TelevisaUnivision's platform). Thus, romantic melodrama continues to be Univision's most important fiction formula for open television, while fictional dramatic series about secret passions, suspense thriller, dystopian scenarios or science are key in the fiction offer of the Vix platform. TelevisaUnivision's strategy of making Vix's content offer visible is evident in the company's press releases, as the promotion of Vix's premieres became central to the corporation's efforts. Telemundo, meanwhile, continues to produce narratives aimed at young and male audiences with narco-narratives and suspense telenovelas or thrillers for their open television offering. But like Univision, Telemundo also seems to establish a system in which telenovelas and melodrama remain the most important fiction for open TV, while series and drama are produced for platforms, where they are released first, in this case for Netflix, and then find a second life on open TV. In 2023, the production house Argos will no longer produce for Telemundo.

¹ On behalf of Obitel, we would like to express our deep gratitude to Emily Vanides Senior Vice President, Client Business Partner at Nielsen, and to Edward Stoesser Client Solutions Director at Nielsen Media Research, for their collaboration in the realization of this study and for their invaluable contribution to the field of research in Hispanic television.

1. The U.S. Hispanic Audiovisual Context in 2023

1.1 Hispanic open television in the U.S.

Chart 1. U.S. Hispanic national open television networks/channels

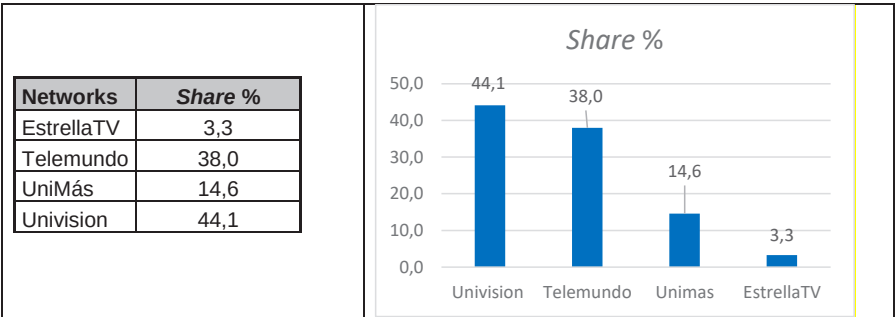
Private networks/channels
Estrella TV
Telemundo
Univision
UniMás
TOTAL NETWORKS/CHANNELS = 4

Source: Obitel U.S.

In recent years, the number of open television channels has been decreasing. With the closing of MundoMax in 2016 and Azteca América at the end of 2022, the number of television networks has been reduce to four. It is important to note that the Univision and UniMás networks are subsidiaries of the Mexican-American bi-national media conglomerate TelevisaUnivision. On the other hand, the competing television network Telemundo is a subsidiary of telecommunications and media giant Comcast/NBC. While, EstrellaTV is owned by financial firm HPS Investment Partners LLC.

In the last ten years, the opportunities provided by the digital signal through the simulcasting system have made possible the emergence of new networks. This is the case of TeleXitos, launched in 2012, which complements the programming offered by its sister network Telemundo. The network offers a full slate of movies from the 1970s to the 2000s, which are part of the NBC/Universal conglomerate’s video library, and since all its programming is in English, all the movies are dubbed. TeleXitos has positioned itself not far behind the EstrellaTV network, and if we were to consider it as a Hispanic cable network, it would be second only to TUDN (Televisa Univision Deportes Networks) in ratings.

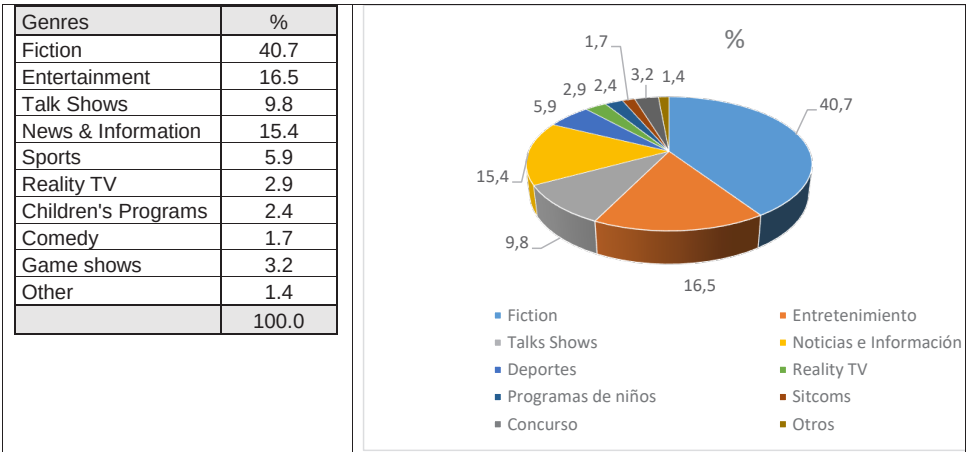
Graph 1. TV rating and share by station (rating per household)



Source: Nielsen - Obitel U.S.

The Univision network is in first place in audience share in 2023 with a difference of 6.1 points over the second-place network, Telemundo. With 44.1 share points, Univision is up three points from the 41.1 points it had in 2022. With 38 points, Telemundo lost one point with respect to the 39.3% audience share it achieved in 2022. Meanwhile, UniMás had a slight rebound in audience share with 14.6 points compared to the 14 points obtained in 2022. The closing of the television network Azteca America did not benefit Estrella TV, as it has 3.3% audience share in 2023, down from 3.6 points it had in 2022. This year, Univision achieved a difference of 6.1 share points over Telemundo, which has not happened since 2015, when the Univision network had a comfortable 11-point lead over Telemundo.

Graph 2. Genres and hours broadcast in TV programming



Source: Nielsen - Obitel U.S

With 40.7%, fiction continues to be the television genre with the most hours on screen, followed by entertainment, and then news and information in third place. Fiction was up almost three percentage points from the 37.9% it had in 2022, and is

well above the 37.1% in 2021, 36.1% in 2020, and 35.2% in 2019. In contrast, with 16.5%, the entertainment genre dropped more than 4 points from 20.7% in 2022. News and information, with 15.4%, rose slightly compared to 14.9% in 2022. The fourth category, Talk Shows, has 9.8% compared to 7.5% in 2022. Sports, in fifth place with 5.9%, was almost unchanged compared to 5.8% in 2022.

1.2. Hispanic pay TV and VoD platforms in the U.S. in 2023

In pay-TV, the landscape of the networks that dominate the market has been more or less stable over the last decade. In 2023, TUDN maintained the leadership it achieved in 2022, moving up from a second place it had held for five years. The most significant change was that Galavisión, which lost its leadership for the first time in more than 30 years when it moved to third place, moved now to fourth place among the ten most watched cable networks in 2023. Universo rises from third place in 2022 to second place in 2023

Chart 2. Hispanic pay-TV channels in the U.S.

10 most watched Hispanic pay TV channels in the U.S.				
Channel	Genre	Country of origin	Unit (000)	Rating
TUDN	Sports	U.S./Mexico	22.143	0.02
Universo	Fiction and Entertainment	U.S.	18.989	0.02
Discovery en Español	Information	U.S.	13.302	0.01
Galavisión	Fiction and Entertainment	U.S./Mexico	11.525	0.01
ESPN Deportes	Sports	U.S.EE.UU.	10.501	0.01
Fox Deportes	Sports	U.S.	8.762	0.01
Discovery Familia	Information	U.S.	4.666	0.00
GalaNovelas	Fiction	U.S.	4.190	0.00
CNN en Español	News and information	U.S.	3.743	0.00
HBO Latino	Fiction	U.S.	1.644	0.00

Source: Nielsen - Obitel U.S.

It is important to highlight the dominant position of the sports genre offering in pay-TV, not only with the first place, but with three positions among the six networks with the highest ratings. Fiction is the main genre on four of the ten networks, and information and/or news on three of the ten dominant pay-TV channels. It is important to note that none of the four fiction networks had premiere titles, as they are only complementary to open TV networks (Universo, Galavisión, GalaNovelas), or for Spanish-language versions of premium English-language networks (HBO Latino).

In 2023 Netflix, Amazon Prime, Max, Disney+, Star+, Starz, Paramount+, Peacock, and Vix continue to dominate the SVoD landscape in the United States. It is important to stress that the emergence and maintenance of these platforms is based on the power of big technology corporations and media conglomerates. With the exception of Netflix—which dominated the market early on due to its ‘first-mover advantage’ from which it continues to benefit globally—, technology infrastructure giant Amazon underpins the production of Prime Video, Warner Media underpins Max, Disney underpins Disney+ and Star+, Paramount Global underpins Paramount+, Comcats/NBC underpins Peacock, and TelevisaUnivision underpins Vix+.

1.3. Sources of financing for the audiovisual sector

The total revenue for the Mexican-American TelevisaUnivision corporation grew 5%, from \$4.6 billion dollars in 2022 to \$4.9 billion in 2023. In terms of advertising, programming licensing and subscriptions, in the U.S. the company had revenue of \$3 159.7 million dollars in 2023, slightly down from \$3 193.4 million in 2022. This was offset by TelevisaUnivision’s same revenues in Mexico of \$1,768.3 million dollars in 2023, up from \$1,518.5 million in 2022. This means that total advertising revenues grew by 6%. While in the U.S. advertising revenue decreased by 1%, advertising revenue in Mexico grew by 18% (TelevisaUnivision announces, 2024).

Comcast/NBC, the corporation that owns Telemundo, is a global company with businesses in telecommunications and platforms, as well as media, studios and amusement parks. Overall, Comcast reported revenue of \$121.6 billion, up slightly from \$121.4 billion last year. Comcast’s Media segment includes the broadcasting TV networks NBC and Telemundo, a portfolio of cable channels, the SVoD Peacock, and international TV networks such as Sky Sports. Thus, revenue in the Media segment in 2023 was \$25.4 billion, down from \$26.7 billion in 2022 (Comcast, 2024). The corporation does not report specific revenues for the Telemundo network. In the case of EstrellaTV, there is no public revenue report.

1.4. Communication policies

An effort to regulate social media, particularly at the state level, has begun, triggered on the one hand, to an increasing crisis of youth mental health issues; and on the other hand, a possible ban on the TikTok App based on the perceived threat to national security by a platform owned by the Chinese conglomerate ByteDance. The above would lead the U.S. Congress to pass a ban on the use of TikTok in state and government institutions.

The decisive emergence of the innovative use of artificial intelligence in all development sectors, including the media, also led to a concern about its possible misuse

or what could be its unintended consequences in various areas, which generated calls for regulation of this technology. This led at least 25 states in the United States to introduce bills for its regulation (Artificial Intelligence 2024).

1.5. Digital and mobile connectivity infrastructure

By January 2024 in the U.S. there were 331 million web users, with an internet penetration of 97.1%. Of these, around 239 million were social media users, representing 70.1% of the total population. There are a total of 396 million cell phones which is equivalent to 116.2% of the country's population (Kemp, 2024). 97% of Hispanics have access to the Internet, which is equivalent to the access of the general population. 91% of Latinos in the U.S. own a smartphone, one point above 90% of the general population. However, only 75% of Hispanics have a broadband connection, down from 80% of the general population. In this context, 20% of Latino adults are "phone-dependent" by not having a broadband connection at home, up from 15% of adults in the general population (Gelles-Watnick, 2024).

2. Analysis of the year: National and Iberoamerican premiere fiction in 2023

In 2023, the production of premiere titles had a decline with the release of 29 titles, down from the 35 titles released in 2022, only up from 24 in 2021, and 28 in 2020; however, fictional production has not been able to match the number of titles in 2019, in pre-pandemic times, when there were 45 titles released.

Table 1. Premier fiction titles broadcast in 2023
(national, foreign—OBITEL area—, and coproductions)

NATIONAL PREMIERE TITLES - 8	
Telemundo	
1. <i>Doctor del Pueblo</i> (unitary)	14. <i>¿Es Neta Eva?</i> (sitcom, Mexico)
2. <i>Juego de Mentiras</i> (telenovela)	15. <i>Esta Historia me Suen</i> a (unitary, Mexico)
3. <i>La Reina del Sur 3</i> (telenovela)	16. <i>Eternamente Enamorándonos</i> (telenovela, Mexico)
4. <i>Secreto Familia Greco</i> (series, U.S.-Argentina)	17. <i>La Madrastra</i> (telenovela, Mexico)
5. <i>El Señor de los Cielos 8</i> (telenovela)	18. <i>Mi Camino es Amarte</i> (telenovela, Mexico)
6. <i>El Señor de los Cielos: Sus Comienzos</i> (miniseries)	19. <i>Minas de Pasión</i> (telenovela, Mexico)
7. <i>Vuelve a mí</i> (telenovela)	20. <i>Perdona Nuestros Pecados</i> (telenovela, Mexico)
Univision	
8. <i>La Fuerza de Creer</i> (web-series)	21. <i>Renta Congelada</i> (sitcom, Mexico)
FOREIGN PREMIERE TITLES - 21	
Univision	
9. <i>Amor Dividido</i> (telenovela, Mexico)	22. <i>Rosa de Guadalupe</i> (unitary, Mexico)
10. <i>Amor Invencible</i> (telenovela, Mexico)	23. <i>Tal para Cual</i> (sitcom, Mexico)
11. <i>Cabo</i> (telenovela, Mexico)	24. <i>Tierra de Esperanza</i> (telenovela, Mexico)
12. <i>Como Dice el Dicho</i> (unitary, Mexico)	25. <i>¿Tú Crees?</i> (sitcom, Mexico)
13. <i>Corazón Guerrero</i> (telenovela, Mexico)	26. <i>Una Familia de Diez</i> (sitcom, Mexico)
	27. <i>Vecinos</i> (sitcom, Mexico)
	28. <i>Vencer la Ausencia</i> (telenovela, Mexico)
	29. <i>Vencer la Culpa</i> (telenovela, Mexico)
TOTAL PREMIERE TITLES: 29	

Source: Nielsen - Obitel U.S.

With seven titles Telemundo continues to be the leading producer of national premiere fiction, while Univision, with 21 foreign titles, continues to be the leading distributor of Obitel fiction in the U.S. It is important to note that national production has been stable with eight titles in 2023, 2022, and 2021, but below the nine titles produced in 2020, and well below pre-pandemic times with 12 productions in 2019, and 20 in 2018. While foreign production had 21 premiere titles, down from 27 productions in 2022, up from 16 in 2021, and 19 in 2020, but well below the 33 productions in 2019, before the pandemic.

Table 1b. Reruns broadcast in 2023
(national, foreign—OBITEL area—, and coproductions).

NATIONAL RERUNS – 54	
EstrellaTV (1) 1. <i>Jennie Vida de una Diva</i> (series)	UniMás 30 25. <i>Abismo de Pasión</i> (telenovela, Mexico)
Telemundo (5) 2. <i>Betty en Nueva York</i> (telenovela)	26. <i>Amorcito Corazón</i> (telenovela, Mexico)
3. <i>Decisiones</i> (unitary)	27. <i>Apuesta por un Amor</i> (telenovela, Mexico)
4. <i>Enemigo Íntimo</i> (telenovela, U.S.-Mexico)	28. <i>Como Dice el Dicho</i> (unitary, Mexico) *
5. <i>Historia de la Virgen Morena</i> (telenovela, U.S.-Mexico)	29. <i>Enamorándome de Ramón</i> (telenovela, Mexico)
6. <i>La Querida del Centauro</i> (telenovela, U.S.-Mexico)	30. <i>Esta Historia me Suena</i> (unitary, Mexico) *
Univision (2) 7. <i>La Fuerza de Creer 2</i> (series)	31. <i>La Fea Mas Bella</i> (telenovela, Mexico)
8. <i>Amor en Navidad</i> (miniseries)	32. <i>Lo Imperdonable</i> (telenovela, Mexico)
UniMás (1) 9. <i>Dani Who?</i> (series, U.S.-Mexico)	33. <i>Isla Brava</i> (series, Mexico) **
	34. <i>La Madrastra</i> (telenovela, Mexico)
	35. <i>Mañana es para Siempre</i> (telenovela, Mexico)
	36. <i>María Félix</i> (miniseries, Mexico) **
	37. <i>Montecristo</i> (miniseries, Mexico) **
	38. <i>La Mujer del Diablo</i> (series, Mexico) **
FOREIGN RERUNS - 45	39. <i>María Mercedes</i> (telenovela, Mexico)
Univision (15) 10. <i>Como Dice el Dicho</i> (unitary, Mexico) *	40. <i>Niña Amada Mía</i> (telenovela, Mexico)
11. <i>Esta Historia me Suena</i> (unitary, Mexico) *	41. <i>Nosotros los Guapos</i> (sitcom, Mexico)
12. <i>Familia Peluche</i> (sitcom, Mexico)	42. <i>Papá a Toda Madre</i> (sitcom, Mexico)
13. <i>Los González</i> (sitcom, Mexico)	43. <i>Por Ella Soy Eva</i> (telenovela, Mexico)
14. <i>Heridas de Amor</i> (telenovela, Mexico)	44. <i>El Privilegio de Amar</i> (telenovela, Mexico)
15. <i>María de todos los Ángeles</i> (sitcom, Mexico)	45. <i>Rebelde</i> (telenovela, Mexico)
16. <i>Marimar</i> (telenovela, Mexico)	46. <i>Rosalinda</i> (telenovela, Mexico)
17. <i>Nosotros los Guapos</i> (sitcom, Mexico)	47. <i>Simplemente María</i> (telenovela, Mexico)
18. <i>Quiero Amarte</i> (telenovela, Mexico)	48. <i>Soñadoras</i> (telenovela, Mexico)
19. <i>Renta Congelada</i> (sitcom, Mexico)	49. <i>Soy tu Dueña</i> (telenovela, Mexico)
20. <i>Ringo</i> (telenovela, Mexico)	50. <i>Tres Veces Ana</i> (telenovela, Mexico)
21. <i>La Rosa de Guadalupe</i> (unitary, Mexico) *	51. <i>Triunfo del Amor</i> (telenovela, Mexico)
22. <i>Una Familia de Diez</i> (sitcom, Mexico) *	52. <i>Un Gancho al Corazón</i> (telenovela, Mexico)
23. <i>Vecinos</i> (sitcom, Mexico) *	53. <i>Una Familia de Diez</i> (sitcom, Mexico) *
24. <i>Vino el Amor</i> (telenovela, Mexico)	54. <i>Vecinos</i> (sitcom, Mexico) *
* Reruns of past seasons, but which also have premiere episodes.	

Source: Nielsen - Obitel U.S.

Reruns continue to play a central role in the networks’ fiction programming, with 54 rerun titles in 2023, only three titles below the 57 reruns in 2022. However, above the 35 rerun titles in 2021, 46 in 2020 and 37 in 2018, which shows that the number of reruns is higher than previous years.

**Table 2. Formats of national premiered fiction in 2023
and its evolution in the five-year period.**

Format	Titles						Hours					
	2019	2020	2021	2022	2023	Total	2019	2020	2021	2022	2023	Total
Telenovela	8	7	6	4	4	29	466:20	342:40	387:00	194:00	238:20	1628:20
Series	3	1	1	1	2	8	33:00	10:00	19:00	6:00	9:00	77:00
Miniseries	0	0	0	2	1	3	0:00	0:00	0:00	11:00	3:00	14:00
Sitcom	0	1	1	0	0	2	0:00	0:00	0:00	0:00	0:00	0:00
Unitary	1	0	0	0	1	2	13:00	14:00	14:00	0:00	5:00	46:00
Docudrama	0	0	0	1	0	1	0:00	0:00	0:00	0:00	0:00	0:00
Other	0	0	0	1	0	1	0:00	0:00	0:00	5:00	0:00	5:00
Total	12	9	8	9	8	46	512:20	366:40	420:00	216:00	255:20	1770:20

Source: Nielsen - Orbitel U.S.

The telenovela continues to be the most important format in national fiction, however, it decreased from eight productions in 2019 to four in 2023, this trend is in accordance with the general decline of national production. In this new division of labor in which the networks produce the telenovelas, and the series are mostly produced by the platforms, it is important to highlight the modality and conditions of the inclusion of two premiere series and one miniseries in the national production in 2023. One of Telemundo’s series, *El Secreto de la Familia Greco*, is a production that was made for Netflix and later premiered on open-TV on Telemundo. While Telemundo’s three-episode miniseries *El Señor de los Cielos: Sus Comienzos* premiered first on the streaming platform Quibi in 2021, to be later released on open-TV in 2023. And finally, *La Fuerza de Creer*, with five episodes, is the fourth season of a series that was born as a webseries in its first season, premiered on Univision’s web portal, and then premiered on broadcast television.

Table 3. Premiere fiction broadcast in 2023: countries of origin

Country	Titles	%	Hours	%
NATIONAL (total)	8	28.0	255.20	18.1
OBITEL COUNTRIES (total)	21	72.0	1156.39	81.9
Argentina	0	0.0	0.00	0.0
Brazil	0	0.0	0.00	0.0
Chile	0	0.0	0.00	0.0
Colombia	0	0.0	0.00	0.0
Ecuador	0	0.0	0.00	0.0
Spain	0	0.0	0.00	0.0
U.S. Hispanic	8	28.0	255.20	18.1
Mexico	21	72.0	1156.39	81.9
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
COPRODUCTIONS (total)	0	0.0	0.00	0.0
National coproductions	0	0.0	0.00	0.0
Obitel countries coproductions	0	0.0	0.00	0.0
TOTAL	29	100.0	1412.0	100.0

Source: Nielsen - Obitel U.S.

In 2023, 1412 hours of fiction were released, below the 1637 hours in 2022, 1628 hours in 2021, and 1610 hours in 2020, and well below the 2548 hours in 2019 in pre-pandemic times. Mexico remained the most important provider of fiction for the U.S. Hispanic market, dominating the screens with 1156 hours that accounted for 82% of the total premiere fiction hours in 2023. For the first time in the count of fiction produced in Obitel countries, no other country had premiere fiction titles on Spanish-language networks. The lack of fiction from Colombia and Brazil are the most notable absences.

Table 4. Formats of national and Iberoamerican fiction broadcast in 2023

Format	Titles		Hours	
	National	The rest of Obitel area	National	The rest of Obitel area
Telenovela	4	12	238.2	793.2
Series	2	0	9.0	0.0
Miniseries	1	0	3.0	0.0
Telefilm	0	0	0.0	0.0
Sitcom	0	6	0.0	36.0
Unitary	1	3	5.0	327.5
Docudrama	0	0	0.0	0.0
Other	0	0	0.0	0.0
Total	8	21	255.20	1156.39

Source: Nielsen - Obitel U.S.

The telenovela is the dominant format in both national and Obitel production. But unlike national production, in Obitel production unitary programs play a very important role within the programming. Thus, while telenovelas account for 69% of the total hours broadcast, fiction unitary programs represent 28% of the total hours broadcast, and sitcoms 3% of Obitel hours.

