

COMPARATIVE CHAPTER: THE UNSTOPPABLE RISE OF STREAMING

DOI: <https://doi.org/10.7764/obitel.24.e.cc>

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

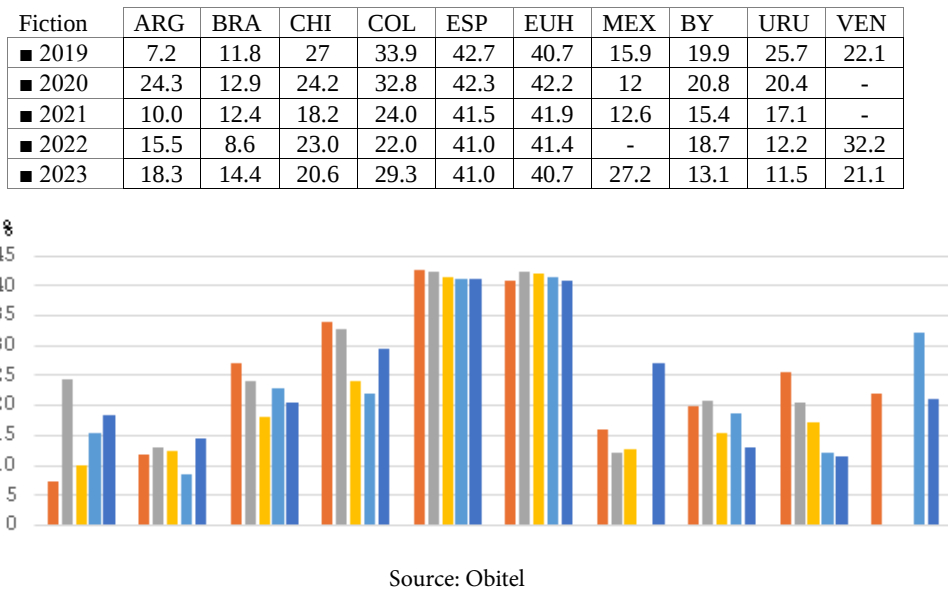


Figure 1 presents the percentage share of fiction in the overall free-to-air television programming of the different countries, as well as the evolution of the genre during the last five years. Therefore, this graph provides information not only on the weight of fiction in 2023, but also on its medium-term 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.

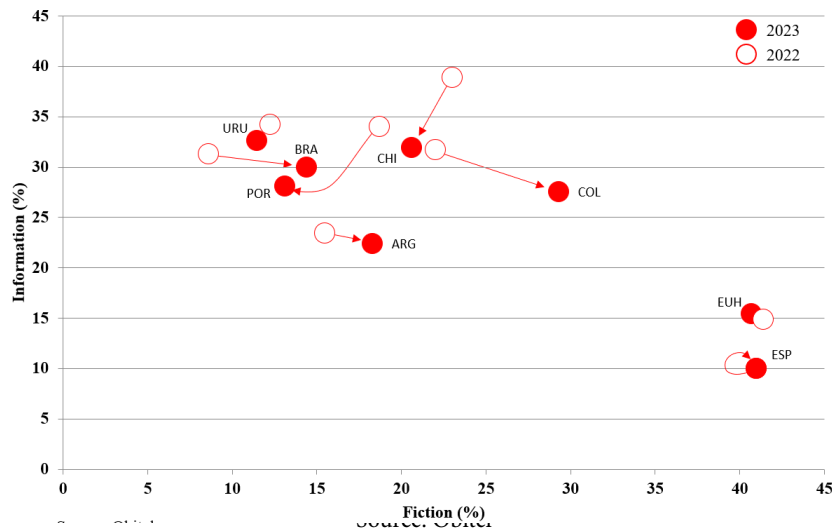


Figure 2 presents the comparative data, between 2022 and 2023, of the presence of fiction and information genres in free-to-air television programming. In 2023, the concentration of the data is lower than in the previous year, when two perfectly separated blocks of countries were identified. In the lower 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

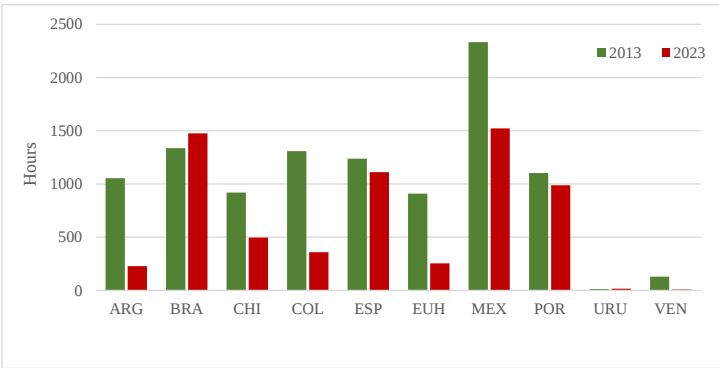
Source: Obitel

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

56

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

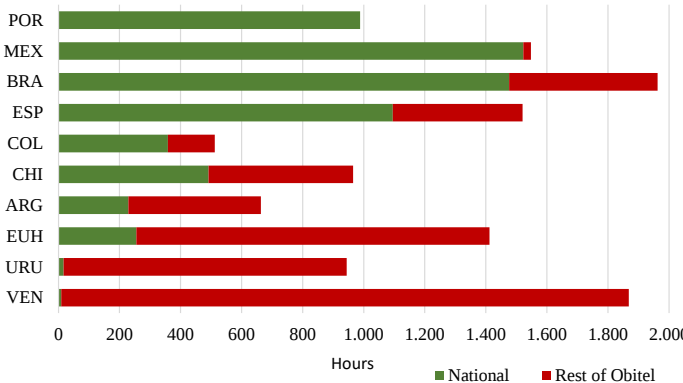
ARG	BRA	CHI	COL	ESP	EUH	MEX	BY	URU	VEN
61%	102%	71%	176%	18%	36%	183%	24%	0%	0%

