IBERO-AMERICAN OBSERVATORY OF TELEVISION FICTION

OBITEL 2019

Television Distribution Models by the Internet: Actors, Technologies, Strategies

general coordinators Maria Immacolata Vassallo de Lopes
Guillermo Orozco Gómez

editors Charo Lacalle
Sara Narvaiza

national coordinators Gustavo Aprea, Fernando Aranguren, Catarina Burnay, Borys Bustamante, Giuliana Cassano, James Dettleff, Francisco Fernández, Gabriela Gómez, Pablo Julio, Mónica Kirchheimer, Charo Lacalle, Ligia Prezia Lemos, Pedro Lopes, Guillermo Orozco Gómez, Juan Piñón, Rosario Sánchez, Maria Immacolata Vassallo de Lopes

Ibero-American observatory of Television Fiction

Obitel 2019

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National Coordinators

GLOBO

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Projeto gráfico e editoração: *Niura Fernanda Souza*

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Revisão do português: *Felícia Xavier Volkweis*

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Cep: 90620-100 – Porto Alegre/RS
Fone: (0xx51) 3310.9801
www.editorasulina.com.br
e-mail: sulina@editorasulina.com.br

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Presentation

This yearbook is a result of a partnership that started in 2008 between Globo and the Ibero-American Observatory of Television Fiction (Obitel). The Observatory, which in 2019 publishes its 13th yearbook, aims to monitor and analyze TV fiction production, audience and sociocultural repercussion in Latin America and the Iberian Peninsula, throughout publications and seminars.

Publications:

- *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: one decade of television fiction in IberoAmerica. Analysis of ten years of Obitel*
- *Obitel Yearbook 2018: Ibero-American TV fiction on video on demand platforms*

- *Obitel Yearbook 2019: television distribution models by the internet: actors, technologies, strategies*

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In addition to publications, Globo supports researches and promotes courses and seminars in partnership with Brazilian and foreign institutions on topics considered relevant to society in the areas of communication, arts, management, technology and citizenship.

Obitel national research teams

General Coordinators
Maria Immacolata Vassallo de Lopes (Universidade de São Paulo)
Guillermo Orozco Gómez (Universidad de Guadalajara)

ARGENTINA

Gustavo Aprea (Universidad Nacional de Buenos Aires e Universidad Nacional de las Artes),
Mónica Kirchheimer (Universidad de Buenos Aires e Universidad Nacional de las Artes), coordinators;
Ezequiel Rivero (Universidad de Buenos Aires e Universidad Nacional de Quilmes/Conicet), collaborator.

BRAZIL

Maria Immacolata Vassallo de Lopes (Universidade de São Paulo), coordinator;
Ligia Prezia Lemos (Universidade de São Paulo), vice-coordinator;
Larissa Leda Rocha, Tissiana Pereira, Mariana Lima, Lucas Martins Néia, Andreza Almeida Santos, Daniela Ortega (Universidade de São Paulo), researchers;
Vital Soares da Silva Neto, Helena Sabino Rodrigues Cunha, Diana Soares Cardoso, Gustavo Slachta Rodrigues, Leticia Stamatopoulos, Marcella Medeiros de Oliveira Silva (Universidade de São Paulo), assistants.

CHILE

Pablo Julio (Pontificia Universidad Católica de Chile), coordinator;
Francisco J. Fernández (Pontificia Universidad Católica de Chile), vice-coordinator;
Constanza Mujica (Pontificia Universidad Católica de Chile), researcher;
Valentina Proust, Ángela Godoy (Pontificia Universidad Católica de Chile), collaborators.

COLOMBIA

Borys Bustamante Bohórquez, Fernando Aranguren Díaz (Universidad Distrital Francisco José de Caldas), coordinators;

Hernán Javier Riveros (Universidad Distrital Francisco José de Caldas), researcher;

Diana María Lozano Prat, Zulma Velandia Velandia, Luisa Fernanda Bedoya, Marisol Calixto, Fernando Orjuela, Paola Calderón, Flor María Francia, Jennifer Moncada, Salomé Ortiz Moreno, Yari Nicolás Arias, Susana Celemín (Universidad Distrital Francisco José de Caldas), assistants.

MEXICO

Guillermo Orozco, Gabriela Gómez (Universidad de Guadalajara), coordinators;

Darwin Franco, researcher.

PERU

James A. Dettleff, Giuliana Cassano (Pontificia Universidad Católica del Perú), coordinators;

Guillermo Vásquez (Pontificia Universidad Católica del Perú), researcher;

Thalía Dancuart, Nataly Vergara, Brunella Bertocchi, Kimberli López, Priscilla Castro, Renzo Miranda, Mary Bustinza, María Isabel Ato, Lissi Torres, Sarah Rueda (Pontificia Universidad Católica del Perú), assistants.

PORTUGAL

Catarina Duff Burnay (Universidade Católica Portuguesa), coordinator;

Pedro Lopes (Universidade Católica Portuguesa), vice-coordinator;

Marta Neves de Sousa (Universidade Católica Portuguesa), researcher.

SPAIN

Charo Lacalle (Universitat Autònoma de Barcelona), coordinator;

Beatriz Gómez, Mariluz Sánchez, Cristina Pujol, Sara Narvaiza, Rosa Ferrer, Raquel Crisóstomo, Tatiana Hidalgo, Daria Dergacheva, researchers;

Berta Trullàs, Marta Albújar, collaborators.

UNITED STATES

Juan Piñón (New York University), coordinator.

URUGUAY

Rosario Sánchez Vilela (Universidad Católica del Uruguay), coordinator;

Lucía Gadea, assistant.

Editor's note

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Note on methodology

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First Part

Television fiction in the ibero-american space in 2018

Introduction: Ibero-American television fiction in times of internet distribution

Authors:
James A. Dettleff, Giuliana Cassano, Guillermo Vásquez[1]

This year the Ibero-American Observatory of Television Fiction (Obitel) has focused on the way the television industry is developing its product distribution through the internet, and how this affects television network strategies. Obitel is made up of 12 countries that monitor the production and distribution of television fiction. For this yearbook, however, Ecuador and Venezuela's report are not included, since they did not have the necessary conditions for the work with the required shared methodology.

1. Obitel countries and broadcasting stations

In the following chart, we can see the number of national networks of the ten countries included in this yearbook.

Chart 1. Nation open television networks in Obitel countries in 2018

Country	Private networks	Public networks	Total
Argentina	5	1	6
Brazil	5	2	7
Chile	6	1	7
Colombia	3	2	5
Spain	4	2	6
USA	5	0	5
Mexico	4	3	7
Peru	5	1	6
Portugal	2	4	6
Uruguay	3	2	5
Total	**42**	**18**	**60**

Source: Obitel. Assembled by Renzo Miranda.

[1] Tenured Professors at Pontificia Universidad Católica del Perú.

Private stations predominate in the Obitel scope, with Portugal being the only country with more public stations than private ones. This means that the vast majority of Obitel countries have to perform in a television market system that needs to understand and manage distribution dynamics, while also exploring the new ways in which technology is enabling audiences for television consumption.

The countries include in this yearbook have stressed the downward trend in classic television viewing through broadcasting stations. The countries where this trend is more evident are Argentina, Brazil, Chile, Peru, Portugal and Uruguay. This trend, however, does not mean a total withdrawal from the audiences of television products, since in many cases there is an increase in the consumption of these products through other platforms and media. Therefore, in addition to observing what has happened in broadcasting stations in each country – and, in particular, concerning the production and broadcasting of fiction –, the teams analyze in each chapter how TV distribution models are being developed on the internet, focusing on the actors, technologies and strategies that are part of those models.

The variations in the means of distribution speak to how different audiences now consume television products. This is linked to levels of technological development of each country and especially of each producer or distributor of television products, as well as the facility of access that different companies offer. Over the years, changes have been made in the business scheme, as reported by each country when observing advertising investments.

Broadcasting television continues to be the big recipient of advertising funds, but its participation has been fluctuating. Compared to 2017, Brazil, Colombia, Mexico and Portugal recorded a higher advertising investment last year, although several reports highlight the context of a year with a lot of world sports events, which always attracts more advertising investment. Countries such as Spain, Peru and Uruguay experience a reduction in advertising participation in broadcasting television, which in some cases is part of a decreasing trend of several years.

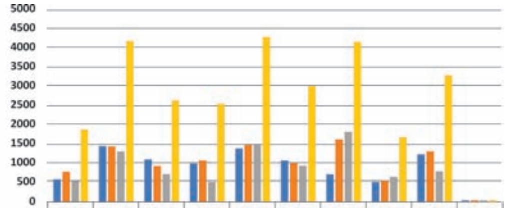
2. Television fiction in Obitel countries

With regard to television fiction in the ten countries included in this yearbook, the different chapters show that in five of them this is the main genre displayed on TV stations (Chile, Spain, United States, Peru and Portugal), while in countries such as Argentina, Brazil or Uruguay news programs occupy the majority of screen time. But broadcasting does not necessarily mean production of new fiction shows, as Brazil and Mexico – two of the countries with the largest television industry in Latin America – stress in their chapters, stating that fiction production has experienced a drastic reduction on stations such as RedeTV! and TV Azteca.

Table 1 gives us an overview of the TV fiction production in hours for each country, comparing it to the two previous years. In most cases, countries have produced fewer hours of fiction than in the previous year. Only Mexico shows a considerable increase, and Peru and Spain show slight sustained growth. Colombia and Portugal have seen their fiction production hours drastically reduced, while Chile shows a constant reduction in the last three years. Colombia shows fluctuations since 2014, where its production increases or decreases year by year, but 2018 is the year in which the reduction of television fiction production was more noticeable.

However, Table 1 must be observed in the context of careful monitoring of what is happening on other platforms or screens, where the fictions of countries that have had a constant production now show a setback. In the years to come of this Observatory, it will be possible to measure if this decrease of hours of premiere fiction in the broadcasting stations is proportional to the increase in production available in other platforms.

Table 1. Hour supply of premiere national fiction (2016-2018)



	ARG	BRA	CHI	COL	SPA	U.S.A.	MEX	PER	POR	URU
Nat. 2016	584	1435	1080	979	1384	1059	706	492	1233	9
Nat. 2017	756	1431	931	1048	1455	1000	1629	553	1293	11
Nat. 2018	527	1299	722	499	1455	933	1807	621	755	16
Total (2016-2018)	1867	4165	2733	2526	4294	2992	4142	1666	3281	36

Source: Obitel. Assembled by Thalía Dancuart.

Considering the fiction production of the last three years, a ranking of the countries according to their production capacity can be established, dividing them into five categories.

Table 2. Production capacity of the Obitel countries

High production capacity (+4,000 hours)	Brazil, Spain, Mexico
Medium-high production capacity (3,000-3,999 hours)	Portugal
Medium production capacity (2.000-2,999 hours)	Colombia, Chile, USA
Medium-low production capacity (1,000-1,999 hours)	Argentina, Peru
Low production capacity (0-999 hours)	Uruguay

Source: Obitel. Assembled by Thalía Dancuart.

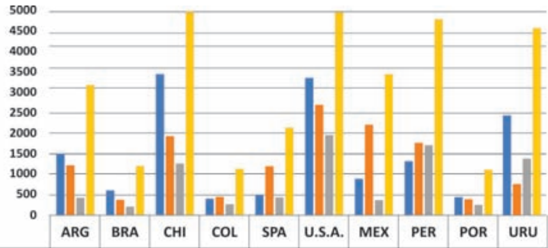
The countries with the highest fiction production capacity between 2016 and 2018 have been Brazil, Spain and Mexico, which are important poles of television fiction production. In this triennium, Mexico has recovered its place at the top of the table, having been considered among the countries with medium production capacity since 2014, while Spain remains among the countries with high productive capacity – the group where it landed last year – thanks to the boost that its television fiction production has since 2015.

The position of the United States is also noteworthy, since Spanish-language TV fiction has decreased, but it still maintains its place as an average production capacity country. In previous years, it was considered as high production capacity. Finally, the constant reduction of television fiction production in Argentina stands out. Argentina produced an average of 1,100 hours per year, but in recent years its production has been reduced by half, placing it as a country with medium-low production capacity, along with Peru, where the TV fiction industry is much smaller than in the other countries. As stated before, Venezuela, which was once a country with extensive production of television fiction, has not been able to meet the conditions to join this yearbook. Perhaps if the data for 2018 were obtained, it would have shown how much the Venezuelan crisis affected its TV industry.

Although a reduction in the production of fiction can be observed in some countries, there has been an increase in TV fiction shows on public stations. In Peru, the state-owned station has a clear focus on news and entertainment. But in 2018 its fiction production increased considerably. Something similar happened in Brazil, where two public stations produced 12 fiction shows, as opposed to two private networks that stopped producing them.

These levels of national production must be monitored in combination with their distribution to other countries. Brazilian fiction products, for example, have seen a decrease in the screens in other countries, although the United States stresses in its chapter that the Brazilian setback has not been about the number of titles, but about the production company. In 2018, the fiction produced by Record reached a presence never achieved by Globo’s fictions in the US market.

Table 3. Hour supply of premiere Ibero-American fiction (2016-2018)



	ARG	BRA	CHI	COL	SPA	U.S.A.	MEX	PER	POR	URU
Iber. 2016	1504	606	3470	417	505	3364	894	1328	461	2457
Iber. 2017	1238	377	1957	449	1218	2705	2214	1777	396	776
Iber. 2018	439	234	1289	282	441	1969	351	1717	274	1392
Total (2016-2018)	3181	1217	6716	1148	2164	8038	3459	4822	1131	4625

Source: Obitel. Assembled by Thalía Dancuart.

Table 3 shows the broadcasting of Ibero-American fiction from the Obitel region in the other countries, both imported and premiered in the last three years. It can be observed that the leading countries of imported Ibero-American fictions have been the United States and Chile. However, it is important to note that both countries have a marked decreasing trend of imported fiction productions; in 2018, Chile broadcasted almost one-third of what it broadcasted in 2016. If we examine the national production in these countries (Table 1), we see that the trend is similar, so it cannot be inferred that the reduced presence of Obitel fiction programs is due to higher national production. We can assume that there is a tendency to broadcast less fiction in this triennium.

Peru and Uruguay are next, with more than 4,500 hours of imported Obitel fiction that has premiered in the last three years. Both countries were within the smallest groups of production capacity, and therefore it is understandable that they have a large number of imported fiction hours.

Brazil, Colombia and Portugal have the fewest hours of broadcasted imported fiction, with fewer than 300 hours in 2018. The three countries show a clear diminishing tendency to broadcast fiction shows from other Obitel countries. Finally, the reduction of hours of Ibero-American fiction in Argentina is also striking, since there has been a reduction of Obitel fiction premieres to less than one-third in the last three years.

3. Themes of television fiction in Obitel countries

The themes approached in TV fiction produced in the countries that are part of this yearbook show several aspects in common. On the one hand, the relationship between fiction and popular music is something that has appeared in past yearbooks in countries such as Brazil, Peru and Mexico, and this year it is also present in Colombia and Uruguay. The cultural industry of popular musical genres that identify each nation is integrated into the television industry, in a combination that means a benefit for both industries. They also become integrating elements of the identity of the countries, as has happened in other parts of the world.

On the other hand, the topics that are part of the national agenda or the contemporary concerns of the different countries have found a space in the stories of television fiction for some time, and 2018 was not different. Issues of gender identity, gender change and transphobia have been present in fiction programs from Argentina, Brazil, Mexico and Uruguay, at the same time that legal issues about gender identity rights were debated in some of these countries. Topics of domestic violence, violence against women, feminicide or sexual harassment in workspaces were present in fiction shows in Brazil, Mexico and Peru, while child or sexual abuse was portrayed in fiction shows from Brazil and Portugal. In these same countries, some fiction programs dealt with the issues of racism and xenophobia, while in Mexico fiction programs dealt with the issue of forced disappearances, a current problem in the country.

An important part of the fiction production in Obitel countries is in the hands of independent production companies, and in certain places independent production companies are on the rise. This is the case of Argentina, where three new production companies have appeared, and in Peru, where two new companies have provided children's fiction to the public station. Chile has also seen a strengthening of its independent production companies, with some stations outsourcing their fiction content. Colombia, the United States and Portugal highlight the strengthening of independent production companies and their production for broadcasting networks, where Portugal highlights the existence of 30 independent production companies.

On the other hand, Mexico and Spain see the strengthening of independent production companies for VoD platform fiction programs, rather than broadcasting television. Finally, Brazil refers to the system of independent producers, their possibilities of accessing resources and their high participation in the production of premiere fictions, both in broadcasting stations and in VoD platforms.

4. Monitoring VoD in 2018

Although the ventures linked to VoD are confined mainly to the private sector, there are some public initiatives that also use these systems, like Argentina and Uruguay.

A common element already anticipated even before this combined monitoring has been the significant presence of Netflix as a leading platform, chosen by most users on their respective countries. This can be seen in Argentina, Brazil, United States and Mexico.

Table 4. VoD in Obitel countries

	ARG	BRA	CHI	COL	SPA	USA	MEX	PER	POR	URU
VoD linked to broadcasting networks	1	7	9	3	6	26	1	6	2	3
VoD linked to subscription networks	5	39	2	2	2	142	8	6	4	8
VoD linked to telecom enterprises	5	6	4	2	3	16	3	4	11	4

VoD without links to networks	7	26	5	1	5	35	12	4	5	4
TOTAL	**18**	**78**	**20**	**8**	**16**	**219**	**24**	**20**	**22**	**19**

Source: Obitel. Assembled by Guillermo Vásquez.

The numbers registered by the United States regarding the types of VoD categorized here are overwhelming in comparison to the other countries. The strength of this country lies on the VoD systems linked to subscription networks, but it also exceeds the rest of the categories. Since the United States is the headquarters of large companies and conglomerates dedicated to entertainment, these results are not surprising. It almost triples the overall figures of Brazil, the second country with the most VoD platforms identified.

Brazil, despite having a sizeable audiovisual industry in the region, lags behind the statistics obtained by United States, but, in turn, it triples the overall result of Mexico, the third country in the ranking. However, Brazil does not remain the leader in all cases of VoD, since Chile and Portugal have higher numbers in VoD platforms linked to open television stations and in those linked to telecommunications companies, respectively.

The group of mid-range countries, with 16 to 24 VoD platforms, is led by Mexico, which, together with Argentina, mainly shows numbers for streaming in systems without links to television networks.

Peru and Uruguay show results that privilege VoD systems related to subscription networks, around the same as Mexico's numbers. Colombia, which closes the general results, gives more space to VoD systems linked to broadcasting networks, like Spain and Peru, which are also present in this area. Although we can say that most Obitel countries share some general totals to a certain extent, the balance leans slightly towards the Brazilian side and clearly toward the Latin United States.

Something besides what is shown in this table is the economic benefit that comes from the use of VoD. The scenarios presented are multiple. Some countries have been able to gather estimates at the level of monetary income – Argentina, United States, Mexico or Portugal –, while others – Brazil, Chile, Colombia, Spain, Peru and Uruguay – have only managed to get estimates or trends of VoD penetration in their territories. There is a gradual increase in the number of users or subscriptions, but the speed at which it occurs depends on legal, technological and commercial conditions in each of the countries.

It is still challenging to get precise figures in all countries, because the companies dedicated to the sector do not disclose their economic benefits or their subscribers' number, as part of their corporate policies. Meanwhile, companies dedicated to users and behavior measurement of VoD platforms, are also limited, since several users watch their content in pirate platforms, building an inaccurate scenario of this environment in constant transformation.

Table 5. National and Ibero-American premiere fiction in VoD systems in 2018

	ARG	BRA	CHI	COL	SPA	USA	MEX	PER	POR	URU
Premiere national titles	2	20	1	6	16	56	16	5	0	3
Premiere Ibero-American titles	17	23	37	17	7	12	8	23	39	85
Co-productions	2	0	7	1	1	17	2	2	1	7
TOTAL	**21**	**43**	**45**	**24**	**24**	**85**	**26**	**30**	**40**	**95**

Source: Obitel. Assembled by Guillermo Vásquez.

Table 5 shows what each country has determined as premiere content in VoD systems linked to a specific territory. Uruguay has the highest number, mainly thanks to the number of webseries that have been considered as a part of this category. It is followed a short distance by what is offered in the US market, which is related to national premieres and co-productions.

Brazil, Chile and Portugal follow them. It is important to observe how in Brazil national and Ibero-American premiere content are almost the same, with no co-production this year. Ibero-American premiere titles are the ones that dominate in Chile and Portugal, far exceeding the offer from the other two categories.

Argentina, Colombia, Spain, Mexico and Peru have between 20 and 30 releases in VoD. The three South American countries are mainly with Ibero-American premieres, while Spain and Mexico follow primarily relying on original national fiction productions.

About transmedia production strategies, the markets of Spain and Portugal stand out for their expansion of the narrative universes of *La Catedral del Mar*, producing the fiction *La Cripta*, and *Apaixonados*, webseries and app for mobile phones and tablets respectively. In Spain, the strength of Movistar+ is confirmed, which has mobilized the Spanish transmedia panorama with the universe developed for *La Peste*.

In Argentina, Mexico and Peru, transmedia expansion strategies go beyond the fictional pact of the central narratives to give way to the discussion and presentation in the public sphere of issues related to gender identity, homosexuality and violence against women. *100 Días para Enamorarse*, the hashtag #Aristemo and *Ojitos Hechiceros 2* bet on giving visibility and empowering sensitive issues in the different countries of Latin America.

Transmedia production strategies in Brazil, Colombia and the United States focus on social networks, YouTube channels and the participation of fans with their comments on Twitter. *Segundo Sol* stood out for its presence on Twitter and highlighted the predominance of national fiction in Brazil. *La Reina del Flow* produced fan pages, clips, screenshots and music platforms via streaming. *El Señor de los Cielos* triggered an argument in social media focused on the removal of Aurelio Castillo from the story and the separation, for health reasons, of Rafael Amaya from the seventh season of the show.

5. Theme of the year: television distribution models by the internet: actors, technologies, strategies

The theme of this year elicits three characteristics that stand out in the Obitel countries of this yearbook. The first one is the struggle to retrieve data, information about actors, technologies and strategies due to its opacity and, ironically, to its invisibility. The relative novelty and fluidity of the sector and the fact that communication companies do not disclose data from that universe have been the main problems.

The second is the local presence of containers of global content such as Netflix, YouTube, Google, Facebook, Movistar+ and Amazon Prime Video. These companies share network infrastructure in Obitel countries to bring their contents closer to the end users. Netflix is the streaming platform with the highest presence and apparent penetration in the Obitel scope, distinguishing itself from others with its own production and also co-productions, which turns up in content diversity, a wide offer of narrative genres, formats and nationalities of audiovisual products.

And the third characteristic is the centrality of YouTube to become the platform that the largest number of broadcasting TV stations have adopted to offer their content, redirect their audiences to their own channels and promote their shows.

This first approach to the distribution models of television by the internet in Obitel countries makes evident the strong hegemony of US conglomerates in the supply and distribution of content over the internet. This hegemony is reflected in content offered by platforms and the infrastructure levels of the network of their network system: internet providers, content distribution networks, and digital intermediaries. The Silicon Valley corporations (Netflix, Amazon, Hulu, Google, iTunes) have become the most important internet television distributors, which demonstrates the power of the economic capital associated with the cultural industries that provide new meanings in the new digital platforms.

Therefore, the interesting thing to highlight in this comparative point of the Obitel countries is the local data. In Argentina, there are four major economic groups in the market that concentrate cable television, mobile telephone service and broadband connectivity: Grupo Clarín (Cablevisión, Fibertel and Nextel), now merged with Telecom (Arnet and Personal); Telefónica (Speedy and Movistar); América Móvil (Claro); and DirecTV. Small companies and cooperatives, in general, make up the "other" category and their market share is marginal at the national level, although in some local markets they reach significant quotas.

In Brazil, it is important to highlight Globoplay, a national service launched in 2015 as part of Globo group, a digital repository that offers fiction content. Almost a decade after the implementation of television distributed over the internet in Brazil, it continues to demand new content formats and different business models beyond media adaptation. Currently, in Brazil, Netflix holds the most prominent position in the new television industry distributed over the internet.

The Colombian digital scenario is undergoing a transformation directly linked to several issues. These include: the penetration and expansion of communication technologies; the unevenness between the pace of public policies and the dynamics and speed of the initiative of the private sectors; the capacity to offer and distribute their own content; the routines and expectations of media communities; and the purchasing power of different social sectors against the different ways of consuming television.

In Chile, web portals are the leading players in internet distribution models. Companies in the telecommunications sector such as ClaroTV, Movistar Play, VTR Play and DirecTV on Demand offer access to audiovisual content of national and international production. Currently, some of these companies allow access to VoD content on mobile screens, but with incipient added value. On the other hand, Netflix has consolidated an audience, with 35% of Chileans subscribed to the platform.

The United States identifies four levels of participation within the VoD infrastructure in the local industry: gateways for internet television VoD; internet service providers; content distribution networks (CDNs); and digital intermediaries.

The convergence between telecommunications companies and OTT services made 2018 the year of promotion of digital platforms in Spain. Movistar+ is the most important content platform, thanks to its exclusive content offering strategy based on its commercial agreement with HBO, while in Mexico the lack of regulation for OTT stands out, leaving local industries unprotected for producing and distributing local content.

In Peru, América Televisión stands out. The station made the biggest investment and efforts to supply television over the internet, and in 2018 it is moving towards connectivity in its different screens and platforms: broadcasting signal, digital platforms and cable. With América TVGO, it seeks to introduce some of the new ways of distributing television content locally.

In Portugal, RTP Play stands out, since the station allows the consumption of its shows on its digital platforms before their premiere on broadcast television. This shows the public service vision in Portugal, which also leans towards digital as the central axis for the distribution of RTP's audiovisual content.

Finally, Uruguay stresses the importance of state-owned company Antel, which is the most important access source to the internet in Uruguay. Antel has a joint venture with Netflix to offer its streaming service, and in 2016 it launched an International Data Center, which gave them the possibility of becoming a regional provider of data services.

Second Part

Fiction in Obitel countries in 2018

1

Argentina: drop in audience and production, growth of agenda items in the narrative[1]

Authors:
Gustavo Aprea[2], Mónica Kirchheimer[3], Ezequiel Rivero[4]

1. Argentina's audiovisual context in 2018

The fall of the audience remains constant, the total hours of fiction broadcast is reduced, and audiences continue to leave the screen of open television. However, in 2018 the serial fiction offering was more permeable to the social agenda than in previous years, without losing either its genre or its production values. After more than fifty years, a new open signal is presented, and it seeks a positioning.

The communications market in Argentina emphasizes its historical concentration and promises to take it to levels never seen before through the ongoing merger between the monopolistic telephony company Telecom and Cablevisión, the cable operator dependent on multimedia Clarín. The media system is currently governed by two national laws intervened since late 2015 through decrees and resolutions that operate under a logic of *faits accomplis*, transforming the structure of the sector without the need for parliamentary discussion of a new legal text.

[1] The Obitel Argentina team thanks 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] UBA – UNA: https://orcid.org/0000-0001-9388-6960.
[3] UBA – UNA: https://orcid.org/0000-0002-3319-0520.
[4] Conicet/UNQ – UBA: http://orcid.org/0000-0002-8124-0975.

1.1. Open television in Argentina

The open television system in Argentina is made up of six channels with national coverage. TV Pública is part of the Federal System of Media and Public Content and is financed with contributions from the National Treasury, official advertising, levies provided by the Law on Audiovisual Communication Services and other own resources. The other five channels are privately managed.

Chart 1. National open television channels in Argentina

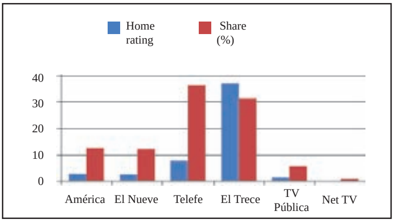
Private networks (5)	Public networks (1)
América 2 (channel 2) El Nueve (channel 9) Telefe (channel 11) El Trece (channel 13) Net TV	TV Pública (channel 7)
TOTAL NETWORKS: 6	

Source: Obitel Argentina

The four traditional channels reach the entire country through their repeaters: TV Pública, Telefe and El Trece. On October 1, 2018, for the first time in 50 years, a new private national television channel was incorporated: Net TV. Located in the city of Buenos Aires, it belongs to the publishing group Perfil, which has several graphic media and an information platform. This group won a tender from DTT (Digital Terrestrial Television in Argentina) for the award of two signals. So far only one works. TV Pública is the one that covers the largest proportion of the national territory (99.5%). El Trece and Telefe cover all provinces through direct ownership or by association with major local broadcasters. The six national broadcasters transmit their programming through cable television, most of which is privately managed. In less densely populated areas, there is an extensive network of pay TV cooperatives. TV Pública depends on the board of directors of Radio y Televisión Argentina, Sociedad del Estado (RTA S.E.), which operates under the Federal System of Media and Public Contents (SFMyCP), created in 2015. América 2 is part of the América Medios group. El Nueve is part of the international group Albavisión, owned by Mexican Ángel González. Telefe is owned by the American company Viacom Inc.[5], along with eight repeaters from the interior of the country. Clarín holding operates El Trece and owns newspapers, open channels, cable TV networks throughout the country, a digital TV company, internet service providers and a mobile phone company. It also has co-ownership of a news agency and the only newsprint factory, as well as a significant number of companies outside the mass media.

Graph 1. Audience and share per broadcaster

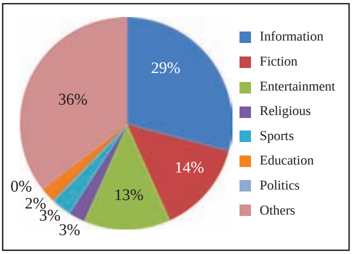
Network	Home rating	%	Share (%)
América	2.9	13.62	13
El Nueve	2.5	11.74	12
Telefe	7.7	36.15	36.5
El Trece	6.7	31.46	31.5
TV Pública	1.3	6.10	6
Net TV	0.2	0.94	1
TOTAL	**21.3**	**100**	**100**



Source: Kantar Ibope Media and Obitel Argentina

Graph 2. Genres and hours broadcast on TV programming

Genres broadcast	Number of hours	%
Information	12731:41:00	29.062882
Fiction	6223:30:00	14.205454
Entertainment	5830:35:00	13.309349
Religious	1080:30:00	2.4660654
Sports	1466:09:00	3.3458226
Education	947:27:00	2.1623879
Politics	0:00:00	0
Others	15528:52:00	35.448039
TOTAL	**43808:44:00**	**100**



Source: Kantar Ibope Media and Obitel Argentina

[5] Viacom Media Networks is involved in the cable signals Comedy Central, MTV, Nickelodeon, VH1 and Paramount Channel. Since 2017, Guillermo Campanini and Darío Turovelzky, both with experience in television and commercial management at Viacom, have been in charge of the management.

During 2018 the rating of all public TV channels decreased. Comparatively, the number of hours devoted to sports programs increased as a result of the broadcasts of the World Cup in Russia, which also marked the best average obtained in the rating and general share of TV Pública. The premiere of *El Marginal 2* allowed the public signal to achieve a position in the top ten for the first time in more than two decades.

Telefe was the most watched signal, away from its traditional competitor El Trece, which had the biggest drop in audience levels. At the same time, two of the channels with the lowest reach (El Nueve and TV Pública) had insignificant low ratings. Another signal that was strongly affected was América TV, which lost almost 75% of its audience. The new signal Net TV had a scarce incidence within the set and ranked sixth. This marked fall in open TV contrasts with a slight increase in the audience levels of pay TV.[6]

Telefe led thanks to the fact that it maintained a more constant general rating level, relying on prime time entertainment programs (*La Voz Argentina*, *Susana Especiales* or *PH*) or on Turkish *telenovelas*. For its part, El Trece sustained its major events with some of its fictions (*Las Estrellas*, *Mi Hermano es un Clon* and *Simona*); and some of the hits of previous years, such as the entertainment program *Showmatch* or the journalistic show *PPT*, reduced their relative importance. Beyond its good performances in the central schedules, part of its fall with respect to previous seasons is also related to the lesser interest aroused by the rest of the programming.

1.2. Pay TV

According to Lamac data[7], pay TV penetration per household remained almost stable, rising from 81.8% in 2017 to 81.99% in 2018. As a whole, it added 8.18 rating points and reached 52.8% of

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[6] According to information from the Ente Nacional de Comunicaciones at https://datosabiertos.enacom.gob.ar/home.

[7] Available at http://www.lamac.org/es/metricas-de-tv-paga.

the share, reinforcing the trend of recent years, in which pay TV has a higher percentage of screen audience than open TV.

In this context of distribution and with the direct entry into the Argentine audiovisual market of large cable television operators such as Viacom (the new owner of Telefe, the main free TV signal) and TNT (licensee of the World Cup transmissions), the partnerships between local channels that produce fiction and international companies are intensified. For programs with a higher production level, a double simultaneous exhibition is established in the same week: through free TV and in the cable signal. The new association implies the standardization of a format: the miniseries that can be exhibited on both open and cable television as well as on VoD platforms. Although in 2018 co-production between cable and local channels was reduced, the relationship with the internet intensified. In some cases, the promotion of platforms launched by local conglomerates offers the possibility of accessing the full season of the miniseries available. In short, within the scope of the production of serial audiovisual fictions, there is a deepening tendency to generate projects designed to circulate through several screens.

1.3. Advertising investments of the year: in TV and in fiction

Although during the development of this chapter the Argentine Chamber of Media did not release official figures on advertising investment in 2018, it is estimated to have reached $36 billion against $28 billion the year before. Although the increase in the figures is significant in absolute terms, it should be read in terms of the increase in inflation, which during the year reached 47.6%, implying a decrease in investment in relative terms.[8] At the beginning of 2018 there were high expectations for being the year of the World Cup in Russia, but the strong devaluation of the peso and the inflation significantly reduced the effective investments. In this scenario,

[8] According to data from Catalano (2018).
[9] According to Carboni and Sartori (2019).

open and pay television accounts for 39% of advertising investment, while 28.6% was devoted to the internet.[9]

1.4. Merchandising and social merchandising

The most successful fiction of the year, *100 Días para Enamorarse* (Telefe), developed a social merchandising campaign with wide resonance around the narration of the gender change process of one of the characters (Juana/Juan). Within the framework of the *telenovela*, a series of didactic information on issues related to gender identity change was presented. The character and his mother seek through various instances advice on the problems they are living. Thus, they attend talks with health professionals and psychologists, meetings with self-help groups on gender issues. When Juan makes public his new sexuality in the school where he studies, he receives bullying from his classmates, but, thanks to the action of his teachers, the situation is reversed. In the fiction, a psychologist gives a class in which she explains the concepts of transsexuality, gender, difference between sexuality and gender, sexual orientation and gender identity. In addition, the physical transformation of the character is presented in an exemplary manner.

1.5. Communication policies

Government policy on services and media continues to develop within the framework of weak legality. Upon assuming his presidential mandate in 2015, Macri substantially reformed existing legislation by decree: Audiovisual Communication Services Law (26,522) and Argentina Digital Law (27,078). Despite the changes introduced, which affect the original conception of communication as a public service, both laws remain in force. What was initially presented as a transitory instance ended up being the framework in which the government developed its policy for more than three

[9] According to Carboni and Sartori (2019).

years. This situation in practice orients regulation in favor of larger private commercial actors and generates greater concentration of ownership.

At the beginning of 2019, the Commission for the Defense of Competition endorsed the decision of the Ente Nacional de Comunicación that allowed the merger between Cablevisión (the pay TV distributor of Clarín Group) and Telecom (one of the largest fixed and mobile telephony companies in the country). The new conglomerate controls 42% of fixed telephony, 34% of mobile telephony, 56% of fixed broadband internet connections, 35% of mobile connectivity and 40% of pay TV. Thus, the greatest concentration of communication in Argentine history was achieved and exceeds all the limits set by the laws that are still in force, no matter how many reforms have been introduced.

The economic adjustment plan implemented by Hernán Lombardi's management, at the head of the Federal System of Media and Public Contents (SFMyCP) since its inauguration, in 2015, intensified during 2018. Government policy turned TV Pública into a space for broadcasting external productions, reruns and just six and a half hours live. The station does not even have the possibility of broadcasting live events of relevant interest, such as the G-20 summit in Buenos Aires, the inauguration of the Youth Olympic Games, or the superclassics between River and Boca for the Libertadores Cup final.

Some significant events show the management's disinterest in the growth of a public good that it should defend. In 2017, Horacio Levin, the channel's Executive Director, resigned. The whole year 2018 went by without a replacement being appointed. The news manager suspended the weekend newsreels in order not to pay overtime, despite the active opposition of the channel's staff. During 2018 the workers of TV Pública did not receive any type of salary increase, although the country suffered an inflation of more than 40% annual.

The SFMyCP allowed two of the signals that were the mainstays of state content production, the children's Paka-Paka and Encuentro, to be removed or displaced from the cable offer without any protest. The lack of definition with respect to a strategy that articulates the contents, the devaluation of the own production and the constant decrease of the budget are taking TV Pública to a dead end. This seems to be the government's true proposal for the state media.

1.6. Digital and mobile connectivity infrastructure

According to a private report[10], in the second semester of 2018 in Argentina there was 40,875,900 cell phone lines active and in constant growth: Claro (35.5%), Movistar (34.5%), Personal (27.8%) and Nextel (2.2%). As for the average turnover, the ranking by active lines of each telephone company changes in favor of Movistar, which billed 33.2% of the total market in 2018. The total turnover of the sector was 10,843 million pesos during the year. Fixed telephony continues the sustained fall that has occurred for ten years, and the coverage of fixed telephony also falls from 71.54% in 2017 to 70.08% in 2018.

In relation to the development of internet accessibility in Argentina, the number of fixed broadband accesses increased by 4% between 2017 and 2018, doubling the average growth in Latin America and matching the world average. According to the Argentine Chamber of Internet (Cabase)[11], by the end of 2018 the network covers 63.8% of connectivity in homes with a very unequal distribution according to the regions of the country, ranging from 106.2% in the city of Buenos Aires to 21.4% in the province of Formosa. The cable modem is established as the most important technology and with the greatest projection for access to networks, with 3.80

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[10] Available at http://www.carrieryasoc.com/2019/03/27/mercado-celular-argentino-2019/#more-948.

[11] Available at https://www.cabase.org.ar/wp-content/uploads/2018/09/CABASE-Internet-Index-II-Semestre-2018.pdf.

million connections, surpassing the 3.57 million ADSL, in a trend that continues since the second half of 2017. At the same time, fixed wireless connections almost doubled those existing in the previous year and reached 165 thousand subscribers. Optical fiber continues with its sustained growth, reaching 217 thousand connections.

1.7. Independent production companies

Only four of Argentina's six channels have created fictions during 2018. Telefe continued its policy of co-producing and buying programs from independent producers. Its hit *100 Días para Enamorarse* was co-produced with Underground and *Sandro de América* with The Magic Eye. Through Viacom, the network that owns the signal, it co-produced *Rizhoma Hotel* with Kuarzo Entertainment and *Morir de Amor* with LCA Producciones and the platform Cablevisión Flow. El Trece continued to base its fictional programming on its associated production company Pol-ka. The new network Net TV only bought one series from Kuarzo Entertainment, *Millennials*. TV Pública based all its programming on the work of independent producers; three series come from Incaa's almost disappeared promotion fund and, although they were produced several years ago, they are released for the first time in a national signal: *Aquellos Días Felices* (2014), *Encerrados* (2015) and *La Chica que Limpia* (2017). *Estocolmo*, by Kapow and StoryLab, was produced and released on Netflix during 2016. Only four releases are recent productions, out of which *La Caída* was made by Azteka Films and the other three are second seasons of programs already broadcast by the channel. *La Vida Según Roxi 2*, by La Matildita, and *Sí y Solo Sí*, by Manda, are small productions, while the second season of *El Marginal*, by Underground, was made to be exhibited by Netflix.

From this description, it can be seen that there are still some historical independent producers, such as LCA Producciones and Underground, whose trajectory is only linked to fiction. Three new production companies appear: Kuarzo Entertainment, which follows the international Endemol and deals with some fictions, but specializes in entertainment programs; The Magic Eye, associated with the international distributor Telefilm Group; Azteka Films, associated with Kuarzo Entertainment. And, finally, it is registered that the abundant production generated by the state promotion fund that operated between 2010 and 2015 is still being used.

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

Table 1. Fictions broadcasted in 2018 (national and imported; premieres and reruns; co-productions)

PREMIERE NATIONAL TITLES – 18 **Telefe – 5 national titles** 1. *100 Días para Enamorarse* (comedy) 2. *Golpe al Corazón* (*telenovela*) 3. *Morir de Amor* (miniseries) 4. *Rizhoma Hotel* (unitary) 5. *Sandro de América* (miniseries) **El Trece – 4 national titles** 6. *Las Estrellas* (*telenovela*) 7. *El Lobista* (miniseries) 8. *Mi Hermano es un Clon* (*telenovela*) 9. *Simona* (*telenovela*) **El Nueve – 0** **América – 0** **Net TV – 1 national title** 10. *Millennials* (series) **TV Pública – 8 national titles** 11. *Aquellos Días Felices* (miniseries) 12. *El Marginal 2* (miniseries) 13. *Encerrados* (unitary) 14. *Estocolmo* (miniseries) 15. *La Caída* (miniseries) 16. *La Chica que Limpia* (series) 17. *La Vida Según Roxi 2* (miniseries) 18. *Sí y Solo Sí 2* (miniseries)	**El Trece – 0**** **El Nueve – 7 titles** 4. *El Señor de los Cielos* (series – USA) 5. *La Doble Vida de Estela Carrillo* (cont. *telenovela* – Mexico) 6. *La Esclava Blanca* (*telenovela* – Colombia) 7. *La Rosa de Guadalupe* (*telenovela* – Mexico) 8. *Mi Marido Tiene Familia* (*telenovela* – Mexico) 9. *Mujeres de Negro* (*telenovela* – Mexico) 10. *Sin tu Mirada* (*telenovela* – Mexico) **TV Pública – 0** **RERUN TITLES: 3** **Telefe – 1 title** 1. *Casados con Hijos* (series – Argentina) **El Trece – 0** **América – 0** **Net TV – 0** **El Nueve – 1 title** 2. *Marimar* (*telenovela* – Mexico)

CO-PRODUCTIONS – 2 1. *Kally's Mashup* (miniseries – Argentina/Mexico) 2. *Bichos Raros* (miniseries – Argentina/Chile) **PREMIERE IMPORTED TITLES – 10** **Telefe – 3 titles*** 1. *José de Egipto* (miniseries – Brazil) 2. *Justicia por Mano Propia* (series – Brazil) 3. *Perra Vida* (miniseries – Brazil)	**TV Pública – 1 title** 3. *Historia de un Clan* (miniseries – Argentina) **TOTAL PREMIERE TITLES: 30** **TOTAL RERUN TITLES: 3** **GENERAL TOTAL TITLES: 33**

*Telefe broadcast six Turkish *telenovelas*: *El Sultán* (cont.), *Elif*, *Kara para Ask*, *Qué Culpa Tiene Fatmagul*, *Todo por mi Hija* and *Una Parte de Mí*.
**El Trece broadcast the Turkish *telenovela Amor en Guerra*.
Source: Kantar Ibope Media and Obitel Argentina

In 2018, 30 titles were released, nine fewer than the previous year, and the number of reruns also fell. As in the last two years, Telefe and El Trece broadcast a total of nine of their own fictions. Telefe and TV Pública participated in co-productions with Mexico and Chile respectively. TV Pública maintains its fiction offering with a privilege of short duration formats, generally produced with state funding. Outside Obitel's scope, seven Turkish fictions were broadcast, with varying degrees of rating.

Table 2. Premiere fiction in 2018: countries of origin

Country	Titles	%	Chap./ ep.	%	Hours	%
NATIONAL (total)	**18**	**60**	**579**	**49.3**	**479:00:00**	**49.7**
OBITEL COUNTRIES (total)	**10**	**33.3**	**525**	**44.7**	**438:20:00**	**45.4**
Argentina	18	60	579	49.3	479:00:00	49.7
Brazil	3	10	38	3.2	24:00:00	2.5
Chile	0	0	0	0	00:00	0
Colombia	1	3.3	54	4.6	46:00:00	4.8
Ecuador	0	0	0	0	00:00	0
Spain	0	0	0	0	00:00	0
USA (Hispanic production)	1	3.3	45	3.8	61:20:00	6.4
Mexico	5	16.7	384	32.7	308:20:00	32
Peru	0	0	0	0	00:00	0
Portugal	0	0	0	0	00:00	0
Uruguay	0	0	0	0	00:00	0
Venezuela	0	0	0	0	00:00	0

CO-PRODUCTIONS (total)	**0**	**0**	**0**	**0**	**00:00**	**0**
Argentinian co-productions	**2**	**0**	**71**	**6**	**47:20:00**	**5**
Co-productions between Obitel countries	**0**	**0**	**0**	**0**	**00:00**	**0**
TOTAL	**30**	**100**	**1175**	**100**	**964:40:00**	**100**

Source: Kantar Ibope Media and Obitel Argentina

The number of national releases remained similar to 2017, falling only from 19 to 18. However, the fictional release of Obitel continues to fall. This trend, already noticed in 2017, continued during 2018 due to changes in El Nueve's programming policy, which reduced the number of *telenovelas* in its evenings and oriented its programming towards cycles of varieties and live talk shows. This implied a significant drop in the total number of hours of fiction released in Obitel scope (around 1,200 in 2017) to less than half. Thus, the number of hours of serial fiction broadcast premiered in 2018 is almost the same between national production and that of the Obitel area (not counting Turkish-language feature-length fiction). The international co-productions that began to be seen in recent years are maintained, but in smaller numbers.

If we consider the number of national titles released, the miniseries is imposed over the other formats. This type of short fiction was mostly programmed by TV Pública, although to a lesser extent also by the other channels, including the new free TV channel Net TV, which began broadcasting in October 2018. As in previous years, Obitel's fiction imposes the *telenovela*.

Table 3. Formats of national and Ibero American fiction

Format	National						Ibero-American					
	Titles	%	C/E	%	H	%	Titles	%	C/E	%	H	%
Telenovela	5	25	421	64.8	389:10:00	73.8	6	60	442	84.2	354:20:00	80.8
Series	3	15	87	13.4	55:20:00	10.5	2	20	61	11.6	73:30:00	17
Miniseries	10	50	108	16.6	66:30:00	12.6	2	20	22	4.2	11:00	3
Telefilm	0	0	0	0	00:00	0	0	0	0	0	00:00	0
Unitary	2	10	34	5.2	16:00	3	0	0	0	0	00:00	0
Docudrama	0	0	0	0	00:00	0	0	0	0	0	00:00	0
Others (soap opera. etc.)	0	0	0	0	00:00	0	0	0	0	0	00:00	0
Total	**20**	**100**	**650**	**100**	**527:00:00**	**100**	**10**	**100**	**525**	**100**	**438:50:00**	**100**

*Co-production titles are included in the national calculation.

Source: Kantar Ibope Media and Obitel Argentina

Table 4. The ten most watched titles on open television

	Title	Country of original idea or script	Channel	Format/ genre	N. of chap./ ep. (in 2018)	Time slot	Rating	Share
1	*100 Días para Enamorarse*	Argentina	Telefe	*Telenovela*/ comedy	125	Prime time	15.1	24.3
2	*Sandro de América*	Argentina	Telefe	Miniseries/ biopic	13	Prime time	14.7	25.9
3	*Simona*	Argentina	El Trece	*Telenovela*/ comedy	154	Prime time	10.5	17.0
4	*Justicia por Mano Propia*	Brazil	Telefe	Series/ drama	16	Prime time	10.3	18.4
5	*Las Estrellas*	Argentina	El Trece	*Telenovela*/ drama	17	Prime time	10.2	19.2
6	*El Marginal 2*	Argentina	TV Pública	Miniseries/ drama	8	Prime time	9.5	14.4
7	*Mi Hermano es un Clon*	Argentina	El Trece	*Telenovela*/ comedy	84	Prime time	8.8	14.0
8	*Golpe al Corazón*	Argentina	Telefe	*Telenovela*/ drama	41	Prime time	8.2	18.2
9	*El Lobista*	Argentina	El Trece	Miniseries/ drama	10	Prime time	7.6	14.2
10	*Rizhoma Hotel*	Argentina	Telefe	Unitary/ drama	21	Prime time	6.7	14.2
Total productions: 10				**Foreign scripts: 1**				
100%				10%				

Source: Kantar Ibope Media and Obitel Argentina

Table 4a. The ten most watched national titles on open television

	Title	Country of original idea or script	Channel	Format/ genre	N. of chap./ep. (in 2018)	Time slot	Rating	Share
1	*100 Días para Enamorarse*	Argentina	Telefe	*Telenovela*/ comedy	125	Prime time	15.1	24.3
2	*Sandro de América*	Argentina	Telefe	Miniseries/ biopic	13	Prime time	14.7	25.9
3	*Simona*	Argentina	El Trece	*Telenovela*/ comedy	154	Prime time	10.5	17.0
4	*Las Estrellas*	Argentina	El Trece	Series/ drama	17	Prime time	10.2	19.2

5	*El Marginal 2*	Argentina	TV Pública	*Telenovela*/ drama	8	Prime time	9.5	14.4
6	*Mi Hermano es un Clon*	Argentina	El Trece	Miniseries/ drama	84	Prime time	8.8	14.0
7	*Golpe al Corazón*	Argentina	Telefe	*Telenovela*/ comedy	41	Prime time	8.2	18.2
8	*El Lobista*	Argentina	El Trece	*Telenovela*/ drama	10	Prime time	7.6	14.2
9	*Rizhoma Hotel*	Argentina	Telefe	Miniseries/ drama	21	Prime time	6.7	14.2
10	*Morir de Amor*	Argentina	Telefe	Unitary/ drama	13	Prime time	6.3	15.2
Total productions: 10				**Foreign scripts: 0**				
100%				0%				

Source: Kantar Ibope Media and Obitel Argentina

Compared to 2017, there was a slight drop in the average rating and share of the ten most watched titles. In 2018, only one foreign fiction entered the top ten, unlike 2017, when three Brazilian titles made the list. Telefe and El Trece share the most watched fictions, with five and four titles respectively. The novelty of the year is that, for the first time since Obitel published its reports, TV Pública managed to place a fiction among the ten most viewed. *El Marginal 2*, prequel of the series of the same name broadcast by TV Pública in 2017, debuted halfway through the year on the state-owned channel, achieving a peak of 11.5 rating points on its first broadcast – a figure that brought it closer to the top positions in its time slot and represented an unusual and isolated event for the channel's cold screen, whose programming generally does not reach the two rating points.

Table 5. Audience profile of the ten most watched titles: gender, age, socioeconomic level

Title		Channel	Genre %		Socioeconomic level %			
			Women	Men	ABC1	C2	C3	D
1	*100 Días para Enamorarse*	Telefe	59.3	40.7	20.7	23.2	27.4	28.7
2	*Sandro de América*	Telefe	56.9	43.1	10.1	26.4	30.3	33.2
3	*Simona*	El Trece	58.2	41.8	17.5	24.0	27.5	31.0
4	*Justicia por Mano Propia*	Telefe	59.8	40.2	15.4	20.1	30.8	33.7
5	*Las Estrellas*	El Trece	58.7	41.3	26.9	25.1	24.8	23.1

6	*El Marginal 2*	TV Pública	41.3	58.7	22.0	26.2	27.4	24.5
7	*Mi Hermano es un Clon*	El Trece	54.1	45.9	11.9	34.9	26.2	27.0
8	*Golpe al Corazón*	Telefe	60.9	39.1	14.1	16.7	31.5	37.6
9	*El Lobista*	El Trece	54.5	45.5	12.2	29.7	29.3	28.8
10	*Rizhoma Hotel*	Telefe	61.5	38.5	20.4	21.8	26.3	31.5

Títulos		**Channel**	**Age groups %**				
			4-12	**13-18**	**19-24**	**35-44**	**45+**
1	*100 Días para Enamorarse*	Telefe	18.3	18.3	23.3	21.5	18.6
2	*Sandro de América*	Telefe	19.9	16.1	19.1	21.2	23.6
3	*Simona*	El Trece	13.4	28.7	22.6	19.1	16.2
4	*Justicia por Mano Propia*	Telefe	15.1	18.1	25.2	19.8	21.8
5	*Las Estrellas*	El Trece	12.8	24.7	21.2	24.2	17.0
6	*El Marginal 2*	TV Pública	13.6	26.4	30.9	14.8	14.3
7	*Mi Hermano es un Clon*	El Trece	13.1	24.5	20.8	22.4	19.1
8	*Golpe al Corazón*	Telefe	18.6	17.2	26.3	20.0	17.9
9	*El Lobista*	El Trece	12.2	27.4	23.2	18.4	18.8
10	*Rizhoma Hotel*	Telefe	19.7	15.2	24.7	17.4	23.0

Source: Kantar Ibope Media and Obitel Argentina

On average, 56% of the audience of the most viewed fictions are women. The exception is *El Marginal 2* (TV Pública), whose theme and narrative treatment attracted a greater number of male audiences. In terms of socioeconomic level, nearly 60% of the audience is concentrated in segments C3 and D, the lowest income segments. Forty-five percent of the audience is between 13 and 24 years old, while 40% are people aged 34 or over. Cycles such as *Simona* (El Trece), *Las Estrellas* (El Trece) and *El Marginal 2* (TV Pública) helped to capture more young audiences in 2018, but the general trend toward aging the audience of serialized fiction on free TV continues.

3. Monitoring VoD in 2018

During 2018, Argentina intensified the trend of growth of video on demand platforms and the decrease, aging and impoverishment of free TV audiences. Faced with this international panorama, television channels with production capacity adopt a double policy. On the one hand, in order to complete hours of programming, they buy long serial fictions at a low cost in relation to local production, such as the seven Turkish *telenovelas* that were released. On the other hand, they try to partner with international cable channels (TNT, Fox and HBO) as well as with VoD platforms, such as Netflix and Cablevisión Flow, in order to face projects of shorter duration (mini-series) and higher level of production. In this way, they seek to insert themselves into a market that tends more and more to globalization and multiplication of exhibition screens.

3.1. VoD in Argentina

Among the VoD services with the greatest presence in Argentina, we can find: the "new entrants" not linked to traditional TV channels, such as Netflix; initiatives linked to free TV channels; pay TV signals; cable operators and telecommunications companies. In the case of Argentina, there are also state-owned online video distribution services, such as Cine.ar Play, from the Instituto de Cine y Artes Audiovisuales (Incaa), and Cont.ar, from the Sistema Federal de Medios y Contenidos Públicos[12], which, in general terms, offer public media content, along with state-financed films and fiction series. Despite the large number of providers, according to data from the consulting firm Ovum (2018), by 2018, Netflix concentrates 55% of the VoD market in Argentina, with 2.4 million subscribers, followed by Claro Video (América Móvil), with 21%, and Flow (Cablevisión), with 15%.

Chart 2. VoD in Argentina

	Platforms	Total
VoD linked to open TV	MiTelefe (Viacom)	**1**
VoD linked to pay TV	HBO GO, Drama Fever (Warner Bros.), Fox Play, TNT GO, WatchESPN	**5**

[12] Since 2016, these free online distribution services have replaced the audiovisual production repositories financed by the national State, which had interconnected web spaces (Bacua and CDA, for television production and as a fiction repository on various screens, and Odeon, for cinematographic production).

VoD linked to telecom and pay TV	Flow (Cablevisión), Claro Video (América Móvil), Movistar Play (Telefónica), DirecTVGo (AT&T), Sensa (Colsecor)	**5**
VoD without links to TV channels	Netflix, Qubit.tv, MUBI, Vivo Play, Crackle, Cinear Play, Cont.ar (Estado Nacional)	**7**
TOTAL SUM		**18**

Source: Obitel Argentina

3.2. Profits of VoD systems

According to Dataxis estimates, VoD OTT services would generate around US$ 1,6 billion in 2018 in the main markets of Latin America alone, of which US$ 115 million would correspond to Argentina. On the other hand, the consulting firm Ovum estimated that, in that country, only the bundling agreements between VoD services and telecommunications and pay TV companies would generate, for the former, profits of US$ 1,501,254 in 2018.

3.3. Analysis of VoD in 2018: national and Ibero-American premiere fiction

The original on-demand contents most requested by Argentines in 2018 were *Stranger Things* (Netflix), with more than 2 million views between July and September, followed by *The Handmaid's Tale* (Paramount Channel). Obitel's fiction appears in third place, with *La Casa de Papel* (Netflix) and again in fifth place with the biopic *Luis Miguel* (Netflix). *Edha*, the first original Argentine production series premiered on Netflix, launched in early 2018, ranked 66th among Argentine preferences.[13]

[13] Source: https://insights.parrotanalytics.com.

Table 6. National and Ibero-American fictions exhibited in 2018 in VoD systems

National premiere titles	Ibero-American premiere titles	Co-productions
Netflix – 2 titles 1. *Edha* (series – Argentina) 2. *Encerrados* (series)	**Netflix – 14 titles** 1. *La Casa de Papel* (series – Spain) 2. *Tiempos de Guerra* (series – Spain) 3. *Las Chicas del Cable* (series – Spain) 4. *Fariña* (series – Spain)	**Netflix – 2 titles** 1. *Narcos: Mexico* (series – Colombia/USA) 2. *Luis Miguel* (series – Mexico/USA)
	5. *Alias J.J.* (series – Colombia) 6. *Paquita Salas* (series – Spain) 7. *Elite* (series – Spain) 8. *El Chapo 3* (series – Mexico) 9. *Club de Cuervos 3* (series – Mexico) 10. *Ingobernable 2* (series – Mexico) 11. *La Balada de Hugo Sánchez* (series – Mexico) 12. *Yo Potro* (series – Mexico) 13. *La Casa de las Flores* (series – Mexico) 14. *Diablero* (series – Mexico) 15. *3% 2* (series – Brazil) 16. *El Mecanismo* (series – Brazil) 17. *Samantha!* (series – Brazil)	
Total: 2	**Total: 17**	**Total: 2**
TOTAL SUM: 21		

Source: Obitel Argentina

Only the offer exhibited on Netflix in 2018 was considered. Other VoD platforms that also distribute national content, such as Flow (Cablevisión), often do it simultaneously with open TV and sometimes also with pay TV, due to international co-production agreements, so it could not be considered an online release, but an additional distribution channel. As for Netflix, the company has in its catalogue a total of 15 national series produced in different years and already broadcast by national open channels, but only one, *Edha* (2018), is an original production of the platform. The case of *Encerrados* is particular because it is a unitary series financed through the promotion contests carried out by the national State in previous years, but which had not premiered until Netflix acquired the distribution rights.

Table 7. Premiere fiction in VoD in 2018: countries of origin

Country	Title	%
NATIONAL (total)	**2**	**9.5**
OBITEL COUNTRIES (total)	**17**	**80.9**
Argentina	2	9.5
Brazil	3	14.2
Chile	0	0.0
Colombia	1	4.7
Ecuador	0	0.0
Spain	6	25.6
USA (Hispanic production)	0	0.0
Mexico	7	33.3
Peru	0	0.0
Portugal	0	0.0
Uruguay	0	0.0
Venezuela	0	0.0
CO-PRODUCTIONS (total)	**2**	**9.5**
Argentinian co-productions	**0**	0.0
Co-productions between Obitel countries	**2**	0.0
TOTAL SUM	**21**	**100.0**

Source: Obitel Argentina

The national fiction series on Netflix are a minority in relation to other productions from other Obitel countries, such as Mexico, Spain and Brazil, where the platform has been a pioneer and more prolific in the production of local content. The figures given by this sample are in line with a broader study carried out on the entire catalogue of Netflix Argentina in February 2019: in Argentina, it offers 2,956 titles, of which 1,076 are series and 1,880 are feature films (both cases consider fiction content, documentaries, etc.). Of the total serialized fiction released, less than 3% of the catalog correspond to Argentine content (Rivero, 2019).

Table 8. Formats of national and Ibero-American fiction in VoD

Format	National				Ibero-American			
	Titles	%	C/E	%	Titles	%	C/E	%
Telenovela	–	–	–	–	–	–	–	–
Series	1	100	10	43.5	17	100	216	100
Miniseries	–	–	–	–	–	–	–	–
Unitary	1	–	13	56.5	–	–	–	–
Others	–	–	–	–	–	–	–	–
Total	**2**	**100**	**23**	**100**	**100**	**100**	**216**	**100**

Source: Obitel Argentina

In the spaces that Netflix leaves unoccupied with its general offer, other niche proposals were born, such as Mubi or Qubit, which offer shorter catalogues of "cured" content for a more demanding audience. Finally, the state platforms Cine.ar Play and Cont.ar, both in full growth in number of users, function as distribution channels and in some cases monetization for local productions. The phenomenon of webseries, strongly leveraged by the Universidad Tres de Febrero, in Buenos Aires, also finds its space in state platforms and on YouTube.

4. Fiction Analysis: open TV, VoD and transmedia expressions in networks

Argentina's transmedia reception has not privileged open television or serial fiction. The most successful initiatives in the circulation of characters and situations are linked to specific events that are retaken, satirized and repeated in various fields. In this sense, a creative and inventive capacity stands out (memes, videos, graphic productions) specially in the scope of the information, mainly national politics. Despite (or perhaps because of) that audiences show willingness and capacity for intervention and response with high levels of productivity, free television signals continue with a policy that can be called "zeal" with respect to the programs they broadcast. Not only in relation to fiction, but also in relation to non-fiction, the spaces enabled from television signals that are shown to be active are few. Those most open to the productivity of audiences are the magazines and news programs that occupy the morning and afternoon programming slots. The presentation of a hashtag with which viewers communicate with the program and emit comments, which are read and commented during the show, has become the norm.

Ranking Programas TV Abierta 2018

PROGRAMA	CANAL	FECHA	IMPRESIONES (Vistas)	TWEETS	AUTORES ÚNICOS
Showmatch		13 - Dic	18M	78.3K	35K
La Noche de Mirtha		31 - Mar	16.5M	50.6K	11.7K
Intrusos		04 - Abr	8.7M	11.1K	7.0K
Por el Mundo Mundial		24 - Jun	8.5M	17.5K	11.1K
El Gran Pastelero		24 - Jun	6.3M	16.2K	7.3K
La Voz Argentina		16 - Dic	5.4M	21.4K	8.1K
El Diario de Mariana		21 - Mar	4.9M	11.4K	4.2K
El Marginal 2		04 - Sep	3.7M	10.9K	6.2K
Periodismo Para Todos		20 - May	3.6M	10.2K	4.6K
Combate		31 - Mar	3.1M	60.7K	4.1K

Fuente: Televisión.com.ar

As for the comments from Twitter users, they show a lot of activity, but they are linked to non-fictional programming (in the first place of the conversations there is a reality show), and only in seventh place there is a fiction: *El Marginal 2*. This fiction, comparatively, has more effect on the comments than on the rating of its broadcast on TV Pública.

Channels do not enable spaces that actively articulate transmedia reception. What is proposed, from the television signals, is a second screen contact: their institutional websites offer the viewing of the complete chapters, but they are offered once the premiere broadcast on television screen is over. They also offer viewings on YouTube channels, not necessarily official ones, the possibility of sharing the content of their website on different social networks and at least one fanpage on social networks.

In social network spaces, the fictions produced by free television propose a limited type of interaction, working in a privileged way as a "caller" from the audience to the television screen, and offer very little extra material, such as photographs and backstage.

In this way, to a greater extent, the proposals in social networks from the official pages focus on presenting the content of the broadcasts through questions to the audience that are answered in the development of the chapter of the day or synthesize in a sentence the conflict presented in a specific broadcast.

In previous years, original proposals elaborated from the television signal itself have been highlighted[14]; these are more frequent in fictions aimed at infantile-juvenile audiences, particularly due to the joint development of fiction and the presentation of theatrical programming as well as the assembly of musical bands aimed at the loyal public. A paradigmatic case in this sense is *Violetta* (broadcast by Disney Channel Latin America between 2012 and 2015 and in rerun since then, which turned the young actress Martina "Tini" Stroessel into a musical star), which builds the fictional universe through an important series of events during its development, most of which involved media away from the television screen. This same strategy is what *Simona* presented this year.

100 Días para Enamorarse is another fiction that generated significant audience participation in social networks this year. Beyond the love plot, what presented a debate at the reception that demonstrates the complexity of the audiences' ways of interpretation was the theme of gender identity and gender change.[15] The treatment of this particular topic and its didactic use (see sections 1.3 and 5) generated a wide participation and controversy, reaching statements of total rejection or adhesions, such as that of Katerin Billanueva: "There is pure love

[14] For a development of the transmedia strategies of these fictions, see Aprea and Kirchheimer (2012, 2017).

[15] It is important to point out that the various stories linked to gender choice in the *telenovela* appeared in several of the secondary characters, those who went through various circumstances of discovery and acceptance of their sexual choices, and the debates around them were also permeated by the discussions on the decriminalization of abortion that took place in the national legislature and the struggles for recognition and equality of rights in the diversities that were imposed on a social agenda during the year.

between the two, I would love to find someone equal to Juani, Juani is beautiful and has beautiful voice and very beautiful feelings, I love his person, I just need to leave the fear and go out before everyone and tell what I am”.

The support and rejection generated by the social themes included in the fiction permeated the set of spaces that social networks assigned to viewers of *100 Días para Enamorarse*. These themes and their repercussions on networks were, in turn, the subject of commentary in various programs, both those aimed at the world of entertainment and the informative ones, which multiplied the “commentary effect” with respect to the *telenovela*

5. Highlights of the year

In 2018, one of the new strategies for the distribution of fictional television content became evident. Many of the fictions produced and released (especially those that were relatively successful in terms of audience) by national channels and producers were released again on one of the pay TV signals and in VoD spaces, either in the premium channels of the cable operators or in the streaming platforms. Thus, Viacom released again, on TNT, fictions previously released on free television (Telefe), as is the case of *100 Días para Enamorarse*. *El Marginal 2* was available on Netflix just after its premiere on TV Pública, as well as *El Host*, co-produced by Polka and Fox Network.

In terms of narrative, it could be argued that 2018 was a rather poor year in terms of numbers of broadcast hours and premiered titles. However, there is a certain stylistic and thematic richness, which achieved a very close dialogue with public life in various ways. The fiction was presented in line with the themes of the national agenda: from the spaces of feminist militancy and gender identity, the militancy linked to the women’s movement Ni Una Menos, to the turbulent relationship between justice and politics, through exclusion and violence, all themes that run daily through news portals and opinion programs. In this space it is interesting to highlight two fictions to dimension this dialogue: *100 Días para Enamorarse* and *El Marginal 2*.

100 Días para Enamorarse begins with the story of a couple who decide to split for a hundred days to see if they are still together or not. At the end of the agreed period, the relationship is evaluated from the point at which they can decide to divorce or continue, if their love is what continues to unite them, and not the routine of home and children. The protagonists are accompanied by friends (more or less crossed couples) and relatives who complete the range of characters. This narrative line served as a backdrop and comic relief for other themes that, in secondary stories, ended up winning the scene. The search for the gender identity of a teenager who, throughout the story, will find the tools to face her own identity and assume it implies a central matter. This path worked in an exemplary way, proposing models of response to adverse situations such as bullying or discrimination of those who choose to be different. This theme incorporated strongly didactic segments. In this way, fiction was not only placed in the usual space of a sentimental education (although it maintains the dominant heterosexual model), but explicitly in the didactic space in relation to the way in which one should act in front of situations like the one the character goes through: from how to be able to talk about what happens to the adolescent, her parents, and friends, including how to support and follow the process without pressure, to the legal advice for making the change of gender and name. This process was described by the *telenovela* with a particular detail: we attended family therapy sessions that explained the difference between being homosexual and transgender, between identity and sexual preference, as well as evidenced other ways of constructing identity against the patriarchal hegemonic model, showing homosexual couples with a lesser indication of their sexual preference. In *100 Días para Enamorarse*, alcohol problems, women's need not to submit to the mandates of others and to fulfill their vocation, the difficulties of facing new relationships after a failed marriage, the problem of unwanted teenage pregnancy and clandestine abortion were also discussed.

In another stylistic proposal, more hyperbolized, TV Pública released *El Marginal 2*, prequel to the successful miniseries *El Marginal* (2016), both from Underground. The guarantee of internationalization from the distribution via Netflix implied for this second season of the miniseries about criminal and prison life a notable increase in the characters' stereotyping and violence. The plot was compressed into eight chapters. Although the theme was present in the first season and is not new in this fiction, it could be said that this season's production was more based on realistic fiction and therefore cruder. It was a literal representation of conflicts in a socially taboo environment. The show has a very outstanding cast of actors, associated with quality, and the direction of Ortega and Caetano, two awarded directors. Having established the values of production quality (accentuated by Netflix distribution), the explicit presentation and development of violence place *El Marginal 2* in the context of Latin American offer, which in the company's catalogue is a reaffirmation of the prejudices of a view from outside the class, of morality, of the problem, becoming a for-export story that confirms the common places about Latin America.

6. Theme of the year: television distribution models by the internet: actors, technologies, strategies

The three submarine fiber optic cables that connect Argentina with the internet and the world enter from the Atlantic Ocean, in Las Toninas[16], through three mooring stations. These are three submarine cables that were installed between 1999 and 2000, leveraged in the explosive and worldwide advance of what we know today as the net.

[16] A small coastal city located 330 kilometers away from Buenos Aires.

According to official data from the Ente Nacional de las Comunicaciones (ENaCom), in March 2018 there were 8 million fixed broadband connections in Argentina, an increase of 4% over the previous year. However, the same report gives account of the great asymmetries between the different provinces of the country. While in the city of Buenos Aires the access reaches almost the totality of the population, in some regions the figure is still very low: it is the case of Misiones (31%), Jujuy (23%), Formosa (21%), among others. Four out of every ten accesses have a speed of between 1 and 6 mbps, figures far removed from those observed in OECD countries, but which in general terms allows an acceptable user experience for video consumption.[17] However, the excessive and growing concentration in a few providers and the geographic centralization make the internet in Argentina slow and expensive, even compared to other Latin American countries.

The internet provider Fibertel (Cablevision-Clarín) concentrates 30% of the broadband market nationwide, a figure that will rise to almost 60% after the merger of this company with Telecom. In some places the new merged company would keep 95% of the broadband market.

According to ENaCom, 1.5 million Argentine households (11% of the total) are below the affordability line.[18] Although there is connectivity infrastructure in the area, the price of the service represents an impediment to broadband access and, therefore, to the consumption of any online video content.

According to the Argentine Chamber of Internet, in its *Internet Index* report, traffic multiplied 142 times between 2011 and 2017 (Cabase, 2017). According to this report, 80% of the traffic generated in Argentina respond to content transmitted by Facebook,

[17] Source: http://datosabiertos.enacom.gob.ar/dashboards/20000/acceso-a-internet/.

[18] According to the UN Broadband Commission for Digital Development, if an internet access represents more than 5% of the average monthly income of a household, it is considered to represent a high cost that constitutes a possible barrier to access to the service.

Google (including YouTube) and Netflix, while the remaining 20% are distributed in all other content sources. This figure coincides with those projected by Cisco's *Visual Networking Index* for 2022[19], which allocates 82% of the world's internet traffic to video content.