Table 5. Ten most watched titles in 2023

Title		Channel	Producer (country)	Format/genre	Number of episodes in 2023	Time-slot	Rating %	Share %
1	<i>Tierra de Esperanza</i>	Univision	Televisa/Univision Mexico	Telenovela/Melodrama	61	Prime time	6.2	23.5
2	<i>Mi Camino es Amarte</i> **	Univision	Televisa/Univision Mexico	Telenovela/Melodrama	66	Prime time	6.1	20.2
3	<i>Amor Invencible</i>	Univision	Televisa/Univision Mexico	Telenovela/Melodrama	78	Prime time	5.8	20.8
4	<i>Cabo</i>	Univision	Televisa/Univision Mexico	Telenovela/Melodrama	85	Prime time	5.6	21.3
5	<i>Perdona Nuestros Pecados</i>	Univision	Televisa/Univision Mexico	Telenovela/Melodrama	89	Prime time	5.6	19.5
6	<i>Vencer la Ausencia</i> **	Univision	Televisa/Univision Mexico	Telenovela/Melodrama	41	Prime time	5.5	18.3
7	<i>La Madrastra</i> **	Univision	Televisa/Univision Mexico	Telenovela/Drama	9	Prime time	5.3	20.6
8	<i>Minas de Pasión</i>	Univision	Televisa/Univision Mexico	Telenovela/Melodrama	81	Prime time	5.2	22.3
9	<i>Eternamente Amándonos</i>	Univision	Televisa/Univision Mexico	Telenovela/Melodrama	84	Prime time	4.8	18.9
10	<i>El Señor de los Cielos 8</i> *	Telemundo	Telemundo/U.S.	Telenovela/Narco-melodrama	88	Prime time	4.7	15.5
National scripts: 1				Foreign scripts: 9				
10%				90%				

Source: Nielsen - Obitel U.S.

(*): National production

(**): The broadcasting began in 2022 and continued in 2023.

Univision dominated the list with nine of the ten most watched fictions of 2023. Traditional melodrama dominates the top three positions on the list, while the “Vencer” telenovela franchise returns to the top ten most watched with *Vencer la Ausencia*

in sixth place, having ranked ninth in 2022. This franchise, with *Vencer el Pasado* occupied second place in 2022, and was also second place with *Vencer el Desamor* in 2021. For its part, *La Madrastra*, a production of “La Fábrica de Sueños” franchise ranked seventh, having taken tenth place in 2022. From this franchise, titles such as *Los Ricos También Lloran* ranked sixth in 2022, or *Rubí*, which ranked second in 2020, and likewise *La Usurpadora* ranked second in 2019.

Since 2020, and for three years, all ten of the most watched fictions were Univision productions, and it was not until 2023 that Telemundo managed to enter again the list with *El Señor de los Cielos 8*, in tenth place. It is worth noting that Telemundo’s wa-
ger with *El Señor de los Cielos* and its eight seasons continues to yield ratings results. It should be remembered that only with the exception of the first season, from the second season on, all the seasons of *El Señor de los Cielos* have been in the list of the most watched. The success of this telenovela secured the production of its ninth season in 2024.

Table 5a. Ten most watched national titles in 2023

Title		Channel	Producer (Country)	Format/genre	Number of episodes in 2023	Time slot	Rating %	Share %
1	<i>El Señor de los Cielos 8</i>	Telemundo	Telemundo /U.S.	Telenovela/ Narco-melodrama	88	Prime time	4,7	15,5
2	<i>La Reina del Sur 3 *</i>	Telemundo	Telemundo /U.S.	Telenovela/ Narco-melodrama	15	Prime time	3,5	12,1
3	<i>Juego de Mentiras</i>	Telemundo	Telemundo /U.S.	Telenovela/ Melodrama suspense	50	Prime time	3,2	11,8
4	<i>Vuelve a Mi</i>	Telemundo	Telemundo /U.S.	Telenovela/ Drama	57	Prime time	3,1	11,9
5	<i>El Señor de los Cielos: Sus Comienzos</i>	Telemundo	Telemundo /U.S.	Telenovela/ Narco-melodrama	3	Prime time	2,5	11,1
6	<i>Doctor Pueblo</i>	Telemundo	Telemundo /U.S.	Unitary/Melodrama	5	Prime time	2,1	8,8
7	<i>Fuerza de Creer 4</i>	Univision	Univision/ U.S.	Webseries/ Melodrama	5	Tarde	1,4	10,9
8	<i>Secreto de la Familia Greco *</i>	Telemundo	Telemundo /Underground U.S./Argentina	Series/Drama	4	Prime time	0,8	5,9
Foreign scripts: 1				National original scripts: 6				
14%				86%				

Source: Nielsen - Obitel U.S.
(*): The broadcasting began in 2022 and continued in 2023.

In the context of national productions, *La Reina del Sur 3* is in second place. While its predecessor, *La Reina del Sur 2*, achieved first place in the general list of the ten most watched, and *La Reina del Sur 1* reached sixth place. In this 2013, *La Reina del Sur 3* did not make it to the general list of the most watched. Neither did Telemundo’s Miami productions, such as *Juego de Mentiras* and *Vuelve a Mi*, achieve ratings results. In particular, *Vuelve a Mi* with the return of William Levy and his star power failed to make an impact in the ratings. The same happened with the unitary program, the series and miniseries produced by Telemundo, which have the lowest positions on the list due to their low ratings

Table 6. Profile of the audience of the 10 most watched titles: gender and age

Title		Channel	Gender%	
			Women	Men
1	Tierra de Esperanza	Univision	65	35
2	Mi Camino es Amarte	Univision	63	37
3	Amor Invencible	Univision	66	34
4	Cabo	Univision	64	36
5	Perdona Nuestros Pecados	Univision	65	35
6	Vencer la Ausencia	Univision	61	39
7	La Madrastra	Univision	62	38
8	Minas de Pasión	Univision	66	34
9	Eternamente Amándonos	Univision	67	33
10	El Señor de los Cielos 8	Telemundo	54	46

Source: Nielsen - Obitel U.S.

Title		Age %						
		2 a 11	12 a 17	18-24	25-34	35-49	50 a 54	55-+
1	Tierra de Esperanza	6	4	6	7	21	11	45
2	Mi Camino es Amarte	8	5	6	8	20	8	44
3	Amor Invencible	6	4	5	7	19	10	49
4	Cabo	7	5	6	8	23	9	43
5	Perdona Nuestros Pecados	5	5	6	7	18	8	50
6	Vencer la Ausencia	8	6	7	8	21	9	42
7	La Madrastra	7	5	6	9	22	10	41
8	Minas de Pasión	5	4	4	6	20	10	51
9	Eternamente Amándonos	5	4	5	8	20	10	48
10	El Señor de los Cielos 8	8	4	7	13	27	11	31

Source: Nielsen - Obitel U.S.

The demographic profile by gender makes it very clear that the female segment comprises the largest percentage of the audience. The list and top position spots represent on average 65% of the female audience, with only 35% male audience, which is consistent with the 2022 audience report, in which the percentage of the ten most watched was 63% and 37%, respectively, and with the 65% female and 35% male in the 2021 most watched fictions audience. This contrasts with the audience trends

shown in the cases of narconovelas, as exemplified by the seventh season of *El Señor de los Cielos* which had a 54% female audience and 46% male audience.

In the audience segment by age, there is a sustained trend towards an increase in audiences over 50 years of age. For the first time, in 2023, the audience of the ten most watched fictions surpassed the 50 years old line, with 54% of audiences over 50 years old. This aging trend of the audience segment has been clear in recent years with 48% in 2022, 49% in 2021, 44% in 2020 and 41% in 2019. A further indication of this trend is that in 2015 only 31.5% of the audience was over 50 years old. Similarly, in 2023 the only difference was marked by *El Señor de los Cielos 8*, which had only 42% of audiences over 50 years old. In the end, fiction demographics are mostly made up of women over 50 years old.

3. VoD Monitoring 2023

3.1. VoD Platform market in 2023

According to *Forbes*, despite the growth of SVoD platforms, 2023 was a year in which the inflow of new subscribers declined sharply (Folk, 2024). The SVoD market has left its expansion stage behind as the bubble caused by the pandemic burst, with a marked slowdown for platforms in 2023, with only 10.1% growth, well below the 21.6% in 2022. One of the important factors in this was the number of cancellations of streaming services during the year, in a dynamic where the consumer subscribes to a streaming service to watch a particular piece of content, only to cancel it at the end of its consumption and sign up for another service. At the same time, with the emergence of new platforms, there is a “rebalancing of the market” with the presence of new players in the SVoD. Netflix, which by 2019 had 48% of the SVoD market, now only accounts for 29%, and Hulu, which had 23% of subscriptions, now only has 14% (Folk, 2024).

By the end of December 2023, the number of Netflix subscriptions globally was 247 million, followed by Prime Video with 200 million, Disney+ in third place with 150 million, Max in fourth place with 95 million, Paramount+ in fifth place with 63 million, Hulu (Star+ in Latin America) in sixth place with 48 million, Peacock in seventh place with 28 million, ESPN in eighth place with 26 million, Apple+ in ninth place with 25 million, and Starz in tenth place with 16 million (Bastarrica, 2023).

3.2. Local VoD platforms offering in 2023 (national, regional within the country)

In the context of the surge of different SVoD platforms, an important case is the emergence of Vix, a platform owned by TelevisaUnivision. The platform’s production dynamic was revealed when, in 2023, the platform premiered 18 titles which almost tie the corporation’s 22 open TV premiered titles.

3.3. VoD analysis in 2023: national premiere fiction and coproductions

The SVoD production for Latinos in the U.S., whether in English or Spanish, has always had discouraging numbers, this downward trend has been reinforced by the strategies of the different platforms to produce from Ibero-America, both for the regional market in Spanish and Portuguese, as well as for the domestic Latino market in the U.S. With this strategy and the emergence of new SVoD platforms with interest in the region, the U.S. is widely leading fiction production in the region.

Table 7. National fictions and coproductions on VoD platforms during 2023

U.S. LATIN PREMIERE TITLES (6)	
Netflix (2)	30. <i>L-Pop</i> (Series, Mexico/U.S.)
1. <i>Freeridge</i> (Series, Comedy)	31. <i>El Coro: Éxito Alla Voy</i> (Series, Brazil/U.S.)
2. <i>Neon</i> (Series, Comedy Musical)	32. <i>Mila in the Multiverse</i> (Series, Brazil/U.S.)
Hulu (1)	33. <i>It's All Right</i> (Series, Brazil/U.S.)
3. <i>This Fool 2</i> (Series, Comedy)	34. <i>C.H.U.E.C.O.</i> (Series, Argentina/Mexico/U.S.)
Amazon Prime (3)	Star+ (Hulu/Disney) (12)
4. <i>Primo</i> (Series, Comedy)	35. <i>Horario Estelar</i> (Series, Mexico/U.S.)
5. <i>The Horrors of Dolores Roach</i> (Series, Comedy)	36. <i>El Grito de las Mariposas</i> (Series, Spain/Argentina/U.S.)
6. <i>With Love 2</i> (Series, Comedy)	37. <i>Ringo, Gloria y Muerte</i> (Series, Argentina/U.S.)
U.S. PREMIERE PRODUCTIONS IN IBEROAMERICA (66)	
Netflix (8)	38. <i>Diciembre 2001</i> (Miniseries, Argentina/U.S.)
1. <i>Elite 7</i> (Series, U.S./Spain)	39. <i>Pancho Villa</i> (Series, Mexico/U.S.)
2. <i>Valeria 3</i> (Series, U.S./Spain)	40. <i>El Mantequilla: Maestro de la Estafa</i> (Series, Mexico/U.S.)
3. <i>The Snow Girl</i> (Series, U.S./Spain)	41. <i>Máscara Contra Caballero</i> (Series, Mexico/U.S.)
4. <i>El Elegido</i> (Series, U.S./Mexico)	42. <i>Nada</i> (Series, Argentina/U.S.)
5. <i>Berlín</i> (Series, U.S./Spain)	43. <i>Cómo ser un Carioca</i> (Series, Brazil/U.S.)
6. <i>Sagrada Familia</i> (Series, U.S./Spain)	44. <i>Soy tu Fan 3</i> (Series, Mexico/U.S.)
7. <i>Un Cuento Perfecto</i> (Series, U.S./Spain)	45. <i>Planners</i> (Series, Argentina/U.S.)
8. <i>Ojitos de Huevo</i> (Series, U.S./Mexico)	46. <i>Dos Tiempos</i> (Series, Brazil/U.S.)
Amazon PrimeVideo (10)	Lionsgate+ Starz (2)
9. <i>Novela</i> (Series, Brazil/U.S.)	47. <i>Nacho</i> (Series, Spain/U.S.)
10. <i>Dom 2</i> (Series, Brazil/U.S.)	48. <i>Yellow</i> (Series, Mexico/U.S.)
11. <i>Amar es para los Fuertes</i> (Series, Brazil/U.S.)	Vix+ (18)
12. <i>Melody</i> (Serie, Argentina/U.S.)	49. <i>La Mujer del Diablo 3</i> (Series, U.S./Mexico)
13. <i>Sin Huellas</i> (Series, Spain/U.S.)	50. <i>Volver a Caer</i> (Series, U.S./Mexico)
14. <i>Barrabrava</i> (Series, Argentina/Uruguay/U.S.)	51. <i>El Colapso</i> (Miniseries, U.S./Mexico)
15. <i>Chavorrocu</i> (Series, Mexico/U.S.)	52. <i>Las Pelotaris 1926</i> (Series, U.S./Mexico/Spain)
16. <i>P#t@s Redes Sociales</i> (Series, Mexico/U.S.)	53. <i>Montecristo</i> (Series, U.S./Mexico)
17. <i>Memento Mori</i> (Series, Spain/U.S.)	54. <i>Más Alla de Ti</i> (Series, U.S./Mexico)
18. <i>Los Farad</i> (Series, Spain/U.S.)	55. <i>Senda Prohibida 1, 2, y 3</i> (Series, U.S./Mexico)
HBOMax (6)	56. <i>Paraíso Blanco</i> (Series, Colombia/U.S./Mexico)
19. <i>Mariachis</i> (Series, Mexico/U.S.)	57. <i>Gloria Trevi: Ellas Soy Yo</i> (Series, U.S./Mexico)
20. <i>Candy Cruz</i> (Series, Mexico/U.S.)	58. <i>El Gallo de Oro 1</i> (Series, U.S./Mexico)
21. <i>Pollos Sin Cabeza</i> (Series, Spain/U.S.)	59. <i>La Hora Marcada</i> (Anthology, U.S./Mexico)
22. <i>Vgly</i> (Series, Mexico/U.S.)	60. <i>Pacto de Sangre</i> (Anthology, U.S./Mexico)
23. <i>Te Quiero y Me Duele</i> (Series, Mexico/U.S.)	61. <i>Se Llamaba Pedro Infante</i> (Series, U.S./Mexico)
24. <i>Días de Gallos</i> (Series, Argentina/U.S.)	62. <i>Viva la Comedy</i> (Series, U.S./Mexico)
	63. <i>Cualquier Parecido</i> (Series, U.S./Mexico)

Paramount+ (2)	64. <i>Pinches Momias</i> (Series, U.S./Mexico)
25. <i>Marcelo, Marmelo, Martelo</i> (Series, Brazil/U.S.)	65. <i>Un Buen Divorcio</i> (Series, U.S./Mexico)
26. <i>Los Enviados 2</i> (Series, Mexico/U.S.)	66. <i>Ana</i> (Series, U.S./Mexico)
Disney+ (8)	
27. <i>Viaje al Centro de la Tierra</i> (Series, Mexico/U.S.)	
28. <i>Gina Yei</i> (Series, Puerto Rico/U.S.)	
29. <i>El Club de los Graves</i> (Series, Colombia/U.S.)	
	Total: 72

Source: Obitel U.S.

3.4. Narrative features of VoD in 2023

The dominance of the ‘series’ format in production for SVoD platforms is evident. There has been a division of labor in relation to this, in which the platforms have bet mostly on the short format of series or miniseries, leaving the production of long-form formats such as telenovelas to the broadcast television networks. However, Vix is experimenting with a modality in which the format is displayed in a hybrid way, both as a short-form series and as a telenovela. This is the case of *La Mujer del Diablo* and *Senda Prohibida*, both series consisting of three seasons. The important thing is that the premiere of these series is almost sequential and follows the logic of the telenovela long format. For example, *La Mujer del Diablo* premiered in July and October 2022, and January 2023, while *Senda Prohibida* premiered the first season in June and the following two seasons in September 2023. It is important to highlight that the production team of these two series has a long trajectory in telenovela production.

4. Interactivity and audience participation

4.1. Social Interactivity

On September 11, the Telemundo network issued a press release announcing the premiere of a spin-off of its popular series *El Señor de los Cielos* (ESDLC), a prequel titled *El Señor de los Cielos: Sus Comienzos*. Since the year 2019, the filming of the miniseries of 15 chapters of ten minutes each began, then titled *Natural Born Narco*, and designed for distribution on the recently launched platform for short content Quibi. Unfortunately, the Quibi platform was shut down less than six months after its launch and so the miniseries did not achieve much visibility. But thanks to Quibi’s initial agreement with Telemundo in which the network retained the copyright, it was able to air the miniseries a couple of years after its premiere on the platform.

Telemundo's press release specifies that the series consists of three episodes that will air on September 13, 14 and 15 on its channel, and thereafter will only be available through the Peacock platform and the Telemundo app. The network states that "audiences will be able to witness the transformation of the legendary Aurelio Casillas as he goes from an ordinary boy to a powerful and enigmatic figure whose story has become a cultural phenomenon in Hispanic television". This press release was reproduced on Telemundo's different local sites in the country and by several Hispanic and Latin American media outlets such as *People en Español*, *TodoTVNews*, *Produ*, *TiempoLatino*, *El Comercio*, among others.

The aforementioned press release has a link to the official Instagram page of *El Señor de los Cielos*, where the trailer of the miniseries can be seen, and which has 1.7 million followers, with 4972 posts. Most of the posts on this Instagram account range from 15 to 70 thousand "likes" each. It is a site that has remained active through many seasons, including the eighth season, premiering in 2023. Meanwhile, on the *El Señor de los Cielos* Facebook page, which has 11 million followers, the specific post about *El Señor de los Cielos: Sus Comienzos* has 708 thousand followers. On the other hand, Telemundo did not post or upload the miniseries to its official YouTube channel, but others will do so as part of what—in this section—we call Social Participation.



4.2. Social Participation

The link to the Instagram of *El Señor de los Cielos* that the network included to promote the miniseries *El Señor de los Cielos: Sus Comienzos* was posted on September 12, 2023, the trailer had 34 thousand likes, however, it is on Facebook and YouTube where the most intense social participation takes place, since these two social networks offer, in different modalities, access to the episodes of this miniseries.

Facebook. As for Facebook, there is an official *El Señor de los Cielos* site with 11 million subscribers, where they posted: "TONIGHT everyone stay tuned to discover the origins of Aurelio Casillas and how he became the biggest drug lord 🇵🇪 🌟 SPECIAL EVENT starting TONIGHT at 10PM/9C on Telemundo. ARRE!! #ESDLC", including the trailer for the miniseries, which garnered 10,000 likes and 326 comments. Regarding the specific post announcing the prequel *El Señor de los Cielos: Sus Comienzos*, it has 721 thousand members. But it is on a Facebook fan-page titled "Aurelio Casillas Fans" where the complete chapters were uploaded, with

210 thousand followers, 17 thousand likes. However, a lack of information about the miniseries caused a great impact on interactions on three levels: one, the lack of knowledge about where the miniseries is available to watch; two, confusion about the number of chapters and how long the miniseries lasts; three, when Quibi fails, the miniseries remains unfinished, and many think that there are more episodes or another season, but it is not so. In contrast, regarding comments on the plot, these are almost unanimously very favorable: “Megafan of this series”, “Very good”, “I liked it a lot like all this series”, “Good arre”, “Very good” “The best of the best 🍷🍷”. And one of the Internet users admits: “I love it, for me is like a drug, I can’t live without watching it”

YouTube. Reviewing the distribution of the miniseries on YouTube, the following channels stand out: Lucas Giménez with 181K subscribers, Lerma Noticias with 105K, Mr. Cormac with 18K, Info Series with 5K, El Canal del Mero Mero with 1500 subscribers, and Mrbeaast with 1400. On the one hand, the channel of Mr. Cormac, who makes a summary and contextualization of the series, and uses the miniseries to make a narration and act as a reporter of the fiction, is noteworthy. And, on the other hand, the channel with the widest reach for distribution and reactions is that of Lucas Giménez. In his account with 174K followers, Lucas Giménez uploaded 21 short videos that vary between 1 to 4 minutes, whose order does not correspond with the narrative line, so it is the audience that has to make sense of the story that is being told. The cumulative total of video views is 8.539 million, with an average of 407K views per episode. Reactions total 13,385 likes, averaging about 700 likes per video. On YouTube the questions from users about where to watch the miniseries continue, as does the acknowledgement of the quality of the series and the performances: “So Good🍷”, “Don Cleto’s performance is great” and “That kid is a Darth VADER”. But, mainly, here the audience have debates to negotiate the content of what the miniseries presents to them in contrast with what they know from the ESDLC different seasons: “That’s where Aurelio and Chacorta el Narco started”, “So Aurelio killed the father of the letrudo?”. Some called attention to certain contradictions in relation to ESDLC, the super series. “There is a lot of contradiction here about grandfather Heriberto in the third season”. Others emphasized the plot and its relation to the development of the ESDLC seasons: “Who would have thought that one day he would kill his creator, the one who made him?”.

5. Highlights of the year 2023

As has been consistent over the years, live special events were the top-rated television programs for the year. The highest rated events on Hispanic television in 2023 were *Premios lo Nuestro*, broadcast on Univision, with a rating of 8.3 points,

followed by *Premios Juventud* with a rating of 7.6 points; in third place, broadcast on Telemundo, was *Miss Universe* with 7.4 points, and in fourth and fifth place, broadcast on Univision, were the *Latin American Grammy Awards* with 7.4 and the *Latin American Music Awards* with 6.6 rating points. The other event category with the highest ratings on Spanish-language television is sporting events, particularly soccer games. The CONCACAF Mexico vs. Panama game had 3 million viewers on Univision; while the Mexico-USA friendly game, broadcast on Telemundo, generated great ratings for the network with 1.5 million viewers in April 2023.

In the competition for ratings, RealityTV programs along with fiction are the highest rated program offerings on television, particularly for Telemundo. In 2023, *La Casa de los Famosos*, with 4.69 points, in a technical tie with *El Señor de los Cielos* 8, with 4.66 points, had the highest rating of any program on the network. *Los 50*, *Exatlón* and *Top Chef* had better ratings than the other fiction productions, only with the exception of *La Reina del Sur* 3. It should be noted that probably the most important television event of the year did not happen in the US but in Mexico, but with a binational impact, with Wendy Guevara winning *La Casa de los Famosos Mexico*, a television's ratings and social media milestone not seen in the last two decades.

6. Topic of the year: The narratives of fiction

The fictions produced by TelevisaUnivision in Mexico and premiering in 2023 continue the tradition of romantic melodrama that has been successful for years for the network. Narratives about secret identities, comebacks to avenge past injustices, love doomed by class differences, romances in rural settings, among others, dominated the screen. Thus, while this formula has allowed Univision to retain its ratings leadership, it has been at the cost of a slippage in audience demographics to a group made up of more than 60% women, and more than 50% people over 50 years of age. This strategy seems to be complemented by Vix's strategy of premiering drama-themed series, in subgenres such as crime drama, crime, or dystopian, more innovative and with riskier themes in terms of sexuality, that seem to be aimed at other types of audiences made up of young men.

For its part, national fiction is led by Telemundo. After the success of *La Reina del Sur* in 2011, the network gradually abandoned the romantic melodrama prepared under the neutral formula of Miami as the main engine of the stories. In this sense, the network changed the formula and opted for the reglocalizing model (Piñón, 2014), which are narratives that travel thanks to plots that happen in different cities simultaneously, and that intertwine, counting with casts of actors and characters of different nationalities (Mexican, Colombian, Venezuelan, Cuban, Spaniard, U.S.

