

IBERO-AMERICAN OBSERVATORY OF TELEVISION FICTION

OBITEL 2016

(Re)Invention of TV Fiction Genres and Formats

general coordinators **Maria Immacolata Vassallo de Lopes**
Guillermo Orozco Gómez

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Maria Immacolata Vassallo de Lopes



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PRESENTATION

This Yearbook is a result of a partnership started in 2008 between Globo and the Ibero-American Observatory of Television Fiction (Obitel), which includes editing publications and organizing seminars. The Observatory, which this year, honored, publishes its **tenth yearbook**, aims to monitor and analyze the production, audience and sociocultural impact of TV fiction in Latin America and in 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*

About Globo:

Besides publications, Globo supports researches and promotes courses and seminars in partnership with Brazilian and foreign in-

stitutions about themes considered relevant for society in the communication, arts, management, technology and citizenship areas.

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EDITORS' NOTE

This *Obitel Yearbook 2016* is published by Globo/Editora Sulina (Brazil) in three languages: Portuguese (in printed and digital form), Spanish and English (in digital form).

The previous *Obitel Yearbooks* are:

- *Obitel Yearbook 2007*, published in Spanish by Editorial Gedisa, Spain.
- *Obitel Yearbook 2008*, published in Portuguese and English by Globo Universidade, under the seal of Editora Globo, Brazil.
- *Obitel Yearbook 2009*, published in Spanish by the European Children's Television Observatory (Oeti) and in Portuguese and English by Globo Universidade/Editora Globo, Brazil.
- *Obitel Yearbook 2010*, published in Portuguese and Spanish by Globo Universidade/Editora Globo, Brazil.
- *Obitel Yearbook 2011*, published in Portuguese, Spanish (in printed and digital form) and English (in digital form) by Globo Universidade/Editora Globo, Brazil.
- *Obitel Yearbook 2012*, *Obitel Yearbook 2013*, *Obitel Yearbook 2014* and *Obitel Yearbook 2015*, published in Portuguese (in printed and digital form), Spanish and English (in digital form) by Globo/Editora Sulina, Brazil.

In 2016, *Obitel* is pleased to celebrate its 11th year of existence and its **tenth yearbook**. Since its inception, in 2005, in Bogotá, *Obitel* elected the centrality of television fiction production in Ibero-America due to the growing interest of different countries in conflating policies of production, of exchange and commerce and of media, cultural, artistic creation, which could cooperate to constitute a major geopolitical and cultural zone. Based on this scenario, *Obitel* performs not only the quantitative record of TV fiction production in the 12 countries but also the analysis of programming

trends, broadcast television reception and, since 2010, transmedia reception.

Throughout these 11 years of existence, Obitel has consolidated in the field of Ibero-American communication studies as an international research network that has been producing quantitative and qualitative analyses whose main objective is to identify, through comparative studies, both the similarities and differences, the adaptations and appropriations among the national television narratives produced and exhibited in the region. It is, therefore, an **intercultural project** that allows to identify and interpret the representations that these countries make of themselves and of others in the television narratives, through which people build and rebuild their cultural identity. These approaches facilitate the Observatory building, at the same time, a comprehensive overview about the cultural and economic strength that fiction has gained in the Ibero-American television and in the life of these countries.

On the other hand, it is necessary to note the construction and improvement, over these 11 years, of a **unified methodological protocol** adopted by all Obitel research teams. This protocol integrates mixed techniques of observation and data collection as well as procedure and patterns of quantitative and qualitative analysis. All this work is to provide the researchers and practitioners of communication with both synchronic and diachronic view of the complex transformations that have affected television industries in the Ibero-American context.

The main result of all these continuous and coordinated efforts has been the **historical series of data**, which is rarely achieved in the field of social research. Another equally important result of Obitel has been the **collaboration between the university and the productive sector**, a relationship that is renewed every year, demonstrating that, if desired, the alliance of interests around the study of our main TV product – the *telenovela* – is possible.

For all this, throughout the 11 years of Obitel, the general coordinators, the national coordinators and all research teams reaffirm

their commitment with the development of knowledge on television fiction, with the qualified formation of its researchers and professionals as well as with the application and intervention of this knowledge in the promotion of TV fiction that increasingly speaks as the narrative of the Ibero-American nations.

General and national coordinators of Obitel once again wish to express our appreciation to Globo for its continued support over these years and its decisive involvement in this publication and the realization of our annual seminar. We also reiterate our appreciation for the cooperation received from Kantar Ibope Media (Argentina, Brazil, Chile, Colombia, Ecuador, Peru, Uruguay), Nielsen Ibope México (Mexico), CAEM, GfK, Marktest (Portugal), Barlovento Comunicación/Kantar Media (Spain), Nielsen Media Research (United States) and AGB Nielsen Media Research (Venezuela). Finally, our deepest gratitude for the support and cooperation received from all universities and research centers of the countries members of Obitel.

NOTE ON METHODOLOGY

The IBERO-AMERICAN OBSERVATORY OF TELEVISION FICTION, constituted as Obitel since its foundation, in 2005, works as an intercontinental project for the Ibero-American space, including Latin American and Iberian countries, besides the United States Hispanic population. As at the time, we consider important to speak of the Ibero-American context due to the growing interest of different national states in conflating policies of production, of exchange and commerce, and of media, cultural and artistic creation, which could cooperate to constitute a major geopolitical and cultural zone.

The studies that have been carried out by Obitel comprise at least five dimensions of the television fiction as its vast object of analysis: production, exhibition, distribution, consumption and thematic content. To these dimensions has been added, since 2010, the phenomenon of “transmediation”, which, while emerging, carries a high potential for understanding the TV production and the expectations, distribution and consumption of TV fiction. With this analysis, we intend to explain the new forms in which the audiences relate with the television fiction now watched and consumed on the internet or on mobile devices, such as smartphones, laptops, tablets, etc.

The methodological work for this Obitel Yearbook 2016 has been mainly:

- 1) **Systematic annual monitoring** of the fiction shows that were broadcast in the year 2015 by the open channels in the 12 Obitel countries.

- 2) Generation of **comparable quantitative data** from these countries: rating and share, premiere shows, number of hours, titles and chapters, audience profiles and the central fiction themes, besides the on-line activities of producers and users of TV fiction.

3) Identification of plural and bilateral flows of fiction genres and formats, translated in the **ten most watched productions**, its central themes, rating and share.

4) Analysis of trends in the **audiovisual context** of each country: data of consumption of other media and other program genres, advertising investments, the most significant legal and political events as well as what each national research team considers the **highlights of the year**, especially regarding to changes in production, narratives aesthetics and thematic contents.

5) The analysis of **transmedia reception** and the interactions of the audiences with fiction in every country; case studies considering the TV shows that, due to its singularity, have had great repercussion on the internet or on social networks.

6) The proposal for a study theme that takes the 12 teams to a theoretical and methodological integration around it. The result is intended to be a unique contribution of *Obitel* to television fiction studies, under the title of **theme of the year**.

7) The publication of the results of the systematic monitoring in yearbook format, with special attention to the theme of the year, which, for the *Obitel* Yearbook 2016, is the **(re)invention of TV fiction genres and formats**.

Our monitoring was carried out by a network of research teams from 12 countries and different universities from the Ibero-American region: Argentina, Brazil, Chile, Colombia, Ecuador, Spain, United States, Mexico, Peru, Portugal, Venezuela and Uruguay.

The main sources of audience data have been granted in the different countries by: Kantar Ibope Media (Brazil, Argentina, Chile, Colombia, Ecuador, Peru, Uruguay), Nielsen Ibope México (Mexico), CMEA, GfK, Marktest (Portugal), Barlovento Comunicación/ Kantar Media (Spain), Nielsen Media Research (United States) and AGB Nielsen Media Research (Venezuela).

The work is also done with the data generated by the proper research teams from other sources, such as press releases and websites information (clippings), audio and video materials as well as

those derived from direct contacts with agencies and agents of the audiovisual media in each country.

The data statistical treatment was carried out according to *productive typologies* (programming grids, time slots, length of each fiction, chapters or episodes) and *measuring typologies* (audience ratings and share). It makes possible the creation of comparative tables on the offer conditions and the production profiles of television fiction in each country, including such categories as: programs data, formats, producers, scriptwriters, creators and exhibition strategies.

The structure of this Yearbook is divided into three parts.

The first is the chapter of **comparative synthesis of fiction in the Obitel countries**. This comparison is made from a quantitative and qualitative point of view that makes possible to observe the development of fiction in each country, highlighting their main productions as well as the theme of the year.

The second part consists in **12 chapters** (one for each country), with an internal structure of fixed topics, but with new additions every year. The sections that compound each chapter are the following:

1) **The country's audiovisual context**: this section presents general information about the audiovisual sector regarding television fiction production: history, trends and the most relevant events.

2) **Analysis of premiere fictions**: it is presented through quantitative tables that show specific data about national and Ibero-American TV fictions that were released in each country. In this section, the **ten most watched titles in the year** are highlighted.

3) **Transmedia reception**: this section presents and exemplifies what channels offer to the audience on the internet and mainly the audiences' behaviors when watching, consuming and interacting with their fictions through websites, blogs, forums, generating the so-called on-line fandom.

4) **Highlights of the year**: the most important productions not only in terms of audience but also for their sociocultural impact and

for generating innovation in the television fiction production or reception.

5) **Theme of the year**, which this year is the **(re)invention of TV fiction genres and formats**. The purpose of this analysis was to work with the changes perceived in fictional narratives, according to the particularities of each country and comparing them in their evolutive diversity in Ibero-America. Television fiction has been transformed both in its content, with the combination of various genres (drama, comedy, thriller, adventure, romance, etc.), as in its seriality and formats. The current transmedia environment contributes to the production strategies to innovate and keep pace with new television consumption habits.

The analyses are based on a historical perspective of the genres in their narrative transformations and what has been their evolution, particularly in relation to television fiction production. They also reveal the increasing presence of complex narratives and the use of new interactive technologies. The enthusiasm for this new era of television content is manifested in the production sphere, in the audience, in the press and in academic studies that, together, each in its own way, seem to announce a “new golden age of television”.

The third part is an **appendix** that brings **the technical specifications of the ten most watched fiction titles** in each country, with the basic information about these productions.

FIRST PART

FICTION IN THE IBERO-AMERICAN SPACE IN 2015

COMPARATIVE SYNTHESIS OF OBITEL COUNTRIES IN 2015

Maria Immacolata Vassallo de Lopes
Guillermo Orozco Gómez

This first part of the Obitel Yearbook presents a comparative synthesis of the main data from the monitoring performed in 2015 about production, circulation and reception of premiere TV fiction broadcasted in Ibero-American countries. These data were achieved during the whole year by all Obitel network researchers.

The monitoring covered programs of 77 open television channels – 53 private channels and 24 public channels – with national coverage in the 12 countries making up the Obitel geo-cultural scope.