Eighty percent of the total content circulating on the internet in Argentina is generated by 12 networks, ten of which already have a local presence, including Netflix, Google, YouTube, Facebook, Akamai, RiotGames, Turner and CloudFlare. These companies have installed network infrastructure in the country to bring content closer to end users, lower latency, improve the viewing experience and reduce international traffic costs.

With an area of 2.8 million square kilometers, Argentina is the eighth largest country in the world, a characteristic that represents a challenge in terms of connectivity and makes it difficult to include all the scattered populations in the vast geography. In this context, public service cooperatives emerged in the country, which are peripheral actors that mostly provide services in cities and towns far from large urban centers, making them unattractive commercially. In some cases, cooperatives were born to provide public services, such as drinking water or electricity, and over the years they added, first, basic telephony, cable, then broadband internet and, more recently, pay television.

There are four large economic groups in the market that concentrate the distribution of subscription television, mobile telephony service and fixed broadband connectivity: Grupo Clarín (Cablevisión, Fibertel and Nextel), now merged with Telecom (Arnet and Personal); Telefónica (Speedy and Movistar); América Móvil (Claro) and DirecTV. SMEs and cooperatives in general integrate the heading "others" and their market share is marginal at national level, although in some local markets they reach significant quotas. These actors as a whole, also grouped to the SME sector, capture

[19] Source: https://www.cisco.com/c/en/us/solutions/collateral/service-provider/visual-networking-index-vni/white-paper-c11-741490.html.

18% of the pay TV market, 19% of the fixed broadband provision and 11% of fixed telephony. There are more than 800 cooperatives and SMEs that provide telecommunications and connectivity services in different Argentine provinces (Becerra, 2017; Rivero, 2018).

The geographic extension of the country, the high concentration of providers and the higher costs for users, added to a poor quality connection and deficiencies in the availability of infrastructure in some regions, led the national government to implement the program called Argentina Conectada, in 2011, with the objective of building networks complementary to those of private companies where the two companies that dominate the market do not reach. The plan managed to expand the network laying and the current administration focuses on "illuminating" the laying of about 30 thousand kilometers of fiber optic to make it operational (Baladron, 2018).

The traffic exchange points (IXP) are added to the telecommunications companies, to other transnational companies, to the national State as wholesale provider and generator of network infrastructure, along with a myriad of cooperatives and SMEs distributed throughout the country. As a pioneer in the region, the Argentine Chamber of Internet began to install them at the end of the 90s to improve connectivity in the different provinces. Currently, there are 30 traffic exchange points in the country that operate as cooperatives, bring together 450 members and generate potential benefits for 15 million internet users.

We have designed this section to focus on the actors, companies and agents who are part of the network infrastructure and those who enable internet connectivity, in the understanding that it is an exclusive prior step for the consumption of any type of online content, particularly video, which, by its characteristics, requires stable and powerful connections for a satisfying experience. As already mentioned in the VoD monitoring of this chapter, Netflix is the VoD distribution company that dominates the local market, but it is no longer seen as an adversary by the traditional infocommunicational actors (telecom and pay TV companies). There is a growing tendency to generate agreements of different depth and integration of offers that are tied between the different services and the subscription to Netflix.

For their part, the most powerful local information players such as Cablevisión or Telefónica seek to retain control over the distribution of content and offer value-added services that make it possible to view content online. The case of Flow, Cablevisión's TV Everywhere system, is emblematic since, in less than two years, it managed to capture 15% of the local video on demand market. As already mentioned, the State has its own distribution platforms: Cine.ar Play, a free and pay-per-transaction service that offers local content, which is a joint creation of the Incaa, in charge of content management, and the Empresa Argentina de Soluciones Satelitales (Arsat), in charge of the technical aspects and that provides the hosting and streaming of videos. For its part, the Sistema Federal de Medios y Contenidos Públicos launched in 2018 the Cont.ar platform, which brings together live streaming of all public radio and television signals and a catalog of series and documentaries made with contest funds. In this case, the technological solution of Amazon Web Services (AWS) was chosen, so that the contents and data of the users are hosted in the servers of this company. Finally, YouTube has been adopted by all free TV signals. The case of TV Pública is particular because almost all of its linear content is uploaded there. Private channels use it to promote their programs and redirect users to their own websites, as a way of disseminating digitalized archive material.

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2

Brazil: streaming, all together and mixed[1]

Authors:
Maria Immacolata Vassallo de Lopes, Ligia Prezia Lemos

Team:
Larissa Leda Rocha, Lucas Martins Néia, Mariana Lima, Tissiana Pereira, Andreza Almeida Santos, Daniela Ortega

1. Brazil's audiovisual context in 2018

Data[2] show that the country is struggling to overcome the effects of the 2014-2016 economic contraction cycle. This period has interrupted a process of expressive social ascension of almost a decade, and the amount of poor people increased in Brazil from 2016 to 2017. Although the long and acute recession had already ended, growth was slim in 2018. These factors, among others (corruption, security, etc.), are intimately linked to the political changes that followed.

Following the world political scenario of ascension of the far right, the Brazilian year was marked by an electoral campaign of great polarization, which culminated with the election of Jair Bolsonaro, representative of this current. Given this context, paradoxically, we have verified important advances in the audiovisual industry, with the accelerated and permanent incorporation of digital communication. Regarding television serial fiction, these advances vary in the way it is produced and even perceived and distributed. This new order should be studied and analyzed in detail aiming at

[1] Obitel Brazil thanks Kantar Ibope Media, which provided information to make it possible to carry out the presented analyses.

[2] IBGE. *Síntese de indicadores sociais*. Dec. 2018.

understanding its multiple meanings, considering the possible improvements as well as future problems. There is one certainty: the digital transformation is in full force in Brazil, in television series and films, communication and regulation policies, changes in the audience, narratives of fiction and social media – in an effervescence in which, "all together and mixed", a new configuration seeks to organize itself, still poorly visible.

1.1. Open television in Brazil

The Brazilian television system consists of seven national networks, of which five are private and two public. RedeTV! and Band did not produce new national fiction in the year, but the latter issued a series co-produced by Colombia, the United States and Mexico.

Chart 1. National open television stations in Brazil

Private stations (5)	Public stations (5)
Globo Record TV SBT Band RedeTV!	TV Brasil TV Cultura
Total stations = 7	

Source: Obitel Brazil

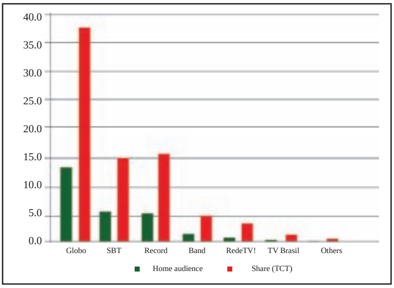
As for public broadcasters, TV Brasil and TV Cultura premiered, together, 12 national titles, a higher number than SBT and Record TV, with three and five productions respectively. We highlight TV Brasil, which exhibited ten fictions, broadcasting non-habitual regions in the television scene, such as the states of Bahia, Goiás, Maranhão and Acre[3], and addressing topics such as governmental policies, issues of class, gender, black representativity, sustainability, and minority rights in productions set in peripheries

[3] The initiative, as we highlighted in the last yearbook, is the result of the program Brasil de Todas as Telas, which aims to expand the production of public TV.

and *favelas*. TV Cultura, in turn, decreased from six to two national productions in 2018, bringing a fictional African country as central scenario of *África da Sorte* and the protests of June 2013 in Brazil in *Mostra Tua Cara!*. In addition, the network presented two seasons of the Colombian *telenovela Eu Sou Franky* (Nickelodeon Latin America, 2015).

Graph 1. Audience and TV share by station in 2018

Station	Home audience	Share (TCT)
Globo	13.29	37.62
SBT	5.55	15.69
Record TV	5.17	14.62
Band	1.20	3.40
RedeTV!	0.52	1.48
TV Brasil	0.23	0.66
Others[4]	0.13	0.38
Paid channels	6.77	19.14
OOC[5]	1.61	4.55
TOTAL	**34.47**	-



Source: Kantar Ibope Media – Media Workstation – 15 markets

The national home audience suffered a slight drop compared to 2017, from 35.80 to 35.34. Globo continued to lead, despite dropping 0.59 points of audience (from 13.88 to 13.29), followed by SBT, which grew 0.28 points (from 5.27 to 5.55), and Record, which increased 0.05 points (from 5.12 to 5.17). In fourth place, Band had a drop of 0.26 points compared to the previous year (from 1.46 to 1.20). On the other hand, RedeTV! had an increase of 0.11 points (from 0.41 to 0.52), and TV Brasil, of 0.07 (from 0.16 to 0.23). The data show a stable situation in the open TV audience, where there was a fall of 0.46 in total. However, the rounding remains stable at 28 points.

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[4] Others: data from Record News, TV Câmara, TV Justiça and TV Senado.
[5] OOC – other open channels: open stations that have no audience published individually.

Pay TV continues to fall, now 1.20 points compared to 2017 (from 7.97 to 6.77), but the set of channels still maintains the second position concerning audience. As always, we emphasize that it is not possible to compare this index to the open channels, since it refers to the sum of the audiences of all pay TV channels.

Concerning the home share of televisions connected to channels (TCT) – also known as TV “pure audience” –, we observed a decline of 1.17% in Globo’s audience[6] in 2017 (from 38.79% to 37.62%), of 3.13% for paid channels[7] (from 22.27% to 19.14%), and of 0.68% for Band (from 4.08% to 3.40%). SBT and Record, on the other hand, obtained a slight increase, from 14.73% to 15.69% and from 14.30% to 14.62%, respectively. As for the other stations, the variation in the TCT does not reach even half a point underneath or above.

Regarding media penetration[8], the audience in the year decreases for newspapers (3.25%), open TV (2.83%), magazines (2.02%) and radio (1.40%). On the other hand, there was an increase for the internet (6.53%), extensive media (3.60%), which includes media such as billboards, cinema (1.29%) and pay TV (0.37%). Open TV continues to be the largest audience, with 86.16% of penetration, followed by the internet, with 82.66%, and extensive media, with 82.47%. The following, by order, are: radio (61.45%), pay TV (39.41%), cinema (16.48%) and newspapers (13.96%).

It is important to highlight: the internet went up to second place in penetration, replacing extensive media, which had occupied this position for two years; and the cinema, in sixth position, surpassing newspapers, which fell to seventh position.

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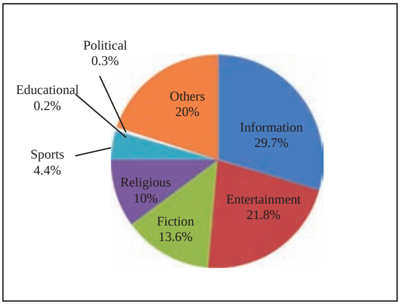
[6] With growth of 0.86% in the previous year.

[7] They have been presenting a decrease since 2017.

[8] Media penetration index from 2017 to 2018: open TV, 89% to 86.16%; extensive media, 78.9% to 82.47%; internet, 76.1% to 82.66%; radio, 62.9% to 61.45%; pay TV, 39% to 39.41%; newspapers, 17.2% to 13.96%; cinema, 15.2% to 16.48%; and magazines, 14.8% to 12.8%. The internet is still the medium growing the most. Source: Kantar Ibope Media, Target Group Index BR TG 2018 II.

Graph 2. Genres and hours broadcasted in TV schedul e[9]

Genres broadcasted	Exhibition hours	%
Information	15595:40	29.7
Entertainment	11430:35	21.8
Fiction	7124:16	13.6
Religious	5270:15	10.0
Sports	2292:06	4.4
Political	183:15	0.3
Educational	95:06	0.2
Others	10500:54	20.0
Total	52492:07	100



Source: Kantar Ibope Media – Media Workstation – 15 markets

As can be verified on the graph, the three genres that have occupied the same position since 2016 remain: information, entertainment and fiction. They form, together, 65.1% of the hours of open TV schedule. However, we point out a small decline in the overall percentage, which has been growing since 2016 (67%). Entertainment lost 1.5%, and fiction lost 0.4% of space, while information remained stable. Regarding the other genres, the oscillation was minimal concerning downward (religious) or upward points (sport, due to the World Cup in Brazil). Emphasis on the political content, in an election year, which exceeded the educational content.

1.2. Pay TV

Although there has been again a shrinkage in the base of pay TV subscribers, the drop of 3% was slightly lower than that of the previous year, of 3.6%. According to Anatel's data[10], the year of

[9] Genres: information: debate, documentary, interview, journalism, news report; entertainment: auditorium, cars and motors, culinary, feminine, game show, humor, children, fashion and beauty, musical, awards, reality show, show; sports: sports, football; fiction: adult animations, film, miniseries, *telenovela*, series; others: not included, rural, health, raffle, telesales, travel and tourism; educational; political; religious.

[10] Cf. http://bit.ly/2SbumDQ. Accessed in: Feb. 2019.

2018 closed with 17.6 million subscribers, a loss of 550 thousand compared to December 2017. Based on previous studies by Obitel, it is possible to conjecture that the competition with OTT services and the current fall in the population's purchasing power are the most important factors in the process.

In terms of technology, the satellite service (DTH) is still the majority in the country, holding 54% of the market, followed by cable, with 42%. It is noteworthy that the fiber optic technology is growing, now with 4% of the market.[11]

The channels of qualified space still outweigh the requirements of the SeAC Law (Law n. 12.485/2011), mainly in the broadcast of independent Brazilian content.[12] The media groups Globo and Fox were the ones that stood out in the dissemination of Brazilian works, including independent ones.

Fiction on pay TV

In the year of 2018, 14 paid channels exhibited Brazilian television fiction, one less than in the previous year. Of those, four were national and ten international (in 2017, there were nine). We had a drop in the number of premiere fiction, totaling 24 (in 2017, there were 30). Regarding genre, they were mostly drama, approaching themes such as police, criminal, and adolescent issues, such as sexuality, romance, and violence. Among the comedies, two made by Porta dos Fundos[13] for Comedy Central stood out. It seems to us that the stagnation of fictional production on pay TV is due to the strong competition of reality shows, which have been increasingly diversified in terms of themes (music, fashion, gastronomy, contests, etc.).

It is worth highlighting the production of a docudrama, *Mil Dias: A Saga da Construção de Brasília* (History Channel), on the

[11] Cf. http://bit.ly/2VPCQ0I. Accessed in: Feb. 2019.
[12] Cf. http://bit.ly/2VMoVbJ. Accessed in: Jan. 2019.
[13] Porta dos Fundos is a video producer for the internet and is the sixth largest Brazilian channel on YouTube.

building of the Brazilian capital, with testimonials, documents and dramaturgy scenes. Also, there was an increase in the viewing of Brazilian series outside the country, with the simultaneous debut of the third season of *O Negócio* (HBO) in over 50 countries.

1.3. Advertising investments: in TV and in fiction

The increase in TV investments observed in 2017 was expanded in 2018. The market invested 10.2% more than in the previous year, totaling R$ 148 billion. In part, this can be explained by the occurrence of the World Cup, which provided a growth in media investments. As in previous years, open TV led the investments, accounting for 50.87% of this funding. The sector concentrated fewer investments than in 2017, but the absolute value applied was higher: R$ 75 billion. Keeping the previous scenario, pay TV appears as the second medium that received the most resources – 14.26% of the investments –, and newspapers were in the third position, with 10.36%.

There was a significant increase in the values destined for cinema and internet pages (display). The surprising high of 580% in the investments in cinema is explained by the expansion of coverage of monitored concession areas, from 14 markets in 2017 to 137 in 2018. Internet pages also received an increase in investments, of 53%, which is justified by the expansion of the monitoring of online vehicles.[14]

In open TV, the main advertisers were, in order: trade; personal hygiene and beauty; financial and security; pharmaceuticals; and consumer services. Public and social administration, which in the previous year was one of the five sectors with the highest investment, fell to sixth place.

[14] Cf. http://bit.ly/2ORIWed.

1.4. Merchandising and social merchandising

In 2018, Globo's *telenovelas* presented merchandising actions somewhat different from the expected. *Segundo Sol*, with an unprecedented partnership[15] between the station and a retail network of furniture and appliances, offered to the public the possibility of buying furniture and utensils that appeared in the show. Named "House of Novela", the project counted with actions that involved the morning show *Mais Você*, the exhibition of the scenarios in subway and train stations in São Paulo, the use of the brand *Segundo Sol* on digital platforms, and outlets of the said retail network as well as a television campaign.

Deus Salve o Rei also drew attention when divulging perfumes of a national brand in a medieval story. The action had developments on Globo's entertainment website, Gshow, and in social networks, which expanded the action and detailed the particularities of each fragrance.

Regarding social merchandising, Globo addressed domestic violence in the series *Assédio*, which reverberated in videos with actresses from the cast interpreting real testimonies of victims.[16] The *telenovelas O Outro Lado do Paraíso*, *Malhação* and *Segundo Sol* and the series *Sob Pressão* presented rendering of service charts at the end of chapters, with particularly strong scenes on issues such as child sexual abuse, violence against women and transphobia. It is worth remembering that the second season of *Sob Pressão* premiered along with a socioeducational action for blood donation.

Malhação stood out with a theme related to education, launching a campaign of appreciation of public schools and addressing issues on the agenda, such as totalitarianism and electoral fraud. The *telenovela As Aventuras de Poliana* (SBT), in its turn, drew attention when addressing bullying, racism and xenophobia also within a school storyline.

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[15] Cf. http://bit.ly/2pfFwXg.
[16] Cf. http://bit.ly/2ETL80u.

1.5. Communication policies

At the end of 2018, the government published a decree establishing new guidelines for telecommunications policies. It was defined that the expansion commitments of the telecommunications services set by Anatel would depend on a series of guidelines, going through the definition of expansion sites for high capacity transport networks, expansion of the coverage of broadband mobile networks, and increased coverage of fixed broadband access networks.[17] In anticipation of the inauguration of the new government, rumors emerged, such as the end of Ancine[18] and regulation of the area to Anatel[19], which increased the climate of uncertainties in the audiovisual sector.

The Brazilian Federal Court of Auditors voted on Sentence n. 2,053/2018, with the analysis of the national broadband policy and the impacts of the competitiveness of the telecommunications sector in regional development. The focus was the elaboration of a medium and long-term broadband national plan, which does not currently exist, thus hindering the implementation of inclusion programs and measurement of their effectiveness.[20]

1.6. Digital and mobile connectivity infrastructure

The access of Brazilians to the internet continues on the rise, as we have pointed out in the last yearbooks. According to IBGE[21], the cellphone connection is preferred by 94.6% of users, and the research also points out that 76.4% of these accesses were performed to watch videos, shows, series and movies. The country is fourth in

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[17] Cf. http://bit.ly/2SWvwyd.
[18] Organ of Brazil's federal government, regulator and supervisor of the audiovisual sector.
[19] Cf. http://bit.ly/2XPJiGD.
[20] Cf. http://bit.ly/2ERkCFd.
[21] Cf. http://bit.ly/2C4SCOv.

the world ranking of internet users, behind only the USA, India and China, respectively.[22]

Due to this growing and constant increase in the watching of videos and series on online platforms, the on-demand services are consolidated in Brazil. Netflix is the most popular, with 18% of the market[23], followed by Globoplay, with 4%, and Telecine Play and Sky Online, with 3% each.

1.7. Independent producers

Brazil has 8,467 independent producers registered in Ancine[24], i.e., allowed to fundraise – through direct or indirect funding of the State – for the realization of audiovisual productions. However, the performance of these agents, driven since 2011 by Law n. 12,485 – also known as Pay TV Law –, has gained strength with open TVs – such as co-productions between broadcasters and producers, sometimes performed with indirect capture of resources, and broadcasting, in the state channels, of titles produced with public funds – and VoD platforms – in which the producers align themselves with large players in the sector.

In 2018, 22 independent producers participated in the production of 53% (24) of the national television fiction titles that premiered on open TV. On pay TV, 100% (24) of the new Brazilian fictions involved 22 independent producers. As for the national fictions for VoD platforms, 70% (14) were carried out by 11 independent producers.

The general universe of Brazilian television fiction in 2018 – the sum of the national totals of open TV, pay TV and VoD (considering only once productions that appeared in more than one of these sectors) – is composed of 80 titles. Of these, 69% (55) had the participation of 45 independent producers. The ones who acted

[22] Cf: http://bit.ly/2NTOVPF.
[23] Business Bureau Survey. Available at: http://bit.ly/2UrRASZ.
[24] Consultation made to the Agency via e-mail on Feb. 14, 2019 and replied on Feb. 26, 2019.

the most with co-productions were: O2 Filmes – *Amigo de Aluguel* (Universal), *Assédio* (Globo/Globoplay), *Cidade dos Homens* (Globo), *Rua Augusta* (TNT) and *Treze Dias Longe do Sol* (Globo); and Conspiração Filmes – *Desnude* (GNT), *Entre Irmãs* (Globo), *Magnífica 70* (HBO), *Sob Pressão* (Globo/Globoplay) and *Um Contra Todos* (Fox) –, with five titles each.

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

Table 1. Fictions broadcasted in 2018 (national and imported; premieres and reruns; co-productions)

PREMIERE NATIONAL TITLES – 45 **Globo – 25 national titles** 1. *Assédio* (pilot episode – VoD premiere) 2. *Brasil a Bordo* (series – VoD premiere) 3. *Carcereiros* (series – VoD premiere) – season 1 4. *Cidade dos Homens* (series) – season 6 5. *Deus Salve o Rei* (*telenovela*) 6. *Entre Irmãs* (miniseries) 7. *Espelho da Vida* (*telenovela*) 8. *Ilha de Ferro* (pilot episode – VoD premiere) – season 1 9. *Infratores* (segment of *Fantástico*) 10. *Malhação – Vidas Brasileiras* (soap opera) – season 26 11. *Malhação – Viva a Diferença* (soap opera) – season 25 12. *Mister Brau* (series) – season 4 13. *Mister Brau – O Filme* (telefilm) 14. *O Natal Perfeito* (single episode) 15. *O Outro Lado do Paraíso* (*telenovela*) 16. *O Sétimo Guardião* (*telenovela*) 17. *O Tempo Não Para* (*telenovela*) 18. *Onde Nascem os Fortes* (*telenovela*) 19. *Orgulho e Paixão* (*telenovela*) 20. *Pais de Primeira* (series) – season 1 21. *Pega Pega* (*telenovela*) 22. *Segundo Sol* (*telenovela*) 23. *Sob Pressão* (series – VoD premiere) – season 2 24. *Tempo de Amar* (*telenovela*)	**TV Cultura – 2 national titles** 44. *África da Sorte* (miniseries) 45. *Mostra Tua Cara!* (series) **CO-PRODUCTIONS – 1** **Band – 1 co-production** 1. *Senhor dos Céus* (series - USA/Mexico/Colombia - VoD premiere) – season 1 **PREMIERE IMPORTED TITLES – 4** **SBT – 2 imported titles** 1. *Que Pobres Tão Ricos* (*telenovela* - Mexico) 2. *Um Caminho para o Destino* (*telenovela* - Mexico) **TV Cultura – 2 imported titles** 3. *Eu Sou Franky* (*telenovela* – Colombia) – season 1 4. *Eu Sou Franky* (*telenovela* – Colombia) – season 2 **RERUNS – 19** **Record TV – 11 reruns** 1. *A Lei e o Crime* (series) 2. *A Terra Prometida* (*telenovela*)

25. *Treze Dias Longe do Sol* (miniseries – VoD premiere) **TV Brasil – 10 national titles** 26. *A Bicicleta do Vovô* (series) 27. *Axogun* (series) 28. *Canal Televisão – Um Morro do Barulho* (series) 29. *Fanátic@s* (series) 30. *Mauani, o Silêncio de Maria* (miniseries) 31. *Meu Skate Não é Enfeite* (series) 32. *Natália* (series) – season 2 33. *O Dia em que nos Tornamos Terroristas* (series) 34. *O Nó do Diabo* (series) 35. *Um Filme de Cinema* (series) **Record TV – 5 national titles** 36. *Apocalipse* (*telenovela*) 37. *Belaventura* (*telenovela*) 38. *Conselho Tutelar* (series) – season 3 39. *Jesus* (*telenovela*) 40. *Lia* (miniseries) **SBT – 3 national titles** 41. *As Aventuras de Poliana* (*telenovela*) 42. *Carinha de Anjo* (*telenovela*) 43. *Z4* (series)	3. *Bela, a Feia* (*telenovela*) 4. *Bicho do Mato* (*telenovela*) 5. *Essas Mulheres* (*telenovela*) 6. *José do Egito* (miniseries) 7. *Luz do Sol* (*telenovela*) 8. *Os Dez Mandamentos* (*telenovela*) – season 1 9. *Os Dez Mandamentos* (*telenovela*) – season 2 10. *Rei Davi* (miniseries) 11. *Ribeirão do Tempo* (*telenovela*) **SBT – 6 reruns** 12. *Mañana es para Siempre* (*telenovela* – Mexico) 13. *Carrossel* (*telenovela*) 14. *Chiquititas* (*telenovela*) 15. *Coração Indomável* (*telenovela* – Mexico) 16. *Sortilegio* (*telenovela* – Mexico) 17. *Teresa* (*telenovela* – Mexico) **Globo – 2 reruns** 18. *Belíssima* (*telenovela*) 19. *Celebridade* (*telenovela*) **TOTAL PREMIERE TITLES: 50** **TOTAL RERUN TITLES: 19** **TOTAL OF TITLES BROADCASTED: 69**

Source: Obitel Brazil

In 2018, the country had an increase of 4.6% in the original national titles displayed on open TV: 45 fictions, compared to 43 in 2017. It is important to remember that, in 2017, there was an atypical high attributed to the productions broadcasted on public TVs.

Regarding new national titles, we noticed a great high of TV Brazil, the public channel, which exhibited ten productions, against six in 2017. SBT had an increase from one to three new national productions. Globo and Record basically maintained the average of the previous year, varying with two extra titles broadcasted by Globo and one less by Record. As for the co-productions, in 2017 there were none, while in 2018 an Ibero-American title was registered by

Band, *Senhor dos Céus* (an international hit series that has been part of Netflix's VoD catalog in Brazil since 2015).

As an important strategy in 2018, 24% of Globo's new national titles first premiered at Globoplay, its VoD platform, an interest of major investments by the station to, after a while, broadcast them in open TV to spread their audience. Joining and mixing, in this way, the everywhere watching with the linear, not to mention the positioning of the brand Globoplay alongside TV Globo. We also noticed a great decline (60%) of new imported fictions, with SBT, the main broadcaster of these titles, being responsible for this reduction, which fell from seven to two titles, and also for a small decrease of the reruns: four, against the five recorded in 2017. TV Cultura, in turn, broadcasted two seasons of a new Colombian juvenile *telenovela*.

Table 2. Premiere fiction in 2018: countries of origin

Country	Titles	%	Chapters/ episodes	%	Hours	%
NATIONAL (total)	**45**	**90.0**	**1999**	**86.3**	**1299:26**	**81.9**
OBITEL COUNTRIES (total)	**4**	**8.0**	**276**	**11.9**	**234:28**	**14.8**
Argentina	0	0.0	0	0.0	0:00	0.0
Brazil	45	90.0	1999	86.3	1299:26	81.9
Chile	0	0.0	0	0.0	0:00	0.0
Colombia	2	4.0	160	6.9	118:04	7.4
Ecuador	0	0.0	0	0.0	0:00	0.0
Spain	0	0.0	0	0.0	0:00	0.0
USA (Hispanic production)	0	0.0	0	0.0	0:00	0.0
Mexico	2	4.0	116	5.0	116:24	7.3
Peru	0	0.0	0	0.0	0:00	0.0
Portugal	0	0.0	0	0.0	0:00	0.0
Uruguay	0	0.0	0	0.0	0:00	0.0
Venezuela	0	0.0	0	0.0	0:00	0.0
CO-PRODUCTIONS (total)	**1**	**2.0**	**40**	**1.7**	**53:20**	**3.4**
Brazilian co-productions	0	0.0	0	0.0	0:00	0.0
Co-productions among Obitel countries	1	2.0	40	1.7	53:20	3.4
OVERALL TOTAL	**50**	**100.0**	**2315**	**100.0**	**1587:14**	**100.0**

Source: Obitel Brazil

Despite the increase in national titles, the number of chapters/ episodes of the year decreased 5.5%, an effect of the continuous growth of short-seriality fictions. The number of hours also dropped 9% compared to 2017.

As for Ibero-American fictions, importations were made only from two countries: Colombia and Mexico, unlike the diverse origins recorded in 2017. The number of chapters/episodes fell 36% compared to the previous year, which was also reflected in the drop in the number of hours (38%). We point out as the cause the fact that SBT, a channel that traditionally imports the highest number of titles, reduced in 71% the number of foreign productions compared to 2017 (see Table 1), privileging reruns.

As occurred in 2017 (for the first time since the beginning of the Obitel records), the number of series exceeded that of national *telenovelas*. This continuity reinforces the tendency already pointed out that the format of short stories is gaining space.

We observed the increase in duration of the exhibited miniseries, with an expressive high (70%). The five productions of this format had a total of 34 episodes – representing an approximate average of seven episodes per story, lasting 35 minutes each. In 2017, there were four miniseries with a total of 20 episodes (average of 5 per production).

Table 3. Formats of national and Ibero-American fiction

Format	National						Ibero-American					
	Titles	%	C/E	%	H	%	Titles	%	C/E	%	H	%
Telenovela	15	33.3	1523	76.2	1074:59	82.7	4	100.0	276	100.0	234:28	100.0
Series	18	40.0	177	8.9	85:01	6.5	0	0.0	0	0.0	0:00	0.0
Miniseries	5	11.1	34	1.7	20:26	1.6	0	0.0	0	0.0	0:00	0.0
Telefilm	1	2.2	1	0.1	1:21	0.1	0	0.0	0	0.0	0:00	0.0
Single episode	1	2.2	1	0.1	0:43	0.1	0	0.0	0	0.0	0:00	0.0
Docudrama	0	0.0	0	0.0	0:00	0.0	0	0.0	0	0.0	0:00	0.0
Others (soap opera, etc.)	5	11.1	263	13.2	116:56	9.0	0	0.0	0	0.0	0:00	0.0
Total	**45**	**100.0**	**1999**	**100.0**	**1299:26**	**100.0**	**4**	**100.0**	**276**	**100.0**	**234:28**	**100.0**

Source: Obitel Brazil

Table 4. The ten most watched titles

	Title	Country of original idea or script	Channel	Format/genre	N. of chap./ ep. (in 2018)	Time slot	Rating	Share
1	*O Outro Lado do Paraíso*	Brazil	Globo	*Telenovela*/ drama	114	Prime time	39.9	58.48
2	*Segundo Sol*	Brazil	Globo	*Telenovela*/ drama	156	Prime time	33.0	49.33
3	*Pega Pega*	Brazil	Globo	*Telenovela*/romantic comedy	7	Prime time	30.7	50.71
4	*Entre Irmãs*	Brazil	Globo	Miniseries/ drama	4	Prime time	30.5	49.48
5	*Treze Dias Longe do Sol*	Brazil	Globo	Miniseries/ drama	10	Prime time	27.2	43.92
6	*O Sétimo Guardião*	Brazil	Globo	*Telenovela*/ magic realism	43	Prime time	26.3	42.19
7	*Deus Salve o Rei*	Brazil	Globo	*Telenovela*/medieval drama	173	Prime time	25.8	40.38
8	*Assédio*	Brazil	Globo	Pilot episode/ drama	1	Prime time	25.1	42.48
9	*O Tempo Não Para*	Brazil	Globo	*Telenovela*/romantic comedy	132	Prime time	24.3	39.36
10	*Tempo de Amar*	Brazil	Globo	*Telenovela*/ romance	66	Prime time	23.2	40.92
Total productions: 10					**Foreign screenplays: 0**			
100%					0%			

Source: Kantar Ibope Media – Metropolitan Regions TR Premium | Obitel Brasil

Reaffirming a consecutive phenomenon, the top ten is formed exclusively by Globo productions. At the top of the table, there are two *telenovelas* exhibited at 9 p.m., followed by one of 7 p.m. and two miniseries. Two short-seriality narratives surpassed the audience of a 9 p.m. *telenovela* (*O Sétimo Guardião*), a fact that in recent years had only happened in 2016, when the miniseries *Justiça* surpassed the 9 p.m. *telenovela A Lei do Amor*.

The first four placed in the table recorded ratings higher than 30 points (in 2017, there were three). Overall, share has increased over previous years. The share of the most watched title rose from 51.91% to 58.48%, compared to 2017, inverting the trend observed since 2014. The share of the second and third places also grew.

Unprecedented fact is a pilot episode of a series produced for VoD, *Assédio*, appearing among the top ten, which allows us to affirm that the strategy used by Globo to promote the release of an on demand series on open TV has proved to be successful.

Table 5. Audience profile of the ten most watched titles: gender, age, socioeconomic level

	Titles	Channel	Gender %		Socioeconomic level %		
			Women	Men	AB	C	DE
1	*O Outro Lado do Paraíso*	Globo	62.3	37.7	31.5	49.4	19.1
2	*Segundo Sol*	Globo	61.6	38.4	30.7	49.7	19.6
3	*Pega Pega*	Globo	63.4	36.6	30.4	48.6	21.0
4	*Entre Irmãs*	Globo	61.6	38.4	30.7	49.7	19.5
5	*Treze Dias Longe do Sol*	Globo	62.0	38.0	30.9	49.7	19.4
6	*O Sétimo Guardião*	Globo	61.7	38.3	30.3	48.6	21.1
7	*Deus Salve o Rei*	Globo	63.5	36.5	31.3	49.1	19.5
8	*Assédio*	Globo	62.2	37.8	31.8	49.2	19.0
9	*O Tempo Não Para*	Globo	64.4	35.6	30.1	49.5	20.4
10	*Tempo de Amar*	Globo	65.9	34.1	31.5	48.8	19.6

	Titles	Channel	Age group %					
			4 to 11	12 to 17	18 to 24	25 to 34	35 to 49	50+
1	*O Outro Lado do Paraíso*	Globo	5.3	5.6	7.6	13.2	25.4	42.9
2	*Segundo Sol*	Globo	5.2	5.3	8.0	13.0	25.8	42.8
3	*Pega Pega*	Globo	5.2	5.8	7.2	12.6	24.6	44.7
4	*Entre Irmãs*	Globo	5.9	6.4	8.2	14.8	26.8	37.8
5	*Treze Dias Longe do Sol*	Globo	5.6	6.8	8.6	14.4	27.2	37.3
6	*O Sétimo Guardião*	Globo	4.6	4.7	7.2	12.6	25.4	45.6
7	*Deus Salve o Rei*	Globo	5.4	5.6	7.3	11.7	24.5	45.6
8	*Assédio*	Globo	5.2	5.7	9.6	14.4	28.1	37.0
9	*O Tempo Não Para*	Globo	5.5	5.5	7.2	11.8	23.8	46.2
10	*Tempo de Amar*	Globo	4.9	5.7	7.5	11.4	22.5	48.1

Source: Kantar Ibope Media – Metropolitan Regions TR Premium | Obitel Brasil

Women remain as the main audience of the top ten fictions, mostly of the 6 p.m. *telenovelas*. In 2018, the watching of the romantic *telenovela* broadcasted at this time (*Tempo de Amar*) reaffirms the trend. Among men, we observed a higher concentration of watching of shows exhibited later. The DE class continues preferring the romance and comedy genres. As for the age group, the audience aged more than 50 years was the one who watched the top ten fictions the most and, as in 2017, maintained the preference for plots that privileged the melodramatic matrices. We highlight the predilection for two genres that are not common: the magic realism of *O Sétimo Guardião* and the medieval drama of *Deus Salve o Rei*.

3. Monitoring VoD in 2018

The video on demand brings structural changes to the audiovisual field in which television fiction circulates, with volume, expansion and fragmentation of platforms that start to occupy considerable space, reconfiguring the production logics and demanding new policies and changes in the industry's regulation.

3.1. VoD in Brazil

In Brazil, the diffusion of streaming technology occurs as a chapter of its internationalization (Ladeira, 2017), dependent on telecommunications enterprises and the systematic adoption of triple play, i.e., the association between telephony, internet, and audiovisual.

Chart 2. VoD in Brazil[25]

Platforms		Total
VoD linked to open TV networks	Globoplay, SBT Online (YouTube), RecordTV (YouTube), R7 Play, EBC Play, Play Plus, Sara Play	**7**
VoD linked to pay TV networks	AXN Play, +Bis, Canal A&E Play, Canal Sony, Cinemax GO, Cartoon Network Go, Esporte Interativo Plus, FishTV, Fox Play, Globosat Play, HBO GO, Netmovies, NET Now, Planet Kids, History Play, Sky Online, Space GO, Telecine On, TNT GO, WatchESPN, Cine Sky, A&EBrasil (YouTube), Sexy Hot Play, Premiere Play,LifeTime, CineBrasil Já, Combate Play, Comedy Central Play, Discovery Kids On, Nickelodeon Play, NOGGIN, Tamanduá TV, Multishow Play, MaxGO, Canal Brasil (YouTube), Arte1 Play, BET Play, Box Brazil Play, Cennarium	**39**

[25] The chart presents a first recognition of the new networks, windows, and distribution connections of the VoD service in Brazil, marked by the convergence, opacity and invisibility calculated by its players (Piñon, 2018).

VoD linked to telecommunication companies	Clarovideo, iTunesStore, Oi Play, Vivo Play, VID+, Brisa Play	**6**
VoD without links to TV networks	Afroflix, Amazon Prime Video, Babidiboo.tv, Crackle, CrunchyRoll, EnterPlay, Google Play, Libreflix, Looke, Microsoft Movies& TV, Mubi, MyFrenchFilm Festival, NBA TV, Netflix, Oldflix, Philostv, ScapCine, SmartVOD, Sony-VideoUnlimited, Univer, Vevo, Videocamp, Vimeo, Xbox Video, YouTube, O2 Play	**26**
TOTAL		**78**

Source: Obitel Brazil

The country has 78 OTT platforms, which transmit 139 live channels and offer a repository of 72 thousand movies and 12.9 thousand series.[26] Despite the expressive content, Brazil is behind other Latin American countries, such as Argentina and Mexico, with 99 and 94 platforms, respectively.[27]

3.2. VoD systems market

Among the Brazilian residences with TV sets, 39% include OTT[28]. As for subscription TV services, they are present in 26% of households. OTT services are present in 85% of households with fixed broadband, which would represent an average of 1.3 OTT per residence. Netflix is the leader of the streaming sector in the country.

Since 2017, cord-cutting phenomenon has been noticed, i.e., the decline in subscription TV services and the growth of OTT. We may speculate that this occurs mainly due to the more competitive prices of the VoD service.

[26] Cf. http://bit.ly/2J0bAuM.
[27] Cf. http://bit.ly/2CdEkdL.
[28] Cf. Amdocs research.

3.3. Analysis of VoD in 2018: national and Ibero-American premiere fiction

In 2018, there was a record in the number of Brazilian fictions that premiered on demand.[29] Following a global movement[30], Brazil had 20 titles for streaming.[31] Netflix presented seven original Brazilian productions with VoD premieres. However, the most important fact of the year was marked by the entry of Globoplay, from Grupo Globo, in the distribution market of Brazilian series exclusively for streaming and international series.

Table 6. National and Ibero-American fiction broadcasted in VoD in 2018[32]

Premiere national titles in VoD	Titles imported from Obitel countries in VoD
Globoplay – 6 titles 1. *Além da Ilha* (series) 2. *Sob Pressão* (series – VoD premiere) – season 2 3. *Carcereiros* (series – VoD premiere) – season 2 4. *Assédio* (series) 5. *Ilha de Ferro* (series) 6. *Onde Nascem os Fortes* (*telenovela*, pilot episode) **Playplus – 1 title** 7. *Terrores Urbanos* (series) **SBTOnline – 1 title** 8. *#CiladasdeNatal* (Instagram webseries) **Netflix – 7 titles** 9. *3%* (series) – season 2	**Netflix – 23 titles** 1. *Narcos: Mexico* (series, Mexico) 2. *Luis Miguel* (series, Mexico) 3. *Diablero* (series, Mexico) 4. *La Balada de Hugo Sánchez* (series, Mexico) 5. *Edha* (series, Argentina) 6. *Tempos de Guerra* (series, Spain) 7. *La Casa de Papel* – season 2 (series, Spain) 8. *La Casa de las Flores* (series, Mexico and Spain) 9. *El Marginal* – season 2 (series, Argentina) 10. *Distrito Salvaje* (series, Colombia) 11. *La Reina del Flow* (*telenovela*, Colombia) 12. *A Ley Secreta* (series, Colombia) 13. *El Chapo* – season 3 (series, USA/

[29] Cf. http://bit.ly/2XPK7iH.
[30] As Ladeira (2017) points out, all around the world, streaming has been guided by the systematic investment in new material.
[31] Until then, the only series produced for an on demand platform had been *3%* (Netflix, 2016).
[32] Brazil excluded from Table 6 the column referring to “national co-productions in VoD with other countries”, since this production modality did not exist in the year.

10. *O Mecanismo* (series) 11. *Samantha!* (series) 12. *Borges* (series) 13. *Gamebros* (series) 14. *Velhas Amigas* (series) 15. *Se Beber Não Ceie* (Netflix, Christmas special) **Fox Play – 1 title** 16. *#MeChamaDeBruna* (series) – season 3 **Multishow Play – 1 title** 17. *Xilindró* (series) – season 3 **Canal Brasil – 1 title** 18. *DR na Rússia* (YouTube webseries) **Net Now – 2 titles** 19. *Se eu Fechar os Olhos Agora* (mini-series) 20. *O Rei do Vale* (series) **Total: 20**	Mexico) 14. *El Recluso (El Marginal)* (series, USA/Mexico) 15. *Ingobernable* (*telenovela*, Mexico) 16. *José José: o Príncipe da Canção* (*telenovela*, Mexico) 17. *As Telefonistas* – season 3 (series, Spain) 18. *Elite* (series, Spain) 19. *Bem-Vindo à Familia* (series, Spain) 20. *Paquita Salas* - season 2 (series, Spain) 21. *El Ministerio del Tiempo* (series, Spain) 22. *Tribu Urbana Dance* (telefilm, Spain) 23. *Club de Cuervos* – season 3 (series, Mexico) **Total: 23**

Source: Obitel Brazil

As for the titles from Obitel countries, we found that, as happened with national productions, the premiere of Ibero-American VoD fictions starts a renovation of audiovisual production, which now uses software for the dissemination of its various contents.[33] There were 23 fictions produced in the Obitel countries, with emphasis on Spain and Mexico. We highlight that the listed Ibero--American fictions premiered in Brazil in 2018, although the exhibition in some of the countries of origin was earlier, such as *El Ministerio del Tiempo*, which premiered in Spain in 2015.

Throughout the year, to compete in the marketplace with Netflix, Globoplay has increased its investments in content, including the international series *The Good Doctor* (ABC), *Killing Eve* (BBC America) and *House* (Fox). In the second semester, there was also

[33] In total, Latin American countries have 253 OTT platforms. Cf. http://bit.ly/2HlPGja.

the launch of two national series, *Assédio* and *Ilha de Ferro*, made for Globoplay and with exhibition of the first episode on open TV. For the new phase, the board of directors of the platform intends to increase the international series to 100 by the end of 2019.[34] The service also bets, as a differential factor, in the content of success produced by Globo itself, mainly *telenovelas*, and about 70 titles are already in the catalog.

Table 7. Premiere fiction in VoD in 2018: countries of origin

Country	Titles	%
NATIONAL (total)	**20**	**46.51**
OBITEL COUNTRIES (total)	**20**	**46.51**
Argentina	2	0.0
Brazil	**20**	**46.51**
Chile	0	0.0
Colombia	3	0.0
Spain	8	0.0
USA (Hispanic production)	0	0.0
Mexico	7	0.0
Peru	0	0.0
Portugal	0	0.0
Uruguay	0	0.0
Venezuela	0	0.0
CO-PRODUCTIONS (total)	**3**	**6.98**
Brazilian co-productions	**0**	0.0
Co-productions among Obitel countries	3	0.0
OVERALL TOTAL	**43**	**100.00**

Source: Obitel Brazil

The productions that premiered on VoD in Brazil reached a total of 43, with 20 (47%) Brazilian titles and 23 (53%) Ibero-American ones. Of these, 7.5% were co-productions among Obitel coun-

[34] Available at: http://bit.ly/2HbEO87.

tries. *El Chapo* and *El Recluso (El Marginal)*, for example, were produced by the United States and Mexico. The latter country also joined Spain for *La Casa de las Flores*. Brazilians also had VoD access to works from Argentina, Colombia, Spain, Mexico and Peru.

Table 8. Formats of national and Ibero-American fiction in VoD

Format	National				Ibero-American			
	Titles	%	C/E	%	Titles	%	C/E	%
Telenovela	1	5	53	22.84	3	13	169	37.23
Series	15	75	157	67.68	19	82.6	284	62.55
Miniseries	1	5	10	4.31	0	–	–	–
Single episode	1	5	1	0.43	1	4.3	1	0.22
Others (webseries, etc.)	2	10	11	4.74	0	–	–	–
Total	**20**	**100**	**232**	**100.0**	**23**	**100.0**	**454**	**100.0**

Source: Obitel Brazil

The series largely dominated the national and Ibero-American streaming panorama, with 34 productions, of which 15 (44%) are Brazilian and 19 (56%) are Ibero-American. Then, in a very distant position, the *telenovela* appears, with one Brazilian production (25%), *Onde Nascem os Fortes*, and three Ibero-American productions (75%), *La Reina del Flow*, *Ingobernable* e *José José: o Príncipe da Canção*. The national fiction also presented one miniseries and two webseries, one on Instagram and one on YouTube[35]; in addition to one single episode on Netflix. These data, albeit initial in the history of streaming in the Obitel countries, leave no doubt that the series is the dominant format.

4. Fictions analysis: open TV, VoD, and transmedia expressions in networks

The development of transmedia expressions in 2018 has proved to be profitable for the fictions in both open and paid television as well as VoD companies. Since smartphones are the main access devices for interaction with fiction and its audience (Lopes and Cas-

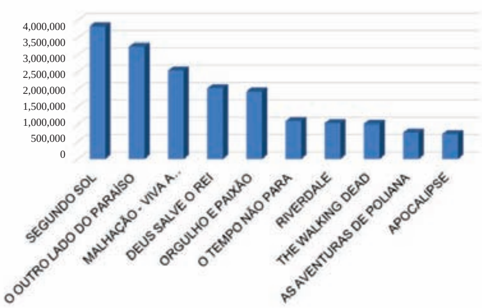
[35] Webseries from the open TV channels Canal Brasil and SBT Online.

tilho, 2018), we observe new strategies to approach the audience through social networks.

This year, Canal Viva, focused on fiction reruns of Globo, extinguished its official page and concentrated all its content on social networks (Instagram, YouTube, Facebook and Twitter), which provoked more interaction with the viewers and boosted the shows, such as the rerun of the *telenovela Vale Tudo* (Globo, 1988), through the hashtags #valetudo and #mordomoeugenio. The strategy of prioritizing social networks, according to the channel, is a way to invigorate the relationship with viewers (the synopsis of the fictions are available on Facebook and excerpts from the *telenovelas* are posted on YouTube).

According to data from Kantar Ibope Media, the *telenovela Segundo Sol* (Globo) was featured in impressions on Twitter, with approximately 4 million tweets and over 646 million impressions (number of times a post was viewed). Data such as this reinforce the dialogical character of fictions, which, driven by social networks, establish network conversations (Fechine, 2017).

Graph 3. Highest-impact titles on Twitter in 2018



Source: Kantar Ibope Media

We observed in the top ten fictions on Twitter the predominance of national narratives, especially from Globo, in the first positions, repeating the top ten of the open TV (whose basis is audience). Only two international productions appear on the ranking, *Riverdale* and *The Walking Dead*, in seventh and eighth places, in a framework in which Brazilian production dominates 80% of the mentions and Ibero-American productions have no mentions at all.

The social themes addressed by the *telenovelas* are inputs for network conversations. In *Segundo Sol*, themes involving sexism, homophobia, religious prejudice and racism stood out in the posts. In a scene that reinforces stereotypes against religions of African origin, the villain made offerings to spiritual entities in gratitude for the success of a plan. Groups linked to Candomblé and Umbanda used the networks to protest against the scene, considered offensive. Racism was also shown by the lack of black representativeness in the *telenovela*.[36]

In terms of VoD and engagement on social networks, Netflix stands out as a success model. The platform was able to conquer the audience with memes, promotional videos, and posts on the networks, with content adapted to the context of each country. On Twitter, the posts referred not only to the fictions, but also to the current political scenario. Another example is the use of local artists to publicize their series in promotional videos on YouTube and Instagram.

As dissemination actions, we emphasize the presence of Globo in the Comic Con Experience (CCXP) and Unlock CCXP, in São Paulo, in early December. In the pop culture events, the company set up seven panels, enabling a relaunch of Globoplay and the dissemination of upcoming streaming premieres. In the stand dedicated to *Ilha de Ferro*, a virtual reality experience was offered by the installation of an oil rig, reproducing the scenario of the series, with a helicopter flight simulator, and a place for taking photos with the costumes of the protagonists.

Also as a way to boost the content of the platform, Globo created the Cine Globoplay, dedicated to the exhibition of films and

[36] Cf. encurtador.com.br/kloDM. Accessed on: Dec. 17, 2018.

first episodes of series broadcasted only by the service. The show debuted in July and is perceived as a tactic to attract subscribers.

5. Highlights of the year

5.1. *Sob Pressão*: the repaginated "narrative of the nation"

In 2018, we highlight not only the investment in series by television stations and VoD platforms, but the diversification of themes. If short stories seem to reflect the *raison d'être* of oral culture[37] (Lopes et al., 2015), their narratives shall fatally address the production context.

In a movement similar to that of 1979 and 1980, with the advent of Brazilian series[38], fictions such as *1 Contra Todos* (Fox, 2016-), *Sob Pressão* (Globo, 2017-), *Carcereiros* (Globoplay, 2017-) and *O Mecanismo* (Netflix, 2018-) reflected and refracted different perspectives of the country. *Sob Pressão* may be the most exemplary product: a medical series, a common genre in American television, whose originality lies in the representation of the precariousness of the Brazilian public health system. Its naturalistic character and the documentary devices approach the series to the characteristics that consolidated the Brazilian *telenovela* as the most representative "narrative of the nation" (Lopes, 2009). The insertion of informational charts at the end of the episodes, in turn, is an example of communicative resource (Lopes, 2009) originated from the practice of social merchandising.

In the second season, the series brought another question: corruption, reinforcing the persistence of taking advantage of charac-

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[37] Critics claim that series became "protagonists of the cultural debate" nowadays since the format was the one that best accompanied the changes in the habits of viewers. Cf. encurtador.com.br/vHOQU. Accessed on: Dec. 16, 2018.

[38] Carried out by Globo in 1979, from the premiere of three series with the proposal of presenting "an overview of Brazil": *Carga Pesada*, centered on two truckers and revealing a "rural Brazil"; *Malu Mulher*, bringing the feminine (and feminist) issue; and *Plantão de Polícia*, approaching police news.

teristics of the American dramatic model – reference in short stories –, as well as seeking an original path grounded in social, cultural and aesthetic dynamics of Brazil, already successful with the *telenovela*.

5.2. Social themes and criticism highlighted at 7 p.m.

A family aboard a sinking ship ends up frozen at the bottom of the Atlantic and is brought back to life more than a century later. The science fiction premise could give a futuristic tone to *O Tempo Não Para* (Globo), however, it is the only characteristic unrelated to reality in the *telenovela*. Adept to the characteristic humor of the 7 p.m. time slot, the production uses its "out of time" characters to discuss delicate subjects, propose discussions and make open social criticisms.

"The merger of the public and private domains carried out by *telenovelas* allows them to synthesize broad problems and specific figures and plots and, at the same time, suggest that personal and specific dramas may have a broader meaning" (Lopes, 2009: 28). This public-private dichotomy is evident all the time. *O Tempo Não Para* discussed women's emancipation, divorce, racism, homophobia, trafficking, corruption, etc., approached from the temporal estrangement. While also problematizing the prejudice that still exists, it dealt with racism in a historical way, from the abolition.

5.3. Black representativeness in the Brazilian *telenovela*

Black representativeness in the Brazilian *telenovela* was a relevant theme in 2018. *Segundo Sol*, *O Tempo Não Para* and *As Aventuras de Poliana* (SBT) mobilized discussions[39] about the lack of black visibility, racism in childhood, and the place of black people in Brazil.

According to IBGE[40], 54% of the Brazilian population is considered black or brown. Television representativeness, however, is

[39] Cf. encurtador.com.br/ptyE7. Accessed on: Jan. 29, 2019.
[40] Cf. encurtador.com.br/kloDM. Accessed on: Dec. 17, 2018.

still insufficient. This year, the discussion reached the apex after the announcement of the 9 p.m. *telenovela Segundo Sol*, which draw attention due to the lack of black actors. In the city of Salvador, where the story takes place, 80% of the population is black or brown, but the central nucleus was formed mostly by white actors.

Regarding the place of black people in Brazilian society, the narrative of *O Tempo Não Para* showed that there were few socio-economic transformations lived by black people after the abolition, in 1888. In *As Aventuras de Poliana*, a dialogue between the school coordinator and a student was subject of criticism by social movements. In the scene, the girl is asked about the disappearance of a work of art. The student vents off, saying that, if she were white, she would not be questioned regarding it. The coordinator, also black, normalizes her speech, emphasizing that this thought is a way to victimize of black individuals.

Considering that social representation is based on the society and individuals, and that it arises from the social relations seized from everyday life (Moscovici, 2015), the integration of black people into the media, especially on TV, is still incipient. Names such as Lázaro Ramos and Taís Araújo emerged as referential of blackness, but few are the revelations of black artists. In this way, the *telenovela* takes care of “the absorption, redevelopment and retransmission of a collective imaginary active in social representations” (Sodré, 1999: 244).

6. Theme of the year: television distribution models by the internet: actors, technologies, strategies

The organization of the audiovisual market promoted a new communicational ecosystem, causing transformations in the paradigms of infrastructure, narratives, institutionalities, sociabilities, sensitivities, and new technicalities (Martín-Barbero, 2009). That is, it altered the form of production, distribution and consumption of television and generated new demands and challenges.

In this scenario, we address points concerning the VoD infrastructure in Brazil, focusing on the recognition of these networks, as well as of the participants who compose the industrial and economic sectors. However, we emphasize the difficulty of obtaining such information, due to its opacity and, paradoxically, its invisibility, in view of the relative novelty and fluidity of the sector and the fact that communication companies do not disclose data from this universe. Ancine, due to the lack of regulation, does not oblige providers to supply institutional information.[41]

In this perspective, we present a preliminary map of the VoD sector in Brazil, which, as we have already mentioned[42], has 78 platforms. We approach the delimitation of its characteristics and analyze the television fictions of the two most important streaming services in the country: Netflix and Globoplay.[43] The first is an American provider of worldwide penetration with entry into Brazil in 2011[44]; and the second, a national service launched in 2015, part of Grupo Globo.

Since 2010, VoD in Brazil drives the flow of content and transformations of watching habits[45], keeping viewers free to choose among several productions from a catalog and the consequent dynamization of this ecosystem. With the growth of broadband and investment incentives, the country is considered the eighth largest VoD market in the world. However, this is the main form of watching fiction for only 8% of the population.[46]

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[41] According to an e-mail query.
[42] See the topic "VoD monitoring in 2018".
[43] Cf. http://bit.ly/2CdEkdL.
[44] Founded in 1997, Netflix is present in 190 countries, available in 27 languages and counts with 139 million of subscribers. Cf. https://www1.folha.uol.com.br/colunas/mauriciostycer/2019/03. Accessed in: Mar. 2019.
[45] In 2014, Brazil had 25 VoD services. In 2018, it reached 78, according to Ancine.
[46] Cf. http://bit.ly/2n1AhJs.

VoD fictions

In 2018, we had 20 original Brazilian productions for VoD.[47] The second season of *3%*, of Netflix, for example, reiterated its receptivity in the country and abroad, and Globoplay brought the comedy *Além da Ilha* only to subscribers, as well as the drama *Assédio*. The Brazilian viewer tends to consume national products, which stimulates growth and interest in local production.[48]

We selected four of the VoD fictions, representing the two main platforms: the foreign Netflix and the Brazilian Globoplay, both for representativeness and for the audience in the country. From the first, we took the Brazilian *O Mecanismo* and the Spanish *La Casa de Papel*; from the second, *Onde Nascem os Fortes*, with a VoD premiere one week before TV, and *Ilha de Ferro*, produced for the streaming service.

O Mecanismo (Netflix)

The police and political series *O Mecanismo*, of Netflix, by José Padilha and Elena Soarez, was controversial. In order to bring to the fiction the operation Lava Jato[49], it was considered elusive for representing political events in a misrepresented manner in a presidential election year.[50] With eight episodes in the first season, it was developed by Zazen Productions and had almost 30 million impressions and 200 thousand posts on Twitter.[51]

The production had provocative dissemination actions, such as the opening of "corruption stores" in booths at the airports of Brasília and São Paulo, offering products such as covers for electronic an-

[47] Cf. http://bit.ly/2CcRQy2.
[48] Cf. Erik Barmack, Netflix vice-president of international content. http://glo.bo/2HgfPAX.
[49] Federal Police program, created in 2014, to investigate corruption, bribery and money laundering actions, which led to the arrest of a number of Brazilian businessmen and politicians.
[50] Cf. http://bit.ly/2TrurE2.
[51] Cf. Kantar Ibope Media.

klets and briefs with pockets for money.[52] Also, in Brasília, a panel with a "corruptmeter" was installed, which showed the taxpayer's money consumed by corruption in real time.

La Casa de Papel (Netflix)

The Spanish drama series *La Casa de Papel*, by Álex Pina, was originally a miniseries of the open channel Antena 3 – divided into two parts. The production was made available on VoD in Brazil in April 2018 with a new edition: the 13 original chapters were transformed into 22 episodes, divided into two seasons.

Centered on the theft of the Spanish National Mint, in which eight criminals are recruited for the theft of 2 billion euros, the success of the series in the country was demonstrated by the amount of tweets and impressions in that network: over 120 million impressions and more than 1 million posts. In addition, the song symbol of the fight against fascism in Italy, *Bella Ciao*, became a hit thanks to the series and, in Brazil, the funk version evidenced its symbolic insertion into Brazilian culture.

The plot presents a narrative crafted with agility in the plot twists and instigating hooks, which boost the binge watching, as well as the tension concerning the unfolding of the plan. To date, it is the most watched non-English language series on Netflix.

Onde Nascem os Fortes (Globoplay)

Onde Nascem os Fortes, Brazilian superseries of Globo, was exhibited with all its 53 chapters in open TV between April and July 2018, but premiered in Globoplay a week earlier, on April 16. The strategy of making the premiere in streaming has been used by the station to leverage the VoD service.

Announced as a superseries[53], it had TV advertisements with video editing, displaying striking and poetic images without dia-

[52] Cf. http://youtu.be/uIirM2qBN94.
[53] A shorter *telenovela* with themes considered strong, with crime and sex scenes.

logues. The story mixes vengeance, forgiveness, hatred and love. It is based on the logic of the power relations of a small town in the northeastern hinterlands, where the law of the strongest still reigns, following the saga of a mother and her daughter in search of their son and brother, disappeared after an argument with a local entrepreneur.

The narrative was twice awarded by the Associação Paulista de Críticos de Arte (APCA)[54] and had great acceptance of critics, but the audience oscillated and the product is not among the ten most watched titles of the year. It was on the internet that it drew the most attention. The final episode, with brutal resolutions, was among Twitter's trending topics.[55]

***Ilha de Ferro* (Globoplay)**

The dramatic series *Ilha de Ferro*, by Max Mallmann and Adriana Lunardi, was produced by Globo and exhibited at Globoplay in November 2018. However, it had a special exhibition of the pilot episode at prime time of open TV.

With 12 episodes, *Ilha de Ferro* tells the story of challenges and intrigues experienced by the workers of an oil rig that have two lives: one on the high sea, confined in the "iron island" (*ilha de ferro*), and another on land. It focuses on the life of the site coordinator, who dreams of becoming manager, but who is surprised by the arrival of a new boss. The series presents a heavy plot, with scenes containing violence, sex, nudity and licit drugs. The movements of the cameras, the dark scenes and the soundtrack, composed mostly of rock songs, give agility and dynamism to the narrative.

Tension and a certain mystery of the narrative arouse curiosity, stimulating the binge watching. Thus, it fulfils its proposal of insertion in the logic of VoD, since the practice of making marathons is a common characteristic of the audience on these platforms. The first

[54] Cf. http://bit.ly/2H9fbFg.
[55] Cf. http://bit.ly/2J1Hszh.

season will be aired on open TV in 2019 and the second is already confirmed.

Final considerations

Adopting the concept of "television distributed by the internet" (Lotz, 2017), we noticed that in Brazil the VoD services present varied forms of offer, such as: (a) service with free access, with advertisements; (b) monthly subscription, with paid access; (c) rent or sale of specific content, access to services linked to pay TV (catch-up TV); (d) combination of these models, called hybrids.

Almost a decade after implementation in the country, television distributed by the internet continues to demand new formats of content and business models, as well as adequacy to context. These are new settings concerning "territory, market, nation, and signal area" (Lobato, 2019: 15), which focus on rigid structures; they are patterns that appropriate and demand new perceptions for the current dynamics. That being said, we understand that the participants of this game of demands integrate an "economy of attention, in which the look is one of the most coveted goods" (Santaella, 2010: 301).

The structural forces that permeate VoD enable the creation of a chain of relationship with the public, which begins with access, content, convenience, connectivity, mobility, quality, price and, ultimately, with the creation of a habit.

When Scolari (2017: 167) deals with the work *From Media to Mediations*, by Jesus Martín-Barbero, he says that the project behind the book is to interpret the mass consumption of cinema, radio and TV, inserted in popular everyday life, which would explode "the asepsis of the traditional scientific discourse". The work represents a major step in Latin American studies. Nowadays, when the mediations called technicalities by Martín-Barbero lead to such great structural rearrangements, it becomes fundamental to (re)observe the positions, struggles and characteristics of Brazilian television fiction distributed by – and produced for – VoD platforms, applications and systems.

Thinking production, distribution or consumption of VoD requires to concern about the very concept of VoD – which can vary according to the geolocation of those who produce, sell or consume it. Also, it concerns about possible terminologies to indicate this mode of TV management, to the understanding that the advancement of television services distributed on the internet does not mean that other modes of distribution will be extinguished. It is more coherent to think, warn Lotz, Lobato and Thomas (2018), in "layers" that overlap, i.e., different ways of handling television, which are hybridized and adjusted, forming new modes, together and mixed. To think of television as an opponent battling against the new and powerful internet, warns Miller (2009, p. 22), is foolish. Effectively, internet-distributed television expands the TV ecosystem, and it is more reasonable to think of VoD as a layer on top of several existing ones and with interaction among them.

However, new technologies and digital services are immersed in a context still poorly regulated from a legal and political standpoint. The pressure of the great representatives of broadcasting on the Brazilian government focused on "regulatory symmetry with internet companies"[56] explains the instability of the scenario, consisting of a struggle of forces in which governments would force their will concerning the theme of regulation.

Issues related to interfaces and experiences are the main reason for the adoption of VoD by the viewer, not the content itself. With a deeper look, it reveals new practices of the audience, such as researching, navigating, rolling, sliding, recommending, liking, and practicing binge watching.

In conclusion, we would say that, in the new internet-distributed television industry, the multinational Netflix occupies the most appreciable position. However, this centrality conveys a restrictive view of our media ecosystem, almost as if Netflix were the only

[56] Cf. http://bit.ly/2HkVvxr.

platform available. Despite this concentration, it is necessary to note the great diversity of platforms and other OTT media services. We should remember that broadcast stations are still in operation and can combine streaming with internal productions. There is a need for studies like these from Obitel, which ask themselves about the local media industries and the different strategies to ensure (or preserve) their position in the new scenario. Additionally, in this multiplatform era, industrial practices are as varied as the consumption and visualization habits adopted by the viewers. We are still at the beginning of studies focused on frameworks that help us explain and talk about television amid so many industrial and consumer practices.

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3

Chile: the slow agony of open television[1]

Authors[2]:
Pablo Julio, Constanza Mujica, Valentina Proust,
Francisco J. Fernández
Team:
Ángela Godoy

1. Chile's audiovisual context in 2018

Any description of the 2018 Chilean television scenario would be very similar to the one made in 2017: there was no surprise or abrupt change, neither positive nor negative. The indicators are similar, albeit a little worse than the previous year: the audience of open television was slightly lower, the one of pay television, not so slightly lower; advertising revenues were slightly lower; public funds, not so slightly lower; the profits of the only channel that does not lose money, slightly lower; the number of channels' employees, slightly less; the amount of fiction and information on the screen, slightly less (giving up space to genres cheaper to produce); the number of national fiction titles and formats, slightly less. Regarding the latter, a positive aspect stands out: after the 2014 Turkish irruption and the great crisis of TVN's dramatic area, Chilean national fiction seems to be recovering the audience's preference, the one it had always had prior to these events.

This slow but persistent setback shown by television in Chile is far from meaning that Chileans consume less audiovisual content.

[1] The authors wish to thank Kantar Ibope Media Chile, a company that makes this work possible through its invaluable collaboration.
[2] Pablo Julio, Constanza Mujica and Francisco Fernández are associate professors at the Faculty of Communications of the Pontificia Universidad Católica de Chile. Valentina Proust and Ángela Godoy are research assistants at the same faculty.

Data traffic grows steadily and 38% come from videos, watched on different platforms. Chileans consume more audiovisual content today than in the past. They just do it less and less in television. This is the new context to which the industry must adapt.

1.1. Open TV in Chile

Chart 1. Open TV national stations

Private channels (6)	Public channels (1)
Canal 13: Luksic group Chilevisión: Time Warner, through Turner Broadcasting System La Red: Grupo Albavisión Mega: Grupo Bethia (72.5%), Discovery Communications (27.5%) Telecanal: Belongs to Inversiones Alfa Tres (linked to Albavisión) TV+: Media 23 SpA (90%), P. Universidad Católica de Valparaíso (10%)	TVN, exclusively advertising-funded
Total number of channels: 7	

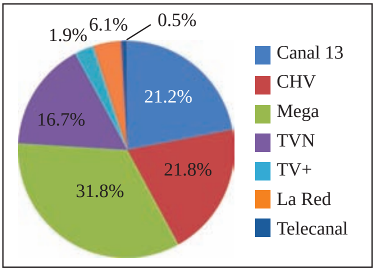
Source: Obitel Chile

The year 2018 was the fifth year of crisis in Chilean television. Except for Mega, all channels had huge losses during this quinquennium, which involved changes of ownership, capital contributions or even rescue demands for the public channel. During this period, TVN had losses of almost US$ 100 million; Canal 13, of nearly US$ 75 million; and CHV, of more than US$ 50 million.

Open television was developed in a different environment than the current one. The crisis it faces around the world requires great transformation efforts, but the short-term concerns of Chilean television seem too challenging, hindering its ability to look beyond them. For the time being, efforts are focused on cost rationalization, outsourcing of functions, hiring actors only by project and other similar actions to reduce costs, while the public is increasingly distracted by other type of screens.

Graph 1. TV rating and share per channel during 2018 [3]

Channel	Household rating (%)	Total TV share (%)	Share in open TV (%)
Canal 13	5.1	13.0	21.2
CHV	5.3	13.4	21.8
Mega	7.7	19.6	31.8
TVN	4.1	10.3	16.7
TV+	0.5	1.2	1.9
La Red	1.5	3.7	6.1
Telecanal	0.1	0.3	0.5
Total open TV	24.2	61.6	-
Total pay TV	15.1	38.4	-
Total pay and open TV	39.3	100.0	100.0

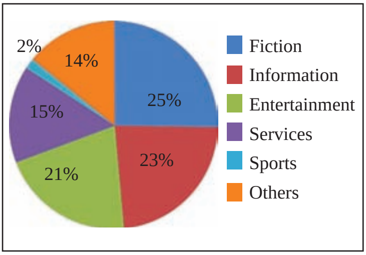


Source: Kantar Ibope Media Chile – Obitel Chile

Although Mega had a fall of almost 9% compared to its 2017 household rating – the highest fall in absolute terms of all the channels –, it still has an advantage of more than 45% regarding its closest competitor. In the other channels, the audience results were very similar to those of the previous years, showing stability in a general situation of regression. On the other hand, the audience of pay television shows a decline for the third consecutive year, totaling a fall of 14.2% from its highest point in 2015.

Graph 2. Genres and hours in TV programming during 2018

Broadcasted genres	Broadcasted hours [4]	Time %	Audience %
Fiction	13449:55	25.4%	37.9%
Information	12275:45	23.1%	30.1%
Entertainment	11002:55	20.7%	8.3%
Services	7932:10	15.0%	8.9%



[3] Household rating calculated on a 24-hour-a-day basis, regardless of the channel's transmission schedules.

[4] For presentation purposes, the times on this and the following tables are rounded to five minutes.

Sports	842:35	1.6%	2.2%
Others	7530:20	14.2%	12.7%
Total	53033:40	100%	100%

Source: Kantar Ibope Media Chile – Obitel Chile

Both fiction and information, genres that have historically dominated the screen, fell in terms of audience and time in 2018. During this year, although entertainment programs had more screen time, the audience participation they achieved was still much lower than that of the two main genres. However, the ratio of audience participation over time participation increased, which is explained by the fact that the decrease in exhibition hours affects the low audience hours more.

1.2 Pay TV

Pay TV ended 2018 with fewer subscribers than it had in January. The figures vary marginally each month and some were higher than in January, but the tendency is clear: it seems to have reached its ceiling and, perhaps, a gradual decline has begun, as already observed in some developed countries.[5] Even though there are no reliable figures to claim this, an important part of the explanation must be sought in the penetration of VoD services, which has been slowed down since the dominant pay TV providers usually also provide internet access for households, necessary to access VoD without the limitations of mobile connections, and 87% of data traffic come from fixed connections (Subtel, 2018). On the other hand, all those companies are pushing their own VoD services.

1.3. Advertising investments of the year: in TV and in fiction

According to the Association of Media Agencies, in 2018 advertising investment in television continued its downward trend. It

[5] Data from Subtel. Retrieved in December 2018 from https://www.subtel.gob.cl/estudios-y-estadisticas/television/.

fell 2% in the case of open television and 11% in the case of pay television (AAM, 2018). Fiction production in Chile is completely based on open television, so the important drop in pay TV does not affect it directly, but both figures show the decline of an industry that is falling in a growing country, where less television is watched while the audiovisual consumption time grows.

1.4. Merchandising and social merchandising

In 2017, *La Colombiana* seemed to break with the usual disconnection of national fiction regarding the promotion of social causes by addressing the issue of immigration. The year 2018 has examples of something different than the trend of including a campaign as an accessory motive to the central plot. *Casa de Muñecos* gave visibility to two issues not usually addressed in national fiction: hidden homosexuality and Alzheimer's disease; *Wena Profe*, to eclectic teaching; *Tranquilo Papá*, to consumerism and materialism; and *La Reina de Franklin*, to immigration and racial inclusion.

1.5. Communication policies

Two situations cross the space of public policies regarding television: the implementation of digital television and promotion policies.