Latinos), with very local Spanish accents and clearly culturally identifiable, showing an idea of the region, designed from Miami for global consumption (reglocal). The narratives that allowed the implementation of this formula have been mostly based on stories of drug trafficking, human trafficking, money laundering, and organized crime in general, having as context real historical events or being based on real characters, with a touch of semi-historical document, and a treatment of thriller, suspense, action, police drama, international crime drama. The premiere and success of *El Señor de los Cielos* in 2013 strengthened this strategy, which will lead the network to a rise in ratings it had never experienced before, becoming a real competitor to the previously hegemonic Univision network. Narco-centric narratives, with several successful seasons such as *La Reina del Sur*, *El Señor de los Cielos* and *Señora Acero*, among the most outstanding, will lead the network's ratings. Other crime and prison thrillers such as *Enemigo Intimo*, *El Recluso*, or *Prisionero No. 1*, will be on the network's narrative offering.

Telemundo has also made fictions dealing with migration as a social reality, and the challenges of migrants to adapt and assimilate to the social, cultural and linguistic dynamics of this country. In particular, certain differentiated dynamics are pointed out between the foreign-born and their children as U.S. Latino citizens. Some of the titles that address these dynamics are *Bajo el Mismo Cielo*, *Al Otro Lado del Muro*, or *Mi Familia Perfecta*. The network has also increasingly included characters from the LGBTQ community, who have had the role of not only making these minorities visible but also informing and teaching about their citizenship rights, such as the case of trans girl Leonor in *Sangre de mi Tierra*, and trans boy Ale in *100 Días para Enamorarnos*.

Telemundo's content division for broadcasting TV and streaming platforms seems to show a strategic move similar to that of Televisa/Univision and Vix, as Telemundo will continue with its production of telenovelas for open TV, and will work on short drama series to be released on platforms. It should be noted that Telemundo tried to integrate drama with miniseries to its open-TV offer with *El Recluso* and *Jugar con Fuego* (Piñón, 2019). Telemundo worked in 2019 with Spanish production company Isla Audiovisual in the production of *No te Puedes Esconder*, for Netflix, and in 2023, produced with Underground Studios *El Secreto de la Familia Greco*, also for Netflix. In this way, Telemundo produces drama series that will be released first on platforms and then have a second life on Spanish-language broadcast television in the United States.

In 2023, eight national titles premiered, seven on Telemundo and one on Univision. For purposes of variety in the type of narratives, in this section I will analyze three fictions, two produced by Telemundo and one by Univision.

A. *El Señor de los Cielos 8* (Telemundo, telenovela)

B. *Juego de Mentiras* (Telemundo, telenovela)

C. *La Fuerza de Creer* (Univision, webseries)

A. *El Señor de los Cielos 8*

I. Format/genre and theme: telenovela, narco-narratives, organized crime and politics.

El Señor de los Cielos 8 falls within this set of narratives produced by U.S. corporations about drug trafficking from Latin America, with a problematic vision assumingly inherent to the economic, political and cultural dynamics of the global south. However, being a production made in Mexico and Colombia, it distances itself from the vision presented in U.S. series such as *Narcos*, since in ESDLC the U.S. agencies themselves, such as the CIA, the FBI or the DEA, are part of the network of corruption and complicity of this international criminal network.

II. Vehicles of identity: social class, race, sexual orientation and gender identity.

The narrative is mostly based on the lives of the upper classes who obtain their money or power in illegal ways, on the one hand, through organized crime such as drug trafficking, money laundering, arms trafficking; on the other hand, from positions of power in government, diplomacy, the military, or the secret services, through corruption, bribery or extortion. The transnational nature of drug trafficking in the Ibero-American region and the United States makes it possible to present a multinational, multicultural melting pot through casting and characters.

A multiracial spectrum is added to the multinational and multicultural mosaic. The narrative of *El Señor de los Cielos*, where the highest levels of economic and political power have been shown mostly as white or light-skinned mestizos. Aurelio Casillas himself and his family who become, throughout the seasons, the central characters (Ximena, Chacorta, Rutila, Victor, Luz Ma, Doña Alba) are white Mexican actors (some blondes), or mestizos of light complexion. This also happens when representing the spheres of power in Mexican government and business, using mostly white or light-skinned men. The racial spectrum opens up when the leaders and members of rival criminal gangs, the guerrillas, the militia, and prisoners in jails enter the equation. It is within this marginal universe where we find the presence of dark-skinned mestizo characters, characters with indigenous, mulatto, or Afro-Latin American features.

Although the LGTBQ community has been absent from the narrative of *El Señor de los Cielos*, undisclosed male homosexuality and female bisexuality have appeared strategically under certain highly problematic conditions. Bisexual women are sexualized, in order to create attractive scenes for the male audience; in contrast, male homosexuality is treated in an undisclosed condition, or as a trait of a corrupt or deviant behavior.

IV. Characters to analyze: Aurelio Casillas, Rutila Casillas, Eunice Lara “La Felina”.

Aurelio Casillas “El Señor de los Cielos” (The Lord of the Skies)—a character inspired by Mexican drug trafficker Amado Carrillo, leader of the Juarez Cartel—became the driving force behind the plot of this series, now in its ninth season. Aurelio Casillas is a drug trafficking criminal leader whose power emanates from his sharp strategic intelligence, his bloodthirsty and ruthless nature, and his ability to camouflage and escape. On the one hand, Aurelio Casillas represents an uninhibited masculinity of unbridled sexual desire and enjoyment of sensual pleasures, while exercising control over everything and everyone, he represents a life of luxury and success. On the other hand, Aurelio Casillas is the character who, as a confessed criminal, unmasks the cynicism of the governmental apparatus and its profound corruption.

While throughout many seasons the soap opera has used the resource of sexualization and objectification of women, particularly as beings that can be disposed of, it is also important to note the presence of strong women in search of control of their lives in the context of a highly macho and patriarchal environment such as the world of narco and organized crime.

The case of Rutila Casillas, daughter of Aurelio Casillas, is interesting because the audience has seen this character grow since she was a child, and all the efforts she made to get out of her father’s business. This attempt leads her to confront her father several times, from which she will always come out alive because she is his daughter, but at the same time we see how she herself becomes, in a way, a female version of her own father. Rutila, a beautiful woman, not only finds the courage and guts to face a man’s world, but also her sexual power, just like her father. In this season we see Rutila determined to establish a relationship, on equal terms, with the Colombian guerrilla known as Super Javi.

Eunice Lara, known as “La Felina,” is probably the only truly empowered female character in the entire narco-novela. Since her appearance, she handled both male allies and adversaries as an equal. Eunice is presented to us as a mature, intelligent, assertive, beautiful and sensual woman. This character, introduced in season 4 of the super series, is killed off last season, only to be revived to share adventures with Aurelio Casillas in season 8.

The character of Mónica Robles deserves a special mention, one of the most important examples of what it means to be an intelligent and empowered woman despite her flaws. But since Monica no longer appears in season 8, I decided to include “La Felina,” as she is a character that represents the power, the agency of women.

B. *Juego de Mentiras*

I. Format/genre and theme: crime thriller telenovela

In a couple that marries in love, the wife grows dissatisfied with her marriage and her obligations as a mother, only to disappear and create a circumstance in which her husband is accused of her disappearance and possible death. To avoid being unjustly imprisoned, Cesar sets out to investigate his wife's disappearance, which along the way will lead him to find an endless web of lies and intrigue. This telenovela represents a vein of the suspense or crime thriller subgenre that Telemundo has previously used under the Miami Model formula (Acosta-Alzuru, 2009). This model implies the development of the plot in upper class settings, with a neutral position in terms of culture, there is no recognition that the characters are part of the U.S. Latino community, there is nothing that defines a Latino culture or identity despite developing in California. This formula has already been used successfully in *¿Dónde Esta Elisa?* in which, as the plot progresses, the investigations uncover dark secrets, and we discover that the characters are not what we initially believed.

II. Vehicles of identity: social class, race, sexual orientation and gender identity.

The telenovela takes place mostly in the Del Rio mansion. The mansion itself becomes a character with the drone shots, in each opening sequence, reminding us of the level of opulence and social power of this family. But it contrasts with the modest middle-class home of Cesar Ferrer, the husband of the missing Adriana. Most of the actors are Hispanic or white Mexican, and light-skinned. The only presence with Afro-Caribbean features, but also light-skinned, is Linda Marques, a police officer.

III. Characters to analyze: Renata del Río, Cesar Ferrer and Detective Barros

Renata del Rio, the matriarch of the family, plays the role of villain with verisimilitude. Renata is an empowered woman, she feels in control of the properties, the people, and the destinies of all the members of her family. Interestingly, sex is an important part of the intrigues in the plot, from her cheating husband, like most of the characters around her, but she, in the midst of her power, is a de-sexualized character and mostly stripped of a space of sensual intimacy. It would seem that, within the strategy of representation of this character, to give her sexual life would be to give her vulnerability.

Cesar Ferrer, the husband of the missing Adriana, is the protagonist of the story. He is portrayed as an honest man, a family man in love with his wife and daughter, and respectful of his mother. Throughout much of the plot Cesar is presented as the tragic hero who seems to be made to pay for crimes he did not commit by fate and the wickedness of others only to redeem himself after much resilience and finally find love.

Detective Barros. The first one in charge of enforcing the law will be the first one to break it. From the beginning of the plot, Detective Barros will become an enemy who will seek to put Ferrer in jail in any way he can. This character and his characterization represent the corruption of the system, the power of the rich over institutions, and the vulnerability of people without economic resources to defend themselves against false accusations. The character is presented as a macho white male, who insults his subordinates if they do not follow the script he expects them to follow.

C. La Fuerza de Creer 4: Dulce Sazón

I. Format/genre and theme: webseries, family melodrama of social adaptation.

The social adaptation of Latino families to U.S. realities has been a theme rarely addressed by Televisa's fiction. This webseries produced by Univision in the United States is the saga *La Fuerza de Creer* which, without mentioning migration, but with it in the background, presents a melodramatic tale impregnated with magical realism. At stake are the pride of Latin American traditions in the context of intergenerational differences and the realities and modernity of American society in Los Angeles. The plot revolves around the Carrascos, and the survival of the family restaurant in the context of changing times and traditions.

II. Vehicles of identity: social class, race, sexual orientation and gender identity.

The plot is set in a middle-class, multicultural and multiracial family. An immigrant couple: Antonio, from Mexico, and his wife Dulce, from the Dominican Republic, which shows a racial melting pot of mestizo, indigenous and Afro-Caribbean backgrounds in their daughters and grandchildren. In this sense, this fiction breaks with the traditional invisibility of Afro-Latin features in telenovelas, particularly those produced by Televisa.

III. Characters to analyze: Antonio Carrasco and his daughters: Santa, Altagracia, and Milagros.

Antonio Carrasco, the widowed patriarch of the family, loves his daughters and grandchildren, and tries to balance the values of family and cooking, which is at the heart of the family business. He is a first-generation immigrant who represents the goodness of hard work, family values and the preservation of traditions. Antonio is a sullen but loving and generous man. His relationship with his daughters is defined by love and tradition, as well as the need for change and adaptation.

Santa Carrasco is a cook who joins the restaurant kitchen and pushes for changes in the menu and presentation to be competitive. After reluctance, Antonio accepts the changes with mixed results. Santa Carrasco is separating from her husband and finds love in a restaurant customer who had been despised by her father. Altagracia

Carrasco, the professional chemist, is the one with the most impulsive temperament, and, at the same time, the one who shows the greatest attachment to gender dynamics, with a supportive husband. Milagros Carrasco, the youngest, still a student, with singing skills, will find love in the restaurant.

Each of them represents a value: Santa is pragmatic, Altagracia is professional, Milagros is a dreamer. While the grandchildren represent curiosity and change, challenging the traditional gender schemes and demonstrating an interest in scientific knowledge.

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URUGUAY: NATIONAL FICTION RETURNS TO THE SCREENS¹

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Authors:

Rosario Sánchez Vilela (<https://orcid.org/0000-0003-2995-0520>)

Tania González (<https://orcid.org/0000-0001-8805-7906>)

Introduction

The Uruguayan broadcast television panorama maintained the programming trends of large international formats in prime time, in national version or retransmission of productions from other countries (such as Argentine’s *Big Brother*). Television fiction, meanwhile, continued to be displaced to the afternoon and night time slots.

The most relevant novelty was the reappearance of national fiction with the second season of the unitary *Temporario* and the first one of the comedy *Alí Sócrates*. On the other hand, the participation of Uruguayan production companies in the transnationalization processes of fiction production for VoD platforms continued, both in co-production and in production and post-production services.

1. The Uruguayan Audiovisual Context in 2023

1.1 The Uruguayan broadcast television

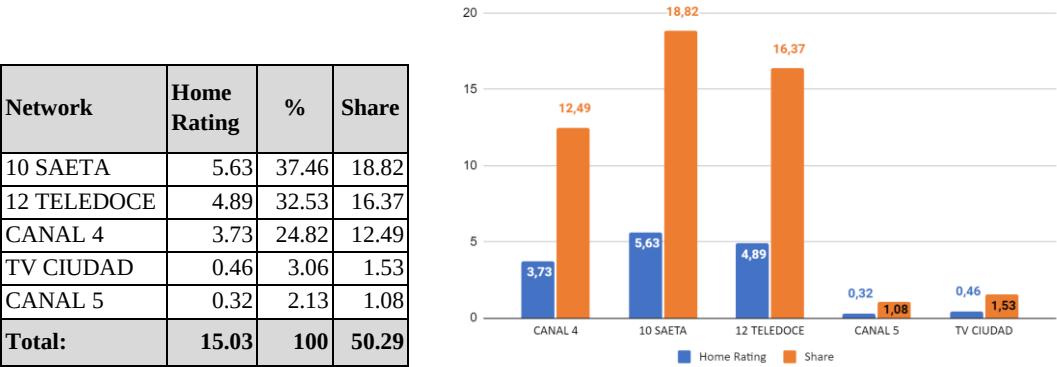
The broadcast television system remains stable, made up of three private and two public channels, one of them dependent on the government of the city of Montevideo, the country’s capital, and the other integrated into the national public media system.

Chart 1. National broadcasting networks/channels in Uruguay

Private networks/channels (3)	Public networks/channels (2)
Canal 4 (Channel 4)	Canal 5 (Channel 5)
Saeta (Channel 10)	TV Ciudad
Teledoce (Channel 12)	
TOTAL PRIVATE CHANNELS = 3	
TOTAL PUBLIC CHANNELS = 2	

¹ We thank Kantar Ibope Uruguay for providing us with the necessary data to prepare this report, and we especially want to recognize the collaboration of Carolina Arigón and Valentina Cal for their time.

Graph 1. Audience and TV share by network (home rating).



The annual audience of broadcast television in 2023 increased its *rating* by one point and its *share* by four points compared to the previous year. Graph 1 clearly shows the unbalanced performance between private and public channels in terms of capturing the audience; the historical trend of a low audience for Uruguayan public television continues. Although TV Ciudad has a slight advantage over Canal 5, it is not very significant. In commercial television, Saeta Canal 10 maintained its leadership, reaching 37.46% of the *rating*, followed by Teledoce and Canal 4, as in previous years.

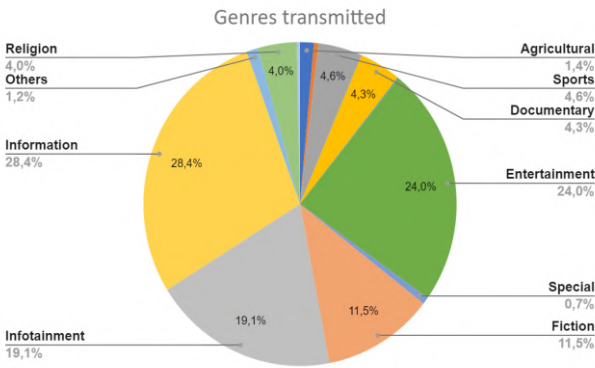
According to Kantar Ibope data, among the ten most watched programs of the year, considering the total programming, were *La Voz* (in its two versions, *La Voz Kids* and *La Voz Uruguay*), *Master Chef Celebrity* and the newscast *Subrayado*, all Saeta programs. It was followed by *¿Quién es la Máscara?*, the *Greg Mortimer* documentary, broadcast by Teledoce, and *Concentrados* on Canal 5.

Broadcast television, Kantar points out, continues to be the one that concentrated the greatest turning on in Uruguay. In second place was pay TV and 28% corresponded to streaming content. On the other hand, the average viewing time was three and a half hours a day, 67% individually and 33% co-viewing².

² <https://www.montevideo.com.uy/Negocios-y-Tendencias/Kantar-Ibope-Media-llevo-a-cabo-el-encuentro-Kimnovation-Uruguay-uc889531>

Graph 2a: Genres and hours transmitted in TV programming

Genre	Hours	%
Agricultural	461:54:00	1.43
Cultural	147:01:00	0.46
Sports	1469:13:00	4.55
Documentary	1385:43:00	4.29
Education	32:57:00	0.10
Entertainment	7748:07:00	24.01
Special	224:05:00	0.69
Fiction	3696:22:00	11.45
Infotainment	6168:58:00	19.11
Information	9150:08:00	28.35
Others	388:41:00	1.20
Religion	1295:35:00	4.01
Health	105:50:00	0.33
Total:	32274:34:01	100

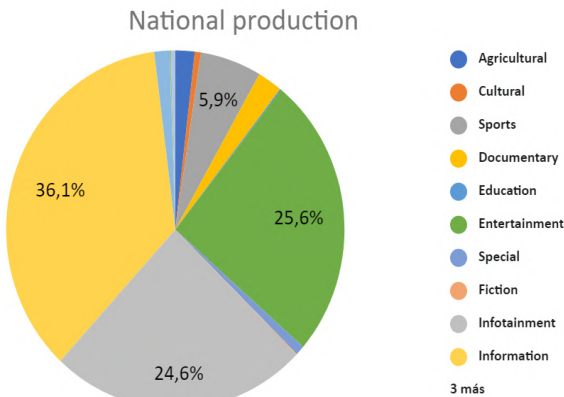


Source: Obitel Uruguay based on Kantar Ibope Media Uruguay data

The Fiction category, with 11% of screen time, ranked fourth after Information, Entertainment and Infotainment; between the three they accounted for 70% of the total broadcast hours. In recent years, there has been a constant decrease in time devoted to the fiction genre and in 2023 there was a new decrease: about 300 fewer hours were broadcast than in 2022. One of the factors that explains this loss of hours is the decrease of titles of Turkish origin, a trend that has been consolidated in the last three years: nine titles were broadcast in 2021, six in 2022 and four in 2023.

Graph 2b. Exhibited genres of national production

Genre	Hours	%
Agricultural	461:54:00	1.84
Cultural	147:01:00	0.59
Sports	1469:13:00	5.86
Documentary	594:59:00	2.37
Education	32:57:00	0.13
Entertainment	6422:54:00	25.60
Special	214:05:00	0.85
Fiction	16:50:00	0.07
Infotainment	6168:58:00	24.59
Information	9058:27:00	36.10
Others	368:08:00	1.47
Religion	30:34:00	0.12
Health	105:50:00	0.42
	25091:50:00	100



Source: Obitel Uruguay based on Kantar IBOPE Media Uruguay data.

78% of the total screen time was occupied by nationally produced programs, composed in its greatest proportion of Information and Entertainment. The sum of both genres occupied more than 60% of the produced Uruguayan programs. Infotainment constituted almost 25%, while national fiction barely managed to occupy 16 hours and 50 minutes, 0.07% of the time devoted to national productions.

1.2. Pay TV and VoD platforms in Uruguay

Table 2 details the main pay television companies in Uruguay. In general terms, the number of services in 2023 was 496,127, which was 77,619 less than in 2022. This confirms the trend of decline that pay television has been experiencing progressively since 2016 (URSEC, 2023, p.91). The highest number of this type of television services was reached in 2015 and since then the drop has been 40% (Radar, 2023, p.7).

Chart 2. Pay TV companies³ in Uruguay

Company	Origin
TCC	Uruguay
Nuevo Siglo	Uruguay
Cablevisión (Flow)	Argentina
Montecable	Uruguay
Direct TV	United States

Source: Obitel Uruguay.

Direct TV has the largest number of services nationwide with 29%, followed by Flow with 9%, TCC with 7% and finally, Montecable and Nuevo Siglo with 6%. The region that registers the largest number of services continues to be the country’s capital, Montevideo, with 35% of the total (URSEC, 2023, p.92).

The main international SVoD platforms are Netflix, Amazon Prime, HBO Max (now Max), Flow (Cablevisión), Movistar+ (Telefónica), Claro Video (América Móvil), Disney +, Star +, Paramount+ and, exclusively dedicated to cinema, Mubi. The two national platforms are Cinemateca, which offers cinema, and Antel TV, the public platform, dependent on the State telephone company.

In March 2022, the availability of the Vix streaming platform, from the Televisa-Univision group, was announced for Uruguay. It is an AVoD service (content on demand with advertising) which is mainly made up of Televisa soap operas. This

³ This table reports pay TV companies and not networks or channels because there are no measurements of cable channels that allow identifying which are the most relevant.

platform would be added to another AVoD already operational: Pluto TV. Both function as live channels that also enable on-demand content.

1.3. Financing sources in the audiovisual sector

According to data from Kantar Ibope's Monitor Evolution, advertising investment in fiction aired on broadcast television was 1,317,691 seconds and the main advertisers were Teleshopping, L'Oréal and Unilever.

During 2023, the main instrument of support for the audiovisual industry continued to be the Uruguay Audiovisual Program (PUA), which has 12 million dollars managed by the Uruguayan Film and Audiovisual Agency (ACAU) and has several lines (national, international and advertising). The two Uruguayan fictions released on broadcast television in 2023 were supported by this program.

SeriesUy has been the only specific fund for the creation of television fiction series, but it had its last call in 2021. It was an inter-institutional fund that brought together entities dependent on the Ministry of Education and Culture (ACAU, and Channel 5), of the Ministry of Industry and Energy and the Municipality of Montevideo (Montevideo Audiovisual and TV Ciudad). Created at the end of 2016, SeriesUy, had its first winning fiction in 2017. So far, three fictions have been broadcast as a result of this program: *Todos Detrás de Momo*, released in 2018, *Metro de Montevideo*, in 2021 and *Alí Sócrates* in 2023. The last project to emerge from the 2021 call, *¿Es Amor?*, from the production company Coral, is in the process of execution.

The fund of \$5,000,000 (about 125,000 dollars) changed its bases, with different requirements in terms of number of chapters, duration of each one and execution times. The fictions would be broadcast by public media that would have the rights for a few years. The evaluation of the entities involved in the performance of the fund led to the decision to close it. Instead, a new design with a regional approach is now being considered.

In 2023, a novelty occurred when the fund of the Ministry of Industry and Energy (MIEM) devoted for commercial broadcast television channels, which transmit in digital terrestrial television (DTT) mode for the production of content, was modified to admit the application for production of international formats. The fund is \$85,000,000 and the applicant projects had to be of more than 20 million pesos, of which up to 30% is reimbursed and they must have started before December 2022. In this way, the commercial channels could receive financial support to produce entertainment formats (such as *¿Quién es la Máscara?*, *Teledoce*, *La Voz*, Canal 10, *Bake off*, Canal 4), regardless of international origin, as long as they use national resources. The initiative received criticism from the opposition party, Frente Amplio, and observation from the Court of Auditors.

1.4. Communication policies

One of the most relevant events in 2023 was the setting up of the new institutional framework of the State entity that directly deals with audiovisuals. In mid-2022, the Uruguayan Film and Audiovisual Agency (ACAU) was created, which would replace the Film and Audiovisual Institute. The ACAU concentrated some functions that were distributed to various organizations and centralized the administration of the incentive funds, among them the Uruguay Audiovisual Program (PUA).