Table 1. Obitel countries and channels analyzed in 2015

Obitel countries	Private channels	Public channels	Total stations
Argentina	América 2, Canal 9, Telefe, El Trece	Televisión Pública	5
Brazil	Globo, Record, SBT, Band, Rede TV!	TV Brasil	6
Chile	UCV, Canal 13, Telecanal, La Red, Chilevisión, Mega	TVN	7
Colombia	RCN, Caracol, Canal Uno	Señal Colombia, Canal Institucional	5
Ecuador	Teleamazonas, RTS, Ecuavisa, Canal Uno	ECTV, Gama TV, TC Televisión	7
Spain	Antena3, Cuatro, Tele5, LaSexta	La1, La2	6¹

¹ Spain has 24 autonomous channels not analyzed in this comparative chapter, which includes only national reach stations of each country. The most significant aspects of these regional or local channels can be found in the chapter about Spain in this Yearbook.

United States	Azteca America, Estrella TV, MundoMax, Telemundo, UniMás, Univision, Vme	-	7
Mexico	Televisa, TV Azteca	Once TV, Conaculta	4
Peru	Frecuencia Latina, América Televisión, Panamericana Televisión, ATV, Red TV	TV Perú	6
Portugal	SIC, TVI	RTP1, RTP2	4
Uruguay	Montecarlo TV, Saeta, Teledoce	Televisión Nacional (TNU), Tevé Ciudad	5
Venezuela	Canal I, Globovisión, Meridiano, Televen, TV Familia, TVepaco, Vale TV, Venevisión	ANTV, TVes, TeleSur, VTV, Vive TV, Colom-beia, TV FANB	15
Total	53	24	77

Source: Obitel

In the universe of 77 open television channels of Obitel countries, there is a huge prevalence of private channels (70%) over public ones (30%). This ratio has been maintained over the years of our monitoring. **Portugal** stands out as the only country with an equal amount of private and public channels. On the other hand, in the **United States** there is no public channel in Spanish language. In 2015, the number of television channels has remained the same it was in 2014, noting that, in **Mexico**, Cadena Tres stopped broadcasting to make way for a new television network that will start at the end of 2016; and that, in **Uruguay**, TV Ciudad, a new digital public channel, began operating.

1. Audiovisual context in Obitel countries

The year 2015 boasted countless technological, narrative and programmatic changes in the fiction industry in the Obitel scope. The large number of transformations at all levels resulted from the fact that media corporations have undergone structural changes by expanding their reach to new markets. This has led them to home their strategies in the digital field, even though this occurred amidst the crisis caused by a drop in television ratings in most of the countries that are part of this study.

Audience panorama

Every technological change in turn entails changes in the dynamics and consumption habits among the viewers. Some changes are being structured by the market dynamics driven by the telecommunications, computer and entertainment industries, but others are being structured by the audiences/users themselves, who, in their process of migration, are establishing new forms of interaction and interactivity with fiction.

In 2015, most of the Obitel countries reflect these changes; for example, in **Brazil**, the audiovisual panorama was marked by the reorganization of the viewers' habits and the producers' permanent addiction to the possibilities of expansion of digital contents, especially those connected with television on demand. This latter aspect underscores the growth of the taste for and consumption of Netflix among Brazilian audiences; that is why the TV stations themselves have had to create applications such as Globo Play (launched in 2015), TV SBT, Now and Vivo Play, evidencing that in **Brazil** multiscreen reception is ever more frequent.

Something similar happens in **Portugal**, where, in spite of the failure of Digital Terrestrial Television (DTT), a multiscreen reception strategy promoted by public television put at the disposal of Portuguese audiences all the TV and radio programming of the Portuguese Radio and Television system (RTP).

Instead, **Spain** reflected a drop in terms of consumption through DTT (80.6%) and digital satellite (3.3%), respectively 1.4 and 0.3 points, while IPTV reception (5.4%) experienced an increase of 1.6.

The loyalty of Ibero-American audiences with TV fiction with and through the technological changes has remained strong in all the Obitel member countries. A relevant example is that of **Venezuela**, a country that is undergoing one of the worst economic and social crises of its history and yet it registered a very close connection with its viewers with *telenovelas* such as *Amor Secreto* (Venevisión), which was spliced with the electoral campaign.

The same political-electoral change was also lived in **Argentina** with the presidential elections. The audiovisual space was dominated by political information spaces and debate shows, which displaced part of the premiere fiction spaces (from 20% to 11% of the programming).

Another relevant aspect of the audience panorama in 2015 is connected with the fall of TV rating, which does not mean a distancing from TV materials, but from the TV set as the main link between the viewers and TV contents. In the **USA** and **Mexico**, for example, this can be explained by the market and business plan that TV networks such as Univision and Televisa are implementing to expand their domain in other markets. This has caused Televisa to leave behind its traditional business to yield the way to a new era in the telecommunications sector.

The **United States**, through Telemundo, in order to tackle the detachment of young audiences from their screens, began with a strategy for releasing a format known as “super series”, a mixture of *telenovela* and series, at prime time. Some of these series have caused a stir due to their subject matters that mix romantic stories with the life of several drug traffic capos.

The same tendency was observed in **Ecuador**, but, instead of super series, the connection with the audiences was generated by means of the “boom of Turkish *telenovelas*”, which have penetrated the entire Obitel scope in the last two years. The same phenomenon dominated TV screens in **Uruguay** and **Peru**, where these Turkish fictions ranked among the most viewed, displacing Brazil and Mexico from the top ten. We are going to come back to Turkish *telenovelas* later in this comparative analysis.

In **Colombia**, the strategy was not directed toward the foreign but rather through local elements, since many of the fictions dealt with the construction of narratives that rescue the life and history of Colombian events or characters. This implied a focus not anymore on the style of the narconovelas, but on the folklore, as it could be observed in *Diomedes, el Cacique de la Junta*, which tells the life

of Diomedes Díaz, one of the most famous singers in Colombian popular music.

Advertising investments of the year: in TV and in fiction

As we had already mentioned, the restructuring of TV companies and their plan for expansion into the telecommunications market – along with technological migration of their viewers – have reflected in the drop in advertising sales in open television, which does not necessarily indicate a crisis; quite the contrary, there are rumors of a reconfiguration of advertising now in multiscreen or 360-degree strategies.

Countries such as **Mexico, USA, Ecuador, Colombia, Peru** and **Venezuela** had significant reductions in their advertising investments. In the case of **Mexico**, this change did not translate into global losses for its main company, Televisa, since in 2015 it obtained a positive balance in its incomes, which are now diversified in the telecommunications sector. The same happened in the **United States** with Univision.

In **Ecuador**, according to data provided by Kantar Ibope Media, although Ecuavisa dominates the rating and the top ten of TV fiction, this channel falls from the second to the fourth place in terms of advertising intake (17.1%); it is Gama TV, a channel that was confiscated by the government, which registers the largest advertising investment in 2015 (22.2%).

In **Colombia**, the reduction in advertising investment is due to the decisive political climate given by the context of the peace talks and mainly because of the devaluation of the peso relative to the dollar and its economic cost. The same situation is occurring in **Venezuela**, where there was a significant reduction in advertising following the economic crisis.

Peru, according to Kantar Ibope Media data, experienced a dramatic fall in 2015 in television in terms of participation, the lowest in the last four years. Still, with 64.9% of participation (14 points less than in 2014), it is by far the medium that concentrates the largest advertising investment.

In the case of **Uruguay**, advertising investment experienced a decline in 2015 from 334 million dollars in 2014 to 254 million in 2015. This reduction can be explained by the restriction policies in the public companies, the shrinking of the private sector and a slowing down of consumption.

On the other side of the coin, **Argentina, Brazil, Spain** and **Portugal** were among the few countries that showed a spike in their advertising investment. **Argentina**, for example, increased its advertising investment in fiction in 40.5% in respect of the previous year. **Spain** went down the same road: it had a 6.4% growth and obtained profits of 1.4 billion euros. **Brazil**, despite the economic crisis, obtained advertising investment in 2015 of 132 billion reais, which meant a 9% growth in respect of 2014. Finally, in **Portugal**, the increase amounted to 3.5%.

Merchandising and social merchandising

The new multiscreen or 360-degree advertising strategies were also evidenced in the introduction of products within the plots and scenarios of the Ibero-American fiction, so strategies such as merchandising and social merchandising continue to be in effect.

Brazil continues to have a strong presence in the use of merchandising (product placement) in fiction. In the last episodes of *telenovela Império* (Globo), a soft drink had a label with the name of a central character and this had a significant weight in the plot. In fictions such as *A Regra do Jogo* (Globo), a bank campaign was also introduced intermingled with the plot.

These advertising strategies, also known as product placement and soft sponsoring, were present in **Portugal, Spain, Colombia** and **Argentina** as well.

In the case of **Portugal's** fiction industry, there was innovation in the way in which brands and tendencies were introduced in the plots of the *telenovelas* and series targeting a teenage population. **Colombia** and **Argentina**, however, managed to expand this com-

mercial strategy to platforms and applications by means of VoD and streaming systems.

Similarly, **Spain** has expanded its merchandising after the creation of books and games originated from successful fictions. The absence of commercial advertising in TVE shows has turned public television into one of the most active companies in the exploitation of this type of resources. This was accomplished via initiatives such as the game *Águila Roja*, available for computers, smartphones and tablets; the *telenovela* *Carlos, Rey Emperador*, inspired in the monarch's life; and the contest about Spanish families on the page *Cuéntame Cómo Pasó*, which rewards the best photos sent by the users with a book.

As to social merchandising, 2015 was characterized by being an active year in the inclusion of pro-social messages in *telenovelas* and series. The most frequent subjects are equality and gender violence, racial discrimination, migration, obesity and bullying.

Portugal, like in 2014, continued with stories whose center was racial discrimination, an issue that was approached in *telenovelas* such as *A Única Mulher* and *Coração d'Ouro*. Domestic violence inflicted on women was also dealt with in productions such as *Mulheres* (TVI), *Mar Salgado* and *Coração d'Ouro* (SIC).

Brazil presented several socioeducational topics in the field of social merchandising, especially about gender identity, homoaffec-tive relations and homophobia, which were discussed in *Império*, *Babilônia* and *O Canto da Sereia*. Other productions such as *Alto Astral* dealt with obesity, while *A Regra do Jogo* approached violence against women. Religious topics were also present in *Os Dez Mandamentos* and *Milagres de Jesus*.

In the **United States**, the elections for presidential candidates were propitious for several campaigns for the empowerment of the Latin community to be promoted from the Hispanic TV networks in view of the presidential election to take place in 2016.