For 20 years now, Chile has been moving, very slowly, towards the implementation of digital terrestrial television; so slowly that many people wonder what it can offer to citizens that is not already available by other means. The last formal milestone was in 2015, with the enactment of the regulation that made operational the 2014 Law n. 20,750, on Digital TV, and established the analog blackout for April 2020. Although the work schedule has been advancing, the channels declare that they are not able to face the process and formally raised a request to the authority to postpone the analog blackout until 2025. Meanwhile, 64% of the population declares not knowing what digital television is (CNTV, 2018).

The second point refers to the competitive fund of the National Television Council, the main support to produce quality programs, particularly in a scenario of budget restriction in open television. Almost all series and miniseries released in recent years have been beneficiaries of it. Thus, the fact that – in a context of 3.2% growth of public spending – the 2019 CNTV fund budget fell by a nominal 27% compared to the previous year, totaling around US$ 4.7 million, was so hard for the audiovisual sector. In absolute terms it is not a high value. It is close to 1% of the advertising budget of Chilean television. But it is the difference that allows many productions to exist. Given the projects' maturation time, the effect will not be seen on the screens in 2019, but in the following years.

1.6. Digital and mobile connectivity infrastructure

The challenge faced by open and paid television against VoD is that the adoption of the latter is facilitated by the connectivity advances that Chile has had in recent years. In terms of 3G and 4G mobile connections, those relevant to video traffic, as of December 2018, the Under-Secretariat of Telecommunications (Subtel) estimated the number at 95.7 per 100 inhabitants, with a growth of 9% over the previous year.[6] This does not mean that 95.7% of the population can freely watch VoD on their broadband-connected smartphone. In that number there are users' duplications, uses other than telephony for connections and, most importantly, costs and limits in data traffic. However, all these barriers tend to diminish.

Regarding fixed connections to residential internet, the one relevant for the consumption of VoD in households, as of December 2018 Subtel estimated them at 2,850 million in a universe of 6.5 million homes, according to the 2017 census. This base of 44% connected households, growing at 5% per year, is the entry platform for VoD to households – 35% of which have a smartTV – and the television's direct competition, since mobile access is especially significant outside the home, where open or pay television do not compete.

[6] Subtel's statistical series on internet connections are available at https://www.subtel.gob.cl/estudios-y-estadisticas/internet/.

1.7. Independent production companies

The year 2018 was defined by Canal 13's path towards the outsourcing of its contents. Except for the press department, almost all the production functions have been transferred to the Spanish company Secuoya and the national production company Fábula. In an unusual way, independent production enters the scene not to sell content, but to manage the channel itself.

In the more traditional way of understanding independent production, while the market of series and miniseries is disputed by multiple producers, a single production company has become the dominant one in the *telenovela* market. All *telenovelas* produced externally for Mega and Canal 13 in 2018 were made by AGTV, directed by Pablo Ávila, a former TVN executive producer who, adding his experience in the channel and as an independent, has produced 27 *telenovelas*.

Beyond fiction, independent production has begun to enter into open television spaces that it had never entered before: newscasts. The downsizing of the press teams and the search to lower costs have led some channels to explore the outsourcing of reportages.

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

Table 1. Fiction broadcasted in 2018 (national and foreign; co-productions; premiere and reprises)

PREMIERE NATIONAL TITLES – 17 **Canal 13** 1. *La Reina de Franklin* (*telenovela*) 2. *Pacto de Sangre* (*telenovela*) 3. *Soltera Otra Vez 3* (*telenovela*) **CHV** 4. *Lo que Callamos las Mujeres* (*unitario*) 5. *Mary & Mike* (miniseries) **Mega** 6. *Casa de Muñecos* (*telenovela*)	**PREMIERE OBITEL CO-PRODUCTIONS – 1** **TVN** 1. *Bichos Raros* (series – Obitel co-production) **REPRISES – NATIONAL TITLES – 11** **Canal 13** 1. *No, la Serie* (miniseries) **CHV** 2. *Buscando a María* (*telenovela*)

7. *Isla Paraíso* (*telenovela*) 8. *La Cacería* (series) 9. *Martín, el Hombre y la Leyenda* (miniseries) 10. *Perdona Nuestros Pecados* (*telenovela*) 11. *Si Yo Fuera Rico* (*telenovela*) 12. *Tranquilo Papá* (*telenovela*) 13. *Verdades Ocultas* (*telenovela*) **TVN** 14. *Casa de Angelis* (series) 15. *Dime Quién Fue* (*telenovela*) 16. *Ramona* (series) 17. *Wena Profe* (*telenovela*) **PREMIERE FOREIGN TITLES – 19** **Canal 13** 1. *Sandro de América* (series – Argentina) 2. *Somos Tu Voz Vidas de Mujeres* (series – Colombia) 3. *Francisco el Jesuita* (miniseries – US-Hispanic) **CHV** 4. *Rico y Lázaro* (*telenovela* – Brazil) **Mega** 5. *A Través del Tiempo* (*telenovela* – Brazil) 6. *Querer Sin Límites* (*telenovela* – Brazil) 7. *Sombras del Ayer* (*telenovela* – Brazil) 8. *Totalmente Diva* (*telenovela* – Brazil) **TVN** 9. *Josué la Tierra Prometida* (*telenovela* – Brazil) 10. *Altagracia* (*telenovela* – Mexico) **La Red** 11. *Como Dice el Dicho* (unitary – Mexico) 12. *El Vuelo de la Victoria* (*telenovela* – Mexico) 13. *Enamorándome de Ramón* (*telenovela* – Mexico) 14. *Hijas de la Luna* (*telenovela* – Mexico) 15. *La Rosa de Guadalupe* (series – Mexico)	3. *Cartas de Mujer* (unitary) 4. *Casado con Hijos* (sitcom) 5. *Lo que Callamos las Mujeres* (unitary) 6. *Vidas en Riesgo* (docudrama) **TVN** 7. *El Vuelo del Poeta* (TV movie) 8. *La Gabriela* (TV movie) 9. *Teresa* (TV movie) **TV+** 10. *Familia Moderna* (series) 11. *Los Años Dorados* (sitcom) **REPRISES – FOREIGN TITLES – 17** **Canal 13** 1. *Chocolate con Pimienta* (*telenovela* – Brazil) 2. *Señora del Destino* (*telenovela* – Brazil) 3. *Yo Soy Betty, la Fea* (*telenovela* – Colombia) **Mega** 4. *Avenida Brasil* (*telenovela* – Brazil) **TVN** 5. *Los Milagros de Jesús* (series – US-Hispanic) 6. *Pasión de Gavilanes* (*telenovela* – Colombia) 7. *Soy Tu Dueña* (*telenovela* – Mexico) **TV+** 8. *Águila Roja* (series – Spain) 9. *Cuenta Atrás* (series – Spain) **La Red** 10. *Águila Roja* (series – Spain) 11. *El Chapulín Colorado* (sitcom – Mexico) 12. *Mujer Casos de la Vida Real* (docudrama – Mexico) **Telecanal** 13. *Impostores* (series – Argentina) 14. *Comando Elite* (series – Colombia) 15. *Pedro el Escamoso* (*telenovela* – Colombia) 16. *Sin Retorno* (series – Colombia)

16. *Mi Marido Tiene Familia* (*telenovela* – Mexico) 17. *Sin Tu Mirada* (*telenovela* – Mexico) 18. *Y Mañana Será Otro Día... Mejor* (*telenovela* – Mexico) **Telecanal** 19. *Todas Odian a Bermúdez* (*telenovela* – Colombia)	17. *Chespirito* (sitcom – Mexico) **TOTAL PREMIERE TITLES: 37** **TOTAL REPRISE TITLES: 28** **TOTAL BROADCASTED TITLES: 65**

Source: Kantar Ibope Media Chile – Obitel Chile

The list of titles in Table 1 does not allow to fully understand the phenomenon of television fiction. Although fiction of North American or European origin occupies a marginal role in open television, Turkish fiction is programmed and consumed in the same way as Ibero-American fiction. In 2018, 13 premiere titles of Turkish origin were broadcasted, distributed among four open television channels.

During the last five years there has been a consistent tendency: a continuous decrease in the amount of national titles. Premiere titles have fallen from 28 in 2014 to 17 in 2018. Some of this decline is explained by the decrease in the diversity of formats, since *telenovelas*, for example, can concentrate many hours of broadcasting in a few titles, unlike what happens with TV movies. However, the number of national *telenovelas* has also decreased, from 17 in 2014 to 11 in 2018. The other tendency that remains is the decline of Ibero-American productions, which fell from 46 in 2014 to 20 in 2018. That place has been taken by Turkish productions; this is no longer a transitory disruption, but a consolidated phenomenon.

Table 2. Premiere fiction in 2018: countries of origin

Country	Titles	%	Chapters/ episodes	%	Hours	%
NATIONAL (total)	17	45.9	1.216	48.5	722:00	41.4
OBITEL COUNTRIES (total)	20	54.1	1.289	51.5	1020:55	58.6
Argentina	1	2.7	13	0.5	9:35	0.5
Brazil	6	16.2	363	14.5	298:45	17.1
Chile	17	45.9	1.216	48.5	722:00	41.4

Colombia	2	5.4	93	3.7	65:50	3.8
Ecuador	0	0.0	0	0.0	0:00	0.0
Spain	0	0.0	0	0.0	0:00	0.0
USA Hispanic	1	2.7	2	0.1	2:15	0.1
Mexico	9	24.3	805	32.1	635:10	36.4
Peru	0	0.0	0	0.0	0:00	0.0
Portugal	0	0.0	0	0.0	0:00	0.0
Uruguay	0	0.0	0	0.0	0:00	0.0
Venezuela	0	0.0	0	0.0	0:00	0.0
CO-PRODUCTIONS (total)	1	2.7	13	0.5	9:20	0.5
National co-productions	0	0.0	0	0.0	0:00	0.0
Obitel countries co-productions	1	2.7	13	0.5	9:20	0.5
TOTAL	37	100.0	2.505	100.0	1742:55	100.0

Source: Kantar Ibope Media Chile – Obitel Chile

To better understand the context of Table 2, it is useful to consider the data of the Turkish production premiered in Chile in 2018: 13 titles, 1,446 episodes and 1,219 hours broadcasted. Considering it along with national and Ibero-American production, Turkish production represents 26% of the titles, 37% of the episodes and 41% of the broadcasted hours. Using information not contained in Table 2, it is possible to illustrate the importance of Turkish productions: the audience that it captures is 2.4 times that of all non-Chilean Ibero-American production.[7]

Regarding Obitel, Table 2 shows an overview of the origin of the fiction, relatively stable compared to the previous year. Mexico went from eight to nine titles; Brazil, from five to six; and Colombia, from three to two. Significant downward changes occurred between 2016 and 2017, but there are no surprises in 2018, which seems to suggest that a new balance has been reached, after years of strong transformations.

There is a second sign of the decline of Ibero-American fiction on the screens of Chile's open television: in time slots. National fic-

[7] Estimated as the average audience of the episodes, weighted by their duration.

tion has always been privileged in the programming grid. That has not changed, but it has deepened. In 2016, 42% of the episodes of Chilean fiction were scheduled at prime time (8pm to 11.59pm); in 2017, it was 61% and in 2018 it reached 69%. In the same period, the percentage of Ibero-American episodes scheduled in prime time was 24% in 2016 and 2017, with a fall to 15% in 2018, only comparable with the 13.7% of 2014, the year of the great Turkish irruption.

Table 3, regarding the formats of television fiction, shows an ongoing tendency: the reduction in the diversity of formats. Ibero-American sitcoms and docudramas seem to be in retreat. In 2017, only one docudrama was broadcasted and in 2018, none. Also, in both years no sitcom was broadcasted. The case of TV movies deserves a separate analysis. Although there is none, the concept itself becomes blurred in the presence of large productions in digital VoD platforms. To a large extent, TV movies have been defined as opposed to theater films, but tacitly implying a definition of production standards. However, when Netflix, Amazon and others begin to produce high-standard films that will never be broadcasted in a theater, that tacit definition is shattered and only the exhibition attribute remains, which is independent of the work and often accidental.

Table 3. Formats of national and Ibero-American fiction

Format	National						Ibero-American					
	Titles	%	Titles	%	Titles	%	Titles	%	Titles	%	Titles	%
Telenovela	11	64.7	1.079	88.7	615:10	85.2	14	70.0	785	60.9	670:25	65.7
Series	3	17.6	18	1.5	13:55	1.9	3	15.0	39	3.0	29:00	2.8
Miniseries	2	11.8	9	0.7	8:15	1.1	1	5.0	2	0.2	2:15	0.2
TV movie	0	0.0	0	0.0	0:00	0.0	0	0.0	0	0.0	0:00	0.0
Unitary	1	5.9	110	9.0	84:40	11.7	2	10.0	463	35.9	319:10	31.3
Docudrama	0	0.0	0	0.0	0:00	0.0	0	0.0	0	0.0	0:00	0.0
Others	0	0.0	0	0.0	0:00	0.0	0	0.0	0	0.0	0:00	0.0
Total	17	100.0	1.216	100.0	722:00	100.0	20	100.0	1.289	100.0	1020:55	100.0

Source: Kantar Ibope Media Chile – Obitel Chile

On the other hand, although there has been a decrease in the diversity of formats, the national fiction broadcasted during 2018 shows an unusual temporal dispersion in national fiction: of the 17 titles, eight are set at a different time than the present.

Table 3 also shows a classic feature of Ibero-American fiction: the relevance of *telenovela*. Measured as a proportion of screen time, the *telenovela* represents 74% of fiction time. Of that, 48% are national and the remaining 52% are Ibero-American.

Comparing the data in Table 3 with its equivalent of five years ago, on average Chilean *telenovela*s now have more episodes and Ibero-American, less, while the duration of the episodes remains constant. In the Chilean case, it is not applicable to all productions, but only to some titles with durations far superior to those usual in previous years. The most emblematic case was the production that led the 2018 and 2017 top ten, with more than 300 episodes, but it has been largely surpassed by *Verdades Ocultas*, which began to be broadcasted in 2017 and continues, until the end of this report, surpassing the 430 episodes.[8]

Table 4. The ten most watched titles

Title		Origin of the idea or script	Channel	Format/ genre	N. of chap./ ep. in 2018	Time slot	Rating	Share
1	*Perdona Nuestros Pecados*	Chile	Mega*	*Telenovela*/ drama	152**	Prime time	26.3	40.0
2	*Casa de Muñecos*	Chile	Mega*	*Telenovela*/ comedy	78**	Prime time	21.7	32.3
3	*Isla Paraíso*	Chile	Mega*	*Telenovela*/ comedy	62**	Prime time	21.6	37.0
4	*Verdades Ocultas*	Chile	Mega*	*Telenovela*/ melodrama	261**	After-noon	20.2	42.3

[8] In both cases, the production of the *telenovelas* has different seasons. However, the broadcasting is continuous between the end of one season and the beginning of the next, so it is not a relevant distinction for the audience.

5	*Si Yo Fuera Rico*	Chile	Mega*	*Telenovela*/ comedy	175	Prime time	15.8	26.1
6	*Tranquilo Papá*	Chile	Mega*	*Telenovela*/ comedy	6**	Prime time	15.7	30.8
7	*Martín, el Hombre y la Leyenda*	Chile	Mega*	Miniseries/ biography	4	Prime time	15.5	27.7
8	*La Cacería*	Chile	Mega*	Series/ police	8	Prime time	15.2	25.3
9	*Querer Sin Límites*	Brazil	Mega	*Telenovela*/ drama	98**	Prime time	10.0	22.0
10	*Totalmente Diva*	Brazil (Ireland)	Mega	*Telenovela*/ Drama	49**	Afternoon	9.9	21.3
Total national productions:					**Foreign scripts:**			
80%					20%			

* National production. ** Its broadcasting began in 2017 or moved to 2019.

Source: Kantar Ibope Media Chile – Obitel Chile

Historically, the top ten was exclusively occupied by national productions, but it ended in 2015, with the Turkish irruption and the crisis that affected the industry, with productions from other Ibero-American countries entering the list. The year 2018 opens the possibility that the previous order is slowly being restored: eight of the top ten places, as in 2017, were national productions. The difference is that they are now the first eight places, and they remain so even considering Turkish productions, since, if they were to enter, they would only displace the Brazilian productions that occupy the ninth and tenth places.

Table 4a. The ten most watched national titles

	Title	Origin of the idea or script	Channel	Format/ genre	N. of chap./ ep. in 2018	Time slot	Rating	Share
1	*Perdona Nuestros Pecados*	Chile	Mega	*Telenovela*/ drama	152*	Prime time	26.3	40.0
2	*Casa de Muñecos*	Chile	Mega	*Telenovela*/ comedy	78*	Prime time	21.7	32.3
3	*Isla Paraíso*	Chile	Mega	*Telenovela*/ comedy	62*	Prime time	21.6	37.0

4	*Verdades Ocultas*	Chile	Mega	*Telenovela*/ melodrama	261*	After-noon	20.2	42.3
5	*Si Yo Fuera Rico*	Chile	Mega	*Telenovela*/ comedy	175	Prime time	15.8	26.1
7	*Tranquilo Papá*	Chile	Mega	*Telenovela*/ comedy	6*	Prime time	15.7	30.8
11	*Martín, el Hombre y la Leyenda*	Chile	Mega	Miniseries/ biography	4	Prime time	15.5	27.7
13	*La Cacería*	Chile	Mega	Series/ police	8	Prime time	15.2	25.3
14	*Pacto de Sangre*	Chile	Canal 13	*Telenovela*/ drama	55*	Prime time	9.7	14.6
15	*Soltera Otra Vez 3*	Chile (Argen-tina)	Canal 13	*Telenovela*/ comedy	101	Prime time	8.7	13.6
	Total national productions:				**Foreign scripts:**			
	100%				0%			

* Its broadcasting began in 2017 or moved to 2019.

Source: Kantar Ibope Media Chile – Obitel Chile

Although Table 4a incorporates channels other than Mega, which dominated 100% of the top ten, it is paradoxically a reaffirmation of its current leadership. Table 4a could not include more of Mega's national productions because it produced eight of them, reaching more than 25% of share, while the rest of the channels altogether produced nine, with results between 14 and 5 share points.

Table 5. Audience profile of the ten most watched titles: gender, age and socioeconomic status

Title		Chan-nel	Gender%		Socioeconomic status%			
			Women	Men	ABC1	C2	C3	D
1	*Perdona Nuestros Pecados*	Mega	62.8	37.2	6.0	17.3	30.5	46.2
2	*Casa de Muñecos*	Mega	67.7	32.3	6.4	14.9	31.0	47.7
3	*Isla Paraíso*	Mega	69.7	30.3	5.8	14.9	28.5	50.8
4	*Verdades Ocultas*	Mega	70.0	30.0	5.6	15.9	30.8	47.7
5	*Si Yo Fuera Rico*	Mega	62.5	37.5	6.4	15.6	32.2	45.8
6	*Tranquilo Papá*	Mega	61.3	38.7	6.2	16.3	33.9	43.6
7	*Martín, el Hombre y la Leyenda*	Mega	60.3	39.7	5.7	16.5	24.2	53.6

8	*La Cacería*	Mega	60.6	39.4	6.3	16.3	31.8	45.5
9	*Querer Sin Límites*	Mega	70.0	30.0	6.1	15.5	30.5	47.8
10	*Totalmente Diva*	Mega	65.7	34.3	6.7	16.0	34.5	42.8

Title		Age range %						
		4-12	**13-17**	**18-24**	**25-34**	**35-49**	**50-64**	**65-+**
1	*Perdona Nuestros Pecados*	6.3	3.5	8.9	15.5	25.3	24.1	16.3
2	*Casa de Muñecos*	8.0	3.7	7.4	15.6	23.7	24.4	17.2
3	*Isla Paraíso*	9.4	3.5	6.7	13.8	22.9	24.5	19.3
4	*Verdades Ocultas*	6.2	3.4	7.6	13.7	22.5	23.8	22.8
5	*Si Yo Fuera Rico*	8.8	5.1	9.2	15.2	24.4	22.6	14.8
6	*Tranquilo Papá*	7.0	3.7	8.9	13.4	23.5	25.6	17.9
7	*Martín, el Hombre y la Leyenda*	6.1	3.0	9.4	17.9	21.4	29.4	12.7
8	*La Cacería*	8.7	3.9	8.9	21.1	25.4	19.7	12.2
9	*Querer Sin Límites*	2.9	7.4	16.4	26.2	23.2	16.0	2.9
10	*Totalmente Diva*	4.3	8.3	13.1	21.9	27.4	18.4	4.3

Source: Kantar Ibope Media Chile – Obitel Chile

The programs' audience profiles – strongly defined by the time slots in which they are broadcasted – shown in Table 5 are within the usual ranges. There is a striking and consistent feature over the years: programs that refer to historical events or attribution of such (as biblical *telenovelas* of some other years) often have a slightly more male audience profile than the strictly fictional programs. This year, the representatives of that trend are *Martín, el Hombre y la Leyenda*, a biographical miniseries about a popular boxer and idol from the 1970s and 1980s, and *La Cacería*, based on a case of serial crimes occurred in the 1990s.

3. Monitoring VoD in 2018

Assessing the access to VoD services has one difficulty: the same category encompasses services with different business models. If we refer to services that require the payment of a subscription, the IX National Television Survey (CNTV, 2018) estimates that 13.9%

of households have access to one[9]; if we talk about VoD services associated with a pay TV provider, at different levels, VoD is part of the paid service; if we include YouTube, anybody with internet access is a potential user, as well as anyone with a smartphone, for that matter; i.e., more than 60% of the population. The truth is that its consumption increases. The fact that for the fifth consecutive year the television household rating decreased suggests that the displacement of audiovisual consumption is increasing.

3.1. VoD in Chile

Chart 2. VoD in Chile

	Platforms [10]	**Total[11]**
VoD linked to open television networks	**Canal 13** - Loop13: VoD of Canal 13's historical programming. http://www.13.cl/loop - Live signal and VoD of the current programming of the open signal. http://www.13.cl/programas - Canal 13i: own live production and VoD of current and historical own production. Available only outside of Chile. - General YouTube channels and programming of historical productions (REC TV). **CHV** - Live signal and VoD of current programming. VoD of current programming. https://www.youtube.com/user/chvtevedeverdad/	9

[9] The survey was conducted in 2017. The previous survey (2014) estimated that it was 2.4%, which shows rapid growth. On the other hand, GfK Adimark's study cited in section 6 of this report estimates a penetration of 35% of the population.

[10] We exclude Instagram, Facebook or other accounts not intended for programming, but for promotional videos, featured segments or uses other than fiction.

[11] To calculate the total VoD linked to open television channels, we only considered the YouTube channels explicitly mentioned and with greater reach. There are many other open channels for specific uses in different programs, with more limited reach and ephemeral life.

VoD linked to open television networks	**Mega** - Live signal and VoD of current programming. http://www.mega.cl/home/ Current programming to watch from outside of Chile. **TVN** - TVN Play: two live signals and TVN's historical programming. Available only outside of Chile. https://www.tvnplay.com/ - Live signal and VoD of the current open signal programming. https://www.tvn.cl - YouTube channels segmented by *telenovelas* and series, news, general and music.	9
VoD linked to pay channels	HBO Go, Fox Play	2
VoD linked to telecommunication companies	Claro Video, VTR Play, Movistar Play, DirecTV Go	4
VoD not linked to TV channels[12]	Netflix, Amazon Prime Video, Apple TV, YouTube Originals Audiovisual platform of the National Television Council: content developed with the support of CNTV. https://www.cntv.cl/videoteca/	5
OVERALL TOTAL		20

Source: Obitel Chile

3.2. Profits of VoD systems

Whatever the profits of VoD systems in Chile, they are likely to decrease. At least of those constituted outside of Chile. The reason is that a legal reform proposal is currently being discussed, which would end with the tax limbo that these companies have enjoyed in Chile. The reform seeks to end the differences that favor them compared to those constituted in Chile and that they pay taxes in the same way than other economic sectors. In the meantime, there is no public information about their incomes or profits. It is possible to have information about the overall results of Netflix or other com-

[12] The list of VoD services no linked to television channels or telecommunications companies is overwhelming. We included only the most popular ones, without considering those in which there is no place for television or serial fiction, such as (not an exhaustive list) services dedicated to sports (e.g., ESPN Play), documentaries (e.g., https://www.documaniatv.com/), movie theater (e.g., https://mubi.com), or even specialized in Chilean cinema (e.g., https://ondamedia.cl/).

panies, but not from Chile, where even their number of affiliates is not public information.

In the case of other types of companies, the information is equally opaque. As these are not open-stock business units separate from parent companies, the income or profit record is not publicly available.

3.3. VoD analysis in 2018: national and Ibero-American premiere fiction

Table 6 is very clear: within the categories defined in this yearbook, there is no Chilean fiction production for VoD. The only title corresponds to a small production, with an exploratory aim (360°), made in partnership with a mobile telephony company that does not produce content. However, there is a limited production of web-series (not from the channels), as well as some Instagram productions that seek to gain followers to offer them advertising contents.

Table 6. National and Ibero-American fictions broadcasted in VoD systems in 2018

National premiere titles	Ibero-American premiere titles	Co-productions
Mega (YouTube) 1. *Los Muertos También Hablan* (miniseries 360°)	**Amazon Prime Video** 1. *Pequeñas Coincidencias* (series, Spain) 2. *Diablo Guardián* (series, Mexico) 3. *Un Extraño Enemigo* (series, Mexico) **Fox Play** 1. *Llámame Bruna, T3* (series, Brazil) 2. *Río Héroes* (series, Brazil) 3. *Sitiados, T2* (series, Colombia) **Movistar Play** 1. *Arde Madrid* (series, Spain) 2. *El Día de Mañana* (series, Spain) 3. *El Embarcadero* (series, Spain) 4. *Félix* (series, Spain) 5. *Gigantes* (series, Spain) 6. *La Peste* (series, Spain)	**Amazon Prime Video** 1. *Falco* (series, US-Mexico) **Netflix** 1. *Diablero* (series, US-Mexico) 2. *El Chapo, T3* (series, US-Mexico) 3. *El Vato, T2* (series, Mexico-UK) 4. *Enemigo Íntimo* (series, US-Mexico) 5. *Ingobernable, T2* (series, US-Mexico) 6. *José José: El Príncipe…* (series, US-Mexico) 7. *La Balada de Hugo Sánchez* (series, US-Mexico) 8. *La Casa de las Flores* (series, US-Mexico)

	7. *Matar al Padre* (miniseries, Spain) 8. *Mira lo que Has Hecho* (series, Spain) 9. *Vergüenza, T2* (series, Spain) **Netflix** 1. *Edha* (series, Argentina) 2. *El Marginal, T2* (series, Argentina) 3. *Encerrados* (series, Argentina) 4. *Psiconautas, T2* (series, Argentina) 5. *3%, T2* (series, Brazil) 6. *Borges* (series, Brazil) 7. *El Mecanismo* (series, Brazil) 8. *Samantha!* (series, Brazil) 9. *Distrito Salvaje* (series, Colombia) 10. *La Ley Secreta* (series, Colombia) 11. *Élite* (series, Spain) 12. *Yo, Potro* (fake documentary, Mexico)	9. *La Casa de Papel, T2* (series, US- Spain) 10. *Las Chicas del Cable, T3* (series, US-Spain) 11. *Luis Miguel* (series, US-Mexico) 12. *Narcos: México* (series, US-Colombia) 13. *Nicky Jam: El Ganador* (series, US-Mexico) 14. *Paquita Salas* (series, US-Spain) 15. *Sin Senos Sí Hay Paraíso, T3* (series, US-Colombia) 16. *Velvet Colección* (series, US-Spain)
Total: 1	**Total: 37**	**Total:7**
OVERALL TOTAL: 45		

Source: Obitel Chile

The national fiction offer is greater than what Table 6 suggests, but there is no production premiered in VoD in the platforms analyzed. However, there is an abundance of productions made and broadcasted on television that incorporate VoD and cinema as a back window of exhibition.

As for Ibero-American production, some had a high impact on the press and social networks, such as Luis Miguel's biography, but there are no data to measure their consumption. Impact and consumption, as mentioned in the theme of the year, may not be correlated.

Table 7. Premiere fiction in VoD in 2018: countries of origin

Country	Titles	%
NATIONAL (total)	1	2.2%
OBITEL COUNTRIES (total)	44	97.8%
Argentina	4	8.9%
Brazil	6	13.3%
Chile	1	2.2%
Colombia	3	6.7%
Ecuador	0	0.0%
Spain	15	33.3%
USA (Hispanic production)	0	0.0%
Mexico	10	22.2%
Peru	0	0.0%
Portugal	0	0.0%
Uruguay	0	0.0%
Venezuela	0	0.0%
CO-PRODUCTIONS (total)	2	4.4%
Chilean co-productions	0	0.0%
Obitel countries co-productions	6	13.3%
OVERALL TOTAL	45	100.0%

Source: Obitel Chile

Spain, Mexico, Brazil and co-productions (typically with the US) are the main sources of VoD original material, but in a differentiated way. While Spain dominates Movistar+, other countries have a higher presence on Netflix.

Table 8. Formats of national and Ibero-American fiction in VOD

Formats	**National**				**Ibero-American**			
	Titles	**%**	**C/E**	**%**	**Titles**	**%**	**C/E**	**%**
Telenovela	0	0.0	0	0.0	0	0.0	0	0.0
Series	0	0.0	0	0.0	42	95.5	618	98.9
Miniseries	0	0.0	0	0.0	1	2.3	6	1.0
Unitary	0	0.0	0	0.0	0	0.0	0	0.0
Others	1	100.0	3	100.0	1	2.3	1	0.2
Total	**1**	**100.0**	**3**	**100.0**	**44**	**100.0**	**625**	**100.0**

Source: Obitel Chile

The analysis of Table 8 clearly shows that series is the dominant format in VoD. However, it can be misleading, since VoD services do not usually discriminate in a precise way the nature of their titles that, in another context, could have been classified as *telenovela*, soap opera or other formats.

4. Fiction analysis: open TV, VoD and transmedia expressions in networks

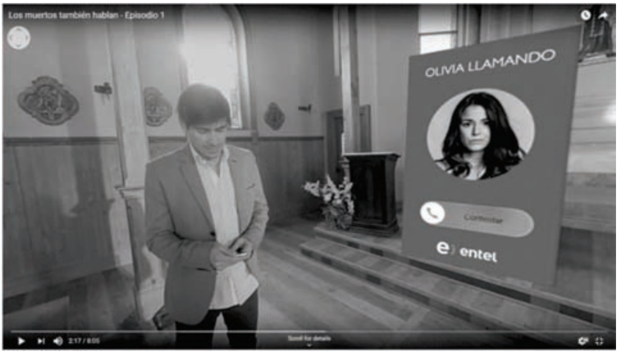
Despite being a topic frequently studied by the academia, the development of transmedia strategies has had very little development from the television industry in Chile. With few exceptions, it has been limited to actions bordering on the transmedia. Of course, multiple platforms are used to make content available to the public so they can access it during and after the television broadcast; thus, complete episodes or summaries are available on the channels' websites or on platforms such as YouTube or Facebook, but content for those platforms is rarely developed. Likewise, social networks are used to facilitate conversations among the productions' followers, creating groups on Facebook, hashtags on Twitter, or putting promotional material on Instagram, for example, but these are actions are far from constituting a transmedia narrative.

On the other hand, in those rare occasions when the actions undertaken do constitute a transmedia narration, there is usually no recognizable corporate strategy. An example is the complementary and parallel life that the protagonist of *Soltera Otra Vez* developed on Facebook. At least in its first seasons, those in which that network life reflected a greater freshness and vitality, the narrative did not respond to a deliberate decision of the television network, but it was the product of the spontaneous and voluntary initiative of the scriptwriters.

In 2018 there was a different case that reinforces the above from another angle. The title that leads the top ten this year is Mega's *Perdona Nuestros Pecados*. With 152 episodes in 2018 and 168 in 2017, divided into two seasons, this nocturnal *telenovela*, full of intrigues and secrets, was, by far, the most successful title of these two years. It takes place in a small imaginary town in an agricultural area of Chile, Villa Ruiseñor, which, in the second season, suffers the impact of the great 1960 earthquake that affected the south of the country. That is the starting point of a three-episode miniseries recorded in 360° for VoD on YouTube: *Los Muertos También Hablan*.

Los Muertos También Hablan is also set in Villa Ruiseñor, but in the current era. The protagonist is the son of a woman who lived there in the past and comes to town to solve some mysteries that he has been dragging since his birth. At first glance, *Los Muertos También Hablan* takes an unfinished storyline of *Perdona Nuestros Pecados* to create an extension of the same universe on another platform. However, the only common element is Villa Ruiseñor. There are no characters from *Perdona Nuestros Pecados* in *Los Muertos También Hablan*. In the first scenes, there is some information regarding a family that would have arrived at Villa Ruiseñor after the end of *Perdona Nuestros Pecados*; the protagonist of *Los Muertos También Hablan* would be linked to that family.

Not only the stories and characters have no relationship; the scriptwriters, the director and the rest of the production team are independent. In fact, it is not a creation of Mega's dramatic area, in charge of its fiction production. *Los Muertos También Hablan* is a co-production between Mega and Entel, one of the main telecommunications companies in Chile and the second largest provider of mobile telephony. The 360° production team is from an external company, Inmersivo VR, which has both Mega and Entel among its clients.



Entel's brand is present in the credits, in the blind spot of the 360° image and as augmented reality when the image of the protagonist's mobile phone is seen on the screen when receiving a call. This is not the first time that Mega and Entel, working with Inmersivo VR, come together to create a product with such features. In 2016, they did a similar production derived from the *telenovela Ámbar*, the 360° webseries *El Plan de Ámbar*, although on that occasion the girl after who the *telenovela* was named participated in both productions and Entel had an unavoidable presence in the contents.

What is important is that, in neither case, the 360° production was born as an attempt by the creators of the work or those responsible for the channel's fiction area to expand the narrative universe from the main screen to other screens; it was an action undertaken by the commercial division, looking to develop a business with an advertiser. Nor did the experience translate into learning about the technical challenges of 360° production, since the work was outsourced to an external specialized company. However, to question the advertising origin of these 360º productions would be myopic. Normally the initiative and funding for content experimentation derives from a commercial, advertising or content sales motivation, as can be seen in series or *telenovelas* themselves. Its success and reception by the audience consolidate ways of production that derive in a new format. Unfortunately, that does not seem to be the case. Neither the spontaneous initiatives of the scriptwriters, apart from a corporate strategy, nor the isolated actions of the commercial areas seem to consolidate in the current fiction production practices to be incorporated by the audience as transmedia reception habits.

5. Highlights of the year

In the study of Latin American melodrama, it is a common trope to distinguish between the American soap opera and the *telenovela*. In the soap opera what matters is the group. The protagonist actant is a family or a community and the individual characters have less relevance: they enter and leave, they die and revive, without a clear explanation. The *telenovela* works in the opposite way: the central axis is a protagonist triangle formed by the hero, the heroine and the female villain or false heroine.

In the soap opera, the narration takes place in a flow without closures. Their stories have no end, because they have no narrative anchoring in a single story. Hence, the sensations generated by the pathetic enunciation of melodrama are always suspended and without hope of resolution. The *telenovela* is a succession of closures: one for each chapter, one for each week and the great closure marked with the words THE END and a kiss.

Although, as we saw in the Obitel Yearbook 2016, Chilean *telenovela* has fluctuated in thematic terms, it has been loyal to the *telenovela* structures. Last year we saw a little innovation in that regard in Mega's nocturnal *telenovela Perdona Nuestros Pecados*, which had more than 300 episodes in two seasons (something new until then).

The most obvious migration towards the soap opera genre occurs in the case of Mega's daytime *telenovela Verdades Ocultas*. The story began as a classic melodrama, very much in line with TVN and Mega's daytime *telenovela*s (see Obitel Yearbooks 2016 and 2017). Due to the extreme poverty in which they live, a self-sacrificing mother must sell her youngest daughter to a businessman and his wife. Twenty years later, the girls meet again. Without knowing they are sisters, they fight for the same man. One is courageous and intelligent; the other, willful and spoiled. The mother struggles between confessing the secret that fills her with guilt and recovering her lost daughter or remaining silent.

However, this story has been lengthening (it already exceeds 400 episodes in four uninterrupted seasons) and mutating into increasingly unlikely plots. For example, one of the sisters suffers an accident and is declared dead, but after several surgeries she returns... in the body of another actress. The disappearance of several characters in 2019 has already been announced, as well as the reappearance of others and the beginning of new dramatic arcs. This *telenovela* suggests a change in Chilean *telenovela*, but also a certain continuity with previous processes such as the prevalence of melodrama with excess emotional rhetoric and lengthening motivated by commercial reasons.

On the other hand, *Pacto de Sangre* represents two interesting phenomena: the thematic and the relationship with audiences. Canal 13 premiered this nocturnal *telenovela* on September 24, 2018. It replaced the comic *telenovela Soltera Otra Vez* and represented the return of suspense melodrama to that time slot. In the Obitel Yearbook 2017 we reported that, between 2007 and 2011, suspense *telenovela*s had prevailed in audience ratings: *telenovela*s in which the love story is relegated to a secondary or tertiary level while the main axis is the challenge of discovering a murderer. There were difficult love relationships, but many of them were truncated, unresolved or irrelevant. The next period was marked by the strengthening of romantic comedy plots and classical melodrama.

Ever since *Perdona Nuestros Pecados*, the year before, a surge of mysterious plots was observed, but this became evident with *Pacto de Sangre*. It tells the story of a group of friends who accidentally kill a dancer/prostitute who they had hired for a bachelor party. From that moment, they decide to hide the crime and try to forget it, but they get involved in a spiral of drug trafficking, trafficking of adolescent women and murders. One of the friends deals with the feeling of guilt and the desire to confess. The others reveal themselves as much darker characters than one might think at first.

The *telenovela* has had moderate audience results, bordering 10 rating points, and has been consistently surpassed by the programming of other channels (contest programs and another *telenovela* with a more comic approach). However, it has become a success in social networks. On numerous occasions, it has become national trending topic on Twitter and, following the February 19, 2019 episode, the *telenovela* had seven of the national trending topics (Página 7, 2019; Publimetro, 2018; Cifuentes, 2019).

These results highlight a new challenge for the Chilean television industry: making profitable the positive perceptions of an active audience that does not watch open television. They are people who consume fiction from the channel's website, but also as secondary viewing in programs of the same station, or in content shared on social networks such as Instagram or YouTube. The channel has actively sought out these audiences by creating specific content for Instagram and Twitter (for example, a Christmas video in which everyone sings, except a character who was depressed and had tried to commit suicide the previous week), creating hashtags to make visible and agglutinate digital communities of loyal consumers.

6. Theme of the year: television distribution models by the internet: actors, technologies, strategies

According to the Under-Secretariat of Telecommunications (Subtel, 2018), the main use that Chileans give to mobile and fixed broadband corresponds to the viewing of videos, with 38% of preferences. This behavior reflects the so-called "Netflix effect", i.e., the migration of consumption of audiovisual content from traditional media (particularly open and pay television) to mobile screens. To this we can add the preference for accessing streaming and VoD platforms over the traditional television system, where consumption is linear. One of the effects of this phenomenon is reflected during the 10-11 p.m. time slot (the time with biggest TV turn-on), which shows the highest level of consumption of fixed broadband among users, while the peak demand for mobile data begins between 8 and 9 p.m., the traditional time slot of the main *telenovela*. Considering these data, we can infer that people prefer to access streaming and VoD platforms, where they can choose what content they will watch, over traditional consumption.

However, Chile has little public information about the reach and dominance of the different companies that are part of this process. Therefore, the construction of a map of television distribution models by the internet must necessarily be based on observation techniques, deriving in a descriptive analysis of what happens with the consumption of Chileans.

Table 9. Companies that offer online television content[13]

Name of the corporation/ parent company	Economic sector	Type of participation in the network infrastructure	Dominance level	Public/private/ country [5]
Netflix	Silicon Valley	Internet portal/ app	There is no clear information about the dominance level	USA
Canal 13	Mass media	Internet portal/ open TV		Private/Chile
TVN	Mass media	Internet portal/ open TV		Public/Chile
Mega	Mass media	Internet portal/ open TV		Private/Chile
CHV	Mass media	Internet portal/ open TV		Private/Chile
CNTV	State agency	Internet portal		Public/Chile
CNCA	State agency	Internet portal		Public/Chile
DirecTV	Telecommunications	Satellite TV/ app		Private/Chile
Claro TV	Telecommunications	Internet portal/ internet service providers/pay TV/app		Private/Chile
Movistar	Telecommunications	Internet portal/ internet service providers/pay TV/app		Private/Chile
VTR VOD	Telecommunications	Cloud on TV/ internet service providers/pay TV/app		Private/Chile
HBO Go	Mass media	Internet portal/ cable TV/app		USA
Amazon Prime	Silicon Valley	Internet portal/ cloud computing/app		USA
iTunes	Silicon Valley	App		USA

Source: Obitel Chile

[13] Property according to creation place of the company that operates in Chile.

On the one hand, in the telecommunications sector, internet service providers (ISPs) are divided into two groups: those who provide fixed broadband and those who provide mobile data. In the first case, among the companies with the highest penetration in Chile are VTR (35.6% of the market), Movistar (30.1%), Claro (22.2%) and Pacífico Cable (5.5%) (Subtel, 2018). All these companies were originally of Chilean capital, but over time they were acquired by international companies: Claro is controlled by a Mexican international group (Grupo Carso); VTR's sole owner is Liberty Global Inc. (based in London); on the other hand, although Movistar operates on the Chilean stock market, the Spanish company Telefónica owns 99% of the company. In the case of the companies that provide mobile data services, those that have a greater market share are Movistar (28.7% of the market), WOM (27.7%), Entel (26.5%) and Claro (6.6%). All but Entel are foreign-owned.

Table 10. Infrastructure of internet television in Chile

1) Main portals: National: Canal 13, TVN, Mega, CNCA, Claro TV, Movistar Play, VTR VoD, DirecTV On Demand. International: Netflix, Amazon Prime, HBO Go/Now, Google Play, iTunes, YouTube Premium, Play Station Store, Xbox Store/Microsoft.
2) ISPs: Fixed broadband: VTR (35.6%); Movistar (30.1%); Claro (22.2%); GTD (6.6%); Pacífico Cable (5.5%). Mobile data: Movistar (28.4%); WOM (27.7); Entel (26.5%); Claro (6.6%).
3) Content distribution networks: CDN: BaishanCloud, CDN77, CDNetworks, CDNvideo, Cloudflare, Fastly, Level 3, Limelight, Verizon, CDN DonWeb, Century Link. IXP: Claro Chile, Entel, Level3, Intercity, NAP Chile, Orange, Telefónica Mundo, PIT Chile, Tecnoera, PIT Concepción.
4) Digital intermediaries (software support): NICE/Nexidia, Ooyala, Brighcove, Amazon (AWS), Microsoft (Azure).

Source: Obitel Chile

Both the consumption of mobile and fixed broadband grew significantly in Chile during 2018: mobile data had an increase of 105% with respect to 2017, while fixed broadband grew by 40%. Therefore, within the challenges that telecommunications companies must address is maintaining the appropriate standards that allow users to consume television over the internet, in addition to preparing for the entrance of 5G to the market.

Web portals are the next level in the map of the distribution models of internet television. In Chile, we can identify the participation of companies that are part of multiple sectors. In the case of the telecommunications sector, we can find Claro TV, Movistar Play, VTR Play and DirecTV on Demand. These companies, in addition to offering cable or satellite television services, have VoD platforms that offer access to national and international audiovisual content, to join the phenomenon of internet television. These services began to be implemented during the first decade of 2000, but, with the arrival of international platforms such as Netflix, HBO Go and Amazon Prime Video, they had to develop new strategies to maintain and attract new audiences. For the time being, some of these telecommunications companies provide the possibility of accessing VoD content on mobile screens, without yet achieving the added value of global platforms, which offer original productions.

Besides telecommunications companies, traditional television channels also have a share. These use web portals as a strategy to massify their fiction content with a commercial aim – all Chilean channels use their website to replicate the analog signal in the so-called “live signal”, in addition to uploading the programs broadcasted during the day. For purposes of this report, only those channels that use their website to broadcast fiction content will be considered. The mass media sector that participates in web portals consists of Canal 13, TVN and Mega. The case of Canal 13 stands out: it not only has a website where the last chapters of its TV series are uploaded daily and a live signal, but it also developed the SVoD (subscription video on demand) platform called Loop13, dedicated exclusively to the consumption of audiovisual products. In it, we can find series, *telenovelas*, documentaries and films broadcasted in the past by Canal 13.

There is a third sector of industry participant in web portals: the State. With a public and educational aim, the National Television Council (CNTV) and the National Council for Culture and the Arts (CNCA) have free streaming platforms that work as video libraries of productions funded by the State or independent funds (Plataforma Audiovisual del CNTV and OndaMedia, respectively).

Finally, the so-called Silicon Valley sector has gained a lot of ground in the Chilean streaming market. Among the platforms currently accessible from Chilean territory are Netflix, HBO Go, Amazon Prime, Google Play, iTunes, Play Station Store, Xbox Store and YouTube Premium. These companies do not provide data regarding their penetration and dominance level in the Chilean market, so it is not possible to know with certainty whether they prevail over the local participants. Some of the data that has been collected through various studies are that 35% of Chileans are subscribed to Netflix (GfK Adimark, September 2018) and that Chile is the fifth country in the world where the platform is most frequently used (data delivered by Netflix in 2017). In addition, since March 2018, Chile no longer has the possibility to access the first free month traditionally offered by Netflix, perhaps showing that the market in this country has consolidated over the years.

Although these platforms landed in Chile after the beginning of the development of VoD in the national territory, it cannot be denied that these services have generated a transformation in the industry; thus, Chilean systems must seek new strategies to maintain their audiences' loyalty (e.g., uploading episodes of series and *telenovelas* after broadcasting them, giving access to old fiction programs that remain in the collective memory, etc.). Since these strategies were already common in television stations in other regions, such as Europe, it can be said that Chilean stations were late in adopting these tactics; this can be seen by the audience as a reaction to the arrival of Silicon Valley companies into the region, to the detriment of the image of national networks.

Finally, it is important to include in this stakeholder map the participation of two agents related to hardware and software support: content distribution networks (CDNs) (material infrastructure support) and digital intermediaries (software support). Due to the lack of public information, the identification of these actors was made based on an exploratory monitoring of the companies that perform these tasks in Chile. In the case of CDNs, these are: DN Baishan-Cloud, CDN77, CDNetworks, CDNvideo, Cloudflare, Fastly, Level 3, Limelight and Verizon. As for internet exchange points (IXPs), the second type of content distribution, we could identify the participation of Claro Chile, Entel, Level3, Intercity, NAP Chile, Orange, Telefónica Mundo, PIT Chile, Tecnoera and PIT Concepción. These IXP companies are regulated in Chile, but, despite this, a clearer dissemination of the information regarding their actions is needed. In the case of digital intermediaries, it is possible to find international companies such as Nice/Nexidia, Ooyala and Brighcove. There are no studies or reliable data on the dominance and market share of this industry; this presents a challenge for future work, which should aim to eliminate the opacity with which this information is handled and develop a clearer map, allowing to fully understand the internet television broadcasting system in Chile.

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4

Colombia: space of tension between tradition and digitalization

Authors:
Borys Bustamante Bohórquez, Fernando Aranguren Díaz,
Hernán Javier Riveros Solórzano

Team:
Diana María Lozano Prat, Zulma Velandia Velandia,
Yari Nicolás Arias Luque, Salomé Ortiz Moreno,
Nancy Paola Calderón, Flor María Francia, Jennifer Moncada,
Marisol Calixto Barón, Fernando Orjuela, Susana Celemín,
Luisa Fernanda Bedoya Osorio

1. Colombia's audiovisual context in 2018

The panorama of television fiction in 2018 in Colombia offers a scenario of tension between the digital and the traditional due, in large part, to the possibilities of internet access offered by the country and the very clear concentration of the audience in front of the traditional television and, particularly, to private channels. Thus, more than being able to speak of a broad and thick system of distribution of television by the internet in the nation, what is found is a tension between the traditional and predominant television consumption in the country compared to the appearance of digital systems and its concentration in large cities and in certain types of audience, mainly the young public. In other words, the socioeconomic conditions of the country and its own historical crises directly result in access to technologies and therefore generate a space of tension between traditional television consumption and the offer of the digital universe, represented almost exclusively by Netflix, which is faced, on the one hand, by cable operators with their respective streaming offers and, on the other hand, the initial efforts of the private channels and the public media system to explore the VoD scenario.

However, in the field of television fiction, it is worth highlighting the way in which the presence of new actors has led to a transformation of formats that is increasingly concealed and that is no longer limited to the preponderance of series in the audiovisual offer, but rather the narrative mechanisms have changed at a much faster pace and with a preponderance towards content that is agile, effective and focused in connecting the audience with the screens. On the other hand, and as it had been announced for years, the predominant trend in the country is to build stories about national life characters and thereby allude to a certain nostalgia recovering contexts of the collective memory of the nation, thus creating a dominant theme that debates the preponderance of the screens with narratives of violence and drug trafficking.

The audiovisual context in Colombia was characterized by three fundamental facts: the 2018 Fifa World Cup, in Russia, and the passion and media coverage of this sporting event; the presidential elections that showed a high polarization of the nation with its respective accompaniment by the media; and the debate by the mass media, mainly the television, in front of two situations in particular: on the one hand, the approach of a new legislation under the denominated law of convergence and, on the other, the preoccupation by the increasing number of subscribers to Netflix in the country, mainly in the cable operator sector, despite the still predominant national audience of traditional television in private channels. We can also highlight the paradox of public television in the nation, which, despite its constant search for quality and management of innovative formats and even exploration of other narrative forms such as transmedia, still does not occupy a prominent place in the preferences of Colombians.

Now, in the case of the distribution of television over the internet, the country evidenced its incipient access to this scenario, whose consumption is centralized mainly in large cities and urban centers, which results in a panorama where the offer is scarce in comparison with other countries around the globe. Netflix is the primary system for viewing content and it has as direct competition cable operators and a shy reaction of private channels and the public media system. These latter continue to hold a significant concentration of the audience through traditional television and digital terrestrial television (DTT) offer. Nevertheless, due to the growth of training offers and production opportunities in the nation, it is worth noting the increase of independent producers, whose productions have found on YouTube a stage to spread their contents.

1.1. Open television in Colombia

Open television in Colombia is made up of five national channels distributed as shown in Chart 1.

Chart 1. National channels of open television in Colombia

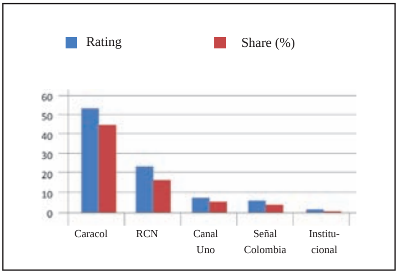
Private channels (3)	Public channels (2)
Caracol RCN Canal Uno	Señal Colombia Canal Institucional
TOTAL CHANNELS = 5	

Source: Obitel Colombia

As has been the trend in recent years, private channels, mainly Caracol, occupy a preponderant place for audiences and, although Canal Uno has begun to deploy strategies to achieve a better positioning in this area, it is undeniable that, with sports transmissions, which include the world soccer championship and cycling events, the production of reality shows and the management of a better remembrance in front of the public, Caracol remains as the dominant chain, followed, a bit far, by RCN. In the case of the public channel, despite its innovative, creative and well-produced bets, mainly in the field of documentaries, it still has no clear options to obtain the audience held by the three private channels in the nation.

Graph 1. TV rating and share by broadcaster

Broad-caster	Rating	%	Broad-caster	Share (%)
Caracol	16.7	57.5	Cara-col	48.20
RCN	7.4	25.5	RCN	18.11
Canal Uno	2.4	8.2	Canal Uno	6.71
Señal Colom-bia	2.0	6.8	Señal Colom-bia	4.45
Institu-cional	0.5	1.7	Institu-cional	0.93
TOTAL	**29**	**100**		**78.4**

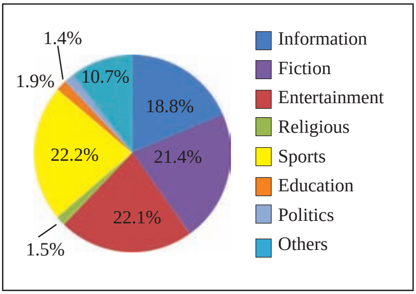


Source: Obitel Colombia – Kantar Ibope Media Colombia

Graph 1 shows the growth of Caracol as the channel preferred by audiences, both in the field of rating and in share, as well as the visible decrease of RCN, Canal Uno and Señal Colombia with regards to the dominant channel. For its part, Canal Uno, a renewed competitor in the private offer, despite having a recognized newscast, which has become its highest rated program, remains well below the levels expected to cope with the increasingly high concentration of the audience in relation to Caracol's offer. Public television, according to this graph, is once again facing a great disadvantage, despite making use of a varied and different offer than that of the large private channels.

Graph 2. Genres and hours broadcasted on TV

Broadcasted genres	Hours of transmission	%
Information	6990:53	18.8
Fiction	7940:23	21.4
Entertainment	8127:21	22.1
Religious	580:25	1.5
Sports	8273:07	22.2
Education	740:10	1.9
Politics	530:34	1.4
Others	3987:32	10.7
TOTAL	**37163:23**	**100**



Source: Obitel Colombia – Kantar Ibope Media Colombia

With the celebration of the World Cup and the appearance on the television grid of other sporting events, such as cycling races, sports became the most broadcasted genre during 2018, followed by entertainment, which ranks as the outstanding prime time leader through the production of reality shows on private channels. Fiction is located behind them, with a significant growt,h also being protagonist in the night and afternoon slots. Finally, and to a large extent due to the election days, the news appear.

1.2. Pay TV

During 2018, pay television was established as a service offered mainly by companies such as Claro, UNE, DirecTV, Movistar and other small companies, occupying a sector of growing interest among users in the country. So it had presence in homes between the different operators of 37.24%, which represented a total of 5,901,463 subscribers. The largest operator was Claro, which registered 2,411,807 subscribers in the year.

Thereby, pay TV has not only continued a vertiginous growth characteristic of recent years, but has also added to its service offer internet TV with its own platforms, such as Claro Video and Movistar Play, along with membership options to HBO Go and Fox+ to subscribers who have premium television packages. And so, although its offer includes national channels, there is evidence of a greater inclination towards international programming, with sports, cultural, film and series channels being particularly important.

Finally, in 2018, a regulation on pay TV was created, under the statutes of the ANTV (National Television Authority) and the Mintic (Ministry of Information and Communication Technologies). The Resolution n. 665/2018 defines “television by subscription as that in which the signal, regardless of the transmission technology used and subject to the same legal provision, is intended to be received only by persons authorized to receive it”. A rule that without a doubt allows pay TV to start exploring other mechanisms of interaction and transmission of content in the context of the emergence of the internet as a new scenario of competition and consolidation of audiences.

1.3. Advertising investments of the year: in TV and in fiction

Advertising investments in 2018 once again show the essential importance that television still maintains in the nation. In spite of the growing supply of content over the internet, it remains the main space for advertising diffusion, largely due to the fact of having an analogous coverage throughout the national territory and of DTT each time of greater magnitude. Thus, among the three national private channels, an investment of USD 2.8 million was made, with Caracol being the channel with the highest investment, of around USD 1.5 million. Likewise, in this context, fiction continues to be one of the main focuses of investment attention, with a consolidated amount of USD 890 thousand between *telenovelas* and series that are broadcasted in the nation. This leads to affirm that television, and particularly fiction, will continue to be consolidated as an essential space for advertising investment in the country.

1.4. Merchandising and social merchandising

Social merchandising and merchandising campaigns carried out by private channels in Colombia in 2018 and that go beyond what was seen in fictions were aimed at sensitizing viewers about many of the social problems that are experienced, in most cases, conjunctural ones. In this way, it was possible to see how Caracol, through its slogan "*Canal Caracol Inspira*" (Canal Caracol Inspires), promotes social awareness campaigns in the face of issues such as citizen coexistence, sexual violence, psychological violence and physical violence, among others, which are transmitted as commercials in the media's advertising.

On the other hand, there is *Titanes Caracol*, an initiative that rewards people who, from their social work, seek to change their environment day by day, giving solution to a problem that affects some Colombians; some of the categories are: culture, technology and connectivity, environmental sustainability, education, health and well-being. It should be noted that this space is transmitted in a segment that lasts from four to five minutes, during *Noticias Caracol*.

Meanwhile, RCN, with other private or public institutions, promote its social focus, as is the case of the Concurso Nacional del Cuento (National Short Story Contest), in conjunction with the Ministry of National Education (MEN). Its objective, in this case, is to encourage reading and writing in children. Also, RCN Voluntariado: Juntos Contra el Hambre (RCN Volunteering: Together Against Hunger) is a volunteer action that was carried out with the support of Bogotá's Food Bank, in which they packed and verified the food distributed to more than a thousand social organizations. In third place, this television network, with Servicios Jurídicos para Televidentes de la Ley del Corazón (Legal Services for Viewers of the Law of the Heart), opened a virtual legal office in partnership with the Universidad Libre de Colombia. It is worth mentioning that, for said space, messages were included within the broadcast of the fiction to promote the views of viewers, an incipient issue in the country.

In accordance with the above, it can be said that, in terms of social merchandising, the proposals of the private channels RCN and Caracol are opting to include social impact issues within their television narratives, which are linked to spaces enabled within their web portals, so that viewers can give their opinions and be part of these narratives. As for the 2018 version of Telethon under the slogan "*Para seguir siendo capaces*" ("To remain capable"), it was broadcasted for the first time on Canal Uno, in addition to RCN and Caracol, simultaneously.

1.5. Communication policies

During 2018 the Ministry of Information Technologies and Communications in Colombi,a through Sylvia Constain, as head of the portfolio, processed the bill to modernize the sector, also known as the Convergence Law. According to the official presentation, the objective of the bill is to initiate a process of modernization of the ICT sector in Colombia. As part of the objectives, it is necessary for the country to achieve the same level of competition in terms of connectivity as other countries and to become an attractive place for international investment aimed at the development of telecommunications.

In accordance with the above, the bill proposes basic aspects that are subject of study, reflection and criticism by different sectors of the Colombian society. This has generated a strong controversy, mainly at the end of 2018, both for its central points and for the restrictions and approaches that directly involve television. Thus, while for its defenders, with the law, the production of radio and public TV will be strengthened, connectivity will be promoted in the country and processes will be defined for regulating connectivity, the use of spectrum and a single ICT fund will be created as well as a single regulating body of the sector in order to unify the tasks of surveillance and control; for the detractors, such measures result in an excessive control in the production of content, a scarce or practically null independence of the surveillance agencies (when proposed as centralized and in the hands of the government), a series of gaps and questions about the ability of control of the State on the determination and production of contents, and the absence of clear rules of participation for the different companies in the sector. It is a heated debate that starred at the end of the year and is announced as the protagonist of 2019.

1.6. Digital and mobile connectivity infrastructure

In terms of infrastructure, digital terrestrial television (DTT) has had an important advance in 2018, in accordance with the goal of reaching full coverage in Colombian territory by the end of 2019. Initially, this process began in the cities of Bogotá and Medellín, where the first digital signal transmission stations are installed with the European Digital Video Broadcasting-Terrestrial-DVB-T1 technology. In 2011 an update of this technology to DVB-T2 is requested. Since then, this transit has been increasing, allowing the arrival of the signal to more cities.

By 2018, DTT has a coverage of 556 cities and municipalities of the 32 departments and 1,101 municipalities of the country, being these territories where more than 50% of the Colombian population is concentrated. The National Television Authority of the Republic of Colombia (ANTV), the National Radio Television of Colombia (RTVC), Caracol and RCN are part of the work team of this project. The coverage of private channels (Consorcio Canales Nacionales Privados) corresponds to 80% and the public channels (RTVC), to 70.3%. For the country, the main benefit offered by the system is its gratuity, since its use does not require affiliations, subscriptions or monthly fees. The installation is done by the users, who must have a TV that is compatible with the signal and an internal or external antenna with the European standard DVB-T2, or a decoder in case the TV is not compatible. The digitalization allows access not only to audiovisual content, but also audio, in high definition, offering the user a wide range of national and regional channels and stations.

On the other hand, in the area of broadband internet coverage, the growth of its expansion within the framework of the Plan Vive Digital continues. Although we can highlight a 70% increase in connections in the last eight years, it is also noteworthy that only 64% of households have such connections in the nation, which means that it is a service to which only 61.4% of the population has access. Although it does not annul the outstanding effort made in technological investment (such as the installation of ten submarine cables, more than 1,500 public Wi-Fi hotspots in parks and squares and the creation of white spectrum areas for free use in rural areas), it continues to pose challenges in internet access in a nation where, despite this technological expansion and the growth of mobile technology, it can still be said that of every two Colombians, one does not have access to mobile internet and 49% of the nation does not have broadband connection yet. Likewise, in the year 2018, the mobile companies spread the advertising of the change to the 4G spectrum and its possible massification. However, recent studies show that only 28% of the 57 million connections access this service. These figures show that the country is below the average of the region.

1.7. Independent producers

In 2018, Colombia has presented the strengthening of independent production companies, such as Dynamo, CMO Producciones, Laberinto Producciones and 11:11 Films & TV. These have produced series for Netfilx and Claro Video, in addition to the content made for national channels. However, small producers, such as Aurora Films, Sinergia Producciones, Cinema Films, Candelaria Films and Elevador Films, have found on the YouTube platform a way to make themselves known with miniseries or short films.

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

Table 1. Fictions broadcasted in 2018 (national and imported; premieres and reprises; and co-productions)

NATIONAL PREMIERE TITLES – 12	IMPORTED PREMIERE TITLES – 3
Caracol – 5 1. *La Cacica* (series) 2. *La Mamá del 10* (series) 3. *La Reina del Flow* (series) 4. *Loquito por Ti* (series) 5. *Tarde lo Conocí* (series) **RCN – 7** 6. *Hermanos y Hermanas* (series) 7. *La Luz de mis Ojos* (telenovela) 8. *Manual para Ser Feliz* (series) 9. *Garzón* (series) 10. *La Ley del Corazón* (series) 11. *Nadie me Quita Lo Bailao* (series) 12. *Paraiso Travel* (series) **CO-PRODUCTIONS 3** **Caracol – 3** 1. *El Señor de los Cielos* (Mexico, United States) 2. *La Piloto* (Colombia, Mexico, United States) 3. *Sin Tetas Sí Hay Paraíso* (Colombia, United States)	**Caracol – 1** 1. *Educando a Nina* (telenovela – Argentina) **RCN – 1** 1. *El Mariachi* (series – Mexico) **Canal Uno – 1** 1. *Verdades Secretas* (series – Brazil) **REPRISES – 2** **RCN – 2** 1. *Anónima* (series) 2. *Celia* (series) **TOTAL PREMIERE TITLES: 18** **TOTAL REPRISES: 2** **TOTAL OF TITLES BROADCASTED: 20**

Source: Obitel Colombia

In Table 1 we can appreciate the way in which the series becomes the dominant format in premiere fictions, as well as a decrease in productions with regards to the previous year, possibly due to the growth of the presence of long-lasting Turkish series in spaces like that of the afternoon, as it happens with cases like *Elif*, on Caracol, or at night with *El Sultán*, on Canal Uno.

Table 2. Premiere fiction in 2018: countries of origin

Country	Titles	%	Chapters/ episodes	%	Hours	%
NATIONAL (total)	**12**	**80.0**	**544**	**68.9**	**389:50:00**	**59.2**
OBITEL COUNTRIES (total)	**3**	**20.0**	**246**	**31.1**	**268:20:00**	**40.8**
Argentina	1	6.7	134	17.0	201:00:00	30.5
Brazil	1	6.7	40	5.1	13:20:00	2.0
Chile	0	0.0	0	0.0	0:00:00	0.0
Colombia	12	80.0	544	68.9	389:50:00	59.2
Ecuador	0	0.0	0	0.0	0:00:00	0.0
Spain	0	0.0	0	0.0	0:00:00	0.0
United States (Hispanic production)	0	0.0	0	0.0	0:00:00	0.0
Mexico	1	6.7	72	9.1	54:00:00	8.2
Peru	0	0.0	0	0.0	0:00:00	0.0
Portugal	0	0.0	0	0.0	0:00:00	0.0
Uruguay	0	0.0	0	0.0	0:00:00	0.0
Venezuela	0	0.0	0	0.0	0:00:00	0.0
CO-PRODUCTIONS (total)	**3**	**0.0**	**439**	**0.0**	**213:45:00**	**0.0**
Colombian co-productions	**2**	**0.0**	**327**	**0.0**	**129:45:00**	**0.0**
Co-productions between Obitel countries	**1**	**0.0**	**112**	**0.0**	**84:00:00**	**0.0**
GENERAL TOTAL	**18**	**100.0**	**790**	**0.0**	**658:10:00**	**100.0**

Source: Obitel Colombia – Kantar Ibope Media Colombia

Among the fiction premiered in 2018, national productions stand out, although there was an increasingly growing presence of co-productions and productions from Obitel countries.

Table 3. Formats of national and Ibero-American fiction

Format	National						Ibero-American					
	Titles	%	C/E	%	H	%	Titles	%	C/E	%	H	%
Telenovela	1	8.3	15	3.0	65:10:00	12.7	1	16.7	40	4	13:20:00	5.0
Series	11	91.7	476	97.0	433:25:00	87.3	5	83.3	195	46	268:45:00	95.0
Miniseries	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0:00:00	0.0
Telefilm	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0:00:00	0.0
Unitary	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0:00:00	0.0
Docudrama	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0:00:00	0.0
Others (soap opera, etc.)	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0	0:00:00	0.0
Total	**12**	**100.0**	**491**	**100.0**	**498:35:00**	**100.0**	**6**	**100.0**	**235**	**50**	**282:05:00**	**100.0**

Source: Obitel Colombia – Kantar Ibope Media Colombia

As for the formats of national and Ibero-American fictions in 2018, the predominance of the series in both cases is strongly evidenced, as well as a relative balance in the times of broadcast.

Table 4. The ten most watched titles on open television

	Title	Country of original idea or script	Channel	Format/ genre	N. of chap./ ep. (in 2018)	Time slot	Rating	Share
1	*La Reina Del Flow*	Colombia	Caracol	Series	82	Prime time	16.7	48.07
2	*La Mamá del 10*	Colombia	Caracol	Series	68	Prime time	14.6	43.04
3	*Sin Tetas Sí Hay Paraíso*	Colombia	Caracol	Series	63	Prime time	13.9	46.8
4	*Tarde Lo Conocí*	Colombia	Caracol	Series	105	Prime time	13.5	39.64
5	*Loquito Por Ti*	Colombia	Caracol	Series	51	Prime time	13.2	42.55
6	*La Piloto*	Colombia, United States, Mexico	Caracol	Series	80	Prime time	10.7	38.87
7	*La Cacica*	Colombia	Caracol	Series	40	Prime time	8.1	29.25
8	*El Señor de los Cielos*	United States, Mexico	Caracol	Series	80	Night	6.8	32.39
9	*La Luz de mis Ojos*	Colombia	RCN	*Tele-novela*	77	Prime time	5.5	16.81
10	*Garzón*	Colombia	RCN	Series	89	Prime time	5.5	16.35
Total productions: 8				**Foreign scripts: 2**				
80%				20%				

Source: Obitel Colombia – Kantar Ibope Media Colombia

For the year 2018, the ten most viewed titles offer an interesting panorama, showing a privileged place for Caracol, which has eight productions among the first places. Likewise, there are two co-productions and a series broadcasted in the night slot.

Table 4a. The ten most watched national titles on open television

	Title	Country of original idea or script	Channel	Format / genre	N. of chap./ ep. (in 2018)	Time slot	Rating	Share
1	*La Reina Del Flow*	Colombia	Caracol	Series	82	*Prime time*	16.7	48.07
2	*La Mamá del 10*	Colombia	Caracol	Series	68	*Prime time*	14.6	43.04
3	*Sin Tetas Sí Hay Paraíso*	Colombia	Caracol	Series	63	*Prime time*	13.9	46.8
4	*Tarde Lo Conocí*	Colombia	Caracol	Series	105	*Prime time*	13.5	39.64
5	*Loquito por Ti*	Colombia	Caracol	Series	51	*Prime time*	13.2	42.55
6	*La Cacica*	Colombia	Caracol	Series	40	*Prime time*	8.1	29.25
7	*La Luz de mis Ojos*	Colombia	RCN	*Telenovela*	77	*Prime time*	5.5	16.81
8	*Garzón*	Colombia	RCN	Series	89	*Prime time*	5.5	16.35
9	*La Ley del Corazón II*	Colombia	RCN	Series	71	*Prime time*	4.7	14.51
10	*Nadie me Quita lo Bailao*	Colombia	RCN	Series	49	*Prime time*	4.1	17.51
Total productions: 10				**Foreign Scripts: 0**				

Source: Obitel Colombia – Kantar Ibope Media Colombia

At the level of national production, again we see the prevalence of Caracol productions and the serial format.

Table 5. Audience profile of the ten most viewed titles: gender, age, socioeconomic level

	Titles	Channel	Gender %		Socioeconomic level %		
			Female	Male	AB	C	DE
1	*La Reina del Flow*	Caracol	7.6	7.2	18.7	12.9	7.7
2	*La Mamá del 10*	Caracol	6.1	5.2	13.7	10.4	7.2
3	*Sin Tetas Sí Hay Paraíso*	Caracol	16.4	11.9	34.8	29.3	15.3
4	*Tarde lo Conocí*	Caracol	17.3	10.4	31.5	31.0	21.6
5	*Loquito por Ti*	Caracol	15.8	11.5	31.7	31.7	21.9
6	*La Piloto*	Caracol	12.8	9.6	26.0	24.7	11.9
7	*La Cacica*	Caracol	10.4	6.3	19.6	21.1	11.8

8	*El Señor de los Cielos*	Caracol	6.2	7.8	17.8	15.1	8.2
9	*La Luz de mis Ojos*	RCN	6.7	4.5	13.8	8.8	7.9
10	*Garzón*	RCN	6.5	5.7	12.7	12.2	13.2

Titles		Channel	Age groups %			
			12 to 17	**18 to 24**	**25 to 39**	**40+**
1	*La Reina del Flow*	Caracol	7.4	6.1	9.1	6.6
2	*La Mamá del 10*	Caracol	5.1	4.2	5.5	6.3
3	*Sin Tetas Sí Hay Paraíso*	Caracol	13.8	10.8	12.2	16.4
4	*Tarde lo Conocí*	Caracol	11.5	9.1	10.5	17.9
5	*Loquito por Ti*	Caracol	10.2	8.2	10.4	18.1
6	*La Piloto*	Caracol	9.7	7.7	9.4	13.7
7	*La Cacica*	Caracol	4.9	5.6	6.3	11.2
8	*El Señor de los Cielos*	Caracol	4.5	5.1	6.6	8.4
9	*La Luz de mis Ojos*	RCN	5.6	3.1	4.2	7.2
10	*Garzón*	RCN	8.5	6.8	8.4	15.7

Fuente: Obitel Colombia – Kantar Ibope Media Colombia

As for the profile of the audiences of the ten most viewed titles, a significant concentration becomes visible in titles such as *Sin Tetas Sí Hay Paraíso*, *Tarde lo Conocí* and *Loquito por Ti*, so that they present a certain homogeneity and closeness among their audiences, aspect that configures them as productions of an important acceptance in the audience at a general level.