The board of the new entity took over in January 2023, made up of a representative from the Ministry of Education and Culture, another from the Ministry of Economy, representatives of the audiovisual sector and its president, Facundo Ponce de León. During this first year, much of the work was committed to the transition from the old to the new institutionality. An Audiovisual Observatory was created and a process management system was designed. The lines of action defined by the new Agency are aimed to achieve an intersection between cultural and industrial purposes; they propose to allocate resources not only to audiovisual production, but also to three other dimensions: distribution, access and preservation. On the other hand, it is intended to strengthen the funds allocated for development to support the first creative stage of audiovisual⁴ projects.

At the Parliament, this year the discussion on a new Media Law that would repeal the current law 19,307, passed in 2014, once again gained prominence. The new law promoted by the current government eliminates the organizations created by law 19,307: the Council of Audiovisual Communication, the Honorary Advisory Commission for Audiovisual Communication (CHASCA), the Ombudsman's Office and the Honorary Advisory Council of Public Media, most of which have not been implemented since the law was passed. Other aspects that the new law would modify refer to the increase in the number of frequencies that can be concentrated in the hands of a single owner and the repeal of the fee that television channels had to pay for the use of frequencies, intended to form the Fund of Promotion of the Audiovisual Sector, although in fact successive governments exempted the channels from paying this fee. The new bill was passed by the Lower House and went to the Senate for consideration in 2024.⁵

1.5. Digital and mobile connectivity infrastructure

Fixed broadband services were 1,097,847, of which 93% corresponded to fiber optics operated by Antel, the State company that until mid-2023 maintained a monopoly on this type of technology. Since then, several cable operating companies were authorized to provide internet⁶ services. The parliamentary resolution is from 2022, but

⁴ Interview conducted by the author Rosario Sánchez with the president of ACAU, Facundo Ponce de León, on May 6, 2024.

⁵ At the end of this report, the bill had been passed with modifications by the Senate, so it must go back to the Lower House. The controversy over the changes introduced is causing problems in order to obtain the approval of this law. We will surely deal with these aspects in the chapter on Uruguay, in the next yearbook.

⁶ The central reason for granting licenses is that in this way the countryside cable companies will be helped. [ht-](#)

licenses were only granted in 2023.

Mobile telephony had a year-on-year increase in the number of services of 7.5% compared to 2022 with 6,532,569 active services of which 60% corresponded to An-tel, 23% to Movistar and 17% to Claro. Uruguay occupies fourth place in terms of mobile internet speed with 149.08 megabytes per second⁷.

According to the latest survey by *El Perfil del Internauta Uruguayo 2023*, 100% of the population lives in homes with a device with internet access, 97% with a smart-phone and 69% with Smart TV. The gap between socioeconomic levels is very small with respect to the ownership of a smartphone (93% at low levels, 98% at medium levels and 100% at high levels), but it deepens in other devices, such as notebooks, tablets and Smart TVs (Radar, 2023, p.5).

95% of the population is an internet user and 78% has Wi-Fi internet access in their homes. If the age of the users is considered, the survey shows that at the extremes of age range, Internet use continues to grow: seven out of ten children between 0 and 5 years old use the Internet and nine out of ten people over 65 years of age also do so. The average time of daily Internet use is 6.6 hours per person, and in women it is one hour higher than in men. The Internet use with highest percentages is chatting on Facebook or Whatsapp and social networks in general (96% and 84% respectively) while watching or downloading movies or series reached 58%. This last use reached rates of more than 70% between 12 and 29 years of age and decreased as age increased until reaching 40% in those over 65 years of age. As for social networks, Facebook and Instagram continue to be the favorites and in third place, much further away, Tik Tok, although together with Instagram it is the predominant one in the younger sectors (Radar, 2023).

[tps://www.elpais.com.uy/negocios/noticias/un-hito-para-los-cableoperadores-le-aprobaron-la-primera-licencia-para-que-puedan-ofrecer-internet](https://www.elpais.com.uy/negocios/noticias/un-hito-para-los-cableoperadores-le-aprobaron-la-primera-licencia-para-que-puedan-ofrecer-internet); <https://www.elobservador.com.uy/nota/once-cables-ya-recibieron-autorizacion-para-ofrecer-internet-y-dan-los-pasos-finales-para-dar-el-servicio-20238820350>.

⁷ <https://www.uruguayxxi.gub.uy/es/noticias/articulo/uruguay-se-ubico-entre-los-paises-con-mayor-velocidad-de-internet-movil-del-mundo/>

2. Analysis of the Year: national and Ibero-American fiction premieres on open TV

Table 1. Premiered Fictions Broadcast in 2023

PREMIERED NATIONAL TITLES - 2	PREMIERED FOREIGN TITLES - 14
10 Saeta	12 Teledoce
1. <i>Temporario</i> 2 (unitary)	1. <i>Café Con Aroma De Mujer</i> (soap opera-USA-Colombia)
Canal 5	2. <i>La Madrastra</i> (soap opera-Mexico)
2. <i>Alí Sócrates</i> (series)	3. <i>Los Ricos También Lloran</i> (soap opera-Mexico)
	4. <i>Más Que Una Ilusión</i> (soap opera-Brazil)
	5. <i>Orgullo y Pasión</i> (soap opera-Brazil)
	6. <i>Pantanal</i> (soap opera-Brazil)
	7. <i>Solo Confía</i> (soap opera-Brazil)
	8. <i>Solo Se Vive Dos Veces</i> (soap opera-Brazil)
	9. <i>Travesía</i> (soap opera-Brazil)
	Canal 4
	10. <i>Juegos de Poder</i> (soap opera-Chile)
	11. <i>La Ley de Baltazar</i> (soap opera-Chile)
	12. <i>Oro Verde</i> (soap opera-Brazil)
	13. <i>Tierra de Amor y Venganza</i> (soap opera-Argentina)
	Canal 5
	14. <i>Vivir sin Permiso</i> (series-Spain)
	PREMIERED TITLES TOTAL: 16

Source: Obitel Uruguay

In 2023, 16 titles were released, two more than in 2022. Teledoce continued to be the largest provider of premieres: nine of the 16 titles were offered on that channel. Meanwhile, Canal 4 continued to include Chilean fiction and is the only channel that offered Argentine fiction.

In addition to the reappearance of Argentinian fiction in the offering, the other novelty was that national fiction was released again: one title on public television, *Alí Sócrates*, and the other on Saeta Canal 10, *Temporario*. As seen in Table 2, in the last five years the presence of national fiction has oscillated between one and two titles per year, with a low volume of hours which in that period reached a total of almost 80 hours. The formats adopted have been the unitary and the series. This last format is the one that reached the greatest number of hours, 70:39.

Table 2. National fiction formats released in 2023 and their evolution in the five-year period

Format	Titles						Hours					
	2019	2020	2021	2022	2023	Total	2019	2020	2021	2022	2023	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	1	1	1	0	1	4	3:22:30	46:52:30	8:00:00	0:00:00	12:24:00	70:39:00
Miniseries	0	0	0	0	0	0	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00
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	1	0	1	2	0:00:00	0:00:00	4:50:00	0:00:00	4:26:00	9:16:00
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	0	0	0	0	0	0	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00
Total	1	1	2	0	2	6	3:22:30	46:52:30	12:50:00	0:00:00	16:50:00	79:55:00

Source: Obitel Uruguay based on Kantar Ibope data.

Table 3. Premiere fictions released in 2023: countries of origin

Country	Titles	%	Hours	%
NATIONAL (total)	2.00	13	16:50:00	2
OBITEL COUNTRIES (total)	14.00	88	1014:28:00	98
Argentina	1	6	130:07:00	13
Brazil	7	44	478:51:00	46
Chile	2	13	222:21:00	22
Colombia	0	0	0:00:00	0
Ecuador	0	0	0:00:00	0
Spain	1	6	30:22:00	3
USA Hispanic	0	0	0:00:00	0
Mexico	2	13	65:23:00	6
Peru	0	0	0:00:00	0
Portugal	0	0	0:00:00	0
Uruguay	2	16	16:50:00	2
Venezuela	0	0	0:00:00	0
COPRODUCTIONS (total)	1	6	87:24:00	8
National Coproductions	0	0	0:00:00	0
Obitel Countries Coproductions	1	6	87:24:00	0
TOTAL	16,00	100	1031:18:00	100

Source: Obitel Uruguay based on Kantar Ibope data.

The volume of hours of premiere fiction increased by about 300 hours compared to 2022, but it represented less than a third of the total time devoted to fiction. The two national fictions represented 2% of the total time covered by Ibero-American premieres and 13% of the titles. The offer was mainly composed of titles of Brazilian origin and the constant number of Chilean and Mexican fictions was maintained.

Argentinian fiction, which had been absent in the last two years, returned to the offer although with only one title.

In terms of formats, the soap opera dominated, representing 97% of the time dedicated to Ibero-American fiction premieres. On the other hand, the series, which had a major presence in previous years, remained the same as in 2022 with a single premiere.

Table 4. National and Obitel fiction formats shown in 2023

Format	Titles				Hours			
	Nationals	%	Obitel Rest	%	Nationals	%	Obitel Rest	%
Soap opera	0	0.0	13	93.0	0:00:00	0.0	984:06:00	97.0
Series	1	50.0	1	7.0	12:24:00	74.0	30:22:00	3.0
Miniseries	0	0.0	0	0.0	0:00:00	0.0	0:00:00	0.0
Sitcom	0	0.0	0	0.0	0:00:00	0.0	0:00:00	0.0
Unitary	1	50.0	0	0.0	4:26:00	26.0	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	2	100.0	14	100.0	16:50:00	100.0	1014:28:00	100.0

Source: Obitel Uruguay based on Kantar Ibope data.

Table 5: 10 Most watched titles in 2023

Title		Channel	Producer (Country)	Format/genre	No. of chap/ep in 2023	Time slot	Rating	Share
1	Pantanal	12 Teledoce	Brazil	Soap opera	83	Night	8.03	16.67
2	Travesía	12 Teledoce	Brazil	Soap opera	88	Afternoon	7.68	18.88
3	Solo Confía	12 Teledoce	Brazil	Soap opera	58	Afternoon	6.91	17.71
4	Café Con Aroma De Mujer	12 Teledoce	(USA-Colombia)	Soap opera	95	Afternoon	6.71	17.37
5	Solo Se Vive Dos Veces	12 Teledoce	Brazil	Soap opera	69	Afternoon	6.25	16.40
6	Temporario 2	10 Saeta	Uruguay	Unitary	8	Night	6.01	12.77
7	La Madrastra	12 Teledoce	Mexico	Soap opera	50	Afternoon	5.74	15.58
8	Los Ricos También Lloran	12 Teledoce	Mexico	Soap opera	20	Afternoon	5.26	15.86
9	La Ley De Baltazar	Canal 4	Chile	Soap opera	131	Night	5.06	10.52
10	Más Que Una Ilusión	12 Teledoce	Brazil	Soap opera	55	Afternoon	4.90	14.17
Total of national productions: 1				Original foreign scripts: 9				
10%				90%				

Source: Kantar Ibope Media Uruguay – Obitel Uruguay

Five of the titles of the ten most viewed are from Brazil, two from Mexico, one from Chile and one from Uruguay. The novelty that this table presents compared to the previous year is precisely the presence of a national fiction, the second season of *Temporario*, which obtained the sixth place. The title that achieved the highest *rating* percentage was *Pantanal*, with 8.03%, however that number is one point less than that obtained in 2022 by the soap opera that ranked first that year, that was *Si Nos Dejan*. As we had already pointed out in the previous report, the audience for Ibero-American fiction continues to decline.

Some trends that had been shown in previous reports are confirmed: the predominance of Brazilian products, the almost absence of Argentinian fiction, the dominance of soap operas and the location of these titles in the afternoon and night hours. The fiction offer was absent from prime time, which was instead occupied by entertainment formats. Finally, the most viewed titles were broadcast mainly by Teledoce: this channel, which was also the one that offered the most premieres of Ibero-American fiction, broadcast eight of the ten titles.

**Table 6: Audience profile of the 10 most watched titles:
sex, age, socioeconomic status**

Title		Channel	Sex %		Socioeconomic status%				
			Women	Men	U+U-	M+	M	M-	L+L-
1	<i>Pantanal</i>	Teledoce	57.7	42.2	15.7	13.3	16.8	23.3	30.6
2	<i>Travesía</i>	Teledoce	70.7	29.21	8.0	9.8	23.4	24.8	33.8
3	<i>Solo Confía</i>	Teledoce	68.3	31.6	6.7	8.45	24.8	27.9	32.0
4	<i>Café Con Aroma De Mujer</i>	Teledoce	68.1	31.8	10.3	10.5	21.0	26.1	32.0
5	<i>Solo Se Vive Dos Veces</i>	Teledoce	75.9	24.0	7.0	9.1	28.6	25.6	29.4
6	<i>Temporario 2</i>	Canal 10	56.7	43.2	20.6	9.5	39.3	6.2	24.3
7	<i>La Madrastra</i>	Teledoce	76.3	23.6	6.37	9.3	31.0	23.3	29.9
8	<i>Los Ricos También Lloran</i>	Teledoce	71.5	28.5	15.1	6.2	25.4	23.0	30.1
9	<i>La Ley De Baltazar</i>	Canal 4	70.4	295	24.1	8.0	21.1	30.8	15.8
10	<i>Más Que Una Ilusión</i>	Teledoce	67.3	32.6	9.5	10.9	26.6	24.3	28.5

Title		Channel	Age %						
			4-11	12-17	18-24	25-34	35-49	50-59	60+
1	<i>Pantanal</i>	Teledoce	3.2	3.2	7.1	10.4	22.5	15.6	37.6
2	<i>Travesía</i>	Teledoce	3.7	3.3	8.1	9.9	17.9	11.0	45.9
3	<i>Solo Confía</i>	Teledoce	2.7	5.6	12.4	10.5	15.6	8.7	44.1
4	<i>Café Con Aroma De Mujer</i>	Teledoce	3.8	3.8	8.0	11.7	18.3	10.2	43.9
5	<i>Solo Se Vive Dos Veces</i>	Teledoce	3.2	2.8	6.0	13.5	14.8	5.4	54.0
6	<i>Temporario 2</i>	Canal	4.3	4.8	6.1	3.8	16.4	18.8	45.6
7	<i>La Madrastra</i>	Teledoce	3.0	2.8	6.8	14.2	15.8	5.9	51.2
8	<i>Los Ricos También Lloran</i>	Teledoce	4.4	3.0	4.4	12.8	11.1	8.8	55.1
9	<i>La Ley De Baltazar</i>	Canal 4	1.4	2.7	5.0	4.1	9.7	7.9	68.8
10	<i>Más Que Una Ilusión</i>	Teledoce	4.3	2.6	7.4	17.0	15.6	8.1	44.7

Source: Obitel Uruguay based on Kantar Ibope data.

The composition of the top ten audience reveals, in general, a predominance of women in the audience and low percentages of the audience located in the high and medium-high socioeconomic levels. Especially in the Medium + level, it is the one that registered the lowest audience volume, while the percentages increased progressively between levels M to L-.

However, some significant variations are observed in some titles. Thus, it is confirmed that in *Pantanal* and *Temporario*, the percentages corresponding to women and men tend to balance, registering an increase in the number of men who watched these fictions. In the first, 57.7% of the audience were women and 42.2% men; in the second, 56.7% were women and 43.2% men, while in the rest of the titles the percentages of women exceeded those of men by more than thirty points.

Another aspect that can be observed in *Temporario's* audience is that its composition by socioeconomic level had a greater volume at the high level, 20.6%, and at the medium level, 39.3%, compared to the other titles. The connection of this fiction with the theatrical institution El Galpón that gave birth to it may be an explanatory hypothesis for this characteristic of the audience. Regarding ages, however, it follows the same trend as the rest of the titles in which the highest percentage of the audience corresponded to people over 60 years of age.

3. VoD Monitoring 2023

3.1. VoD systems market

The panorama of VoD platforms in 2023 remained unchanged compared to the previous year (see section 1.2), although according to the report *El perfil del Internauta Uruguayo 2023* (Radar, 2023), Netflix once again reduced the percentage of users to 70% , while YouTube remained at 53%, Disney and HBO at 15% and Prime at 10%. Star+ was the one that experienced the most pronounced growth, reaching 23% (p.21). The dimensions and characteristics of the market remain very opaque to the extent that there is no access to the number of users of each platform or amount of money involved.

3.2. VoD analysis in 2023

In 2023, the series *Barrabrava* was released, a co-production of Uruguay with Argentina, directed by Jesús Braceras -who was also its showrunner- and starring Matías Mayer and Gastón Pauls. The Uruguayan production company was Cimarrón Cine for Prime Video, which also provided production services for other series released in 2023, such as the second season of *Iosi, el Espía Arrepentido* or the latest seasons of *Impuros*, also on Prime.

This production company is the one with the greatest presence in the development of television and film fiction projects (as is the case of *Society of the Snow*, by Juan Antonio Bayona, made in Spain and Uruguay), but it is not the only one. The growth of Uruguay as an audiovisual hub has led to talk of a kind of “Hollywood Uruguayan-style”⁸.

TABLE 7: National fictions and co-productions released in 2023 in VoD systems

PREMIERE COPRODUCTIONS
Prime Video (1)
<i>Barrabrava</i> ⁹ (Argentina-Uruguay)
Total: 1

9

⁸<https://www.lanacion.com.ar/espectaculos/series-de-tv/producciones-en-fuga-los-actores-los-directores-y-las-tramas-son-argentinas-pero-se-filman-en-nid29092023/>; <https://www.cronista.com/apertura/empresas/uruguay-quiere-ser-el-hollywood-del-sur-seduce-a-la-industria-del-cine-con-beneficios-fiscales/>

⁹ Produced by Red Fish, Cimarrón and Amazon.

Barrabrava revolves around the conflict that grew among the hooligans of Atlético Libertad del Puerto club based on the intention of the club's leadership to sell a fundamental player to promote to the first division. A violent struggle breaks out for the leadership of the hooligans, which determines the death of its historical leader, "El Tío" and the expulsion of the Urrutia brothers, César and "El Polaco". In addition to recreating the plots of power and corruption around football, taking a fictional club as its axis, the series represents complex characters who move in a context of marginality, poverty and violence from which it seems difficult to escape. The two main characters undergo transformation processes and have trajectories in the opposite direction that come into conflict: one towards sinking, that of César, and the other towards ascent, that of "El Polaco". This character develops in a narrative arc in which he seems to be going towards a certain redemption, in impulses aimed at distancing himself from the violence of the hooligans' violence, but finally he approaches the profile of the tragic hero, subjected to fatal forces that he cannot control, to a destiny that must be fulfilled. The circle cannot be broken. The representation of marginality is presented as vital conditions in a world closed in itself and without an exit.

Finally, towards the end of 2023, the presence of Uruguayan fiction will once again be registered on the Argentinian channel UN3TV. In November, the web series *No Hay Nadie* premiered, created and directed by Joaquín Bravo, who defines this fiction as a comedy of "existential humor"¹⁰. In eight unitary episodes, of varying duration around ten minutes, the series covers everyday situations crossed by the absurd, with a narrative logic concentrated in a single location. The fiction is the result of the alliance between the production companies Básico and Puré with UN3TV.

4. Interactivity and audience participation

For the topic of this section we will deal with *Alí Sócrates*, that in terms of interactivity, has the most frequent characteristics of Uruguayan television fiction. We mean that these are projects based on personal efforts, that for several years seek to add resources from different funds and build up alliances, until they finally manage to produce the fiction and broadcast it. This determines that the call to the public is present long before the fiction takes shape, with press releases, media reports and the opening of social media accounts.

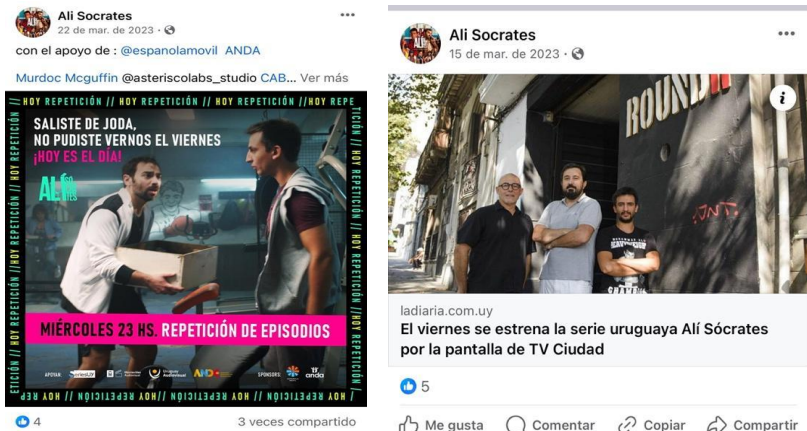
Such is the case of *Alí Sócrates*, which began to develop in 2015. At the end of that year, a pilot was recorded and it had its first presence on social networks in April 2016.

¹⁰<https://ladiaria.com.uy/cultura/articulo/2023/11/no-hay-nadie-la-serie-uruguay-que-hace-humor-des-de-una-plataforma-argentina/>



That year its Facebook and X account (then Twitter) were created in which people were invited to watch the pilot of the first chapter on a website that is no longer active and events were announced to raise funds and there were also calls for extras for the filming. The design of interactivity in social networks then had its configuration from that moment and the contents changed when the series was produced as it was a project selected by SeriesUy.

The audience engagement strategy consisted of the publishing of content on three social networks: X (@alisocratesgym), Instagram (@alisocrates) and Facebook. The propagation of content was implemented: some in advance through announcements of premieres and previews of episodes and also recovery content (fragments of scenes and announcements of episode repetitions), with the aim of keeping the public updated on past and future events. Within the framework of this strategy, informative content was produced, both contextual and promotional, which are those that seek either to expand knowledge about the diegetic universe (presentation of characters, star guests) or to provide the public with access to the extradiegetic universe (the contents of presentation of the technical team, backstage photos and press and radio notes with the directors).





The greatest flow of publications by broadcasters and public interaction occurred through Facebook. In general terms, public participation in relation to interaction with the content was low on all networks.

This performance can be explained because the contents that make up the propagation strategies, although they serve to “diversify the points of contact of consumers with the narrative universe”, have limited potential to achieve audience involvement (Fechine, et al, 2013 p .38).

5. Highlights of the Year

Broadcast television in 2023 maintained the same characteristics as the previous year: entertainment and information programs predominated, especially long news-casts. The most relevant aspect of the year was the reappearance of national fiction on the screen with two titles, *Temporario* and *Alí Sócrates*. In the first case it is the second season of a series of eight single episodes and in the second it is a comedy with a series format, also with eight chapters.

Despite the little promotion, *Temporario* was placed in sixth place in the top ten with 6 rating points, in the same place in the ranking and with the same audience capture as in its first season of 2021. This fact is quite extraordinary, in two senses: it is not common to have a second season in national television fiction and even less to repeat in the top ten.

This fiction was born from the theatrical institution El Galpón¹¹, with a long tradition in the country that, faced with the crisis caused by the pandemic situation due to the closure of theaters, partnered with the production company La Vorágine

¹¹ Founded in 1949, the institution was linked to the dense history of independent theater in Uruguay.

Films to carry out this production using the theater as a location and its acting resources. The first season of *Temporario* was the result of those efforts. It also received support from various public funds, including the PUA. As in the first season, this new chapter brought together various scriptwriters and directors. It was broadcast by Saeta Canal 10 screen, which, as noted at the beginning of this chapter, is the channel with the highest levels of audience that may have contributed to the performance of the series.