In **Colombia** and **Venezuela**, their respective social contexts influenced on the type of social issues incorporated into fiction. The

peace negotiation process in **Colombia**, for example, caused “La Caminata de la Solidaridad” (The Solidarity Walk) to be summoned from series and *telenovelas*. In **Venezuela**, the social economic crisis promoted campaigns entitled “Somos lo que queremos” (We are what we want).

With essentially technological themes, **Mexico** and **Uruguay** performed atypical social merchandising. **Mexico**, in view of the imminent need for the “analog blackout”, incorporated the need to buy digital TV sets or decoder boxes within the plot of several *telenovelas*, both by Televisa and TV Azteca, so that they would not miss their favorite *telenovelas* or shows. The blackout took place on December 31st, 2015.

In **Uruguay**, in one of the national productions aired in 2015, *Paleodetectives*, there were references to an XO computer, which is a technology that has been introduced in basic education as a stimulus for children’s learning.

Ecuador, Chile and **Peru**, as in previous years, did not present any merchandising actions or strategies in any of the TV fiction productions released this year.

Communication policies

The recent communication and telecommunication policies that have been implemented in the Obitel member countries since 2013 had a significant development and application this year.

In **Brazil**, the Internet Civil Framework Act entered a second phase, which included a referendum for its regulations. This project goes hand in hand with the analog blackout, programmed to start in February 2016 and finish in 2023, and with the opinion poll issued by the Ministry of Communications about the new telecommunications model that favors broadband to the detriment of landline telephony. At present, this service is mainly private, but it is desired for it to allow access to a large portion of the population that has not had access because of **Brazil’s** continental dimensions.

The most important reform in terms of communication policies in the **United States** happened in February 2015 around the so-called “net neutrality”. In this situation, the telecommunications commission supported the proposal by the White House of considering the internet as a utility, which would prevent internet providers from establishing different service packages in which fast internet would cost more than low-speed internet. On the other hand, telecom companies (internet service providers) see the measure as an obstacle for what they consider demand and supply.

In 2015, **Mexico** experienced the implementation of its new set of regulations on telecommunications and broadcasting. The current Mexican government bet on the telecommunications market as one of its key sectors for investment and the country’s development. According to the Federal Telecommunications Institute, the country increased its investment in telecommunications in 22% due to the 9 billion dollars injected by AT&T and América Móvil in the sector.

In 2015, Ecuador was amidst the application of the Organic Law of Communication and its regulations; however, these modifications remain in suspense because said regulations were amended in December 2015 by intervention of Article 384, where a paragraph was added at the beginning: “communication as a public service will be provided by public, private and community means”. Thus, it is established that communication is a public service, that is, competence of the State. However, the Constitution also establishes that communication is a right, that is, the citizens’ competence. The uncertainty as to what definition will prevail and under what circumstances remains and it generates tensions between the State and the citizenry in the fields of communication and media.

In **Colombia**, communication policies debated on the definitive expansion of 4G mobile telephony, the implementation of greater coverage for Digital Terrestrial Television, the development of Plan Vive Digital and the presence of new actors, such as Netflix, in content transmission.

In **Portugal** the extinction of the Cabinet for Social Communication Media, a government body that has operated the concession, execution and validation of social communication public policies since 2007, marked the changes in the country's telecommunication policies. Side by side, Bill n. 78/2015 was promulgated to regulate the promotion of transparency in the direction, management and financing of the bodies in charge of performing social communication activities.

In late 2014, **Uruguay** passed the Law on Audiovisual Communication Services. Its regulation would be in the hands of the new government that took office in March 2015. The passing of this law triggered a series of contestations at the Judicial Power: out of the 202 articles that make up the law, appeals were lodged regarding the unconstitutionality of 131. In view of this situation, the new president, Tabaré Vázquez, decided to postpone implementation of the law until the Supreme Court of Justice has made a decision in respect of these appeals of unconstitutionality. This decision caused for the year 2015 to elapse without the act being applied. The SCJ made a decision in April 2016 and declared several articles of the law unconstitutional.

Spain also lived a similar legal process, since six days before the Supreme Court announced the possible closing down of eight Digital Terrestrial Television (DTT) signals in June, which would have added to the other nine closed in 2014, Infraestructuras y Gestión 2002 withdrew their charges after reaching an economic agreement with the affected communication groups. In September, the government solved the restructuring of the DTT frequency distribution by awarding six new channels by tender, which were obliged to start airing before April 2016.

In **Venezuela**, media content censorship continued and some *telenovelas* underwent modifications, editions and abrupt transitions in their contents to adapt them to the stipulations of LRSRTV-ME (2011). This affected the narrative lines of the stories, such as it happened with *telenovela Avenida Brasil*. In addition, the Supreme

Court of Justice, the highest court of law in the country, declared the sentence by the Inter-American Court of Human Rights not executable and ordered the immediate reestablishment of Radio Caracas Televisión (RCTV) signal.

The change of government in **Argentina** also brought about changes in their media and telecommunication policies. Shortly after his administration started, president Macri dictated a series of Necessary and Urgent Decrees that modified substantially the rules that regulate the communications sector. The in-depth modifications were executed by means of Decree 267/2015, which created the National Communications Body. The decree modifies key articles since, among other novelties: it broadens the limits for license concentration and expands its exploitation terms; it facilitates license transference among companies and authorizes the entrance of audiovisual companies into the telecommunications sector. In addition, the same Decree redefines the pay TV service as an ICT service, which places it outside the scope of the Audiovisual Communication Services Act, leaving null and void obligations such as signal must-carry.

In terms of legislation on media and telecommunications, **Peru** was the only country that did not present any changes.

Information and Communication Technology (ICT) trends

Technological migration and techno-media practices of the new generations (millennials) have upset the technological tendencies and their relation with television. The closeness of these generations, in most Obitel member countries, is causing the audiences to distance themselves from television, but not from television materials, since the television on demand systems have grown in Ibero-America, with a predominance of Netflix and ClaroVideo.

In 2015 **Brazil** had been connected to the internet for 20 years. This country has 95.4 million people accessing the net and this means that one in every three Brazilian households has internet access. This, of course, has had an impact on audiovisual product

consumption from mobile devices and technological platforms such as television on demand, which has modified the content reception habits among Brazilian audiences not only in terms of viewing but also in terms of production, since the number of contents produced by users on YouTube has grown.

In the **United States**, for example, *Forbes* magazine explained how the new consumption dynamics by the millennials are putting an end to the wire. The millennials make up the sector of the population that is causing a disconnection with the wire because they consume 54% of the television contents from secondary screens. Besides, most millennials search for information online, between 41% and 51% of them text and 48% use the social networks – all of these activities are carried out while they watch television. It means, according to the report, that 86% of them are doing something else while they are watching television (Hughes, 2015).

Ecuador also shows progress in telecommunications. The Telecommunications Regulation and Control Agency indicated the presence of 27 licensed Digital Terrestrial Television stations in the private sector and five in the public one. The number of users that use landline internet service is 11 million, representing 67.74% of the population, and there are 5 million mobile internet users, accounting for 34.97%. These figures indicate that internet penetration in spaces such as households is greater than the number of mobile users.

Colombia has promoted the expansion of digitalization and the use of internet as well as multiple services the web offers, including VoD, OTT and streaming systems, whose use is growing among the different national media. In this sense, the nation reached in mid-2015 a total of more than 50 million users of mobile technology and an ever stronger presence of public Wi-Fi systems.

A similar phenomenon occurred in **Chile**, where the trends that had manifested in the two previous years consolidated. Thus, the offer of video on demand, especially in the streaming service platform Netflix, whose subscription increased almost two dollars last year,

constitutes an alternative for video content access for a larger audience. It happens even considering that, in the last two years, Netflix total titles had a 30% decrease. This is due to the competition with other streaming services available in the world (such as Amazon, Hulu, etc.), which increases the price of broadcasting rights – that is why Netflix started to produce its own content, such as *House of Cards*, *Daredevil*, *Beast of no Nation* or *What Happened, Miss Simone?*. However, this platform keeps offering Chilean fiction that has already been broadcast by national TV channels.

Portugal continues to increase access to the new technologies. In 2015, the ICT market accumulated 3 billion euros. The growth concentrates mainly in mobile technologies and internet connectivity.

In **Uruguay**, expansion of the cell phone market has been a constant element in the last few years, reaching 78% of the population over 12 years old. Nevertheless, the most important inflexion consisted in the fact that 1.6 million of them were smartphones in 2015, almost doubling the number from the previous year. This figure acquires its real dimension in relation to the population volume in **Uruguay**: it accounts for 50%. The connection gap has decreased in the last three years, going from 30% to 62%, and 72% of the cell phones have internet access. These data illustrate the expansion of the possibilities of audiovisual product consumption, TV fiction among them, on devices that are not the TV set.

Its neighbor, **Argentina**, presents a similar growth: in 2015, 67% of the households had a computer and 61.8% had internet access as an average at national level. At the end of the year, there were 34,785,206 internet users in **Argentina**, that is, 80.1% of the population had net access, so this country is the one with the most penetration in South America. It is also estimated that, during 2015, 11.8 million cell phones were sold, 30% of which were free devices. Besides, there were 62.8 million mobile lines technically in service, which represented a penetration of 150%.

On the other hand, **Peru**'s increase is slower but steady. In 2015, ICT access grew 2% in respect of the previous year. Contrariwise, cable television showed a 3.5% decrease in respect of 2014. Part of this decreasing tendency is due to a greater offer from services such as Netflix, compounded by a rise in prices and a constant reduction in their services offer.

In **Venezuela**, despite the adverse context, only 61 of every 100 inhabitants had internet access. The service penetration reached 61.48%, according to reports by the National Telecommunications Commission, which represents a growth of barely 1% in relation with 2014 and a deceleration in the growth of the number of users.

Spain, Brazil and Mexico reported not just increase in their level of penetration but also a context where platforms such as Netflix or ClaroVideo have forced the TV networks to compete for these new users/audiences. For example, in Brazil, Globo created Globo Play, an application that broadcasts Globo's programming live and offers the stock of shows through on demand system.

In **Spain**, the impulse of mobile television is no doubt the outstanding aspect of ICT tendencies due to at least four reasons. First, the fusion of Movistar and Canal+ has considerably reduced the offer of satellite television and boosted the service of VoD Yonvi, which reports 14 million downloads a month after four years. Second, abandoning the 800-megahertz frequency band has allowed reconfiguring the coexistence of DTT with fourth-generation data networks, another great milestone for the takeoff of mobile television. Third, the launch of Flooxer, an on-line video platform by Atresmedia that joins Atresplayer, by means of which Atresmedia offers its own contents on the internet, and Atrestube, a multichannel that combines TV programs from the communication group with products created exclusively for the net. Finally, it should be pointed out that Vodafone has incorporated Netflix access to its television offer, whose application can be executed on smart TV receptors as well as on the PS3, PS4, Xbox 360, Xbox 1, Wii and Wii U consoles, and Apple TV, Chromecast, Amazon Fire TV, smartphones and tablets.