3. Monitoring VoD in 2018

During the year 2018, several TV fictions premiered, all of them series of different genres, such as drama, action and comedy on the platforms of VoD Netflix, RTVC Play and Caracol Play. The contents of television fictions were characterized by addressing topics related to social reality such as bullying, daily life and armed conflict.

3.1. VoD in Colombia

Chart 2. VoD in Colombia

	Platforms	Total
VoD linked to open TV channels	Caracol Play, RCNm, RTVC Play	3
VoD linked to pay TV channels	HBO, Fox	2
VoD linked to telecom companies	Claro Video, Movistar+	2
VoD without links to TV channels	Netflix	1
GENERAL TOTAL		**8**

Source: Obitel Colombia

Chart 2 presents three VoD platforms linked to national open television channels, two VoD platforms linked to paid channels that operate internationally (and which are accessed as telecommunication company's subscriber), two directly linked to telecommunication companies and a VoD platform without links to paid channels or open television.

3.2. Earnings of the VoD systems

In Colombia, the growing presence of VoD systems is made visible, although its use is mainly restricted to the consumption of Netflix, whose growth has been quite strong during the last year, reaching an estimated 1.1 million subscribers nationwide (Cigüenza, 2018). This aspect, added to having one of the most economical subscription costs worldwide, results in a profit that could be estimated as considerable, although it has not been revealed. However, in the case of the other systems, it is worth noting that only cable operators such as Claro and Movistar have generated important strategies of competition against this system, while national channels such as Caracol have chosen to make alliances and associations, given the low percentage of subscriptions they have and the ostensible preference in the nation for traditional television, due, in large part, to the relatively low connectivity that the country has to be able to enjoy audiovisual content through the internet or on demand.

3.3. Analysis of the VoD in 2018: national and Ibero-American premiere fiction

During the year 2018, television fiction (series) from Mexico, Colombia, Argentina, Chile, Brazil, Spain and the USA were released, being visible that in Colombia series were not issued on the VoD platforms of all the countries included in this study. The series dealt mainly with topics such as social problems and daily life, going through the genres of drama, comedy and action.

Table 6. National and Ibero-American fictions broadcasted in VoD systems in 2018

Premiere national titles	Premiere Ibero-American titles	Co-productions
Netflix – 2 1. *Distrito Salvaje* (series) 2. *La Ley Secreta* (series) **Caracol Play – 2** 1. *Pasada de Moda 2* (series) 2. *La Nena* (series) **RTVC – 2** 1. *48 Horas para Existir* (series) 2. *La de Troya* (series)	**Netflix – 11** 1. Narcos 4 (series – United States) 2. *Luis Miguel* (series – United States) 3. *Las Chicas del Cable 3* (series – Spain) 4. *Élite* (series – Spain) 5. *Ingobernable 2* (series – Mexico) 6. *Diablero* (series – Mexico) 7. *La Casa de las Flores* (series – Mexico) 8. *El Mecanismo* (series – Brazil) 9. *Samantha* (series – Brasil) 10. *Edha* (series – Argentina) 11. *Encerrados* (series – Argentina) **Claro TV – 2** 1. *Hijos de su Madre* (series – Mexico) 2. *El Rey del Valle* (series – Mexico) **Movistar – 3** 1. *Arde Madrid* (series – Spain) 2. *Virtual Hero 1* (series – Spain) 3. *Velvet Colección 2* (series – Spain) **Fox – 1** *1. Me Chama de Brunna 3* (series – Brazil)	**Fox – 1** 1. *Sitiados 2* (series – Colombia/ Chile)
Total: 6	**Total: 17**	**Total: 1**
GENERAL TOTAL: 24		

Source: Obitel Colombia

Table 6 shows that six series premiered nationally on VoD platforms: two on Netflix, two on Caracol Play and two on RTVC Play. At the Ibero-American level, 17 series premiered: 11 on Netflix, two on Claro Play, three on Movistar Play and one on Fox. There is a series co-produced between Colombia and Chile, which premiered on Fox platform. In total, 24 series released in 2018 were identified.

Table 7. Premiere fiction in VoD in 2018: countries of origin

Country	Titles	%
NATIONAL (total)	**6**	**25**
OBITEL COUNTRIES (total)	**17**	**70.8**
Argentina	2	8.7
Brazil	3	13.0
Chile	0	0.0
Colombia	6	25
Ecuador	0	0.0
Spain	5	20.8
United States (Hispanic production)	2	8.4
Mexico	5	20.8
Peru	0	0.0
Portugal	0	0.0
Uruguay	0	0.0
Venezuela	0	0.0
CO-PRODUCTIONS (total)	**1**	**4.2**
Colombian co-productions	**1**	**4.2**
Co-productions between Obitel countries	**0**	**0.0**
GENERAL TOTAL	**24**	**100.0**

Source: Obitel Colombia

Table 7 allows to recognize the expansion that exclusive productions have taken for the VoD platforms in Ibero-America. But it especially allows to recognize the role that Colombia is occupying in this aspect when considering that it has an equal number of productions as Spain and Mexico, great powers in the subject. It also allows the identification of Colombia and Chile as the only countries that joined forces to co-produce and broadcast an exclusive series to be broadcast on VoD platforms.

Table 8. Formats of national and Ibero-American fiction in VoD

Formats	National				Ibero-American			
	Titles	%	C/E	%	Titles	%	C/E	%
Telenovela	0	0	0	0	0	0	0	0
Series	6	100	67	100	17	100	171	100
Miniseries	0	0	0	0	0	0	0	0
Unitary	0	0	0	0	0	0	0	0
Others	0	0	0	0	0	0	0	0
Total	6	100	67	100	17	100	171	100

Source: Obitel Colombia

Table 8 shows a clear trend towards the production of series for this type of platforms in the Colombian supply. Of the 24 productions analyzed, 100% belong to this format, which allows viewers to access them according to their time possibilities and global consumption trends.

4. Fiction analysis: open TV, VoD and transmedia expressions in networks

For the analysis of this section the most watched production was taken as reference of the year, not only by the rating achieved, but, in essence, by presenting an interesting transition at the level of broadcasting of open television to internet TV (it is even pointed out that the second season will begin through Netflix) as well as a series of phenomena typical of an interaction with audiences in digital media. So that, although incipient, it begins to mark a possible route of interaction and management of transmedia elements, which show in an important way the state of transition in which Colombia finds itself in the scenario of digitalization.

La Reina del Flow was a production broadcasted between June and October 2018 on Caracol and available on Netflix ince November of the same year. This television fiction tells the story of Yeimy Montoya, a talented young woman who pays an unjust sentence in a New York prison and whose only desire is to go out and get revenge on all those who destroyed her life. The main characteristic of the production is the mixture of the traditional components of Latin American fiction with the urban music genre most listened to in Latin America. The plot of *La Reina del Flow* revolves around revenge, which allowed to maintain the expectation until the end. This factor added to romantic elements and social problems managed to keep the first viewing positions and establish an important connection with the audience, to the point of having presence in different platforms and digital spaces.

In its narrative proposal, the production also featured an interesting mix of melodrama and reggaeton, a trendy musical genre, which allowed to have the participation of great representatives of this genre, appearing as special guests and/or as interpreters of some of the musical themes. The fiction in turn was taken to the transmedia spaces through the publication of the songs that were part of the soundtrack of the *telenovela*, reaching platforms such as YouTube, where some of the musical themes went viral, obtaining millions of views. Some examples are songs like *Perdóname* (37 million views) and *Depredador* (32 million views), which are part of the official album published on streaming music platforms such as Spotify, Deezer and Apple Music.

Precisely for this reason and for its strong presence in the digital scene, *La Reina del Flow* was awarded in the category of Best Digital Strategy Program at the Produ Awards 2018, in recognition of the adaptation of fiction to the use of new digital platforms and the search for innovative strategies at this level. Thus, part of the award-winning strategy consisted on the promotion of the profiles of the actors of the series for individual dissemination on each platform, as well as the sending of notifications to users from caracoltv.com and the management of different newsletters, to promote the series through videos published on official social networks. To this was added the publication of notes in different portals on the plot of the fiction and the creation of music albums, an aspect that became visible in digital spaces such as Noticias Caracol, El Espectador, BluRadio, Lakalle, Shock and Cromos, among other auto-ads and diffusion strategies.

In Instagram, in the official profile of Caracol, the broadcast of the production was reinforced through the publication and interaction in this social network, making use of all the internal tools such as stories, surveys, clips, tests, memes, galleries and InstagramTV. The publication that received the most interactions was the one in which the second season was announced, with 46,626 likes.

However, although *La Reina del Flow* does not have an official Instagram profile, there are several unofficial accounts (fan pages), which total almost 334,479 followers (@lareinadel.flow and @Reinadelflowtv stand out). Likewise, the hashtag #lareinadelflow has had 24,922 publications, most of them related to the characters and actors, sharing photographs and short videos of important scenes of the production.

With regards to Facebook, there are five unofficial pages of *La Reina del Flow*. The most popular account has 549,172 likes and 615 thousand followers, is active and makes two daily publications. The series is rated within the social network with 4.9 out of 5 stars, with 3,082 votes. Within the page comments of support, congratulations and messages about the great expectation with the second season are received. In addition, there is elaboration of memes with images of the series, photos, news or posts of the characters.

The transmedia broadcast strategy on Twitter followed the same general guidelines, focused on the channel, but with a vital orientation towards the audience. Thus, from the official page of Caracol and replicated through various fan pages, live narration was made with publications that described part of the plot and invited to comment opinions or perceptions, accompanied by screenshots or clips of the episode. Alongside this follow-up of the narrative, in Caracol Play profile, videos of the actors were published, inviting to follow the production on the video on demand platform of the channel, where each episode was published for free in the following seven days after its broadcast. The release of the official telenovela album on streaming music platforms was also promoted, and tweets were published directing to the channel's notes on the characters and the plot, and to specials that are made in other Caracol productions about the telenovela or about the protagonists, interconnecting the two social platforms with the pretext of fiction as the axis of connection.

Within the reactions of the transmedia publications of the official and unofficial accounts, the great presence of international audience stands out, which shows the great reception of the production. An evidence of this is that the two fan pages on Instagram that have more followers are Ecuadorian and Chilean. This global acceptance can be explained by the specific use of reggaeton and that combination of music and action as central elements of the narrative bet. In this measure, the musical nature of the production became the central pillar of the digital strategy, which, through the publication of the album and its songs, together with the interactions between networks, constituted the elements that marked the transmedia success of the television fiction, by integrating platforms and possibilities of connection to its fictional narrative, amplifying the participation of the audience and generating presence not only in the proper sites of television fiction, but also in spaces of musical order and in the news panorama of the nation. A strategy in which, although the narration was not modified to inhabit the screens, it was possible to interconnect them through the resources of the constructed plot.

In this way, it is possible to point out that, in light of *La Reina del Flow*'s strategy, it is clear that in Colombia, although there was no clear construction of a transmedia process in all forms during 2018, interesting connections between all the spaces and screens appear. So the possibilities are available not only to take advantage of the presence in different elements of the current communicative ecosystems, but also to start exploring other forms of narrative interconnection that lead to establishing processes of remembrance and participation of the audience and to enable that the different media, paraphrasing Scolari (2013), also count.

5. Highlights of the year

The year 2018 had some fundamental trends at the level of television fiction in Colombia. On the one hand, the important integration between narrative and music as a central combination to capture audiences through the appeal to nostalgia or the trend of the moment; on the other, the preponderance of the relationship between the daily lives of people and the reconstruction of the lives of celebrities in different areas of national life; and, finally, the preponderance of issues related to crime, drug trafficking and, in general, the action itself on issues such as revenge and the world of illegality and corruption.

Thus, in the first case, there are fictions such as *La Reina del Flow*, *La Luz de mis Ojos*, *Tarde lo Conocí*, *La* Cacica and *Loquito por Ti*, which are concerned with establishing an important connection between the story that is told and the story that the music gives context to, being at the same time an important sound element to accompany the development of the plot and a kind of protagonist of the narrative proposal. In this sense, reggaeton, porro, vallenato and popular music played a fundamental role in each of these productions, both to offer a certain radiography of each musical genre and to make an essential part of what was told on the screen. In this way, the meaning of the fictions was not only in the story that was told, but also in the songs that appeared at each moment and as they characterized specific moments within the script and specific connections with the memory or the present of the viewers. This musical presence allowed fictions to connect with the audience, both to appeal to nostalgia and to tune in with the prevailing genres and styles on the radio.

In the second case, that is, the relationship between the daily life of people and the lives of celebrities, it is worth highlighting the cases of *Garzón*, *Tarde lo Conocí* and *La Cacica*, which reconstruct the lives of Jaime Garzón, Consuelo Araujo and Patricia Tehran, bringing them closer to a certain intimacy and connection with the audience by humanizing these figures, elevated to prestigious places by their critical journalism, their political activism or their relevance in the musical field, and which are explored with a certain sympathy through the mixture of the homage and the possibility of generating deep identifications between the character and the spectator. In this way, despite the harshness of the disappearance of each of them, two murdered and the third deceased in a tragic accident, their lives become a melodramatic odyssey, sometimes with elements very distant from each other's real life, but with that intentionality to connect the audience through the figure of seeing themselves on the screen, in those figures that seemed distant and now, as a result of their narrativized everydayness, they seem like their neighbors, their friends and, in some cases, their reflections in the mirror into which the screen is transformed.

In the third case, that of the narratives of violence, proposals appear, such as the *El Señor de Los Cielos*, *La Reina del Flow*, *Sin Tetas Sí Hay Paraíso* and *La Piloto*, which include a strong relationship with the culture of illegality and the handling of plots characterized by speed, action and the emphasis on the use of contexts marked by the crime footprint. In this way, the tendency that has characterized the time of the so-called *narconovelas* is repeated again as a central axis of productions that, additionally, mark a certain homogeneity in their *rating a*t the level of ages and socioeconomic conditions. It evidences an important identification in the audience with this type of phenomena and, in spite of apparent rejections in the general population and the exploration of other narratives such as those of famous people, it still remains an important thematic source for the conquest of audiences in the nation.

Now, although it does not constitute in itself a clear affiliation to these already demarcated tendencies, the case of *La Mama del 10* deserves special attention, a fiction that is located in an interesting limit between the fictions that bring together the lives of celebrities and takes advantage of the soccer context of the year. Although it does not tell the story of any player of the national soccer teams, as the series *La Selección* did at the time, it shows story of achievement that practically characterizes the nation's athletes. Thus, it appeals to the same intimacy that is used as a resource in the narratives of the figures of the national reality, but, in turn, it recovers the story of heroic growth and development easily related to the sports context, without leaving aside the permanent connection with the World Cup context and the way in which it also influences the consumption of fiction.

Thus, when reviewing these three trends as well as the particular case of *La Mama del 10*, a particularity noticed is the fact that fictions in Colombia are closely linked to a kind of communion between the spectators and the television product that is offered to them. Stories are increasingly closer to everyday life and, for this, the use of resources such as music or the presence of their idols and figures is central, so that they become a vital part of existence and a source to interact with different additional elements in the current multiscreen universe. It is no coincidence that, in some cases, the music of the productions also began to be distributed by various means as an accompaniment to the consumer experience. In the same way, and together with the almost absolute preponderance of the serial format, it is essential to highlight the importance of the vertiginous visual and narrative rhythm and veils that are strongly perceived in the narratives of violence and crime that still captivate spectators and that also become the standards of the daily life of the Colombian, whose visual representations move between music, crime and closeness to their idols.

6. Theme of the year: television distribution models by the internet: actors, technologies, strategies

The theme of the year – television distribution by the internet – has become a real challenge for our research team given the difficulties to have reliable information about it, not only because of the opacity of the data, but also because of the penetration of high-speed internet in the country. Perhaps two relatively recent statements – a) with the internet, television will no longer be what it was, it will no longer be the great medium; and the more recent one and part of the popular imaginary, b) the growth of Netflix is causing a transformation of the way of watching and making television – represent an interesting opening in the country to a global phenomenon, but in the nation it is particularly concentrated in urban centers and large cities. These specific references and the changes that have occurred in the organization and promotion of the major national programmers and the dominant channels in pay television, under the dominant character of the cable operators, and their concern regarding the presence of Netflix in the market, constitute the materialization of the theme of the year or are directly related, in the case of our country, with said theme.

What does this imply? In our opinion it means the emergence of a phenomenon that globally has a greater development and greater magnitude in terms of the impact of the operation of television and internet mediation, but in countries like ours it is just a nascent phenomenon with a fairly restricted impact, given the restriction on access to pay television or private platforms. In other words, viewers in Colombia remain fundamentally attached to the consumption and traditional distribution of television content. Welcoming the proposed scheme for this analysis, we will immediately refer to: actors, technologies and strategies.

Regarding the actors present in this structure of television distribution by the internet in the country, we find a transformation underway, directly linked to factors such as: the penetration and expansion of new information and communication technologies, with the consequent unevenness between the rhythm of the respective public policies against the dynamics and speed of the initiative of the private sectors in the field; the capacity of penetration and the offer of contents and formats by the actors with regards to uses, customs and expectations of the communities integrated with media and technology; the capacity or purchasing power of the different social sectors compared to the differentiated consumption of television.

In the absence of consolidated figures in this competition for the new television distribution offer, press headlines are again relevant, such as: “Netflix is threatening the distribution of Colombian television” (Cigüenza, 2018) and “RTVC, Claro and Movistar ‘battle’ with Netflix in Colombia” (América Retail, 2016). The above means, more or less, that the role regarding the distribution of television content over the internet in the country now falls on the protagonists who once dominated the media’s market, faced with the emergence of the so-called streaming colossus. Thus, except for the risky initiative of the public media system RTVC – despite its very limited audience in the country –, in terms of exploring new formats, schemes and strategies of production and distribution of content via streaming, the scenario of television distribution via the internet is dominated by cable operators and Netflix, with a late reaction by private open television channels – Caracol and RCN – to embark on new business formulas and actively respond to the power of multinationals.

So, as a scheme, the structure of this television distribution, from the largest to the smallest scale in the country, is populated by: Netflix, Claro Video, DirecTV, Movistar and other smaller cable operators. These cable operators allow access to streaming platforms of international channels such as HBO Go and Fox+. Then, there are the transmission systems of private channels of open television in Colombia: the one with the most impact is Caracol Play, followed by RCN. And finally comes RTVC: although it has gone ahead in terms of the implementation of national streaming and innovation in the development of content, its limited audience reduces its impact.

In the second topic of the proposed analysis scheme, in which, according to the suggested bibliography and the commentary-guide for the elaboration of the topic, where the technologies that allow the presence and articulation in internet of portals, suppliers, networks and intermediaries in the network infrastructure are referred, we will try to give an account in charts 3 and 4.

Chart 3. Network infrastructure in Colombia

Internet portals	Internet service providers Telecom/ ISP	Content distribution networks	Digital intermediaries
Netflix, Claro Video, Movistar Play, Caracol Play, RTVC Play, HBO Go, Fox+	Claro (Telmex Colombia), Movistar, ETB, UNE, Coldecon	BaishanCloud, CDNetworks, CDNVideo, Cloudfare, Level 3, Limelight, Verizon Digital Media Services, CIN, NAP	Analytics Data Colombia, Alianza Caoba, IDF, Bluecell, Fixed Group, Kreativos.Net

Chart 4. Structure of the industry and its composition from the political economy

Name of the corporation/ parent company	Economic sector	Modality of participation in the network infrastructure	Level of dominance in the market	Public/private/ nationality
Netflix	Silicon Valley	Web portal and application	VoD subscription (accessed through cable operator: Claro, Movistar, others)	Private United States
RTVC Play	Public mass media	Web portal, open TV and application	Open VoD (accessed via cable operator: Claro, Movistar, others)	Public Colombia
Movistar Play	Mass media/ Telecom	Web portal, cable TV and internet service provider	VoD subscription	Private Spain
Claro Video	Mass media/ Telecom	Web portal, application, cable TV and internet service provider	VoD subscription	Private Mexico (as telecom: Telmex Colombia)
Fox+	Mass media/ Telecom	Web portal, cable TV (access via cable operator: Claro, Movistar, others) and application	VoD subscription through subscription provider (Claro, Movistar, others)	Private United States

HBO Go	Mass media/ Telecom	Web portal, cable TV (access via cable operator: Claro, Movistar, others) and application	VoD subscription through subscription provider (Claro, Movistar, others)	Private United States
Caracol Play	Mass media	Web portal, open TV and application	VoD subscription accessed through internet provider (Claro, Movistar, others)	Private Colombia

Chart 3 shows the network infrastructure. In this sense, it is pertinent to refer to internet service providers (ISP) in the country, which confirms that, in some way, in proportion to the respective growth of internet access and consumption, suppliers and their respective technological capabilities and innovation bets are still concentrated, as evidenced in Chart 3. Note the particularity with regards to Claro, which participates in different items, because not only does it have a content transmission system, but also provides internet services as a telecommunications company in which it plays a central role as the dominant operator in the nation. Likewise, it is worth highlighting the incipient presence of UI/UX intermediaries, which, although concentrated in large urban centers, mainly Bogotá, Medellín and Cali, they still do not have a strong presence in the nation, as is the case of CDNs, which only seven are considered, also linked to the large cities mentioned and Barranquilla, while only two IXP appear, denoting the barely initial nature of these services in the nation.

Regarding the structure of the industry and its composition from the political economy, Chart 4 illustrates in a reliable way the monopoly character of control of said production structure and television distribution, which allows us to make the following inference: that monopoly character, already detected at the level of the traditional way of producing and distributing the television content in the country, corresponds fully with the situation that is reflected in the chart of the reference and that indicates how, in the virtual context, the situation of control and monopoly of the production and distribution of television content remains unchanged, except for the decisive presence of Netflix, notwithstanding that access to its contents and therefore to the current distribution structure can only be made via cable operator, which in turn works as an internet provider. We believe that this situation, which is reflected in our country, is similar to that of many, if not all, Latin American countries in a greater or lesser proportion. The question is: how much does this coincide or not with what happens in the North American television industry and its offer obviously more varied and dynamic?

Finally, in the last element to be considered for the analysis of the distribution of contents by the internet are the strategies, dimensions of the process that allow knowing the main forms of insertion, positioning and maintenance of a certain position in the market by the actors. In this regard we have, in the case of our country, the strategies described in the following.

Netflix launches an alliance with Caracol – the largest current television producer in Colombia – to carry out and circulate the production of this open television channel on its streaming platform, which results in both economic and communication benefits in the provision and distribution of said television service, thus contributing to maintain the dominant position in the market for both players.

Netflix produces television content directly in the country – for example, *Distrito Salvaje* –, which in turn distributes through its platform both nationally and internationally, thus achieving a multifunctional presence and benefit. Likewise, the management of social networks by Netflix is also demonstrative of the way it goes to the combination of various strategies in the field of production as well as in the circulation and distribution of content, integrating trailers, memes, adaptations and various proprietary content segments, with traditional television resources, to promote their products in general.

We can also mention Netflix's strategy regarding the combined and systematic use of elements and content of traditional television advertising in the perspective of being used as an informative strategic mediation to promote and position the distribution of its own contents, creating through these messages and guidelines the idea of being in the same and unique circuit or the most important and impactful in the distribution of television content.

Perhaps as a persuasive reaction, Claro, as the largest cable operator and provider of internet services and cellular telephony in the country, offers free access to Claro Video, as an integral part of the service it provides. With this offer, it seeks that the user/consumer adheres to the streaming content to increase the effectiveness of the multiproduct by making it concurrent and thereby strengthen its control of this market.

Caracol has adopted a strategy, in proportion to its technological capacity and its first-class presence in the open television market, without neglecting the new structure of content circulation over the internet (there its association with Netflix), a strategy that includes production of webseries to be viewed through its platform and the programming of contents, programs and formats in replacement mode to match the product oriented to novelty and at the same time to nostalgia.

Finally, in the case of RTVC, the Colombian public media system, despite its reduced participation in the audiences, stands out for the quality of its productions, which circulates via streaming, but including elements that reinforce the value or meaning of the contents by the authenticity they reflect, the vocation of the local and of the processes of identity, the social and cultural recognition of social and community sectors that are the recipients of these specific contents, all of this to make quality their main positioning strategy.

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5

Mexico: opening to genre diversity, fandoms and the consolidation of VoD platforms

Authors:
Darwin Franco, Gabriela Gómez, Guillermo Orozco[1]

1. Mexico's audiovisual context in 2018

"The winds of change" after the resounding results of the presidential elections that took place in Mexico in 2018 could also mean a change in the national media ecosystem and in the exercise of freedom of expression, since the new leftist president, Andrés Manuel López Obrador, has started his six-year period by placing outstanding communication academicians at the head of the broadcasting system, but he has also made a 180º turn in terms of his personal relationship with the media, by offering daily morning conferences where the microphone is opened for the journalists to ask questions to the president and his ministers, something that heretofore had been unheard of in government communication in Mexico.

In the media context, 2018 was a significant year because two important events coincided: the presidential elections and the World Soccer Cup in Russia; this latter event, which has historically left great profit for national television, confirms once again the fall in ratings experienced now systematically by national television networks since no match where the Mexican soccer team played or even the final match between France and Croatia managed to rank among the 20 most viewed shows. The largest rating reached by the World Cup in Mexico was 14.4 points.

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[1] We thank Nielsen Ibope México, for providing the information about audience and programming for this chapter. The opinions about them are the responsibility of Obitel Mexico.

Accepting that the audience, and therefore the profits, is not anymore hegemonically in television viewing, Televisa and TV Azteca have expanded their presence and participation to the video on demand (VoD) system. For example, Televisa made a strategic alliance with Amazon Prime and developed the series *Diablo Guardián*; TV Azteca created Dopamine, a company exclusively dedicated to making premium contents for the international market of VoD systems.

In turn, Netflix expanded even more its presence with the production of successful series like: *Luis Miguel*, *El Chapo*, *Club de Cuervos*, *Ingobernable* and *La Casa de Las Flores*. In fact, Mexico – after the USA – is the country where this company produces the most contents exclusively.

In addition to information about the subsistence of the old media system and the establishment of new production, distribution and consumption guidelines, this chapter will explain how the internal market is being modified not only in terms of production and circulation of TV fiction but also in the forms of interaction and interactivity with the audiences, who have chosen to turn their TV consumption to VoD platforms or systems.

1.1. Open television in Mexico

Chart 1. National open television networks/channels in Mexico

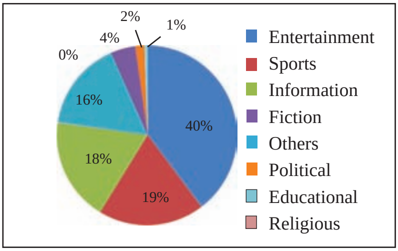
Private networks (7)	Public networks (3)
Televisa (channels 2, 5 and 9) TV Azteca (channels 1 and 7) Imagen TV (channel 3) Multimedios (channel 4)	Once TV (channel 11) Conaculta (channel 22) Una Voz Con Todos (channel 14)
TOTAL TELEVISION NETWORKS = 10	

Source: Obitel Mexico

The Federal Telecommunications Institute, which is the regulating body, a few days before the end of former president Enrique Peña Nieto’s administration, unanimously extended the validity of the operation of 411 television stations that broadcast digital signals in different localities in the country, whose owners are Multimedios, Televisa and TV Azteca, and whose operation licenses are valid until 2038. This decision, along with the granting of six television tenders in six states of the country, turned Multimedios – originally from Monterrey, Nuevo León – into the fourth national television network and now it has TV coverage reaching 46 million viewers.

Graph 2. Genre offer in TV programming TV[2]

Genre	Hours	%
Entertainment	42215	40
Sports	20144	19
Information	19471	18
Fiction	17120	16
Others	7512	4
Political	4524	2
Educational	2105	1
Religious	420	0.3
Total	105999	100



Source: Obitel Mexico

1.2. Pay TV

Inegi and Banxico data point out that only in 2018 pay television received an investment of over 11 billion pesos. Izzi, a company owned by Televisa, dominates preference among subscribers, with 30%, followed by Sky (also owned by Televisa), with 20.1%, Megacable, with 16.7 %, Dish, with 16.6%, and Total Play, with 8.6% (Lamac, 2018). The growth of paid television has been such that 67 out of 100 households in the country have access to this service.

1.3. Advertising investments in TV and VoD systems profits

The 2018 FIFA World Cup favored the incomes of the TV networks that aired the matches. Thanks to this event, net sales of the Televisa Group rose 8.2% in 2018 (a total of 101.282 billion pesos

[2] Graph 1 was not made this year due to lack of information.

more than the year 2017). Sales in the content segment increased as a result of the sublicensing of some rights to air (TV and digital) contents of the Soccer World Cup not only in Mexico but also in other Latin American markets. Nevertheless, Televisa's stocks at the Mexican Stock Exchange, at the beginning of 2019, had a low of 7% for the first quarter, which means its greatest fall since 2001 and a crash from 83% of its quarterly profits (Proceso, 2019). In turn, TV Azteca obtained greater demand for advertising and greater costs – due to the soccer broadcasts. Its stocks at the Mexican Stock Exchange fell 31% (977 million pesos), and its incomes dropped in 8% (3.693 billion pesos).[3] The third open private TV network in Mexico, Imagen TV, does not report data on advertising income, but it is known that the main advertisers prefer to advertise on Televisa and TV Azteca.

It is foreseen that, with the new government, governmental advertising will decline in the media. Therefore, this factor will affect advertising-related incomes for TV networks.

On the other hand, Netflix's profits doubled worldwide in 2018, obtaining 1.211 billion dollars.[4] Despite the above, its Wall Street stocks dropped in the last quarter of 2018 (to 4.190 billion dollars), 3% less than in 2017.[5]

The advertising industry in Mexico experienced a growth of 5.9% (as a result of the presidential elections and the Soccer World Cup), but there are no guarantees in view of the arrival of a new government, so the industry people estimates a smaller growth for 2019, between 3% and 5%. Experts claim that in 2019 investment will be mainly dedicated to digital platforms.[6] Some of the actors contributing to the growth of internet advertising are the influencers,

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[3] *El Financiero*, 2019.

[4] Retrieved on March 7, 2019 from https://www.informador.mx/economia/Netflix-duplica-ganancias-llega-a-mil-211-millones-de-dolares-20190118-0011.html.

[5] http://bolsamexicanadevalores.com.mx/ganancias-netflix/.

[6] https://expansion.mx/mercadotecnia/2019/01/17/la-inversion-en-publicidad-en-mexico-crecera-hasta-5-en-2019.

since the demand to invest in this sector has grown (from 2014 to 2016, investment increased 34%).[7] It is foreseen that the influencer market will reach a value of between 10 and 15 million dollars for 2019. Without doubt, the tendency continues to be the decline of advertising on television versus the internet.

1.4. Merchandising and social merchandising

The opening of the subject matters and discourses of national fiction in 2018 focuses on trapping those audiences that have abandoned the TV screen. That is why Televisa bets on including on the *telenovela Mi Marido Tiene más Familia* a romantic story between two male teenagers, which took place outside the stereotyped frames that the TV network has used to portray sexual diversity and aired the first gay kiss on a *telenovela* by this company.

Among the drives that have been taken to incorporate social merchandising are the topics of violence and the violation of human rights the country has been experiencing since 2006. On the *telenovela Por Amar sin Ley* – also by Televisa –, whose plot deals with a lawyers' office, it was decided to incorporate relevant social cases, such as forced disappearances, the murder of women, dispossessions, among others.

1.5. Communication policies

The renewal of the concessions of the two main national television networks, Televisa and TV Azteca, took place in the last weeks of Enrique Peña Nieto's Administration. This is a politician who, at his moment, was favored by media preference in the 2012 presidential elections. Without an assessment about the way in which the radioelectric spectrum was exploited, both TV networks received from the Federal Telecommunications Institute an extension for their concessions until 2038. This announcement was sped up so

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[7] https://www.forbes.com.mx/la-industria-de-los-influencers-gana-terreno-en-el-pastel-publicitario/.

that the decision of renewing or not their concessions was not in the hands of the new president, López Obrador – a stout critic of the political stands taken by both networks.

One of the first actions by the new Mexican government was to integrate all the State's media in only one coordination that joins the National System of Radio and Television, channels Once and 22, Radio Educación, Television Educativa, the Mexican Institute of Radio and Notimex agency. Perhaps the most significant change occurred in the appointment of their heads, since many of them come from academia and journalism, two trenches from which the way the public media have been managed is criticized.

Jenaro Villamil was appointed head of the system; Armando Casas was appointed coordinator of the National System of Radio and Television; at the head of Radio Educación, Gabriel Sosa Plata; at the Mexican Institute of Radio, Aléida Calleja; at Televisión Educativa, Lydia Camacho; on Radio Television and Cinema, Rodolfo González; and at Notimex, Sanjuana Martínez. It is expected that their appointments are a veritable opportunity for the public media to become a real counterweight to the predominance of commercial media.

1.6. Digital and mobile connectivity infrastructure

According to information by IAB Mexico (2018), internet penetration reaches 72.7 million people (64% of the total population). This figure could increase in the next few years, due to the fact that the new government has launched a public policy called "Internet for all", a program that will provide internet service in different spaces (the goal is to provide the service in 250 thousand public places). This program replaces "Mexico Connected", established by the previous federal government, a program passed in the year 2013 and that, thanks to its implementation – according to what is mentioned on its official site (mexicoconectado.gob.mx) –, managed to increase the number of internet users (via cellular phones) in 40 million.

Mexico occupies the fifth place worldwide in terms of the number of Facebook users, with a total of 85 million. A study published by the Internet Association in Mexico (asociaciondeinternet.mx) reports that the internet user profile is 51% female and 49% male, older than 8 years (66 %); 50% consider that a barrier in the condition of access is slow connectivity in the area where they live; and the moments of the day when they mostly log in are the morning (from 10 a.m. to noon, 73%) and night (from 9 p.m. to midnight, 93%); 94% of the responders are logged all day long. They connect from their households (86%), by a hired wi-fi (56%), using a smartphone (76%) and/or laptop (66%). The activity that they perform is to log in on the social networks (89%). In this study, the social network that they claim to use more frequently is Facebook (98%), followed by WhatsApp (91%) and YouTube (82%).

On the other hand, a situation that could affect thousands of telephony users is approaching. It has been announced that the "2G network will be switched off", orchestrated by the companies AT&T and Movistar, which may affect over 27 million users of 2G network.[8] It has been announced that the 5G network will reach Mexico in 2020, and the company that will launch it in the first place is Telcel, from América Móvil.

1.7. Independent production companies

The growth in the number of independent production companies remains in the sphere of TV fiction, however not in their connection with television, but rather with VoD platforms. For example, series like *La Casa de las Flores*, *Club de Cuervos 3*, *Ingobernable 2* and *Diablero*, all of them aired by Netflix, have their creative basis in independent production companies that had only made films so far. This movement has caused film directors like Manolo Caro (*La Vida Inmoral de la Pareja Ideal*), José Manuel Cravioto, Rigoberto

8 https://www.sdpnoticias.com/tecnologia/2019/02/02/en-mexico-apagon-de-red-2g-dejaria-sin-comunicacion-a-27-millones-de-usuarios.

Castañeda (*Kilómetro 31*) and Gaz Alazraki (*Nosotros los Nobles*) to have a close relationship with Netflix, whether it is to create new contents or to continue other seasons of series that they are already broadcasting on this platform.

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

Table 1. Fictions broadcast in 2018 on open television (national and imported; premiere and rerun; and co-productions)

PREMIERE NATIONAL TITLES – 28	PREMIERE IMPORTED TITLES – 7
Televisa – 15 national titles 1. *Por Amar sin Ley* (*telenovela*) 2. *Hijas de la Luna* (*telenovela*) 3. *Tenías que Ser Tú* (*telenovela*) 4. *Y Mañana Será Otro Día* (*telenovela*) 5. *La Jefa del Campeón* (*telenovela*) 6. *Mi Marido Tiene más Familia* (*telenovela*) 7. *Like: la Leyenda* (*telenovela*) 8. *La Bella y las Bestias* (*telenovela*) 9. *Como Dice el Dicho* (drama) 10. *Amar a Muerte* (*telenovela*) 11. *La Rosa de Guadalupe* (drama) 12. *Sin Miedo a la Verdad* (series) 13. *Vecinos 4* (series – comedy) 14. *Simón Dice* (series – comedy) 15. *Según Bibi* (series – comedy) **Co-production – 1 title** 16. *La Piloto* 2 (series – Mexico, USA, Colombia) **TV Azteca – 7 national titles** 17. *Educando a Nina* (*telenovela*) 18. *Más allá del Miedo* (series) 19. *Lo que la Gente Cuenta* (drama) 20. *Mujeres Rompiendo el Silencio* (drama) **Imagen TV – 1 national title** 21. *La Taxista* (*telenovela*)	**Televisa – 6 imported titles** 29. *Descontrol (*series – USA) 30. *Señora Acero 4* (series – USA) 31. *Jenni Rivera: Mariposa de Barrio* (series – USA) 32. *El Chema* (series – USA) 33. *Al Otro Lado del Muro* (series – USA) 34. *Enemigo Íntimo* (series – USA) **Conaculta – 1 imported title** 35. *Tiempo Entre Costuras* (series – Spain) **RERUN TITLES – 5** **Televisa – 3 titles** 36. *Fuego en la Sangre* (*telenovela* – Mexico) 37. *La Fea más Bella* (*telenovela* – Mexico) 38. *Por Ella Soy Eva* (*telenovela* – Mexico) **TV Azteca – 1 title** 39. *Hasta que te Conocí* (series) **Once TV – 1 title** 40. *Paramédicos 3* (series) **TOTAL PREMIERE TITLES: 35** **TOTAL RERUNS: 5**

Once TV – 2 national titles 22. *Malinche* (series) 23. *Guardia García* (series) **Conaculta – 4 national titles** 24. *Revolución: las Batallas de Celaya* (series) **Co-productions – 4 titles** **TV Azteca – 3 co-productions** 25. *El César* (series – Mexico, USA) 26. *Tres Milagros* (series – Mexico, USA, Colombia) 27. *Rosario Tijeras* (series – Mexico, USA, Colombia) **Imagen TV – 1 co-production** 28. *Atrapada* (series – Mexico, USA, Colombia)	

Source: Obitel Mexico

A noticeable change in premiere national fictions is that there is greater interest in the production of comic series or *sitcoms*, which have positioned in the audiences' preferences, since they run right after the star *telenovela* and the evening news, which allows linking both viewing since they run for only 30 minutes.

Another noteworthy issue is that the *telenovela* format with more than 100 episodes is losing validity, since it has been decided to make seasons of the most successful *telenovelas*. That is the case of *Mi Marido Tiene Familia*, which was released in 2018, and its second part, *Mi Marido Tiene más Familia*, which was the most viewed TV fiction. This is an adaptation of the South Korean TV series *My Husband Got a Family*, which arrived in the country via Netflix.

Table 2. Premiere fiction in 2018 on open television: countries of origin

Country	Titles	%	Chapters/ episodes	%	Hours	%
NATIONAL (total)	**28**	**80.0**	**1579**	**71.0**	**1.807:00**	**84.0**
OBITEL COUNTRIES (total)	**7**	**20.0**	**350**	**29.0**	**351:00**	**16.0**
Argentina	0	0.0	0	0.0	0:00	0.0
Brazil	0	0.0	0	0.0	0:00	0.0
Chile	0	0.0	0	0.0	0:00	0.0
Colombia	0	0.0	0	0.0	0:00	0.0
Ecuador	0	0.0	0	0.0	0:00	0.0
Spain	1	5.0	11	1.7	13:00	1.0
USA (Hispanic production)	6	30.0	531	83.0	348:00	99.0
Mexico	**28**	**80.0**	**1579**	**71.0**	**1.807:00**	**84.0**
Peru	0	0.0	0	0.0	0:00	0.0
Portugal	0	0.0	0	0.0	0:00	0.0
Uruguay	0	0.0	0	0.0	0:00	0.0
Venezuela	0	0.0	0	0.0	0:00	0.0
CO-PRODUCTIONS (total)	**4**	**7.0**	**1.929**	**6.0**	**263:00**	**15.0**
Mexican co-productions	**4**	100.0	**231**	100.0	**263:00**	100.0
Co-productions among Obitel countries	**0**	0.0	**0**	0.0	**0:00**	0.0
TOTAL SUM	**35**	**100.0**	**1.629**	**100.0**	**2.158:00**	**100.0**

Source: Obitel Mexico

In 2018, the number of national premiere titles did not decrease, but the number of episodes did diminish and, therefore, the number of hours in respect of 2017. The reduction was due to the fact that the producers bet on shorter formats like series. In fact, that corresponds also to the model of the so-called "super series", which are nothing but serialized *telenovelas* that do not surpass 80 chapters. The same phenomenon happened both in national and Ibero-American titles. The logic of VoD systems seem to modify also the production, broadcasting and consumption logics of fictions on open television.

This year the premiere titles in the Obitel scope also decreased in number, since TV Azteca and Imagen Televisión did not broadcast any Brazilian *telenovelas*. The former company followed its decision of not broadcasting *telenovelas* anymore, while the latter dedicated entirely to the market of Turkish *telenovelas*.

Table 3. Formats of national and Ibero-American fiction

Format	National						Ibero-American					
	Titles	%	C/E	%	H	%	Titles	%	C/E	%	H	%
Telenovela	10	35.7	853	54.0	985:00:00	54.5	17	81.0	531	83.0	348:00	99.0
Series	14	50.0	412	26.1	455:00:00	25.2	3	5.0	11	1.7	13:00	1.0
Miniseries	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0	0:00:00	0.0
Telefilm	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0	0:00:00	0.0
Unitary	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0	0:00:00	0.0
Drama	4	14.3	314	19.9	367:00:00	20.3	0	0.0	0	0.0	0:00:00	0.0
Others (soap opera, etc.)	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0	0:00:00	0.0
Total	**28**	**100.0**	**1579**	**100.0**	**1807:00:00**	**100.0**	**7**	**20.0**	**350**	**29.0**	**351:00**	**100.0**

Source: composed by Obitel with national data provided by Nielsen Ibope México, S.A. de C.V. Software MSSTV, Base "Regular rating 5 domains + regular videotrack". Total TV programming in 2018.

This year, prime time lost the predominance of fiction broadcasts, since many series and *telenovelas* were placed in evening slot; some of them as a result of their C rating, just as it happened with *Malinche* and *Guardia García*, series from Once TV, but also with the series *Sin Miedo a la Verdad*, which was placed in the evening slot due to its subject matter on Televisa's star channel.

Table 4. The ten most viewed titles on open television

	Title	Country of original idea or script	Channel	Format/ genre	N. of chap./ ep. (in 2018)	Time slot	Rating	Share
1	*La Rosa de Guadalupe*	Mexico	2	Drama	125	Afternoon	17.11	27.10
2	*Mi Marido Tiene más Familia*	Korea	2	*Telenovela*	309	Prime time	16.55	24.36
3	*Tenías que Ser Tú*	Chile	2	*Telenovela*	87	Prime time	15.81	23.52
4	*Por Amar sin Ley*	Colombia	2	Series	95	Prime time	15.70	23.19
5	*Hijas de la Luna*	Colombia	2	*Telenovela*	82	Afternoon	15.16	24.87
6	*Amar a Muerte*	USA	2	*Telenovela*	22	Prime time	14.39	22.00
7	*Sin Miedo a la Verdad*	Mexico	2	Series	21	Evening	13.85	20.76
8	*Como Dice el Dicho*	Mexico	2	Drama	65	Afternoon	13.71	24.78
9	*La Jefa del Campeón*	Colombia	2	*Telenovela*	63	Afternoon	13.35	22.86
10	*La Piloto 2*	Colombia	2	Series	85	Prime time	12.29	18.40
Total productions: 10				**Foreign scripts: 7**				

Source: composed by Obitel with national data provided by Nielsen Ibope México, S.A. de C.V. Software MSSTV, Base "Regular rating 5 domains + regular videotrack". Total TV programming in 2018.

It should be underscored once again that the single-episode drama *La Rosa de Guadalupe* was the most viewed fiction, which has been happening for the last six years, although it does not always occupy the first place. The current preference centers on the fact that the topics are solved via the miracle of the Guadalupe Virgin and they focus on dramas or youthful issues that are real concern for its audiences.

It also should be highlighted that only three of the ten titles have a national script. Colombia is the country that most contributed with original ideas, with four scripts, followed by the USA and South Korea, the country where *Mi Marido Tiene más Familia* comes from.

Table 5. Audience profile of the ten most viewed titles on open television: gender, age, socioeconomic level

Titles		Channel	Gender %		Socioeconomic level %		
			Women	Men	AB	C	DE
1	*La Rosa de Guadalupe*	2	7.18	3.91	7.45	11.2	19.07
2	*Mi Marido tiene más Familia*	2	7.27	3.88	7.77	12.06	19.18
3	*Tenías que Ser Tú*	2	6.47	3.33	8.82	11.02	15.78
4	*Por Amar sin Ley*	2	6.74	3.55	9.68	12.06	14.92
5	*Hijas de la Luna*	2	6.57	3.07	7.47	11.05	7.39
6	*Amar a Muerte*	2	6.52	3.74	7.45	11.38	15.61
7	*Sin Miedo a la Verdad*	2	6.24	3.81	6.33	10.86	17.0
8	*Como Dice el Dicho*	2	5.77	3.05	6.0	9.23	15.7
9	*La Jefa del Campeón*	2	5.73	3.11	6.26	9.57	15.3
10	*La Piloto 2*	2	3.53	5.87	7.24	11.02	15.34

Titles		Channel	Age groups %				
			4-12	13-18	18-29	30-44	45+
1	*La Rosa de Guadalupe*	2	5.7	5.1	4.1	4.8	7.2
2	*Mi Marido Tiene más Familia*	2	5.3	5.1	4.0	4.6	7.7
3	*Tenías que Ser Tú*	2	4.4	4.6	3.5	4.0	6.9
4	*Por Amar sin Ley*	2	3.9	4.4	3.9	4.5	7.5
5	*Hijas de la Luna*	2	5.2	4.8	3.6	4.2	6.0
6	*Amar a Muerte*	2	4.5	4.2	3.7	4.9	6.9
7	*Sin Miedo a la Verdad*	2	4.6	4.3	3.6	5.3	6.9
8	*Como Dice el Dicho*	2	4.7	4.2	3.3	3.9	5.5
9	*La Jefa del Campeón*	2	4.8	4.0	3.5	3.6	5.6
10	*La Piloto 2*	2	3.4	4.3	3.7	4.4	6.2

Source: composed by Obitel with national data provided by Nielsen Ibope México, S.A. de C.V. Software MSSTV, Base “Regular rating 5 domains + regular videotrack”. Total TV programming in 2018.

The audience profile continues to be an adult woman of the middle class and lower-middle class, which, if carefully analyzed, clearly represents the audiences that center their attention the most on *La Rosa de Guadalupe*. However, this year the series *Por Amar sin Ley* was the most viewed in the different socioeconomic levels, perhaps because the subjects dealt with at the law firm had a direct correlation with corruption, violence and human right violations, which, unfortunately, have systematically affected the entire Mexican population, without making any distinctions.

3. Monitoring VoD in 2018

3.1. VoD in Mexico

There are up to 24 companies in Mexico providing VoD services. Among the most important companies are Netflix and Claro TV, according to data by The Competitive Intelligence Unit (CIU, 2018). The former company has 80.8% of the VoD market in the country, as opposed to Claro Video, owned by América Móvil, which has 14.6% of the market. This is so because it is offered for free to Telcel and Telmex clients, also owned by América Movil.

As to the rest of the platforms, CIU reports that Blim, owned by Televisa, has 2.7% of the market; HBO Go, 1.5%; and Fox Premium, 0.2% of the subscribers; although it is foreseen that the latter platform will have the biggest growth due to the fact that Fox was bought by Disney, which will launch Disney Play in 2019.

Chart 2. VoD services available in Mexico

Platforms		Total
VoD linked to open TV networks	Blim	**1**
VoD linked to pay TV networks	AXN, Channel A&E Play, Channel Sony, Cartoon Network Go, Fox Play, HBO Go, TNT Go, Watch ESPN	**8**
VoD linked to telecom companies	Claro Video, XView, Dish Móvil	**3**

VoD without links to TV networks	Cinépolis Klic, Amazon Prime Video, Crackle, Google Play, Microsoft Movies & TV, NBA TV, MLB Play, NFL Play, Netflix, Xbox Video, YouTube Red	**12**
Total:		**24**

Source: Obitel Mexico

3.2. Profits of VoD systems

Netflix reported that in 2018 it obtained profits of 1.211 billion dollars, more than double the 558 million obtained in 2017 (Parrot Analytics, 2019). As to its incomes, Netflix billed 15.794 billion dollars, also considerably higher than the 11.692 billion billed between January and December 2017. The rest of the VoD systems did not allow observing or analyzing their financial statements.

3.3. Analysis of VoD in 2018: national and Ibero-American premiere fiction

In the case of national fictions that were produced and broadcast on VoD platforms, the topic of drug traffic stands out, as one-third of the titles produced focus their narrative on the life of some drug dealer. This is the case of *El Chapo* and *Narcos: México*. Alternatively, other fictions refer to drug traffic as a central part of their plot, as is the case of *Ingobernable* and *Falco.*

Table 6. National and Ibero-American fictions broadcast on VoD systems in 2018

National premiere titles	Ibero-American premiere titles	Co-productions
Netflix – 7 national titles 1. *El Chapo 3* (series) *2. Club de Cuervos 3* (series) *3. Ingobernable 2* (series) *4. La Balada de Hugo Sánchez* (series) 5. *Yo Potro* (series) 6. *La Casa de las Flores* (series) 7. *Diablero* (series)	**Netflix – 8 Obitel titles** 1. *La Casa de Papel* (series, Spain) 2. *Tiempos de Guerra* (series, Spain) 3. *Las Chicas del Cable* (series, Spain) 4. *Edha* (series, Argentina) 5. *Fariña* (series, Spain) 6. *Alias J.J.* (series, Colombia)	**Netflix – 2 Obitel titles** 1. *Narcos: México* (series, Colombia/USA) 2. *Luis Miguel* (series, Mexico/USA)

Blim – 6 national titles 8. *Burócratas* (series) 9. *Blue Demon* (series) 10. *Súper X* (series) 11. *Sincronía* (series) 12. *Sin Miedo a la Verdad* (series) 13. *Dogma* (series) **Amazon Prime Video – 3 national titles** 14.*Un extraño enemigo* (series) 15. *Diablo Guardián* (series) 16. *Falco* (series)	7. *Paquita Salas* (series, Spain) 8. *Elite (*series, Spain)	
Total: 16	**Total: 8**	**Total: 2**

Source: Obitel Mexico

Prominent among this year's productions is *Luis Miguel, la Serie*, an autobiographical fiction produced by the singer himself (with other partners), which generated great expectations because it was the first time that he would speak publicly about his private life, which had always been followed by the shadow of whether his mother had disappeared or not. The series was made visible as a result of its capacity to impact the viewers (Orozco, 2014) because it sparked conversations and counter-narratives beyond Netflix's screen and it placed Luis Miguel at the center of the media showbiz coverage.

Table 7. Premiere fiction on VoD in 2018: countries

Country	Titles	%
NATIONAL (total)	**16**	**61.0**
OBITEL COUNTRIES (total)	**8**	**30.0**
Argentina	1	12.5
Brazil	0	0.0
Chile	0	0.0
Colombia	1	12.5
Ecuador	0	0.0
Spain	6	75.0
USA (Hispanic production)	0	0.0
Mexico	16	100.0
Peru	0	0.0

Portugal	0	0.0
Uruguay	0	0.0
Venezuela	0	0.0
CO-PRODUCTIONS (total)	**2**	**8.0**
Mexican co-productions	**0**	0.0
Co-productions among Obitel countries	**2**	100
TOTAL SUM	**26**	**100.0**

Source: Obitel Mexico

Mexico is one of Netflix's favorite countries for the production of original series. In 2018, seven fictions were produced directly and it participated in the production of the series *Narcos*: *México* and *Luis Miguel*; both, along with *El Chapo*, *Club de Cuervos* and *La Casa de las Flores*, ranked on the first five spots among the most viewed series, according to data published by Netflix at the beginning of 2019 (Parrot Analytics, 2019).

Table 8. Formats of national and Ibero-American fiction on VoD

Format	**National**				**Ibero-American**			
	Titles	**%**	**C/E**	**%**	**Titles**	**%**	**C/E**	**%**
Telenovela	–	–	–	–	–	–	–	–
Series	16	100	183	100	7	100	9	100
Miniseries	–	–	–	–	–	–	–	–
Unitary	–	–	–	–	–	–	–	–
Others	–	–	–	–	–	–	–	–
Total	16	100	183	100	7	100	99	100

Source: Obitel Mexico

Regarding other VoD systems, such as Blim and Amazon Prime, exclusive fictions were produced, and among the most viewed were *Enemigo Íntimo* and *Diablo Guardián*, which Televisa made exclusively for Amazon Prime. However, it was noteworthy because Blim is a VoD platform that belongs to Televisa. The decision – according to what some of the company's executives confirmed – has to do with the global fiction market.

4. Fiction analysis: open TV, VoD and transmedia expressions in networks

#Aristemo was one of the most frequently used hashtags during 2018. But why? It involved the unexpected opening up to sexual diversity on a Televisa *telenovela*, which had systematically integrated homosexual characters based on the use of stereotypes that turned out to be discriminatory (Franco and Orozco, 2018).

The second season of *Mi Marido Tiene más Familia* (the second most viewed in 2018) decided to place in its narrative the love story of two male teenagers: Aristóteles and Cuauhtémoc, hence the hashtag #Aristemo. The nickname became a trending topic among the fans of the story, who chose to fuse the teens' names to create on the social networks, mainly Facebook and Twitter, a tag that would allow them to speak about the romance. The story is not built on the basis of prejudice or morbid curiosity, but on the basis of recognizing a gender identity where these 15-year-old boys discover that they are different. The center of the story was reaching love from their identity. The final adaptation of the story caused the *telenovela* to be nominated to the Glaad Awards, granted by the association Gay & Lesbian Alliance Against Defamation.

To understand the expectations caused by the love of these two teens, it is enough to have a look at the conversations that users, mainly young people, held during the evolution of the plot. The moments that marked the most the chatter on the social networks about the *telenovela* were those related with the acceptance of gender identity, their getting out of the closet in front of the family, their confession of their romance between Aristóteles and Cuauhtémoc and, of course, the first kiss by the leading actors.

#Aristemo hashtag became a trending topic on the social networks. While the story was on the air, 1,296,000 tweets were generated and they reached 51,131,000 people, who kept talking about these characters (López, 2019). *Mi Marido Tiene más Familia* reached over 4 million viewers a day, which entails on the national level an audience greater than 10 million. In the last three months of its broadcast (November 2018 to January 2019), the Social Research Institute – belonging to Televisa – reported that it was thanks to the fans that #Aristemo ranked daily as a trending topic (López, 2019).

The most relevant points of the conversation generated occurred during the month of January, 2019, exactly on the days 4, 7 and 14, although the most significant day was February 24, when the *telenovela* finished with the promised kiss between the two teens**.**

The kiss that marked the end of the *telenovela*
Mi Marido Tiene más Familia

The *fandom* dedicated to these two protagonists was such that the transmedia dynamics were not in charge of the *telenovela*'s production, although it did cash in on the success of the story on the social networks, since it targeted the youngsters as the central characters of the *telenovela*, setting aside those who had been the protagonists since the first season. According to rating data, *Mi Marido Tiene más Familia* reached 16.55 points and ranked as the favorite TV fiction of the teenage (13-18 years old) and youth (19-29 years old) audiences – along with *La Rosa de Guadalupe*.[9]

A glance at the viewing of its episodes on YouTube reveals that, on average, each episode reached 5 million views. Besides, users edited parts of the *telenovela* to present only the love story between

[9] Prepared by Obitel with national data provided by: IBOPE AGB México, S.A. DE C.V. Software MSSTV, Base "*Rating* regular 5 domains + Videotrack regular". Total TV programming during 2018.

the two teenagers. These clips created by the account La Novelera[10] reached on average 1 million views per episode.

Reviewing the fans' profiles on Facebook, Twitter and Instagram related with the hashtag #Aristemo, the following were located: 250 fan pages on Facebook; 150 accounts on Twitter; and nearly 100 on Instagram, where there were also around 15 million mentions. A significant part of the messages thanks the protagonists for having given them the courage to confess their gender identity to their relatives or to not feel fear or shame to show their love in public. They did that by creating remixes of the scenes and dialogs that Aristóteles and Cuauhtémoc had on the *telenovela*.

In addition, the fans went beyond that to show the worth and relevance of the story, since they started posting the incidence of the *telenovela* on Twitter, case in point the account @AristemoFans,[11] with weekly cuts reflecting the fans' interaction with the *telenovela*. But that was not the only thing that conditioned the transmedia interactions of #Aristemo fans with the fiction, but also the dispute with other fandoms that claimed that the diversity couple on Mexican television was actually #Juliantina, a tag that fused the names Julia and Valentina, two young women (not teenagers) that showed their relationship openly on the *telenovela Amar a Muerte,* also by Televisa. In the plot they had already showed their love publicly, however it did not generate the euphoria caused by the so-called #Aristemo kiss.

The couples #Aristemo and #Juliantina

[10] See https://www.youtube.com/channel/UC1n0dk9e4viGaFtYkvaWIJw. Retrieved on March 11, 2019.

[11] See https://twitter.com/AristemoFans?s=17. Retrieved on March 12, 2019.

In the case of #Juliantina, this hashtag also maintained good presence on the social networks, generating 1 million tweets, whose reach was 31 million users. As in the case of #Aristemo, the fervor was caused by the narrative tension that stretched to the last episodes the kiss between the protagonists. On *Amar a Muerte,* there was not such a broad narrative construction about accepting gender identity, but rather both women were presented as people who had already incorporated their identity well; it was the materialization of their relationship and subsequent breakup that maintained the plot.

One of the harshest disputes between both fandoms occurred on the occasion of the 2019 TVyNovelas awards, where both couples were included as the "best kiss of the year". The triumph of #Juliantina caused the anger of #Aristemo's fans, who generated close to 5 million tweets on one day to express their discontent. Both stories announced their continuity: in the case of #Aristemo, with the making of a series; in the case of #Juliantina, a possible spin-off of *Amar a Muerte*.

The inclusion of diversity on both *telenovelas* did not only mean important progress for fiction within Televisa, a company that also broadcast a kiss between two young men on the single-episode drama *Como Dice el Dicho*. The inclusion of these subjects revealed that the young audiences have not entirely parted ways with TV fiction, because, if they perceive a story that appeals to them, they do not only dedicate their attention to it, but also expand the narrative to other media borders, where the center – beyond the fandom fights – is admitting that perhaps, for the first time, a part of the LGTBQ community has felt represented on Televisa's screens and contents.

5. Highlights of the year

The last album released by singer Luis Miguel was recorded in 2003. However, during 2018 he was the most listened artist on Spotify, with 6 million listeners a month. The singer owes his musical rebirth to the premiere, on April 22, 2018, of *Luis Miguel, la series,* which was co-produced by Gato Grande Productions, Netflix and Telemundo.

Running for 13 chapters that were released every Sunday, first by Telemundo and then by the VoD platform, *Luis Miguel…* became an Ibero-American success because it allowed observing the re-ascent of the idol to stardom and, at the same time, we were introduced to a complicated family life that included the labor exploitation that the artist suffered from his father during his childhood and adolescence, as well as the disappearance of Marcela, the singer's mother. These stories about his life had been kept a secret.

Netflix reported that every night the series, on average, was watched by 487 thousand people, which gathered to watch the release of every chapter on Sundays at 10 p.m. Who watched it? The platform indicated that mostly women did it, with 52%, as opposed to 48% of men, and that 51% were young people aged 19 to 44.

Nevertheless, González (2018) claims that the main success had to do with its capacity to provoke and viralize contents beyond the narrative and fiction, since people get set up on a televiewing experience of a second order (Orozco, 2014), where the series was not the relevant thing per se, but rather the series of memories and questions that it generated after each episode. Therefore, the conversations about the series were the favorite consumables for the creation of fanfics and memes that went viral in real time, thus expanding the narrative to other explicative frontiers, where the audiences and users put forth theories about, for example, "where is Marcela?".

Just on Twitter, during the 13 weeks of broadcasts, the hashtag #LuisMiguelLaSerie generated over 60 million tweets. After the high expectations that it left, Netflix has already announced a second season for the end of 2019. The idea of portraying the life of singer Luis Miguel results again from the boom of bioseries, which have been valid in Mexico since 2015. In 2018, fictions were also produced about singers José José and Alejandra Guzmán: the former was produced by Telemundo, while the latter was made by Imagen

Televisión. At the beginning of 2019, Televisa also presented a *telenovela* about actress Silvia Pinal, called *Silvia Frente a Ti*.

Narco-narratives of fiction on VoD platforms

Regarding VoD fiction, narcoseries made their appearance via two productions: *El Chapo* (3rd season) and *Narcos: México*. The former presented the ascent to power of the ex-leader of the Sinaloa Cartel, Joaquín Guzmán Loera, and his fall when he was extradited to the USA. In the case of *Narcos: México*, we could see the origins of Mexican drug traffic, with the extinct Guadalajara Cartel, headed by Miguel Ángel Félix Gallardo, starring Diego Luna. After its success, the series announced that it will have a second season. Both fictions ranked among the most viewed on Netflix in 2018.

Goodbye to the telenovelas

TV Azteca, the second most important network in Mexico, abruptly announced not only that it would stop making *telenovelas*, but also that its fictions would stop being aired by its main channel, Azteca Uno. The director, Benjamín Salinas, explained: "They [the *telenovelas*] are not anymore something that the public wants to continue watching. We have made them for 20 years, now we have to take a step back and look at what people want and produce it". He also added: "we are conducting great anthropological studies, we have been doing that for eight months in households to find out what they consume, to understand how people think, how Mexicans think and, from there, we will be able to generate content".[12]

Among the reality shows that have increased its ratings are: *La Academia*, *Exatlón* and *Máster Chef*. Recently, Azteca announced the purchase of the franchise *La Voz México*, which had been broadcast exclusively by Televisa since 2014.

[12] See https://vanguardia.com.mx/articulo/tv-azteca-dice-adios-las-telenovelas.

Abandoning the *telenovelas* did not mean leaving behind fiction production, since, through the company Dopamine, the biblical series *María Magdalena*, which gives voice to the version of María around Jesus's life, was launched in 2019.

6. Theme of the year: television distribution models by the internet: actors, technologies, strategies

The audiovisual industry has changed in the last few years in such a way that it poses a challenge for the scholars that study the field and try to "keep up with" these transformations, describe and explain them. We know there are exchanges and interconnections among the different global and local networks. Thanks to these interconnections, the road is more accessible for the distribution and consumption of online contents. Up to just a few years ago, the contents were distributed and viewed only by television, but today they also circulate through multiple devices. The solution is producing contents that are consumed through a wide range of media and platforms (the industry calls them "clients"), in the modality "when the audiences desire it and where they want it", with the advantage that the consumption of contents is offered according to the profile of each user.

All the above may sound simple, but it is not. A complex infrastructure and organization (hardware and software) are required within the corporations that distribute contents, as well as alliances with key "actors", Big Data management for the users' analysis and knowledge, promoting content consumption, their adaptation to view them, information managers, etc.

There is very little knowledge about how companies operate and interconnect with one another (both local and global ones), about who forms alliances and how they cooperate – and compete – with each other. As Galperin points out (2016: 631), internet traffic and market conditions have favored the search for new interconnection arrangements among the companies that work in the market to control costs and optimize the delivery of contents to the users.

In this section we present some facts that just allow outlining the complex field of industry regarding television distribution on the internet. The outline of the map we present is not complete yet, given that the information is still not clear.

The data we present in Table 9 refer to the corporations that offer TV contents on the internet, the companies or media or telecommunications groups they belong to, their level of dominance in the market, and their country of origin. Most of them come from the USA (17 of 24; five are Mexican; one is Mexican/USA; one from Singapore, South Korea, Indonesia and the USA). That is, 70% of the companies are from the USA and almost 21% are Mexican.

OTT regulation

In Mexico OTT operation has not been regulated yet. In European countries domestic productions are protected from the invasion of US productions mainly, and in some Latin American countries the operation has already been regulated. Mexico has hardly launched an initiative for a new bill at Congress to regulate contents. It will be requested that platforms such as Netflix, Claro Video and Blim (the main ones) include national cinema and series in at least 30% of their contents. The new government shall undertake this issue and it is foreseen that it will be a complex issue, since many of the companies are not established in the national territory (Ponce, 2018).

Table 9. Companies that provide online TV content

Name of the corporation/ head office	Economic sector	Modality of participation in the network infrastructure	Level of dominance in the market	Public/private Nationality
1. Netflix	Silicon Valley	Web portal/app	First SVoD distributor in Mexico, with 80.8%	Private/USA
2.Claro Video/ América Móvil	Telecommunications/América Móvil	Web portal/app	14.6% of the market, second largest national distributor	Private/Mexico

3. Blim/Televisa	Mass media / telecommunications	Web portal/app	SVoD. Covers 2.7 of the market. Third national distributor.	Private/Mexico
4. Amazon Prime Video/ Amazon	Silicon Valley	Web portal/app/ cloud	300 thousand users	Private/USA
5. HBO Go/ ATT/ Time Warner	Mass media / HBO	Web portal/ cable TV	1.5% of the market (2.3 million)	Private/USA
6. TNT Go/ Turner	Turner Network Television (Time Warner Company)	Web portal/app	No data	Private/USA
7. Blue to Go/ Sky/ Televisa	Telecommunications /Sky	Web portal/app	No data	Private/ Mexico
8. AXN/Sony Pictures Entertainment	Mass media	Web portal/app/ cable and satellite TV	No data	Private/ USA
9. Dish Móvil/ MVS Comunicaciones/Echo Star Corporation	Telecommunications	Web portal/app	4% of the market (satellite TV). Data about number of users via Dish Móvil are unknown.	Private/USA-Mexico
10. A&E Play/ HBO Latin American Group	Mass media	Web portal/app	It has 32 million subscribers in Latin America.	Private/USA
11. Sony/Sony Pictures Entertainment/HBO Latin American Group	Mass media	Web portal/app/ cable and satellite TV	No data in Mexico	Private/USA
12. Cartoon Network Group/Time Warner Company/Turner Latinoamérica	Mass media	Web portal/app/ cable and satellite TV	No data	Private/ USA
13. Fox Play/ Disney	Mass media	Web portal/app/ cable and satellite TV	No data	Private/USA
14. ESPN Play/ ESPN/Walt Disney Company & Hearts Corporation	Mass media	Web portal/app/ cable and satellite TV	No data	Private/USA

15. MX Play/ Sistema Público de Radiodifusión del Estado Mexicano	Mass media	App	Free. No market data	Public /Mexico
16. Xview/ Megacable	Telecommunications	App	Projected to conclude 2018 with 600 thousand users	Private/Mexico
17. Crackle/ Sony Pictures Entertainment	Mass media	Cable and satellite TV /App	Stopped providing services in April 2019	Private/USA
18. Google Play/Google	Mass media (online store)	Web portal/app	No data	Private/USA
19. Microsoft Movies & TV/ Microsoft	Mass media	Web portal	No data	Private/USA
20. NBA TV/ Warner Media	Mass media	Web portal /pay TV/app	No data	Private/USA
21. MLB Play/ Mayor League Baseball	Mass media	Pay TV/app	No data	Private/USA
22. NFL Play/ Roger Goodell	Mass media	App	No data	Private/USA
23.YouTube Red/Alphabet, Google's subsidiary	Mass media	Web portal /app	No data	Private/USA
24. Viki/Rakuten Group	Mass media	Web portal /app	No data	Private/Singapore, San Francisco, Indonesia, South Korea

Source: Obitel Mexico

Next, the objective is to present the information that we located about the most important corporations operating in Mexico and some of the companies with whom they establish interconnections to provide online TV content for their users.

Table 10. Internet television infrastructure in Mexico

1) *Most important internet portals*: Netflix, Claro Video (América Móvil, Mexico), Blim (Televisa, Mexico), Amazon Prime, iTunes (Apple), Google Play, YouTube Premium (YouTube), Play Station Store, Xbox Store, Microsoft
2) *Internet providers in Mexico* (ISPs): Prodigy (Telmex), Axtel, Izzy, Megacable, TotalPlay, Cablemás, Ultranet, Altán Redes (shared networks)
3) *Content distribution networks*: Amazon AWS (Amazon Web Services), Kio Networks (Mexico), Internet Society, LAC-IX, Lacni, Open Connect, EC2, S3, Microsoft Silverlight, Azure Stack (Microsoft)
4) *Digital intermediaries*: Amazon AWS (data manager, Big Data), DynamoDB, Cassandra (USA)

Source: Made by the Obitel Team.

1) *The most important internet portals* (platforms): mainly US companies participate and only two Mexican ones: Blim and Claro Video. It means there is an overwhelming majority of US corporations in the internet content distribution infrastructure. 2) *Internet service providers in Mexico (ISPs)*: The main internet providers in Mexico are Prodigy, from Telmex (Grupo Carso), Axtel, Izzy (Televisa), and Total Play (Grupo Salinas). All of them are private and belong to the groups that monopolize telecommunications services and television content production in Mexico. Without an internet connection, reception and distribution of contents that way would not be possible. US companies (we do not know if there are some from other countries) establish alliances with the local internet providers to place their contents on these ISPs. 3) *Content distribution networks*: one of the main aspects for these platforms is having ideal management of information data (cloud) and software that handles the playback of contents. It is important to highlight that there is a Mexican company, Kio Networks, acting as information manager (large corporations such as Netflix use Amazon's AWS[13]); Mega-

[13] Cinépolis Klic, a Mexican SVoD company with cinema content, has an alliance with this enterprise. Retrieved on March 12, 2019 from https://lifeinbits.net/2017/09/26/cinepolis-klic-mejora-la-experiencia-usuarios-amazon-web-services/.

cable (content distributor and internet provider from Mexico) uses the national company.

Alliances in Mexico so as not to depend on the USA or Canada

Citi, Internet Exchange Consortium, is a civilian non-profit association, founded in 2012, which was established to install the first IXP (Internet Exchange Point) in Mexico and obtain benefits in terms of efficiency in the communications exchanged through it and, thus, not depend on US companies. At present, the member organizations are Corporación Universitaria para el Desarrollo de Internet (Cudi, University Corporation for the Development of the Internet), Iusacell, Kio Networks, Megacable, Nextel, RedIT and Transtelco, all of them private. Kio Networks was founded with 100% Mexican capital and its objective is that internet communications do not to depend on US and Canadian companies for their processing. We do not know whether other online TV platforms, besides Megacable (which offers XView), have joined.

Finally, other key aspects in this ecosystem are: 4) *digital intermediaries*: that is, the companies that provide user analysis by means of the use of Big Data and other companies that advertise the contents. With data about the users, strategies are implemented, so that they receive "a menu based on their tastes" on the portal they are subscribed to. Thus, they view personalized contents and advertising, in keeping with the "analysis" conducted in their profiles. As to the advertising of contents and use of Big Data, Netflix uses decentralized data bases, such as Dynamo DB and Cassandra, which store data from each user profile and the contents they have watched. Thus, Netflix analyzes the information of each one and knows what content was viewed, where it happened and which device was used for that. The algorithms that manage the online TV platforms, such as Netflix, have "a menu" that "is predesigned to break preconceived notions" and for the users to find series that they love (Lucas, 2017).