Alí Sócrates, that also announces a second season, stands out for aspects that we will analyze in the following section, but we will point out here that, unlike *Temporario*, it was broadcast on the two public television stations at different times of the year, first on TV Ciudad and then on Canal 5. The audience data was in line with the general performance of both channels: it obtained 0.52 rating and 1.06 share on TV Ciudad and 0.20 and 0.36 respectively on Canal 5. The series created by Gonzalo Durante and Sebastián Pérez Pérez, director and screenwriter, added several funds, including SeriesUy, PUA, Montevideo Audiovisual and the Cultural Incentive Fund, in addition to combining the work of several production companies: the Uruguayan Murdoc and McGuffin, together to Asterisco Labs from Argentina and Cabruja Films from Bolivia.

6. Theme of the Year

The theme of the year revolves around a broad question about the narratives in the fiction produced by each country, what their ways of narrating, their themes and characters are like. A global response in the Uruguayan case could be summarized by pointing out that in recent years the stories told in Uruguayan television fiction were presented in two formats, the series and the unitary one, and were distributed between educational fiction, comedy and drama. The six titles released in the last five years were distributed equally between these three types of narration and the spectrum of their possibilities. We will focus here on the two releases of the year, emphasizing the main features in terms of their themes, characters and narrative resources.

6.1. *Temporario*

The second season of this fiction maintains the same characteristics as the first one: a self-conclusive narrative seriality, with each episode presenting a different theme, with different characters in a story that closes in each episode. The only connecting element between the episodes that gives it the character of an anthology is the space where all the action takes place: the temporary rental apartment (Airbnb style) that

gives its name to the fiction. There are neither exteriors, nor movement to other interior settings.

The anthology nature of this fiction allows it to cover a wide range of themes: the elderly, Alzheimer's, the love encounter between older people, prejudice and fears, gender identity, sexual abuse. The format also makes it possible to use a diversity of tones, so that some episodes are clearly dramatic and others introduce humor and satire.

Thus, the episode entitled "Don't Open" presents a situation of intrafamilial sexual abuse that is revealed through suggestion, some gestures introduced progressively accompanying the discovery process made by the mother of the abused young woman. On the other hand, in "Neighbors on Alert", in a tone closer to comedy, characters satirize this type of neighborhood associations and the prejudices that define their behavior.

The narrative structure usually follows a linear temporality, except in one of the episodes in which the chronological order is altered. The secret works as a narrative engine in almost all episodes. Sometimes, as in "Inheritance", the secret articulates a narrative structure in sections organized around each of the characters, aspiring to the inheritance. The tension is sustained around a truth that each character has to reveal to access their share of an inheritance. Other times, the secret is part of the twist of the outcome, revealing a hidden identity or action. With different degrees of relevance, revelation or anagnorisis are resources used in all episodes.

6.2. *Alí Sócrates*

It is a comedy in eight episodes that focuses on the project of two friends, Santi and Gonza, who want to open a gym, but pursue different aims. Gonzalo Pacherotti is devoted to martial arts, he is a fighter, and wants the gym to be dedicated to training in these disciplines. Santi has the dream of earning a lot of money in order to win back his ex-girlfriend, Pamela, Gonzalo's sister. His actions are going to be more marketing-oriented, to include fitness activities, which are in conflict with Gonza's convictions. They have a period of five months to recover the space of an old deteriorated gym, so that the owner agrees to sign the contract. That is the goal that unites the characters: making the *Alí Sócrates* gym possible.



It is a narrative that is organized in a continuous and cumulative seriality around the obstacles that must be overcome to achieve the common objective of the two main characters. However, linked to this central plot, parallel plots develop: that of the Santi-Pamela relationship, the Gonza-Magui relationship, the plan of Donald and his henchmen.

In terms of themes, the series includes classic themes such as the pursuit of a dream, friendship or love, but also others such as bullying, the use of social networks and the phenomenon of cancellation. The situations and conflicts are presented in comedy mode, underlining the ridiculous, with caricatured situations and characters or resorting to parody which introduces a certain critical perspective. The song that identifies the series, *Superpoderes del Gym*, constitutes another original component of this fiction.

The two main characters, on the one hand, have typical traits of the canonical hero, in the sense that they pursue a desire and will have to face obstacles, but on the other hand, they have traits that distance them from a heroic dimension: they are two young men in a precarious situation, such that they must live in the gym and share the mattress to sleep on; one wants to be champion, but doesn't seem close to achieving it, the other fantasizes about winning Pamela back and refuses to see the signs of her rejection.

The secondary characters adopt either the role of auxiliaries or adversaries, but in one function or another their caricature or parody features are accentuated. The comedy is sometimes sustained by the physical presence of the character, as is the case of Mateo, who supposedly goes to the gym to train and always carries a bag of biscuits in his hand and a construction helmet on his head; other times in their gestures and actions, such as Burton's choreographies, the language in which English terms are inserted or the parody of YouTubers in the character Willy de la Gente.



The narrative structure organized around the achievement of an objective implies the presence of antagonists that generate obstacles: one is Agustín who boycotts the project and another is the gang of criminals that intends to use the gym to carry out a robbery. The false names of the band members parody Donald Duck and his three nephews, Huey, Dewey and Louie, while their clumsiness constitutes another component of the humor.

The narrative begins *in media res*: the viewer encounters images of an advertising spot, while Santi's voice-over describes it, trying to get Gonza to imagine what that advertising piece would be like, which for now is only in Santi's mind, but that the viewer can see. The aesthetics of the images refer to martial arts films, in addition to having the marks or imperfections of a running VHS tape. The illusion dissolves when the two friends appear talking in the gym and talking about what it would cost to do that promotion. In this dialogue, the differential features of the characters are defined, as well as the central narrative arc.

Although the temporal development of the story is linear, different types of temporal alterations and disruptions occur throughout the narrative. Thus, at the beginning of the second episode ellipsis is used, introducing Gonza the day after a fight that we did not see and was not announced in the previous episode. The character is only shown walking down the street with a wound on his nose as a visual clue and then references in different moments of the dialogue.

The type of use of the flashback in this fiction has the particularity that two times overlap: the present in which an action is being carried out and the past. The scenes from the past are fragmentarily embedded, like small flashes, in the development of the present action: while Santi tells Ruben, the owner of the gym, about the questionable behavior of his son Agustín, images of the action of this character are introduced. These fragments function as a contrasting counterpoint to Santi's words that reinforce the comedy tone.

Temporal anticipation is also used, but here it involves the superposition of two times: the present and the future. Thus, in the last chapter, Magui relates a plan to deceive Agustín, but while her voice narrates, her words come out of the mouths of the different characters with images of the future phases of execution of the plan.

The humorous effect arises from the contrast between the female voice and the image of Agustín gesturing Magui's words. Instead of the typical flashforward in which we return to the present, in this case the movement to the future leaves the action installed at the time of the execution of the plan.

A moment of disruption of time and space occurs in chapter 7 when Gonza mistakenly takes a drug thinking it is a paracetamol pill and begins to hallucinate. Then, the time-space of the hallucination and the action in the present of the criminals who take over the gym develop in parallel. Gonza physically shares that time and space, but a parallel dream world moves that is visually marked with a treatment of the color and strokes of the image as if it were an animation. In this parallel world the heroic action of the character operates in rescuing his lady, with parodic allusions to this topic, which are added to others such as the reference to the Ninja Turtles.



One of the particularities of this fiction regarding the breaking of narrative linearity is the incorporation of small sections that are added after the end credits. These fragments, with the VHS aesthetic, sometimes parody a movie, but starring one of the characters the youtuber Willy de la gente or the advertisement for an exercise method to lose weight. In addition to these small pieces, each chapter is linked to the parody of question and answer programs. With the titles and header that announce the program *If you don't know, call*, the viewer may think that it is an independent program, but the host immediately appears on the scene and summons one of the characters of the series as a participant.

In conclusion both fictions have a thematic spectrum linked to current concerns and with characters from an average social profile, which could lead to broad identification. From the point of view of narrative resources, the comedy showed a broader and infrequent range of resources in the Uruguayan fictions that we have studied within the framework of Obitel.

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VENEZUELA: IN SEARCH OF THE LOST MELODRAMA

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Autores:

Zicri Colmenares-Díaz¹ (<https://orcid.org/0000-0002-1384-737X>)

Luisa Torrealba* (<https://orcid.org/0000-0001-7739-0367>)

Morella Alvarado* (<http://orcid.org/0000-0002-4124-0575>)

Martin Hahn* (<https://orcid.org/0000-0001-7546-1432>)

Introduction

In 2023, the national fiction premiere in Venezuela continues in the search for the lost melodrama. In the midst of a complex political and economic context, HispanoTV invested in the production of *Dramáticas*, a series conceived to be broadcasted simultaneously on free-to-air television and VoD platforms. The purpose is to reach and reconnect with local audiences and with the more than 8 million Venezuelan migrants who have left the country in recent years because of the complex humanitarian crisis. Rebroadcasts and imported fictions from both the Ibero-American region and, Northern Europe and Asia rule the Venezuelan screen.

1. The Venezuelan audiovisual context in 2023

1.1. Free-to-air television in Venezuela

Figure 1. National free-to-air television chains/channels in Venezuela

Private channels (9)	Free-to-air channels (11)
Canal I	123 TV
Globovisión	ANTV - Fundación Audiovisual Nacional de Televisión
La Tele Tuya (TLT)	Ávila TV
Meridiano Televisión	ConCiencia TV
Televen	ShowVen
TV Familia	Colombeia. La televisora educativa de Venezuela
Vale TV	Tele Sur -La Nueva Televisión del Sur C.A.
Venevisión	TVES - Fundación Televisora Venezolana Social
Vepaco TV	TV FANB
	Vive TV - Visión Venezuela
	VTV - Compañía Anónima Venezolana de Televisión
TOTAL CHAINS = 0	
TOTAL CHANNELS = 20	

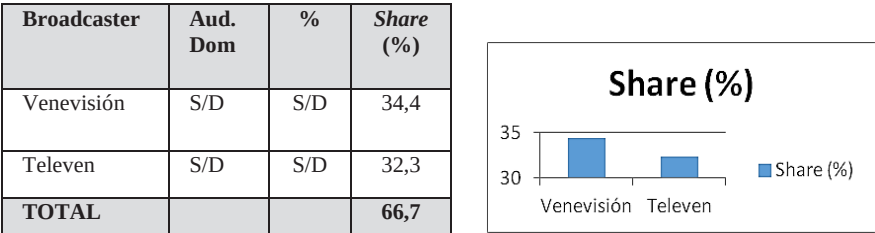
Source: Obitel Venezuela

¹ Universidad Autónoma de Baja California, México.

* Universidad Central de Venezuela.

During 2023, 20 free-to-air channels broadcast nationwide, 11 belong to the public sector and nine to the private sector. There was a slight decrease in free-to-air television. The television station Alba TV, which is financed with public funds and whose objective was to promote the articulation of social movements in Latin America, ceased broadcasting in January 2023. However, there are more public than private channels. In public television stations, propagandistic contents prevailed, while in private channels, informative, fiction and entertainment contents predominated. In news segments, a pattern of self-censorship was noticeable regarding information that could be considered critical of the national government. On the other hand, the state-owned television station Corazón Llanero, whose contents were focused on the promotion of traditional Venezuelan music, was transformed into the channel Show Ven, which is distinguished by having a high definition signal and focusing its contents on the transmission of music videos of various genres, talent contests and retransmission of live recorded concerts.

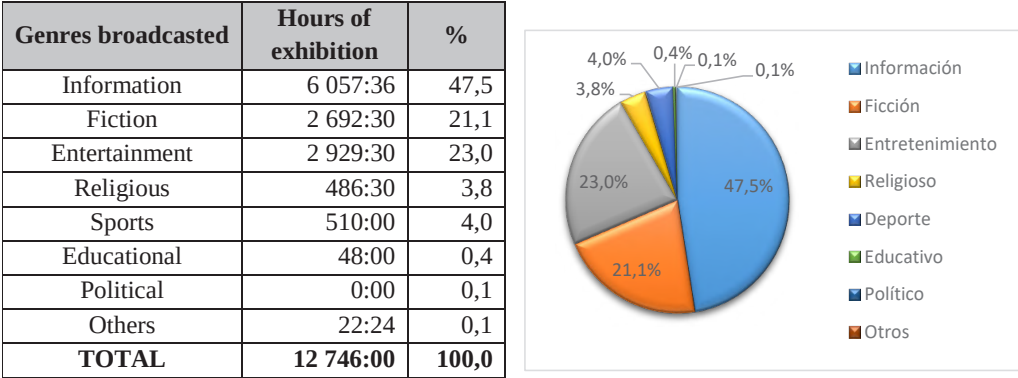
Graph 1. TV rating and share per station (rating per household)



Source: BB Media (10 most watched programs between 29/01 and 04/02 2023).

There is no complete and systematized information because there is no company in the country that keeps an exhaustive record of the rating and share of free-to-air television. The media and advertising agencies usually hire the services of transnational companies that carry out focused measurements, the results of which are confidential. However, partial data was obtained, generated by BB Media and published by the Produ portal, about the 10 most watched programs from January 29 to February 4, 2023. The results in Graph 1 are the result of the average of such data, in order to have a reference on the audience behavior of the two most watched channels: Venevisión and Televen, the two largest private television stations in the country.

Graph 2: Genres and hours broadcast in TV programming



Source: Obitel Venezuela

For Graph 2, a partial sample was taken from the programming of three television channels (Venevisión, Televen and Globovisión) during 24 weeks. The genre that occupied the most space was news. In 2023, several relevant events took place in the process of consensus building for the return of democratic institutions in Venezuela. A negotiation table was established between the government and sectors of the Unitary Democratic Platform, to define agreements that would guarantee that the 2024 presidential elections in Venezuela would be free and competitive. The opposition sectors carried out the primary election to select their candidate for the 2024 presidential election. The process against Venezuela at the International Criminal Court continued, to determine whether to resume the investigation for the alleged commission of crimes against humanity in the country. All these events had an impact on the relevance of news information, occupying the largest number of hours in the programming. Entertainment and fiction content occupied the following positions in relation to the number of hours shown.

1.2. Pay TV and VoD platforms in Venezuela in 2023²

At the beginning of June 2024, the *Comisión Nacional de Telecomunicaciones* (CONATEL) had not published the indicators of the telecommunications sector in the country for the year 2023; this opacity of the sector was compounded by complaints from the main pay TV operators about piracy in the sector. According to Francisco Escutia, CEO of the consulting firm Laapip, In Venezuela, 16% of households engage in traditional piracy and 30% consume illegal pay TV (El Pitazo, 2023).

The main private pay TV companies, SimpleTV, Inter, NetUno and Súper Cable, continued operating. As well as the state-owned service Cantv Televisión Satelital.

²There are no official and updated figures on the pay TV sector in Venezuela, nor on its audience, which prevented the elaboration of Table N° 2, of the most watched pay TV channels in Venezuela during 2023.

The pay TV services of the Venezuelan channels IVC Networks, Venevisión Plus, Sun Channel (tourism), Escuela+ (educational) remained active. Both IVC Networks and Venevisión Plus included the transmission of serialized fiction in their programming.

In addition to the above, there is no public data on the penetration of VoD platforms in the country. Journalistic reports state that Netflix is the platform with the most users. In Venezuela, the premiere of the second season of the fiction series *Pálpito*, by Venezuelan writer Leonardo Padrón, on April 17, 2023, turned out to be an important event. Although this fiction was filmed in Colombia and Turkey, it incorporated Venezuelan actors Mariaca Semprun and Ernesto Calzadilla, thus reinforcing the bond and acceptance by the Venezuelan audience, which had already been achieved with the first season. A week after its premiere, it accumulated more than 52 million hours of playback, making it the most watched series on the platform worldwide. It was the most watched series in 64 countries in its first week, including Venezuela, according to Netflix itself (Gaitán, 2023).

Victor Lara (2023) made an approach to the panorama of VoD platforms in Venezuela, presented through a survey through an online media. As a result, he found that only 20.06% of the 426 readers who participated have a subscription to any streaming platform. Of these, 54.25% indicated that they pay for more than one platform and the most watched were Netflix (85.10%), Disney+ (30.85%), Amazon Prime (29.78%), Star Premium (18.08%), Blim TV and Magis TV (with 17.02%, each) and Pluto TV (14.89%).

The device most used to access the platforms' content was the smartTV. The majority (47.9%) indicated that they obtained the subscription through the purchase from screen vendors and not by being directly subscribed with the platforms. The most consumed contents were series (94.68%), movies (89.36%) and documentaries (52.12%), which reveals that fiction consumption is the one that prevails in streaming services. At the time the survey was published, June 2023, the Venezuelan series *Dramáticas* had not yet been released, so it did not appear in the applications for streaming consumption.

1.3. Sources of funding in the audiovisual sector

In 2023, the government's *Comisión Nacional de Telecomunicaciones* (CONATEL), through its *Fondo de Responsabilidad Social*, which is funded by the telecommunications sector tax contributions made by operators, financed diploma courses in audiovisual production and an initial training program in television and audiovisual creation, to stimulate the development of audiovisual productions in the country. It also kept open throughout the year the reception of projects to finance the execution and commercialization of audiovisual productions by independent producers.

These funds are granted on the basis of the Technical Regulations for the administration, allocation, follow-up and control of the resources of the Fondo de Responsabilidad Social.

Although there was little public information on the productions resulting from the financing with this fund, it was learned that one of the productions was the documentary “Camino a Carabobo, todos por la Patria”, identified by its makers as part of the docufiction genre. Made by Venezuelan filmmaker Rubén Hernández Remón, it narrates the actions undertaken by the Liberator Simón Bolívar, which led him to win the independence battle of Carabobo.

The series *Dramáticas* was the only Venezuelan fiction production that premiered in 2023, under the production of Hispanomédios with an alliance for broadcasting in open signal with Venevisión. It was conceived as a fiction product to be broadcast in parallel in broadcast and streaming, and financed with private resources from Hispanomédios itself and various Venezuelan commercial brands that served as sponsors.

1.4. Communication policies

The television sector in Venezuela operated, throughout 2023, under the precepts of the *ley de Responsabilidad Social en Radio, Televisión y Medios Electrónicos* (Resorte-Me); the *Ley Orgánica de Telecomunicaciones*; and the *Ley Constitucional Contra el Odio, por la Convivencia Pacífica y la Tolerancia*, which have a punitive nature, which promoted self-censorship of content that could be considered critical of governmental management. The national government, through CONATEL, continued with the expansion policy of its *Televisión Satelital Abierta* (FTA) project, with nationwide coverage, which offers access to open signals from 56 television channels and 11 radio stations.

Television stations include in their programming sports, news and entertainment content, both national and international. Although access to content is free of charge, not all citizens have the possibility of enjoying FTA; to access this service it is necessary to purchase a decoder kit, antenna and accessories, valued at 1,587.75 Bolívars (equivalent to US\$44). The minimum wage in Venezuela is 120 Bolívars (US\$3.28), which means that 14 minimum wages would be required to purchase the kit.

1.5. Digital and mobile connectivity infrastructure

At the time of writing this chapter, May 2024, official telecommunications sector statistics published by CONATEL were not yet available, so alternative sources of information were used to provide an approximation of the sector's performance. According to Datareportal's *Digital 2024: Venezuela* report, the number of Internet users in Venezuela reached 17.94 million with a penetration of 61.6%. The number of cell phones with active lines reached 21.37 million, which implies that 73.4% of

the population had access to this service. Although the data in the referred report are from January 2024, they are the closest records to the end of the year 2023.

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

In the last six years, free-to-air television and especially those channels that produced fiction (Venevisión and Televen) recorded a drastic drop in the creation of series, telenovelas and miniseries. However, in the year 2023, what some people linked to entertainment called “the return of melodramas to Venezuela” or “the reactivation of productions in Venezuela” took place, due to the premiere of the series “*Dramáticas*”. However, melodrama continues to be lost from Venezuelan screens, a series of only 12 episodes does not mean a return of melodramas, but rather, it is evidence once again that television stations in the country cannot afford national productions.

TABLE 1. Premiere fictions screened in 2023
(national, foreign Obitel and co-productions)

UNRELEASED NATIONAL TITLES– 1	16. <i>Los Ricos También Lloran</i> (telenovela-México)
Venevisión	17. <i>Tu Voz Estéreo</i> (serie-Colombia)
01. <i>Dramáticas</i> (serie)	Venevisión
UNRELEASED FOREIGN TITLES– 26	18. <i>Amo Despertar Contigo</i> (telenovela-México)
La Tele Tuya	19. <i>Go! Vive a tu Manera</i> (serie-Argentina)
02. <i>Isla Paraíso</i> (telenovela-Chile)	20. <i>Imperio</i> (telenovela-Brasil)
03. <i>Juncal</i> (serie-España)	21. <i>La Mexicana y el Güero</i> (telenovela-México)
04. <i>Sabuesos</i> (serie-España)	22. <i>La Rosa de Guadalupe</i> (unitary-México)
05. <i>Vida y Pasión - Paixão</i> (serie-Portugal)	23. <i>Mi Secreto</i> (telenovela-México)
Televen	24. <i>Papá a Toda Madre</i> (telenovela-México)
06. <i>Café con Aroma de Mujer</i> (telenovela-Colombia)	25. <i>Querer sin Límites</i> (telenovela-Brasil)
07. <i>Corona de Lágrimas 2</i> (telenovela-México)	26. <i>SOS me Estoy Enamorando</i> (telenovela-México)
08. <i>El Rey, Vicente Fernández</i> (miniserie-Colombia)	27. <i>Totalmente Diva</i> (telenovela-Brasil)
09. <i>Entre Sombras, Secretos que Marcan el Alma</i> (serie-Colombia)	28. <i>Los Elegidos</i> (serie-EEUU)
10. <i>La Desalmada</i> (telenovela-México)	UNPUBLISHED OBITEL CO-PRODUCTIONS - 2
11. <i>La Herencia. Un Legado de Amor</i> (telenovela-México)	La Tele Tuya
12. <i>La Ley del Corazón 2</i> (telenovela-Colombia)	29. <i>Amores que Engañan</i> (unitary -EEUU, México, Brasil)
13. <i>La Madrastra</i> (serie-México)	30. <i>Historias de Diván</i> (telenovela-Argentina, Uruguay)
14. <i>La Reina del Flow 2</i> (serie-Colombia)	
15. <i>Los Archivos del Cardenal</i> (serie-Chile)	TOTAL UNRELEASED TITLES: 29

Source: OBITEL Venezuela

As shown in Table 1, foreign titles lead the premieres in free-to-air television. Mexican productions continue to be the main alternative for Televen and Venevisión channels. It is worth mentioning the wide offer of serialized fiction productions to which Venezuelan viewers have access. Outside the Obitel scope fifty-eight titles were broadcast from China (11 titles); South Korea (18); Denmark (1); Philippines (2); Russia (4); Turkey (14); Belgium, France, Iceland, Italy and Lebanon (1 title each). The above shows how geopolitical factors have an impact on the exhibition of serialized fiction and have repercussions on a diversity of supply on the screen that is difficult to match in other Ibero-American contexts.

As a result, Venezuelans have the possibility of interacting with content generated more than three decades ago (*Pobre negro*, 1989, RCTV), or with unusual content (Belgian, Danish or Nordic). The information on these fictions is not included in the table because they do not belong to the Obitel scope, but it shows the need to complete the programming as a consequence of a reduced national production. In any case, it is relevant to point out that international productions shown in the country increasingly allow audiences to get to know new scripts and a diversity of cultures, contexts, genres and styles that are not present in Venezuelan television.

Venevisión aired the only previously unreleased national title, *Dramáticas*, which narrates a sequence of events in a television channel on the verge of bankruptcy, where renowned and experienced actors and actresses unite with the objective of rescuing it, which ironically resembles the reality of national production companies. It also broadcasted several non-fiction programs, such as the *Festival de la Orquídea*, a musical event held in the city of Maracaibo, in the state of Zulia, which was broadcast after 11 years of absence on this channel. With the participation of national and international artists, who were awarded for their talent, this program obtained a 71% share (Venevisión, 2023a). In addition, they broadcast several sporting events such as the Professional Baseball League (LVBP), the South American Soccer Confederation Cup (Conmebol), the Major League Baseball (MLB) and the Venezuelan Soccer Federation League (Futve), and the World Baseball Classic, which obtained a 53.8% share between March 8 and 21 (Venevisión, 2023b).