Following with the presence and growth of Netflix in the Obitel member countries, **Mexico** is the second largest market in the world for this company, since, according to Dataxis, focused on measuring video streaming companies, Netflix controls 55.7% of the market, followed by ClaroVideo, which owns 39.7% of the sector. **Mexico** was the first country in Ibero-America where Netflix produced an original series, *Club de Cuervos*. In 2016, it will do the same with a first original series for **Brazil**.

Public TV

The shades as to the connection between public television with fiction production vary widely. Public media in **Brazil, Spain, Portugal, Ecuador, Uruguay** and **Mexico** did produce fiction in the year 2015.

Public television in **Brazil** released *República do Peru*, a series that narrates the challenges faced by the elderly. **Mexico**, via Canal Once, produced two fiction series for children: *Sofía Luna*, *Agente Especial* and *Kin*. Both fictions are aired by Canal Once Niños, which was created after the digitalization of its original signal.

In **Ecuador** the production of program *Educa. Televisión para Aprender* stands out. In three years, it produced 54 series, nine national co-productions and six international co-productions intended for young and family viewers.

Uruguay experienced some changes in its public television. The first consisted in changes in the management of the two public channels, TNU and Tevé Ciudad. The old practice is repeated once more: the management and a large part of their crews are displaced every time the government changes; therefore, dependence on the current political party or the changes of majorities within the party are reinforced. The second element refers to the passage of Tevé Ciudad from cable channel to open digital channel, although it is available only for those with the right TV set to receive the digital transmission or for cable users.

The use of public media as pro-government media prevails in **Venezuela**, where TV network Tu Comuna TV was created and it airs through the internet. It was set up with the support of the Distrito Capital government. The public media in this country work as organs to spread propaganda on behalf of the government party. Even fiction and entertainment shows have a political bias. *Guerreras y Centauros*, a *telenovela* broadcast by Televisora Venezolana Social, included an introduction praising the late president Hugo Chávez and his government administration in its first chapter.

The **United States** has only one public channel for Latin television: Vme. It uses the infrastructure of the Public Broadcasting Service (PBS) and it has managed to reach national visibility, since it is aired on secondary digital channels of PBS stations. The public character of Vme causes the network to have not only a solid programming of lifestyles, documentaries, public affairs but also shows for preschoolers and children, which led to the creation of Vme Kids.

In the year 2015 in **Colombia**, important initiatives have been undertaken to generate better positioning for public television, ranging from investment in contents and technologies to hiring satellite capacity for HD broadcast. They have even bet for the development of local and global narratives, such as the case of *Catfish Colombia* (supported by the regional channel Telecafe for MTV Latin America).

Portugal, after the changes in public communication structure, has a public media system with new programming management and direction. These changes generated debate in public opinion above all due to the pertinence of this type of communication in the Portuguese audiovisual space. Despite this, the public system presented application RTP Play, which turned out to be a veritable revelation in public television since it allowed access to all the Portuguese public TV and radio contents.

Spain continues with unknowns about the financing of TVE, which, after the elimination of commercial advertising on January

1st, 2010, depends on parliamentary subsidy and the sponsorship of cultural programs, while the mixed model of autonomous networks continues to suffer from budgetary cutbacks. Still, RTVE has improved noticeably its economic balance by means of the sale of RTVE real estate assets, the return of 70 million euros as the effect of the VAT Act and the increase of commercial incomes.

After three years, in **Peru**, public channel TV Perú produced the seasons of miniseries *Conversando con la Luna* and, in 2015, decided to release a *telenovela* directly related with social memory: *Nuestra Historia*. Co-produced with the same talents of *Conversando con la Luna*, this short *telenovela* narrated the story of different characters over almost two decades (since the end of the 1960s to the early 1980s), relating their life experiences at important moments of Peruvian history.

Finally, in **Argentina** the new government created the Federal System of Public Contents and Media by means of Decree 12/2015. The resolution establishes that the new body, which operates with a ministry's rank and attributions, is in charge of directly administering RTA (Radio Nacional, Canal 7 and news agency Télam), Tecnópolis Park and Kirchner Cultural Center. In addition, it is indirectly involved in public signals Canal Encuentro (educational), Pakapaka (children's) and DeporTV (sports), the Consulting Council for Open Digital Television and the Argentine Audiovisual Bank of Universal Contents (Bacua), which houses the audiovisual contents produced by state sponsorship. This way, areas and projects that heretofore had been working at different State bodies are transferred to a single authority. In this situation, clauses and regulations claim that the reorganization aims at "perfecting the use of public resources", based on criteria of "rationality and efficiency".

Pay TV

The increase in the number of pay television subscribers has remained steady in the Obitel member countries. Some of them have even created legislations that regulate this sector even more, which

is especially dominated by the companies that were already in control of national open television.

In the largest country of Ibero-America, **Brazil**, there are 19 million 399 thousand pay TV subscribers, which entailed a 2.8% reduction – a figure that they had not had since 2002. This phenomenon was attributed to the country's economic crisis and the rise in taxes on these services. The cable companies have launched VoD and TV everywhere services to remain competitive.

In **Mexico**, the second country with the most pay TV access, there are 16 million 882 thousand households with this service, according to the Latin American Multichannel Advertising Council (Lamac). The advance of pay television means that this type of system has gained importance in the taste of the Mexican audience, since, while Lamac claims that open television decreased its rating in 23 points, they also claim that 17 of these points were transferred to pay TV (Lamac, 2016a).

In **Spain**, the 1.4-point increase in the mean quota of pay TV viewership (17.4% in 2014 and 18.8% in 2015) is consistent with the increase in the number of subscribers, which in the second semester of the year amounted to 5,352,991 households. The growth of IP and cable distribution at the expense of the satellite is largely due to the reduction of the tariffs for the integrated packages including landline and cellular telephony, internet and television. The most relevant movement in this respect has been the fusion between Movistar and Canal+ to form Movistar+. At the end of the year, Movistar+ announced that it would launch #0, a sports and entertainment channel, which will also include fiction produced by them.

In **Ecuador**, pay television reaches one in every three households. The estimated total number of users is 5 million. The main subscription providers are DirectTV, which continues to lead the market, with 33.91%, followed by CNT, with 25.96%, and the TV Cable Group, with 15.38%. In addition, a report points out that there are 237 companies in the country that operate cable services and six

offering the service of satellite connection. CNT is the only one that covers the island region of Galápagos.

Pay television in **Colombia** has continued to grow exponentially during 2015, so it covers 48% of viewers and has managed to reach 86.8% of the population. This way, productions by the large channels have become an important focus of attention, as well as the following of international series, such as *The Walking Dead* and *Game of Thrones*, which have appeared on the pages of the national press as a media phenomenon.

The growth of pay television was also present in **Portugal**, where the number of subscribers grew 5.4 %. This growth went hand in hand with television on demand, which the cable television systems implemented to face Netflix.

In **Uruguay**, pay television reached 64% of penetration in 2015, confirming consistency in its growth rate. However, it has not brought about an increase in the possibilities for national fiction. The development of programming on the national cable channels has concentrated on shows with a journalistic style, in some cases of a cultural nature, but it has not included fiction.

Meanwhile in **Venezuela**, penetration of pay TV reached 66.86% for a total of 1,403,474 households that enjoy this service, according to Latin American Multichannel Advertising Council (Lamac, 2016b).

In the **United States**, the universe of pay television targeting the Hispanic population has grown exponentially, from 75 Hispanic networks in 2005 to 147 in 2014. This growth in the offer is accompanied by the emergence of networks not only in Spanish but also in English and bilingual. Galavisión, owned by Univision, is the network with the most viewership in the USA. The network does not present original series for the most part, but it reprograms Televisa contents. Other paid channels that have grown in Hispanic television are Fox Deportes, ESPN Deportes and Univision Deportes.

In **Peru**, pay television offers little novelty in terms of channels, as compared with what TV sets can pick up from the open signals,

whether in the VHF or UHF bands, and from the digital television signals. There are very few Peruvian channels, which are exclusive for cable in the national offer, and most of them air journalistic and cultural programs, as had been analyzed in previous reports.

Independent production companies

Independent production companies are present in all the Obitel member countries; however, not all of them have the same strength or presence. In some countries, such as Spain and Portugal, they are even made up by means of national associations; nevertheless, there are mostly isolated efforts that have found in the new technologies the channels to produce and distribute their contents.

Brazil's Pay Television Act has been an inflexion point in the Brazilian TV industry mainly due to the great impulse that it has given to independent production – that is why it has shown a significant growth. For example, there has been an increase in the technical resources areas, such as interpretation, direction, lighting and special effects, strengthening the production of series in the country.

In the **United States** the role played by independent production companies for the Hispanic television industry consolidated in 2015. Argos has become the key producer for Telemundo. The Hispanic network has signed agreements with TeleMéxico and Fox Telecolombia. Univision and Televisa have developed production projects with RTI-Colombia and content acquisition agreements with Telset, CMO Producciones and Canana Films.

Despite the fact that **Mexico's** new regulations on telecommunications forces the TV networks to include independent productions, this is something that has not happened in the area of fiction, since the existing production companies – such as Argos – decided to migrate to the United States due to lack of opportunities.

In **Ecuador**, although the largest professional field for audiovisual production companies is advertising, they have continued to make projects that have been presented in contents for program *Educa*. And thanks to the promotion of national cinema and its calls for

fiction or documentary film production, 44 independent production companies have been reported to be undertaking work in this field.

Independent production has been considerably strengthened in **Colombia** due to the presence of the internet and the great possibilities to produce contents that are offered in this sector. In addition, the emphasis on quality and the desire to grow and make projects that are ever more ambitious have caused them to grow and become an interesting space for alternative production. This way, they have developed an important production niche through products such as webseries.

In **Argentina** during 2015, most small independent production companies were supported by the different forms of financing of National Institute of Cinema and Audiovisual Arts (Incaa). The types of shows produced this way were *unitarios* or miniseries that do not surpass 13 episodes.

Unlike other countries, **Portugal** has the Independent TV Producers Association, created in 1996. This organization is made up of 22 production companies and it represents 80% of the business by the Portuguese independent production companies. The lack of legislation and/or initiatives to fit these productions in the Portuguese audiovisual scenario has caused it not to grow as expected in the local market, even though it has been successful internationally.

In **Spain** there are approximately 300 cinema and television producing companies, grouped in nine associations and integrated in the Federation of Spanish Audiovisual Producers (Fapae), a body intended to promote and defend the rights of the sector. Among the most important entrepreneurial movements, they boast the sale of 16% of Imagina (the largest Spanish audiovisual producer), owner of Globo Media, to the rest of the members. This way, Televisa's participation in the group has gone from 14.5% to 19%. Edemol Shine Group, present in over 30 markets, has completed the merger of its chapters in Spain and Portugal to be part of Endemol Shine Iberia, which encompasses Shine Iberia, Zeppelin, Gestmusic, Diagonal and Endemol Portugal. At the time these lines were being

written, Netflix is negotiating the production of a Spanish project with different national production companies, just as it has already happened in France and Italy.