We did not locate information about who handles the algorithms in the different corporations that operate in Mexico, nor who manages them at Claro Video or Blim, which are the platforms with the largest number of users. Claro Video owns Claro Drive (cloud), providing an information storage service for its subscribers. We do not doubt that they have a large storage capacity on the cloud for their contents. Among all the corporations with online television content, only one provides the services for free, and it comes from a public medium (MX Play).

In the search we conducted about the platforms mentioned in Table 9, we found that there is not a lot of information about the four key points mentioned previously. We managed to locate minimal information, therefore, this report is still incomplete and in process of construction.

Finally, in order to clarify the inner workings of the infrastructure that interconnects the networks, so that we can see the online contents, we believe that it is illustrative to present the way Netflix operates as an example. According to the website www.xatara.com, Netflix uses two different clouds: Amazon AWS and Open Connect. To Netflix the “client” is the user interface to surf the net and play videos (an app, iPhone, Android, a website from a computer, a smarTV, Xbox consoles, etc.). Netflix controls each of these clients through its device. By means of Amazon AWS (using the backend server), it prepares the incoming video and, once the user pushes *play*, what follows is managed by Open Connect, which is the content distribution network (CDN). It is well known that Netflix has AWS in three regions of the world (two in the USA and another in Ireland). The advantage of this is that, if one of them fails, there are two others and the *clients* can be provided with a service *from outside* the region where they are. In order to enable its viewing, each content must go through an entire complex processing process. Once it is prepared, each video is copied from a central location and distributed on a network to be stored all over the world. The central location where Netflix videos are stored is known as S3. The video that is to be viewed must be *located* as close to the users as possible, for the moment when they want to watch it. Each location where a computer stores a video is called "point of presence" (PoP), which are physical locations that give access to the internet and that house several servers. Netflix created its own distribution network, called Open Connect, as well as storage "computers", called Open Connect Appliances (OCAs). Some store all Netflix contents and others just a small portion thereof.

When we as users want to watch some content through Netflix and we push *play*, we view them through streaming from an OCA that is near us. Netflix has more than one thousand locations in the world, while Amazon and YouTube have their own global video distribution network. The interconnections for operation that Netflix establishes with Mexico are made with the local ISPs that agree to place their OCAs on their networks, and Netflix also places them on internet exchange points (IXPs). This way, on a local level, in each region, the main actor for Netflix is the internet service provider (ISP) that allow it to have on its network an OCA located near its users. The Internet exchange is presented from one network to another: what internet does is to interconnect networks. But we believe that this is still more complex than it seems to be. So far, we have referred this case that illustrates how the world seems to work inside one of these online content platforms[14], at least the most successful one worldwide.

Final considerations

As it could be observed, the panorama presented here is a partial one, but undoubtedly there are few actors and corporations controlling the online distribution of content. There is no clarity, above all in national companies: it was difficult to obtain information about how they operate and about their alliances. These companies are

[14] Information from https://www.xataka.com/streaming/la-compleja-infraestructura-detras-de-netflix-que-pasa-cuando-le-das-al-play.

actually lesser players if we place them in perspective with world-class players. It was recently announced that there are new alliances at the door: due to the fact that Televisa's Blim has been a failure, the company has established agreements with Netflix to "return" its contents to this platform.

We believe that the business is also in the "devices" or the technology necessary to consume content (hardware, software) and in who manages their information and our preferences. The central point is, in Orwellian terms, "in the eye that sees us – and that we cannot see – and is watching us". The large corporations know our tastes, the places from where we access the contents, and they can even mold our preferences. This "innocent" world of entertainment is actually a monster. The strings are moved by a few very powerful actors; the national companies depend ever more on global corporations to circulate their contents, and the global corporations, in turn, depend on the local ones. A world in which interconnections and alliances are interwoven, and we participate jointly – as Aldoux Huxley would say – in this "happy" world.

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6
Peru: fiction with no direction[1]

Authors:
James A. Dettleff, Giuliana Cassano, Guillermo Vásquez[2]

Team:
Thalía Dancuart, Nataly Vergara, Brunella Bertocchi,
Mary Bustinza, María Isabel Ato, Lissi Torres, Sarah Rueda,
Kimberli López, Priscilla Castro, Renzo Miranda

1. Peru's audiovisual context in 2018

In previous yearbooks we explained how Peruvian political crisis affected the production stability. The crisis worsened when President Kuczynski resigned, in March 2018, being replaced by Vice President Martín Vizcarra, who decided to confront the opposition – which had control of Congress – and propose central reforms. Journalistic researches uncovered corruption in the judiciary, triggering a new crisis, which slightly weakened the opposition and gave strength to the new government. These researches led to the imprisonment of political leaders and the fall and flight of several judges, generating massive mobilizations that supported the President's effort to fight corruption. In this environment of instability, Justicia TV station broke audience records when broadcasted the pre-trial detention request for the opposition leader, Keiko Fujimori, and eleven people from her environment, charged with acts of corruption and organized crime. The fiction shows continued their pro-

[1] We thank the support of Kantar Ibope Media, which kindly provided us with the rating information used in this research. This work was possible thanks to the support of the Vice Rector of Research and the General Direction of Research of Pontificia Universidad Católica del Perú.

[2] Tenured professors of Pontificia Universidad Católica del Perú.

duction rhythm, but without knowing whether to bet on new stories, recycle previous successes, maintain old marketing structures, or dedicate themselves to enter what is supposed to be the television of the future. The "confused fiction" – title of our previous yearbook chapter – continues, without establishing a clear course of how to face the current challenges, thinking about adapting to what is coming, maintaining traditional schemes while looking to face the challenge of attracting – and, above all, achieve profitability – the audience that increasingly consumes less television on the classic television screen.

Amid this uncertainty, on October 24 Víctor Falcón – one of the most important screenwriters of recent years – died, which means a blow to the Peruvian melodrama. Falcón was the creator of the most successful stories of Del Barrio Producciones, and his departure generates doubts about what will happen to the narrative lines in the country.

1.1. Open television in Peru

Chart 1. National broadcasting networks/stations in Peru

Private networks/stations (5)	Public networks/stations (1)
Latina (Channel 2) América Televisión (Channel 4) Panamericana Televisión (Channel 5) ATV (Channel 9) América Next (Channel 13)	TV Perú (Channel 7)
TOTAL NETWORKS/STATIONS = 6	

Source: Observatorio Audiovisual Peruano (OAP)

In this research, no changes were observed in terms of ownership or grouping of the national broadcasting stations. As in previous years, the only station that had any change is the one broadcasted in frequency 13 in Lima, which – as reported previously – is a subsidiary of ATV and has undergone several changes in its management and names. The 2018 modification has been its name – it is called now America Next –, which has also meant becoming a broadcaster of older shows of América Televisión, the company that signed an agreement with ATV at the beginning of 2016.

The most important change in broadcast management happened in América Televisión, the fiction content leading producer in Peru, where the announced transition between Eric Jurgensen – the head of the broadcasting company since 2003 – and Pablo Massi took place at the beginning of 2018. Although there have been no differences in the programming policy of the station, Massi has taken on the challenge of changing television production, programming and marketing from television sets to different platforms and with different objectives, a theme that we will develop later.

One of the most relevant aspects of Peruvian television in 2018 has been the agreements that the state-owned TV station, TV Perú, signed with Spain's RTVE, Italy's RAI and England's BBC Studios to co-produce content and produce Peruvian versions of their shows. Likewise, the Peruvian state-owned company signed different agreements so its signal can be broadcasted in the European Union and the United Kingdom. The station, which is more dedicated to the information sector and in recent years had little fiction production, started interesting fiction projects in 2018, which we will see in the section on the highlights of the year.

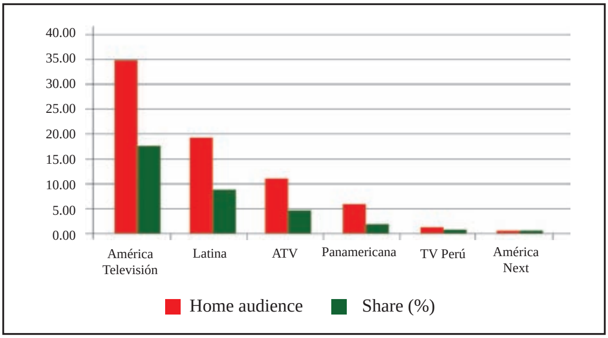
Although it is not one of the broadcasting stations of national reach, it is worth mentioning the turn that Willax has given towards the young audience, something that had already been noted in previous yearbooks. Adding to its Asian fictions, it has now spread to different genres targeting a younger audience.

Graph 1. TV audience and share by network

Network	Home audience	Audience (%)	Share (%)
América Televisión	8	42.6	22.9
Latina	4.7	25.0	13.5
ATV	3	16.0	8.7
Panamericana Televisión	1.9	10.1	5.3
TV Perú	0.9	4.8	2.5

América Next	0.3	1.6	0.8
TOTAL	**18.8**	**100**	**53.7**

* Share does not add 100% because it lacks all other broadcasting stations, cable and VHS/DVD.

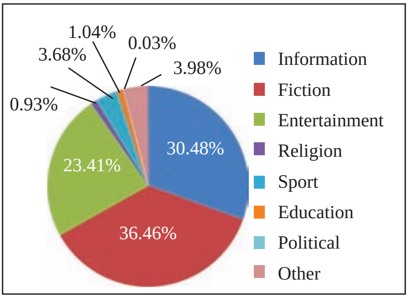


Source: OAP and Kantar Ibope Media

Audience fluctuations continue, although without modifying the position each station has in the ranking. América Televisión significantly expanded its audience (six percentage points), while Latina and ATV dropped two percentage points each compared to the previous year. Panamericana Television and TV Perú rose slightly, while the instability of the station known today as America Next made it go down from 3.9% (2017) to 1.6%. Despite the rise of América Televisión and other stations, the graph shows the decreasing trend of the broadcasting television audience, which went down 1.3%, while the share shows a decline of 4% compared to 2017.

Graph 2. Genre and hours broadcasted on TV

Broadcasted genres	Broadcasted hours	%
Information	16020:00:00	30.48
Fiction	19166:00:00	36.46
Entertainment	12305:00:00	23.41
Religion	487:00:00	0.93
Sport	1932:00:00	3.68
Education	544:00:00	1.04



Political	13:30:00	0.03
Other	2092:30:00	3.98
TOTAL	**52560:00:00**	**100**

Source: OAP

Fluctuations in terms of genres broadcasted have not been noticeable this year either. Fiction has meant 1% less on screen compared to 2017, but it remains in the boundaries shown in recent years, while information has increased slightly. The most notorious changes are in entertainment, which shows a decline of 3.6% compared to the previous year, and the increase in education by 1.3%, mainly due to the boost that TV Perú has given to this type of shows.

In 2018, Peruvian national soccer team returned to the World Cup competition, after 36 years of absence. That explains the rise of close to 400 hours in sports, although they only mean an increase of 0.6%. Nevertheless, it should not be ignored that there were a lot of shows dedicated to the World Cup and to the Peruvian national team on cable stations.

1.2. Pay TV

Movistar continues to be the main paid provider in the country, sharing the bulk of the market with Claro TV and DirecTV. The entrance of other providers such as Amazon Prime Video did not have the expected reception and they are far behind of the most classic cable stations. The programming offered by these providers is similar to that of other Ibero-American countries, except for local stations. As for Netflix, it is not possible to have figures that tell the exact penetration of its service, although it has reached an agreement with Movistar, so that Movistar users may contract and pay for Netflix service through the cable company.

1.3. Advertising investments of the year: in TV and in fiction

It has not been possible to obtain data on the amounts of investment for 2018, since Kantar Ibope Media cannot verify the payments made by hired advertisement. This is because many broadcasting companies publish costs for advertising, but they negotiate different rates with different companies. Even so, Kantar Ibope Media has established investment percentages, which we can compare with previous years.

Advertising investment in television continues to fall, a trend that started in 2015, and, although it still maintains a considerable percentage of investment (61.4% in 2018), this is a reduction of 1.5% compared to 2017, being far from the 79% it meant in 2014. This is even more dramatic if we remember the World Cup happened in 2018, which usually entails a higher expense of advertising by the companies. This could make us believe that, without sports fever, the fall in advertising investment in television could have been more significant.

Cable TV advertising continues to grow, slowly but without setbacks, reaching this year 18.5%, which means 2.2% more than in 2017 and 3.6% more compared to 2016. There has also been an increase in outdoor advertising investment, which for 2018 represented 6.5% of the advertising pie. It means that this year more advertising was invested in the streets than in written press and radio (6.3% and 6.2%, respectively), which continue their slow decline in advertising participation.

The national fictions have maintained their product placement strategies, not only locating products within their fiction, but also creating scenes where the characters interact or demonstrate the benefits of the product or service, or as a separate element, just before going to the commercial breaks. As we have been reporting in previous years, these strategies have been increasing in Peruvian fictions since 2012.

In the case of advertising investment in VoD systems and the profits they generate, there is no information available, since in Peru they are accessory and repetitive products of their main stations. However, according to data published by América Televisión, advertising investment for 2018 in digital media accounted for 13%, while advertising on broadcasting television and cable obtained the remaining 87%.

1.4. Merchandising and social merchandising

The trend recognized in Peruvian fiction in recent years continued in 2018, including as fiction stories issues that affect Peruvian society. Del Barrio Producciones fictions have dealt with the issue of violence against women – one of the most frequent problems in Peruvian society –, having female characters as victims of violence. In two fictions this stood out (*Colorina, Madre por Siempre* and *Ojitos Hechiceros 2*), with characters beaten by their spouses and also enduring harassment in their workplace. The harassment scenes endured by the main character of *Ojitos Hechiceros 2*, as the violence experienced by Belén, co-star of the same *telenovela*, led to active campaigns and responses on social networks, where viewers rejected what was happening to the characters and commented about what should happen, creating a resemblance with what was occurring in Peru's society.

The networks were also used to ask people about the decisions these characters should make, as well as the case of whether a character should accept abortion pills of uncertain origin in *Mi Esperanza*. Surveys were created so people could vote for the best decision. Although the survey result did not determine the future of the story, it generated a lot of discussion and awareness in networks about these situations. In other cases, fictional characters (acting as lawyers, doctors, legal counselors) answered and explained the options that the *telenovela* characters have in the different situations they had to face.

Another outstanding example is the exploitation and working conditions in the plot of *Colorina, Madre por Siempre*, a theme that was included after some workers died when they were locked up by their employers, and a fire broke in a commercial area of Lima. This fact started a big discussion about the working conditions of many Peruvians, and the *telenovela* included a situation of exploitation, contributing to the discussion of the topic.

1.5. Communication policies

Two legal resolutions that affected television created criticism and arguments in 2018. In June, Congress approved – despite the rejection of the Executive Branch – Law n. 2,133, which forbid the Government from advertising in private media. This meant a reduction of resources in several media, affecting mainly the smallest ones, but also generated problems for the government to advertise health campaigns, prevention campaigns, position announcements, etc. The Executive Branch filed a complaint at the Constitutional Court, which was finally solved in October, declaring the law unconstitutional and leaving it without effect.

In November, the Transport and Communications Ministry announced that it planned to modify the "virtual channel" (the number with which the stations are tuned on TV sets) of the networks broadcasting on DTT. This brought up several protests from the companies that currently broadcast their digital signal on the virtual channels 1, 3 and 6, because they consider that the decision is arbitrary and intends to benefit the traditional stations, which broadcast on the virtual channels 2, 4, 5, 7 and 9. The modification remains unimplemented, but it is a sensitive issue for those companies that wish to compete with large television companies.

In Peru, DTT is currently broadcasted in 12 cities in the country, reaching a big part of the territory, and there are 149 transmission frequencies, 107 being in the hands of the five main broadcasting companies of Lima, while 17 belong to other broadcasting companies, five to educational institutions, and 20 to religious institutions. Any modification of the virtual channel – without modifying the numbers of traditional stations – is observed as an act of preference to the big broadcasting companies and a form of discrimination towards the small companies that start their activities on the DTT.

1.6. Digital and mobile infrastructure

Unlike previous years, there were no major changes in mobile connectivity or phenomena on the internet. The most relevant for Peru was the fact that the *telenovela Ojitos Hechiceros* became the most searched fiction on Twitter, a network that, according to a study by Kantar Ibope Media, is used by one in ten Peruvians who have access to the internet. The same study indicates that 96% of Twitter users in Peru access this network through their smartphones and that 20% access it while watching television, where the largest number of comments are made when watching television news.

1.7. Independent producers

The strength and dynamism that the independent producers had in the first years of the decade little by little have been reduced. Del Barrio Producciones is still the only one that has a constant production, thanks to the good relationship with América Televisión, allowing it to vary its themes and propose new projects. Other producers – like Pro TV – continue to produce second or third parts of their fictions, as long as they are successful. But it is not certain that they continue in this dynamic if any of their products do not achieve the expected audience results. It was the case with Iguana Producciones, whose bet on the revival of *Torbellino* – a successful *telenovela* of the 1990s – ended in low ratings and the absence of plans for future projects.

The broadcasting stations have regained their production capacity and returned to produce more fictions from their facilities, as it was until the beginning of this century. On the other hand, the growing interest that TV Perú has shown to have fiction has allowed some producers to enter the market with concrete products – animation microshows –, although the continuity and growth possibilities of these companies (Polirama and Fónica Studios) must be observed after their shows finish their seasons.

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

Table 1. Fictions broadcasted in 2018 (national and foreign; premieres and reprises; and co-productions)

PREMIERE NATIONAL TITLES – 12 **América Televisión – 7 national titles** 1. *Colorina, Madre por Siempre* (*telenovela*) 2. *Cumbia Pop* (*telenovela*) 3. *De Vuelta al Barrio* (soap opera) 4. *Mi Esperanza* (*telenovela*) 5. *Ojitos Hechiceros* (*telenovela*) 6. *Ojitos Hechiceros 2* (*telenovela*) 7. *VBQ: Empezando a Vivir* (*telenovela*) **Latina – 2 national titles** 8. *De Millonario a Mendigo* (*telenovela*) 9. *Torbellino: 20 Años Después* (*telenovela*) **TV Perú – 3 national titles** 10. *Ciudad Jardín* (series) 11. *El Último Bastión* (miniseries) 12. *Martina y Rigoberto* (series) **PREMIERE FOREIGN TITLES – 27** **Latina – 7 titles** 1. *Amor a Vida* (*telenovela* – Brazil) 2. *Heidi* (*telenovela* – Argentina) 3. *José, el Príncipe de la Canción* (miniseries – Mexico, USA) 4. *Josué y la Tierra Prometida* (*telenovela* – Brazil) 5. *Justicia* (miniseries – Brazil) 6. *Mujeres Rompiendo el Silencio* (miniseries – Mexico) 7. *Rata de Dos Patas* (*telenovela* – Mexico, USA) **América Televisión – 9 titles** 8. *Caer en Tentación* (*telenovela* – Mexico) 9. *La Jefa del Campeón* (*telenovela* –	**REPRISES – 97** **Latina – 23 national titles, 2 foreign titles** 1. *Chacalón* (miniseries – Peru) 2. *Chapulín el Dulce* (miniseries – Peru) *3. El Gran Reto* (miniseries – Peru) 4. *Los Jotitas* (miniseries – Peru) 5. *Néctar en el Cielo* (miniseries – Peru) 6. *Guerreros de Arena* (miniseries – Peru) 7. *Por la Sarita* (miniseries – Peru) 8. *Viento y Arena* (miniseries – Peru) 9. *Augusto Ferrando de Pura Sangre* (miniseries – Peru) 10. *Camino a Casa* (miniseries – Peru) 11. *La Fuerza Fénix* (miniseries – Peru) 12. *Lobos de Mar* (miniseries – Peru) 13. *Los Diablos Azules* (miniseries – Peru) 14. *Misterio* (miniseries – Peru) 15. *Pide un Milagro* (miniseries – Peru) 16. *Sabrosas* (miniseries – Peru) 17. *Yuru, Princesa Amazónica* (miniseries – Peru) 18. *La Paisana Jacinta* (series – Peru) 19. *Pataclaun* (series – Peru) 20. *Comando Alfa* (series – Peru) 21. *El Profe* (series – Peru) 22. *Los del Barrio* (*telenovela* – Peru) 23. *Camote y Paquete* (miniseries – Peru) 24. *Hasta que te Conocí* (series – Mexico) 25. *La Mujer en el Espejo* (*telenovela* – Colombia) **América Televisión – 4 national titles, 7 foreign titles** 26. *Al Fondo Hay Sitio* (soap opera – Peru) 27. *Amores que Matan* (series – Peru) 28. *Los Amores de Polo* (miniseries – Peru) 29. *Solamente Milagros* (series – Peru) 30. *El Chavo del Ocho* (series – Mexico) 31. *El Privilegio de Amar* (*telenovela* – Mexico) 32. *La Gata* (*telenovela* – Mexico)

Mexico) 10. *La Rosa de Guadalupe* (series – Mexico) 11. *Me Declaro Culpable* (*telenovela* – Mexico) 12. *Mujeres de Negro* (series – Mexico) 13. *Papá a Toda Madre* (*telenovela* – Mexico) 14. *Sin tu Mirada* (*telenovela* – Mexico) 15. *Tenías que Ser Tú* (*telenovela* – Mexico) 16. *Y Mañana Será Otro Día* (*telenovela* – Mexico) **ATV – 3 titles** 17. *Partes de Mí* (*telenovela* – Brazil) 18. *Por Siempre* (*telenovela* – Brazil) 19. *Silvana sin Lana* (*telenovela* – USA) **América Next – 8 titles** 20. *Antes que Muera Lichita* (*telenovela* – Mexico 21. *El Chema* (series – Mexico, USA) 22. *El Señor de los Cielos 5* (*telenovela* – Mexico, USA) 23. *La Querida del Centauro* (*telenovela* – Mexico, USA) 24. *Señora Acero 3* (*telenovela* – Mexico, USA) 25. *Señora Acero 4* (*telenovela* – Mexico, USA) 26. *Sin Senos No Hay Paraíso 2* (*telenovela* – Colombia) 27. *Tres Caínes* (*telenovela* – Colombia)	33. *La Rosa de Guadalupe* (series – Mexico) 34. *María la del Barrio* (*telenovela* – Mexico) 35. *María Mercedes* (*telenovela* – Mexico) 36. *Marimar* (*telenovela* – Mexico) **Panamericana Televisión – 6 national titles, 11 foreign titles** 37. *Clave Uno: Médicos en Alerta* (series – Peru) 38. *Esposos pero Tramposos* (miniseries – Peru) 39. *La Paisana Jacinta* (series – Peru) 40. *Pataclaun* (series – Peru) 41. *Somos Family* (series – Peru) 42. *Taxista Ra* (series – Peru) 43. *Bellas Calamidades* (*telenovela* – Colombia) 44. *El Cartel de los Sapos* (*telenovela* – Colombia) 45. *El Cuerpo del Deseo* (*telenovela* – Colombia) 46. *Pablo Escobar, el Patrón del Mal* (*telenovela* – Colombia) 47. *Pasión de Gavilanes* (*telenovela* – Colombia) 48. *Sin Tetas No Hay Paraíso* (*telenovela* – Colombia) 49. *Victoria* (*telenovela* – Colombia) 50. *Tierra de Pasiones* (*telenovela* – USA) 51. *Marina* (*telenovela* – Mexico) 52. *Mujeres Rompiendo el Silencio* (series – Mexico) 53. *Rata de Dos Patas* (*telenovela* – Mexico) **ATV – 21 foreign titles** 54. *Al Límite* (miniseries – Argentina) 55. *Criminal* (miniseries – Colombia) 56. *Chespirito* (series – Mexico) 57. *Como Dice el Dicho* (series – Mexico) 58. *El Chapulín Colorado* (series – Mexico) 59. *Historias de Sexo de Gente Común* (series – Argentina) 60. *Mujeres Asesinas* (series – Argentina) 61. *Decisiones extremas* (series – Colombia, Mexico, USA, Puerto Rico)

	62. *A Cada Quien su Santo* (series – Mexico) 63. *La Vida Es una Canción* (series – Mexico) 64. *Lo que Callamos las Mujeres* (series – Mexico) 65. *Mujer, Casos de la Vida Real* (series – Mexico) 66. *Amor Real* (*telenovela* – Mexico) 67. *Amores Verdaderos* (*telenovela* – Mexico) 68. *Destilando Amor* (*telenovela* – Mexico) 69. *Hasta el Fin del Mundo* (*telenovela* – Mexico) 70. *La Madrastra* (*telenovela* – Mexico) 71. *Qué Bonito Amor* (*telenovela* – Mexico) 72. *Salomé* (*telenovela* – Mexico) 73. *Teresa* (*telenovela* – Mexico) 74. *Un Refugio para el Amor* (*telenovela* – Mexico) **América Next – 10 national titles, 13 foreign titles** 75. *Amor de Madre* (*telenovela* – Peru) 76. *Amores que Matan* (series – Peru) 77. *Así Es la Vida* (soap opera – Peru) 78. *La Akdemia* (series – Peru) 79. *Mi Amor, el Wachimán* (miniseries – Peru) 80. *Mi Amor, el Wachimán 2* (miniseries – Peru) 81. *Mis Tres Marías* (*telenovela* – Peru) 82. *Solamente Milagros* (*telenovela* – Peru) 83. *Vacaciones en Grecia* (miniseries – Peru) 84. *Yo No me llamo Natacha* (*telenovela* – Peru) 85. *La Teacher de Inglés* (*telenovela* – Colombia) 86. *Los Canarios* (series – Colombia) 87. *Pocholo* (*telenovela* – Colombia) 88. *Séptima Puerta: Historias Inexplicables* (series – Colombia) 89. *Sin Retorno* (series – Colombia)

	90. *Sin Senos No Hay Paraíso* (*telenovela* – Colombia) 91. *Chespirito* (series – Mexico) 92. *El Chavo del Ocho* (series – Mexico) 93. *La Fea Más Bella* (*telenovela* – Mexico) 94. *Las Bravo* (*telenovela* – Mexico) 95. *Lo que la Gente Cuenta* (series – Mexico) 96. *Por Ella Soy Eva* (*telenovela* – Mexico) 97. *Vecinos* (series – Mexico) **TOTAL PREMIERE TITLES: 39** **TOTAL REPRISES: 97** **TOTAL BROADCASTED TITLES: 136**

Source: OAP

Several results to highlight, although not necessarily all positive. The year 2018 saw a record of titles broadcasted in Peruvian television in comparison with the results obtained in the last five years. However, this quantity has fallen back in terms of total premiere titles this year, having a considerable increase of Obitel reprises, just as we mentioned last year. Once again, it was América Televisión the station that has programmed the most national premiere fictions, and once again it was Latina the network that has not been successful with their shows, deciding in some cases to cancel them before expected, due to the low ratings. On the other side, TV Perú, the state-owned network, has three completely different fiction shows on the list. In 2016 TV Perú also had the same number of premieres, but they were different seasons of the same fiction. Nevertheless, this last year we had a historical miniseries and two animated series aimed at children. In September 2018, NexTV changed its name to America Next. The alliance between América Televisión and ATV Group made it possible, and it meant not only a change of name but also the rights for a large package of shows from América Televisión, all reprises, to renew their programming. This arrangement has influenced the results shown in Table 1.

Table 2. Premiere fiction in 2018: countries of origin

Country	Titles	%	Chapters/ episodes	%	Hours	%
NATIONAL (total)	**12**	**26.1**	**642**	**23.5**	**620:30:00**	**22.8**
OBITEL COUNTRIES (total)	**27**	**58.7**	**1714**	**62.6**	**1716:30:00**	**63.2**
Argentina	1	2.2	19	0.7	19:00:00	0.7
Brazil	5	10.9	245	9.0	243:30:00	9.0
Chile	0	0.0	0	0.0	0:00:00	0.0
Colombia	2	4.3	165	6.0	165:00:00	6.1
Ecuador	0	0.0	0	0.0	0:00:00	0.0
Spain	0	0.0	0	0.0	0:00:00	0.0
USA (Hispanic production)	1	2.2	119	4.3	119:00:00	4.4
Mexico	11	23.9	786	28.7	790:00:00	29.1
Peru	12	26.1	642	23.5	620:30:00	22.8
Portugal	0	0.0	0	0.0	0:00:00	0.0
Uruguay	0	0.0	0	0.0	0:00:00	0.0
Venezuela	0	0.0	0	0.0	0:00:00	0.0
CO-PRODUCTIONS (total)	**7**	**15.2**	**380**	**13.9**	**380:00:00**	**14.0**
Peruvian Co-productions	0	0.0	0	0.0	0:00:00	0.0
Co-productions between Obitel countries	7	0.0	380	0.0	380:00:00	0.0
GENERAL TOTAL	**46**	**100.0**	**2736**	**100.0**	**2717:00:00**	**100.0**

Source: OAP

Considering the results shown in previous yearbooks, there is evidence of a setback in terms of Obitel premiere productions that reached Peruvian screens. Although Argentina and Mexico kept the same amount of fictions than last year in Peruvian national networks, Brazil, USA and especially Colombia experienced decreases in their numbers during 2018. One explanation may be the constant arrival of fictions from non Obitel countries – especially Turkey, Korea, Taiwan and India – to Peruvian television with good ratings. On the other hand, albeit this table refers to several premieres, it does not necessarily mean that the whole seasons of these fictions have been completely broadcast, because TV stations have developed frailty in terms of keeping fictions in the same time slots or on air due to the result of low ratings. Finally, a large number of reprises this year has affected the number of premieres in this term.

Table 3. Formats national and Ibero-American fiction

Format	National						Ibero-American					
	Titles	%	C/E	%	H	%	Titles	%	C/E	%	H	%
Telenovela	8	66.7	414	64.5	416:00:00	67.0	18	66.7	1155	67.4	1155:00:00	67.3
Series	2	16.7	27	4.2	3:30:00	0.6	6	22.2	511	29.8	513:30:00	29.9
Miniseries	1	8.3	6	0.9	6:00:00	1.0	3	11.1	48	2.8	48:00:00	2.8
Telefilm	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0	0:00:00	0.0
Unitary	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0	0:00:00	0.0
Docudrama	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0	0:00:00	0.0
Others (soap opera, etc.)	1	8.3	195	30.4	195:00:00	31.4	0	0.0	0	0.0	0:00:00	0.0
Total	**12**	**100.0**	**642**	**100.0**	**620:30:00**	**100.0**	**27**	**100.0**	**1714**	**100.0**	**1716:30:00**	**100.0**

Source: OAP

Looking at national productions in Table 3, we can easily distinguish it has maintained the tendency of the last three years, with the *telenovela* retaking evident supremacy versus other formats, especially series and miniseries. Seven of the eight *telenovelas* listed there were broadcasted by América Televisión, which maintained its predominance over other networks and aired a new season of *De Vuelta al Barrio*. This fiction went from being considered *telenovela* to a soap opera format in our list because of its second season release, following the path left by *Al Fondo Hay Sitio*, two years ago. The *telenovela* has also kept ahead of the Ibero-American premieres, which still characterizes the Peruvian audience as a constant consumer of this kind of melodramas, reinforcing their preference for television stories with several episodes being broadcasted daily.

Table 4. The ten most watched titles on open television

	Title	Country of the original idea or script	Network	Format/ genre	N. of chap./ ep. (in 2018)	Time slot	Rating	Share
1	*Mi Esperanza*	Peru	América Televisión	*Telenovela*/ melodrama	91	Prime time	23.6	36.8
2	*Ojitos Hechiceros*	Peru	América Televisión	*Telenovela*/ melodrama	104	Prime time	22.3	34.4
3	*De Vuelta al Barrio*	Peru	América Televisión	Soap opera/ melodrama	195	Prime time	21.4	33.2
4	*Ojitos Hechiceros 2*	Peru	América Televisión	*Telenovela*/ melodrama	28	Prime time	21.2	33.6
5	*VBQ: Empezando a Vivir*	Peru	América Televisión	*Telenovela*/ melodrama	61	Prime time	17.9	28.7
6	*Colorina, Madre por Siempre*	Peru	América Televisión	*Telenovela*/ melodrama	36	Prime time	14.4	23.1
7	*Cumbia Pop*	Peru	América Televisión	*Telenovela*/ melodrama	59	Prime time	13.6	24.4
8	*La Rosa de Guadalupe*	Mexico	América Televisión	Series/ melodrama	204	Afternoon	11.7	25.8
9	*Justicia*	Brazil	Latina	Miniseries/ drama	19	Night	7.5	12.6

10	*La Jefa del Campeón*	Mexico	América Televisión	*Telenovela*/ melodrama	66	After-noon	6.9	16.2
Total productions: 10				**Foreign scripts: 3**				
100%				30%				

Source: OAP and Kantar Ibope Media

Table 4a. The ten most watched national titles on open television

	Title	Country of the original idea or script	Net-work	Format/ genre	N. of chap./ ep. (in 2018)	Time slot	Rating	Share
1	*Mi Esperanza*	Peru	América Televisión	*Telenovela* / Melodrama	91	Prime time	23.6	36.9
2	*Ojitos Hechiceros*	Peru	América Televisión	*Telenovela* / Melodrama	104	Prime time	22.3	34
3	*De Vuelta al Barrio*	Peru	América Televisión	Soap Opera / Melodrama	195	Prime time	21.4	32.5
4	*Ojitos Hechiceros 2*	Peru	América Televisión	*Telenovela* / Melodrama	28	Prime time	21.2	33.3
5	*VBQ: Empezando a Vivir*	Peru	América Televisión	*Telenovela* / Melodrama	61	Prime time	17.9	28.8
6	*Colorina, Madre por Siempre*	Peru	América Televisión	*Telenovela* / Melodrama	36	Prime time	14.4	22.7
7	*Cumbia Pop*	Peru	América Televisión	*Telenovela* / Melodrama	59	Prime time	13.6	24
8	*De Millonario a Mendigo*	Peru	Latina	*Telenovela*/ Drama	5	Prime time	6.0	9.6
9	*Torbellino: 20 Años Después*	Peru	Latina	*Telenovela* / Melodrama	30	Prime time	5.1	7.9
10	*El Último Bastión*	Peru	TV Perú	Miniseries / Drama	6	Prime time	1.5	2.5
Total productions: 10				**Foreign scripts: 0**				
100%				0%				

Source: OAP and Kantar Ibope Media

Once again, Peruvian shows have monopolized the audiences' preferences, as shown in Table 4, also clinching the first seven places among the most viewed fictions, which has not occurred since 2013. Despite the audiences' indicators of these TV shows, they still do not reach the ratings achieved years ago by *Al Fondo Hay Sitio*, although there is a slight increase compared to the results achieved last year. On the other hand, the last places in this table show us fictions from Mexico and Brazil, countries whose *telenovelas* have been decreasing their rating's numbers in favor of Peruvian productions. Regarding the productions of these two countries, it is interesting to point out that these tables only show Obitel productions, but if Turkish fictions – that are also broadcasted in Peru – were included, Mexican and Brazilian fictions would disappear from this table, remaining only *La Rosa de Guadalupe*.

It is also interesting to observe in Table 4a that *Mi Esperanza* reaches the first place in this top ten, a very traditional *telenovela* that keeps the characteristics of typical melodrama, reinforcing the struggles of a self-sacrificed protagonist in charge of a little girl. In second place is *Ojitos Hechiceros*, also with a lead female character who struggles to thrive and including the popular music factor – so common in Peruvian fictions in this century. Another fiction with a female protagonist, *Colorina, Madre por Siempre*, only gets the sixth place. As we remember, this *telenovela* was a strategy to shorten the Peruvian version of *Colorina* (2017), which did not accomplish the expected success.

De Vuelta al Barrio, the comedy soap opera set in the 1970s and that premiered as the replacement of the successful *Al Fondo Hay Sitio*, reaches the third place and is the national fiction with the highest number of episodes broadcasted during 2018.

Youth TV shows are only present in the second half of Table 4a. The most recent season of *VBQ – VBQ: Empezando a Vivir* – does not manage to reach the ratings of its predecessors and stays at fifth place. *Cumbia Pop*, also bringing the musical component to the melodrama, reaches the seventh position. Within this young themed TV shows, we find at second to last place *Torbellino: 20 Años Después*, a failed Latina production that appealed nostalgia by including actors from the *telenovela Torbellino* (1997) – which was also musical themed – along with young stars. Although Latina's other *telenovela*, *De Millonario a Mendigo*, achieved better ratings, this accomplishment is misleading since it was a fiction produced years ago; and due to the progressive decline of audience interest, it was canceled after broadcasting very few of their many episodes.

Special mention deserves the historical miniseries *El Último Bastión*, broadcasted by TV Perú, because it is an effort of the only state-owned channel to bring a story linked to the celebration of Peru's Independence Bicentennial.

Table 5. Audience profile of the ten most watched titles: gender, age, socioeconomic status

Titles		Network	Gender %		Socioeconomic status %		
			Women	Men	AB	C	DE
1	*Mi Esperanza*	América Televisión	62.5	37.5	14.6	46.9	38.5
2	*Ojitos Hechiceros*	América Televisión	62.9	37.1	14.3	44.8	40.9
3	*De Vuelta al Barrio*	América Televisión	62.0	38.0	14.5	45.9	39.5
4	*Ojitos Hechiceros 2*	América Televisión	63.8	36.2	14.2	46.9	38.9
5	*VBQ: Empezando a Vivir*	América Televisión	64.0	36.0	13.9	44.9	41.2
6	*Colorina, Madre por Siempre*	América Televisión	63.2	36.8	14.0	43.1	42.9
7	*Cumbia Pop*	América Televisión	62.8	37.2	10.2	46.9	42.9
8	*La Rosa de Guada-lupe*	América Televisión	65.7	34.3	11.5	44.3	44.2
9	*Justicia*	Latina	66.6	33.4	26.6	40.5	33.0
10	*La Jefa del Campeón*	América Televisión	65.5	34.5	11.5	47.6	41.0

Titles		Network	Age group %					
			3-10	11-17	18-25	26-37	38-49	50-99
1	*Mi Esperanza*	América Televisión	16.4	14.8	12.9	20.1	16.1	19.7
2	*Ojitos Hechiceros*	América Televisión	14.7	15.4	14.4	21.3	15.8	18.4
3	*De Vuelta al Barrio*	América Televisión	17.0	15.5	13.2	20.3	15.5	18.5
4	*Ojitos Hechiceros 2*	América Televisión	16.8	17.0	12.3	19.7	16.0	18.3
5	*VBQ: Empezando a Vivir*	América Televisión	14.4	17.1	15.0	21.6	13.6	18.3
6	*Colorina Madre por Siempre*	América Televisión	12.8	15.2	14.8	22.3	15.2	19.8
7	*Cumbia Pop*	América Televisión	16.2	19.2	13.4	20.3	14.0	16.8
8	*La Rosa de Guadalupe*	América Televisión	17.6	13.4	14.9	20.4	15.4	18.3
9	*Justicia*	Latina	7.2	6.5	5.2	16.2	18.3	46.5
10	*La Jefa del Campeón*	América Televisión	15.9	13.1	16.1	21.4	12.6	20.9

Source: OAP and Kantar Ibope Media

Although an initial look at the first part of Table 5 leads us to think again that Peruvian television audience is mainly female, the results of socioeconomic status show that something has changed. The percentages of stratum C exceeded those of stratum D in all cases when it was normally the other way around. This raises the question if sector D is not watching television, or if they are doing it on other platforms, or if suddenly the stories offered by the TV shows are not so attractive for stratum D and ideal for C, where people have a better purchase capability and, therefore, are more advantageous to advertisers.

In this first part of Table 5, it is also interesting to see that the only case in which the percentages of strata C and D decline significantly is the same in which AB are at their peak. It refers to Brazilian miniseries *Justicia*, which is also the only fiction we find in this top ten that was not broadcasted by América Televisión and with a different narrative compared to the other nine productions of this list.

The second part of Table 5 shows a much more even situation, with the concentration of television audience in two intervals: 26-37 and 50-99. TV audience continues to be eminently adult in that sense. Two cases differ here: the first, *Cumbia Pop*, having its second-best percentage in the 11-17 group, which is understood by the juvenile story and its attachment to music; *Justicia* has its main audience on the 38-49 and 50-99 groups, as an answer to the topics dealt in this fiction.

3. VoD monitoring in 2018

3.1. VoD in Peru

Chart 2. VoD in Peru

	Platforms	Total
VoD linked to open TV networks	América TVGO, Latina Play, ATV Play, TV Perú App, Panamericana App, Willax YouTube	**6***
VoD linked to subscription networks	HBO Go, Fox Play, Fox Latinoamerica (App), Fox Sports (App), ESPN Play, Movistar Plus YouTube**	**6**
VoD linked to telecom enterprises	Claro Video, Movistar Play, Direct TV, Fútbol Movistar	**4**
VoD without links to TV networks	Netflix, Amazon, Apple TV, Instagram TV	**4**
GENERAL TOTAL		**20**

* Each network has a longer list of platforms. The main one, where most of its material is available, has been included.

** It is not all the network's content. Its access is free, but it has been placed here because it is part of Movistar subscription service.

Source: OAP

The overview shown in Chart 2 may be similar to other Latin American countries, except for VoD cases linked to open television networks. Of all those mentioned here, it is América TVGO the one that appeared first than the others, in 2012, and the one which has also been offering more advantages to its users. It is a live signal platform with exclusive material source that provides live participation through voting and is also associated with special discount promotions while acting as a TV shows repository. Both Latina App and ATV Play have similar features to those of América TVGO, although they are free and with a more modest offer. Panamericana app replicates the possibilities that users can find on the network's website: live signal, a repository of TV shows, and all kinds of news including sports and entertainment. TV Perú's app is mainly a repository of its recent shows, but it also offers the live broadcast of its three differentiated programming in DTT. Thus, the investment that the networks make in other alternatives besides the television signal depends directly on their economic capacity.

3.2. Earnings of VoD systems

Getting official earning figures from VoD systems is complicated in Peru, because the systems are still developing and, above all, they are in the early stages of strengthening their distribution and sustained use among clients. On the other hand, the official measurement of VoD is not yet available by the companies dedicated to this item in the country. However, an analysis published by Nielsen in Latin America in 2016 already showed that VoD trend among Peruvian users was progressively increasing: "more than 23% of Peruvians declare [to watch content in VoD] once a day, 22% three to six times a week and 20% once or twice a week" (Nielsen, 2016).

In the light of this landscape, TIC News portal establishes that América Televisión, the station with the highest ratings and that dedicates the most resources to its original TV shows and VoD service, "(...) spent a lot of time working on correcting technical difficulties instead of focusing their efforts to monetize its content in all its properties and audiences (...). This is particularly important because 60% of its audience consumes content on mobile devices" (TIC News, 2016).

Telecommunications services also launched their own VoD platforms in Peru. Claro Video is the pioneer in this case, which, according to data from Rapid TV News portal, increased by 100 thousand subscribers lately, reaching 250 thousand by 2017, rising five times the consumption of its shows in a single year.

There is a clear expansion of these services. What needs to be done now is to strengthen them and offer consumers a differential advantage, an additional attraction that these services may offer to the traditional television consumer.

3.3. VoD analysis in 2018: national and Ibero-American premiere fiction

Table 6. National and Ibero-American premiere fictions broadcasted in VoD in 2018

Premiere national titles	Premiere Ibero-American titles	Co-productions
América TVGO – 5 titles 1. *Sola por Hoy 2* (series) 2. *Como TV* (series) 3. *Historia de Red* (series) 4. *Yo Perdí el Corazón* (miniseries) 5. *O Besas o Besas* (series)	**Netflix – 23 titles** 1. *La Casa de las Flores* (series – Mexico) 2. *Paquita Salas 2* (series – Spain) 3. *Élite* (series – Spain) 4. *El Mecanismo* (series – Brazil) 5. *Luis Miguel* (series – USA) 6. *Las Chicas del Cable 3* (series – Spain) 7. *Diablero* (series – Mexico) 8. *Encerrados* (series – Argentina) 9. *Samantha* (series – Brazil) 10. *Edha* (series – Argentina) 11. *Ingobernable 2* (series – Mexico) 12. *Merlí 3* (series – Spain) 13. *Psiconautas 2* (series – Argentina) 14. *Borges* (series – Brazil) 15. *3% 2* (series – Brazil) 16. *Super Drags* (series – Brazil) 17. *Distrito Salvaje* (series – Colombia) 18. *La Ley Secreta* (*telenovela* – Colombia) 19. *El Ministerio del Tiempo 3* (series – Spain) 20. *Cocaine Coast (Fariña)* (series – Spain) 21. *The Tribe* (telefilm – Spain) 22. *La Balada de Hugo Sánchez* (series – Mexico) 23. *Yo, Potro* (unitary – Mexico)	**Netflix – 2 titles** 1. *Narcos: Mexico* (series – USA, Mexico) 2. *El Chapo 3* (series – USA, Mexico)
Total: 5	**Total: 23**	**Total: 2**
GENERAL TOTAL: 30		

Source: OAP

We are facing a similar landscape of content offerings regarding Netflix in our region, but the difference in our country is brought by América TVGO. This platform offers five original shows in this opportunity. The first one, *Sola por Hoy,* aired its second season. Although it is still a webseries with short chapters, this fiction can also be watched on América Televisión YouTube channel. *Como TV*, original fiction made for América TVGO with short episodes, brings the world of making a television show from the inside. *Historias de Red* is another exclusive feature of América TVGO. With episodes lasting for a standard TV hour, its title and stories relate to the risks that may be found on the internet and social media. *Yo Perdí el Corazón* and *O Besas o Besas* are shows produced years ago that were not broadcast, but now they can be found in América TVGO. Since 2018 they are offered exclusively through this platform, which tells us about a decision of the network to distribute their productions outside a regular television programming, already covered by fictions that reach an important audience rating or that include more current themes.

Table 7. Premiere fiction in VoD in 2018: countries of origin

Country	Titles	%
NATIONAL (total)	**5**	**16.67**
OBITEL COUNTRIES (total)	**23**	**76.67**
Argentina	3	10.00
Brazil	5	16.67
Chile	0	0
Colombia	2	0
Ecuador	0	0
Spain	7	23.33
USA (Hispanic production)	1	3.33
Mexico	5	16.67
Peru	5	16.67
Portugal	0	0
Uruguay	0	0
Venezuela	0	0
CO-PRODUCTIONS (total)	**2**	**6.67**
Peruvian co-productions	**0**	0
Co-productions between Obitel countries	**2**	6.67
GENERAL TOTAL	**30**	**100.00**

Source: OAP

With this first overview at VoD fictions from Obitel countries, it is clear the discrete amount of content offered from Peru compared to what can be found in the general figures of other countries. However, just by itself, Peru is among the countries that most fictions premiere on platforms, except for Spain, which stands out among the others. Let us not forget what we said before regarding the volatility of the programming in Peruvian networks, which could also explain why they do not want to face many risks and prefer to place some of their TV shows only on their platforms. Their behavior contributed to having these five Peruvian fictions during 2018.

Table 8. Formats of national and Ibero-American fiction in VoD

Format	National				Ibero-American			
	Titles	%	C/E	%	Titles	%	C/E	%
Telenovela	0	0.00	0	0.00	1	4.00	60	21.58
Series	4	80.00	49	49.00	22	88.00	216	77.70
Miniseries	1	20.00	51	51.00	0	0.00	0	0.00
Unitary	0	0.00	0	0.00	0	0.00	0	0.00
Others	0	0.00	0	0.00	2	8.00	2	0.72
Total	5	100.00	70	100.00	25	100.00	278	100.00

Source: OAP

It is quite clear that the fiction shows offered by VoD systems do not necessarily promote a format with a large number of episodes, like the *telenovela*, and favor contents with fewer episodes, such as series and miniseries.

4. Fiction analysis: open TV, VoD and transmedia expressions in networks

In the Peruvian case, we have followed the national production *Ojitos Hechiceros 2*, the second part of the *telenovela Ojitos Hechiceros*, both produced by Del Barrio Producciones and broadcasted by América Televisión on its open signal, on its YouTube channel América Televisión Novelas, and on its América TVGO digital platform. With 65 chapters broadcasted at the time we write this chapter, *Ojitos Hechiceros 2* has developed a set of transmedia production strategies using different networks and platforms. The producer has an official Facebook account[3], a Twitter account[4] and an official Instagram account.[5] In these networks, the production is quite active, sharing material and information about the summaries, the previews, the dramatic turns, the climax points of the story, but also what the audience thinks about what happened throughout the story about their characters. During its broadcast, surveys have been created, live interviews have been given, exclusive material has been presented, as photos of the artists and behind-the-scenes sessions of some scenes of the production, and in the last stage it premiered a music video of the theme "Princess", played by the actors and singers Nikko Ponce and Melissa Paredes.[6]

What we find in the different strategies of transmedia production carried out by *Ojitos Hechiceros 2* goes beyond the fictional pact of the main story, to give way to the discussion on some proposed topics, which, although they are developed in the audiovisual story, allow reflection in the public sphere. This is the case of the issue of sexual harassment and domestic violence. Estrella and Belén are victims of domestic harassment and violence, and on the networks the production has offered different polls and spaces for discussion, allowing the audience to express their views and opinions about what should be done. As the Spanish author Teresa Bellón Sánchez (2012) points out, audiovisual stories transcend the fictional pact to give rise to new pacts, new dialogues and new encounters.

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[3] https://www.facebook.com/search/top/?q=ojitos%20hechiceros%202&epa=SEARCH_BOX.

[4] @DelBarrioPro.

[5] ojitoshechiceros2.pe.

[6] Available at https://www.youtube.com/watch?time_continue=2&v=ffkBYTC9K2g.

Source: Del Barrio Producciones[7]

According to Yvana Fechine (2013), there are two major transmedia production strategies: propagation and expansion. The reformulated contents and the informative contents are associated with the sphere of propagation; and, in the expansion, we find contents of textual and playful extension.

In the case of *Ojitos Hechiceros 2*, regarding propagation, we can recognize practices of anticipation, recovery, mixing, as well as contextual and promotional content. For these practices, the production uses its Facebook, Twitter and Instagram accounts simultaneously, in addition to its own América TVGO platform and its YouTube channel.

In relation to the expansion, we find contents of textual extension: narrative and diegetic. In terms of diegetic extension, *Ojitos Hechiceros 2* itself is the diegetic extension since this is the second part of *Ojitos Hechiceros*, a story that was initially planned as a 104-chapter *telenovela*, broadcasted on its different platforms. Faced with the success of the audience, the station requested a second part, which demanded from the production house and writers to

[7] Retrieved on January 11, 2019 from https://www.facebook.com/DelBarrioPro/photos/a.467154779988100/1953434528026777/?type=3&__tn__=-R.

open the narrative arcs that were closed, establish new conflicts, and recover the antagonistic characters whose endings were foreseen in the initial story. Also, new characters and issues such as sexual harassment and violence against women were incorporated as central themes of the story. In the contents of playful extension, *Ojitos Hechiceros 2* proposes experiential extensions with concerts, a musical[8], live performances and autograph signing.

In Obitel Yearbook 2014, we pointed out that, in the field of transmediation, Del Barrio Producciones had been experimenting fairly constantly and with an important response from its audiences to the local market. We can now state that these bets have intensified, have taken shape, have been incorporated into the production of the story. They are planned, programmed and sustained over time because they are important for maintaining a close dialogue with their different audiences. Del Barrio produces, in this way, the different consumption practices on more mobile and increasingly personal screens.

5. Highlights of the year

In 2018, just when Obitel decided not to observe so closely public television, the highlight in Peru was TV Perú and its actions, both in terms of fiction and in terms of the international relations it has developed (as discussed in 1.1). In previous yearbooks, we had informed about TV Perú's attempts to expand its shows by being more inclusive and addressing population demands that were being relegated by commercial stations. In its programming, there are news shows in Peruvian native languages (*Ñuqanchik*, in Quechua, and *Jiwasanaka*, in Aymara), and shows for children, totally relegated by private stations. Let us not forget that one of the four DTT frequencies of TV Perú is IPe station (see yearbook 2017), dedicated to children and youth audience. In 2018 TV Perú broadcasted three fiction

[8] https://www.americatv.com.pe/ojitos-hechiceros/ojitos-hechiceros-musical-unica-funcion-23-junio-noticia-87938.

shows, something that had not happen since decades ago, because its programming is more focused on informative and cultural shows.

As the celebration of the 200 years of independence approaches, TV Perú decided to produce and broadcast the fiction *El Último Bastión*, a historical series about the independence struggle in Peru, which portrays tensions during the years of Peruvian independence through the life of two brothers: one supporter of the independent movement, and another the head of the Realist guard. The series has involved a great work of art, hardly seen in national production, having to reproduce Lima of the early 19th century with limited resources. But the experience of this fiction also shows the conditions of production in the state-owned station, run under conditions and budgets of Peruvian bureaucracy, as already experienced in the production of *Conversando con la Luna* (see previous yearbooks). Not only it had to assume a period fiction – challenging in costumes, set design, traveling outside Lima, etc. – with a low budget, but also had to answer the State expenditure logic, with fixed schedules. This forced the station to broadcast not the show as planned, but a swift editing of six episodes in a "premiere" somewhat hurried, to meet the State's demands on budget use and present visible results. After these episodes airing, the station announced that the (real) premiere would be in April 2019. Even so, despite jumps in the plot by the forced editing, the episodes broadcasted had a favorable response from the audience, reaching a spot among the ten most watched fictions in Peru (see Table 4a).

Along with this show, TV Perú broadcasted two children fiction microshows, produced in two different animation techniques. *Martina and Rigoberto* uses stop-motion animation technique, becoming the first fiction show of its kind in Peru. This fiction aims at children audience, and the characters – mestizo schoolchildren, representative of the vast majority of Peruvians – respond to concerns and problems such as the concept of art, forgiveness, and the death of a loved one. *Ciudad Jardín* is a 2D animation show, and its characters are pre-school animals who touch topics with ecological content through their stories. Both are co-productions between TV

Perú and new independent producers (Fónica Studios and Polirama, respectively).

These efforts, with their limitations and shortcomings, show us a station with a different mentality compared to previous government administrations, and willing to bet on other fiction themes, targeting different audiences than those frequently appealing to private broadcasting stations. Although the audience numbers do not come close to the most watched programs of Peruvian television, the positive response of *El Último Bastión* cannot be ignored, neither the fact that TV Perú is the station with the largest national coverage. As indicated in section 1.5, besides the large coverage in analog broadcasting that TV Perú has in national territory, almost one-third of the 150 frequencies of DTT stations in Peru belong to TV Perú. Also, all the productions are available on their official YouTube channel, which increases their audience possibilities.

6. Theme of the year: television distribution models by the internet: actors, technologies, strategies

Talking about television distribution models by the internet in Peru limits the landscape because it is a distant reality due to costs, access, coverage and permanence. As Lotz, Lovato and Thomas point out (2018: 37), "the days of internet television distribution are still early and actors and practices are constantly changing". In this global panorama that is replicated locally, América Televisión and Latina are the stations that have begun to work with some models of internet distribution. However, many of them are related to information or recreational shows, as we have previously mentioned, or newscasts on Facebook Live, news feeds via Twitter, interviews and streaming dialogues during commercial breaks of the open signal.

In relation to television fiction, América Televisión is the station that made the largest investment and efforts in the distribution of television over the internet.[9]

[9] América also calls for participation on Pinterest: https://www.pinterest.com/Americatvperu/.

Schema 1[10]

Name (parent corporation)	Sector	Modality of participation	Level of market dominance	Scope	Country
América Televisión	Mass media	Web portals (YouTube, Facebook, Instagram, Twitter), cable TV, app	First subscription-based VoD distributor	Private	Peru

Source: OAP

Before a highly dynamic global landscape, Pablo Massi Napoli, CEO of América Televisión, points out that, although entertainment currently suffers a set of metamorphoses, the bet of the company is "to continue producing for Peruvians". In this sense, its commitment is to bet on strengthening the chain value of América Televisión in this new media ecology. If América Televisión is currently located in production, programming and marketing, for the next few years it is heading towards talent and audiences. For this, it has strategic allies in terms of realization.

Schema 2

Where is América in the industry's value chain?				
Talent	Producer	Trader programmer	Distributor	Audiences

Source: Preventa 2019 América Televisión

In addition, América Televisión is focused on connectivity in its different screens and platforms: open signal, digital platforms and cable by the end of 2018 with an outlook to 2019.

[10] Model taken from: Pinõn, J. (2019). *Primer reconocimiento de la infraestructura de la distribución de la televisión por internet: sectores, corporaciones, tecnologías, redes y relaciones.*

In this new moment of the media industries, América Televisión has been the first Peruvian channel that has thought about the way how it is currently producing and consuming television. As a result, it launched América TVGO, seeking to introduce some of the new ways of distributing television content locally. As we have pointed out in previous yearbooks, América TVGO is a digital subscription platform that allows users to access the fictional, informative and entertainment content of the entire América Television platform. It has different ways of sharing material and the episodes of the shows are uploaded as soon as they are broadcasted. In the case of the programs produced for the platform, these are uploaded in full seasons. Lotz, Lobato and Thomas argue that, when we approach the study of internet distribution, it is positive to disaggregate the service according to the following criteria: geography, business model, linearity or not, ownership and structure of the library. In the case of América TVGO, we have Schema 3.

Schema 3

Geography	Regional
Business model	Subscription
No linearity	Live and VoD
Ownership	Private; media; focused on communication
Structure of the library	Indexed by *telenovelas* and series, magazines, news, sports, specials, kids, favorite

Source: OAP

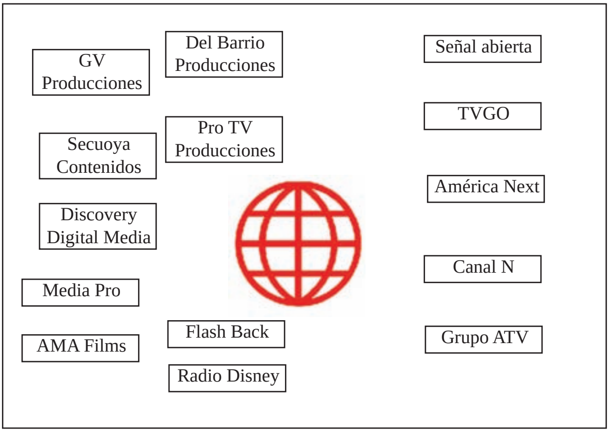
At the time of writing this chapter, América TVGO is available at Roku Inc. Peru, a pioneer in TV streaming, founded by Anthony Wood, inventor of the DVR, whose head office is located in California, United States. In the words of José Hernández, manager of América Digital,

> Roku allows users and fans of América to enjoy our programming live and on demand, on their TV sets and in the company of their family or friends, in every corner of Peru [...]. This agree-

> ment with Roku allows us to extend the reach of our contents to new platforms, in line with the new trends and consumer habits of users.[11]

If, as Lotz, Lobato and Thomas (2018: 36) point out, television distributed over the internet is constituted by “the online portals that distribute series according to the professional practices of the television industry”, by 2019, América Television portal is projected as presented in Schema 4.

Schema 4



Source: Preventa 2019 América Televisión – OAP

In this new media ecology, América Televisión, TVGO, América Next, Canal N and ATV Group – which they represent commercially – will not only be distribution windows, but they can also function as interfaces to collect information about users, traffic figures, modalities of use, and demographics of the different audiences.

[11] Available at https://www.americatv.com.pe/americlub/america-tvgo-ya-esta-disponible-roku-noticia-99691.

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7

Portugal: a static market with eyes on the future[1]

Authors:

Catarina Duff Burnay, Pedro Lopes, Marta Neves de Sousa

1. Portugal's audiovisual context in 2018

The year 2018 was marked by expectations regarding the revision of the European Audiovisual Media Services Directive, which was only to be published in December and has not yet been transposed into national legal frameworks. The national market was just like it has always been, with the commercial free-to-air channels SIC and TVI investing in the *telenovela* format for prime time and with the public station, RTP, continuing to diversify its offer with series from different genres.

In the context of pay TV, the highlight is on the development of micro-narratives, mainly comedy sketches, by Canal Q (alternative channel) and the announcement of the production of a *telenovela* by Correio da Manhã TV (CMTV), the television extension of the best-selling newspaper in Portugal – *Correio da Manhã* – and the leader in audiences in terms of subscription channels. The *telenovela* is scheduled to debut only in March 2019, but it may provoke changes in the television market by approaching a paid news channel to a free-to-air one.

[1] The Portuguese team is grateful to CAEM, GfK and Marktest MediaMonitor for their collaboration in collecting and processing the data needed for this chapter.

1.1. Open television in Portugal

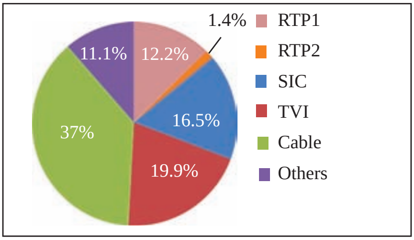
Chart 1. National open TV stations/channels in Portugal

Private stations/channels (2)	Public stations/channels (4+1)
SIC TVI	RTP1 RTP2 RTP3 RTP Memória Canal Parlamento
Sum of the stations = 3 **Sum of the channels = 7**	

Source: Obitel Portugal

Graph 1. TV rating and share by channels

Channel	Rating (%)	Share (%)
RTP1	2.4	12.2
RTP2	0.3	1.4
SIC	3.2	16.5
TVI	3.9	19.9
Cable	7.3	37.0
Others	2.2	11.1



Source: Obitel Portugal – Marktest MediaMonitor

The total offer of free-to-air channels did not change in 2018, however, during the year, it was announced the launching of two call for tenders for the opening of both a thematic news channel and a sports channel. According to the Ministry of Culture,

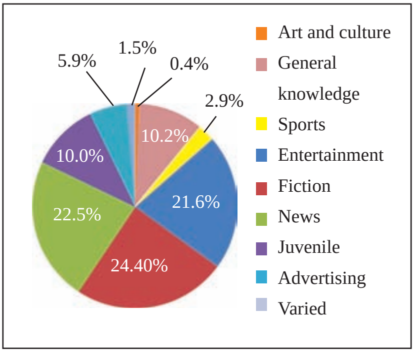
> the choice of channel typologies to be awarded in this competition resulted from the consideration of the current offer in terms of television, the ability of operators to offer certain types of television services, the consumer's appetite for certain content and of their ability to enjoy them[2].

[2] Oferta atual determinou escolha pelos canais televisivos que vão a concurso para TDT. *Jornal de Negócios*. Retrieved on February 6, 2019 from https://www.jornaldenegocios.

Regarding the total sum of audience per channel, despite the decrease in free-to-air channels (from 52% to 50%) and the slight increase in subscription channels, a clear preference for the national offer of digital terrestrial television remains. On the other hand, consumption on video on demand (VoD) and other means of consuming TV (internet browsing, video games, among others) rose by 1.6% to 11.1% in 2018 (8.1% correspond to access to streaming platforms).

Graph 2. Genres and hours broadcasted on TV

Broadcasted genres	Number of hours	%
Art and culture	112:23:42	0.4
General knowledge	3050:35:24	10.2
Sports	854:19:07	2.9
Entertainment	6411:53:51	21.6
Fiction	7232:09:49	24.4
News	6682:58:06	22.5
Juvenile	3143:08:41	10.6
Advertising	1752:57:54	5.9
Varied	432:24:03	1.5
TOTAL	**29672:50:37**	**100**



Source: Obitel Portugal – Marktest MediaMonitor

If, from 2016 to 2017, there was a strong decrease in the supply of sports content (43% less) and a milder one in news (10% less), in 2018 we see a reversal in the numbers, with an increase in the supply of sports content in 23% and news content in 3%. Regarding the first program segment, 2018 had the World Cup in Russia (an event that was considered to be of general public interest in an order signed by the then Minister of Culture, obliging the holders of the broadcasting rights to grant access to interested free-to-air operators) and the Pyeong Chang Winter Olympic Games, whose rights of transmission were acquired by RTP. In fact, the public service TV station concentrated the issuing of sports events (88.2%), followed

pt/empresas/media/detalhe/oferta-actual-determinou-escolha-pelos-canais-televisivos-que-vao-a-concurso-para-tdt.

by private channels by a large margin (SIC, 9.4%, TVI, 2.4%). This ranking remained in relation to the offer of newscasts, although with less pronounced differences. Regarding the offer of fictional content, in addition to a decrease in the total number of hours compared to 2017 (−1.5%) – breaking the upward trend of the last four years –, the private channels are the ones that most broadcast fiction (66% overall), against the 34% from RTP1 and RTP2.

1.2. Pay TV

Over the past few years, paid channels have been gaining ground over free-to-air channels. Nevertheless, from 2016 to 2018, the growth in terms of share (%) of the pay channel set was only 0.6 (0.5 from 2016 to 2017 and 0.1 from 2017 to 2018). CMTV, the news channel, continued to lead the list of most viewed channels (3.6%), followed this year by Globo (2.3%) and by Hollywood and Disney Channel. (2%). Concerning the channels dedicated to TV series, the top three was formed by Fox (1.8%), Fox Life (1.3%) and AXN (1.2%).

According to the National Communications Authority (*Autoridade Nacional de Comunicações* – Anacom)[3][4], at the end of the first quarter of 2018, 84.3% of Portuguese households accessed pay TV, most of which did so by contracting a full package. NOS, the market leader in 2017, ranked first, with 41.9% of subscriptions, followed by other players (MEO, 38%, Vodafone, 14.7% and Nowo, 4.4 %). It should be noted that MEO was the operator to attract more subscribers when comparing to the same period of the previous year. The growth in subscriptions from 2017 to 2018 was of 3.5% (keeping constant with the increase seen in the previous year), in particular, and once again, due to the supply in optical fiber, a technology that

[3] Its role is to regulate the communications sector, including electronic and postal communications, and, without prejudice to its nature, as an independent administrative entity, to assist the government in these areas.

[4] Anacom. Retrieved on February 6, 2019 from https://www.anacom.pt/streaming/TVS1S18.pdf?contentId=1461991&field=ATTACHED_FILE.

uses thinner and lighter materials, but with high capacity and speed for data transmission, thus allowing the interactivity and availability of the image and sound in high definition. In terms of the number and type of channels, there was a 5.2% increase in the adhesion to packages with more than 100 channels (78.4%), but in regard to the adhesion to premium channels the oscillation from 2017 to 2018, although descending, was inexpressive (from 15.5% to 15.4%). The use of functionalities increased by 1.2%, reaching 74.4% in the first quarter of 2018.

1.3. Advertising investment: in TV and in fiction

Advertising investment increased again in 2018, confirming the recent years' trend, both in Portugal (+5.6%) and worldwide (+7.2%). According to a study carried out by MediaMonitor[5], between January and November 2018, 79.7% of the total investment was made in television, followed by a large difference in internet investment (8.6%) and in the press (5.2%); radio/cinema and billboard collected 6.5%. In terms of channels, RTP1 and TVI have both increased their numbers (20% and 11% respectively), with SIC showing slightly lower figures than in 2017. This generalized bet on television may be linked to the rooted Portuguese habit of watching television (about 293 minutes a day)[6], as well as to the low values practiced, which is an attractive factor for the brands.[7] The three most assiduous brands on the small screen were Unilever Fima (consumer products) and the two main telecom operators, NOS and MEO-Altice. Their presence within the content – product placement – is a strategy more and more common in fiction and entertainment

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[5] NOS lidera investimento publicitário em novembro. *Marktest*. Retrieved on February 6, 2019 from https://www.marktest.com/wap/a/n/id~247a.aspx.

[6] Statista. Retrieved on February 6, 2019 from https://www.statista.com/statistics/694744/daily-tv-consumption-in-portugal/.

[7] Digital representa 45% do investimento publicitário no mundo. Imagens de Marca. Retrieved on February 6, 2019 from https://www.imagensdemarca.pt/artigo/digital-representa-45-do-investment-publicitario-no-mundo/.

products, allowing for financial support without the break. It was also verified a strategy of decentralization of narratives, allowing the support of local authorities, such as in the *telenovelas Vidas Opostas* (SIC), filmed in Amarante and Melgaço, and *Valor da Vida* (TVI), filmed in Guimarães. On the other hand, online investment, despite slowing down, is expected to grow by 18% in 2019 – 62% of which are generated by impressions and clicks on mobile devices –, with the social network aspect taking the largest piece.

1.4. Merchandising and social merchandising

Resorting to merchandising is not a common practice in the Portuguese television industry, however, the production company SP Televisão organized, for a further year and in partnership with the Portuguese Association for Victim Support, a solidarity event to sell the wardrobe of the *telenovela Paixão* (SIC). With regard to social merchandising, it is important to point out the exploration of current issues, some of them controversial, with local and simultaneously global impact, such as doping in competition sports (*Vidas Opostas*, SIC), child abuse (*A Teia*, TVI) or human cryogenics (*Valor da Vida*, TVI). In *Alma e Coração* (SIC), in addition to the discussion on subjects such as organ transplantation or overcoming disability, we see, for the first time in Portuguese fiction, the exploration of the occult, as well as the representation of an actual problematic neighborhood that exists in real life – Cova da Moura – and its own dynamics, allowing reflection on sensitive issues such as racism, emigration and populism.

1.5. Communication policies

In line with what was highlighted in 2017, the proposal to revise the Audiovisual Media Services directive continued to mark the 2018 agenda.[8] Among other issues, such as the limits on ad-

[8] In 1989, the Television without Frontiers directive was created to regulate the free movement of European television programs in the internal market and the obligation

vertising and the protection of minors, differences in the regulatory framework in the various member states show the existence in some countries, such as Portugal, of foreign channels broadcasting without supervision, not having to comply with obligations related to the support of cinema and audiovisual, nor the quotas of European and independent production and transmission. Another reality to which the directive seeks to address is the consequences of media convergence (VoD and video sharing platforms) with regard to copyright protection and compliance with European and independent production quotas. The new directive was approved in December 2018 and the member states have 21 months to transpose it, thus keeping open the way the indications will be applied by the Portuguese industry and its real consequences.

Also in 2018, tax changes were introduced, with the revocation of the existing benefit and with the launching of the Support Fund for Tourism and Cinema (Decree n. 45/2018), which provides for a system of reimbursement of production expenses (cash-rebate). Following a trend in several European countries, Portugal offers the possibility for works produced or partially produced in the country to obtain financial support between 25% and 30% of the total eligible expenses.

Also noteworthy is the entry into force of the General Data Protection Regulation in May 2018, establishing the rules regarding the processing by a person, company or organization of personal data relating to people in the European Union and to the non-fulfillment of the purchase of the private channel TVI by the telecommunications operator MEO-Altice. Announced in 2017, the purchase intent of the French group Altice generated a great stir in the market

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for television channels to allocate more than half of their broadcasting time to European works. It was also intended to preserve cultural diversity, the protection of minors and the right of response. This directive was amended in 1997 and 2007 and revoked in 2010, giving rise to the revised Audiovisual Media Services directive, with the aim of adapting the media to the new contexts of production and reception of audiovisual content in the European space.

by presenting itself as a vertical integration process. The Anacom (Competition Authority) has shown itself against the deal and the Regulatory Entity for Social Communication[9] has, in the same line of thought, warned about the potential threat to media plurality.