TABLE 1b. Exhibition of rerun titles during 2023
(national, foreign Obitel titles and co-productions)

REPEATED NATIONAL TITLES – 9	REPEATED FOREIGN TITLES - 7
Televen	La Tele Tuya
01. Amor Infiel (telenovela)	10. A Garota da Moto (telenovela-Brasil)
02. Escándalos (unitary)	Televen
03. Mi Prima Ciela (telenovela)	11. El Rey del Ganado (telenovela-Brasil)
04. Nadie me Dirá como Quererte (serie)	12. Lo que Callamos las Mujeres (serie-México)
	13. UEPA! Un Escenario para Amar (serie-México)
Venevisión	14. Una Familia de Diez (sitcom-México)
05. Amantes de Luna Llena (telenovela)	15. Xica Da Silva (telenovela-Brasil)
06. Arroz con Leche (telenovela)	
07. Ciudad Bendita (telenovela)	16. Los Elegidos (serie-EEUU)
08. Entre tu Amor y mi Amor (telenovela)	
09. Voltea pa' que te Enamores (telenovela)	TOTAL OF REPEATED TITLES: 16

Source: OBITEL Venezuela

For several years, reruns have become an important tool to cover the absence of national productions in television programming. As in the year 2022, the exhibition of reruns (Table 1b) was mostly made up of titles premiered in the 2000s. Two productions from the mid-1990s stand out: the Brazilian telenovela Xica Da Silva (1996) and El Rey del Ganado (1996).

TABLE 2. National fiction formats for release in 2023
and their evolution in the five-year period

Format	Titles						Hours					
	2019	2020	2021	2022	2023	Total	2019	2020	2021	2022	2023	Total
Telenovela	0	0	2	0	0	2	0	0	300:00	0	0	300:00
Series	2	1	0	1	1	4	35:00	3:00	0	240:00	9:00	287:00
Miniseries	0	0	1	0	0	2	0	3:00	6:00	0	0	9:00
Sitcom	0	0	0	0	0	0	0	0	0	0	0	0:00
Unitary	0	0	0	0	0	0	0	0	0	0	0	0:00
Docudrama	0	0	0	0	0	0	0	0	0	0	0	0:00
Others	0	0	0	0	0	0	0	0:55	0	0	0	0:00
Total	2	1	3	1	1	8	35:00	0:55	306:00	240:00	9:00	596:55

Fuente: OBITEL Venezuela

At the beginning of this section it was mentioned that free-to-air television channels (Venevisión and Televen) experienced a significant decrease in fiction production in recent years. Table 2 shows an apparent continuity in the premiered national fiction. However, the reality is that in 2023 only one series produced in the country was premiered, *Dramáticas*, with a duration of 9 hours. In 2022 it was

the miniseries *Carabobo*, *Caminos de Libertad*, entirely financed with public funds, with a duration of 240 hours; and 2021 shows 300 hours corresponding to two tele-novelas premiered and broadcast by RCTV Internacional in 2001 and 2009, which had not been premiered on Televen. Therefore, the scarce 9 hours of production does not represent an increase when compared to the production that took place in the 80's and 90's when Venezuela was internationally known for its dramas.

TABLE 3. Premiere fictions released in 2022: Countries of origin

Country	Titles	%	Hours	%
NATIONAL (total)	1	3	9:00	0
OBITEL COUNTRIES (total)	28	97	1873:45	100
Argentina	1	3	10:15	1
Brasil	3	10	444:25	24
Chile	2	7	124:55	7
Colombia	6	21	305:00	16
Ecuador	0	0	0:00	0
España	2	7	155:00	8
EE.UU. Hispanos	0	0	0:00	0
México	11	38	728:15	39
Perú	0	0	0:00	0
Portugal	1	3	91:40	5
Uruguay	0	0	0:00	0
Venezuela	1	3	9:00	0
CO-PRODUCTIONS (totales)	2	7	14:20	1
National Co-productions	0	0	0:00	0
Obitel Countries Co-productions	2	7	14:20	1
TOTAL	29	100	1882:45	100

Source: OBITEL Venezuela

Table 3 shows that 97% of the productions released correspond to international productions. Mexico and Colombia top the list as the countries with the most productions shown on the screens (11 and 6 respectively), while national premieres are in second place with only one production.

TABLE 4. National and Obitel fictional formats shown in 2023

Format	Titles				Hours			
	Nationals	%	Other Obitel	%	Nationals	%	Other Obitel	%
Telenovela	0	0	16	57.1	0	100.0	1395:20	74.1
Series	1	100.0	9	32.1	9:00	0.0	446:40	23.7
Miniseries	0	0.0	1	3.6	0:00	0.0	27:05	1.4
Sitcom	0	0.0	0	0.0	0:00	0.0	0:00	0.0
Unitary	0	0.0	2	7.1	0:00	0.0	13:40	0.7
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	1	100.0	28	100.0	9:00	100.0	1882:45	100.0

Source: OBITEL Venezuela

The telenovela is the leading format in national and Ibero-American fiction, exhibited for several years. Since the 1980s and even before, telenovelas became an essential part of the entertainment of Venezuelan citizens due to their content, quality and stories linked to everyday life. It could be understood that it is part of the culture, therefore, television stations prefer this format over others.

TABLE 5: 5 Most watched titles in 2023³

	Title	Chanel	Producer (country)	Format/Genre	No. of chap/ep in 2022	Time Band	Rating	Share
1	<i>Querer sin límites</i>	Venevisión	TV Globo (BR)	Telenovela	150	Prime time		
2	<i>La rosa de Guadalupe</i>	Venevisión	Televisa Univisión (MX)	Unitary	22	Prime time		
3	<i>Mi Secreto</i>	Venevisión	Televisa (MX)	Telenovela	80	Afternoon		
4	<i>Papá a toda madre</i>	Venevisión	Televisa (MX)	Telenovela/romantic comedy	20	Afternoon		
5	<i>Imperio</i>	Venevisión	Rede Globo (BR)	Telenovela	80	Prime time		
Total of National Productions: 0				Original foreign scripts: 5				
0%				100%				

Source: Data obtained from the publication of information generated by BBmedios- OBITEL Venezuela.

There is a strong inclusion of foreign premieres outside the Ibero-American sphere in all channels, such is the case of Turkish series that dominated the screens, among which the following stand out: *Amor* (A.Ş.K.); *Amor Bajo el Mismo Techo / Amor en la Azotea*; *Amor en Renta* (Kiralık Aşk); *Amor Manchado* (Leke); *Derecho a Vivir*,

³ For editorial reasons, Table 5 only includes 5 titles and not 10. One of the excluded titles corresponds to a Turkish series and the rest were repeats.

(*Hayat Yolunda*) *Así es la Vida*; *Nueva Vida*; *Rosa Salvaje* (Gülizar); *Soñando Contigo* (Meleklerin Aski); *Las Mil y Una Noches*; *Su Nombre es Leyenda* (*La Leyenda, El Sobreviviente*); *Pájaro Soñador*, (*Erkenci Kus*) and of course, *¿Qué Culpa Tiene Fatmagül?* Which ranked first among the most watched titles, but is not registered in Table 5. According to Venevisión's Instagram account, this telenovela had a 61.1% share⁴ (Venevisión, 2023d).

Other titles that topped the most watched titles were the Venezuelan telenovela *Arroz con Leche*; the Mexican series *Una Familia de Diez*, the U.S. series *Los Elegidos* and the Brazilian telenovela *Xica Da Silva*, which first aired on Televen's screens between 1997 and 1998, with ratings successes; this is the third time it has been broadcast on Venezuelan screens (twice on Televen and once on La Tele). The only national production, *Dramáticas*, was not among the most watched.⁵

3. VoD 2023 Monitoring

3.1 VoD platform market in 2023

The beginnings of Internet television in Venezuela and its different models date back to the first decade of the twentieth century. The references, as in other contexts, are associated with the distribution of content hosted on platforms that function as repositories, as in the case of YouTube. Subsequently, it would move towards the model proposed by Bill Gates as "Connected TV" with amplification of its action through the TV stations' own sites, mobile applications and social networks.

It is the Covid 19 pandemic, in 2020, which gives a boost to VoD in Venezuela. The leading role is played by Netflix, but there are several VoD options available, including Amazon Prime, Disney+, Disney+, Paramount+, Apple TV+, Google TV, Paramount+, Star+, HBO Max, Movistar+ Lite, Prime Video, Filmin and SKY. Although there are official limitations on the use of foreign currency in the country, at present, the economy is dollarized and most transactions are made in that currency. Thus, from some banking institutions and applications, payments are made for the contracting of VoD services, although, as mentioned above, some households consume this service through piracy.

In the case of Netflix, the most popular platform in the country, "the service can be [signed up] from a Venezuelan IP address with any Visa or Mastercard debit or credit card, as well as with Payoneer, Facebank, Wally, Zinli, Bancamiga, and in general any card that admits US dollar charges" (Hernández, 2023). However, the options of

⁴ Venevisión's Instagram account indicates that it was in a sample of 3500 set top boxes, but it does not mention the measurement company.

⁵ Table 6 about the audience profile of the most watched titles: gender, age, socioeconomic level was omitted due to the lack of information available for its presentation.

“renting” and “borrowing” from foreign domiciled accounts are maintained as an economic option that allows expanding the socioeconomic range to sectors C, D and E for access to content.

In addition to the above, Venezuelan companies have increased the range of Internet television services offered by Venezuelan companies over the last two years: the launch of the Venezuelan platform Inter Go, which offers Pay TV channels, on-demand content and 24 exclusive signals. Net Uno Go, Streaming SimplePlus and VepacoNet make up the private offer. The first two are part of well-known subscription television services. While the third one “belongs to Grupo Trust Mediático, [...] a corporation that groups several companies related to advertising (Vepaco), marketing, telecommunications and legal and financial advisory services” (Wiki Vepaco, n.d.), but there is no possibility of obtaining information related to the number of subscribers, as well as figures on the profits obtained in the country, due to the opacity already mentioned at the beginning of the chapter.

3.2. Content offer from local VoD platforms in 2023 (national, regional within the country)

Faced with the private offer of services, Venezuelan television stations opted to offer their programming free of charge. It is especially interesting to highlight those that include national and international serialized fiction. The first service was offered in July 2020 by Radio Caracas Televisión (RCTV):

RCTV created its own application, in order to place all its series and movies and other productions on a completely free and legal platform, in addition to removing all its content on YouTube and redirecting it to the platform (Hollogram Television, 2022).

The application, which had become a luxury option to access the contents of the Venezuelan channel that is banned from broadcasting in Venezuela, switched to a content syndication plan to TV channels and other platforms.

Taking advantage of the agreements with companies such as **Tubi TV** and **Pluto TV**, some telenovelas were delivered to these platforms, but the final blow, and the reason why I write this article, It was when RCTV signed an agreement with what is now TelevisaUnivisión not only to add its content, but to create linear channels with all the novels of this producer (Hollogram Television, 2022).

After this, the main official television channel -with a high propagandistic profile- Venezolana de Televisión, also joined the VoD offer in the country. VTV IP is part of the official free offer, which complements Miraflores TV, active since 2017.

3.3. VoD analysis in 2023: national premiere fiction and co-productions

Table 7 shows the *Dramáticas* series as the only content broadcast through the Hispano TV service. However, it is important to note that there was a wide range of Venezuelan serials on VoD, especially through the platforms Apple TV+, Venevisión Play, Vix, Novelisima and Pluto TV which, although most were released by open signal, even more than 20 years ago, 169 of these titles were first broadcast on these platforms. Even when some titles are repeated, and by excluding repetitions, the offer is reduced to 112 titles, it is a necessary data, because although VoD content is not being created, Venezuelan fiction has a strong presence in the aforementioned platforms and contributes to the country’s audiovisual memory.

TABLE 7: National fiction and co-productions broadcasted in 2023 on VoD

NATIONAL PREMIERE TITLES
HispanoTV – 1
01. <i>Dramáticas</i> (serie)
Total: 1

Source: OBITEL Venezuela

For the preparation of table 7. National fiction and co-productions broadcasted by Tubi TV, Prime Video and Simple TV were not taken into consideration. Nor did the offer of Televen Stream, since it was last included a foreign fiction in the VoD service.

3.4. Narrative characteristics of VoD in 2023

Dramáticas is the one Venezuelan premiere production aired through VoD during the year of 2023. Its premiere on October 16th, was simultaneously broadcasted on free-to-air channels and through the streaming platform HispanoTV. This platform includes a catalog of Venezuelan series and *telenovelas*, historically known, that can be accessed for free and from any part of the world. However, to be able to watch *Dramáticas* from abroad, the cost up until mid 2024, was 4,99 dollars. The series consists of 12 episodes of 44 through 45 minutes in length, excluding the last episode that is 53 minutes long; it foreshadowed a timid reactivation of the national television industry, although after the series there was no continuity on the development of new production. The series unfolds the story of:

Two rookie producers [who] will make a telenovela to bring a channel that has not made a production in years back to the market; so with a low budget, many lies and using this channel’s successful telenovelas as reference, they bring together three great actors and

a leading man in the genre, not aware that the past of these stars is going to make them live an actual melodrama behind the scenes (HispanoTV, 2024).

In this production the relationship between the media ecosystem and the point of view “from the inside” is highlighted as the main storyline, since it revolves around a bankrupt traditional television channel, they build their narrative from there and make their own aesthetical propositions. It includes elements from the digital culture that enrich the language and grammar of television, for example: live broadcasts through a smartphone, selfies, video calls, the usage of social media, etc. In the series, the narrative pays tribute to the television of the past, and resorts to self-referentiality as a narrative resource, which creates an innovative theme.

Although the main storyline revolves around Scarlet Ortiz, Luis Geronimo Abreu, Roxana Diaz and Lupita Ferrer, who are the main characters in the series, the “telenovela” and the behind the scenes of that same telenovela, the rest of the cast contributes in a balanced and accidental manner to the construction of the plot. The lines and appearances do not highlight some performances over others. Each actor and actress contribute their own special touch; sometimes over-acted performances, typically in comedies, that hinders the narrative and try to cause through humor that the audience is disconnected from day to day life problems.

On the series they make use of the camera movement known as handheld or “*cámara en mano*”, it is a style that consists of loose movements and sometimes unsteady ones, that intend to bring a sensation of realism and dynamism but sometimes are distracting. The final episode shows, that thanks to the success reached by the *telenovela* and the investors, the channel recovers from bankruptcy, but the scene is far from the reality of the Venezuelan fiction, because even though *Dramaticas* was considered a return of fiction, the channels do not count with an investment that allows them to keep consistent productions throughout the years yet.

4. Interactivity and audience participation

On April 14th it was announced over social media, through Hispanomedios’ (@hispanomedio) and producer Daniel Ferrer Cubillan’s (@danielferrerc) Instagram, the signing of a contract between Venevision and Hispanomedios for the broadcast of *Dramaticas*. With a total of 7 275 “likes” and 746 comments, the post marked the beginning of a series of posts to promote the before, during and after of the launching of Daniel Alfonso Rojas and Daniel Ferrer’s original series. At first, “it was believed that Venevision would go back to the drama production, but wasn’t this way” (Brizuela, 2023, para. 5), it was only the free-to-air channel, where the 12 episodes were broadcasted. According to an interview to Andres Badra, current vice president and general

manager of Venevision, the TV station does not have the resources to invest in the talent for a project as big as *Dramáticas* “To have a mildly competitive product you need an investment so high in technology and talent, behind and in front the scenes, that today’s Venezuelan market doesn’t have the amount of money to back up a *telenovela*’s production” (Brizuela, 2023, para. 5).

Nevertheless, with the #RegresanLosCulebrones and #hechoenvenezuela, Venevision and Hispanomedios reported the confirmation of each actor and actress that would take part in the series through videos that showed the most important work made by the recognized stars of Venezuelan television, along with an advertisement about their return to the screens. This marketing strategy generated positive opinions about the new production and criticism about the country’s situation. Such is the case of the user @deybysrodriguex who, on May 26th 2023, commented:

So this way the media and the entertainment industries in my country validate @nicolas-maduro’s dictatorial regime, because (sic) if there is money to make soap operas but not for the people’s stomach (sic) then you are sending a message of validation to the world, saying that Venezuela is fixed (sic) when my country’s democracy is still kidnapped

The posts with most interaction were the ones made by Ferrer’s Instagram account, with the confirmation of the actress Rosmeri Marval, who had 70 421 “likes”, and Escarle Ortiz’ with 35 432. On June 7th, the production officially began with the participation of Venezuelan and latin american *telenovelas*’ recognized stars such as: Tania Sarabia, Amanda Gutiérrez, Elba Escobar, Javier Vidal, Mimí Lazo, Lupita Ferrer, Hilda Abrahamz, Dora Mazzone, María Antonieta Duque, Aroldo Betancourt, Víctor Drija, Fernando Villate, Jorge Palacios, Isabella Pérez, Rosmeri Marval, Arán de las Casas, Mariángel Ruiz, Kiara, Jalymar Salomón and Wanda D’ Isidoro.

In other words, the greatest advertising was through the Instagram accounts of @hispanomedio, @danielferrerc and the actors and actresses’. And, even though the producer of the drama posted information about the series from his Facebook user, he did not reach the same number of interactions. The official trailer premiered from the Youtube account of HispanoTV and obtained 372 208 views, 5 thousand “likes” and 619 comments, mostly positives ones and a minority were criticizing the cast, the lines and the acting: “This production is a parade of senior citizen figures that no longer represent this country at all. The past stays in the past and does not come back no matter how much you want it to” (@keniaanasco6802, September 2023), “So over-acted, theyre very old for this clowning. I don’t understand why they brought Mimi Lazo [...] she came to take the position away from other actresses who live inVenezuela, takes away the desire to watch it already [...] (@namr2347, September 2023).

Another advertising strategy that worked out to bring communities of audiences was the participation of the cast in private events at the three most important cities in Venezuela: Caracas, Maracaibo and Valencia, where they shared “their impressions of [the] reactivation of the dramatic production in Venezuela, after seven years” (Venezuela news, 2023, para. 2). The events began in Caracas on October 13th with a press conference to officially introduce the series; the next day was the pre-release at the Baralt Theatre in Maracaibo, with the main characters of the series. On Sunday the 15th, they screened the first episode of the series at the Municipal Theatre of Valencia, and they finished on October 16th with a special edition of the magazine program, *Portada's* in Venevision, where they presented the anteroom and the premiere on a free-to-air- channel.

The premiere happened simultaneously with the launching of the website www.mihispano.tv and the app HispanoTV, so that people could enjoy *Dramaticas* from anywhere in the world. The apps TV Latino and Venevision Play, were also options to watch the series, but the audience expressed through Venevision's Instagram that said apps did not work. After the premiere, strong criticism was generated through social media: “don't worry about watching it, it's very BAD, horrible it seems like they're acting students but the worst ones!!! A very poor way to resume the dramas made in Venezuela, they got a 01 on their report card” (@belkibeatrizsarrin, October 31st 2023), “Dramáticas or geriatrias?” (@gusani50, October 31st 2023), “oh nooooo I won't even watch it, didn't meet my expectations and I was so excited for a Venezuelan drama (heartbroken emoji and sad face) with top-notch actors but there's no chemistry” @thamaraaltuve, October 31st 2023). Despite this, from the casts' Instagram accounts; @hispanomedio; @danielferrerc and to a lesser extent @venevision continued the invitation and promotion of the drama.

5. Highlights Of The Year

In August of the year 2023, the Venezuelan streaming platform Venevisión Play was launched in its test phase, owned by Organizacion Cisneros and operated by Cisneros Media. According to Arepa Tecnologica (2023), during the first month of the trial period, it reached 60 thousand downloads. Venevision Play includes access to Novelisima⁶ -created in 2008, as the evolution of Venevision Continental, which, as its name suggests is a *telenovela*-themed channel that broadcasts on a free-to-air channel in the United States and Puerto Rico. Cisneros Media's Novelisima application has also been available since 2022.

⁶ Available at <https://www.novelisima.com/>

We introduce various options to enjoy the great stories that define the most popular genre of latin television. Everyday we present 6 new episodes on our linear channel. Additionally, you can watch every episode we have broadcasted on Novelisima.com and an additional selection of *telenovelas* exclusively available on VOD, that way you can enjoy all the drama and passion when and wherever you wish (Google Play, 2023a).

The 1.0.6 version was released on February 21, 2023 and it has over 50 thousand downloads. On the other hand we have Televen Stream, introduced in September, 2023 in its version 2.11.263.1053, available on iOS, Apple, Samsung, and Roku. It can be downloaded through Play Store, IStore and through a QR code; it has over 100 thousand downloads and it is produced by Mediablocks LLC.

We offer accessible live Venezuelan Television wherever you are. Live sports and daily updates from different television shows. You will be able to enjoy them from the comfort of your Android devices. Customers will only need to install the app to access hundreds of sports and live TV shows from any place. Customers will be able to choose the live channel and hundreds of hours of programs (Google play, 2023b).

Stands out as a significant element, the fact that the main telenovela production channels in the country, Venevision y RCTV have made their content available for free through different streaming platforms, as well as in their own Youtube channels. Such as the case of the profile Venevision Telenovelas (@VenevisionNovelas), created in 2008, it has 960 186 748 views, has posted 6791 videos and has over 1 million subscribers. Whilst in 2021, all of the content that was uploaded on RCTV's Youtube channel was deleted, even though it had more than 1 million subscribers.

In this scenario, the work developed by the fans stands out, since it contributes to the audiovisual memory of serialized fiction in the country, such as the one by the user @familygomezbermudez, that without being certain whether or not she owns the rights of reproduction of fiction, she has three accounts. The first one, @familygomezbermudez7629, was created on January 15th, 2022, it does not have any recognizable location, to date it has 2363 full-length videos uploaded corresponding to national titles, it has over 17 thousand five hundred subscribers and over 11 million views. The second account from this user is @familygomezbermudez7410, it was created on October 6th, 2012, it has posted 1432 videos corresponding to 16 national titles, it has over 15 thousand subscribers, 10 and a half million views and it is located in the United States. The third and last account is @familygomezbermudez9037, it was created on September 21, 2021, it has posted 229 videos corresponding to 4 national titles, it has over 3 thousand subscribers, a million and a half views and it is located in Puerto Rico. To sum things up, this user has gained in her three accounts over 23 million views over the course of 11 years, without being able to locate further information about the account by using OSINT to research. The

abovementioned shows the impact of the service in democratizing the access and, especially, the implications in terms of monetization.

6. Theme Of The Year

Venezuelan audiovisual dramaturgy is in exile. Those who are still in the country have few offers for creation. Hence, those who graduate in careers related to audiovisual dramaturgy explore job opportunities outside the borders. While video conferencing tools such as Zoom or Google Meet are sufficient for writers to reach any executive's desk, they also need to make face-to-face contact, which could provide additional opportunities. Hence, the country's own proposals have been displaced to an eternal waiting room that, with no intention of establishing responsibilities, accounts for a complex context that expelled Venezuela from the serialized fiction market.

There are no business and governmental agreements that would allow them to move forward even though there are human and technical resources in the country that can carry out proposals that meet market requirements. Venezuela is looking for its seat in the market, but to do so, it is essential to stimulate audiovisual fiction dramaturgy. An example of this "crisis" of audiovisual dramaturgy is evidenced by the fact that, in Venezuela, there is still no record since 2019 of any "complex"⁷, audiovisual product, aimed at the audience of 15 to 25 years old and offered from a team of makers between 20 and 35 years old. There are young voices, but they are not shown in the little production that is generated.