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

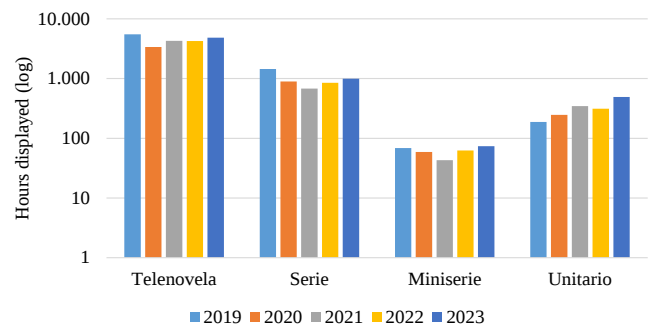
Regardless of the amount of Ibero-American fiction exhibited in each country, in relation to the balance between in-house and imported production, figure 4 clearly shows three groups of countries. Portugal and Mexico appear as countries that are totally or almost totally self-supplied. In Mexico, the 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

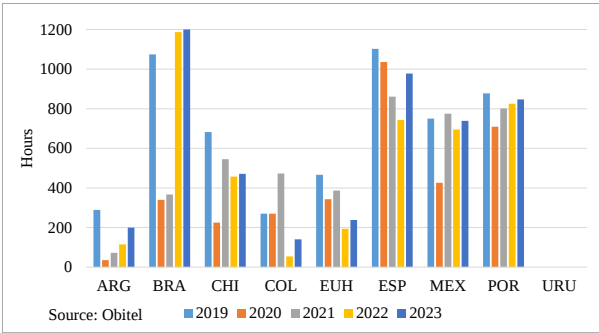
Telenovela is by far the format with the largest presence. Domestic premiere hours screened in 2023 represent 52% more than the sum of the other formats. Although it has not returned to pre-pandemic levels, after two stable years, it grew by 13% in 2023. Series and miniseries, the formats that move more 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



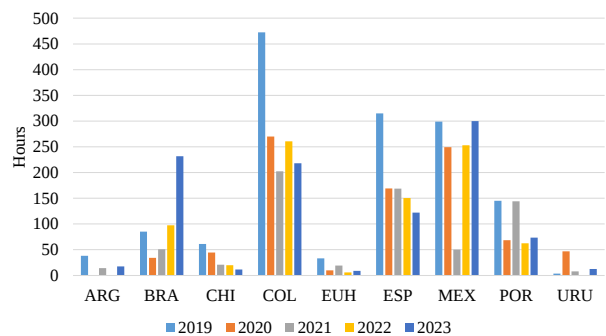
Source: Obitel

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).

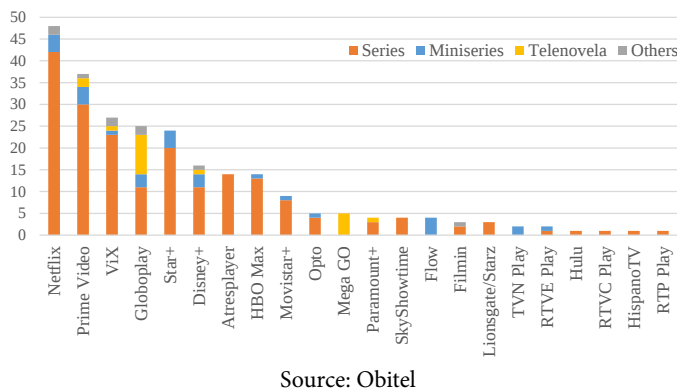
Table 5. Serial fiction titles released by each country on platforms during 2023.

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

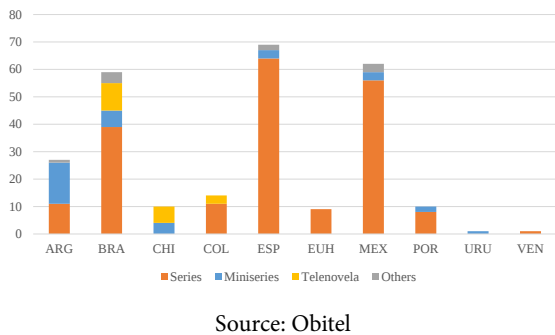
As shown in Figure 8, series reaffirm their dominance among streaming formats, standing at a considerable distance from telenovelas. Series are also predominant on most platforms, except for Mega GO, where telenovelas dominate, and Flow and TVNPlay, which lean more towards miniseries.

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



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



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.