There is a wide variety of independent production companies in **Uruguay**. Some of the most active are Zur, Nepal, Oz Media, Contenidos TV, Oriental Features, Mueca, Coral Cine, Vitamina, Transparente, Aceituna, Antídoto, Los Informantes, Cuadro Films, Calamari Films, Estudio 9, De la Raíz, Muchacha, Ombú Media and Negro Jefe Films. The former five have greater presence on national open television screens, in some cases with daily shows. TV fiction has not been the prioritized genre in their projects; they have rather favored entertainment, info-entertainment and some project that is documentary in nature.

Peru continued with the tendency occurring in this decade: television channels are not the only fiction production companies anymore; rather, several independent production companies produce contents that are requested by the channels. It is hard for an independent production company to make a fiction without at least one channel that would co-produce and finance a large part of the costs. Of the 12 fictions aired in 2015, eight were made by independent companies, and Del Barrio Producciones was once again the one that produced the most.

Lastly, in **Venezuela** every open signal TV station that broadcasts in the country is bound to include in their daily programming a minimum of five hours of National Independent Production (PNI), which is a production modality that emerges with the idea of promoting inclusion of contents generated by the citizenry. PNI certification expires in two years and it is renewable. Among the fiction contents offered in the PNI-Conatel catalog, we can find *Heroínas de Oriente* (series, 12 chapters, 30 minutes each), *Nos Vemos en el Espejo* (comedy, ten chapters, 21 minutes each) and others.

International trends

World Information Tracking marked five trends in the inter-

national TV market.² One of them was the super series, which is a format that is half-way between the *telenovela* and the series, but it also introduced Nordic police fictions, adaptations of ideas created for other media (cinema, books, videogames, etc.), international exchanges illustrated by the unexpected success of Turkish *telenovelas* in Latin America³ and the growth of international co-productions.

These trends were visible in 2015 in the Obitel member countries. In **Brazil**, for example, super series have established themselves at the 11 p.m. time slot on Globo. In addition, international co-productions, which are absent on open television, do present high consumption rates on other platforms, where it is possible to watch *Narcos* (Netflix), a series co-produced by **Brazil**, the **United States** and **Colombia**, and *O Hipnotizador* (HBO), produced by **Brazil**, **Argentina** and **Uruguay**. As to Turkish *telenovelas*, *Mil e Uma Noites* and *Fatmagül, a Força do Amor* (Band) were broadcast in 2015.

The phenomenon of Turkish *telenovelas* penetrated also the Hispanic television industry in the **United States**. These fictions found their initial and main distribution window in MundoMax. In 2015, the network broadcast four Turkish *telenovelas*.

Ecuador also aired two Turkish *telenovelas* on Ecuavisa: *Las Mil y Una Noches* and *¿Qué Culpa Tiene Fatmagül?*, which aroused the viewers' attention to such an extent that the former captured the prime time for over eight months and managed to move the audience to the point of wanting to know the country of origin. Three years ago something similar happened in this country, although to a lesser extent, with South Korean *telenovelas*.

Mexico also enjoyed through TV Azteca the broadcast of the Turkish *telenovela* *¿Qué Culpa Tiene Fatmagül?*, which was not as successful as expected. So, the network decided not to import

² Cf. <http://mauriciostycer.blogosfera.uol.com.br/2015/06/26/conheca-cinco-tendencias-da-televisao-no-mundo/>. Accessed in March 2016.

³ For more information about this phenomenon, see chapter on Chile on Obitel Yearbook 2015.

any more fictions from the Middle East and continued to air Brazilian *telenovelas*, which have been aired uninterruptedly since 2013.

As to the contemporary media panorama in **Colombia**, there has been a significant impact at a national level of the trends that have become essential in contemporary communicative ecosystems. These are connected, in the case of television, with its transformation in the light of digitalization and the new tendencies and habits prompted by the digital scene and the freedom of consumption it generates. That is why, just as it is happening on a global scale, the TV screen has begun to move towards the multiscreen context and the audience is beginning to take control of consumption.

As to international trends, **Portugal** presents a unique panorama, since the predominance of Brazilian fictions has begun to wane because of the growth of the local industry, which is now strongly present not only in the local but also in the international scene, mainly in Angola. Titles such as *Coração d'Ouro* feature among the most important fictions in 2015. Portugal also experienced the phenomenon of the Turkish *telenovelas* and, in turn, Turkey has become an important market for Portuguese fictions, both for finished products and for scripts.

In terms of contents, **Peru** has shown changes prompted by the presence of Turkish *telenovelas*, which brought consequences for national fiction production: postponement of some projects and production of other formats.

During 2015 **Argentina** did not present any significant increase in local production linked to the growth of pay TV fictional narrative. In the framework of open TV, long-running serialized fiction forms have been decreasing the number of shows released for some years. Besides, the tendency to transfer important productions to marginal programming slots is consolidated.

The economic crisis affecting **Venezuela**, government restrictions embodied by restrictive laws and the high levels of inflation that generate excessive and recurrent rise in the price of goods and

services have dealt heavy blows on the private Venezuelan TV companies, resulting in poor TV fiction production. Meanwhile, public television has managed generous economic resources that have been invested in strengthening government propaganda, which has had a correlate in the national *telenovelas* that have been released.

To finish this section, **Spain** has joined the diversification of pay TV offer with the arrival of Netflix, which benefits from the reduction of rates as a result of integrated packages (landline and mobile telephony, plus broadband and IPTV) offered by telecommunications companies. The increase in viewing through mobile devices and the promotion of VoD are also effects of technological-cultural convergence, just like the international expansion of open television and the boom of merchandising originating from fiction shows.

2. Comparison of television fiction in Obitel countries in 2015

The comparative synthesis of television fiction monitoring among the 12 Obitel countries is based on the production indicators established by the common Obitel Methodological Protocol.⁴ The main data presented are: total of fiction hours in the year, total of titles, formats, time slot, number of chapters and episodes, circulation data (import, export) and co-productions. We will also perform, when necessary, some analysis of the period 2013-2015 seeking to measure data temporarily and mainly to identify and analyze the most important trends in Ibero-American television fiction.

Table 2. Hours of national and Ibero-American fiction during 2015

Global offer of hours	2013		2014		2015		TOTAL
	National	Ibero	National	Ibero	National	Ibero	
	11,584	22,335	10,180	20,750	9,242	20,186	
TOTAL	33,919		30,930		29,428	94,277	

Source: Obitel

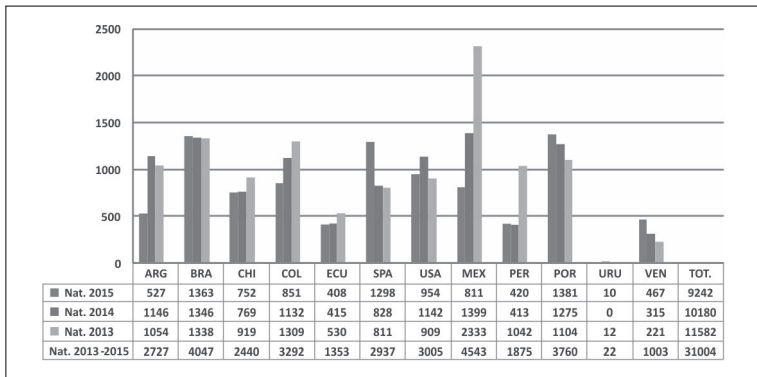
⁴ Obitel Methodological Protocol is discussed and updated yearly.

The global offer of national and Ibero-American fiction hours in 2015 was the lowest of the 2013-2015 triennium, with a decrease of 4.8% in relation to 2014 and almost 13.5% when compared to 2013. The national production had the biggest drop, in which **Argentina** and **Mexico** contributed the most: together, the two countries reduced about 1,500 local hours. In Argentina, part of the space dedicated to national fiction was filled by political programs, because it was election year, besides the six Turkish *telenovelas* in exhibition.

Despite this reduction of the global offer, there was maintenance of growth in percentage of Ibero-American fiction, which represented 68% of the total hours exhibited in 2015, against 67% in 2014 and 65% in 2013. The countries that contributed the most for this result, with an increase of Ibero-American titles, were **Peru** and, especially, **Venezuela**.

Table 3. Offer of national and Ibero-American fiction hours by country during the period 2013-2015

3.1. Offer of national fiction hours – 2013-2015



Source: Obitel

In 2015, **Brazil, Spain, Peru, Portugal, Uruguay** and **Venezuela** were the countries that showed an increase of national production, while **Argentina, Chile, Colombia, Ecuador, United States** and **Mexico** had a decrease in production.

Portugal reaffirms systematic growth trend in national production hours (despite reduction in the number of titles) and takes the first place in the table. **Brazil** also reaffirms its trend in annual growth of hours in the triennium 2013-2015 and ranks second.

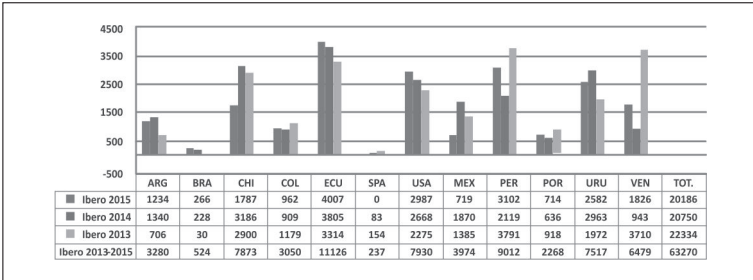
Spain, in third place, was the country that had the most significant percentage increase of national hours: 56% compared to 2014, due especially to the afternoon *telenovelas*.

And **Uruguay** re-started to produce national fiction after one year with no domestic production.

These data show that the countries that produced the most national fiction in 2015 were **Portugal, Brazil, Spain, United States** and **Colombia**, respectively. The increase of production in **Portugal** raised the country from third position in 2014 to the first in 2015. **Spain** expressive growth put the country among the top five producers. However, the continued production drop removed **Mexico**, leader since 2011, from this list. This data expresses a major reconfiguration on the production hours of fiction in *Obitel* space, as only in 2006 (the first year of monitoring) Mexico has not been among the top three national fiction producers.

Obitel considers that the national production measure in hours is the best quantitative *index of productive capacity* of television industry. Therefore, verifying the trend of the triennium 2013-2015, we have: **Brazil** and **Mexico** in the range of countries with *great productive capacity*; **Colombia, United States** and **Portugal** in the range of *medium productive capacity*; **Argentina, Chile** and **Spain** as countries with *medium-low productive capacity*; and **Ecuador, Peru** and **Venezuela**, with *low productive capacity*. **Uruguay** is far behind in this group, being essentially an importing country of the Ibero-American television fiction.