In the alternative circuits of audiovisual production, it is noticeable that young people want to create products, but there is no dialogue that combines experiences, will, talent and financing. All this means that playwriting in Venezuela is aging. Despite this reality, there have been some attempts at independent production, without large budgets or commissions from any platform. The little amount of serialized fiction that has been produced in the last six years has characteristics that show its own ways of constructing stories and that are expressed in themes, styles and characters.

Between 2018 and 2023, the following productions were produced: *Eneamiga* (RCTV Producciones, 2018); *Carolay* (BG Creativos, 2019); *La Dama y El vigilante* (TVes, 2019); *Intrigas tras cámaras* (Quimera visión, 2020) untrained; *Almas en pena* (RCTV, 2020); *Carabobo, Caminos de Libertad* (Villa del Cine, 2021); *Vivir y Convivir en Venezuela (Imaginantes Producciones, 2021)*; *Bloque 8* (Lisandro Aguilar, 2021)⁸; *Carabobo, Caminos de Libertad*, 2da temporada (Villa del Cine, 2022), and *Dramáticas (Hispanomedios y Venevisión, 2023)*.

⁷ Complex TV is a term proposed by Jason Mittell that arose from the American cinema of the 1970s and gave way to the deconstruction of the linear narrative structure. The complex narrative model is typical of non-linear structures and works as a puzzle that the viewer assembles because he/she has the ability to reconstruct the discourse in front of him/her.

⁸ No localization of content viewing, beyond the posts published in the RRSS.

In them, there is a tendency to show universes linked to the media theme and how television itself narrates itself. *Eneamiga*, *Intrigas tras cámaras* and *Dramáticas* are in this category. In the three productions there is a critical view that, on the one hand, is literate by explaining terminology, processes and even professional jargon, and on the other, reveals some of the business logics and bad practices that have had negative consequences, such as, for example, unrestrained competition and product espionage.

In this section, the analysis focuses on *Eneamiga* (which was broadcast for the first time in 2023, on AppleTV+ and *HispanoTV* platforms) and *Dramáticas* (premiere on open signal and *HispanoTV*). *Eneamiga* puts the emphasis on the communication phenomenon led by Paula Sanchez, a web star through a site and all the elements that in the current context represent digital media. The conception of the main character stands out, which moves away from traditional views: she is a young, successful woman who marks the lives of other women through the generation of content that functions as an aspirational reference. Beyond the obligatory plot lines, among which the stories of impossible love, betrayals and reunion with the past stand out, we see here an interest in presenting female characters that resemble many Venezuelan women: enterprising, supportive, curious, creative, beyond the low-income young woman whose life will change thanks to her encounter with the young protagonist and his fortune.

This brings us face to face with an evolution in gender dynamics that challenges traditional roles and highlights the transformations on which masculinities and femininities are conceived. Thus, there is a break in relation to the one on whom the important decisions of a company fall: a young woman who has had opportunities, Paula. She, who continues her successful career, thanks to the love alliance with a man who represents the ideal young, beautiful, adventurous and with solid economic resources, opts for the love of Diego Hernandez, her friend from adolescence and who barely survived as a technician in a recording studio. Paula is shown as a vulnerable woman who expresses her emotionality, without any concealment, so that the archetype of Athena is blurred, to show a plausible character.

Other characters who are transgressors against the established models for childhood and motherhood are the girl Lisa Castillo Dávila and her mother, Lucía Dávila. The daughter and wife of Guillermo Castillo, make up a disruptive family model, against what tradition shows. Guillermo, the father, is inscribed in the new masculinities by being the one who manages the household, while Lucía is presented as the “provider” woman who shares responsibilities with him. In addition, she is a woman who chose to resume her university studies as a decision of personal satisfaction, which allows her to detach herself from the role of mother and wife, and she expresses this without any kind of remorse.

On the other hand, the character of Lisa, a girl of approximately 12 years old, rarely smiles, perhaps because she is shown as a child under the autistic spectrum and with limited social skills, however, she is the one who permanently presents critical reflections with her environment and makes them without apparent filters. Along with Guillermo, other characters in *Eneamigas* that stand out for the masculinities they represent are Gianluca Brandini, Paula's husband, who is shown as her supportive partner and invites her to reflect on what it means to be a web star. Likewise, Humberto Delgado, who shows his sexual diversity without implying mockery, pigeonholing, stigmatization or simplification of stereotypes for homosexuality. In this regard, it is important to point out that, although in Venezuelan serialized fiction there is an intention to show respectful views on sex diversity, one of the channels that broadcast *Eneamiga* on open signal was forced to censor one of the love scenes between Humberto and Leonardo, due to the limitations imposed by the *Ley de Responsabilidad Social en Radio, Televisión y Medios Electrónicos*.

In the case of *Dramáticas*, the analysis starts with the review of its constructive elements to define its format and expose the dramatic structure of the story, describe the conceptualization, as well as the aesthetic proposal. In *Dramáticas*, unlike *Eneamiga*, the protagonist is not a person, but a group of actresses, who are sought by a team of producers to save a channel in bankruptcy. The promotional offer shows it as *Dramedy*, which is not a genre, but a format and is as imprecise as the composition of the word. This is what the creators and writers called the series as a marketing strategy, although it is advisable to define it as a "comedy series sort of a *telenovela*". One strategy used to give strength to the proposal was to resort to a constellation of Venezuelan actors and actresses who live inside and outside the country. Most of these actors are over 60 years of age and their inclusion could have been used for recognition, experience and to work on values such as dignity, respect, participation and inclusion, but it remained on the surface.

Announcing the return of telenovelas with a product such as *Dramáticas* was part of the sales packaging used. But, there is no reflection on the part of the production company on what it implies to return to telenovela production in Venezuela, in relation to the high cost of talent and technical equipment. It is important to mention the economic aspect, because budgets have an impact on production, on the construction of scripts and, finally, on the results of the final product. This is because telenovelas are an industrial product that is confused with artistic manifestations. The most important platforms have series in their schedules that they call "sort of *telenovela*", which implies a format that writers must respect according to market research and background evaluation. *Dramáticas* is a story told in 12 continuous episodes that halfway meets the format requirements demanded by the platforms.

In the *Dramáticas*, it is observed that the numerous characters are the protagonists of their own subplots and this, at times, slows down the natural development

of the central story. The main story is saturated with funny sketches but the development of the north of the main characters is uneven because the gag predominates. The chronological narration is what shows us that its structure is linear or classic according to Bordwell.⁹

It is interesting to observe how the characters show glimpses of an inner world as they speak longingly of what they did in the past and, in doing so, try to recall the golden age of the Venezuelan *telenovela*. This is why the conjugation of the narrative elements is more similar to a telenovela written in the 90's than to current proposals, even though *Dramáticas* meets the demand sought by some production houses. One of the weaknesses of *Dramáticas* is that it lacks attractive narrative threads for the target that desires "complex" products. The fact of setting the plot in a country that no longer exists gives it a nostalgic touch that could have been attractive for the audience that longs for the production of Venezuelan fiction serials. However, recalling the classics from a superficial point of view resulted in the public expressing "This does not appeal, right?".¹⁰

Each character has an unfinished story that, in order to advance, is intertwined with other characters in another plot, producing the sensation of the advancement of the total story. But, the main characters are flat and are immersed in bizarre situations, betting on the charisma of the actor rather than the character. The narrative and structural proposal is linear or classic, but it is not an aspect that differs from other series of other production companies in broadcast TV or on demand in Latin America. It is important to recognize that this is a proposal that is well constructed visually, especially in its aesthetic proposal, but it lacked the dramatic element that would engage the audience and give it the necessary support.

⁹ David Jay Bordwell is an American researcher who developed a theory on the narrative structures of American cinema. For more information see: <https://davidbordwell.net/>

¹⁰ Statements of Mrs. Eufrosina, 78 years old, inhabitant of the city of Caracas, in personal interview.

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THIRD PART
TECHNICAL DATA SHEETS FOR THE TOP TEN
TV FICTION IN OBITEL COUNTRIES

TOP TEN TECHNICAL DATA SHEETS

ARGENTINA

1. *Pantanal (remake)*

Production: Globo (Brazil)

Direction: Rogério Gomes, Gustavo Fernandez

Script: Bruno Luperi

Cast: Alanis Guillen, Jesuíta Barbosa, Marcos Palmeira, Dira Paes, José Loreto

Exhibit date (in 2023): 03/29 to 07/28

2. *El Encargado (2nd season)*

Production: Pampa Films 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 2023): 12/03 (only two episodes)

3. *Los Protectores (2nd season)*

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 2023): 06/25 (one-time broadcast)

4. *Café con Aroma de Mujer (remake)*

Production: RCN Televisión (Colombia)

Direction: Mauricio Cruz, Olga Lucía Rodríguez

Script: Javier Giraldo, Paola Cazares, Cecilia Percy

Cast: William Levy, Laura Londoño, Carmen Villalobos, Diego Cadavid, Lincoln Palomeque

Exhibit date (in 2023): 11/27 to 12/29

5. *Diciembre 2001*

Production: Kapow, National Geographic Latinoamérica for Star+ (Argentina)

Direction: Benjamín Ávila

Script: Mario Segade

Cast: Luis Luque, Diego Cremonesi, Nicolás Furtado, Jean Pierre Noher, Luis Machín

Exhibit date (in 2023): 06/11 (one-time broadcast)

6. *Argentina Tierra de Amor y Venganza (2nd season)*

Production: Pol-ka Producciones (Argentina)

Direction: Sebastián Pivotto, Alejandro Ibáñez

Script: Lily Ann Martin, Claudio Lacelli, Vicky Crespo

Cast: Federico D'Elía, Juan Gil Navarro, Justina Bustos, Toni Gelabert, Malena Solda

Exhibit date (in 2023): 04/10 to 09/29

7. *Buenos Chicos*

Production: Pol-ka Producciones (Argentina)

Direction: Gustavo Luppi, Alejandro Ibáñez

Script: Claudio Lacelli, Willy Van Broock, Vicky Crespo

Cast: Jerónimo Bosia, Gina Mastronicola, Tomás Kirzner, Santiago Achaga, Ornella D'Elia

Exhibit date (in 2023): 09/11 to 12/29

8. *Planners*

Production: Pegsa Group for Star+ (Argentina)

Direction: Daniel Barone

Script: Mariana Wainstein, María Zanetti, Luz Márquez

Cast: Celeste Cid, Gonzalo Valenzuela, Leticia Siciliani, Guillermo Pfening, Matías Recalt

Exhibit date (in 2023):

05/14 (one-time broadcast)

9. *Mi Fortuna es Amarte*

Production: Televisa Univision (Mexico/USA Hispanic)

Direction: Isaías Gómez, Alejandro Gamboa

Script: Alejandra Díaz, José Rubén Núñez, María del Pilar Pedroza

Cast: Susana González, David Zepeda, Chantal Andere, Sergio Sendel, Lisset

Exhibit date (in 2023): 01/09 to 01/13 (cancelled due to low ratings)

10. *Familia de Diván*

Production: Tronito Productora,
GM Comunicación for Flow (Argentina)

Direction: Alejandro Ciancio

Script: Ariana Saiegh, Cecilia Guerty, Federico Levin, Maximiliano Monzón, Laura Seijo

Cast: Carola Reyna, Boy Olmi, Inés Efron, Teo D'Elía, Nora Cárpena

Exhibit date (in 2023): 12/29 (one-time broadcast in 2023)

TOP TEN TECHNICAL DATA SHEETS
BRAZIL

1. *Terra e Paixão*

Production: Globo

Direction: João Paulo Jabur and Luiz Henrique Rios

Script: Walcyr Carrasco

Cast: Barbara Reis, Cauã Reymond, Johnny Massaro, Paulo Lessa, Tony Ramos, Glória Pires, Susana Vieira, Débora Falabella and Tatá Werneck

Exhibition date (in 2023): May 5th to December 31st

2. *Travessia*

Production: Globo

Direction: André Barros, Mauro Mendonça Filho, Walter Carvalho, Mariana Richard, Caio Campos, Isabella Gabaglia, Philippe Barcinski, Caetano Caruso and Britney Federline

Script: Glória Perez

Cast: Lucy Alves, Chay Suede, Rômulo Estrela, Jade Picon, Giovanna Antonelli and Alexandre Nero

Exhibition date (in 2023): January 1rd to May 5th

3. *Vai na Fé*

Production: Globo

Direction: Cristiano Marques and Paulo Silvestrini

Script: Rosane Svartman

Cast: Sheron Menezes, José Loreto, Renata Sorrah, Emilio Dantas, Regiane Alves, Samuel De Assis, Mel Maia, Carolina Dieckmann, Claudia Ohana and Marcos Veras

Exhibition date (in 2023): January 16rd to August 11th

4. *Cara e Coragem*

Production: Globo

Direction: Adriano Melo e Natália Grimberg

Script: Claudia Souto

Cast: Paolla Oliveira, Marcelo Serrado, Taís Araújo, Paulo Lessa, Ícaro Silva, Mel Lisboa, Ricardo Pereira e André Luiz Frambach

Exhibition date (in 2023): January 1rd to January 13th

5. *Amor Perfeito*

Production: Globo

Direction: André Câmara

Script: Elísio Lopes Jr.

Cast: Camila Queiroz, Diogo Almeida, Mariana Ximenes, Zezé Polessa, Paulo Betti, Paulo Gorgulho, Tonico Pereira, Thiago Lacerda and Carmo Dalla Vecchia

Exhibition date (in 2023): March 20th to September 22th

6. *Mar do Sertão*

Production: Globo

Direction: Allan Fiterman

Script: Mario Teixeira

Cast: Isadora Cruz, Sérgio Guizé, Renato Góes, Eli Ferreira, Giovana Cordeiro, Débora Bloch, José de Abreu, Caio Blat and Enrique Díaz

Exhibition date (in 2023): January 1rd to March 17th

7. *Fuzuê*

Production: Globo

Direction: Fabrício Mamberti, Adriano Melo, Bernardo Sá, Nathalia Ribas e Glenda Nicácio and Cadu França

Script: Gustavo Reiz

Cast: Marina Ruy Barbosa, Giovana Cordeiro, Nicolas Prattes, Felipe Simas, Olivia Araujo, Juliano Cazarré, Clayton Nascimento, Lilia Cabral and Edson Celulari

Exhibition date (in 2023): August 14rd to December 31th

8. *O Rei do Gado*

Production: Globo

Direction: Luiz Fernando Carvalho

Script: Benedito Ruy Barbosa

Cast: Antônio Fagundes, Patricia Pillar, Raul Cortez, Glória Pires, Fábio Assunção, Silvia Pfeifer, Carlos Vereza and Stênio Garcia

Exhibition date (in 2023): January 1rd to June 2th

9. *Rensga Hits!*

Production: Globo

Direction: Leandro Neri and Carol Durão

Script: Renata Corrêa, Bia Crespo, Nathalia Cruz, Victor Rodrigues e Otavio Chamorro

Cast: Alice Wegmann, Lorena Comparato, Deborah Secco, Fabiana Karla, Maurício Destri, Mouhamed Harfouch, Alejandro Claveaux, Samuel De Assis, Jeniffer Dias,

Sidney Santiago, Maíra Azevedo, Lúcia Veríssimo, Ernani Moraes and Rafa Kalimann

Exhibition date (in 2023): August 21st to September 1st

10. *Histórias Quase Verdadeiras*

Production: Globo

Direction: José Eduardo Belmonte

Script: João Falcão, Célio Porto and Tatiana Maciel

Cast: Renato Góes, Jackson Antunes, Luis Miranda, Giulia Gam, Zezé Polessa, Nanda Costa and Leandro Hassum

Exhibition date (in 2023): January 2nd to January 6th

TOP TEN TECHNICAL DATA SHEETS

CHILE

1. *La Ley de Baltazar*

Production: Mega/Chilefilms (Chile)

Direction: Nicolás Alemparte Bickell

Script: Daniella Castagno, Rodrigo Bastidas

Cast: Francisco Reyes, Amparo Noguera, Gabriel Cañas, Daniela Ramírez, Simón Pešutić, Francisca Imboden

Exhibition dates (in 2023): 02/01 to 10/05

2. *Como la Vida Misma*

Production: Mega/Mazal (Chile)

Direction: Felipe Arratia Díaz

Script: Marcelo Castañón, Valentina Pollarolo, Sergio Díaz, Hermann Heim

Cast: Sigrid Alegría, Diego Muñoz, Andrés Velasco, Íngrid Cruz, Elisa Zulueta

Exhibition dates (in 2023): 09/05 to 29/12

3. *Generación 98*

Production: Mega/Chilefilms (Chile)

Direction: Nicolás Alemparte Bickell

Script: Mauricio López Fernández, Paula Andrea Parra Bruna, María Fernanda Lema Gac

Cast: Gabriel Cañas, María Gracia Omegna, Daniela Ramírez, Nicolás Oyarzún, Paloma Moreno.

Exhibition dates (in 2023): 05/06 to 28/12 (ended in April 2024)

4. *Hijos del Desierto*

Production: Mega/Mazal (Chile)

Direction: Patricio González Kuhlmann

Script: Patricio Heim, Simón Soto

Cast: Gastón Salgado, Jorge Arecheta, María José Weigel, Francisco Melo, Paola Volpato

Exhibition dates (in 2023): 02/01 to 05/06

5. *Juego de Ilusiones*

Production: Mega/Mazal (Chile)

Direction: Matías Stagnaro

Script: Verónica Saquel, Carlos Oporto, Marianela Fuenzalida, Fernando Delgado
Cast: Carolina Arregui, Julio Milostich, Alejandra Fosalba, Loreto Valenzuela, Patricio Achurra, Magdalena Müller
Exhibition dates (in 2023): 16/01 to 29/12

6. *Gloria Trevi: Ellas Soy Yo*

Production: TelevisaUnivision

Direction: Carla Estrada

Script: Eric Vonn, Lele Portas, Marco Tulio Socorro, Carla Estrada, Juan Carlos Cuellar, Enrique Flores, Luis Gerardo del Razo

Cast: Scarlet Gruber, Jorge Poza, Patsy, Norma Herrera, Gloria Mayo, Eduardo Capetillo

Exhibition dates (in 2023): 25/12 to 28/12

7. *Alma Negra*

Production: TVN/Ladrón de Bicicletas (Chile)

Direction: Marcelo Bernous

Script: Carlos Pinto

Cast: Ana Luz Figueroa, Nelson Brodt, Bárbara Mundt, Rocío Toscano, Víctor Montero

Exhibition dates (in 2023): 09/03 to 04/05

8. *Cecilia la Incomparable*

Production: Hugo Miller Producciones (Chile)

Direction: Vanessa Miller

Script: Vanessa Miller, Axel Nacher, Carmen Gloria López, Claudia Adriaola y Fernando Schmidt.

Cast: Amaya Forch, Daniela Benítez, Erto Pantoja, Jaime Omeñaca, Josefina Montané, Alejandra Araya, Nathalia Aragonese.

Exhibition dates (in 2023): 05/10 to 12/10

9. *Huérfanos de su Tierra*

Production: Rede Globo (Brasil)

Direction: André Câmara

Script: Aimar Labaki, Carolina Ziskind Cristina Biscaia, Dora Castellar

Cast: Julia Dalavia, Renato Góes, Alice Wegmann, Carmo Dalla Vecchia, Anajú Dorigon, Rodrigo Simas

Exhibition dates (in 2023): 02/01 to 05/03

10. *Los Mil Días de Allende*

Production: Parox (Chile), Aleph (Argentina), El Corredor Mediterráneo (España), HD Argentina, Mente Colectiva (Chile)

Direction: Nicolás Acuña

Script: Carla Stagno, Cristián Jiménez, Paco Mateo, Pablo Manzi

Cast: Alfredo Castro, Pablo Capuz, Benjamín Vicuña, Daniel Alcaíno, Tito Bustamante, Aline Kuppenheim

Exhibition dates (in 2023): 07/09 to 28/09

TOP TEN TECHNICAL DATA SHEETS COLOMBIA

1. *Ana de Nadie*

Production: RCN (Colombia)

Dirección: Olga Lucía Rodríguez, Luis Carlos Sierra.

Script: Gilma Peña, Jimena Romero

Cast: Paola Turbay, Sebastián Carvajal, Jorge Enrique Abello

Exhibition Date (in 2023): 01/03 a 25/07

2. *Pasión de Gavilanes. La Dinastía Indomable*

Production: Telemundo (USA) CMO (Colombia)

Dirección: Mauricio Cruz, Rodrigo Triana, Camilo Vega

Script: Iván Martínez Lozano, Carlos Fernández de Soto

Cast: Mario Cimarro, Danna García, Paola Rey, Bernardo Flores, Sebastián Osorio

Exhibition Date (in 2023): 13/09 a 15/12

3. *Rigo*

Production: RCN (Colombia)

Dirección: Catalina Hernández, Juan Carlos Mazo

Script: César Betancur, Sandra Motato

Cast: Juan Pablo Urrego, Ana María Estupiñán, Ramiro Meneses

Exhibition Date (in 2023): 9/10 a 15/12

4. *Romina Poderosa*

Production: Caracol (Colombia)

Dirección: Rafael Acuña, Rafael Martínez Moreno, Herney Luna

Script: Rafael Acuña

Cast: Juanita Molina, David Palacio, Zharick León

Exhibition Date (in 2023): 31/05 a 11/09

5. *Leandro Díaz*

Production: RCN (Colombia)

Dirección: Juan Carlos Mazo, Víctor Cantillo

Script: Juan Sebastián Granados, Rafael Noguera, Cecilia Percy

Cast: Silvestre Dangond, Laura de León

Exhibition Date (in 2023): 10/01 a 28/02

6. *Tía Alison*

Production: RCN (Colombia)

Dirección: Víctor Cantillo, Israel Sánchez

Script: Héctor Alejandro Moncada

Cast: Juliette Pardau, Rodrigo Candamill, Manuela González

Exhibition Date (in 2023): 26/07 a 31/10

7. *Ventino. El Precio de la Gloria*

Production: Caracol (Colombia)

Dirección: Rodolfo Hoyos, Jorge Navas

Script: Adriana Barreto, Jhonny A. Ortiz, Karen Rodríguez, Gustavo Salcedo

Cast: Carolina Gómez, Natalia Afanador, María Cristina de Angulo, Camila Es-
guerra, Olga Lucía Vives

Exhibition Date (in 2023): 1/03 a 30/05

8. *Cabo*

Production: Televisa (México)

Dirección: Salvador Garcini, Fez Noriega

Script: Carlos Daniel González, Fernando Garcilita, Fabiola López Neri, Claudia
Manzano

Cast: Bárbara de Regil, Matías Novoa, Eva Cedeño

Exhibition Date (in 2023): 05/06 a 03/10

9. *Los Medallistas*

Production: Caracol (Colombia)

Dirección: Luis Orjuela, Juan Carlos Vásquez, Mónica Cifuentes

Script: César Betancur, Mayra

Henao, Yanira Sánchez

Cast: José Ramón Barreto, Paola Valencia, Mayra Luna, Víctor Hugo Trespacios

Exhibition Date (in 2023): 8/02 a 15/05

10. *El Amor Invencible*

Production: Televisa (México)

Dirección: Bonnie Cartas, Eric Morales

Script: Pablo Ferrer, Lilian Gatica, Santiago Pineda, Pablo Ferrer García - Travesi

Cast: Angelique Boyer, Danilo Carrera, Daniel Elbittar

Exhibition Date (in 2023): 04/10 a 15/12

TOP TEN TECHNICAL DATA SHEETS
MÉXICO

1. *La Rosa de Guadalupe*

Production: Televisa

Direction: Ricardo de la Parra; Lorena Maza

Script: Carlos Mercado Orduña

Cast: varios actores del CEA (Escuela de Actuación de Televisa)

Exhibition date (in 2023): 01/01 to 31/12 from Monday to Friday.