1.6. Digital and mobile connectivity infrastructure

Approved in 2012 and revised in 2015, the Portugal Digital Agenda[10] aims to develop the digital economy and the knowledge society. Its targets by 2020 are the development of broadband infrastructure, the creation of conditions for an increase of 55% the number of enterprises using e-commerce and of 25% in exports in information and communication technologies, the promotion of ICT innovation and the strengthening of R&D potential by increasing funding by 10%, improving literacy, qualifications and digital inclusion and fighting fraud. According to the International Data Corporation Portugal[11], this market grew by 2.6% in 2018, with the third-platform technologies (cloud, mobility, social business and big data), and innovation accelerators (IoT, IA, 3D print, new human and digital interfaces, robotics and blockchain) accounted for about 54% of the market. The study also shows that most organizations are in levels 2 and 3 of maturity with respect to digital transformation (Digital Explorer and Digital Player, respectively).

With regard to the common user, and according to the Instituto Nacional de Estatística (INE)[12] for 2017 data, 75% of Portuguese between the ages of 16 and 74 use the internet, 10% below the Eu-

[9] The Regulatory Entity for Social Communication, formerly known as High Authority for Social Communication, has as its objective the regulation and supervision of all entities that pursue media activities in Portugal.

[10] Portugal Digital. Retrieved on February 22, 2019 from http://www.portugaldigital.pt/enquadramento/.

[11] IT channel. Retrieved on February 22, 2019 from https://www.itchannel.pt/news/negocios/idc-predictions-mobilidade-no-topo-de-prioridades-de-investimento-das-empresas-nacionais.

[12] TV124. Retrieved on February 22, 2019 from https://tvi24.iol.pt/tecnologia/ine/internet-esta-em-quase-80-dos-lares-em-portugal.

ropean average. About 81% of these 75% have accessed the internet on a mobile device, a number that has been growing and is in line with the penetration of the mobile telephone service in Portugal (96% of individuals from the age of 10 in the first quarter of 2018). It is exactly from the smartphone that individuals most access social networks, estimating, in 2018, 5.3 million users of these platforms. Facebook is the favorite (95%), followed by Instagram, with almost 60% of users, which grew the most to follow companies/brands and where 76% of the population reported to publish photographs and images on a recurring basis.[13] All these data put the country in the 25th place (out of 79) in the Global Connectivity Index 2018.[14]

In 2018 Portugal was once again the site of the Web Summit, one of the most important events of technology, entrepreneurship and innovation in Europe, and the Portuguese government announced the holding of the meeting in Lisbon until 2028.

1.7. Independent production companies

According to the Barometer of the Audiovisual Production Sector in Portugal 2018[15], a study commissioned by the Association of Independent Television Producers (Associação de Produtores Independentes de Portugal – Apit)[16], an entity that gathers 30 independent production companies and fights for the interests of the sector, 57% of the companies had a client with a weight of more than 75% of turnover, demonstrating the high dependence of free-to-air channels and the need for the entry into force of the new Community Directive (see section 1.5. Communication policies). In 2018 there

[13] Os portugueses e as redes sociais 2018. Retrieved on February 24, 2019 from https://www.marktest.com/wap/private/images/Logos/Folheto_Portugueses_Redes_Sociais_2018.pdf.

[14] Global Connectivity Index. Retrieved on February 24, 2019 from https://www.huawei.com/minisite/gci/en/country-profile-en.html.

[15] Apit. Retrieved on February 24, 2019 from http://www.apitv.com/.

[16] Created in 1996, the Association of Independent Producers of Portugal has the mission of defending the rights and interests of these producers, seeking to orient and discipline their activity and ensure their prestige and quality.

was a slowdown in business volume in general terms, with television being the main activity, especially entertainment and fiction. Forty three percent of companies produced multiplatform content, although the first screen is always television, and it is believed that this number will grow in the coming years, due to the increase in consumer demand, as well as internationalization, a strategy understood by 74% of companies as a force line for the business. Still according to the study, the prospects of the sector are positive, especially due to the new directive and internationally agreed deals.

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

Table 1. Fiction shown in 2018 (national and imported; premiere and reruns; co-productions)

PREMIERE NATIONAL TITLES – 19 **RTP1 – 8** *1986* (series) *3 Mulheres* (series) *Circo Paraíso* (series) *Excursões Airlino* (series) *O Sábio* (*telenovela*) *País Irmão* (series) *Soldado Milhões* (miniseries) *Verão M* (series) **RTP2 – 2** *Sara* (series) *Idiotas, Ponto* (series) **SIC – 4** *Espelho d'Água* (*telenovela*) *Paixão* (*telenovela*) *Alma e Coração* (*telenovela*) *Vidas Opostas* (*telenovela*) **TVI – 5** *A Herdeira* (*telenovela*) *Jogo Duplo* (*telenovela*) *Valor da Vida* (*telenovela*) *A Teia* (*telenovela*) *Onde está Elisa?* (series)	**PREMIERE IMPORTED TITLES – 7** **RTP1 – 2** *Getúlio* (miniseries – Brazil) *Sob Pressão* (series – Brazil) **SIC – 5** *A Força do Querer* (*telenovela* – Brazil) *O Outro Lado do Paraíso* (*telenovela* – Brazil) *Segundo Sol* (*telenovela* – Brazil) *Buuu: um Chamado para a Aventura* (series – Brazil) *O11CE* (series – Argentina) **RERUNS – 47** **RTP1 – 19** *A Família Ventura* (series) *A Noite do Fim do Mundo* (miniseries) *A Rapariga da Máquina de Filmar* (TV movie) *Almas Penadas* (TV movie) *Aqui tão Longe* (series) *De Mal a Pior* (sitcom) *Dentro* (series) *Filha da Lei* (series) *Kutame – Destino Lisboa* (TV movie) *Madre Paula* (series)

	Maternidade (series) *Mau Mau Maria* (miniseries) *Noite Sangrenta* (miniseries) *Offline* (TV movie) *República* (miniseries) *Sim, Chef!* (series) *Sinais de Vida* (series) *Último Verão* (TV movie) *Virados do Avesso* (miniseries) **RTP2 – 5** *Bem-Vindos a Beirais* (long series) *Os Nossos Dias* (soap opera) *Liberdade 21* (series) *4 Play* (series) *João Semana* (series) **SIC – 7** *Coração d'Ouro* (*telenovela*) *Até Amanhã Camaradas* (miniseries) *Camilo, o Presidente* (sitcom) *Lua Vermelha* (juvenile series) *Sol de Inverno* (*telenovela*) *Poderosas* (*telenovela*) *Uma Aventura* (juvenile series) **TVI – 16** *Amanhecer* (*telenovela*) *Anjo Meu* (*telenovela*) *Campeões e Detectives* (juvenile series) *Casos da Vida* (unitary) *Detective Maravilhas* (juvenile series) *Espírito Indomável* (*telenovela*) *Filha do Mar* (*telenovela*) *Inspector Max* (series) *Jacinta* (miniseries) *Mar de Paixão* (*telenovela*) *O Amor é um Sonho* (miniseries) *O Bando dos 4* (series) *Olhos de Água* (*telenovela*) *Redenção* (*telenovela*) *Remédio Santo* (*telenovela*) *Sedução* (*telenovela*) **TOTAL OF PREMIERE TITLES: 27** **TOTAL OF RERUN TITLES: 47** **TOTAL OF SHOWN TITLES: 74**

Source: Obitel Portugal – Marktest MediaMonitor

There has been a decline in the total supply of domestic titles in the last three years (from 25 in 2016 to 19 in 2018). RTP1, following a policy of production increase, presented, during the three years, 32 titles, consecrating itself as the channel with greater supply. Nevertheless, there has been a decrease in the last three years (from 13 in 2016 to eight in 2018), a reality for which the change of the station administration in 2018 may have contributed. In the second place – in the three years and in 2018 – came TVI, followed by SIC, with a constant supply (four titles in each year), all at prime time in two lines of fiction. The other channels explored other targets, thus other formats and transmission times.

The offer of Ibero-American fiction continued to be present in RTP1, with the series *Sob Pressão* and with the film transformed into miniseries *Getúlio*, and in SIC, channel that holds the agreement of transmission of Globo products. In the last eight years, these contents have lost their programming space for Portuguese *telenovelas*, which are now in a smaller number and out of prime time, which helps to understand the decrease in supply over the last three years (from ten in 2016 to five in 2018). The reruns continued to play a major role in the programming of all stations, with RTP increasing its use (from one title in 2016 to 19 in 2018), with SIC decreasing and TVI maintaining in the 16 titles.

Table 2. The premiere fiction shown in 2018: country of origin

Country	Titles	%	Chapters/ episodes	%	N. of hours	%
NATIONAL (total)	**19**	**73.1**	**2613**	**86.1**	**754:40:00**	**73.4**
OBITEL COUNTRIES (total)	**7**	**26.9**	**423**	**13.9**	**273:45:00**	**26.6**
Argentina	1	3.8	40	1.3	15:00:00	1.5
Brazil	6	23.1	550	18.1	258:45:00	25.2
Chile	0	0.0	0	0.0	0:00:00	0.0
Colombia	0	0.0	0	0.0	0:00:00	0.0
Ecuador	0	0.0	0	0.0	0:00:00	0.0
Spain	0	0.0	0	0.0	0:00:00	0.0
USA (Hispanic production)	0	0.0	0	0.0	0:00:00	0.0

Mexico	0	0.0	0	0.0	0:00:00	0.0
Peru	0	0.0	0	0.0	0:00:00	0.0
Portugal	19	73.1	2613	86.1	754:35:00	73.4
Uruguay	0	0.0	0	0.0	0:00:00	0.0
Venezuela	0	0.0	0	0.0	0:00:00	0.0
CO-PRODUCTIONS (total)	**0**	**0.0**	**0**	**0.0**	**0:00:00**	**0.0**
Portuguese co-productions	**0**	**0.0**	**0**	**0.0**	**0:00:00**	**0.0**
Co-productions between Obitel countries	**0**	**0.0**	**0**	**0.0**	**0:00:00**	**0.0**
GENERAL SUM	**26**	**100.0**	**3036**	**0.0**	**1028:25:00**	**100.0**

Source: Obitel Portugal – Marktest MediaMonitor

Despite the decrease in the number of titles observed in the last three years, there has been an increase in the number of chapters/episodes (+35%), showing the tendency for the increase of serial dimension of the titles that remain, usually, about a year in antenna, divided in seasons. This variation was not accompanied by the volume of hours, which decreased 61% between 2016 and 2018. With regard to products from the Ibero-American area and following the decline in the supply of titles over the years, there was a decrease in the number of chapters/episodes and, consequently, the volume of hours. However, in 2018, it was observed, on one hand, the appearance of an Argentinean title and, on the other hand, a diversification of genres and targets, with the supply of two titles directed to children and teenagers.

Table 3. Formats of national and Ibero-American fiction

Format	National						Ibero-American					
	Titles	%	C/E	%	H	%	Titles	%	C/E	%	H	%
Telenovela	9	47.4	2439	93.3	652:15:00	86.4	3	42.9	359	84.9	245:00:00	0.9
Series	9	47.4	171	6.5	100:05:00	13.3	4	57.1	64	15.1	28:45:00	0.1
Miniseries	1	5.3	3	0.1	2:20:00	0.3	0	0.0	0	0.0	0:00:00	0.0
TV movie	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0	0:00:00	0.0
Unitary	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0	0:00:00	0.0
Docudrama	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0	0:00:00	0.0
Others (soap opera, etc.)	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0	0:00:00	0.0
Total	**19**	**100.0**	**2613**	**100.0**	**754:40:00**	**100.0**	**7**	**100.0**	**423**	**100.0**	**273:45:00**	**1.0**

Source: Obitel Portugal – Marktest MediaMonitor

The *telenovela* has always been consecrated as the format of election of the free- to-air Portuguese television. However, in the last three years and due to the initiative of the public service station, other formats, in particular series and miniseries, began to appear more expressively. The latter is associated, in most cases, with the transformation of cinematographic feature films, supported by RTP. Products of Ibero-American origin (Brazil and Argentina) were divided between the *telenovela* and the series, reaching the audience used to the Brazilian content, but also to a younger audience who did not grow up with these contents.

Table 4. The ten most watched titles

	Title	Country of the original idea or script	Chan-nel	Format/ genre	N. of chap./ ep. (in 2018)	Time slot	Rating	Share
1	*A Herdeira*	Portugal	TVI	*Telenovela*/ drama	458	Prime time	13.1	27.9
2	*Valor da Vida*	Portugal	TVI	*Telenovela*/ drama	154	Prime time	11.1	24.4
3	*Paixão*	Portugal	SIC	*Telenovela*/ drama	410	Prime time	11.0	23.7
4	*Alma e Coração*	Portugal	SIC	*Telenovela*/ drama	164	Prime time	9.6	21
5	*Espelho d’Água*	Portugal	SIC	*Telenovela*/ drama	205	Prime time	8.5	23
6	*Jogo Duplo*	Portugal	TVI	*Telenovela*/ drama	454	Prime time	8.4	23.4
7	*A Teia*	Portugal	TVI	*Telenovela*/ drama	65	Prime time	8.0	23.6
8	*Vidas Opostas*	Portugal	SIC	*Telenovela*/ drama	415	Prime time	7.5	21.1
9	*O Outro Lado do Paraíso*	Brazil	SIC	*Telenovela*/ drama	228	Prime time	5.8	23.3
10	*Soldado Milhões*	Portugal	RTP	Miniseries/ drama	3	Prime time	5.3	11.4
Total of productions: 10				**Foreign scripts: 1**				
100%				10%				

Source: Obitel Portugal – Marktest MediaMonitor

Just as happened in 2017, the Brazilian *telenovela* returned to occupy the table of the top ten – *O Outro Lado do Paraíso* – by the hand of SIC. However, the difference in audimetric terms in relation to products of national origin continues to be significant, showing the vitality of the national sector.

Table 4a. The ten most watched national titles

	Title	Country of the original idea or script	Channel	Format/ genre	N. of chap./ ep. (in 2018)	Time slot	Rating	Share
1	*A Herdeira*	Portugal	TVI	*Telenovela*/ drama	458	Prime time	13.1	27.9
2	*Valor da Vida*	Portugal	TVI	*Telenovela*/ drama	154	Prime time	11.1	24.4
3	*Paixão*	Portugal	SIC	*Telenovela*/ drama	410	Prime time	11.0	23.7
4	*Alma e Coração*	Portugal	SIC	*Telenovela*/ drama	164	Prime time	9.6	21
5	*Espelho d'Água*	Portugal	SIC	*Telenovela*/ drama	205	Prime time	8.5	23
6	*Jogo Duplo*	Portugal	TVI	*Telenovela*/ drama	454	Prime time	8.4	23.4
7	*A Teia*	Portugal	TVI	*Telenovela*/ drama	65	Prime time	8.0	23.6
8	*Vidas Opostas*	Portugal	SIC	*Telenovela*/ drama	415	Prime time	7.5	21.1
9	*Soldado Milhões*	Portugal	RTP	miniseries/ drama	3	Prime time	5.3	11.4
10	*Excursões Airlino*	Portugal	RTP	Series/comedy	26	Prime time	3.0	7.5
Total of productions: 10				**Foreign scripts: 0**				
100%				0%				

Source: Obitel Portugal – Marktest MediaMonitor

The national top ten integrated productions of the three free-to-air channels, an intermittent reality over the years, with SIC gaining space (five titles), TVI reducing its presence (four titles) and RTP managing to place two titles (a drama and a comedy). Some of the titles came from the previous year, showing not only the bet on long seriality, but also the ability to retain audiences over many months (*Paixão*, SIC, went from 5th to 3rd; *Espelho d'Água*, SIC, went from 9th to 5th; and *Jogo Duplo*, TVI, went from 7th to 6th). *Soldado Milhões* (RTP), in ninth place, was a feature-length film inspired by real events and produced with the support of the public service station, which debuted in theaters in April and on television in November in miniseries format (three chapters).

Table 5. Audience profile of the ten most watched titles: gender, age, socioeconomic level

Titles		Channel	Gender %		Socioeconomic level %				
			Women	Men	A	B	C	D	E
1	*A Herdeira*	TVI	60.3	39.7	1.7	10.4	12.9	42.8	32.2
2	*Valor da Vida*	TVI	60.8	39.2	1.1	9.6	10.0	42.7	36.6
3	*Paixão*	SIC	63.9	36.2	2.8	13.2	15.5	40.8	27.7
4	*Alma e Coração*	SIC	65.5	34.5	1.9	11.2	16.1	44.2	26.6
5	*Espelho d'Água*	SIC	65.7	34.3	2.1	11.4	16.9	43.1	26.5
6	*Jogo Duplo*	TVI	59.1	40.9	1.3	11.1	10.7	40.7	36.2
7	*A Teia*	TVI	61.2	38.8	0.8	9.6	10.2	41.3	38.2
8	*Vidas Opostas*	SIC	68.1	31.9	2.6	10.9	16.4	44.7	25.4
9	*Soldado Milhões*	RTP	50.4	49.6	3.4	16.8	17.6	44.8	17.4
10	*Excursões Airlino*	RTP	54.1	45.9	3.1	15.4	15.1	43.5	22.9

Titles		Channel	Age group %							
			4 to 14	15 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65 to 74	75 or +
1	*A Herdeira*	TVI	7.1	9.1	11.3	11.6	14.8	18.9	15.3	12.1
2	*Valor da Vida*	TVI	6.2	6.3	11.2	10.6	14.8	18.5	17.5	15
3	*Paixão*	SIC	5.4	5.0	10.6	11.6	16.6	18.4	20.1	12.4
4	*Alma e Coração*	SIC	4.4	6.7	8.5	12.3	17.5	19.2	17.4	14
5	*Espelho d'Água*	SIC	3.8	4.7	11.1	11.9	17.8	16.8	21.5	12.3
6	*Jogo Duplo*	TVI	5.5	8.7	13.3	10.8	15.5	19.2	16	11

7	*A Teia*	TVI	5.8	7.7	13.2	10.5	15.9	19.4	16.1	11.3
8	*Vidas Opostas*	SIC	4.2	6.0	9.9	13.0	17.5	18.3	17.8	13.2
9	*Soldado Milhões*	RTP	7.2	4.9	8.3	11.8	13.0	16.3	20.2	18.3
10	*Excursões Airlino*	RTP	3.9	5.2	8.4	9.9	13.7	16.3	20	22.6

Source: Obitel Portugal – Marktest MediaMonitor

Women continued to prefer *telenovela*, especially those of SIC, with men showing preference for the stories produced by TVI. RTP series, in particular the miniseries *Soldado Milhões*, showed an insignificant gender difference. Although there is an increase in the audience of the lowest socioeconomic classes in all productions, especially in class D, the alignment with the channel profile of the viewers is clear, with SIC raising more audiences among the higher classes and TVI among the lower classes. RTP productions are those that present a greater index of audience within the classes A and B, confirming the statute and the designs of the national public service.

As for the age groups, it is interesting to verify the transversality of the *telenovela* format, when pleasing to a family audience, therefore, constituted by multiple ages. Nevertheless, there is a preference among individuals between the ages 45 and 64. *A Herdeira* (TVI), consistent with what was verified in 2017, was the title that most pleased children and young audience (4-24) due to the inclusion of young actors in the cast and extreme activity in social networks.

3. Monitoring VoD in 2018

Since 2011, the Observatory of Communication (OberCom)[17] has been reporting on a constantly changing market, partly motivated by the possibilities of supply, but above all by the heterogeneity of

[17] Obercom. Accessed on March 12, 2019 from https://obercom.pt/svod-subscription-video-on-demand-mercado-prospectiva-e-cenario-de-futuro-para-portugal/.

demand. As we have seen in past compendiums, consumer practices and the relationship with audiovisual content have undergone profound changes, which have accompanied the evolution of the digital world. The model of a networked system of screens is no longer a forecast, confirming itself unequivocally. It is therefore imperative to reflect on new contours of analysis, in the light of the changes that have taken place over the last seven years in the dynamics of consumption, especially in the provision of *à la carte* content, without advertising commitments, which reposition the user experience – from consumer to controller of audiovisual experience.

Chart 2. VoD in Portugal

	Platforms	Total
VoD linked to open TV networks	RTP Play, TVI Player	2
VoD linked to pay TV networks	Fox Play, Fox+, AXN Now, Disney on Demand	4
VoD linked to telecom companies	NOS Play, Mini NOS Play, NOS TV, Video Clube NOS, MEO SÉries, MEO Go, Video Clube MEO, App Vodafone, Video Clube Vodafone, App Nowo, Video Clube Nowo	11
VoD without link to TV networks	Netflix, Amazon Prime Video, FilmIn, Mubi, YouTube Premium	5
TOTAL SUM		**22**

Source: Obitel Portugal

In 2018, 22 VoD[18] platforms were identified, with the telcos supply ranked first (11), followed by the offer without links (5) and the offer linked to television network (4). Finally, we identified the supply of the free-to-air channels – RTP Play, of the public service station, and TVI Player, of the commercial channel TVI. We will develop this theme in section 6, when we focus on the theme of the year.

[18] Compilation through authors' research.

3.1. Profits from VoD systems

In a line that was previously only of the future, video on demand (VoD) is assuming a clear leading role in the audiovisual market. Global VoD services revenue is estimated to have reached 17.063 billion euros in 2018, compared to 11.685 in 2016, according to Statista's platform Digital Market Outlook.[19] The same source anticipates that revenues exceed the 20 billion barrier in 2021, reaching 20.821 billion in 2022, a fact that allows us to gauge the potential of this type of service and the high penetration rate. In Portugal, the market size of VoD reached, in 2018, 6.54 million euros.

In terms of number of users of this type of system, the report estimates, based on trends for the global market, that the number of Portuguese using this type of resource in 2022 will be 217,854, an increase of 47,674 users compared to 2018. This report also notes that about two-thirds of users watched Netflix content outside the house in the last year, behind only Italy and Spain. About 60% of these "on-the-go" users also say they have caught other people peeking at their screen[20]. It is therefore common to see Portuguese in public places, such as public transportation, restaurants and gardens, consuming Netflix as a preferred form of entertainment. In fact, the Portuguese catalog of the Netflix platform was, in 2018, five times bigger than it was in 2015. In terms of content, the Portuguese audience prefers comedy and romance to action films.

Besides Netflix, that has more expression, Amazon Prime Video, Fox Play, NOS Play and NOS TV and MEO GO apps also allow users to watch television inside and outside the house. Also, the entry of new international services, such as HBO (2019), in the Portuguese VoD service promises to stir the national market. It should also be noted that a study carried out in France by Ernst &

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[19] Obercom. Accessed on March 12, 2019 from https://obercom.pt/wp-content/uploads/2019/01/SVOD_MERCADO.pdf.

[20] Jornal Público. Accessed on March 12, 2019 from https://www.publico.pt/2018/06/22/tecnologia/noticia/portugueses-sao-dos-paises-que-mais-veem-netflix-em-publico-1835493.

Young contradicts the idea that OTT systems are robbing cinema audiences, by attesting that those who have been to the cinema the most for a year were the ones who have watched the longest hours in streaming.[21]

3.3. Analysis of VoD in 2018: national and Ibero-American premiere fiction

In 2018, the European Parliament has set out amendments that, after being transposed into the Portuguese legal framework, may introduce an interesting dynamic in the paid streaming market. It is stipulated that 30% of the contents available in catalog are of European production, raising serious questions about the quality of productions chosen by the players in terms of relevance and diversity of contents.[22] Netflix's overall budget for 2018, however, is estimated at 8 billion dollars (nearly 7 billion euros), 85% of which earmarked for the production of original content.[23] This increase in the volume of investment, compared to previous years, has also motivated the platform's ability to recruit talent in several areas, being observed a large flow of professionals who abandoned traditional production companies in search of bigger budgets and opportunities in the streaming market. On the other hand, the platform's worldwide expansion strategy was based on the establishment of co-production partnerships with national players, which resulted in such phenomena as the thriller *Dark* (Germany), *Fauda* (Israel) or *La Casa de Papel* (Spain). The two last titles are television productions in their first seasons.

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[21] Diário de Notícias. Retrieved on March 12, 2019 from https://insider.dn.pt/noticias/estudo-streaming-netflix-matar-cinema/.

[22] Parlamento Europeu. Retrieved on March 12, 2019 from http://www.europarl.europa.eu/news/en/press-room/20180925IPR14307/new-rules-for-audiovisual-media-services-approved-by-parliament.

[23] Obercom. Retrieved on March 12, 2019 from https://obercom.pt/wp-content/uploads/2019/01/SVOD_MERCADO.pdf.

Portuguese supply in Netflix is still quite limited when compared with other countries. The Portuguese content available in this streaming service is limited to: *Salvador Martinha – Na Ponta da Língua*, the only Portuguese comedian in its catalog with the first content created from scratch in Portugal (2016) for the platform; *Aquele Querido Mês de Agosto*, by Miguel Gomes, a feature film, a mixture of documentary and fiction, which toured the circuit of the international film festivals; and *José e Pilar*, by Miguel Gonçalves Mendes, a documentary, filmed between 2006 and 2009, which recounts the daily life of the Nobel Prize for Literature José Saramago in his relationship with his wife, Pilar, shortly before his death. These three titles are Netflix acquisitions, not own productions. In the year of debut, it also made available SIC *telenovelas Mar Salgado* and *Rosa Fogo* and the series *Sal* and *Lua Vermelha.* In Amazon Prime Video, which debuted in Portugal a year after Netflix, there is no fictional content available, only sports documentaries produced by SIC in 2010 and 2012, a short film and a feature film for the American and British markets.

Table 6. National and Ibero-American fictions exhibited in 2018 in VoD system

Premiere national titles	Premiere Ibero-American titles	Co-productions
Netflix – 0 RTP Play – 3 1. *Casa do Cais 1* (series) 2. *Appaixonados* (series) 3. *Subsolo* (series)	**Netflix – 19** **Argentina** 1. *O Marginal* (series) **Brazil** 2. *Z4* (series) **Chile** **Colombia** 3. *La Reina del Flow* (*telenovela*) 4. *A Lei Secreta* (series) **Spain** 5. *Elite* (series) 6. *Las Chicas del Cable* (series)	0

	7. *Velvet Colección* (series) 8. *Fariña* (series) 9. *Viver sem Permissão* (series) 10. *Fugitiva* (series) **United States** 11. *Falsa Identidad* (*telenovela*) 12. *Nicky Jam: el Ganador* (series) 13. Narcos: México (series) **Mexico** 14. *El Chapo* (series) 15. *La Casa de las Flores* (series) 16. *Caçador de Demónios* (series) 17. *Ingovernáveis* (series) 18. *O Recluso* (series) 19. *Made in Mexico* (series)	
Total: 3	**Total: 19**	**Total: 0**
TOTAL SUM: 22		

Source: Obitel Portugal

Table 7. Premiere fiction in VoD in 2018: countries of origin

Country	Titles	%
NATIONAL (total)	**3**	**13.6**
OBITEL COUNTRIES (total)	**19**	**86.4**
Argentina	1	4.5
Brazil	1	4.5
Chile	0	0
Colombia	2	9.1
Ecuador	0	0
Spain	6	27.3
USA (Hispanic production)	3	13.6
Mexico	6	27.3
Peru	0	0
Portugal	3	13.60
Uruguay	0	0
Venezuela	0	0
CO-PRODUCTIONS (Total)	0	0
Portuguese co-productions	0	0
Co-productions between Obitel countries	0	0
TOTAL	**22**	**100%**

Source: Obitel Portugal

In 2018, the OTT platform that stood out in the broadcasting of Ibero-American content was Netflix, with the supply of 19 titles in debut. Nationally, only RTP Play, through RTP Lab, presented three titles and it is preparing to debut four more titles in 2019. Fifty percent of the Obitel Countries were present in the Portuguese catalog, with Spain and Mexico equaling (six titles), followed by the USA (three), Colombia (two) and Argentina/Brazil (one).

Table 8. Formats of national and Ibero-American fiction in VoD

Formats	National				Ibero-American			
	Titles	%	C/E	%	Titles	%	C/E	%
Telenovela	–	–	–	–	2	10,5	173	38,1
Series	–	–	–	–	17	89,5	281	61,9
Miniseries	–	–	–	–	–	–	–	–
Unitary	–	–	–	–	–	–	–	–
Total	**–**	**–**	**–**	**–**	**19**	**100**	**454**	**100**

Source: Obitel Portugal

Although not subject to analysis, the TV movie format was the most used by most of the countries, including Chile, Peru and Uruguay. Of the titles presented, 17 were series, with Mexico and Spain presenting the highest number of titles, some of them with great worldwide penetration. The *telenovela* format was also present with *La Reina del Flow* (Colombia), a story about a *reggaeton* star, produced by Teleset and Sony Pictures Television for Caracol Television, and with *Falsa Identidad*, produced by NBC Universal Telemundo. Most series have more than one season and their length is generally standard – 13 episodes –, with some titles with only eight episodes. The content of Portuguese origin is aimed at a younger age group, proposing marginal life histories, which are little or not at all portrayed in the free-to-air channels.

4. Fiction analysis: open TV, VoD and transmedia expressions in networks

Throughout these years of research, it has become apparent that the interaction of fans with their favorite TV products continues to be limited to the comments made on digital platforms. Facebook is still the most used social network in Portugal for participation of the audience and for the release of information by the broadcaster. These comments, for the most part, express emotion, and the themes of the posts are related to the outcome of the story, the quality of the production and the content.

In the year 2018, RTP, as a public service, continued to stimulate creativity and innovation. Through RTP Play, it made available several innovative formats that came from the RTP Lab platform, the experimental laboratory of the public station which gave voice to new forms of content production, thought in a multiplatform logic. Thus, a consultation of contents, directed to the entire public, was made in search of genres of fiction and humor that used new forms of narrative in exclusively digital environments. After the application of several projects, RTP chose four that were born and lived solely in the digital environment.

The miniseries *Amnésia*, which debuted in October 2017, already highlighted last year, gave way to the second webseries from RTP Lab, #*CasadoCais*, available on RTP Play and on YouTube. By Ana Correia, Helena Amaral, André Mariño, Soraia Carrega and Francisco Soares, this series, which is controversial but modern, portrays the life of five friends (four of them youtubers) who share the same house in the Portuguese capital. With only ten episodes lasting 15 minutes each, #*CasadoCais* had a great impact on the media by the way some themes were approached, without any taboos, portraying the reality of the young people of this new millennium (sex, drugs, job search, self-discovery and maturity).

Following the success of *#CasadoCais*, RTP Lab debuted *Subsolo*, made by five young filmmakers who sign each episode. This miniseries talks about a new generation: five young people in different ages and contexts who seek affirmation in social networks, live with a distorted view of themselves and seek something truer and more satisfying than their own lives. This webseries, of five episodes with 12 to 14 minutes each, all by Videolotion production company, was only made available on RTP Play and on YouTube, allowing, therefore, greater interactivity and participation by the audience.

On February 27, 2018 *Appaixonados* premiered, which, more than a webseries to see on the internet, is an application for the smartphones and tablets. Guilherme Trindade, who co-created the series-app with John Harrington Sena, defined it as "an interactive romantic comedy".[24] Each week, Ana Amorim, the main character, goes out with a different person chosen by the audience who, in cupid mode, follows the plot through the app. In this immersive way, through the app, the audience has access to the presentation videos of each potential candidate, also available on YouTube, where episodes can be viewed in high definition. Throughout ten episodes of five minutes each, Ana will have ten dates with both men and women, in a way to naturalize gender issues, where the suitors can be poets, YouTube stars, entrepreneurs, geeks, hippies, ventriloquists, among others. *Appaixonados* won the Prix Italia 70 in the category Web Entertainment, announced on September 28, 2018.

5. Highlights of the year

As indicated by the chapter's name, the market experienced a sort of "sabbatical year" in fictional television production. *Telenovelas* maintained a rhythm of constant production, with two to three lines of TV programming during six days a week, not being evident, on the part of commercial channels, the experimentation of other formats. The market dynamics, strongly marked by competition, did not leave room in the TV programming to innovate in fiction, however, there are some changes in the area of entertainment – the debut of big formats of entertainment in the three channels and the migration of stars.

RTP opted for gastronomic competition formats, and the commercial channels, in line with international trends, opted for dating formats, revealing the chained premiere of titles throughout 2018 and dragging to 2019. In parallel, SIC, second place in the ranking,

[24] Jornal Público. Retrieved on March 14, 2019 from https://www.publico.pt/2018/03/06/culturaipsilon/noticia/appaixonados-a-comedia-romantica-que-e-a-aplicacao-1805631.

without changes in 14 years, hired Cristina Ferreira, becoming, up until now, one of the most controversial contracts in the Portuguese audiovisual scene, leading SIC, at the beginning of 2019, in conjunction with other changes in the schedule, to a higher place in the ranking of television audiences. Owner of an "almost empire", the TV presenter has been guaranteeing her daily presence on the screen in recent years, in addition to having a magazine (*Cristina*), a blog (Daily Cristina), a multimedia channel/app (in partnership with Samsung, of fashion content, lifestyle and interviews, with exclusive access to her magazine content), a clothing store, a line of shoes, a perfume, gel nail polishes and several published books.

Within this context, and following the performance of the last three years with the production of series, the highlight goes to the premiere of three titles of biopic format and genre: *3 Mulheres*, *Soldado Milhões* and *Sara* – two period titles, but at the same time historical, and a title unrolled in the present. *3 Mulheres* debuted in October 2018 and had 13 episodes. The remarkable and intertwined stories of Natália Correia – poetess and deputy who never concealed her disagreement with the regime of Snu Abecassis, the first woman editor and of journalist Vera Lagoa (pseudonym of Maria Armanda Falcão), responsible for scathing chronicles about the society of the time in the newspaper *Diário Popular* and founder of the weekly newspaper *O Diabo* – were transposed to the small screen, showing the viewer the last years of *Estado Novo* (1961-1973) (Portuguese dictatorship regime), the beginning of the colonial war until the eve of the military coup of April 25, 1974. Produced by David & Golias, an independent production company, with original idea by Fernando Vendrell and Elsa Garcia, script by Fátima Ribeiro and Luís Alvarães and directed by Fernando Vendrell, it obtained, in the ten episodes transmitted, 1.9% of rating and 5.3% of share. The broadcast was made in prime time (10 p.m.) on Fridays, in 45-minute episodes, being available for online consumption on RTP Play.

Soldado Milhões, the title that occupied the ninth place in the table of the national top ten, told the true story of Aníbal Augusto

Milhais, a soldier who, in 1918, in the battle of La Lys, faced alone a German offensive. This achievement guaranteed him the highest national military decoration – the *Ordem de Torre e Espada* (Order of Tower and Sword). With a budget of almost one million euros, the production was carried out by Gonçalo Galvão Teles and Jorge Paixão da Costa, with the support of RTP, thus guaranteeing its transmission in three chapters on television in November, after the debut in cinema on April 12. The number of viewers reached by the miniseries (520 thousand viewers) was 18% higher than the channel average for that time and 6% higher than the channel market share.

6. Theme of the year: television distribution models by the internet: actors, technologies, strategies

It was in April 1994 that Portugal, in a generalized way, saw the internet working. In a seminar entitled Portugal on the Internet, developed by national scholars, it was realized that the technology born and raised in the United States in the 1970s, primarily for military purposes, was becoming globalized and allowing the regular citizen to connect, quickly and immediately, with the rest of the world. Prior to the emergence of internet service providers (ISPs) in 1994, elite-only access took place through an international connection to Amsterdam developed by an association of users of Unix operating systems. Accessing e-mail, at speeds a thousand times lower than today, costed about 90% more than the price of a optical fiber triple play package supplied by any of the telecommunications operators in Portugal today. By 2017, the number of subscribers to internet access rose by 3,812%[25], being present in 79% of Portuguese households, numbers which are still below the European average.[26] Data from 2018 also show that, for the first time, internet use in

[25] Pordata. Retrieved on March 13, 2019 from https://www.pordata.pt/Portugal/Assinantes+do+acesso+%C3%A0+Internet-2093.
[26] TVI24. Retrieved on March 13, 2019 from https://tvi24.iol.pt/tecnologia/ine/internet-esta-em-quase-80-dos-lares-em-portugal.

smartphones (57.9%) exceeded the use of the internet in computers (55.2%). The main reasons cited by the study for growth are the greater availability of mobile internet packages, the democratization of smartphones and, for example, the increasing availability of mobile-only services, such as the case of bike and carsharing.[27]

The optical fiber, a technology that allows a greater volume of data to be transferred in high definition, is the most modern technology for accessing the internet and the most used in recent years, but it is not yet a reality in the entire Portuguese territory, nor is it the digital terrestrial television (DTT). In 2010, the European Commission issued a recommendation that gave national regulators legal power to strengthen fiber coverage, but in Portugal, although the issue was launched, asymmetry in coverage is still a reality. MEO-Altice has invested 2 billion euros in Portugal in the last four years, and a large part of that investment has been made in optical fiber networks, which, as in other countries, are considering selling the assets to other operators (the disposal of 49.99% of the business in 2019 is foreseen[28]). This could be a way to allow more effective coverage of the territory and at more competitive prices.

Information systematized by Anacom[29] for the first quarter of 2018 shows that optical fiber was the main form of fixed broadband internet access (42% of accesses), having grown 25.5% in the last year. Out of these accesses, 98.7% were made in connection with the contracting of a package made available by the four companies operating in the national territory, as previously mentioned: MEO-Altice, NOS, Vodafone and Nowo. In fact, Portugal dominates the bundling economy with the increasing availability of multiple play supply and exclusive accesses, making the contract of *solo* internet

[27] Sapo. Retrieved on March 13, 2019 from https://shifter.sapo.pt/2018/09/utilization-of-internet-em-portugal/.

[28] Sapo. Retrieved on March 13, 2019 from https://eco.sapo.pt/2019/02/05/altice-quer-vender-parte-da-rede-de-fibra-otica-em-portugal/.

[29] Anacom. Retrieved on March 13, 2019 from https://www.anacom.pt/render.jsp?contentId=1462004.

service an option with very little accession. This has, in our view, allowed us to move away from cord-cutting and cord-never[30] scenarios, so common in other geographies (Strangelove, 2015).

In 2015, another study showed that the Portuguese spent 4,2 hours a day on the internet, a number higher than the 3,1 hours watching television.[31] In this context, it is known that one in every ten Portuguese households has a television set with internet access (smartTV penetration of 13.6%), up by 8% compared to 2015.[32] Regarding television viewing on the internet, including fictional content, data from 2018 show that 1.139 million individuals aged 15 and over, living in mainland Portugal, watched online movies, series or documentaries, that is, more than two in every five Portuguese have shown the habit of doing so (Lotz, 2017). Still in this study, individuals identified Netflix, followed by YouTube and MEO Go as the privileged platforms to do so.[33] In fact, in the second half of 2017, 48.2% of people who were 10 and older were familiar with Netflix, the most popular platform, followed by Fox Play, NOS Play and Amazon Prime Video[34] (the penetration of OTT in the third quarter of 2018 stood at 8.1%). The penetration of these platforms is not very expressive yet, nor is it, for all age groups, non-linear consumption; the trend is that in 2020, according to a study developed by Ericsson, a balance between linear and non-linear consumption is achieved.[35]

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[30] Phenomena with a strong presence in the US mean, respectively, the cancellation of or the non-subscription to packages of channels offered by the telecommunications operators.

[31] Observador. Retrieved on March 13, 2019 from https://observador.pt/2015/01/14/sim-internet-ja-ultrapassou-tv/.

[32] Meios e Publicidade. Retrieved on March 13, 2019 from http://www.meiosepublicidade.pt/2018/11/penetracao-smart-tv-no-mercado-portugues-duplica-tres-anos/.

[33] Marktest. Retrieved on March 13, 2019 from https://www.marktest.com/wap/a/n/id~245d.aspx.

[34] Marktest. Retrieved on March 13, 2019 from https://www.marktest.com/wap/a/n/id~22a8.aspx.

[35] Sapo. Retrieved on March 13, 2019 from https://tek.sapo.pt/noticias/telecomunicacoes/artigos/portugal-esta-entre-os-mercados-de-televisao-mais-evoluidos-a-nivel-global.

Still according to this study, Portugal is well positioned in relation to other countries, in particular by the behavior of the younger generations, thus, more technological and interested in personalized content and consumption. Within this context, and in accordance with Chart 2, the Portuguese have at their disposal 22 "new" ways of accessing audiovisual content on demand and according to their needs. FTA channels offer the scarcest supply, with the public service channel emerging and gaining ground to commercial channels with RTP Play (SIC has not positioned itself in this segment and only makes content available on the website; TVI, with TVI Player, allows to watch live or review content broadcasted on all channels of the station).

Started in 2011, RTP Play showed the visionary side of the public service in Portugal as a collection of the content broadcasted on the station's television and radio channels, but also as a space for previews (in the case of *Terapia* in 2016, series whose episodes were available at lunch time online and on television at night) and for own and exclusive online production (such as *Amnésia* and *Subsolo*, theme developed in section 4.). RTP's ambition did not stop here: in its 2018-2020 strategic plan[36], it affirms digital as a priority and one of the objectives is "to transform RTP Play, creating a new platform for providing content on TV, like Netflix, Fox Play, to make RTP content available to audiences who prefer forms of consumption other than the linear one".

Subscription channels also offer VoD options, namely the channels dedicated to series: Fox Play (with access to Fox's channels content), Fox+ (available on NOS, Vodafone and Nowo, with access to the best Fox series, in multiscreen), AXN Now (full seasons, exclusive premieres, previews and 4K content) and, intended for children's audience, Disney on Demand. Notwithstanding, it is the telcos themselves that have the largest and most diversified offer –

[36] Plano Estratégico 2018-2020. Retrieved on March 13, 2019 from http://cdn-images.rtp.pt/mcm/pdf/5f2/5f2d4699d08b425d7548b4a1fce9b39b1.pdf.

four videoclubs, applications that allow accessing and viewing the library of channels on any screen and on the go (Meo Go, NOS TV, Vodafone app and NOWO app), and the series channel MEO Séries (started in October 2018 and with a subscription of 5 euros/month). N Play (NOS operator), however, appeared on the market weeks before the launching of Netflix, in October 2015, with the supply of a varied catalog of movies and series for the payment of 7.5 euros per month. At the same time, with the same extra price and for a younger audience, Mini N Play was launched.

Netflix, as mentioned above, is the most renowned streaming platform, with the highest penetration in Portugal, distinguishing itself from the others by its own productions and co-productions and, consequently, by providing content of multiple genres, formats and nationalities in three plans – basic (8.99 euros), standard (11.99 euros) and premium (14.99 euros) –, the main difference being the number of screens. A year later, in 2016, the Portuguese were also able to access the content of Amazon Prime Video and enjoy the shipping costs for a more affordable value (4.99 euros per month or an annual payment of 36 euros). At the end of 2018, it was YouTube's turn to launch YouTube Music (free) and YouTube Music Premium (6.99 euros/month) in Portugal, as well as YouTube Premium, with access to Google Music Premium and YouTube Originals by 8.49 euros. All paid versions have no advertising, being that in fact one of the most sensitive issues in the process of transition from the broadcasting experience to the narrowcasting (Hirst, Harrison and Mazepa, 2014) – to segment, satisfy all tastes and allow immersive viewing (Rose, 2012) without breaks, tailored to each individual.

One of the major problems affecting the sector, and not only in Portugal, is piracy. It is estimated that there are around 500 thousand unaudited boxes, in addition to numerous streaming services. Since 2015, the year of the establishment of an anti-piracy memorandum of understanding, an average of 50 websites were blocked per month. As a result of the arrival of OTT systems, which offer a lot of content at an affordable price, the numbers of boxes and illegal accesses, especially to foreign series still absent in Portugal, have been decreasing, however we are still dealing with a problem (Newman, 2011; Ganito, Burnay and Ferreira, 2012).

Faced with so many changes in the production, distribution and consumption of content, Portugal follows a continuity line, not observing significant changes in patterns and mold of the market-consumer dynamics. Nevertheless, the consumer-market dynamics has become changeable and adaptable, with content imposing on apparatus, as well as the on-demand and on-going techniques. A "market with eyes on the future", not totally aligned with the trends, can be overtaken, but we believe that the Portuguese market is in a phase of redefinition and preparation to face the challenges in a more conscious way.

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8

Spain: VoD drives national fiction

Authors:
Charo Lacalle, Beatriz Gómez, Mariluz Sánchez,
Cristina Pujol

Team:
Sara Narvaiza, Rosa Ferrer, Raquel Crisóstomo,
Tatiana Hidalgo, Berta Trullàs, Daria Dergacheva, Marta Albújar

1. Spain's audiovisual context in 2018

In 2018 Netflix's stimulus to Spanish VoD platforms became noticeable with the consolidation of pioneering companies and the arrival of new actors, multiplying the fictional programming offer and intensifying the competitiveness of the space. Pay TV beat its own record thanks to the increase in paid streaming OTT services. Meanwhile, and despite the sustained decline of lineal viewing, open TV, both national and autonomic, has maintained its audience level. The production of fictional programming by VoD platforms has aided premiere total numbers to return to levels prior to the economic crisis. It has also ratified some trends observed in recent seasons, such as the reduction in the number of episodes and the success of stories set in the past. The rise of the action-thriller, to the detriment of comedy, is another highlight of the year, both in the offer of pay television and in open TV.

The weighted annual audience index of the three large generalist networks (36.9%) is almost one point higher than last year's historical decline (36%). The autonomic channels also saw a slight increase in their audience, while pay TV reached a new record. Traditional linear viewing decreases amid the rise of the multiplicity of screens and the increase of internet consumption, although the commitment to conventional television continues to be very high.

1.1. Open television in Spain

Spain is one of the European countries with the largest number of free over-the-air television channels, whose competitiveness has been exacerbated this year by the rise of VoD.

Chart 1. Open TV networks in Spain

Reach	Public		Private	
	First channel	Second channel	First channel	Second channel
State[1] (national coverage)	La1	La2 24H Clan Teledeporte	Antena3, Cuatro, LaSexta, Tele5	Atreseries, BeMadTV, Boing, Disney Channel, Divinity, DKiss, DMax, Energy, FDF, Gol, Mega, Neox, Nova, Paramount Network, Real Madrid HD, Ten, Trece
Autonomic (regional coverage)	Á Punt, Aragón TV, CanalSur, CMM, ETB1, ETB2, Extremadura TV, IB3, La7 TV, Telemadrid, TPA, TV3, TV CAN, TVG	3/24, And-TV, CSur-And, Esport3, ETB3, ETB4, Galicia TV, IB3 Global, LaOtra, Super3/33, TPA2, TV3CAT, TVG2	8Madrid, 8TV, CYL7, Hit TV, La8, RAC105, TV Mediterráneo	

Source: Obitel Spain

Traditional television consumption regains the negative trend of recent years and drops to 234 minutes per viewer and day (six minutes less than in 2017), replicating the results of 2010. The decline in television consumption has been the usual pattern in Spain since 2012, except for 2017, when the measurement of the "guests"[2] factor was introduced and the trend was reversed. In 2018, consumption decreases in all age groups, except among those over 65

[1] Translator note: in the Spanish case, "state coverage" or "national coverage" refers 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.

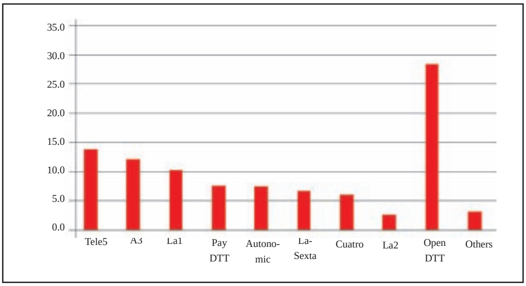
[2] Kantar Media understands as "guests" those viewers who do not live at home but watch some shows with the residents.

(who add two minutes compared to 2017), and acquires progressive relevance in the group of "young *viejenials*", or viewers of 50 to 64 years old.[3]

The main public and private television networks demonstrate their strength once again and maintain their level of annual demand. On the other hand, free over-the-air DTT channels reduce their screen share as a consequence, to a large extent, of the stagnation of the thematic channels introduced in the last concession distribution. Tele5 (14.1%) increases its 2017 results by eight-tenths and continues to be the most watched network for the seventh consecutive year. Next, we find Antena3 (12.3%), with the same result as in the previous year, and TVE (10.4%), which is one-tenth higher than in 2017. The thematic channels are down two-tenths (7.6%), although it is their second best result since 2009.

Graph 1. Share by state networks

Network	%
Tele5	14.1
A3	12.3
La1	10.5
Pay DTT	7.9
Autonomic	7.6
LaSexta	6.9
Cuatro	6
La 2	2.7
Open DTT	28.6
Others	3.4
TOTAL	**100**



Source: Barlovento Comunicación/KantarMedia

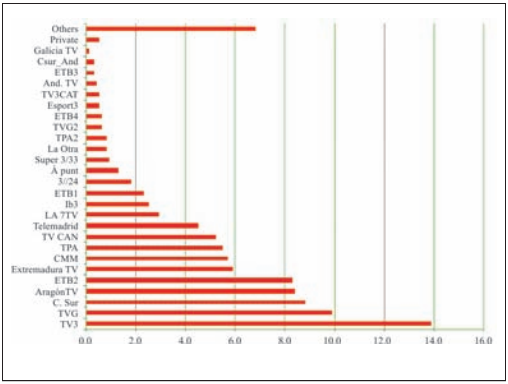
The increase of three-tenths of autonomic networks represents their best result over the last four years (7.9%). TV3 (13.9%) is once again the channel with the highest screen share (+2.2 points) and the most watched in its own autonomous community. On the other

[3] This group of viewers represents 21% of the population over 4 years old. See https://www.barloventocomunicacion.es/wp-content/uploads/2018/11/informe_Barlovento_Los-Viejenials-J%C3%B3venes-en-TV_2018.pdf.

hand, TVG (9.9%) and CanalSur (8.8%) decrease, although they are respectively in the second and third positions of the regional ranking. Another highlight of 2018 is the launch of the new Valencian channel À Punt, which is producing fiction in that autonomous community almost five years after the closure of the public network Canal Nou.

Graph 1a. Share by autonomic networks

Network	%
TV3	13.9
TVG	9.9
C. Sur	8.8
Aragón TV	8.4
ETB2	8.3
Extre. TV	5.9
CMM	5.7
TPA	5.5
TV CAN	5.2
Telemadrid	4.5
La7 TV	2.9
IB3	2.5
ETB1	2.3
3/24	1.8
À punt	1.3
Super3/33	0.9
La Otra	0.8
TPA2	0.8
TVG2	0.6
ETB4	0.6
Esport3	0.5
TV3CAT	0.5
And. TV	0.4
ETB3	0.3
Csur. And	0.3
Galicia TV	0.1
Private	0.5
Others	6.8
TOTAL	**100**



Source: Barlovento Comunicación/KantarMedia

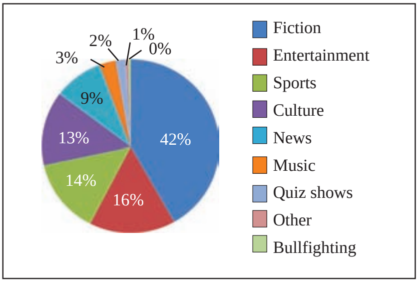
Mediaset (28.8%) leads again the business groups, with one-tenth more than in 2017, while Atresmedia (26.8%) increases three-tenths in relation to the previous year, but it remains in second position. CRTVE (16.5%) lost two-tenths compared to 2017 and Forta

(7.7%) recovered three. The two smallest groups, Vocento (2.9%) and Unidad Editorial (2.6%), experienced an increase of two and one-tenth respectively.

The distribution of time dedicated to each genre shows substantial changes compared to last year. Fiction (41.5%) increases two-tenths and continues to lead Spanish programming, especially in pay television (53%), followed at considerable distance by entertainment (16.1%), which increases 5.5 points. Sports (14%), cultural programs (13.3%), information (9.1%), music (2.9%) and quiz shows (2%) complete a landscape in which bullfighting and other genres have acquired a small quota (0.4%).

Graph 2. Offer by genre in TV programming

Genre	**%**
Fiction	41.5
Entertainment	16.1
Sports	14
Culture	13.3
News	9.1
Music	2.9
Quiz shows	2
Other	0.4
Bullfighting	0.4
TOTAL	**100**



Source: Barlovento Comunicación/KantarMedia

Thanks to the 2018 FIFA World Cup Russia, soccer has become, once again, the star of generalist TV programming, monopolizing 47 of the 50 most viewed broadcasts of the year. The three remaining broadcasts correspond to the voting and the Eurovision gala and to the End of the Year Bells of La1. No fiction production appears in the ranking, since the most watched fiction broadcast, corresponding to the premiere of *Cuerpo de Élite* (Antena3), obtained 4,193,000 viewers (24.6% share), almost 700 thousand less than the friendly soccer match between Germany and Italy that closes the ranking (4,892,000 viewers and 28.5% share).

In economic terms, 2018 has not been the best year for Mediaset and Atresmedia, due to the slowdown in advertising investment and the exponential growth of pay TV. Mediaset closed the first nine months of the year with a net profit of 146.9 million euros, 0.6% more than the same period last year[4], while Atresmedia's profits stand at 86,062 million euros, 16.8% less than in 2017.[5]

Public television did not have the best of times either, with an identical budget to that of 2017 for RTVE (343 million euros). In fact, the successive budget cuts during the harshest years of the crisis have contributed to Spanish public television, national and autonomic, being among the cheapest in the EU.[6]

1.2. Pay TV

DTT (75%) continues to be the main distribution system of television content in Spain, although pay television has obtained its best historical data this year (25%). This new record is mainly due to the increase of IPTV, which already represents 12% of the total viewing. Cable (10%), digital satellite (3%) and OTT (1%) have identical results to last year.

In June 2018, there were 6,643,479 households subscribed to any form of pay television[7], which implies that one out of every three families connected to the internet was subscribed to an audiovisual content platform. In addition, in the first half of the year, the revenues of pay television amounted to 1,111.84 million euros, 6.2% more than in the same period last year and 19% more than open television.[8] Movistar+ continues to be the leading company in the streaming OTT television mode (2,200,000 households and

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[4] See https://www.mediaset.es/telemania/empresas/empresas-nacionales/beneficio-mediaset-espana-nueve-meses_0_2655450091.html.

[5] See https://www.elespanol.com/economia/medios/20181025/beneficios-atresmedia-desploman-millones-euros/348215424_0.html.

[6] See https://elpais.com/sociedad/2018/11/08/actualidad/1541684574_037906.html.

[7] See http://data.cnmc.es/datagraph/jsp/inf_trim.jsp.

[8] Ibidem.

13.4% of all homes with payment platforms), but Netflix has grown exponentially (2,052,000 and 12.5%). Next we find Vodafone TV Online (950,000 and 5.8%), App Orange TV (741,000 and 4.5%), Amazon Prime Video (656,000 and 4%), HBO (478,000 and 2.9%) and Bein Connect (377,000 households and 2.3%), followed by Rakuten TV (147,000 and 0.9%) and Sky España (115,000 and 0.7%).[9]

1.3. Advertising investments of the year: in TV and in fiction

Advertising investment registered a slight growth between January and September (0.6%). Television, the medium with the highest budget, experienced a decrease of 1.3% compared to the same period of the previous year, while internet was consolidated as the second medium, with an increase of 12.8%. Free over-to-air TV channels fell by 1.2%, although the main victims were the regional channels (−12.3%). On the other hand, pay channels increased by 10.9% compared to 2017. Mediaset (658.5 million euros, −0.5%) and Atresmedia (617.2 million euros, −3.5%) maintain their share of the advertising market despite the negative evolution, with 84.6% of the total investment in television.[10]

The profitability of advertising investments often leads to networks violating the legislation and rethinking their promotional strategies. This year, the CNMC has fined TVE with more than 1 million euros for airing ads not allowed, the highest penalty in the history of RTVE.[11] The most relevant change is Atresmedia, eliminating the simultaneous broadcast of ads in its networks and the introduction of a new advertising structure during the TV series (three commercial breaks of three minutes each), a tactic similar to that used in the United States.

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[9] See https://blog.cnmc.es/2018/11/16/panel-de-hogares-cnmc-netflix-se-cuela-en-2--millones-de-hogares-en-espana/.

[10] See http://www.infoadex.es/home/la-inversion-publicitaria-crece-un-06-en-los-primeros-nueve-meses-del-2018/.

[11] See http://vertele.eldiario.es/noticias/TVE-multada-millon-publicidad-permitida_0_2023297661.html.

1.4. Merchandising and social merchandising

Spanish fiction continues to explore the possibilities beyond the small screen to promote its programs and increase the income. *La Casa de Papel* (Antena3, 2016-2017, currently on Netflix), winner of the first Emmy awarded to a Spanish fiction, has become the first Spanish series to inspire a line of puppets (Funko Pop!). The success of the series *Élite* (Netflix) has prompted the brand Pull & Bear to market sweatshirts and T-shirts with the series logo and "Las Encinas", the elite school where its protagonists go. Along the same lines, Ana Locking has designed a limited edition capsule collection inspired by *Arde Madrid* (Movistar+). In the autonomous community, the musical comedy of ETB1 *Go!Azen* continues betting on a promotion based on live performances, which culminated this year with the theatrical tour of the actors of the series.

1.5. Communication policies

After months of parliamentary blockade to implement Law n. 5/2017, to tackle the election of the Board of Directors of RTVE, the government approved a decree law to urgently renew the corporation that included the dismissal of the nine previous directors, among them President José Antonio Sánchez. A little more than a month later, the government managed to approve the appointment of journalist Rosa María Mateo as the sole provisional administrator of RTVE, who runs the public corporation until the public tender is resolved.

1.6. Infrastructure of digital and mobile connectivity

The introduction of new players in the Spanish television market has been a game changer. The competition has ceased to be the enemy to become an ally and business partner, as demonstrated in the launch in June of LOVEStv, a joint hybrid television project (based on Hybrid Broadcast Broadband technology – HbbTV) of RTVE, Atresmedia and Mediaset, which allows unlimited broadcast of content on TVs connected to the internet. The HbbTV services are the response of the main European public and private channels to the competition of the platforms, while trying to alleviate the decreasing availability of bandwidths destined to the emission of DTT channels because of the different digital dividends.[12] The integration of OTT in the field of classical television, aimed at increasing the broadcast business[13], proposes an enriched and interactive experience, which includes the same contents as DTT, but with alternative viewing options.

Atresplayer has also been updated, aiming to improve the user experience. The platform of Atresmedia, now with image and sound in 4K, offers new features such as live video broadcasting, content downloading, access to the entire offer of Atresmedia channels (including Flooxer and Novelas Nova) of the last seven days, original version with subtitles, a personalized recommendation system, etc. In addition, the Premium subscription allows users to view the contents without commercial breaks.

1.7. Independent producers

Netflix announced in July its first European production headquarters, in Madrid, with the Secuoya group as their exclusive production services partner for all projects developed in Spain (20 active in 2018).[14] The North American platform has also signed an agreement with Mediaset and Warner Bros to produce a series on drug trafficking, *Brigada Costa del Sol*, which will first be aired on Tele5 and then offered in the rest of the countries through the platform. The signing in exclusivity of Álex Pina, creator of *La Casa de Papel*, also highlights Netflix's commitment to original productions. Pina's production company, Vancouver Med, will develop for

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[12] LOVEStv has received the 2018 HbbTV 2018 award to best platform, granted by HbbTV Association and Deutsche TV-Plattform.

[13] See https://www.panoramaaudiovisual.com/2018/11/21/hbbtv-en-el-corazon-de-las-nuevas-plataformas-ott-de-los-broadcasters-europeos/.

[14] See https://www.diezminutos.es/teleprograma/programas-tv/a1991354/netflix-madrid-europa-espana/.

Netflix the third season of *La Casa de Papel* and *Sky Rojo*, an action drama starring women, among other projects. The integration of Netflix as part of Telefónica services represents another important milestone in the production and international distribution agreements of Spanish fiction.

Finally, it should also be noted that Atresmedia Studios has started its adventure by fulfilling its founding objective of consolidating a new line of business through the creation of exclusive fiction content for new national and international operators.

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

With 76 premiered titles in 2018 (26 national, 26 autonomic and 16 VoD), the production of Spanish fiction distances itself from the 53 titles in 2016 and 56 in 2017. One more year, La1 is the network with the highest number of titles (11), followed by Antena3 (eight). Tele5 hits a historical minimum (four), focused once again in reality shows. The number of reruns of national open networks decreases notably as a result of the increase in rebroadcasting in international channels, particularly in Atreseries Internacional.

Table 1. State fiction broadcasted in 2018

PREMIERE STATE TITLES – 26	**PREMIERE IMPORTED TITLES – 9**
La1 – 11 state titles	**Nova – 7 imported titles**
1. *Cuéntame Cómo Pasó* (series)	27. *En Tierras Salvajes* (*telenovela*)
2. *Traición* (series)	28. *Mi Marido Tiene Familia* (*telenovela*)
3. *Estoy Vivo* (series)	29. *El Vuelo de la Victoria* (*telenovela*)
4. *La Otra Mirada* (series)	30. *Sin tu Mirada* (*telenovela*)
5. *Fugitiva* (series)	31. *Por Ella Soy Eva* (*telenovela*)
6. *Servir y Proteger* (serial)	32. *Papá a Toda Madre* (*telenovela*)
7. *Sabuesos* (series)	33. *Hijas de la Luna* (*telenovela*)
8. *14 de Abril. La República* (series)	
9. *Acacias 38* (serial)	**Disney Channel – 2 imported titles**
10. *Centro Médico* (serial)	34. *Soy Luna* (*telenovela*)
11. *El Continental* (series)	35. *Chica Vampiro* (*telenovela*)
Antena3 – 8 state titles	**RERUNS**
12. *La Catedral del Mar* (series)	**La1**
13. *Cuerpo de Élite* (series)	36. *Estoy Vivo* (series)
14. *Fariña* (series)	37. *14 de Abril. La República* (series)

15. *Allí Abajo* (series) 16. *Presunto Culpable* (series) 17. *Amar es para Siempre* (serial) 18. *El Secreto del Puente Viejo* (serial) 19. *Apaches* (series) **Tele5 – 4 state titles** 20. *Vivir sin Permiso* (series) 21. *El Accidente* (series) 22. *La Verdad* (series) 23. *BByC* (unitary) **Disney Channel – 1 state title** 24. *Coco&Lana* (series) **Divinity – 1 state title** 25. *Yo Quisiera* (series) **Neox – 1 state title** 26. *Más de 100 Mentiras* (series)	**Divinity** 38. *Yo Soy Bea* (serial) 39. *Cita a Ciegas* (series) 40. *El Príncipe* (series) 41. *Perdóname* (series) 42. *La Pecera de Eva* (series) 43. *Hospital Central* (series) **Cuatro** 44. *Gym Toni XS* (serial) **TOTAL PREMIERE TITLES: 35** **TOTAL RERUNS: 9** **TOTAL AIRED TITLES: 44**

Source: Obitel Spain

The regional channels offer in 2018 the same number of premieres as the national ones (26), although only seven channels of this group aired premiere fiction, with TVG at the top (ten titles), followed by TV3 (seven) and IB3 (four). El Faro (Forta, 2013-2015) continues to show its profitability with its reruns in different channels of the Federation of Organizations or Autonomous Radio and Television Entities (Forta).

Table 1a. Autonomic fiction broadcasted in 2018

PREMIERE AUTONOMIC TITLES – 26 **TV3** 1. *Merlí* (series) 2. *El Nom* (TV movie) 3. *Benvinguts a la Família* (series) 4. *Vida Privada* (miniseries) 5. *Vilafranca* (TV movie) 6. *Si No T'Hagués Conegut* (series) 7. *Com si Fos Ahir* (serial)	**PREMIERE IMPORTED TITLES – 2** **Canal Sur** 27. *La Voz del Arrabal* (*telenovela*) **TVG** 28. *Morangos com Açúcar* (series)

TVG 8. *Os Mariachi* (miniseries) 9. *Serramoura* (series) 10. *Pazo de Familia* (series) 11. *Marisa Calidade* (miniseries) 12. *Viradeira* (series) 13. *O Soño Logrado* (TV movie) 14. *Os Fillos do Sol* (TV movie) 15. *O Sabor das Margaridas* (series) 16. *Era Visto* (series) 17. *Contou Rosalia* (miniseries) **IB3** 18. *En Vida Teva* (miniseries) 19. *Gàbia* (miniseries) 20. *Mai Neva a Ciutat* (series) 21. *Amor de Cans* (series) **À Punt** 22. *La Vall* (series) 23. *Aço És Un Destarifo* (sketch) **Canal Sur** 24. *Entre Olivos* (series) **ETB1** 25. Go!azen (series) **ETB2** 26. *La Víctima Número 8* (series)[15]	**RERUNS** **TV3** 29. *La Catedral del Mar* (series)[16] 30. *L'un per l'altre* **33** 31. *Com si Fos Ahir* (serial) **Canal Sur** 32. *El Faro* (series) **ETB2** 33. *Merlí* (series) **IB3** 34. *L'Anell* (series) 35. *Mitjorn* (series) 36. *Treufoc* (series) **TPA** 37. *El Faro* (serial) **TVG** 38. *O Faro* (serial) 39. *Matalobos* (series) 40. *Fontealba* (series) **Aragón TV** 41. *Homicidios* (series) 42. *Matalobos* (series) **CMT** 43. *El Faro* (series) **TOTAL PREMIERE TITLES: 28** **TOTAL RERUNS: 15** **TOTAL AIRED TITLES: 43**

Source: Obitel Spain

The 26 state premiere titles represent a total of 1,455 hours and 15 minutes, 76.8% of the total, to which we must add the 440 hours and 45 minutes corresponding to the nine Ibero-American

[15] *La Víctima Número 8* also premiered on Telemadrid, the series co-producer.
[16] Televisió de Catalunya (TVC), having participated in the productions of *La Catedral del Mar*, premiered the series in Catalan on August 27, after Antena3.

titles (23.2%). Mexico continues to be one of the main providers of Ibero-American fiction in Spain, with seven titles (20%), although the irruption of Turkish *telenovelas* in February promises a fierce competition.[17]

Table 2. State premiere fiction in 2018

Country	Titles	%	Chapters/ episodes	%	Hours	%
NATIONAL (total)	**26**	**74.3**	**1695**	**75.1**	**1455:15:00**	**76.8**
OBITEL COUNTRIES (total)	**9**	**25.7**	**561**	**24.9**	**440:45:00**	**23.2**
Argentina	1	2.9	50	2.2	13:30:00	0.7
Brazil	0	0.0	0	0.0	0:00:00	0.0
Chile	0	0.0	0	0.0	0:00:00	0.0
Colombia	1	2.9	111	4.9	11:15:00	0.6
Ecuador	0	0.0	0	0.0	0:00:00	0.0
Spain	**26**	**74.3**	**1695**	**75.1**	**1455:15:00**	**92.4**
USA (Hispanic production)	0	0.0	0	0.0	0:00:00	0.0
Mexico	7	20.0	400	17.7	84:00:00	4.4
Peru	0	0.0	0	0.0	0:00:00	0.0
Portugal	0	0.0	0	0.0	0:00:00	0.0
Uruguay	0	0.0	0	0.0	0:00:00	0.0
Venezuela	0	0.0	0	0.0	0:00:00	0.0
CO-PRODUCTIONS (total)	**0**	**0.0**	**0**	**0.0**	**0:00:00**	**0.0**
Spanish co-productions	**0**	**0.0**	**0**	**0.0**	**0:00:00**	**0.0**
Obitel co-productions	**0**	**0.0**	**0**	**0.0**	**0:00:00**	**0.0**
TOTAL	**35**	**100.0**	**2256**	**100.0**	**1896:00:00**	**100.0**

Source: Obitel Spain

The percentage of Spanish fiction increases slightly in the Spanish total (state and autonomic), with 1,741 hours and 40 minutes of aired time (79.5%), compared to 449 hours and 55 minutes (20.5%) of Ibero-American fiction. The 63 premiere titles in 2018 include a single Spanish-Mexican co-production, *O Sabor das Mar-*

[17] *Fatmagül* has become the most viewed fiction in the history of Nova (Atresmedia), with peaks of audience close to one million viewers. The Turkish *telenovelas* that Divinity airs top the ranking of the most watched spaces by smartTV of the Mediaset group and occupy the second place in the delayed reception through its web. See https://elpais.com/cultura/2019/02/21/television/1550771684_802004.htm.

garidas (TVG), although this year a Portuguese fiction (*Morangos com Açúcar*, TVG) has been premiered for the first time.

Table 2a. State and autonomic premiere fiction in 2018

Country	**Titles**	**%**	**Chapters/episodes**	**%**	**Hours**	**%**
NATIONAL (total)	**52**	**82.5**	**2116**	**78.2**	**1741:40:00**	**79.5**
OBITEL COUNTRIES (total)	**11**	**17.5**	**589**	**21.8**	**449:55:00**	**20.5**
Argentina	1	1.6	50	1.8	13:30:00	0.6
Brazil	0	0.0	0	0.0	0:00:00	0.0
Chile	0	0.0	0	0.0	0:00:00	0.0
Colombia	2	3.2	125	4.6	28:45:00	1.3
Ecuador	0	0.0	0	0.0	0:00:00	0.0
Spain	51	82.5	2110	7.2	1736:40:00	79.2
USA (Hispanic production)	0	0.0	0	0.0	0:00:00	0,0
Mexico	7	11.1	400	14.8	84:00:00	3.8
Peru	0	0.0	0	0.0	0:00:00	0.0
Portugal	1	1.6	14	0.5	11:40:00	0.5
Uruguay	0	0.0	0	0.0	0:00:00	0.0
Venezuela	0	0.0	0	0.0	0:00:00	0.0
CO-PRODUCTIONS (total)	**1**	1.6	**6**	0.2	**5:00:00**	0.2
Spanish co-productions	**1**	1.6	**6**	0.2	**5:00:00**	0.2
Obitel co-productions	**0**	0.0	**0**	0.0	**0:00:00**	0,0
TOTAL	**63**	**100.0**	**2705**	**100.0**	**2191:35:00**	**100.0**

Source: Obitel Spain

Since Obitel's inception, 2018 is the first year without miniseries or TV movies in the open national networks, so the series represents 76.9% of premieres (20 titles). The tendency to reduce the number of episodes of the series per season results in a notable decrease in the total aired time of the star format of Spanish television fiction, with 17.8% (259 hours and 45 minutes) compared to 64.8% (942 hours and 20 minutes) of the four serials.[18]

In parallel, the remarkable differences in the duration of the episodes, which range between 85 and 50 minutes, as well as in the number of episodes per season (between 13 and 16), prefigure im-

[18] The docudrama *Centro Médico* (La1) aired two daily chapters, resulting into a contribution to aired time for national fiction very close to that of the series (17.3% and 17.8% respectively).

minent changes in the formats. This perspective was confirmed by Antena3's announcement in July about cutting down all productions to 50 minutes in order to adapt them to the international standard[19], also adopted by the state serials.

The total distribution by formats (state and autonomous) is closer to that of previous years, with four miniseries and four TV movies. However, the modest contribution of noble genres in terms of programming time (0.6% and 0.3% respectively) does not substantially modify the percentage devoted to the series (23.5%), neither that of the five serials (60.4%).

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[19] See https://www.elperiodico.com/es/yotele/20180705/atresmedia-estreba-estrategia-pionera-solo-hara-series-de-50-minutos-6926635.