3.2. Offer of Ibero-American fiction hours – 2013-2015



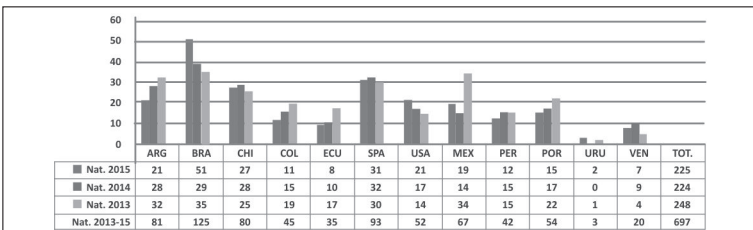
Source: Obitel

In relation to the offer of Ibero-American fiction hours, most countries registered increase of imported productions. Exceptions were **Argentina, Chile, Spain, Mexico** and **Uruguay**, which showed a decrease of total hours in 2015. The most expressive drops were in **Chile (44%)** and **Mexico (61%)**. In the first one, the importation drop of Ibero-American titles (18 products less than in 2014) is also a reflection of the “Turkish screen invasion”, since 11 Turkish *telenovelas* were exhibited in the country.

When comparing imported and national fiction hours, only **Brazil, Spain, Portugal** and **Mexico** showed more national production hours than Ibero-American ones, meaning they produced more than imported in 2015.

Table 4. Offer of national and Ibero-American fiction titles by country: 2013-2015

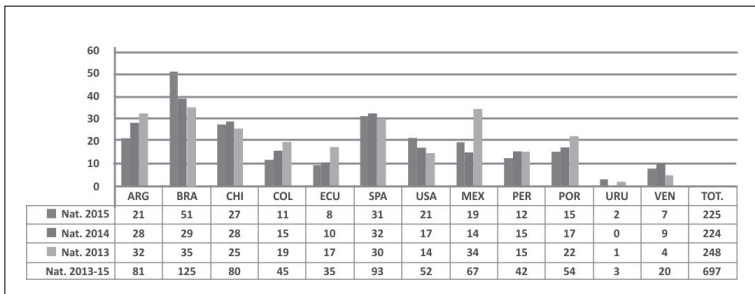
4.1. Offer of national fiction titles



Source: Obitel

In spite of **Spain** having showed the biggest increase in numbers of national hours, the country produced one less title than in 2014. On the other hand, **Brazil** did not have an expressive growth in the number of national hours (just 17), but it recorded an increase of 31% in comparison with last year. This shows the predominance of short stories in **Brazil**, mostly *unitarios*, while in **Spain** the prevalence was long-term fictions, especially the *telenovelas* exhibited in the afternoon. **Mexico**, after the drop in 2015, returned to register a gain of production (35% more titles than in 2014), combined with a new drop of imported ones.

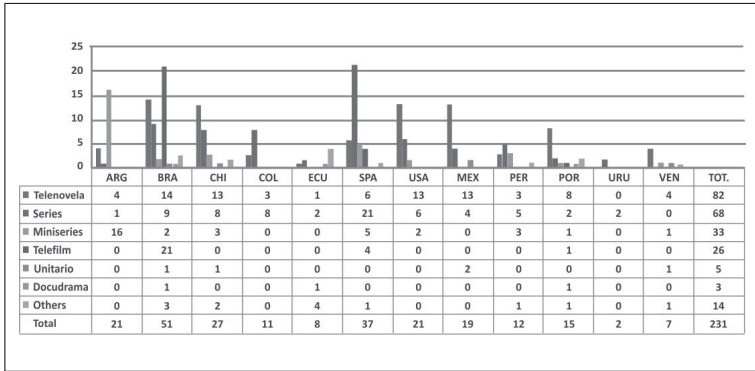
4.2. Offer of Ibero-American fiction titles



Source: Obitel

When comparing the results of the 2013-2015 triennium, we verified that only **Brazil** and **United States** had a constant growth on national titles in relation to the imported ones. **Argentina**, **Colombia**, **Ecuador**, **Peru** and **Portugal** registered an opposite movement of continuous drop in the number of national titles.

Ecuador and **Uruguay** were the countries where Ibero-American products had the strongest presence. In **Ecuador** there were eight national titles and 48 imported ones, meaning 500% more Ibero-American titles in exhibition than national ones. **Uruguay** produced only two titles, and there were 39 Ibero-American ones in exhibition.

Table 5. National fiction formats and number of titles in 2015

Source: Obitel

In 2015, as observed in previous years, *telenovela* remains the main fiction product, according to the number of titles (82 in total) produced by Obitel countries. **Brazil** had the largest *telenovela* production (14), ahead of **Chile**, **USA** and **Mexico**, with 13 titles each. **Argentina's** *telenovela* presented a 70% fall, from 14 to four titles. On the other hand, **Spain**, which had not produced any *telenovela* in the previous year, presented in 2015 a remarkable rise, totalizing six titles. The other countries kept similar numbers to the 2014's, as **Portugal** (eight), **Venezuela** (four), **Peru** and **Colombia** (three, each).

The production of **series** had a strong decrease, from 77 to 68 titles in total, losing strength to other short narratives formats, like miniseries and telefilms, especially in **Argentina** and **Brazil**. As in previous years, **Spain** stands over as a series producer, with 21 titles. In third and second places were **Brazil** (nine), **Chile** and **Colombia** (eight, each). We emphasize the **USA's** production in Hispanic language, which tripled the series offers, totalizing six titles, and **Mexico**, which doubled its production in 2015, with four series, but also did not manage to come back to seven titles like in 2013. **Peru** presented less than two series comparing to the last year, but it kept the average, with five titles. **Portugal**, **Ecuador** and **Uruguay**

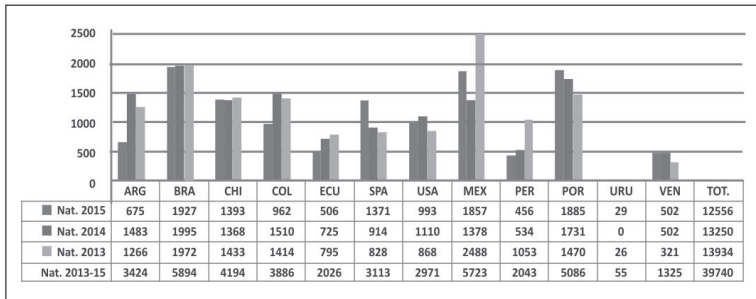
presented two titles each, although it is important to notice that the first two had a fall of over 50% in this format production when compared to 2014.

The **miniseries** were at third place in the format ranking, with 33 productions from all Obitel countries in 2015. **Argentina** was the highlight, with 16 titles, double than last year. **Brazil** and **Peru** slightly reduced the production of miniseries in 2015. **Spain, Portugal** and **Venezuela** kept 2014's numbers, and **USA** and **Chile** had a minor increase in this production type.

In terms of format, **telefilms** were a highlight in 2015, jumping from four to 26 titles in total, because of **Brazil's** elevated production due to the celebration of Globo's 50 Years. In the occasion, the broadcast presented many successful fiction titles edited in this new format. In second place, **Spain** continued to present similar numbers of telefilms (four), as did **Portugal** (one), comparing to previous years.

Table 6. Offer of national and Ibero-American fiction chapters/episodes during the period 2013-2015

Table 6.1. Offer of national fiction chapters



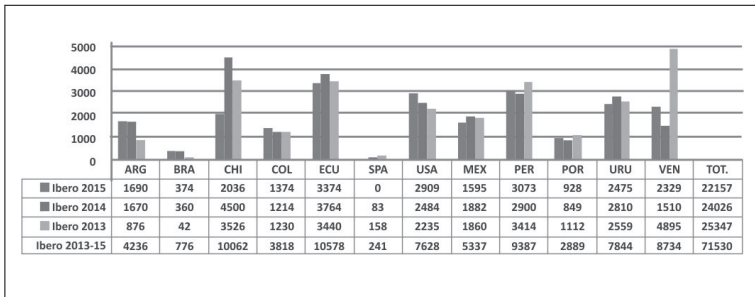
Source: Obitel

The three countries that registered the highest number of chapter/episodes of national fiction were, respectively, **Brazil, Portugal** and **Mexico**. The latter, after a sharp fall registered from 2013 to 2014 (around 45%), showed an increase of 35% of chapters offered

in 2015 – also related to the increase of national production titles, most of them with long-term duration.

From 2014 to 2015, an expressive growth of chapters/episodes produced by **Spain** stands out – due mainly to the *telenovelas* exhibited in the afternoon –, especially if we take into account that the country presents one less national title than registered in 2014 (from 32 to 31). **Colombia**, with a fall in the number of titles (from 15 to 11, meaning 27%), registered a decrease of over 33% of chapters. It is worth reminding that, in 2015, the Colombian TV dedicated more space to sports, besides a larger focus on news and entertainment programs.

6.2. Offer of Ibero-American fiction chapters



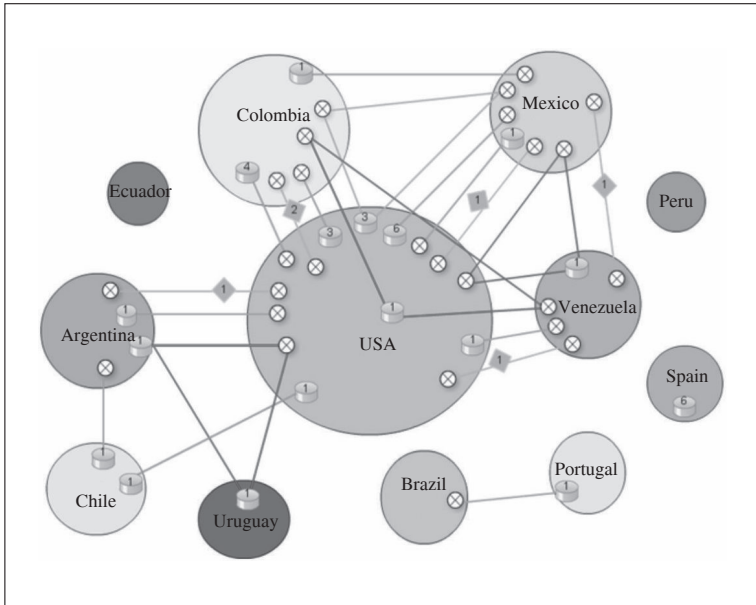
Source: Obitel

Argentina, Brazil, Colombia, USA, Peru, Portugal and Venezuela showed a growth in the offer of chapters/episodes of Ibero-American fiction in 2015. While this increase was modest in the first six mentioned countries, **Venezuela** on the other hand registered, in comparison with the 2014's data, an increase of over 50% in the exhibition of chapters/episodes of Ibero-American productions, current upholders of the country's TV fiction.