2. *Tierra de Esperanza*

Production: TelevisaUnivision

Direction: Carlos Cock Marín; Rubén Nelhiño

Script: Alejandro Pohlenz, María Chávez, Fabiola López Neri, Claudia Manzano.

Cast: Carolina Miranda, Andrés Palacios, Luis Roberto Guzmán.

Exhibition date (in 2023): 12/06 to 01/09 from Monday to Friday.

3. *Perdona nuestros pecados*

Production: TelevisaUnivision

Direction: Sergio Barbosa, Jorge Robles.

Script: Carmen Sepúlveda, Luis Alberto Reynoso

Cast: Jorge Salinas, Érika Buenfil, César Évora, Sabine Moussier, Marisol del Olmo.

Exhibition date (in 2023): 30/01 to 02/06 from Monday to Friday.

4. *Pienso en ti*

Production: TelevisaUnivision

Direction: Luis Manzo, Carlos Santos, Orlando Rosales.

Script: Edwin Valencia, Janely Lee, Isabel de Sara, Ana Granados.

Cast: Dulce María, David Zepeda, Alexis Ayala, Brandon Peniche.

Exhibition date (in 2023): 13/03 to 23/06 from Monday to Friday.

5. *Eternamente Amándonos*

Production: TelevisaUnivision

Direction: Silvia Tort, Rodrigo Cachero.

Script: Elizabeth Ávila

Cast: Diana Bracho, Alejandra Robles Gil, Marcus Ornellas

Exhibition date (in 2023): 27/02 to 11/08 from Monday to Friday.

6. *Como dice el Dicho*

Production: Televisa

Direction: Emmanuel Duprez.

Script: José Antonio Olvera.

Cast: Sergio Corona, Brisa Carrillo, Benny Emmanuel y Fernanda Sasse.

Exhibition date (in 2023): 01/01 to 31/12 from Monday to Friday.

7. *Vencer la Culpa*

Production: TelevisaUnivision

Direction: Benjamín Cann; Fernando Nesme.

Script: Alejandra Romero Meza, Humberto Robles, Luis Fernández de Gamboa, Daniela Ochoa, Cecilia Oviedo, Claudia Caro Cabello, Marisela Rodríguez.

Cast: Claudia Martin, Gabriela de la Garza, Gabriel Soto, Matías Novoa, María Sor-té, Carlos Ferro.

Exhibition date (in 2023): 26/06 to 13/10. From Monday to Friday.

8. *Golpe de Suerte*

Production: TelevisaUnivision

Direction: Alejandro Gamboa, Isaías Gómez May

Script: Alberto Díaz

Cast: Mayrín Villanueva, Eduardo Yáñez, Sergio Sendel, Eva Sedeño, Marjorie de Sousa.

Exhibition date (in 2023): 16/10 to 18/02/24. From Monday to Friday.

9. *Minas de Pasión*

Production: TelevisaUnivision

Direction: Juan Carlos Muñoz, Jorge Robles, Manolo Fernández.

Script: Edwin Valencia, María Elena López, Romy Díaz, Rubén Gallardo.

Cast: Livia Brito, Osvaldo de León, Anette Michel, Alejandro Camacho.

Exhibition date (in 2023): 21/08 to 14/01. From Monday to Friday.

10. *Gloria Trevi: Ellas soy yo*

Production: TelevisaUnivision

Direction: Carla Estrada

Script: Juan Carlos Cuéllar, Enrique Flores, Luis Gerardo del Razon.

Cast: Scarlet Gruber, Gloria Trevi, Jorge Poza, Patsy, Norma Herrera, Gloria Mayo.

Exhibition date (in 2023): 11/08 to 13/10. From Monday to Friday.

**TOP TEN TECHNICAL SHEETS
PORTUGAL**

1. *Festa é Festa V*

Production: Plural Entertainment(Portugal)

Showrunner: Ana Antunes

Script: Roberto Pereira

Cast: Maria do Céu Guerra, Pedro Teixeira, Ana Guiomar, Pedro Alves, Beatriz Barosa

Broadcast date (in 2022) 1/1 to 7/1

2. *Marco Paulo: a história da minha vida*

Production: Coral Europa Portugal

Showrunner: Cláudia Lopes Costa

Script: Vera Sacramento, Susana Tavares, Sara Rodi

Cast: Diogo Martins, Fernando Luís, Rita Blanco,

Broadcast date (in 2023): 1/1

3. *Sangue Oculto*

Production: SP Televisão(Portugal)

Showrunner: Jorge Cardoso

Script: Sandra Santos

Cast: Sara Matos, Sofia Alves, Luana Piovani, João Catararé, António Pedro Cerdeira

Broadcast date (in 2023): 1/1 to 13/10

4. *Quero é Viver*

Production: Plural Entertainment(Portugal)

Showrunner: Hugo de Sousa, Manuel Amaro da Costa

Script: Helena Amaral

Cast: São José Lapa, Rita Pereira, Fernanda Serrano, Sara Barradas, Joana Seixas

Broadcast date (in 2023): 01/1 to 18/03

5. *Morangos com Açúcar*

Production: Plural Entertainment(Portugal)

Showrunner: Francisco Antunez

Script: Maria João Mira, André Ramalho

Cast: Rita Pereira, Tiago Castro, Pedro Teixeira, Madalena Aragão, Margarida Corceiro

Broadcast date (in 2023): 23/1 to 24/12

6. *Queridos Papás*

Production: Plural Entertainment

Showrunner: Manuel Amaro da Costa

Script: Maria João Mira

Cast: José Fidalgo, Tiago Teotónio Pereira, Fernando Pires, Pedro Sousa, Sara Prata, Madalena Brandão

Broadcast date (in 2023): 13/1 to 31/12

7. *Flor sem Tempo*

Production: SP Televisão(Portugal)

Showrunner: Jorge Queiroga

Script: Inês Gomes, Cândida Ribeiro, Rita Roberto, Ana Casaca, Ana Vasques, José Pinto Carneiro, Manuel Carneiro

Cast: Bárbara Branco, Francisco Froes, Albano Jerónimo, Maria João Bastos, Joana Santos

Broadcast date (in 2023): 30/1 to 31/12

8. *Papel Principal*

Production: SP Televisão

Showrunner: Francisco Barbosa

Script: Ana Casaca

Cast: Carolina Carvalho, Margarida Vila-Nova, Ângelo Rodrigues, José Mata, Maflada Vilhena

Broadcast date (in 2023): 25/1 to 31/12

9. *Curral de Moinas: Os Banqueiros do Povo*

Production: Filbox

Showrunner: Miguel Cadilhe

Script: Frederico Pombares, Henrique Dias

Cast: João Paulo Rodrigues, Pedro Alves, Júlia Pinheiro, Rui Unas, Sofia Ribeiro

Broadcast date (in 2023): 21/1 to 02/09

10. *A Casa da Aurora*

Production: SP Televisão

Showrunner: Jorge Cardoso

Script: David Búzio

Cast: Carolina Carvalho, Renato Godinho, Noémia Costa, Melânia Gomes, Diogo Martins

Broadcast date (in 2023): 30/1 to 30/11

TOP TEN TECHNICAL DATA SHEETS

SPAIN

1. *Cuéntame cómo pasó*

Production: Grupo Ganga Producciones, RTVE (Spain)

Direction: Óscar Aibar, Agustín Crespi, Antonio Cano, Joaquín Oristell

Script: Jacobo Delgado, Sonia Sánchez, Manu Dios, Ignacio del Moral, Curro Royo, Joaquín Oristell

Cast: Imanol Arias, Ana Duato, María Galiana, Pablo Rivero, Irene Visedo, Carmen Climent, Carlos Hipólito, Paloma Bloyd

Exhibition date (in 2023): 10/18 to 11/29

2. *Laura y sus misterios*

Production: Veranda TV, RTVE (Spain)

Direction: Pau Freixas, Inma Torrente, Juancho Calvo, Miguel Bardem

Script: Javier Holgado, Carlos Vila

Cast: María Pujalte, Fernando Guillén Cuervo, Oriol Tarrasón, César Camino, Laura Pamplona, Raúl del Pozo, Juan del Pozo, Beatriz Carvajal

Exhibition date (in 2023): 12/13 to 12/21

3. *Amar es para siempre*

Production: Diagono TV (Spain)

Direction: Eduardo Casanova

Script: Ángel Agudo, Bárbara Alpuente, Julia Altares, Tirso Cond

Cast: Itziar Miranda, Manuel Baqueiro, José Antonio Sayagués, Miriam Díaz-Aroca, Roberto Álvarez, Aída Folch, Norma Ruiz, Paula Gallego

Exhibition date (in 2023): 01/02 to 12/29

4. *4 estrellas*

Production: RTVE, Good Mood (Spain)

Direction: Manu Gómez, Álvaro Vicario, Laura Campos, Luis Arribas, Juan Gil

Script: Daniel Écija, Ángel Turlán, Javier Lorenzo, Borja González Santaolalla

Cast: Toni Acosta, Ana Gracia, Martya Aledo, Dafne Fernández, David Lorente, Antonio Molero, Ana Jara, Martí Coertero

Exhibition date (in 2023): 06/13 to 12/27

5. *La promesa*

Production: StudioCanal, Bambú Producciones, RTVE (Spain)

Direction: Miguel Conde, Javier Pulido, Eva Bermúdez, Alberto Pernet
Script: Susana Prieto, Ruth García, Carmen Llano
Cast: Ana Garcés, Eva Martín, Arturo Sancho, Joaquín Climent, María Castro, Antonio Velázquez, Andrea del Río, Manuel Regueiro
Exhibition date (in 2023): 01/12 to 12/29

6. *La que se avecina*

Production: Contubernio Films (Spain)
Direction: Alberto Caballero, Laura Caballero, Miguel Abaladejo
Script: Alberto Caballero, Laura Caballero, Daniel Deorador
Cast: Fernando Tejero, Jordi Sánchez, Nathalie Seseña, Eva Isanta, Carlos Areces, Pablo Chiapella, Luis Merlo, Nacho Guerreros
Exhibition date (in 2023): 11/08

7. *La caza. Guadiana*

Production: DLO Producciones y RTVE (Spain)
Direction: Salvador García Ruiz, Rafa Montesinos, David Ulloa, Mar Olid, Javier Pulido
Script: Miguel Saez, Jorge Díaz, Antonio Santos Mercero, Agustín Martínez
Cast: Megan Montaner, Alain Hernández, Félix Gómez, Beatriz Carvajal, Francis Lorenzo, Bea Segura, Pablo Derqui, Patxi Freytez
Exhibition date (in 2023): 03/16 to 04/20

8. *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, Laura Ramos, Manuel Tallafé, Manolo Caro, Itziar Atienza
Exhibition date (in 2023): 10/10 to 11/28

9. *Escándalo, relato de una obsesión*

Production: Alea Media, Mediaset (Spain)
Direction: Aurora Guerra
Script: Aurora Guerra, Aitor Gabilondo
Cast: Alexandra Jiménez, Fernando Lindez, Eve Ryan, Antonio Gil, Carlos Serrano, Alba Gutiérrez, Celia Freijeiro, Raúl Peña
Exhibition date (in 2023): 01/11 to 03/01

10. *Los pacientes del Dr. García*

Production: Diagonal, DeAPlaneta, RTVE (Spain)

Direction: Joan Noguera

Script: José Luis Martín

Cast: Javier Rey, Tamar Novas, Verónica Echegui, Raúl Jiménez, Carmen Molinar, Iñaki Miramón, Javier Abad, Pepa Pedroche

Exhibition date (in 2023): 04/19 to 04/28

TOP TEN TECHNICAL DATA SHEETS
UNITED STATES

1. *Tierra de Esperanza*

Production: TelevisaUnivision (Mexico)

Director: Carlos Cock Marín, Rubén Nelhiño Acosta

Screenplay: Alejandro Pohlenz, María Chávez, Fabiola López Neri, Claudia Manzano

Cast: Carolina Miranda, Andrés Palacios, Luis Roberto Guzmán, Mariana Seoane

Exhibition dates (in 2023): (08/01 to 10/30)

2. *Mi Camino es Amarte*

Production: TelevisaUnivision (Mexico)

Direction: Isaías Gómez, Alejandro Gamboa

Screenplay: Juan Carlos Alcalá, Rosa Salazar Arenas, Julián Aguilar, Rubén Núñez

Cast: Susana González, Gabriel Soto, Alan Tacher, Ximena Herrera

Exhibition dates (in 2023): (01/02 to 03/30)

3. *Amor Invencible*

Production: TelevisaUnivision (Mexico)

Direction: Eric Morales, Bonnie Cartas, Carlos Alcázar

Screenplay: Pablo Ferrer, Lilian Gatica, Inés Gómez, Martha Jurado, Vasco Monteiro, Hugo Moreno, Santiago Pineda, Marisela Rodríguez, Juan Osorio

Cast: Angelique Boyer, Danilo Carrera, Leticia Calderón, Daniel Elbittar, Marlene Favela

Exhibition dates (in 2023): (04/03 to 07/31)

4. *Cabo*

Production: TelevisaUnivision (Mexico)

Direction: Salvador Garcini, Fez Noriega

Screenplay: Carlos Daniel González, Fernanda Garcilita, Fabiola López Neri, Claudia Manzano

Cast: Barbara del Regil, Matías Novoa, Eva Cedeño, Diego Amozurrutia

Exhibition dates (in 2023): (01/09 to 05/12)

5. *Perdona Nuestros Pecados*

Production: TelevisaUnivision (Mexico)

Direction: Santiago Barbosa, Jorge Robles

Screenplay: Carmen Sepúlveda, Luis Alberto Reynoso
Cast: Jorge Salinas, Erika Buenfil, Cesar Évora, Sabine Moussier, Marisol del Olmo, Emmanuel Palomares, Oka Giner
Exhibition dates (in 2023): (02/21 to 07/06)

6. *Vencer la Ausencia*

Production: TelevisaUnivision, Studios W (Mexico – U.S.)
Direction: Fernando Mesme, Benjamín Cann
Screenplay: Alejandra Morena, Humberto Robles, Luis Gamboa, Daniela Ochoa
Cast: Ariadne Diaz, Maryrin Villanueva, David Zepeda, Danilo Carrera, Alejandro Barros, Alexis Ayala, Jesús Ochoa, Mariana Garza
Exhibition dates (in 2023): (01/02 to 02/17)

7. *La Madrastra*

Production: TelevisaUnivision (Mexico)
Direction: Sergio Cataño, Héctor Márquez
Screenplay: Rosa Salazar Arenas, Ricardo Tejeda, Fermín Zúñiga, Anthony Martínez, Juan Carlos Tejeda
Cast: Araceli Arámbula, Andrés Palacios, Marisol del Olmo, Juan Carlos Barreto
Exhibition dates (in 2023): (01/02 to 01/05)

8. *Minas de Pasión*

Production: TelevisaUnivision (Mexico)
Direction: Jorge Robles, Manolo Fernández, Juan Carlos Muñoz
Screenplay: Bethel Flores, Edwin Valencia, María Elena López, Romy Diaz
Cast: Livia Brito, Osvaldo de León, Anette Michel, Alejandro Camacho, Cynthia Klitbo
Exhibition dates (in 2023): (08/31 to 12/28)

9. *Eternamente Amándonos*

Production: TelevisaUnivision (México)
Direction: Silvia Tort, Rodrigo Cachero
Screenplay: Rosana Curiel, Cecilia Piñeiro, Juan Carlos Baltazar
Cast: Diana Bracho, Marcus Ornelas, Alejandra Robles Gil, Ana Bertha Espin
Exhibition dates (in 2023): (07/10 to 11/09)

10. *El Señor de los Cielos 8*

Production: Telemundo (U.S.)
Direction: Juan Carlos Valdivia, Conrado Martínez, Mauricio Meneses, Bernardo Mota

Screenplay: Luis Zelkowicz, Juan Manuel Andrade, Iris Dubs, Carmina Narro
Cast: Rafael Amaya, Rubén Cortada, Carmen Aub, Iván Arana, África Zavala, Isabella Castillo, Yuri Vargas, Alejandro López
Exhibition dates (in 2023): (01/17 to 05/22)

TOP TEN TECHNICAL DATA SHEETS
URUGUAY

1. *Pantanal*

Production: TV Globo (Brazil)

Direction: Rogério Gomes and Gustavo Fernandez

Script: Bruno Luperi

Cast: Alanis Guillen, Jesuíta Barbosa, Marcos Palmeira, Dira Paes, José Loreto, Irandhir Santos, Osmar Prado and Karine Teles

Exhibition date (in 2023): 04/17 to 10/17

2. *Travesía*

Production: TV Globo (Brazil)

Direction: Mauro Mendonça Filho

Script: Gloria Perez

Cast: Lucy Alves, Rômulo Estrela, Chay Suede

Exhibition date (in 2023): 06/05 to 10/09

3. *Solo Confia*

Production: TV Globo (Brazil)

Direction: Paulo Silvestrini and Cristiano Marques

Script: Rosane Svartman, Mário Viana, Renata Corrêa, Pedro Alvarenga, Renata Sofia, Fabrício Santiago, Sabrina Rosa

Cast: Sheron Menezes, Carolina Dieckmann, Emilio Dantas, Samuel de As

Exhibition date (in 2023): 10/10 to 12/29

4. *Café Con Aroma De Mujer*

Production: RCN Televisión (Colombia)

Direction: Mauricio Cruz and Olga Lucia Rodríguez

Script: Javier Giraldo, Paola Cazares, Cecilia Percy

Cast: Laura Londoño, William Levy, Carmen Villalobos, Diego Cadavid, Mabel Moreno

Exhibition date (in 2023): 04/25 to 09/04

5. *Solo Se Vive Dos Veces*

Production: TV Globo (Brazil)

Direction: Pedro Brenelli and Allan Fiterman

Script: Mauro Wilson, Marcelo Gonçalves, Mariana Torres, Rodrigo Salomão

Cast: Giovanna Antonelli, Vladimir Brichta, Mateus Solano and Valentina Herszage
Exhibition date (in 2023): 01/02 to 04/07

6. *Temporario*

Production: Teatro El Galpón and La Vorágine Films (Uruguay)

Direction: Guillermo Casanova.

Script: Gabriel Calderón, Laura and Rodolfo Santullo, Carlos Morelli, Marcos Acuña and Federico Borgia

Cast: Myriam Gleijer, Luis Fourcade, Pablo Pipolo, Soledad Frugone, Marcos Flack, Silvia García, Vladimir Bondiuk Petruk, Nadina González Miranda, Héctor Hernández, Lucil Cáceres, Pablo Robles, Marcos Zarzaj, Giuliano Rabino, Carolina Pereira, Daniel Cardozo, Dante Alfonso, Felisa Jezier, Anaclara Alexandrino, Gianna Prenol, Lucía Rosini

Exhibition date (in 2023): 05/19 to 07/07

7. *La Madrastra*

Production: TelevisaUnivision (Mexico)

Direction: Sergio Cataño, Héctor Márquez, Héctor Campos

Script: Liliana Abud, Julián Aguilar, Mauricio Aridjis, Arturo Moya Grau, Gabriela Ortigoza, Rosa Salazar Arenas, Ricardo Tejeda, Fermín Zúñiga.

Cast: Aracely Arámbula, Andrés Palacios, Marisol del Olmo

Exhibition date (in 2023): 01/30 to 04/07

8. *Los Ricos También Lloran*

Production: TelevisaUnivision (Mexico)

Direction: Luis Manzo, Pavel Vázquez, Carlos Santos

Script: Marisel Lloberas, Fermín Zúñiga, Daniela Richer

Cast: Sebastián Rulli, Claudia Martín, Fabiola Guajardo, Azela Robinson, Alejandra Barros, Víctor González, Guillermo García Cantú

Exhibition date (in 2023): 01/02 to 01/27

9. *La Ley De Baltazar*

Production: Chilefilms (Chile)

Direction: Nicolás Alemparte Bickell

Script: Milena Bastidas, Daniella Castagno, Elena Muñoz

Cast: Francisco Reyes, Amparo Noguera

Exhibition date (in 2023): 06/26 to 12/29

10. *Más Que Una Ilusión*

Production: TV Globo (Brazil)

Direction: Luís Felipe Sá and Luiz Henrique Rios

Script: Alessandra Poggi, Adriana Chevalier, Letícia Mey, Flávio Marinho, Rita Lemgruber

Cast: Larissa Manoela, Rafael Vitti, Danilo Mesquita, Jayme Matarazzo, Débora Ozório, Malu Galli, Antonio Calloni, Bárbara Paz.

Exhibition date (in 2023): 07/07 to 04/24

TOP FIVE TECHNICAL DATA SHEETS
VENEZUELA

1. *Querer sin Límites*

Production: TV Globo (Brasil)

Direction: Rogério Gomes

Script: Glória Perez

Cast: Juliana Paes, Ísis Valverde, Paola Oliveira, Carol Duarte, Marco Pigossi, Fiuk, Rodrigo Lombardi

Exhibition date (in 2023): 06/30-11/08

2. *La Rosa de Guadalupe*

Production: Televisa Univisión (México)

Direction: Marta Luna

Script: Carlos Mercado Orduña

Cast: Varios

Exhibition date (in 2023): 01/02-12/29

3. *Mi Secreto*

Production: Televisa (México)

Direction: Luis Eduardo Reyes, Rubén Nelhiño Acosta

Script: Erick Arroyo

Cast: Macarena García, Diego Klein, Isidora Vives, Andrés Baida.

Exhibition date (in 2023): 04/06-08/21

4. *Papá a Toda Madre*

Production: Televisa (México)

Direction: Benjamín Cann, Rodrigo G. H. Zaunbos

Script: Héctor Valdés, Luis Gamboa, Juan Carlos Tejeda, Alejandra Díaz Barros, Claudia Caro Cabello, Valentín Fernández, Rodrigo Hernández

Cast: Sebastián Rulli, Maite Perroni, Juan Carlos Barreto, Sergio Mur, Raúl Araiza, Regina Graniewicz, Mark Tacher, Ana La Salvia

Exhibition date (in 2023): 12/05/2022-05/05

5. *Imperio*

Production: Rede Globo (Brasil)

Direction: Rogério Gomes

Script: Aguinaldo Silva

Cast: Alexandre Nero, Lília Cabral, Leandra Leal, Drica Moraes, Marjorie Estiano

Exhibition date (in 2023): 07/12/2022-04/16

OBITEL 2024

The new options offered by the digital ecosystem, in the production, distribution, and exhibition of television fiction, have triggered new modalities of access and consumption of television fiction. Thus, the successful emergence of SVOD systems is having a significant impact on television fiction formats and their narrative strategies, which can be seen both on open television, on cable television or on the offer of these digital platforms themselves. Seriality has been a central component of television logic since its origins and, in an increasingly competitive television ecology, this dimension is challenged.

The Obitel 2024 Yearbook has focused attention on the particularities that Ibero-American narrative is proposing today in order to provide an analysis of its themes, narrative resources and characters. Based on some conceptual guidelines and common observation criteria, each country has studied the subject in its particular context.

The unified protocol is maintained and focuses on monitoring serial fiction broadcast mainly on open television. However, the technological changes and advances of recent years, with regard to new forms of distribution, have meant that fiction shown on VoD has been integrated into the monitoring, as well as a succinct follow-up of pay television channels and the behaviour of audiences in digital environments. With this, the field of action is expanded each year without losing sight of the main objective: the observation of some variables in the process of production, circulation and consumption of serial fiction content in Ibero-America.