Table 3. Formats of state and Ibero-American fiction

Format	National						Ibero-American					
	Titles	%	C/E	%	H	%	Titles	%	C/E	%	H	%
Telenovela	4	15.4	1028	60.6	942:20:00	64.8	9	100.0	561	100.0	440:45:00	100.0
Series	20	76.9	234	13.8	259:45:00	17.8	0	0.0	0	0.0	0:00:00	0.0
Miniseries	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0	0:00:00	0.0
TV movie	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0	0:00:00	0.0
Unitary	1	3.8	1	0.1	1:10:00	0.1	0	0.0	0	0.0	0:00:00	0.0
Docudrama	1	3.8	432	2.5	252:00:00	17.3	0	0.0	0	0.0	0:00:00	0.0
Others	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	00	0:00:00	0.0
Total	**26**	**100.0**	**1695**	**100.0**	**1455:15:00**	**100.0**	**9**	**100.0**	**561**	**100.0**	**440:45:00**	**100.0**

Source: Obitel Spain

Table 3a. Formats of state, autonomic and Ibero-American fiction

Format	National						Ibero-American					
	Titles	%	C/E	%	H	%	Titles	%	C/E	%	H	%
Telenovela	5	9.6	1247	58,9	1051:50:00	60.4	11	100.0	589	100.0	449:55:00	100.0
Series	35	67.3	390	18,4	409:15:00	23.5	0	0.0	0	0.0	0:00:00	0.0
Miniseries	4	7.7	13	0,6	10:00:00	0.6	0	0.0	0	0.0	0:00:00	0.0
TV movie	4	7.7	4	0,2	5:50:00	0.3	0	0.0	0	0.0	0:00:00	0,0
Unitary	1	1.9	1	0,0	1:10:00	0.1	0	0.0	0	0.0	0:00:00	0,0
Docudrama	1	1.9	432	20,4	252:00:00	14.5	0	0.0	0	0.0	0:00:00	0,0
Others	2	3.8	29	1,4	11:35:00	0.7	0	0.0	0	0.0	0:00:00	0,0
Total	**52**	**100.0**	**2116**	**100.0**	**1741:40:00**	**100.0**	**11**	**100.0**	**589**	**100.0**	**449:55:00**	**100.0**

Source: Obitel Spain

The popular series *Cuéntame Cómo Pasó* (La1), which has the distinction of having figured among the ten most viewed fictions since its premiere in 2001, regains the first position in the state ranking, with 2,732,000 viewers (17.5% share), which represent the minimum record to date for the program that leads the annual classification. It is followed, a short distance away, by the series of Tele5 *Vivir sin Permiso* (2,700,000 viewers and 19.0% share), another triumph of Aitor Gabilondo, which repeats with the successful tandem of actors from *El Príncipe* (Tele5, 2014- 2016), José Coronado and Álex González. In fact, *Vivir sin Permiso* has been selected by the consulting firm The Wit as one of the most interesting series for the international market, at Mipcom 2018.[20]

The ten programs in the state ranking are series, five of which are thrillers. There are only two comedies, a genre with less and less premiered titles, as is being displaced by the thriller/ police and dramas set in the past. In fact, *Allí Abajo* (2,241,000 viewers and 14.4% share) has aired its fourth season this year, while the first and only season of *Cuerpo de Élite* (2,656,000 viewers and 16.4% share) is, in reality, the television transposition of Joaquín Mazón's homonymous comedy film (2016).

The two aforementioned comedies revolve around the deconstruction of regional stereotypes. The dramas face illnesses (*Vivir sin Permiso*), the drug trade (*Fariña*, *El Accidente*) or the terrorism of ETA (*Presunto Culpable*), in the context of the narratively profitable family relationships (*Traición*, *Presunto Culpable*, *Cuéntame Cómo Pasó*) and the growing inclusion of anti-heroes (*Vivir sin Permiso*, *Fariña*) and strong women (*Traición*, *Presunto Culpable*, *Fariña*, etc.).

[20] See https://www.elespanol.com/bluper/noticias/vivir-sin-permiso-serie-mas-vista-temporada-mejor-target-comercial.

The series of Tele5 *El Accidente* and *La Verdad* hold the leadership in their respective time slots, among viewers aged 25 to 34, with 19.7% and 17% respectively.[21]

Table 4. The ten most watched state titles

	Title	Country of origin	Channel	Format/ genre	Chap./ ep. (2018)	Time slot	Viewers	Rating	Share
1	*Cuéntame Cómo Pasó*	Spain	La1	Series/ dramedy	15	Prime time	2,731,533	6.1	17.5
2	*Vivir sin Permiso*	Spain	Tele5	Series/ thriller	13	Prime time	2,700,154	6.1	19
3	*La Catedral del Mar*	Spain	Antena3	Series/ drama	8	Prime time	2,665,625	6	17.3
4	*Cuerpo de Élite*	Spain	Antena3	Series/ comedy	13	Prime time	2,656,000	6	16.4
5	*Fariña*	Spain	Antena3	Series/ thriller	10	Prime time	2,567,600	5.8	16.2
6	*El Accidente*	Spain	Tele5	Series/ thriller	7	Prime time	2,546,286	5.7	15.6
7	*Allí Abajo*	Spain	Antena3	Series/ comedy	15	Prime time	2,240,867	5	14.4
8	*Traición*	Spain	La1	Series/ drama	4	Prime time	1,963,750	4.4	11.9
9	*Presunto Culpable*	Spain	Antena3	Series/ thriller	13	Prime time	1,898,846	4.3	13.2
10	*La Verdad*	Spain	Tele5	Series/ thriller	16	Prime time	1,879,267	4.1	12.8
Total productions: 10				**Foreign scripts: 0**					
100%				0%					

Source: Obitel Spain

The contribution of TV3 stands out in the autonomic ranking, with seven of the most viewed fictions in this group of channels. The last two episodes of *Merlí* (TV3, 2015-2018) lead the annual ranking, with an average of 581,000 viewers (19.8% share). The other six Catalan titles have debuted in 2018 with uneven results,

[21] Data from September 1, 2017 to June 14, 2018. See https://album.mediaset.es/file/10002/2018/06/19/MEDIASET_ESPANA_BALANCE_TEMPORADA_2018_ok_c4f5.pdf.

although, curiously, the second place has been occupied by a TV movie (*El Nom*), with 581,000 viewers (19.6% share).

Benvinguts a la Familia (777,000 viewers and 25.8% share) has been the best premiere of TV3 fiction in the last ten years, with a transversal plot articulated around the death of the father, which becomes the axis of the family and interpersonal conflicts addressed. The family, one of the preferred areas of Catalan fiction, also constitutes the structural axis of *El Nom*, *Si No T'Hagues Conegut*, etc.

Table 5. The ten most watched autonomic titles

	Title	Country of origin	Channel	Format/ genre	Chap./ ep. (2018)	Time slot	Viewers	Rating	Share
1	*Merlí*	Spain	TV3	Series/ dramedy	2	Prime time	581,000	8.2	19.8
2	*El Nom*	Spain	TV3	TV movie/ comedy	1	Prime time	506,000	7.1	19.6
3	*Benvinguts a la Família*	Spain	TV3	Series/ comedy	13	Prime time	483,000	6.8	16.5
4	*Vida Privada*	Spain	TV3	Mini-series/ drama	2	Prime time	368,000	5.2	14.2
5	*Vilafranca*	Spain	TV3	TV movie/ drama	1	Prime time	366,000	5.1	19.6
6	*Si No T'hagués Conegut*	Spain	TV3	Series/ drama	10	Prime time	293,000	4.1	11.3
7	*Com si Fos Ahir*	Spain	TV3	Serial/ drama	219	Afternoon	254,000	3.6	16.4
8	*Entre Olivos*	Spain	Canal Sur	Series/ drama	13	Prime time	181,000	2.2	5.2
9	*Os Mariachi*	Spain	TVG	Series/ comedy	3	Prime time	107,000	4.1	10.9
10	*Serramoura*	Spain	TVG	Series/ police	37	Prime time	106,000	4.1	11.2
Total productions: 10				**Foreign scripts: 0**					
100%				0%					

Source: Obitel Spain

3. Monitoring VoD in 2018

Netflix's landing in Spain forced traditional platforms to renew their strategies, while it also attracted other competitors, such as HBO Spain, Amazon Prime Video and Sky. This year, streaming subscription OTT's services have experienced an accelerated growth, with a penetration of one out of three homes with internet access subscribed to a payment platform.[22]

3.1. VoD in Spain

VoD platforms in Spain can be classified into three groups: TVoD (transactional video on demand), such as Rakuten TV; SVoD (subscription video on demand), like Netflix; and AVoD (advertising video on demand), such as Atresplayer.

Chart 2. VoD in Spain

	Platforms	Total
VoD linked to open TV networks*	LOVEStv, RTVE.es, Playz, Atresplayer, Mitele, Mtmad	6
VoD linked to pay TV	HBO España, Sky España	2
VoD linked to telecom companies	Movistar+, Vodafone TV Online, App Orange TV	3
VoD not linked to networks	Netflix, Filmin, Amazon Prime Video, Rakuten TV, Cineclick	5
TOTAL		16

*Only platforms linked to state networks are included.

Source: Obitel Spain

The CNMC Panel of Homes for the first semester of 2018 indicated YouTube (54.9%) as the preferred platform for internet viewing of on-demand television programs. Next, were VoDs linked to the generalist open channels, Atresplayer (35%), RTVE.es (30%)

[22] See https://blog.cnmc.es/2018/11/16/panel-de-hogares-cnmc-netflix-se-cuela-en-2-millones-de-hogares-en-espana/.

and Mitele (26.5%), followed by the first pay platform, Movistar+ (19.5%), and by Bein Connect/TotalChannel (3.4%).[23]

The digital platforms Playz (RTVE) and Flooxer (recently integrated into Atresplayer) have shown a praiseworthy interest in recovering the youngest audience, a segment of the very fragmented audience that prefers digital environments over linear television. Their original webseries have renewed the offer of youth content in Spain, while they have enhanced transmedia strategies and interaction through social networks. The success of its first interactive proposal, *Si Fueras Tú* (2017), prompted RTVE to launch nine digital fictions in 2018, whose best premiere was *Cupido*, with more than 300,000 viewings on the RTVE platform and on its official channels on YouTube and Facebook during the first ten days. Also worth mentioning is *Mambo*, renewed for a second season after getting more than 3 million views and being nominated for best series in the Zapping Awards. Flooxer premiered *Chernobyl: la Serie*, *Looser*, *Gente Hablando* and the success of the season, *Más de Cien Mentiras*. In the autonomous communities, TV3 is also trying to reach the "Z generation" with *Poliamor*, the first fiction production to be broadcasted on Instagram Live.

3.2. Earnings of VoD systems

The agreement between Telefónica and Netflix to integrate the catalog of the North American streaming company in Movistar+ represents one more step in the transformation of the television system in Spain. It has also complicated even more Movistar+ pricing structure, with several telephone and VoD packages.[24] Netflix, however, offers three plans in Spain: Basic (7.99 euros per month), Standard (10.99) and Premium (13.99).

Filmin, the pioneer VoD portal in our country, has two rates: Basic (7.99 euros per month) and Plus (14.99). Rakuten TV, HBO,

[23] See http://data.cnmc.es/datagraph/.

[24] Movistar+ also offers to rent single premiere movies (4.99 euros per film).

Cineclick and Sky only offer a subscription modality of monthly payment (6.99, 7.99, 9.95 and 10 euros respectively).[25] Amazon Prime Video is the only platform with an annual exclusive rate, which this year has gone from 19.95 to 36 euros, under the pretext that Spain was one of the countries with the lowest rate.

3.3. Analysis of VoD in 2018: national and Ibero-American premiere fiction

Movistar+ stands out due to a large number of productions (ten), but also because of the quality of some of them, such as: *Arde Madrid*, a comedy with touches of black humor set in the early 1960s in Madrid while Ava Gardner was living there; *El Día de Mañana*, an adaptation of the homonymous novel by Ignacio Martinez de Pisón about a collaborator of the pro-Franco police; or the comedy *Vergüenza*, which portrayed ridiculous situations lived by a couple in public places. *La Peste*, an intrigue and adventure drama set in the XVI century Seville, made up of six 50-minute episodes with a 10 million euros budget, is the most expensive Spanish fiction ever made. [26] It has also been the best premiere of the Telefónica platform, with 1.5 million viewers.[27]

Table 6. National and Ibero-American fiction in VoD in 2018

National premiere titles	Ibero-American premiere titles	Co-productions
Movistar+ – 10 national titles 1. *Arde Madrid* (series) 2. *Capítulo Cero* (series) 3. *El Día de Mañana* (series) 4. *Félix* (series)	**Netflix – 7 titles** 17. *La Casa de Las Flores* (series – Mexico) 18. *Narcos: México* (series – Mexico) 19. *Pacto de Sangre* (series – Chile)	**Movistar+ – 1 title** 24. *Vergüenza* (series – Brazil)

[25] Rakuten TV also offers a service to rent movies from 1.99 to 4.99 euros, depending on the title.

[26] See http://www.elmundo.es/television/2018/01/14/5a590624e2704eb6348b45e9.html.

[27] See https://www.fotogramas.es/series-tv-noticias/a23097097/audiencia-series-originales-movistar-conclusiones/.

5. *Gigantes* (series) 6. *La Peste* (series) 7. *Matar al Padre* (miniseries) 8. *Mira lo que Has Hecho* (series) 9. *Skam* 10. *Velvet Collection* (series) **Netflix – 3 national titles** 11. *Élite* (series) 12. *Las Chicas del Cable* (series) 13. *Paquita Salas* (series) **Amazon Prime – 1 national title** 14. *Pequeñas Coincidencias* (series) **Direct TV – 1 national title** 15. *Todo por El Juego* (series) **Fox España – 1 national title** 16. *Vis a Vis* (series)	20. *El Chapo* (series – USA) 21. *Ingobernable* (series – Mexico) 22. *Luis Miguel* (series – USA) 23. *La Ley Secreta* (*telenovela* – Colombia)	
Total: 16	**Total: 7**	**Total: 1**
TOTAL SUM: 24		

Source: Obitel Spain

The takeoff of Spanish fiction in VoD is obvious, as 24 titles premiered in 2018, including 16 Spanish, three Mexican, one Brazilian, one Columbian and one US production. There is a single co-production, the Movistar+ comedy *Vergüenza* (Spain-Brazil).

Table 7. Premiere fiction in VoD in 2018: countries of origin

Country	**Titles**	**%**
Argentina	0	0.0
Brazil	1	5.3
Chile	0	0.0
Colombia	1	4.2
Ecuador	0	0.0

Spain	**16**	**66.7**
USA (Hispanic production)	1	4.2
Mexico	3	12.5
Peru	0	0.0
Portugal	0	0.0
Uruguay	0	0.0
Venezuela	0	0.0
CO-PRODUCTIONS (total)	**2**	**8.3**
Spanish co-productions	1	4.2
Obitel co-productions	1	4.2
TOTAL	**24**	**100.0**

Source: Obitel Spain

Regarding formats, 88.2% of VoD releases are series, with a number of episodes that oscillate between five in the television parody *Capítulo 0* and 11 in the comedy *Vergüenza* and the youth drama *Skam*, all three from Movistar+. The only *telenovela* is the Colombian *La Ley Secreta*, whose 60 chapters represent almost half of the annual total.

Table 8. Formats of national and Ibero-American fiction in VoD

Format	**National**				**Ibero-American**			
	Titles	**%**	**C/E**	**%**	**Titles**	**%**	**C/E**	**%**
Telenovela	0	0.0	0	0.0	1	14.3	60	46.5
Series*	15	88.2	116	92.8	6	85.7	69	53.5
Miniseries	1	5.9	4	3.2	0	0.0	0	0.0
TV movie	0	0.0	0	0.0	0	0.0	0	0.0
Unitary	0	0.0	0	0.0	0	0.0	0	0.0
Docudrama	0	0.0	0	0.0	0	0.0	0	0.0
Others (soap opera, etc.)	1	5.9	5	4.0	0	0.0	0	0.0
Total	**17**	**100.0**	**125**	**100.0**	**7**	**100.0**	**129**	**100.0**

Source: Obitel Spain

4. Fiction analysis: open TV, VoD and transmedia expressions in social networks

Spanish networks continue to develop numerous transmedia proposals with the promise of an enriched experience and an increasingly interactive reception. On this occasion, Atresmedia and RTVE have expanded the narrative universe of all their fictions, mainly through additional content in their official pages, such as "La cripta", the web space of *La Catedral del Mar* (Antena3), which hosted exclusive content. The development of new programs derived from fiction is another prominent trend of both networks, with proposals like "Infiltrados en Cuerpo de Élite" (Atreseries), a space dedicated to reveal the secrets of the series *Cuerpo de Élite* (Antena3), or the testimonies program "Retratos con Alma", which analyzed the different topics dealt with in *La Otra Mirada* (La1). Atresmedia and RTVE have demonstrated their commitment to transmediality even in currently off-air productions, such as *El Ministerio del Tiempo* (TVE, 2015-2016; Netflix, 2017), which has launched its second comic, or *La Casa de Papel* (Antena3, 2017), inspiring the largest escape room in Europe.

Movistar+ has been, however, the platform that has revolutionized the transmedia scene in 2018. Among its most innovative proposals are: the 3D recreation of the house of Ava Gardner in the microsite of *Arde Madrid*; "Felix VR", the virtual reality experience of the series *Félix*; and the immersive police intranet of *Gigantes*, which allows users to follow the trail of the activities of the family of protagonists. However, the most extensive fictional universe of Movistar+ corresponds to *La Peste*. Through multiple formats (podcast, webseries, multimedia and interactive documentary, webdoc, cooking show, geolocated route, making of, etc.), the web space of the series offers more than 350 minutes of extra content to delve into the historical context of the 16th century Seville.

The convergence between fiction and web 2.0 is also evident in social networks, particularly in the case of *Élite*. This is the second premiere of Netflix Spain, after *Las Chicas del Cable* (Netflix, 2017-2018), one of the fictions of the North American platform that received the most feedback from its viewers and the most watched in marathon mode in the first three weeks of October[28], that is, the three following the premiere. This juvenile series is expanded by five official interactive platforms: the microsite that hosts the website of the network (not interactive), an official page on Facebook, a Twitter account, another one on Instagram and a YouTube channel that hosts the material complementary to the series.

4.1. Internet users' discourse about *Cuerpo de Élite*

During the observation period[29], the administrator published 67 comments, which provoked a massive response among internet users, with 18,144 responses, 60,083 "likes", in addition to having been shared 56,847 times. This confirms likes are the most frequent response and there is a tendency to share content instead of writing comments (Rubio and Vidales, 2015; Viñes and Rodríguez, 2014). Given Netflix's distribution strategy, the updates are not determined by the day a new episode is released, as is the case with traditional broadcasting (Rubio and Vidales, 2015), but they coincide with other key moments such as the announcement of the premiere, the premiere in itself or the news of the renewal of the series.

The period selected for the analysis was the one with the greatest activity: October 5 to October 17, that is, from the premiere of the series to the announcement of its renewal. This period hosts more than half of the spontaneous messages published throughout the year (58.8% and 383 comments).

Most users say that they love the original idea of the series (97.1% and 372 comments), while 45.2% (168 comments) say they recommend it because it "hooks you" and 38% (142 comments) maintain that it is impossible to "stop watching". Another of the

[28] See https://www.tvtime.com/article/binge-report-week-of-oct-1-elite-big-mouth; https://www.tvtime.com/article/binge-report-week-of-october-8-elite-horror; https://www.tvtime.com/article/binge-report-week-of-oct-15-elite-daredevil.

[29] The collection of the quantitative sample on the official Facebook page was conducted between July 3 and December 31, 2018, that is, from the day the first comment was published until the end of the year.

great successes of *Élite* is, according to the viewers, the introduction of various social issues that concern adolescents and young people around the world (35.2% and 131 comments), such as sexuality, free love, drugs, religion, xenophobia, Aids, etc. Among those who praise it, 57.8% (215 comments) also point out the need for a second season, while the only criticism observed is that it only has eight episodes (25% and 93 comments). Finally, it confirms the compulsive and frenetic consumption that drives new platforms, as 31.3% (120 comments) claim to have binge watched the fiction in a single day.

As in previous research, it is noted that spontaneous publications bring up many issues, most of which do not become part of a conversation, so the interaction between users is quite limited (Lin, Sung and Chen, 2015; Lacalle and Castro, 2018). The contribution of the official Facebook page to the construction of transmedia relations is also limited, since no exclusive or expanded content is identified, but simply adapted from the official website (Askwith, 2007).

5. Highlights of the year

The notable increase in the number of Spanish fiction titles in 2018 due to VoD platforms adding to the offering of open channels as well as the changes introduced in the genres and formats have led to changes in the traditional patterns of production, which reveal the transition to a new stage. The predominance of productions that have a single season, in line with the constant demand for new products from the international market, is one of the outstanding trends of the 26 premiere state channels fictions, a fact that contrasts sharply with the 18 seasons of the series that leads the ranking, the dramedy of La1 set in the past *Cuéntame Cómo Pasó* (2,732,000 viewers and 10.5% share). The series, set this year in the second half of the 1980s, continues to connect with its audience, despite the changes experienced over time as a result of the departure of some of the main actors.

Another effect of the growing internationalization of Spanish fiction is the increase in stories set in the past, with 15 titles in the open channels (13 in 2017) and six in the VoD platforms (three in 2017), which prove to be one of the areas likely to stimulate agreements and, even, co-productions between companies operating in different areas of content distribution. Thus, *La Catedral del Mar* (2,665,625 and 17.2%), from Antena3, is the adaptation of the successful novel by Ildefonso Falcones on the construction of the church of Santa Maria del Mar in Barcelona in the 14th century, which counted with the participation of TV3 in exchange for the diffusion in Catalan in its territory and received the support of Netflix in exchange for the exhibition on the platform, in both cases after the broadcast on Antena3.

The thriller underpins, one more year, the genres of state fiction, with five of the ten most watched programs in 2018. The top ten includes another literary adaptation, inspired in this case in real events. *Fariña* (Antena3) is based on the homonymous novel by Nacho Carretero, on the reconversion of tobacco smuggling into drug trafficking in Galicia in the late 1970s. *Fariña* (2,568,600 viewers and 16.2% share), highly acclaimed both in and out of Spain, has led to an overturning of the police/thriller in favor of action with intrigue set in criminal environments, a trend also followed by *Apaches* (1,310,000 viewers and 8.5% share), from Antena3, and *Vivir sin Permiso* (2,700,000 viewers and 19% share), from Tele5. Recognizable locations and greater prominence of outdoor filming in a large part of the intrigue series consolidate another trend initiated by *El Príncipe* in previous years. *Presunto Culpable* (1,911,467 viewers 13.3 % share), from Antena3, and *La Verdad* (1,851,500 and 12.8% share), from Tele5, are set, respectively, in Vizcaya and Santander.

Comedy has a greater presence in VoD fictions (six titles) than in the productions of open state networks (three titles). The Spaniards' taste for humor on regional topics is reaffirmed with the premiere of *Cuerpo de Élite* (2,656,000 and 16.4% share) and the fourth season of the hit show *Allí Abajo* (2,241,000 and 14.4% of share), both on Antena3. On the other hand, the mixture of detective and fantasy in *Sabuesos* (1,074,000 and 8.6 of share), a comedy about a thinking dog and its owner, has not suffered the same fate in La1.[30]

The Spanish fiction of generalist networks continues its unstoppable progress in its internationalization. The long lists of sales and adaptations back up their success abroad and show that competition with VoD is only the other side of complementarity, something that has not prevented some pessimists from warning of a possible bubble.[31]

The most notable adaptations of the year include the successful *Sé Quién Eres* (Tele5), by CBS TV Studios for the Paramount Network channel, and *Estoy Vivo* (La1), whose script is being prepared by David Wilcox for CBS with the title *Far Rockaway*. Broadcasting agreements, both with generalist channels and VoD platforms, continue their upward trajectory in countries where Spanish fiction is regularly broadcast, such as Italy (*La Verdad*, in Canale5, *Fariña*, in Amazon Prime Video) and Latin America (*El Accidente*, on On-DirectTV). At the same time, the productions of open channels are entering markets that have not previously been visited by Spanish fiction, such as the Middle East (Acacias 38, in CBC Egypt, Dubai TV and OSN) or Japan (*Vis a Vis*, Hulu). *Vis a Vis* has also become the first Spanish series broadcast in the United Kingdom (Channel4).

6. Theme of the year: television distribution models by the internet: actors, technologies, strategies

The take-off of digital platforms in Spain has received a great boost in 2018 with the convergence between telecommunications companies and OTT services. The demand for television fiction and the desire to build loyalty among users have led most of the telecommunications operators to offer "fivefold" packages, with a single monthly payment at a fixed price, which includes pay TV,

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[30] Tele5 canceled the project of *BByC*, a dramatic comedy focused on the celebration of family events, and aired the pilot on September 11, 2018.

[31] See https://www.lavanguardia.com/vida/20181030/452656043216/la-ficcion-televisiva-entre-la-burbuja-y-el-postureo.html.

mobile phone, fixed broadband and mobile broadband. The demand for packaged services including pay TV has registered a new record this year, with 6.2 million new clients, of which 5.9 million are quintuple packages.[32]

6.1. Telecommunications and OTT: from competitors to collaborators

Netflix arrived in Spain on October 20, 2015 among numerous rumors about the alleged boycott by Telefónica to the subscribers of the North American platform, who complained about poor connectivity and image quality.[33] Netflix's reaction was immediate and, two months later, leaked a ranking of Spanish operators based on the quality of their connections, placing Telefónica last, behind Telecable, Euskaltel, Ono-Vodafone, Jazztel and Orange.[34] Telefónica responded that, if Netflix paid Comcast and Verizon operators in the US for its service, it should do the same in Spain, in order to establish a peering agreement (direct data traffic) in its bandwidth.[35]

The union of telephone providers and platforms began in 2017, when Movistar had lost 41,000 broadband clients, compared to the 33,000 won by Orange, 100,000 by Vodafone and 122,000 by Masmovil, which also included in their decoders the applications of the platforms.[36] The Telefónica counteroffensive resulted, in May 2018, into an agreement with Netflix that would allow Movistar+ subscribers to receive the contents of the North American platform as of December.[37] In fact, 2018 has shown that the dissemination of

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32 See http://data.cnmc.es/datagraph/jsp/inf_trim.jsp.

33 See https://blogs.elconfidencial.com/tecnologia/homepage/2015-12-14/la-guerra-entre-movistar-y-netflix-o-como-pisotear-la-neutralidad-de-la-red_1119774/

34 See https://www.eleconomista.es/tecnologia/noticias/7212510/12/15/Netflix-da-un-toque-a-Movistar-Su-conexion-esta-entre-las-peores-de-Europa.html

35 See https://blogs.elconfidencial.com/tecnologia/homepage/2015-12-14/la-guerra-entre-movistar-y-netflix-o-como-pisotear-la-neutralidad-de-la-red_1119774/

36 See https://www.xataka.com/eventos/netflix-ya-no-es-el-enemigo-telefonica-y-hastings-se-dan-la-mano-en-un-giro-estrategico-e-inesperado

37 See https://elpais.com/economia/2018/12/10/actualidad/1544430729_239071.html

television content benefits the telephone companies[38]:

a) Movistar+: 3,943,206 households (2017: 3,604,000). It offers Netflix.
b) Vodafone: 1,352,358 households (2017: 1,309,000). It offers Netflix, Filmin, HBO and Amazon Prime.
c) Orange: 614,163 households (2017: 520,000). It offers Netflix, FlixOlé and Rakuten TV.
d) Euskaltel: 411,629 homes (2017: 276,000). It offers Netflix.

North American platforms operate in Spain in a similar way as they do in other countries, with a wide range of foreign content and a growing tendency to produce their own content in each country, adapting it to its culture and professionals. The eagerness to increase owned copyright in the offer of VoD platforms has resulted into different business movements, revealing the dynamism of the local audiovisual sector. Netflix's first production European center in Madrid is probably the most relevant, but it is far from being the only one.

This year Amazon Prime Video, which had already signed an agreement in 2017 with Atresmedia, TVE and Mediaset to buy its series and add Spanish production to its catalog[39], has premiered its first Spanish series, *Pequeñas Coincidencias*, produced with Atresmedia. HBO has also announced its debut in Spanish fiction with *Patria*[40], by Alea Media, a company very close to Mediaset, the group that initially was to take over the production. Sky has been the last platform to reach Spain, aiming to generate its own content to reach the "12 million households that still do not have pay TV"[41],

[38] See https://www.barloventocomunicacion.es/wp-content/uploads/2018/12/analisis-televisivo-2018-BarloventoComunicacion_a25dic18.pdf
[39] See https://www.elconfidencial.com/television/series-tv/2017-12-21/amazon-prime-video-compra-series-tve-atresmedia-mediaset-espana_1496706/
[40] Adaptation of the homonymous bestseller by Fernando Aramburu about ETA's impact on Basque society. See https://www.esquire.com/es/actualidad/tv/a24057837/patria-serie-hbo-novela-fernando-aramburu-estreno/.
[41] See http://www.expansion.com/economia-digital/companias/2018/07/01/5b3208e4468aebd1738b4628.html.

and has an exclusivity agreement with Yoigo (Másmovil's brand), so that its customers can access the service.

Spanish platforms are dominated by Movistar+, a company belonging to Telefónica Group that broadcasts via satellite and IPTV since 2015, resulting from the merger of Canal+ and Movistar TV. A pioneer in pay TV in Spain, Canal+ had been offering premiere films from Hollywood Major Movie Studios and soccer since the 1990s. Its exclusive content strategy added television fiction in 2015 through an agreement with HBO, so Movistar+ was the only way to access some popular series such as *Game of Thrones* or *Girls* in Spain.[42] In fact, the arrival of HBO to Spain was a key turning point for the expansion strategies of Movistar+, with the announcement in 2017 of an investment of 100 million euros a year to produce 14 series of its own, in addition to its explicit wish to invest in 4K technology.

Movistar+ also represents a paradigmatic example of vertical integration, whose hegemony is supported by being a platform owned by a telecommunications group that held the national telephone service in Spain from 1924 until its privatization in 1990. Market liberalization and the competitive strength of other operators (the result of mergers such as Vodafone with Ono, Orange with Jazztel or MásMóvil with Yoigo and Pepephone) have started a fierce commercial battle for prices and package deals[43], at the center of which are the platforms and content of television fiction, as well as its exclusive property.[44] However, beyond the large Spanish media groups and telecommunications companies, the Spanish platforms Wuaki-Rakuten TV and Filmin have been pioneers in developing the streaming service since 2010.

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[42] See https://comunidad.movistar.es/t5/Canales-y-Programaci%C3%B3n-TV/Movistar-Series-se-hace-con-el-catalogo-de-HBO-incluido-Juegos/td-p/2363430.

[43] See https://www.xatakamovil.com/promociones/guerra-precedentes-movistar-vodafone-50-descuento-durante-dos-anos-fibra-movil-tv.

[44] See https://www.xataka.com/streaming/movistar-contra-netflix-y-hbo-la-guerra-por-las-series-que-no-produce-ninguno-de-los-tres.

Wuaki.TV started in Barcelona as a start-up project for a content distribution platform of films by Hollywood's Major Movie Studios. In 2012, the Japanese group Rakuten, leader in e-commerce and main sponsor of FC Barcelona, bought the company and since 2017 it is marketed as Rakuten TV. It offers a monthly subscription service, but pay-per-view is also available via a simple registration. Its commitment to technological quality, through its agreements with Dolby Vision and Dolby Atmos technologies, as well as its integration with LG TV, show their willingness to take full advantage of the 4K UHD quality.

Filmin is a distribution platform that is also based in Barcelona, very focused on independent films and European series. With a catalog attentive to cultural, national, generational, sexual and linguistic diversity, its main strength is the curation of content, organized by collections ("Nostalgia of the 90s", "Top LGTBI"), authors, themes and genres. With Filmin.cat, users can access Catalan or Catalan content (dubbed or subtitled) and series of the different Spanish regional channels.

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9
United States: network infrastructure of the internet television industry[1]

Author:
Juan Piñón[2]

1. Hispanic USA's audiovisual context in 2018

The new digital landscape and its challenges to Spanish-language TV in the United States had one of their most visible effects in 2018, in the corporate reorganization of all the US Hispanic television media companies. Changes were triggered by the need to satisfy the demand for new products for both open television and digital platforms, based on new audiences' consumption routines. But also this corporate reorganization was prompted by the fierce competition for audiences between the two leading networks: Univision and Telemundo.

In 2018, Univision abandoned its plans to enter the New York Stock Exchange, caused by a dragging debt it had since 2007, brought about by the corporations' acquisition process, and negatively impacted by the systematic decline in ratings. This resulted in the resignation of Randy Falco and the appointment of Vincent Sadusky as Univision's new CEO. Sadusky will make a U-turn, by reorienting the corporate goals of Univision Communications to its original mission, which focuses on the Spanish-language media business.

[1] On behalf of Obitel, we would like to express our deep gratitude to Brad Poretskin, national senior vice-president at TAM Nielsen, and Ralph Spencer, of the Local Media Clients team at Nielsen Media Research, for their collaboration in the realization of this study and for his invaluable contribution to the field of research in Hispanic television.
[2] Juan Piñón is an associate professor in the Department of Media, Culture and Communication at New York University (NYU).

This was reflected in the corporation's intentions to sell the portfolio of digital properties in English (Gizmodo Media Group, The Onion and Fusion Digital), but also in the dismissal of Isaac Lee, who was in charge of Fusion, the network's project in English. Instead, Univision appointed Patricio Wills as the company's content director. Wills, who produced *La Reina del Sur* for Telemundo, created, with Univision, a company called W Studios, with the purpose of producing action-oriented fiction for Univision/Televisa in the same modality that superseries had worked for Telemundo.

Telemundo opened a new corporate center that houses the recently launched Telemundo Global Studios, under the direction of Marcos Santana. This year also, Luis Silberwasser, CEO of Telemundo, announced his retirement, triggering a series of movements in executives' positions, and at the same time underscored the leadership of Cesar Conde as chairman of NBC-U International Group and NBC-U Telemundo Enterprises.

In November, LBI Media Inc., the corporation that owns EstrellaTV, filed for bankruptcy due to a dragging debt and the increasing competition from digital media platforms. This bankruptcy occurred in the midst of a legal battle between LBI Media Inc. and the Caspian Capital LP, one of its lenders. For its part, Azteca America also underwent a restructuring process after it was acquired, in December 2017, by HC2 Network Inc.

1.1. Hispanic open television in the United States

In 2018, the number of television networks remain stable, with five national channels in Spanish, same as in 2017. Two networks, Univision and Telemundo, lead in ratings and share, in a quasi-duopoly dynamic in this industry. UniMas is a medium-weight network, while EstrellaTV and Azteca America are smaller networks.

Chart 1. Hispanic open television networks in the U.S.

Private networks	Public networks
Azteca America EstrellaTV Telemundo UniMás Univision	
TOTAL PRIVATE NETWORKS: 5	**TOTAL PUBLIC NETWORKS: 0**

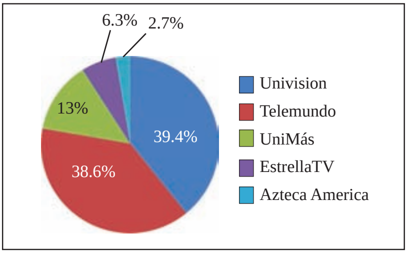
Source: Obitel USA

In 2018, the battle for the ratings between Univision and Telemundo intensified. In that year, the two television networks found themselves in a technical tie, with Univision a little higher, with a 453 thousand average of audiences' households against Telemundo's average of 444 thousand households. Univision went down in audiences' share in relation to 2017, while Telemundo audiences' share increase equaled the numbers of its competitor. UniMás, the other broadcasting television network from Univision, also dropped some share points in relation to 2017. Meanwhile, EstrellaTV rose one share point, while Azteca America remained the same.

Graphic 1. Rating and share by TV network

Share TV networks	HH (%)
Univision	39.4
Telemundo	38.6
UniMás	13.0
EstrellaTV	6.3
Azteca America	2.7

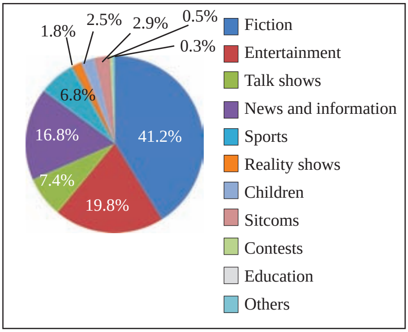
Source: Obitel USA – Nielsen



In relation to television genres in 2018, fiction, entertainment, news and information and sports were, in that order, the genres with the most screen time in the programming grills of US Hispanic television. The percentages of these genres have been consistent in the last five years, reflecting a clear programming strategy, with what the format and genre refer to networks programming.

Graphic 2. TV programming by genre

Genre broadcast	Hours	%
Fiction	13700:10	41.2
Entertainment	6562:13	19.8
Talk shows	2465:54	7.4
News and information	5576:06	16.8
Sports	2272:44	6.8
Reality shows	588:10	1.8
Children	835:55	2.5
Sitcoms	965:20	2.9
Contests	167:00	0.5
Education	0:00	0.0
Others	100:47	0.3
TOTAL	**33234:20**	**100.0**



Source: Obitel USA – Nielsen

1.2. Pay TV

The portfolio of US cable television networks aimed at Hispanics is led in ratings by two networks owned by Univision: Galavisión and Univisión Deportes. Following these two networks, by rating numbers, are: Discovery en Español, Universo, ESPN Deportes, Fox Deportes, Bein Sport Español, Nat Geo, CNN en Español, Discovery Familia and Fox Life. But the cable offer for Hispanics is much more extensive. There are at least 75 cable channels aimed at Latinos in the US, integrated by the offer of Hispanic corporations such as Galavisión, by Univision, or Universo, by Telemundo, the portfolio of global corporations such as CNN en Español or Fox Deportes, and a vast offering from Ibero-American channels.

1.3. Advertising investments of the year: in television and in fiction

Univision reported that, in 2018, the company had a revenue of US$ 2,713.8 million from advertising, subscription and retransmission fees, which meant a decrease of 7.6% of the US$ 2,937.3 million that it earned in 2017. Univision advertising revenue was US$ 1,258.2 million in 2018, which was a 10.7% reduction in relation to the US$ 1,409.4 million in 2017. By sector, television advertising revenue was US$ 1,190.9 million in 2018, 11.3 % below the US$ 1,343.3 million from 2107. The digital sector had revenues of US$ 67.3 million in 2018, 1.8% above the US$ 66.1 million in 2017 (UCI, 2019).

Comcast, the owner of NBC-Universal, Telemundo's parent company, does not report the revenues from the Hispanic network separately. Comcast reports, in its area of broadcasting television, the revenue of NBC and Telemundo, its two national networks, together. In 2018, the report revealed that, excluding the earnings from the Olympics, the open television category had a revenue of US$ 11,439 million, which meant an increase of 19.6% in relation to the US$ 9,563 million in 2017. This income is related to the increase in advertising, distribution, and payment of retransmission fees. In general, the NBC-Universal division, integrated by its cable networks, open television, film and theme park businesses, had an income of US$ 35.8 billion, which meant an increase of 8.9% in relation to 2017 (Comcast, 2019).

1.4. Merchandising and social merchandising

Spanish-language television networks continued their commitment to social and community-oriented work in support and defense of the US Hispanic population. This is reflected through different Univision's campaigns, such as: Univision Contigo, named after its support of health, education and diversity; Small and Valuable, in support of children; Teleton; Univision Farmacia; We are the Mighty, in support of families of veteran Hispanic military; and Habla USA, a campaign to celebrate the use of Spanish language and Latino culture in the United States. Univision also filed a lawsuit against the proposal of including a question about citizenship for voting rights in 2020. Telemundo, meanwhile, launched a campaign within the context of the 2018 elections, called The Vote is Our Future. The network broadcast educational campaigns and support for minorities in the field of science and technology careers, as well as support for entrepreneurs and job search for veterans and people with different skills. For its part, EstrellaTV carried out Radiotón, to help Texan children in the hospital, and Saving Lives, with a support walk to the organization Surgery without Borders, which helps people without health insurance to have access to health services, among others.

1.5. Communication policies

Trump's administration, through the Federal Communications Commission (FCC), has been characterized by its approval of deregulatory measures. Among them, the elimination of the law that required radio and television stations to have physical production studios in the localities where they had their transmission stations. They also eliminated a provision that banned a television station from owning a newspaper in the same city. By the end of 2018, the FCC opened a general review of media ownership rules, with the prospect of allowing the merging of large national broadcasters ABC, CBS, NBC and Fox. This possible change in a key antitrust law of the industry is being proposed under the supposed difference of forces that represent the new participants in the media ecology, such as Netflix, Amazon, Google and Apple, and their offering of over-the-top (OTT) services on the internet.

1.6. Digital and mobile connectivity infrastructure

According to the website Internet World Stats, there is a 95% penetration of the internet in the United States; 84% are made up of a fixed connection at home, of which 82% are broadband. It is important to note that, since the end of 2017, broadband internet subscribers outperformed subscribers of pay television services in the US market. However, only 47% of Hispanics have a broadband connection, and one-third of Spanish-speaking Latinos do not have a computer; the telephone becomes a key tool for connecting to the network. So, in terms of ownership of mobile telephone devices, in general, Latinos are 97%, as opposed to the 95% of the general population. However, in the specific category of smartphone ownership, 77% of Latinos have these devices, at the same level as the general population.

1.7. Independent producers

Independent production companies are more important than ever, due to their vital collaboration in the television networks' projects for open television programming, as well as their products that go directly to digital platforms. Among the more active independent production houses working for the US Hispanic television market in fiction in 2018 are: Argos, Lemon Studios, W Studios, Fox Telecolombia, Fox Telemexico, Freemantle Media, Imagina, Gato Grande Productions and Teleset Mexico.

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

The Hispanic television industry in 2018 showed fewer titles of premiere fiction, both national and Ibero-American, with emphasis on some trends that have already been present. The main trend will be the move of Univision and Televisa towards action-oriented fiction thriller. This was a response to the success of Telemundo's superseries in recent years, which have displaced the traditional *telenovelas*' classic romantic melodrama in prime time. After the demise of MundoMax/MundoFox) two years ago, Univision will keep the strategy of including religious historical-fictional narratives in its programming grid. Another trend that has been consolidated is the collaboration of the television networks with the main streaming services, such as Netflix and Amazon, to produce content for both their platforms and the television grid. Not only the action thriller won spaces, but the romantic-comedy *telenovela* also got more titles.

Table 1. Fictions broadcast in 2018 (national and imported; premiere and reprises; and co-productions)

PREMIERE NATIONAL TITLES –20 **Telemundo – 12** 1. *Del Otro Lado del Muro* (*telenovela*) 2. *El César* (*telenovela*) 3. *Enemigo Íntimo* (*telenovela*) 4. *Falsa Identidad* (*telenovela*) 5. *José José: el Príncipe de la Canción* (*telenovela*) 6. *Mi Familia Perfecta* (*telenovela*) 7. *El Recluso* (series) 8. *Sangre de mi Tierra* (*telenovela*) 9. *El Señor de los Cielos VI* (*telenovela*) 10. *Señora Acero IV* (*telenovela*) 11. *Señora Acero V* (*telenovela*) 12. *Falco* (series) **Univision – 2** 13. *El Chapo 3* (series) 14. *Descontrol* (unitary) **UniMás – 1** 15. *Soy Luna* (*telenovela*) **HISPANIC CO-PRODUCTIONS – 5** **Telemundo – 2** 16. *Luis Miguel* (series – U.S., Mexico) 17. *Sin Senos Sí Hay Paraíso* (*telenovela* – U.S., Colombia) **Univision – 3** 18. *La Piloto 2* (*telenovela* – U.S., Mexico) 19. *La Bella y las Bestias* (*telenovela* – Mexico, U.S.) 20. *Amar a Muerte* (*telenovela* – Mexico, U.S.) **PREMIERE FOREIGN TITLES – 32** **Azteca America – 9** 21. *Demencia* (series – Mexico) 22. *Entre Correr y Vivir* (series – Mexico) 23. *Hombre Tenías que Ser* (*telenovela* – Mexico) 24. *Malcriadas* (*telenovela* – Mexico) 25. *Más Allá del Miedo* (series – Mexico) 26. *Mujeres Rompiendo el Silencio* (unitary – Mexico) 27. *Pobre Diabla* (*telenovela* – Mexico) 28. *Prófugas del Destino* (*telenovela* – Mexico) 29. *Vis a Vis* (series – Spain)	44. *Rosa de Guadalupe* (unitary – Mexico) 45. *Vuelo de la Victoria* (*telenovela* – Mexico) 46. *Como Dice el Dicho* (unitary – Mexico) **UniMás – 6** 47. *Érase Una Vez* (series – Mexico) 48. *La Hermandad* (series – Mexico) 49. *Jefa del Campeón* (*telenovela* – Mexico) 50. *La Niña* (*telenovela* – Colombia) 51. *Sincronía* (webseries – Mexico) 52. *La Tierra Prometida* (*telenovela* – Brazil) **REPRISES – 50** **Azteca America – 10** 1. *Bajo el Alma* (*telenovela* – Mexico) 2. *Cada Quien su Santo* (unitary – Mexico) 3. *Lo que Callamos las Mujeres* (unitary – Mexico) 4. *Contrato de Amor* (*telenovela* – Mexico) 5. *Están Entre Nosotros* (series – Mexico) 6. *Lo que la Gente Cuenta* (series – Mexico) 7. *Las Juanas* (*telenovela* – Mexico) 8. *Olvidé que te Quería* (*telenovela* – Mexico) 9. *Siempre Tuya Acapulco* (*telenovela* – Mexico) 10. *UEPA Escenario Amar* (*telenovela* – Mexico) **EstrellaTV – 4** 11. *Pablo Escobar* (*telenovela* – Colombia) 12. *Historias Delirantes* (series – Mexico) 13. *Milagros* (unitary – Mexico) 14. *Secretos* (series – Mexico) **Telemundo – 10** 15. *Decisiones* (unitary – U.S.) 16. *Hasta que te Conocí* (series – U.S., Mexico) 17. *Historia de la Virgen Morena* (unitary – U.S., Mexico) 18. *Marido en Alquiler* (*telenovela* – U.S., Brazil) 19. *Milagros de Navidad* (unitary – U.S.)

EstrellaTV – 3
30. *Maldita Tentación* (series – Mexico, Colombia)
31. *Promesa* (*telenovela* – Colombia)
32. *Tarde lo Conocí* (*telenovela* – Colombia)

Univision – 14
33. *Caer en Tentación* (*telenovela* – Mexico)
34. *Corazón que Miente* (*telenovela* – Mexico)
35. *En Tierras Salvajes* (*telenovela* – Mexico)
36. *Enamorándome de Ramón* (*telenovela* – Mexico)
37. *Jesús* (*telenovela* – Brazil)
38. *Like, la Leyenda* (*telenovela* – Mexico)
39. *Mi Marido tiene Familia* (*telenovela* – Mexico)
40. *Mi Marido tiene Más Familia* (*telenovela* – Mexico)
41. *Papá a Toda Madre* (*telenovela* – Mexico)
42. *Por Amar sin Ley* (*telenovela* – Mexico)
43. *El Rico y Lázaro* (*telenovela* –Brazil)

20. *La Patrona* (*telenovela* – U.S.)
21. *Perro Amor* (*telenovela* – U.S.)
22. *Santa Diabla* (*telenovela* – U.S.)
23. *Silvana sin Lana* (*telenovela* – U.S.)
24. *Tierra de Reyes* (*telenovela* – U.S.)

Univision – 9
25. *Cachito de Cielo* (*telenovela* – Mexico)
26. *Fuerza del Destino* (*telenovela* – Mexico)
27. *Los Milagros de Jesús* (miniseries – Brazil)
28. *Qué Bonito Amor* (*telenovela* – Mexico)
29. *Lo que la Vida me Robó* (*telenovela* – Mexico)
30. *Quiero Amarte* (*telenovela* – Mexico)
31. *Rey David* (miniseries – Brazil)
32. *Simplemente María* (*telenovela* – Mexico)
33. *La Tempestad* (*telenovela* – Mexico)

UniMás – 17
34. *Abismo de Pasión* (*telenovela* – Mexico)
35. *La CQ* (*telenovela* – Mexico)
36. *El Chapo 2* (series – U.S.)
37. *La Embajada* (series – Spain)
38. *La Fuerza de Creer* (webseries – U.S.)
39. *Hasta el Fin del Mundo* (*telenovela* – Mexico)
40. *Lo Imperdonable* (*telenovela* – Mexico)
41. *José de Egipto* (*telenovela* – Brazil)
42. *Lady, la Vendedora de Rosas* (*telenovela* – Colombia)
43. *La Malquerida* (*telenovela* – Mexico)
44. *Mujer, Casos de la Vida Real* (unitary – Mexico)
45. *Por ella Soy Eva* (*telenovela* – Mexico)
46. *Porque el Amor Manda* (*telenovela* – Mexico)
47. *El Príncipe* (series – Spain)
48. *Rosario Tijeras* (*telenovela* – Mexico)
49. *Sansón y Dalila* (*telenovela* – Brazil)
50. *Velvet* (serie – Spain)

TOTAL PREMIERE TITLES: 52
TOTAL REPRISES: 50
TOTAL GENERAL TITLES: 102

Source: Obitel USA – Nielsen

In 2018, the sum of national and Ibero-American premieres gave us a total of 52 titles, continuing with a general downward trend in new releases in the last three years. After reaching a historical point of total fiction premieres in 2015, with 68 titles, during the following years there has been a continuous decline of new fictional titles. So, in 2015, 68 titles were released, down to 64 in 2016, 61 titles in 2017, and 52 titles in 2018. In terms of national premieres, there were 20 new titles in 2018, with a decrease in relation to the 24 titles of 2017. Ibero-American titles also fell from 37 in 2017 to 32 in 2018.

Table 2. Premiere fiction in 2018: countries of origin

Country	Titles	%	Chapters/ episodes	%	Hours	%
NATIONAL (total)	**20**	**38.5**	**929**	**32.1**	**933:11**	**32.2**
OBITEL COUNTRIES (total)	**32**	**61.5**	**1966**	**67.9**	**1968:32**	**67.8**
Argentina	0	0.0	0	0.0	00:00	0.0
Brazil	3	5.8	317	10.2	319:55	11.0
Chile	0	0.0	0	0.0	0:00	0.0
Colombia	4	7.7	234	8.1	234:56	8.1
Ecuador	0	0.0	0	0.0	0:00	0.0
Spain	1	1.9	23	0.8	22:36	0.8
USA (Hispanic production)	20	38.5	929	31.1	933:11	32.2
Mexico	24	46.2	1392	48.1	1391:05	47.9
Peru	0	0.0	0	0.0	0:00	0.0
Portugal	0	0.0	0	0.0	0:00	0.0
Uruguay	0	0.0	0	0.0	0:00	0.0
Venezuela	0	0.0	0	0.0	0:00	0.0
CO-PRODUCTIONS (total)	**5**	**9.6**	**238**	**8.2**	**237:28**	**8.2**
USA Hispanic co-productions	**5**	**9.6**	**238**	**8.2**	**237:28**	**8.2**
Co-productions Obitel countries	**0**	**0.0**	**0**	**0.0**	**0:00**	**0.0**
TOTAL	**52**	**100.0**	**2895**	**0.0**	**2901:42**	**100.0**

Source: Obitel USA – Nielsen

In relation to the origin of the fiction, Mexico continues to have a central place as provider of titles, with 46% of the total premiered titles, mainly driven by the programming agreement of Univision with Televisa, which not only ensures the Mexican product to secure a space in prime time, but also inhibits Univision to grow the production of its original titles on a larger scale. Another programming agreement that maintains the place of Mexico is that of HC2 Holding Corporation, owners of Azteca América with TV Azteca from Mexico. The second position is occupied by the US Hispanic production, with 39% of premiered titles, which also, in turn, has strong links with Mexican corporations through co-production or collaboration. They are followed by Colombia and Brazil, with four and three premiered titles respectively; together, they represent 15% of the premiered titles in 2018. However, Colombia, like Mexico, has a higher participation through its presence in the national production as a co-producer or as a collaborator through its producers in Colombia, but also in Mexico, with TeleMéxico, owned by Fox-Telecolombia. Spain had marked its presence with one new title.

Table 3. Formats of national and Ibero-American fiction

Format	National						Ibero-American					
	Titles	%	C/E	%	H	%	Titles	%	C/E	%	H	%
Telenovela	14	70.0	858	92.4	860:30	92.2	22	68.8	1446	73.6	1445:35	73.4
Series	5	25.0	64	6.9	65:40	7.0	7	21.9	133	6.8	132:58	6.8
Miniseries	0	0.0	0	0.0	0:00	0.0	0	0.0	0	0.0	0:00	0.0
Telefilm	0	0.0	0	0.0	0:00	0.0	0	0.0	0	0.0	0:00	0.0
Unitary	1	5.0	7	0.8	7:00	0.8	3	9.4	387	19.7	389.59	19.8
Docudrama	0	0.0	0	0.0	0:00	0.0	0	0.0	0	0.0	0:00	0.0
Others	0	0.0	0	0.0	0:00	0.0	0	0.0	0	0.0	0:00	0.0
Total	**20**	**100.0**	**929**	**100.0**	**933:10**	**100.0**	**32**	**100.0**	**1966**	**100.0**	**1968:32**	**100.0**

Source: Obitel USA – Nielsen

Telenovelas continue to be the most visible fictional product, with 36 titles out of 52, corresponding to 69% of the titles, but, in terms of hours, they represent 80% of the total of premiered fiction. However, this year saw an increase in the presence of the series format. Despite the fact that the total number of premiere fiction decreased, the number of series increased in relation to last year. In 2018, 12 series were released, which means a 50% increase in relation to the eight premieres in 2017. The number of unitaries fell from five in 2017 to three in 2018.

Table 4. The ten most watched titles in open television

	Title	Country of origin of idea or script	Network	Format/ Genre	N. of chap./ ep. in 2018	Rating	Share
1	*Mi Marido Tiene Familia*	South Korea	Univision	*Telenovela*/ comedy	10	8.7	15.1
2	*Enamorándome de Ramón*	Venezu-ela	Univision	*Telenovela*/ romantic comedy	11	8.3	15.8
3	*El Señor de los Cielos 6*	USA	Telemundo	*Telenovela*/ narco-thriller	99	7.7	16.9
4	*El Rico y Lázaro*	Brazil	Univision	*Telenovela*/ religious-historic	185	7.1	14.7
5	*Papá a Toda Madre*	Mexico	Univision	*Telenovela*	100	6.8	13.2
6	*La Rosa de Gua-dalupe*	Mexico	Univision	Unitary	139	6.6	14.4
7	*Enemigo Íntimo*	USA	Telemundo	*Telenovela*/ police thriller	53	6.5	13.9
8	*Caer en Tentación*	Argentina	Univision	*Telenovela*/ romantic police	43	6.5	13.9
9	*Sin Senos Sí Hay Paraíso*	Colombia	Telemundo	*Telenovela*/ police thriller	63	6.5	13.7
10	*Bella y Bestias*	Colombia	Univision	*Telenovela*/ thriller	66	6.1	12.8
Total productions: 10				**Foreign scripts: 8**			
100%				80%			

Source: Obitel USA – Nielsen

Although *El Señor de los Cielos 6* is in the third place in the table of the most viewed fictions, it is actually the most successful fiction product, with the highest rating and share throughout the year. This is due to the fact that *Mi Marido Tiene Familia* and *Enamorándome de Ramón*, fictions that occupy the first and the second places respectively, were broadcast only in the first two weeks of January, with their final episodes. Meanwhile, since its premiere, *El Señor de los Cielos 6* was above all the fictions during the year, and during its 99 episodes. Actually, the second most successful *telenovela* during the year was *El Rico y Lazaro*, by Record, leaving the Mexican production of Televisa *Papa a Toda Madre* in the third place. An interesting fact to note is that *Rey David*, a Brazilian production of Record, which also only had its final broadcast in the first week of January, reached a 9.1 rating and 16.7 points of share, being the highest scores of any fiction in the year. However, *Rey David* is a reprise and did not count as a premiere this year, as the *telenovela* had already been broadcast by MundoFox in 2013.

Table 4a. The ten most watched national titles in open television

Title		Country of origin of idea or script	Network	Format/ genre	N. of chap./ ep. in 2018	Rating	Share
1	*El Señor de los Cielos 6*	USA	Telemundo	*Telenovela*/ narco-thriller	99	7.7	16.9
2	*Enemigo Íntimo*	USA	Telemundo	*Telenovela*/ police thriller	53	6.5	13.9
3	*Sin Senos Sí Hay Paraíso*	Colombia	Telemundo	*Telenovela*/ police	63	6.5	13.7
4	*Bella y Bestias*	Colombia	Univision	*Telenovela*/ thriller	66	6.1	12.8
5	*Amar a Muerte*	Venezuela	Univision	*Telenovela*/ thriller	39	6.0	13.8
6	*Falsa Identidad*	USA	Telemundo	*Telenovela*/ romantic thriller	73	6.0	12.2
7	*Señora Acero 4*	USA	Telemundo	*Telenovela*/ narco-thriller	37	6.0	12.6

8	*Mi Familia Perfecta*	USA	Telemundo	*Telenovela*/ melodrama	10	5.5	12.0
9	*Al Otro Lado del Muro*	USA	Telemundo	*Telenovela*/ thriller	78	5.3	10.5
10	*Sangre de mi Tierra*	USA	Telemundo	*Telenovela*/ romantic melodrama	36	5.1	9.7
Total productions: 10				**Foreign scripts: 3**			
100%				30%			

Source: Obitel USA – Nielsen

In the table of the most successful national productions, Telemundo occupies the first three places, and *El Señor de los Cielos* became the most successful Hispanic television fiction of all time. It is important to note that the two Hispanic television productions transmitted by Univision are actually products made in Mexico, but with the co-production of W Studios, the production entity based in Miami, founded by Patricio Wills, who is now also in charge of the Content Division of Univision and Televisa in Mexico. While Telemundo has been working with the action thriller, producing what were previously known as *narconovelas*, and now are publicized as superseries, the inclusion of Patricio Wills brings this approach to Televisa and Univision through stories where action-oriented thrillers based on police-crime genres are also important components in these new stories.

Table 5. Audience profile of the ten most watched titles: gender and age

Title		Network	Gender %	
			Female	Male
1	*Mi Marido Tiene Familia*	Univision	64.7	35.3
2	*Enamorándome de Ramón*	Univision	63.5	36.5
3	*El Señor de los Cielos 6*	Telemundo	52.9	47.1
4	*Rico y Lázaro*	Univision	65.4	34.6
5	*Papa a Toda Madre*	Univision	66.2	33.8
6	*La Rosa de Guadalupe*	Univision	64.4	35.6
7	*Enemigo Íntimo*	Telemundo	56.6	43.4
8	*Caer en Tentación*	Univision	68.9	31.1

9	*Sin Senos Sí Hay Paraíso*	Telemundo	59.7	40.3
10	*Bella y Bestias*	Univision	63.3	36.7

Title		Network	Age Group %					
			2 to 11	12 to 17	18 to 24	25 to 34	35 to 49	50+
1	*Mi Marido Tiene Familia*	Univision	11.9	5.0	5.4	15.6	25.1	36.9
2	*Enamorándome de Ramón*	Univision	13.7	4.8	4.7	14.2	25.0	37.5
3	*El Señor de los Cielos 6*	Telemundo	9.0	4.2	6.8	18.3	31.4	30.4
4	*Rico y Lázaro*	Univision	10.8	4.4	4.6	11.6	22.5	46.2
5	*Papa a Toda Madre*	Univision	11.9	5.7	6.5	14.6	25.3	36.0
6	*La Rosa de Guadalupe*	Univision	14.8	5.6	5.9	13.1	23.1	37.6
7	*Enemigo Íntimo*	Telemundo	8.6	3.4	5.5	15.9	30.6	35.9
8	*Caer en Tentación*	Univision	9.7	4.6	5.9	13.0	25.4	41.5
9	*Sin Senos Sí Hay Paraíso*	Telemundo	9.6	4.4	9.1	18.2	26.8	31.8
10	*Bella y Bestias*	Univision	9.5	4.7	4.3	11.4	23.1	47.1

Source: Obitel USA – Nielsen

In terms of audience profile, it is clear that there is a larger presence of male viewership in the titles publicized by Telemundo as superseries, as a strong indication of superseries incursion into the male market. All three titles of Telemundo have male audiences above 40%, with *El Señor de los Cielos 6* almost reaching the 50% of male viewership, while the rest of the productions broadcast by Univision have male audiences ranging between 30% and 35%. On the other hand, in terms of age, the three titles of Telemundo also attracted younger audiences, in particular between 18 and 49 years old. In contrast, the titles of Univision have wider audiences among the population above 50 years old. It is important to underline that Telemundo's superseries, although a hybrid of the *telenovela* format, have a thriller and action format that attracts younger and male audiences.

3. Monitoring VoD in 2018

3.1. VoD in the United States

Video on demand is growing in the United States, both in terms of the platforms through which VoD content can be accessed and in the corporations that offer on-demand content in subscription-based systems. In particular, Netflix has dominated the landscape, but Amazon, HBO and Hulu are the other giants of supply in the market. This panorama is to be modified with the next entry of Disney, Warner Media and Apple TV +. Disney bought 21st Century Fox, which has secured a content archive, which already included Marvel and Star Wars, Disney properties too. For its part, AT&T bought Time Warner, and the company's reorganization is putting Warner Media, which owns Turner, and HBO as a new competitor in VoD services. For its part, Apple just launched in early 2019 its original content services Apple TV+, which promises to be a strong competitor to Amazon.

An important feature of the digital panorama in the United States is the variety of options in digital platforms of television and cable channels, through websites or on the different applications designed for the viewers to access the content in an easy way on their smartphones.

Chart 2. VoD in the United States

	Platforms	**Total**
VoD linked to national broadcasting television networks	**Official website (5):** Univision, UniMás, Telemundo, EstrellaTV, Azteca America **YouTube (8):** Univision, Univision Noticias, UniMás, Telemundo, Telemundo Noticias, EstrellaTV, EstrellaTV Comedias, Azteca America **Apps (13):** UVideos, Univision Conecta, UnivisionNow, Univision Noticias, Univision Entertainment, Univision Deportes, Univision Local Stations; Telemundo Entertainment, Telemundo Más, Telemundo Now, Telemundo Deportes, Telemundo Local Stations, Azteca Mas	26

VoD linked to pay television networks	**Official website: 60** US Hispanic networks: 28 Dubbed/subtitled television networks: 12 Ibero-American networks targeting Latinos: 20 **YouTube: 50** Hispanic networks: 22 Dubbed/subtitled television networks: 8 Ibero-American networks targeting Latinos: 20 **Apps: 32** Hispanic networks: 12 Dubbed/subtitled television networks: 13 Ibero-American networks targeting Latinos: 7	142
VoD linked to the telecom corporations	Main telecom corporations: 8 Virtual Multichannel Video Programming Distributors (VM-VPD): 8	16
VoD without links to TV networks	Netflix, Hulu, iTunes, Amazon Prime, Crackle, Google Play, SkyGo, iTunes, YouTube Prime, YouTube TV, Xbox Video, PlayStation Vue, Vudu, Fandor, Shudder, NBA TV, Crunchy-Roll, Microsoft Movies & TV, Mubi, French Film Festival, Vimeo, Vevo, Vemox, Pluto TV, AppleTV, Android TV, Amazon FireTV, Chromecast, Roku, CinemaNow, IndieFlix, Popcornflix, Rovi, SnagFilms, Pantaflix	35
TOTAL GENERAL		**219**

Source: Obitel USA

3.2. Earnings of VoD systems

Netflix, the service giant of VoD, closed 2018 with 139 million users and revenues of US$ 1.6 billion. The growth in subscribers is mainly generated by its expansion at the international level. However, in the last quarter of 2018, it received US$ 4,187 million, less than the US$ 4,210 expected. Meanwhile, Amazon, which has grown to be the second most valuable company in the world with its Digital Cloud (AWS) business and digital retailer, which includes its Amazon Prime Video VoD business, had an income of US$ 232.9 billion. Amazon has more than 100 million subscribers to its Amazon Prime service, which gives the company an income of about US$ 7 billion a year. Hulu, the other great company, jointly owned by Disney and Comcast, reached, by the end of 2018, a portfolio of US$ 25 million subscribers and US$ 1.5 billion dollars in advertising revenue.

3.3. Analysis of VoD in 2018: national and Ibero-American premiere fiction

US Hispanic television fiction in Spanish has little or no incentive to be released in the US on a digital platform, since its main screen of delivery is still the major broadcasting television networks in the US. This does not mean that there is not a dynamic relationship with the main providers of VoD in the United States. First, in co-production strategies with Netflix or with Amazon, in which the first window will always be the television screen, and then its distribution on the internet, where it is released almost simultaneously. Therefore, if we were to look for the inventory of the "national" offer, that is "Hispanic" offer, the United States would have a nonexistent presence in the platform. In the case of VoD, the national premieres will be considered broadly, including premiere production in English. The titles produced by Netflix out of the US and out of the Ibero-American countries were not considered in this list.

Table 6. National and Ibero-American titles broadcast in VoD systems in 2018

Premiere national titles in VoD	**National co-productions with Obitel countries in VoD**	**Premiere titles imported from Obitel countries in VoD**
Netflix – 29 English-language titles 29 series **Amazon – 18 English-language titles** 12 series 3 unitaries 3 others (TV films) **Hulu – 9 English-language productions** 7 series 2 unitaries	**Netflix – 15 titles** 1. *Edha 1* (series – Argentina) 2. *The Mechanism 1* (series – Brazil) 3. *3% 2* (series – Brazil) 4. *Samantha!* (series – Brazil) 5. *Pacto de Sangre* (series – Brazil) 6. *Distrito Salvaje* (series – Colombia) 7. *Élite* (series – Spain) 8. *La Catedral del Mar* (series – Spain) 9. *Cable Girls 3* (series – Spain) 10. *Paquita Salas 2* (series – Spain)	**Netflix – 12 titles** 1. *Encerrados* (series – Argentina) 2. *El Marginal 2* (series – Argentina) 3. *Undercover Law* (*Telenovela* – Colombia) 4. *La Reina del Flow* (*Telenovela* – Colombia) 5. *Tiempos de Guerra 1* (series – Spain) 6. *El Ministerio del Tiempo 1* (series – Spain) 7. *El Ministerio del Tiempo 2* (series – Spain) 8. *El Ministerio del Tiempo 3* (series – Spain) 9. *La Casa de Papel 2* (series – Spain)

	11. *La Balada de Hugo Sánchez* (series – Mexico) 12. *La Casa de las Flores 1* (series – Mexico) 13. *Ingobernable 2* (series – Mexico) 14. *Narcos: Mexico* (series – Mexico) 15. *Diableros 1* (series – Mexico) **Amazon – 2 titles** 1. *Diablo Guardian 1* (series – Mexico) 2. *Extraño Enemigo 1* (series, drama – Mexico) **Hulu – 0**	10. *Welcome to the Family* (series – Spain) 11. *Cocaine Coast* (series – Spain) 12. *Fugitiva* (series – Spain) **Amazon – 0** **Hulu – 0**
Total: 56	**Total: 17**	**Total: 12**
TOTAL: 85 titles		

Source: Obitel USA

With 73 titles, the national production clearly leads the premieres on VoD platforms. Netflix is the main content provider: of the 85 releases, 56 premiered on Netflix, followed by 20 on Amazon and nine on Hulu.

Table 7. Premiere fiction in VoD in 2018: countries of origin

Country	Titles	%
NATIONAL (total)	**73**	**86.0**
OBITEL COUNTRIES (total)	**12**	**14.0**
Argentina	2	2.5
Brazil	0	0.0
Chile	0	0.0
Colombia	2	2.5
Ecuador	0	0.0
Spain	8	9.4
USA	74	86.0
Mexico	0	0.0
Peru	0	0.0
Portugal	0	0.0
Uruguay	0	0.0
Venezuela	0	0.0

CO-PRODUCTIONS (total)	**17**	**20.0**
USA co-productions	**17**	20.0
Co-productions between Obitel countries	**0**	0.0
TOTAL	**85**	**100.0**

Source: Obitel USA

The Spanish series have found, in digital platforms, an important space of visibility for the US market. Colombia has two *telenovelas* and Argentina has two series. Great part of the Ibero--American productions, which were separates under the heading of co-productions, with 17 titles, is actually Netflix's productions on request at key production centers in the region, such as Mexico, Spain, Brazil and Argentina. Netflix owns most of these productions, as well as their international distribution rights.

Table 8. Formats of national and Ibero-American fiction in VoD

Format	National				Ibero-American			
	Titles	%	C/E	%	Titles	%	C/E	%
Telenovela	0	0.0	0	0.0	2	16.7	175	60.3
Series	65	89.0	637	94.5	10	83.3	115	39.7
Miniseries	0	0	0	0	0	0.0	0	0.0
Unitary	5	6.8	34	4.9	0	0.0	0	0.0
Others	3	4.0	3	0.4	0	0.0	0	0.0
Total	73	100.0	674	100.0	12	100.0	290	100.0

Source: Obitel USA

In contrast to the prevalence of *telenovelas* in the open television services in Spanish, in the platforms the most important format is series. Out of the 85 total releases in the year, 75 were series.

4. Fiction analysis: open TV, VoD and transmedia expressions in networks[3]

Transmedia narratives in *El Señor de los Cielos* were a central element in the construction of an extended fictional universe across its first five seasons. The show grew by using different narrative strategies: first, with the creation of "secret chapters", which were released first in the internet and launched between seasons; second, with the comic created from the first season; third, with the interactive games offered on Facebook for fans "Visit Aurelio Casillas in prison" or "Search for an organ to save Aurelio's life in the hospital"; and fourth, with the extended life of characters or actors through different social networks (YouTube, Twitter, Instagram). But, in the summer of 2018, something extraordinary happened in the middle of the sixth season: the disappearance of Aurelio Casillas' character on the television screen, coupled with the disappearance of Rafael Amaya, the actor performing as *El Señor*, in public life, which overwhelmed social media. This sudden absence sparked a series of rumors about the reasons of the character disappearance as well as the actor's, and his possible return at the end of the season. The absence and strategies implemented by Telemundo to keep the superseries going unleashed a series of movements in the world of fiction, in which the universes of different series and their characters also intersected, creating a transmedia meta-universe of fiction within fiction.

In mid-July, within the superseries, the character Aurelio Casillas suffered from a shot in the head by the Colombian character El Capo, which left *El Señor* in a coma. Removing Aurelio from the plot triggered a whole series of controversies about the reasons for his absence, and also a wave of criticism towards Telemundo, with fans threatening not to watch *El Señor de los Cielos* until the return of Aurelio Casillas/Rafael Amaya. It must be remembered that *El*

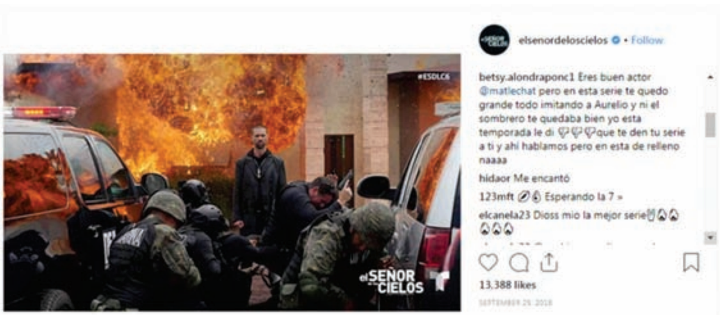
[3] This section was written with the collaboration of Estefani Alarcón, student of the program of Media, Culture and Communication at New York University (NYU).