The most expressive fall regarding the exhibition of chapters/episodes of Ibero-American fiction in relation to 2014 was observed in **Spain**, where the imported fictions in 2015 were restricted to non Obitel countries, and in **Chile** (decrease of 54%), country of the

“Turkish conquest”. Giving consideration to the stability of Chilean national fiction hours in these two years, it is clear that the 13 Turkish fictions exhibited in the country are occupying time slots that used to air Ibero-American productions.

Table 7. Co-productions between Obitel countries in 2015⁵



Source : Obitel

The infographic above shows the partnerships between Obitel countries on co-production of TV fiction. The lines show the partnerships, the cylinders in gray point out the co-productions made and exhibited in the country and the crossed circles represent the participation of a country in a co-production that was not transmitted in the country’s territory. The connection between two crossed

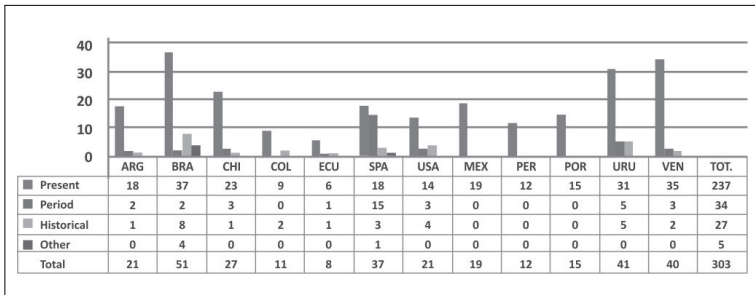
⁵ *El Señor de los Cielos* had the first season co-produced by Colombia and the United States, meanwhile the second and third seasons were co-produced by the United States and Mexico. In the infographic, the production was considered co-produced by the three countries.

circles implies that the co-production was exhibited in a third country, not the ones who participated in the co-production. As an example, there are six co-productions between the United States and Mexico exhibited only in the United States. Thus, the line connects the two countries and, at one end (USA), there is a gray cylinder with the number 6 and, at the other end, there is a crossed circle. Another example is *Violetta*, a co-production between Argentina and United States, aired only in Uruguay.

The country that most participated in co-production was the **United States**, with 24 fiction titles, having aired 15 of them in the country. **Colombia**, in turn, was the second biggest co-producer, participating in nine collaborations, even though they have aired only five of them. In third place appears **Mexico**, with seven co-productions and only one exhibition. There were also co-productions between three countries, as the three carried out by the **United States, Colombia and Mexico**.

Brazil and Portugal had one co-production, *Mar Salgado*, between Globo and SIC, exhibited only in Portugal. The same happened with **Chile and Argentina**, which produced *El Bosque de Karadima*, between Ocio and Telemundo, aired only in Chile. **Spain** co-produced six titles, but none of them with Obitel member countries.

Table 8. Temporality of national fiction in 2015

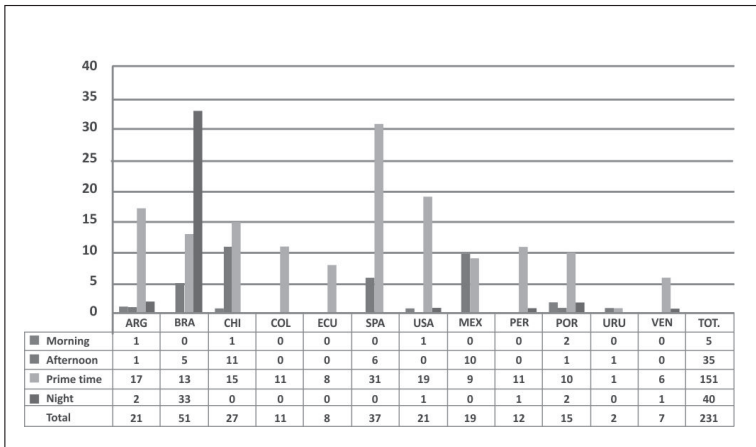


Source: Obitel

As observed since the beginning of *Obitel* monitoring, **present time** fiction is prevalent, configuring the diegesis of 77% of the narratives exhibited in 2015. It also worth noting that all fictions produced in **Mexico, Peru, Portugal** and **Uruguay** had the plot developed only in the present time. In the Mexican case, denoting certain abandon of the historical or epical fictions is a trend of the last few years. The Peruvian television, on the other hand, preferred contemporary narratives due to lower production costs – it avoids expenses with costumes and remote epical set/locations. **Portugal** highlights a cultural question: plots in the present time appear to be closer to the viewer’s everyday life.

Spain keeps the tradition on the production of past time fiction: period and historical fiction represented, together, around 49% of all production, the same number of contemporary narratives. Similar case happened in **Brazil**, where the expressive number of titles observed in 2015 enabled a time-space diversity in the narratives, which were set in all periods of time.

Table 9. Titles of national fiction by time slot in 2015



Source: *Obitel*

In 2015, as in the previous years, **prime time** held the highest number of national fiction titles (65%), while the **morning time** concentrated the lowest (2%). Curiously, both countries with the highest production capacity – **Brazil** and **Mexico** –, despite concentrating their main fiction at prime time, presented the largest number of titles in another time slot: in **Brazil**, as the trend pointed out in 2014, the **night time** is the one that holds the larger quantity of fiction – 65% in 2015; while in **Mexico** the **afternoon** exceptionally presented 53% of the fiction titles.

3. The top ten TV fictions of the year

**Table 10. The ten most watched titles in 2015:
origin, format, audience and share**

	Title	Aud. %	Share %	Format	Production company	Channel	Private or public TV	Country of original script	Display country
1	<i>Império</i>	36.66	59.36	<i>Tele-novela</i>	Globo	Globo	Private	Brazil	Brazil
2	<i>A Regra do Jogo</i>	26.89	42.74	<i>Tele-novela</i>	Globo	Globo	Private	Brazil	Brazil
3	<i>Babilônia</i>	26.16	42.12	<i>Tele-novela</i>	Globo	Globo	Private	Brazil	Brazil
4	<i>Alto Astral</i>	25.16	44.10	<i>Tele-novela</i>	Globo	Globo	Private	Brazil	Brazil
5	<i>Totalmente Demais</i>	25.02	43.37	<i>Tele-novela</i>	Globo	Globo	Private	Brazil	Brazil
6	<i>I Love Paraisópolis</i>	24.88	40.79	<i>Tele-novela</i>	Globo	Globo	Private	Brazil	Brazil
7	<i>Tim Maia – Vale o que Vier</i>	24.77	49.41	Telefilm	Globo	Globo	Private	Brazil	Brazil
8	<i>Pituca Sin Lucas</i>	24.70	41.80	<i>Tele-novela</i>	Mega	Mega	Private	Chile	Chile
9	<i>Al Fondo Hay Sitio (7th season)</i>	24.40	35.50	Soap opera	América Televisión	América Televisión	Private	Peru	Peru

10	<i>Amor de Madre</i>	23.50	33.00	<i>Tele-novela</i>	Del Barrio Producciones	América Televisión	Private	Peru	Peru
11	<i>Ó Paí, Ó – Luz, Câmera 50 Anos</i>	23.36	44.65	Tele-film	Globo	Globo	Private	Brazil	Brazil
12	<i>Papá a la Deriva</i>	22.90	36.70	<i>Tele-novela</i>	Mega	Mega	Private	Chile	Chile
13	<i>O Canto da Sereia – Luz, Câmera 50 Anos</i>	22.78	46.97	Tele-film	Globo	Globo	Private	Brazil	Brazil
14	<i>Além do Tempo</i>	21.95	39.98	<i>Tele-novela</i>	Globo	Globo	Private	Brazil	Brazil
15	<i>Ven Baila Quinceañera</i>	21.80	34.90	<i>Tele-novela</i>	PRO TV Producciones	América Televisión	Private	Peru	Peru
16	<i>La Gata</i>	21.40	31.10	<i>Tele-novela</i>	Televisa	América Televisión	Private	Mexico	Peru
17	<i>Locura de Amor</i>	21.20	32.80	Series	Del Barrio Producciones	América Televisión	Private	Peru	Peru
18	<i>Rastros de Mentiras</i>	20.20	32.20	<i>Tele-novela</i>	Globo	Tele-doce	Private	Brazil	Uruguay
19	<i>Amores con Trampa</i>	19.10	30.00	<i>Tele-novela</i>	Televisa	Canal 2	Private	Chile	Mexico
20	<i>Pulseras Rojas</i>	19.10	28.30	Mini-series	Del Barrio Producciones	América Televisión	Private	Peru	Peru
21	<i>Lo Imperdonable</i>	18.16	27.58	<i>Tele-novela</i>	Televisa	Canal 2	Private	Mexico	Mexico
22	<i>Pasión y Poder</i>	17.10	26.50	<i>Tele-novela</i>	Televisa	América Televisión	Private	Mexico	Peru
23	<i>Antes Muerta que Lichita</i>	16.75	26.33	<i>Tele-novela</i>	Televisa	Canal 2	Private	Mexico	Mexico

24	<i>La Rosa de Guadalupe</i>	16.30	32.18	<i>Unitario</i>	Televisa	Canal 2	Private	Mexico	Mexico
25	<i>El Canto de la Sirena</i>	16.00	26.90	<i>Mini-series</i>	Globo	Tele-doce	Private	Brazil	Uruguay
26	<i>Lo Imponderable</i>	15.80	23.00	<i>Tele-novela</i>	Televisa	América Televisión	Private	Mexico	Peru
27	<i>Esperanza Mía</i>	15.60	22.80	<i>Tele-novela</i>	Pol-ka	Tele-doce	Private	Argentina	Uruguay
28	<i>Pasión y Poder</i>	15.55	24.59	<i>Tele-novela</i>	Televisa	Canal 2	Private	Mexico	Mexico
29	<i>Como Dice el Dicho</i>	15.52	30.65	<i>Unitario</i>	Televisa	Canal 2	Private	Mexico	Mexico
30	<i>A que no Me Dejas</i>	15.46	26.71	<i>Tele-novela</i>	Televisa	Canal 2	Private	Mexico	Mexico
31	<i>Que Te Perdona Dios, Yo No</i>	15.43	28.04	<i>Tele-novela</i>	Televisa	Canal 2	Private	Mexico	Mexico
32	<i>Mar Salgado</i>	15.30	31.8	<i>Tele-novela</i>	SP Televisão	SIC	Private	Portugal	Portugal
33	<i>La Vecina</i>	14.93	27.91	<i>Tele-novela</i>	Televisa	Canal 2	Private	Colombia	Mexico
34	<i>Imperio</i>	14.80	22.70	<i>Tele-novela</i>	Globo	Tele-doce	Private	Brazil	Uruguay
35	<i>Rastros de Mentiras</i>	14.53	10.60	<i>Tele-novela</i>	Globo	Ecuavisa	Private	Brazil	Ecuador
36	<i>La Guerrera</i>	14.32	10.47	<i>Tele-novela</i>	Globo	Ecuavisa	Private	Brazil	Ecuador
37	<i>Única Mulher</i>	14.20	29.6	<i>Tele-novela</i>	Plural Entertainment	TVI	Private	Portugal	Portugal
38	<i>Esperanza Mía</i>	14.10	27.70	<i>Tele-novela</i>	Pol-ka	El Trece	Private	Argentina	Argentina
39	<i>Mi Corazón Es Tuyo</i>	14.10	23.50	<i>Tele-novela</i>	Televisa	Televisa	Private	Spain	USA
40	<i>Coração d'Ouro</i>	13.50	28.2	<i>Tele-novela</i>	SP Televisão	SIC	Private	Portugal	Portugal
41	<i>Celia</i>	13.20	19.60	<i>Tele-novela</i>	Fox Telecolombia	Canal 13	Private	Colombia	Chile
42	<i>Hasta el Fin del Mundo</i>	13.10	21.30	<i>Tele-novela</i>	Televisa	Televisa	Private	Mexico	USA