Señor was the most successful fiction of 2018 and the most successful fiction franchise in the history of Spanish-language television in the US. The exit of the main character could threaten the successful trajectory of this superseries.

The departure of Aurelio from the plot was explained in some media as part of a disagreement between Rafael Amaya and Telemundo production team. Within this explanation, it was said that Rafael asked for more money, but the company refused to increase his salary. Also, another rumor was that the actor had problems with drugs and an episode of relapse had motivated the production to end the relationship with the actor. However, the official version issued by Telemundo and echoed in the press was that Rafael Amaya contracted a rare disease when he was recording some episodes of *El Señor* in Turkey, in a location with caves infested with bats. So, it was officially circulated that Rafael Amaya developed histoplasmosis, as a result of breathing mushrooms that grow in the bat's excrement. This version gained strength since not only Aurelio disappeared from the *telenovela*, but Rafael Amaya himself disappeared from public life. Everyone, in the press and on social media, wondered where Rafael Amaya was, and the answer given by the production and his production partners was that he was recovering. From there, a whole story was created, in which the narrative of his illness was somewhat fused with the idea of a dispute with the television station. In that version, it was corroborated that Rafael was sick of histoplasmosis, but that the severity of the illness was linked to a past of drug abuse and a weakened immune system. A whole plot of speculations arose, simultaneous to the plot of the *telenovela*. Thus, the long absence of Aurelio caused Telemundo to introduce a new character in the plot to replace, assumingly temporarily, Aurelio Casillas.

The introduction of Matías Novoa as El Águila Azul, or Amado Leal (Casillas), Aurelio's brother, triggered a lot of speculation in and outside the plot. The profile of the new character, even the physical resemblance, clearly pointed to a character substitution, to which the audience refused.

The inclusion of Matías Novoa as Amado Casillas offers an interesting case, in which the movement of actors and characters in the narrative universe of crime and drug trafficking are intertwined, creating connections and routes of meaning of a narrative world of fiction beyond particular fictions. Matías came from a recent leading role in another Telemundo superseries, titled *Enemigo Íntimo*, alongside Fernanda Castillo and Raúl Méndez, two actors who, before, played Mónica Robles and Victor Casillas "Chacorta" next to Aurelio Casillas in *El Señor de los Cielos*. Interestingly, after Matías Novoa shared a story of life in prison, corruption and crime in *Enemigo Intimo* acting alongside these two very well-known actors, the next step was his incorporation in *El Señor de los Cielos* as Aurelio Casillas' brother.



Despite its success, the sixth season of *El Señor* lost a half million viewers in its final chapter, arguably due to the absence of Rafael Amaya. The seventh season is in production, and the press and social media are wondering if Rafael will be in the new installment of the superseries. For now, stories, gossip and connections are still alive in social media, and the world of reality becomes as enigmatic and inscrutable as that of fiction itself.

5. Highlights of the year

The year 2018 was characterized by four main types of fiction narratives that reigned on Telemundo's programming grids in prime time. First, prime time continued to be led by the superseries, with *narconovelas* such as *El Señor de los Cielos*, *Señora Acero* and *Sin Senos Sí Hay Paraíso*. Second, the network premiered *Enemigo Íntimo* and *El Recluso*, with narratives anchored in the universe of crime and corruption in the prison system. Third, the *telenovelas Del Otro Lado del Muro* and *Mi Familia Perfecta* reflect the variety of challenges that the crossing of borders imposes on immigrants and their families in their resettlement as citizens. What would be a fourth tendency is based on the narratives focused on great personalities of popular culture, particularly singers, but not exclusively. At the beginning of 2018, *José José*, series produced by Estudios TeleMéxico (Fox), was released with mixed results. And, in April 2018, Telemundo premiered on Sunday *Luis Miguel, la Serie*, produced by MGM and the Mexican firm Gato Grande Productions.

One of the most important strategies launched in 2018 was the premiere of *El Recluso*, by Telemundo. *El Recluso* is an adaptation of the Argentinean series *El Marginal*. What makes its premiere an unusual event is that *El Recluso* was scheduled from Monday to Friday in prime time only for two weeks, under the concept of "premium series". The logic of the network was to raise the levels of daily routine production of the programming with quality of series, and not of *telenovelas*. A crucial trend is that Telemundo's fictions, although accessible on its website, premiered on Netflix for consumption by digital media in record time.

Univision opened its doors to religious fiction with the miniseries *Rey David* in 2017. In 2018, religious fictions played a central role in Univision's prime time with *Jesús de Nazareth* and *El Rico y Lázaro*, which gave the Brazilian network Record such a visibility that Globo has never had. Univision premiered the third season of *El Chapo*, but the appointment of Patricio Wills, in March 2018, as Televisa's content director was a sign of the most determined turnaround that the Mexican company is having in relation to its production of content for prime time, which should be reflected in Univision's future offer. Wills, executive producer of the successful *Reina del Sur* for Telemundo, produced for Televisa and Univision *La Piloto*, a new *telenovela* focused on action, crime and transnational mobility. In 2018, *La Bella y las Bestias* premiered, followed by *La Piloto 2* on Univision, which reinforced the shift towards fiction to attract young and masculine audiences. Univision also found a successful route with *telenovelas* such as *Amar sin Ley* and *Amar a Muerte*.

6. Theme of the year: television distribution models by the internet: actors, technologies, strategies

Different modalities of use of television content in digital platforms have been imagined since the worldwide web broke out in a massive way in the mid-1990s. It was in the 2000s when, thanks to the improvement of support of the network infrastructure, which made the sending of video through streaming services more efficiently possible, there was a decisive emergence of different VoD services.

Through “TV Now” on their online portals, the national television networks started offering their programming through continuous “live” television signals in the United States. The only thing that is required to access this signal service is having a cable provider through which the network’s website offers the programming in real time. The national broadcasters of English television ABC, NBC and Fox allow users to have access to their live signal through their cable providers. In contrast, to promote its own streaming service, CBS only allows access to the live feed through said streaming service. In the case of Univision, if the user does not have a cable provider, it is possible to access its live programming online, by subscribing to Univision Now service. For Telemundo, the user can access it through a cable provider such as Spectrum, Verizon, Dish, DirecTV Now or RCN (Residential Communications Network); If there is no cable provider, it is also possible to access it through an OTT provider, such as YouTube TV, Hulu, or FuboTV. In the case of the small Hispanic television networks, neither EstrellaTV nor Azteca America have streaming services for their live programming.

Internet television infrastructure: an inventory of the main players in the US

In this section, we identify four levels of participation, or layers, within the infrastructure of internet television (VoD): portals for internet television VoD; internet service providers; content distribution networks (CDNs); and digital intermediaries. This is a categorization that points to central actors in the process of offering and distributing television content over the internet, but under no circumstances is it an exhaustive taxonomy. Not only the levels but also the number of participants in the internet network (which in fact is a global web of a great diversity of networks, technologies and modes of connection and distribution, with its different nodes, face-to-face points and strategies) make our categorization limited, but focused on participants and modalities of distribution, which are characteristic of the practices of the most important internet TV offer sites, such as Netflix, Amazon, Hulu and YouTube.

a) Internet portals

The main portals providers of internet television (VoD) in the US by the number of its subscribers, visitors or scope of services are: Netflix, Amazon Prime, Hulu, HBO Go/Now, Google Play, iTunes, Crackle, YouTube Premium, Play Station Store, Xbox Store/Microsoft, Sling, Vudu and Sky Go. Netflix has around 148 million subscribers in the world, of which about 60 million are from the United States. Amazon Prime has 101 million subscribers, of which 26 million follow their digital content in the United States alone. Hulu already has 25 million subscribers. Sony Crackle had around 18 million subscribers at the end of 2017. For its part, HBO, with its HBO Go and HBO Now services, has already reached more than 5 million subscribers. CBS has 5 million subscribers. YouTube Premium had 1.5 million subscribers in 2016, but the lack of subscriptions is moving them to an advertising model in the last year. Microsoft, with its Xbox Live service, has 59 million active members. iTunes has around 30 million subscribers.

b) Telecom internet service providers (material infrastructure support)

The telecommunications sector, traditionally led by information and communication technology companies, is composed of three major subsectors: telecommunications equipment; telecommunication services; and wireless communication. For purposes of our theme of the year, we are going to focus only in the internet service sectors and in the mobile and wireless service provider corporations. These services are divided under two categories of business within the corporations: stationary internet services (internet services) and wireless services for mobile telephony (wireless/mobile). An initial list of the most important internet providers by size of their subscription portfolio are: AT&T Internet/Mobility, Comcast Xfinity, Spectrum (Charter), Verizon Internet/Wireless, Cox Communications, Suddenlink and Optimum (Altice), Century Link, T-Mobile, Sprint and TracFone Wireless.

c) Content distribution networks (hardware and software support)

Some of the central actors in the new ecology of digital media, and particularly in the optimal functioning of internet television, are the content distribution networks (CDN). These are networks of data centers and servers that are geographically distributed in a strategic way to optimize the flow and speed of information circulating on the internet.

The content distribution networks are intermediary between the internet portals that offer content and the users that access the portal anywhere in the world. These CDNs pay the different internet service providers (ISP), carriers and/or network operators to host their servers in their data centers. The geographical distribution of the different CDN servers allows the information of the internet portal to be replicated in a way that is geographically close to the user, which optimizes the flow process. This distributive process of data servers that store and replicate information as an umbrella, covering different countries and continents of the world, became an imperative to sustain the amount of information distributed through the new broadband services and, in particular, the services of streaming audio and video from internet television.

Among the global leaders of content distribution networks are Google Cloud Platform (USA), Akamai Technologies (USA), Swarmify (USA), Microsoft Azure (USA), Amazon CloudFront (USA), KeyCDN, Limelight Networks (USA), Cloudflare (USA), Rackspace Cloud (USA), IBM Cloud (formerly SoftLayer Technologies) (USA), Imperva Incapsula (USA), Verizon Digital Media Service (formerly EdgeCast Networks) (USA) and CacheFly (USA). Although these are the most important networks at a global level, it is important to emphasize that the large video on demand portals use the services of a number of different content distribution networks, of different sizes and geographical locations according to the specific place where the user is located.

d) Digital intermediaries (software support)

The level of digital intermediaries in the network infrastructure is probably the opaquest of these levels. Under this heading are corporations that offer a whole series of software services for optimizing the use of data, its quantification and its rationalization, known as data mining, to generate new information about its users and their consumption habits. At this level, the use of algorithms for the supply, selection and design of content production has taken a central preponderance. Thus, the new recommendation systems, in the new consumption landscape in “menu” mode, take center stage. At the same time, there is the development of software for the delimitation of geographic access to content, with the aim of following the exclusive rights of content distribution and copyright. These software became central in the context of content distribution in transnational and global contexts.

In this new media ecology, corporations like BAMtech (Walt Disney Media and MLB Advance Media, USA), NeuLion (William Morris Endeavor, USA), Ooyala/Brighcove (Brightcove, USA), Nexidia (NICE Systems, Israel), Yume (RhythmOne, USA) and thePlatform/Comcast Technology Solutions (Comcast, USA) have become intermediaries of the services offered by the internet portals.

Structure of the industry and its composition from the political economy

From a political economy perspective, ownership and media concentration as well as a one-way street media flow cause concern in terms of transnational media presence, as a result of unequal power relations. For many years, it has been argued that the excessive power and presence of media conglomerates at transnational and global level only reinforces this inequality. A condition that is rooted in the relationship of inequality of nations worldwide, conceived as the relationship of central countries, and semi-peripheral and peripheral countries (Wallerstein, 1979).

The new ecology of digital media and the irruption of internet television through VoD offers force us to analyze the nature of this relationship. Two central questions are presented: first, in which way the new participants of the offer and distribution of television over the internet are a disruptive force in the common order of power of the traditional means of communication; and second, if the new digital ecology opens up better opportunities for participation to corporations and/or countries traditionally located in the semi-periphery, or in the periphery, or on the contrary, it closes more doors by reinforcing entry barriers to the markets, cementing an inequality of participation.

A clear sign of this new media ecology is the new interrelation of dependencies and also of battles for markets between three sectors of the industry (mass media, telecom, and Silicon Valley), which had been somehow historically, technologically, industrially and legally separated as markets. Now, we are witnessing the convergence between the sectors of telecommunications (telecom), the software/hardware industries (Silicon Valley) and those now considered traditional mass media.

Table 9. VoD and the convergence of industrial, technological and economic sectors

Name (parent corporation)	Sector	Modality of participation	Level of market dominance	Country
Netflix	Silicon Valley	Website	First subscription-based VoD distributor	USA
Amazon Prime Video (Amazon)	Silicon Valley	Website, cloud	Second major distributor	USA
Hulu (Comcast, Disney, 21st Century Fox, ATT)	Mass media/ telecom	Website	Third major distributor	USA
HBO Go/Now (ATT/Warner Media)	Mass media/ telecom	Website, cable TV	Fourth major distributor	USA

Google Play	Silicon Valley	App store, cloud	Fifth major distributor	USA
iTunes (Apple)	Silicon Valley	App store, cloud	Sixth major distributor	USA
Sony Crackle	Mass media	Website, Sony Televisión	Seventh VoD distributor	USA/Japan

Source: Obitel USA

From these inventories, there are some important reflections. There is a total hegemony of American corporations in the offer and distribution over the internet. This hegemony is not only reflected in the actors that participate as the "content supply platforms", but decisively in the infrastructure levels of the network of networks: internet providers, content distribution networks, and digital intermediaries. The emergence of Silicon Valley corporations (Netflix, Amazon, Hulu, Google, iTunes) as the most important internet television distributors is evidence of the rise and importance of platform economies. It should be noted that, of the seven most important platforms, only three are owned by traditional media: Hulu owned by Disney, Comcast/NBC; HBO owned by AT&T/WarnerMedia; and Crackle owned by Sony. However, Comcast/HBO and AT&T/Warner Media are corporations that show the convergence of telecom industries and traditional media corporations.

The purchase of WarnerMedia (formerly Time Warner) by AT&T, a telecom sector corporation, talks about the battle that is taking place in the internet television market, a battle that triggered the purchase of 21st Century Fox by Disney, to configure a content package that can compete with Netflix. In early 2019, Apple announced the launch of its streaming service, called AppleTV+, becoming an important rival for Amazon. For their part, executives at NBC, a subsidiary of Comcast, have expressed the intention of the corporation to launch its own content subscription platform next year. CBS has entered this battle with its own subscription system, with a good level of success.

The battle for the market and the offer of internet television is one of the central battles in which the integration and consolidation processes in industrial conglomerates have been hyper-intensified. This new trend has gone beyond the borders of the consolidation of mass media under a single corporate umbrella, to show the consolidation of different industrial sectors (mass media, telecom and Silicon Valley) under a single corporation. The convergence emerging from internet television underscores the challenge that communication policies face in terms of regulating industrial sectors that were traditionally delimited by differentiated rules, thus following the tradition of political economy and its concern for the direction of institutional and media flows between the West and the Global South, where the sustained hegemonic power of Western corporations (particularly the United States) has demonstrated a clear asymmetry and relation of inequality in scope and penetration at the level of the global market.

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10
Uruguay: broadcast television, new players and VoD rules

Authors:
Rosario Sánchez Vilela, Lucía Gadea

1. Uruguay's audiovisual context in 2018

The current Uruguayan media landscape presents new services and national associations, in addition to international ones that have been increasing their presence. New rules of the game were installed with the expansion of video on demand (VoD) and the high penetration of the internet in the population. The traditional players of the broadcast and pay television have felt the impact, and some movements are beginning to take place to try to retain a portion of the market. That is the situation that we will try to describe in this chapter.

1.1. Broadcast television in Uruguay

The Uruguayan broadcast television system remains unchanged: three private channels and two public ones. However, as in the previous edition, for this chapter we did not have the same type of information about TNU, public television, as for the rest of the channels. For this reason, although we considered the programming of the channel in order to identify its Ibero-American television fiction offer, we did not include it in the genre graph due to the impossibility of making an accurate time measurement with the same parameters as those used for the rest of the channels. Nor did we include it in the rating and share graph because public television has not had an audience measurement in the last two years.

Chart 1. National chains/channels of broadcast television in Uruguay

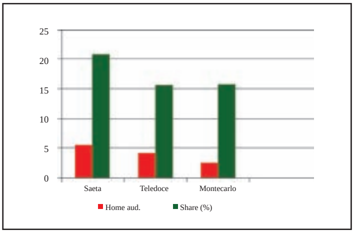
Private chains/channels (3)	Public chains/channels (2)
Saeta Teledoce Montecarlo	Televisión Nacional (TNU) TV Ciudad
TOTAL CHANNELS = 5	

Source: Obitel Uruguay

The annual rating and share averages of private television stations tended to decrease in recent years. In 2016 the rating annual average of broadcast television reached 21 points; in 2017, 19 points; and last year it fell to 18.4. The share, also on the downside, showed that almost half of the TV sets turned on were not on broadcast television.

Graph 1. TV Rating and share by broadcaster

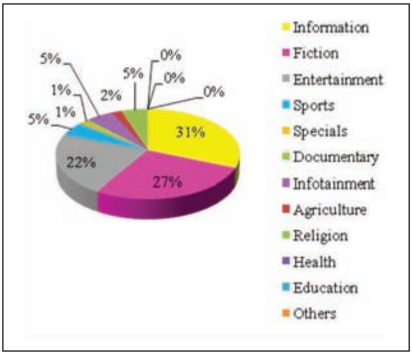
Broadcaster	Home aud.	%	Share (%)
Saeta	7.9	43	21.6
Teledoce	6.2	34	17.1
Montecarlo	4.3	23	12.0
TNU	n.d	n.d	n.d
TV Ciudad	n.d	n.d	n.d
TOTAL	18.4	100	55.8



Source: Obitel Uruguay – Kantar Ibope Uruguay

Graph 2. Genres and hours broadcast on TV programming

Broadcast genres	Exhibition hours	%
Information	6659:10:42	31
Fiction	5779:26:01	27
Entertainment	4832:06:44	22
Sports	1074:45:17	5
Specials	158:53:00	1
Documentary	273:17:40	1
Infotainment	1126:59:26	5



Agriculture	414:14:56	2
Religion	1062:39:42	5
Health	74:58:12	0
Education	66:43:15	0
Others	27:38:22	0
TOTAL	21550:53:17	100

Source: Obitel Uruguay – Kantar Ibope Uruguay

The analysis in terms of the genres aired reveals that, in the three private channels, there was a tendency to assign more hours to information (31%) in first place, secondly to fiction (27%, of all type and origin) and third to entertainment. In each of these categories, the largest audiences are recorded in the news, *telenovelas* and reality shows.

1.2. Pay TV

In 2018 there was a slight increase in the number of television services for subscribers: 735,041 – around 12 thousand more than in the previous year. Besides, 62% of the services were in the interior of the country (Ursec, 2018).

The dominant companies are TCC, Nuevo Siglo, Montecable, CablePlus and Multiseñal among the national ones; and Cablevisión and DirecTV among foreign ones. The latter captures 20% of the market in Montevideo and 31% in the rest of the country, making a strong competition for national companies. However, the main problem affecting pay television is the expansion of illegal companies that offer access to all signals for a very low cost. This illegal television hacks pay television signals, both Uruguayan and foreign[1], and offers access for a very low fee. The sale is made through Mercado Libre or WhatsApp and the service is provided through the internet.

[1] Todo TV News. Fox y HBO presentarán denuncia contra servicios de TV ilegal en Uruguay. Retrieved on December 3, 2018 from http://www.todotvnews.com/news/FOX-y-HBO-presentarn-denuncia-contra-hackers-que-ofrecen-seales-de-TV-en-Uruguay.html.

1.3. Advertising investments of the year: in TV and in fiction

Advertising investment in television went from 53% of the total investments in 2013 to 43% in 2018. However, it continues to be the medium that gets the highest proportion of advertising investment, although the internet consolidates its growing trend and reaches 17%.[2] According to the data provided by Kantar Ibope for this report, in the slots devoted to fiction, the advertising investment measured in seconds was 2,092,605, representing 21.24% of the total advertising.

1.4. Merchandising and social merchandising

The advertisers with more advertising slots during the broadcast of fiction shows were: Tele Shopping, Unilever, newspaper *El País*, SC Johnson and financial institution Fucac.[3]

Regarding social merchandising, the most relevant issue was the one proposed by the Argentinian production *100 Días para Enamorarse* and the Brazilian *Querer sin Límites*. Both fictions presented characters who experience processes of self-discovery of their transgender identity. At the same time as the vital vicissitudes of these characters were being developed on the screen, in Uruguay the Comprehensive Trans Persons Law was being discussed in Parliament.

1.5. Communication policies

The main incentive to the production of fictional TV shows is the SeriesUy fund. SeriesUy had its second call in 2018, in which *Gris*[4] was selected. It is a police series in eight chapters of 45 min-

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[2] El Observador. La inversión publicitaria en medios uruguayos sigue en caída. Retrieved on December 4, 2018 from https://www.elobservador.com.uy/nota/inversion-publicitaria-en-medios-uruguayos-sigue-en-caida--2018124175349.

[3] Data extracted from Monitor Evolution software, provided by Kantar Ibope Uruguay.

[4] Written by Anthony Fletcher, it will be directed by César Charlone – director, among others, of the film *El Baño del Papa* and the series 3*%* – and Alejandro Bazzano – who directed some chapters of the Spanish series *La Casa de Papel.*

utes each, submitted by the production company Magenta. SeriesUy intends to boost and globalize national production and generate a dynamic of continuity.

In the same direction, other public policy definitions were announced in December 2018, when the Ministry of Industry and Energy presented a "road map for the creative industries". The objectives are: to strengthen the production of national audiovisual content and situate what it calls Uruguay Audiovisual, with "the promotion of the insertion of national companies in the global audiovisual chain and the attraction of international audiovisual productions; and the development of a National Audiovisual Observatory" (Uruguay Transforma, 2019: 104). A non-reimbursable promotion fund of 4 million dollars from the National Development Agency (Ande) is announced in order to attract international productions for national realization, as well as tax incentives and corporate income tax exemptions.

Regarding the legislative area, the regulation of the Law on Audiovisual Communication Services (LSCA), of 2014, still has not been laid down. Nor the Audiovisual Communication Council (CCA) was appointed, which is the central body that creates the law. However, the LSCA is enforced and, among other relevant aspects, stands out that broadcast television networks have the obligation to provide free spaces for public good campaigns.

1.6. Digital and mobile connectivity infrastructure

In 2018 the number of households with Wi-Fi reached 73% (3 percentage points more than the previous year), the number of internet users reached 89% and continues to grow especially among those over 65 years old, of which 78% are already internet users. Likewise, the difference between high and low socioeconomic levels continues to decrease (Grupo Radar, 2018).

However, the WIP+Disto Uruguay 2017 survey (Dodel and Aguirre, 2018) offers a different view regarding the digital divide. Although there is a significant increase in households with connectivity, there is an access gap in terms of educational and socioeconomic level: high-level households double the access of the lowest ones.

On the other hand, El Perfil del Internauta Uruguayo 2018 reveals new features regarding the uses: in 2017 YouTube was the most used to watch videos, movies or on-line series, but by 2018 Netflix exceeded this platform, reaching more than 1 million users; the number grew by 67% with respect to the previous year (Grupo Radar, 2018).

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

Table 1. Fiction broadcast in 2018

PREMIERE NATIONAL TITLES – 2	PREMIERE FOREIGN TITLES – 19
Televisión Nacional – 1 title 1. *Todos Detrás de Momo* (miniseries) **Teledoce – 1 title** 2. *Voces Anónimas* (others) **CO-PRODUCTIONS – 4** **Montecarlo – 4 titles** 3. *El Regreso de Lucas* (*telenovela* – Argentina, Peru) 4. *Anónima* (series – Colombia, USA) 5. *El Comandante* (series – Colombia, USA, Venezuela) 6. *Los Nuevos Simuladores* (series – Mexico, USA)	**Montecarlo – 4 titles** 7. *100 Días para Enamorarse* (*telenovela* – Argentina) 8. *Adda* (*telenovela* – Argentina) 9. *Golpe al Corazón* (*telenovela* – Argentina) 10. *La Ley del Corazón* (*telenovela* – Colombia) **Teledoce – 9 titles** 11. *Las Estrellas* (*telenovela* – Argentina) 12. *Aguanta Corazón* (*telenovela* – Brazil) 13. *Justicia* (miniseries – Brazil) 14. *La Trampa* (*telenovela* – Brazil) 15. *Querer sin Límites* (*telenovela* – Brazil) 16. *Perdona Nuestros Pecados* (*telenovela* – Chile) 17. *Verdades Ocultas* (*telenovela* – Chile) 18. *En Tierras Salvajes* (*telenovela* – Mexico) 19. *Paquita la del Barrio* (*telenovela* – Mexico) **Saeta – 2 titles** 20. *El Rico y Lázaro* (*telenovela* – Brazil)

	21. *Josué, la Tierra Prometida* (*telenovela* – Brazil) **Televisión Nacional – 4 titles** 22. *Cuéntame 19* (series – Spain) 23. *Bajo Sospecha* (series – Spain) 24. *Servir y Proteger* (series – Spain) 25. *B&B. De Boca en Boca* (series – Spain) **RERUNS – 4 titles** **Saeta – 1 title** 26. *Celia* (*telenovela* – Colombia) **Teledoce – 1 title** 27. *Avenida Brasil* (*telenovela* – Brazil) **Montecarlo – 2 titles** 28. *El Chringuito de Pepe* (series – Spain) 29. *Casados con Hijos* (series – Argentina) **TOTAL OF PREMIER TITLES: 25** **TOTAL OF RERUNS: 4** **TOTAL OF AIRED TITLES: 29**

Source: Obitel Uruguay

Ibero-American fiction experienced a sharp decline in 2018. The offer of fictional TV shows in the last ten years has ranged between 35 and 47 titles per annum, but in 2017 it dropped to 28 and in 2018 to 25.

The channel that offered the most Ibero-American fictional TV shows continued being Teledoce, with nine titles, but with an important change regarding the origin of these fictions: only one comes from Argentina and the rest comes from Brazil (4), Chile (2) and Mexico (2). The agreement that it historically had with Channel 13 from Argentina was broken and, therefore, the fictional TV shows of Pol-ka disappeared from the Uruguayan screen.[5] The Argentinian productions currently shown are linked to another historical agree-

[5] Only *Las Estrellas* was left, whose emission had begun the previous year.

ment between Telefe and Montecarlo, the only channel with fiction of this origin.

Table 2. Fictional titles premiered in 2018: countries of origin

Country	Titles	%	Chapters/ episodes	%	Hours	%
NATIONAL (total)	**2**	**8.0**	**22**	**1.3**	**15:52:41**	**1.1**
OBITEL COUNTRIES (total)	**19**	**76.0**	**1387**	**84.4**	**1246:29:30**	**88.5**
Argentina	4	16.0	364	22.1	283:57:00	20.2
Brazil	6	24.0	570	34.7	391:00:00	27.8
Chile	2	8.0	217	13.2	165:40:30	11.8
Colombia	1	4.0	91	5.5	68:00:00	4.8
Ecuador	0	0.0	0	0.0	0:00:00	0.0
Spain	4	16.0	242	14.7	235:11:00	16.7
USA (Hispanic production)	0	0.0	0	0.0	0:00:00	0.0
Mexico	2	8.0	145	8.8	102:41:00	7.3
Peru	0	0.0	0	0.0	0:00:00	0.0
Portugal	0	0.0	0	0.0	0:00:00	0.0
Uruguay	**2**	**8.0**	**22**	**0.0**	**15:52:41**	**1.1**
Venezuela	0	0.0	0	0.0	0:00:00	0.0
CO-PRODUCTIONS (total)	**4**	**16.0**	**235**	**0.0**	**145:33:00**	**10.3**
Uruguayan co-productions	**0**	**0.0**	**0**	**0.0**	**0:00:00**	**0.0**
Co-productions among Obitel countries	**4**	**16.0**	**235**	**0.0**	**145:33:00**	**0.0**
GENERAL TOTAL	**25**	**100.0**	**1644**	**0.0**	**1407:55:11**	**100.0**

Source: Obitel Uruguay – Kantar Ibope Uruguay

Despite the decrease in the number of titles, the volume of hours increased almost twice with reference to 2017. The largest percentage corresponded to Brazilian fictions. Regarding the formats, the *telenovela* continues to concentrate the most screen time.

Table 3. Formats of national and Ibero-American fiction

Format	National						Ibero-American					
	Titles	%	C/E	%	H	%	Titles	%	C/E	%	H	%
Telenovela	0	0.0	0	0.0	0:00:00	0.0	15	65.2	1491	80.0	1072:50:30	77.0
Series	0	0.0	0	0.0	0:00:00	0.0	7	30.4	357	19.2	307:22:00	22.0
Miniseries	1	50.0	10	45.5	7:33:11	47.6	1	4.3	16	0.9	11:50:00	0.0
Telefilm	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0	0:00:00	0.0
Unitary	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0	0:00:00	0.0
Docudrama	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0	0:00:00	0.0
Others (soap opera, etc.)	1	50.0	12	54.5	8:19:30	52.4	0	0.0	0	0.0	0:00:00	0.0
Total	**2**	**100.0**	**22**	**100.0**	**15:52:41**	**100.0**	**23**	**100.0**	**1864**	**100**	**1392:02:30**	**100**

Source: Obitel Uruguay – Kantar Ibope Uruguay

Table 4. The ten most watched titles on broadcast television

	Title	Country of original idea or script	Channel	Format/ genre	N. of chap./ ep. (in 2018)	Time slot	Rating	Share
1	*Querer sin Límites*	Brazil	Teledoce	*Telenovela*/ fiction	146	Prime time	14.6	21.3
2	*Las Estrellas*	Argentina	Teledoce	*Telenovela*/ fiction	60	Night	12.2	19.6
3	*Josué, la Tierra Prometida*	Brazil	Saeta	*Telenovela*/ fiction	68	Night	11.1	23.6
4	*Perdona Nuestros Pecados*	Chile	Teledoce	*Telenovela*/ fiction	192	Night	10.9	20.4
5	*Verdades Ocultas*	Chile	Teledoce	*Telenovela*/ fiction	25	Prime time	10.1	16.4
6	*El Rico y Lázaro*	Brazil	Saeta	*Telenovela*/ fiction	155	Night	9.7	21.1
7	*Justicia*	Brazil	Teledoce	Miniseries/ fiction	16	Night	9.0	15.6
8	*100 Días para Enamorarse*	Argentina	Montecarlo	*Telenovela*/ fiction	125	Prime time	9.0	13.2
9	*Paquita la del Barrio*	Mexico	Teledoce	*Telenovela*/ fiction	75	Afternoon	8.5	16.2
10	*En Tierras Salvajes*	Mexico	Teledoce	*Telenovela*/ fiction	70	Afternoon	7.3	18.1
Total productions: 10				**Foreign scripts: 10**				
100%				100%				

Source: Obitel Uruguay – Kantar Ibope

In the ranking of the ten most watched titles of the year, the scarce presence of Argentine titles stands out. This is consistent with the general decline in fictional TV shows of that origin. Four of the most watched titles are from Brazil and, if we consider the volume of episodes premiered, almost 50% correspond to Brazilian fictions. The Chilean *telenovela* has been consolidating its presence in the offer of recent years and the two titles that were exhibited integrated the top ten. The picture is completed with two Mexican fictions.

It is important to consider in this analysis the relationship of these preferences with the strong presence of Turkish fiction in the offer. In 2018 there were eight premiere titles and some of them obtained a better performance in terms of rating and share than the Ibero-American top ten.

Titles	Rating	Share
Mi Vida Eres Tu	15.2	24.7
Quién se Robó mi Vida	13.7	24.8
Flores de Cristal	13.0	22.9
Tormenta de Pasiones	11.5	23.5
Infiltrado DH	11.5	17.6
Amor Eterno	10.7	23.1
Paramparca	8.7	17.9
Inolvidable	6.8	16.6

Source: Obitel Uruguay – Kantar Ibope Uruguay

Table 4a. The ten most watched national titles on broadcast television

	Title	Country of original idea or script	Channel	Format/genre	N. of chap./ep. (in 2018)	Time slot	Rating	Share
1	*Todos Detrás de Momo*	Uruguay	TNU	Miniseries	10	Prime time	n.d.	n.d.
2	*Voces Anónimas*	Uruguay	Teledoce	Others	12	Night	6.8	14.8

Source: Obitel Uruguay – Kantar Ibope Uruguay

Only two national titles were released during the year. *Todos Detrás de Momo* was the highlight of recent years and we will devote section 5 to it. *Voces Anónimas* was first aired in 2006. Originally, it was a documentary with a presenter who told a story or urban legend of terror, with testimonials, specialized voices and small dramatizations. In the 2018 season of the program, the fictional component became central: drama scenes of 15 to 20 minutes and less time devoted to the testimonies. The production's effort in the fictional scenes is also noticeable: there are usually between two to four actors and a vintage setting in one or two locations. This shift towards fiction led to including it in the table this year.

Table 5. Audience profile of the ten most watched titles: gender, age, socioeconomic status

	Title	Channel	Gender %		Socioeconomic status %				
			Women	Men	A+A-	M+	M	M-	B+B-
1	*Querer sin Límites*	Teledoce	68.2	31.8	14.2	18.1	24.0	14.3	29.0
2	*Las Estrellas*	Teledoce	63.6	36.4	18.5	16.9	24.6	12.4	27.7
3	*Josué, la Tierra Prometida*	Saeta	71.7	28.3	9.9	16.4	20.3	14.8	38.6
4	*Perdona Nuestros Pecados*	Teledoce	71.0	29.0	16.5	15.9	25.6	14.9	27.1
5	*Verdades Ocultas*	Teledoce	66.4	33.6	14.1	8.1	16.8	19.0	42.1
6	*El Rico y Lázaro*	Saeta	74.0	26.0	7.5	17.5	18.5	17.9	38.6
7	*Justicia*	Teledoce	61.9	38.1	14.7	17.5	18.5	17.2	32.2
8	*100 Días para Enamorarse*	Monte-carlo	68.0	32.0	17.3	27.7	17.4	14.9	22.8
9	*Paquita la del Barrio*	Teledoce	66.0	34.0	8.0	18.0	28.0	14.9	31.0
10	*En Tierras Sal-vajes*	Teledoce	59.2	40.8	8.6	9.5	24.3	17.2	40.4

	Title	Channel	Age group %						
			4-11	12-17	18-24	25-34	35-49	50-59	60+
1	*Querer sin Límites*	Teledoce	4.0	3.0	6.0	11.0	21.0	17.0	37.0
2	*Las Estrellas*	Teledoce	3.9	5.3	7.6	10.8	24.0	15.9	32.7
3	*Josué. La Tierra Prometida*	Saeta	5.1	2.8	2.4	7.4	16.6	14.5	51.3
4	*Perdona Nuestros Pecados*	Teledoce	3.9	4.4	5.0	12.6	21.2	15.0	37.9
5	*Verdades Ocultas*	Teledoce	6.9	4.8	2.2	14.6	22.0	13.3	36.3
6	*El Rico y Lázaro*	Saeta	5.3	2.2	4.6	4.3	16.6	18.8	48.3
7	*Justicia*	Teledoce	5.6	5.4	2.9	14.6	31.8	15.9	23.9
8	*100 Días para Enamorarse*	Monte-carlo	6.4	2.6	4.3	13.4	29.4	10.8	33.1
9	*Paquita la del Barrio*	Teledoce	4.1	3.0	4.9	10.3	24.9	13.4	39.5
10	*En Tierras Salvajes*	Teledoce	4.44	2.02	5.03	11.1	23.81	12.3	41.3

Source: Obitel Uruguay – Kantar Ibope

The top ten audience is composed predominantly of women, especially in fictional TV shows with biblical themes. The male audience was higher in the miniseries *Justice* (38%) and the *telenovela En Tierras Salvajes* (40.8%). As for the socioeconomic profile, the highest percentages of audience are found in the low sectors; nevertheless, it is observed that the middle sector had a greater participation than in the low medium. On the other hand, most of the audience is over 60 years old and the other rank in which the highest percentages were recorded is 35 to 49 years old, while younger audiences have little representation.

3. Monitoring VoD in 2018

In terms of VoD offer in Uruguay, Netflix is the platform where the largest amount of Ibero-American fiction is found. Regarding national fiction, the exhibition this year was on Vera TV, the national public platform, and on Argentinian UN3TV, which proves itself as a relevant actor for the dissemination of Uruguayan webseries.

3.1. VoD in Uruguay

Chart 2. VoD in Uruguay

	Plataforms	Total
VoD linked to brodcast television networks	Canal10.com, Teledoce.com, Montecarlo.com[6]	3
VoD linked to pay television networks	NSNOW, TCC Vivo, Cablevisión Flow, DirecTV Play, MCGO Live, Crackle, Fox Premium, HBO Max	8
VoD linked to telecom companies	VeraTV, ClickVeo!, Claro Video, Movistar Play	4
VoD without links to television networks	Netflix, YouTube, Amazon Prime, HBO Go	4
GENERAL TOTAL		**19**

Source: Obitel Uruguay

The VoD platforms listed in Chart 2 offer different possibilities. The platforms of the open television channels make available

[6] Only the platforms that offer fiction on demand were included in the chart. For that reason, Tnu.com.uy, the platform of the public channel, was not included.

in VoD only some national programs and, for a limited time, some fictional episodes. On the other hand, the platforms linked to pay TV networks – NSNOW, TCC Vivo and Cablevisión Flow – offer packages that give access, for example, to HBO Go. These portals tend to repeat the titles they offer on pay television.

Regarding VoD linked to telecommunications companies, two of the platforms – Vera TV and ClickVeo! – are related to the state telecommunications company, Administración Nacional de Telecomunicaciones (Antel). The first is state-owned and the second is a private enterprise that has an agreement with Antel to use its internet infrastructure.

ClickVeo! is an exclusively Uruguayan content website, created in 2017 with the purpose of attracting subscribers of Uruguayan nationality living abroad and also becoming a producer of national fiction. The latter has not been achieved yet, but by the year 2018 it managed to stabilize commercially and surpassed 2 thousand subscribers. Beneficiaries of the Ibirapitá Plan – program of the Presidency of the Republic that delivers tablets to elderly, retired and low income people – join ClickVeo!. The adaptation for these tablets was created and is available for free download.[7]

3.2. VoD analysis in 2018: national and Ibero-American premiere fiction

In the offer of Ibero-American titles, Netflix has the largest number of TV shows of different origins. Between productions and co-productions, it concentrates 38 titles, which represents 40% of a total of 95 fictions.[8]

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[7] ClikVeo! Ibirapitá. Up to December 2018, there were about 7 thousand downloads and 9,746 reproductions, out of a total of 800 different contents. Information provided by Fabián Curzio, director of ClickVeo!.

[8] Although they have not been included in the tables, it is important to note that illegal platforms have been operating. This is visible, for example, in the Parrot Analytics reports that are produced from demand surveys, where *The Handmaid's Tale* is pointed out as one of the most viewed titles of September 2018. The series corresponds to the Hulu portal, which is not available in Uruguay. Included in this ranking is the series *Cobra Kai*,

Table 6. National and Ibero-American fictions exhibited in VoD systems in 2018

Premiere national titles	Premiere Ibero--American titles	Co-productions
Vera TV – 1 national title 1. *Todos Detrás de Momo* (miniseries) **Teledoce.com – 1 national title** 2. *Voces Anónimas* (others) **YouTube UN3TV – 1 national title** 3. *El Maravilloso Parque Hoolister* (webseries)	**Netflix – 30 Ibero-American titles** 1. *La Casa de las Flores* (series, Mexico) 2. *Club de Cuervos. La Balada de Hugo Sánchez* (miniseries, Mexico) 3. *Club de Cuervos* (series, Mexico) 4. *Diablero* (series, Mexico) 5. *Ingobernable 2* (series, Mexico) 6. *Distrito Salvaje* (series, Mexico) 7. *Yo Soy Yo* (series, Mexico) 8. *El Desconocido* (series, Mexico) 9. *El Recluso* (series, Mexico) 10. *Bienvenidos a la Familia* (series, Spain) 11. *La Casa de Papel* (series, Spain) 12. *Farinha* (series, Spain) 13. *Las Chicas del Cable 3* (series, Spain) 14. *Merlí 3* (series, Spain) 15. *Élite* (series, Spain) 16. *La Catedral del Mar* (series, Spain) 17. *Fugitiva* (series, Spain) 18. *Vivir sin Permiso* (series, Spain) 19. *Psiconautas* (series, Argentina) 20. *El Marginal III* (series, Argentina)	**YouTube UN3TV – 1 Ibero-American title** 1. *Los Demonios* (webseries, Uruguay, Argentina) **Netflix – 8 Ibero-American titles** 2. *Luis Miguel* (series, USA, Mexico) 3. *El Chapo 3* (series, USA, Mexico) 4. *Nicky Jam: El Ganador* (series, USA, Mexico) 5. *El Vato 2* (series, USA, Mexico) 6. *Enemigo íntimo* (series, USA, Mexico) 7. *Rosario Tijeras* (series, USA, Mexico) 8. *José José: El Príncipe de la Canción* (series, USA, Mexico) 9. *Sin Senos Sí Hay Paraíso 3* (series, USA, Mexico, Colombia)

produced by YouTube Premium, which is also not available in the country. Retrieved on March 1, 2019 from http://www.todotvnews.com/news/100-dias-para-enamorarse-entre-lo-mas-demanddado-de-Uruguay.html.

	21. *Edha* (series, Argentina) 22. *Encerrados* (series, Argentina) 23. *3% 2* (series, Brazil) 24. *El Mecanismo* (series, Brazil) 25. *Pacto de Sangre* (series, Brazil) 26. *Samantha* (series, Brazil) 27. *Borges* (series, Brazil) 28. *Super Drags* (series, Brazil) 29. *La Reina del Flow* (series, Colombia) 30. *La Ley Secreta* (series, Colombia) **HBO Go – 3 Ibero-American titles** 31. *Señor Ávila 4* (series, Mexico) 32. *Magnífica 70 3* (series, Brazil) 33. *El Negocio 4* (series, Brazil) **Amazon Prime Video – 1 Ibero-American title** 34. *Un Extraño Enemigo* (series, Mexico) **NSNOW – 5 Ibero-American titles** 35. *Un Gallo para Esculapio 2* (series, Argentina) 36. *El Host* (series, Argentina) 37. *El Lobista* (miniseries, Argentina) 38. *El Secreto de Selena* (series, USA) 39. *Impuros* (series, Brazil) **TCC Vivo – 2 Ibero-American titles** 40. *Desencuentros* (series, Brazil) 41. *Llámame Bruna 3* (series, Brazil)	

	Cablevisión Flow – 7 Ibero-American titles 42. *M (*webseries, Argentina) 43. *Rhizoma Hotel* (miniseries, Argentina) 44. *Morir de Amor* (miniseries, Argentina) 45. *Homicidios* (series, Spain) 46. *Presunto Culpable* (series, Spain) 47. *Cuéntame un Cuento* (series, Spain) 48. *Ojos sin Culpa* (series, Spain) **DirecTV Play – 11 Ibero-American titles** 49. *Luna, el Misterio de Calenda* (series, Spain) 50. *Todo por el Juego* (series, Spain) 51. *El Accidente* (series, Spain) 52. *Los Hombres de Paco* (series, Spain) 53. *Allí Abajo* (series, Spain) 54. *Con el Culo al Aire* (series, Spain) 55. *Doctor Mateo* (series, Spain) 56. *Sin Identidad* (series, Spain) 57. *Apaches* (series, Spain) 58. *Gente Hablando* (miniseries, Spain) 59. *Más de 100 Mentiras* (series, Spain) **Claro Video – 7 Ibero--American titles** 60. *Hijos de su Madre* (series, Mexico) 61. *El Rey del Valle* (series, Mexico) 62. *Blue Demon* (series, Mexico) 63. *La Hermandad* (series, Mexico)	

	64. *El Torito* (series, Mexico) 65. *Entre Olivos* (series, Spain) 66. *La Otra Mirada* (series, Spain) **Movistar Play – 6 Ibero-American titles** 67. *Gigantes* (series, Spain) 68. *Mira lo que Has Hecho* (series, Spain) 69. *Arde Madrid* (series, Spain) 70. *Félix* (series, Spain) 71. *Vergüenza* (series, Spain) 72. *Matar al Padre* (miniseries, Spain) **Youtube UN3TV – 11 Ibero-American titles** 73. *Parecido* (webseries, Argentina) 74. *Sigan Soñando* (webseries, Argentina) 75. *Crónicas Ferreteras* (webseries, Argentina) 76. *Fruta* (webseries, Argentina) 77. *Popovich* (webseries, Argentina) 78. *Leñadores* (webseries, Argentina) 79. *Agregados Recientemente* (webseries, Argentina) 80. *Los Inadaptables* (webseries, Argentina) 81. *Nací Ayer* (webseries, Argentina) 82. *Tarde Baby* (webseries, Argentina) *83. Postres* (webseries, Argentina)	
Total: 3	**Total: 85**	**Total: 7**
GENERAL TOTAL: 95		

Source: Obitel Uruguay

Table 7. Premiere fiction in VoD in 2018: countries of origin

Country	Titles	%
NATIONAL (total)	**3**	**3**
OBITEL COUNTRIES (total)	**83**	**87**
Argentina	21	**22**
Brazil	12	**13**
Chile	0	**0**
Colombia	2	**2**
Ecuador	0	**0**
Spain	31	**33**
USA (Hispanic production)	1	**1**
Mexico	16	**17**
Peru	0	**0**
Portugal	0	**0**
Uruguay	**2**	**2**
Venezuela	0	**0**
CO-PRODUCTIONS (total)	**9**	**9**
Uruguayan co-productions	1	**1**
Co-productions among Obitel countries	8	**8**
GENERAL TOTAL	**95**	**100**

Source: Obitel Uruguay

Table 8. Formats of national and Ibero-American fiction in VoD

Format	National				Ibero-American			
	Titles	%	C/E	%	Titles	%	C/E	%
Telenovela	0	0	0	0	0	0	0	0
Series	0	0	0	0	73	79	1543	91
Miniseries	1	33	10	36	6	7	44	3
Unitary	0	0	0	0	0	0	0	0
Others	2	67	18	64	13	14	116	7
Total	**3**	**100**	**28**	**100**	**92**	**100**	**1703**	**100**

Source: Obitel Uruguay

The national fiction offered in VoD was composed of four titles. The most relevant, *Todos Detrás de Momo*, is available only on Vera TV platform, although in an unfriendly way: the chapters are not in order, so the user has to search for them and organize the viewing. *Voces Anónimas* can be seen on demand on Teledoce platform. On UN3TV YouTube channel[9] are the webseries *El Maravilloso Parque*

[9] By the beginning of 2019, some of its titles available on YouTube are beginning to be shown on Flow, Cablevisión portal, and others are announced on Televisión Nacional, the public television channel.

Hoolister, by Uruguayan producer Finoli Finoli, and *Los Demonios*, created by Daniel Hendler, co-produced by Cordón Films and TV Ciudad (Uruguay) with UN3TV.

4. Highlights of the year

The fictional show *Todos Detrás de Momo*[10] was the highlight of the year for several reasons: it is the first production made from public funds SeriesUy and the most ambitious television fiction performance of those that have been carried out in recent years, with remarkable moments. These statements need more clarification.

The production of Uruguayan television fiction in recent years has been limited to those made with public funds (Sánchez Vilela, 2016, 2017). At the end of 2016, SeriesUy[11] was created, which was publicly presented as a platform that would finance the production of television fictional series of ten chapters between 46 and 48 minutes long and with a view of exporting. The execution instructions stated in the fund's bases indicated that the fiction would have to be done within six months. The winning project would be

[10] It was aired on Fridays at 10 p.m. on the public television broadcasters TV Ciudad, TNU and streaming by Vera+, live and on demand. It is a co-production of Nadador Cine and Le Tiro Cine. Directors: Adrián Biniez and Pablo Stoll. Script: Adrián Biniez, Pablo Stoll and Carlos Tanco. Starring: Néstor Guzzini, Gabriela Freire, Gonzalo Delgado Galiana, Lucio Hernández, Carla Moscatelli, Gustavo Cabrera, Ramiro Perdomo and Matías Singer. It also counted on the special participation of César Troncoso, Julieta Zylberberg, Luis Orpi, Alfonso Tort and the *murga* Cayó La Cabra, among others.

[11] It is an inter-institutional fund that arises from the alliance of the Ministry of Industry, Energy and Mining through its National Directorate of Telecommunications and Audiovisual Communication Services (Miem-Dinatel), the Ministry of Education and Culture, the Office of the Municipality of Montevideo, the National Film and Audiovisual Directorate (Dicau), the public television stations (TNU and TV Ciudad) and Antel, the state telecommunications company. Retrieved on February 20, 2019 from http://www.dinatel.gub.uy/-/sta-abierta-la-convocatoria-seriesuy-que-brinda-fondos-para-la-produccion-de-una-serie -de-ficcion-nacional.

announced in April of each year and it would be issued in October of the same year.[12] While there was some background, today it is the only public fund exclusively aimed at television fiction.

Todos Detrás de Momo was the first selected project (March 2017) of this new orientation of public funds and it premiered on September 28, 2018. This chronology shows that the times designed by SeriesUy were not those of execution. Some difficulties for the filmmakers to access the fund's money, as well as the relationship between the capital that the fund provided and the demands of the fiction that had to be done (number and duration of chapters) could explain the difference.

The value of the fund was 5 million Uruguayan pesos (approximately 147 thousand dollars at the current exchange rate) for a production of ten chapters of about 45 minutes each, which were filmed in eight weeks (between January and March 2018), in different locations and involving a considerable volume of actors, extras and technicians.[13] Budgetary constraints are expressed in the statements of their directors: "It was much more difficult than making a movie. In minutes, they are like four and a half movies, and we filmed them in the same time that I filmed my last film, and with the budget of a film smaller than one that takes eight weeks of shooting", explains Stoll.[14]

[12] Once the winner is known, it has to devote two months to preproduction, with the tutorial by a foreign scriptwriter and producer; then, it will go into production, which will have to be executed in three months, and there will be a final month for postproduction. Retrieved on February 20, 2018 from http://ecos.la/LA/10/5Sentidos/2016/12/19/10092/series-uy-una-plataforma-para-incentivar-la-produccion-nacional/.

[13] The directors have mentioned that 90 actors were involved and in some moments the extras reached 2 thousand.

[14] Alcuri, I. (Sept. 25, 2018). Hablamos con Pablo Stoll y Adrián Biniez. *La Diaria*. Retrieved on March 5, 2019 from https://ladiaria.com.uy/articulo/2018/9/hablamos-con-pablo-stoll-y-adrian-biniez-that-the-friday-premiere-all-behind-de-momo/.

Todos Detrás de Momo combined significant names of the national cinema, such as Pablo Stoll[15] and Adrián Biniez[16] in the direction. They were joined by Carlos Tanco in the screenplay, lyricist of *murgas* and creator of a very popular radio character with a witty and at times acid humor that is present in the series. The characteristics of its format are more adjusted to a miniseries than to a series: a story told in ten chapters and a narrative closure in the last chapter, with black background overprints that give an account of the future of the main characters. Also its filmmakers said that they did not think the narrative as open to future seasons: "If we had thought, we would have opened more narrative games", says Adrián Biniez. In any case, Stoll imagines, it would be possible to think of a prequel.[17]

The popular expression with which this fiction is titled places the carnival and its god, Momo, in the spotlight. Indeed, the carnival and specifically the world of Uruguayan *murga*[18] is the scenario where a police plot develops. Two different environments thus converge, opening up possibilities for very different characters.

The starting point is the murder of Hacha Nocetto, a member of the fictional *murga* La Emboscada. That is the first scene of the first chapter, which closes with the wake of El Hacha and the *murga*

[15] 25 *Watts*, a film that marked a milestone in the development of national cinema, *Whisky* and *Hiroshima*.

[16] *Gigante*, *5 de Talleres* and *Las Olas Gigante.*

[17] Alcuri, I. (Sept. 25, 2018). Hablamos con Pablo Stoll y Adrián Biniez. *La Diaria*. Retrieved on March 5, 2019 from https://ladiaria.com.uy/articulo/2018/9/hablamos-con-pablo-stoll-y-adrian-biniez-that-the-friday-premiere-all-behind-de-momo/.

[18] The Uruguayan *murga* is a theatrical and musical expression. It has its origins in the Spanish chirigota, particularly in a company from Cadiz that arrived in Uruguay at the beginning of the 20th century. When it ran out of money, it began to offer in the streets shows such as "La Gaditana que se va". Since then, the *murga* had in Montevideo its own evolution until becoming an original manifestation of deep popular roots. The performance in neighborhood stages (*tablados*) and in the Teatro de Verano are the main exhibition spaces of the *murgas*, but in recent years it has gained an strong presence in the media, especially on television. Made up of a director, singers and musicians who play cymbals, drum and snare drum, they have sophisticated their show to participate in the annual contest whose prize comes from public funds. Satire and political criticism have been a characteristic of *murga* since its origins (Alfaro, 2012, 2013).

singing around the coffin. A scene in which both worlds merge, the *murguero* and the police, and that seems a wink to *The Wire*.

However, this is not a police series of those in which the narrative tension revolves around the resolution of the crime (whodunit) and is closer to those that anchor in the relationship of a couple of cops (buddy movie). In this type of police series, the couple usually consists of two men, but in this case it is made up of a man and a woman, with contrasting physical characteristics and personalities.

Gabriela Silenci and Néstor Maidana are behind a drug trafficking network that uses pizza delivery for distribution. Néstor is ordered to infiltrate La Emboscada as part of another drug trafficking and money laundering investigation with international connections. Although the police plot is central to this fiction, the recreation of the *murga* world and the humorous look that crosses various situations and themes are equally relevant. The mission as an undercover agent leads Néstor to a reunion with his *murguero* past and the possibility of fulfilling his dream of singing in a *murga*. The Uruguayan *murga* is a manifestation deeply rooted in the popular culture of the country, and Néstor's dream of going out in a *murga* is that of many Uruguayans, almost as common as being a soccer player. The character will experience the tension between his role as a policeman and the fascination of singing in the *murga*. Guzzini's performance is full of gestural nuances that express this conflict.

One of the achievements of this fiction is precisely the recreation of the *murga* atmosphere and its characters, music and theatricality, the night rehearsals, traditions and legends that they converge in a beautiful tribute when three old *murgueros*[19] sing the 1969 withdrawal of the *murga* Araca la Cana (chapter 7). Music is the protagonist of this fiction, with excellent performance: both for the

[19] Carlos Nipoli, Miguel Ángel Cadenas and Jorge Corrente.

executions of the *murga* La Emboscada and for the choice of the theme of the presentation of the series.[20]

Although the *murga* refers to a local universe, the aesthetic and narrative approach is not an obstacle for a non-Uruguayan spectator. Moreover, it is the successful treatment of the local atmosphere that would allow the enjoyment by other audiences. It is possible to recognize certain traditional recreation, but that breaks with the insertion of an ironic and at times sarcastic humor. It is in the police plot that the series presents some weaknesses. It branches out into secondary scenes that sometimes weaken the rhythm and leaves loose ends that close in a hurry. The script seems to have been more attentive to the ironic look of characters and situations than to the typical tension of the police genre.

5. Theme of the year: television distribution models by the internet: actors, technologies, strategies

As Joshua Braun (2013: 128) points out, “online video distribution involves the coordination of many complex layers of human, commercial, regulatory and social activity, as well as technical”, so that “the route from the content to the consumer may seem particularly complex”. The purpose of the next pages is to identify these different layers and to understand the complexity of the distribution of internet television in Uruguay. For this, we will start from the recognition of the media system and the internet infrastructure in the country, in order to identify local and international actors as well as their relationships. We are facing an object of study in which opacity is part of its nature and, hence, of the difficulty of accessing accurate information and unraveling the invisible network of connections.

[20] *Bailar de Máscaras*, by Jorge Lazarof and Raúl Castro, outstanding personalities of Uruguayan music.

5.1. Field recognition (media ecology and web infrastructure)

The structuring of the Uruguayan media field has remained stable since the beginning of broadcasting, with the same main actors: those in charge of the two most listened radio stations in the country became the three beneficiaries of the licenses to operate broadcast television in the 1950s and 1960s (Schuliaquer, 2018: 25). The arrival of television for subscribers reproduces the same scheme: Saeta group is associated with cable company TCC; Teledoce with Nuevo Siglo; and Monte Carlo with Montecable. These companies have shared the market of broadcast and cable television in Montevideo and the interior of the country, and they hindered in different ways the access to new players to the market (Lanza and Busquet, 2010: 6). To this oligopoly, we add Antel, the public company that stands out as a monopoly actor in basic telephony and fixed internet, as well as having the largest share of the market in mobile telephony (Schuliaquer, 2018: 23). In this way, the Uruguayan media landscape has been defined by the preponderance of these two large blocks: the state, with Antel, which leads the technological infrastructure, and the private, which Lanza and Busquet (2010) call “the three big”.

5.1.1. Web infrastructure recognition

In the new media paradigm of digital platforms and internet, the architecture of this ecosystem is maintained, although new actors appear operating in the national scenario and, at the same time, it intensifies the opacity of the mediations between the audiovisual content and the consumer.

Brian Larkin (cited in Braun, 2013: 125) defines infrastructures as “the material forms that allow exchange in space” and institutions “that facilitate the flow of goods in a broader cultural and physical sense”. It is a structural power that, as Susan Star (cited in Braun 2013: 124) points out, “is inseparable from the relationship one has with it: for many people who go through a building, a flight of stairs is infrastructure, while for the person in wheelchairs it is an impediment". The recognition of the infrastructure that we propose here will try to make visible the framework on which internet TV operates in Uruguay.

The most important player in the infrastructure for internet access in Uruguay is Antel, the state-owned company, which usually appears in the official speech as a flagship of the country's technological modernization. With the laying of optical fibre[21], it allowed a broad coverage of high speed internet access, positioning Uruguay as a case that stands out in the region.[22] In 2014, the construction of a submarine cable system that connects Uruguay, Brazil and the United States enabled the company to become an international internet provider.[23] In the same year, the association of Antel and Netflix also took place to provide streaming service via optical fiber (Horta et al., 2015: 34-35). Finally, in 2016, Antel inaugurated a large International Data Center, with the ambition to be a regional data service provider.

In Uruguay there are only two companies that provide fixed internet broadband service: the state company Antel and the private company Dedicado. Antel provides broadband service by fiber or copper. To access the fixed internet, the user must have a fixed telephone line, which is provided by the monopolistic Antel. This determines that 99% of the country's services correspond to the state company (Ursec, 2018: 92). Dedicado, the private company that provides a fixed broadband service, with its own wireless technology via satellite antenna, concentrates 1% of all services (4,722 services throughout the country). However, the picture is a little more complex because several private companies sell the internet service provided by Antel: they are commercial intermediaries, but they do

[21] Currently, 69% of the transmission is by optical fiber. Ursec Report, 2018.
[22] According to the ITU (United Nations International Telecommunication Union) Report 2018, Uruguay is the country with the most affordable fixed and mobile broadband services in the region.
[23] This project is carried out in partnership with the companies Algar Telecom, Angola Cables and Google.

not offer their own infrastructure for the internet. In this category are the companies Netgate, Montevideo Com and TCC (a television company for subscribers that also offers Antel's internet).

The map of the infrastructure on which the internet television distribution operates in Uruguay is completed by cell phone companies that use LTE or 3G technology. The competition here is greater because private companies do not have the dependency link that prevails in fixed broadband, but Antel is also the leader in the market, with 54%, Telefónica Movistar ranks second, with 38%, and Claro follows with 8% (Ursec, 2018: 40).

5.2. Participants in the infrastructure of internet television distribution

In the conformation of the infrastructure for internet access, the state company is clearly the dominant actor: it is the basic structure on which other participants operate as well as other more or less visible layers in the distribution of internet television. We will now identify the web portals, the content distribution centers (CDN) and the digital intermediaries acting on internet television for the country. We will also try to distinguish national and international actors.

a) Internet portals

Internet portals	
National	**International**
Cable Play[24]	Netflix
TCC Vivo	Amazon Prime
NSNOW	HBO Go
MCGO Live	Crakle
Vera TV	Claro Video
ClickVeo!	Movistar Play
Canal M	Cablevisión Flow
Canal 10	DirecTV Play

[24] Cable Play and Uplay are platforms used by TV companies for subscribers in the interior of the country.

Teledoce	YouTube
Montecarlo	
TNU	
TV Ciudad	
Uplay	

Source: Obitel Uruguay.

In Uruguay, 11 national video streaming and on demand distribution portals were registered. Canal 10, Teledoce and Montecarlo are the web pages of the private broadcast television channels that offer some content to watch on demand, as well as the streaming of their live programming.[25] The portals of the two public channels offer live streaming and some contents of their own production.

MCGO Live, NSNOW and TCC Vivo are the portals of the cable companies (Montecarlo, Nuevo Siglo and TCC, each of them with commercial links to the three broadcast television channels). Access to the portals is possible through a subscription included in the provision of the television service for subscribers; it is a basic service that enables a certain number of titles that are included in the content library, among which series and movies are available. In addition, the subscriber can acquire other special services that enable him to use the international portals Crakle, HBO Max (which includes HBO Go) and Fox Premium. This is also the case of the foreign companies DirecTV, with DirecTV Play portal, and CableVisión, with Cablevisión Flow.

HBO Go arrives in Uruguay with an independent subscription in June 2017. Before that it was only possible to access through the purchase of "special packages" from the cable television companies, which is still the case with Crackle and Fox Premium. Amazon Prime Video arrived in the country in 2016 and currently allows

[25] Regarding the latter, there are different policies: Saeta, which previously offered this service for free and for all its live programming, in 2018 began charging $U10 per day plus VAT; Teledoce offers free streaming only for the national content; Montecarlo allows live streaming for all its content, including foreign fiction.

access to HBO content and other channels, such as Showtime, CBS and Cinemax, through a separate payment.

Claro Video and Movistar Play are the websites of Claro and Telefónica Movistar respectively. The subscription is included in the mobile telephone service offered by each company. YouTube keeps being free, however with a growing presence of advertising. The exclusive VoD consumption platform of the contents of YouTube Originals, YouTube Prime, is not available for Uruguay at the moment.

In the category of national portals, Vera TV is the only public portal since it is the platform developed by Antel.[26] Like cable operators, Vera TV offers a grid of digital live signals, with continuous programming, as well as VoD content. Within its platform, Antel has its own live signal, called Vera+, which transmits programming 24 hours a day, with its own internet domain (veramas.com.uy) and an application for the iOS and Android operating systems. At the same time, Vera TV offers streaming video links for specific live events (basketball, carnival, football and political events, among others) that are only available during their broadcast and that are usually offered within the live programming of Vera+.

b) Content distribution networks

According to the approach proposed by Lotz (cited in Baladron and Rivero, 2019: 135), the portals are not analyzed as new media but as new windows in the distribution and production of television content. The internet as a scenario makes this terrain more complex since specific technology support companies of software and infrastructure are incorporated into a universe of traditional mass media to which they were previously not linked. The research carried out for this chapter has highlighted the difficulties in identifying how this industry is composed, which are the intermediary companies,

[26] Vera TV. Términos y condiciones. Retrieved on March 10, 2019 from http://tv.vera.com.uy/terminos_condiciones.

what services they provide and how those services are. The poor regulation of the internet as a means of communication[27] contributes to the fact that the search for this information is difficult and in general very opaque; there are no official records of these companies or their benefits.

As mentioned in the diverse bibliography on the theme, this is not a distinctive feature of the Uruguayan case. Braun (2013: 124), when analyzing the processes of online video distribution, describes them as underlying infrastructures that support the connected visualization company and that until now remain invisible to the public. They are defined as "transparent intermediaries", which make up an invisible infrastructure, but crucially important in the industry since it directly impacts the possibilities of production, distribution and therefore content consumption.

In this context, it has been difficult to precisely identify who are the intermediaries responsible for the CDN in the national or international portals that are present in Uruguay. However, the US company Datanyze[28], leader in the technographic data service in America, offers a list of at least 25 companies that provide the CDN service for Uruguay, all foreign. In that list Amazon Cloud Front appears as the dominant of the Uruguayan market, with 289 domains, 30% of the market share. It is followed by Cloudflare CDN, with 276 domains (28%), jsDelivr, with 201 domains (21%), and Akamai, with 44 domains (4%).

It is not possible to identify which of these domains are portals for the distribution of videos on demand and streaming operating in Uruguay or if they are dedicated to something else. The exception is Amazon Cloud Front, which has a media and entertainment

[27] Specifically in the Uruguayan case, a controversial Media Law began to be implemented. In its first article, it establishes that "telecommunications networks and services that use the internet protocol network as a platform" are not subject to regulation of the law (Law 19,307, art.1).

[28] Datanyze ZoomInfo Company. Retrieved on March 5, 2019 from https://www.datanyze.com/market-share/cdn/Uruguay/.

category in which it appears as a provider of these services also for Amazon Prime Video and Spotify.

At the national level, the identified CDN is Antel International Data Center, but except for the service it provides to Click Veo! there has not been access to documented and detailed information about its activity. Some qualified sources told us that the servers that use the platforms of MCGO Live, NSNOW and TCC Vivo are hosted there.

c) Digital distribution intermediaries

Those companies that we call digital intermediaries in distribution are part of the network of activities underlying VoD consumption. These are companies specialized in data analysis, which process the large amount of information generated by the portals and provide them with the service of algorithms, advertising, geofencing, geotargeting, among others. They are industries specialized in software of various kinds that constitute a sector in which the difficulties mentioned above in terms of the opacity of the links between the companies are maintained. The growing globalization of the ICT industries sector makes it difficult to identify these corporations and their clients.

The Uruguayan Chamber of Technology (Cuti) offers a list of 13 companies in the development of software and data analysis that provide their services for the area of telecommunications and entertainment. These include: Bold Media Solutions Support (which we have been able to identify as one of the most active companies linked to streaming and on demand), Addvantages, Adagio, Atos, Command Line, Conatel, Crea Soft, Handsoft, Web Hosting, Houlak, Ici Telco, InSwitch, Inco and Indra.[29]

There are also national companies, such as Idatha, that are exclusively dedicated to data analysis, digital marketing analytics and

[29] Uruguayan Chamber of Information Technology (Cuti). Retrieved on March 5, 2019 from http://www.cuti.org.uy/socios.

audience insight.[30] Other companies, such as Global News Group based in Uruguay, are dedicated to monitoring and analyzing media, but combine it with digital marketing so that companies can place their brand based on what is in vogue in the virtual world. Google, HBO and Netflix are clients of this company in its foreign subsidiary, and Cablevisión in the national headquarters.

5.3. Industry structure and its composition from the political economy

The following table aims to identify the main corporations and their place in the economy of the system.

Name of the corporation/ headquarters	Economic sector*	Participation modality in the network infrastructure**	Level of dominance in the market	Public/private Nationality
Antel	Telecommunications	Owner of the internet infrastructure through optical fiber	First internet service provider and responsible for infrastructure	Public
Saeta, Teledoce, Montecarlo, Montecable, Nuevo Siglo, TCC	Mass media/ telecommunications	Web portal/ TV and TV for subscribers	50% of subscribers of cable TV	Private National
Netflix	Silicon Valley	Web portal	First exclusive distributor of VoD by subscription	Private International USA
YouTube	Silicon Valley	Web portal	First distributor of VoD without subscription	Private International USA
DirecTV	Mass media/ telecommunications	Web portal / cable TV	Second in number of distribution services for subscribers	Private International USA
Cablevisión	Mass media/ telecommunications	Web portal/ cable TV	Third in number of distribution services for subscribers	Private International Argentina

[30] Idatha. Retrieved on March 3, 2019 from: http://www.idatha.com/audience-insight.html.

Movistar Telefónica, Claro	Telecommunications	Web portal	Second in mobile phone services	Private International
HBO Go	Silicon Valley	Web portal	Recent availability. Minor presence in the market	Private International USA
Amazon Prime	Silicon Valley	Web portal	Recent availability. Minor presence in the market	Private International USA

* Industrial sectors: 1) mass media; 2) telecommunications; 3) Silicon Valley (corporations of digital platforms, corporations and information services and automation).

** Network infrastructure: 1) internet portals; 2) internet service providers; 3) content distribution networks; 4) digital intermediaries.

The industrial and economic sectors that make up the system could be separated into three large groups: on the one hand, there are the mass media, constituted by the three national private companies (Saeta, Montecable and Teledoce), which have traditionally dominated the sector and have moved together; on the other hand, the telecommunications group, led by Antel, the state company; finally, the third group, covering information services, technology and platforms, which we will call Silicon Valley, consists mainly of Netflix, which has maintained a steady growth since entering the Uruguayan market.[31]

When considering all these players, the one with a key dominance is Antel, as internet access is practically on its hands: it concentrates 99% of fixed internet services and is the main provider of mobile telephony and the corresponding internet. In other words, access to internet television in Uruguay depends largely on this entity.

The current Uruguayan media landscape that the last table tries to show is presented as a picture that is still in motion, with new

[31] We could include ClickVeo! in this sector because of its nature as a company developed by individuals independently of the mainstream media, but its association with Antel dilutes its autonomy.

services and associations in its national portals, in addition to the international ones that continue to enter since the arrival of Netflix. In short, some visible actors and other transparent actors are being reconfigured in a local scenario, where, on the one hand, the weight of historical conglomerates seems to be maintained and, on the other hand, dependence on international flows becomes more acute.

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Top ten tv fiction in Obitel countries

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OBITEL 2019

Television Distribution Models by the Internet: Actors, Technologies, Strategies

The current Obitel Yearbook is the 13th volume of a series started in 2007. Since then, the Obitel established itself, in the communication studies field, as an international research network about television fiction in the Ibero-American region. Based on a monitoring methodology, its aim is to raise quantitative and qualitative data about the various national television narratives produced and displayed in the region, as well as to identify, through comparative analysis, similarities, specificities, appropriations and adaptations among these narratives. The result of this work is an intercultural study that allows to identify and interpret the representations these countries make of themselves and of others through fictional television productions and by which they build and rebuild daily elements of their cultural identity.

Obitel is made up of ten national research groups that perform annual systematic monitoring of fiction programs produced and issued by open television channels in their respective countries. It is worth noting the existence, for 14 years, of a unified methodological protocol, which includes procedures and techniques that undergo constant improvement. The result of this work is aimed at communication researchers, students and professionals in the form of a synchronic and diachronic overview of the transformations that fiction genres and formats have been coming through in the Ibero-American television industry.

For this yearbook, the theme of the year elected by the Obitel countries was "television distribution models by the internet: actors, technologies, strategies", which provides some of the main elements to be considered when mapping actors and their modalities of participation in the new networks of routes and windows of content offer, in the different internet television markets that make up the universe of the Obitel countries. The recognition and reflections proposed here about the distribution space are based on two complementary approaches that, in general terms, are projected from the following fields: the first is the study on media infrastructure and cultural life of material supports; and the second is a combined view of an industrial perspective and the political economy of the media.

Editora Sulina