43	<i>Diomedes, el Cacique de la Junta</i>	13.06	38.52	<i>Tele-novela</i>	RCN	TC Televisión	Private	Colombia	Colombia
44	<i>El Bosque de Karadima</i>	13.00	18.90	Mini-series	Ocio	CHV	Private	Chile	Chile
45	<i>Eres Mi Tesoro</i>	13.00	27.90	<i>Tele-novela</i>	AGTV/ Mega	Mega	Private	Chile	Chile
46	<i>Solamente Milagros (4th season)</i>	13.00	27.90	Series	América Televisión	América Televisión	Private	Peru	Peru
47	<i>Lady, la Vendedora de Rosas</i>	12.97	42.21	Series	RCN	RCN	Private	Colombia	Colombia
48	<i>Rastros de Mentiras</i>	12.70	23.60	<i>Tele-novela</i>	Globo	Telefe	Private	Brazil	Argentina
49	<i>Amor de Barrio</i>	12.56	25.39	<i>Tele-novela</i>	Televisa	Canal 2	Private	Mexico	Mexico
50	<i>La Fiesta</i>	12.40	18.40	Mini-series	Globo	Tele-doce	Private	Brazil	Uruguay
51	<i>En Otra Piel</i>	12.39	10.02	<i>Tele-novela</i>	Tele-mundo	Ecuavisa	Private	USA	Ecuador
52	<i>La Malquerida</i>	12.20	20.70	<i>Tele-novela</i>	Televisa	Televisa	Private	Mexico	USA
53	<i>La Guerrera</i>	12.20	18.10	<i>Tele-novela</i>	Globo	ATV	Private	Brazil	Peru
54	<i>Niños Robados</i>	11.90	21.00	Mini-series	Telecinco Cinema	Telefe	Private	Spain	Argentina
55	<i>Historia de un Clan</i>	11.80	19.50	Mini-series	Underground/ Telefe	Telefe	Private	Argentina	Argentina
56	<i>Viudas e Hijos del Rock & Roll</i>	11.60	19.80	<i>Tele-novela</i>	Underground/ Endemol	Telefe	Private	Argentina	Argentina
57	<i>Flor del Caribe</i>	11.50	22.90	<i>Tele-novela</i>	Globo	Tele-doce	Private	Brazil	Uruguay
58	<i>La Chúcarra</i>	11.30	23.90	<i>Tele-novela</i>	DDRío/ TVN	TVN	Public	Chile	Chile
59	<i>Dinosaurios y Robots</i>	11.30	18.30	<i>Tele-novela</i>	Globo	Tele-doce	Private	Brazil	Uruguay
60	<i>Que Te Perdona Dios, Yo No</i>	11.20	19.60	<i>Tele-novela</i>	Televisa	Televisa	Private	Mexico	USA

61	<i>Jardins Proibidos</i>	11.20	28.8	<i>Tele-novela</i>	Plural Entertainment	TVI	Private	Portugal	Portugal
62	<i>Familia Moderna</i>	11.10	20.40	Series	Mega	Mega	Private	USA/Chile	Chile
63	<i>Signos</i>	11.00	16.90	Mini-series	Pol-ka/ Turner	El Trece	Private	Argentina/ USA	Argentina
64	<i>El Señor de los Cielos 3</i>	10.90	19.60	<i>Tele-novela</i>	Tele-mundo/ Argos	Tele-mundo	Private	USA/ Mexico	USA
65	<i>Lo Imperdonable</i>	10.50	18.40	<i>Tele-novela</i>	Televisa	Televisa	Private	Mexico	USA
66	<i>Las Cariocas</i>	10.50	17.40	Series	Globo/ Lereby	Tele-doce	Private	Brazil	Uruguay
67	<i>El Príncipe</i>	10.40	24.10	Series	Plano a Plano	Tele5	Private	Spain	Spain
68	<i>Los Hijos de Don Juan</i>	10.35	7.79	Series	TC Televisión	TC Televisión	Seized	Ecuador	Ecuador
69	<i>Las Hermanitas Calle</i>	10.26	21.91	Series	Caracol	Caracol	Private	Colombia	Colombia
70	<i>La Gata</i>	10.20	17.70	<i>Tele-novela</i>	Televisa	Televisa	Private	Mexico	USA
71	<i>Amores con Trampa</i>	10.10	18.40	<i>Tele-novela</i>	Televisa	Televisa	Private	Mexico	USA
72	<i>La Sombra de Helena</i>	10.05	7.37	<i>Tele-novela</i>	Globo	Ecuavisa	Private	Brazil	Ecuador
73	<i>Sala de Urgencias</i>	9.99	35.62	Series	RCN	RCN	Private	USA/ Colombia	Colombia
74	<i>Las Brasileñas</i>	9.90	17.50	Series	Globo/ Lereby	Tele-doce	Private	Brazil	Uruguay
75	<i>Santa Bárbara</i>	9.80	26.3	<i>Tele-novela</i>	Plural Entertainment	TVI	Private	Mexico	Portugal
76	<i>Así Pasa</i>	9.70	15.70	Series	Ecuavisa	Ecuavisa	Private	Ecuador	Ecuador
77	<i>Guapas</i>	9.70	22.70	Series	Pol-ka	Tele-doce	Private	Argentina	Uruguay
78	<i>Noche & Día</i>	9.60	17.60	<i>Tele-novela</i>	Pol-ka	El Trece	Private	Argentina	Argentina
79	<i>Allí Abajo</i>	9.60	22.40	Series	Plano a Plano	Antena3	Private	Spain	Spain

80	<i>Guapas</i>	9.40	16.90	<i>Tele-novela</i>	Pol-ka	El Trece	Private	Argentina	Argentina
81	<i>Yo no Creo en los Hombres</i>	9.40	17.20	<i>Tele-novela</i>	Televisa	Televisa	Private	Mexico	USA
82	<i>Imperio</i>	9.37	7.38	<i>Tele-novela</i>	Globo	Ecuavisa	Private	Brazil	Ecuador
83	<i>Pasión y Poder</i>	9.30	16.10	<i>Tele-novela</i>	Televisa	Televisa	Private	Mexico	USA
84	<i>Celia</i>	9.28	22.34	<i>Tele-novela</i>	Fox Teleco-lombia	RCN	Private	Colombia	Colombia
85	<i>3 Familias</i>	9.25	7.92	Series	Ecuavisa	Ecuavisa	Private	Ecuador	Ecuador
86	<i>Celia</i>	9.22	7.35	<i>Tele-novela</i>	Fox Teleco-lombia	TC Televisión	Seized	Colombia	Ecuador
87	<i>Rastros de Mentiras</i>	9.20	19.10	<i>Tele-novela</i>	Globo	Canal 13	Private	Brazil	Chile
88	<i>La que se Avecina</i>	9.10	23.60	Series	Infinia/Alba Adriática	Tele5	Private	Spain	Spain
89	<i>La Ronca de Oro</i>	9.06	9.45	<i>Tele-novela</i>	CMO Producciones	Ecuavisa	Private	Colombia	Ecuador
90	<i>Chipe Libre</i>	9.00	13.20	<i>Tele-novela</i>	Canal 13	Canal 13	Private	Chile	Chile
91	<i>Lo que Callamos las Mujeres</i>	9.00	18.60	<i>Unitario</i>	Ojos Claros/CHV	CHV	Private	Mexico/Chile	Chile
92	<i>Poderosas</i>	8.70	21.6	<i>Tele-novela</i>	SP Televisão	SIC	Private	Portugal	Portugal
93	<i>Amores Robados</i>	8.60	14.40	Mini-series	Globo	Telefe	Private	Brazil	Argentina
94	<i>Los Nuestros</i>	8.20	19.60	Mini-series	Multi-park/Mediaset	Tele5	Private	Spain	Spain
95	<i>Mar de Plástico</i>	8.20	21.36	Mini-series	Boomerang TV	Antena3	Private	Spain	Spain
96	<i>Bajo Sospecha</i>	8.20	18.90	Series	Bambú Producciones	Antena3	Private	Spain	Spain
97	<i>Vis a Vis</i>	8.00	19.80	Series	Globo-media	Antena3	Private	Spain	Spain

98	<i>Laura, la Santa Colombiana</i>	7.94	23.83	Series	Caracol	Caracol	Private	Colombia	Colombia
99	<i>El Laberinto de Alicia</i>	7.79	24.16	Series	RCN	RCN	Private	Chile/Colombia	Colombia
100	<i>Entre Caníbales</i>	7.60	14.60	Series	Telefe/100 Bares/Monte Carlo TV	Telefe	Private	Argentina/Uruguay	Argentina
101	<i>Velvet</i>	7.60	19.10	Series	Bambú Producciones	Antena3	Private	Spain	Spain
102	<i>Anclados</i>	7.50	18.90	Series	Globomedia	Tele5	Private	Spain	Spain
103	<i>La Viuda Negra</i>	7.45	29.44	Series	Televisa/Caracol	Caracol	Private	Colombia/Mexico	Colombia
104	<i>Niche</i>	7.41	22.74	Series	Caracol	Caracol	Private	Colombia	Colombia
105	<i>Tiro de Gracia</i>	7.29	21.59	Series	Televisa/Caracol	Caracol	Private	Colombia/Mexico	Colombia
106	<i>Cuéntame Cómo Pasó (16th season)</i>	7.00	16.90	Series	Grupo Ganga	La1	Public	Spain	Spain
107	<i>Mulheres</i>	6.80	24.2	<i>Tele-novela</i>	Plural Entertainment	TVI	Private	Colombia	Portugal
108	<i>Bem-Vindos a Beirais</i>	6.30	12.9	Series	SP Televisão	RTP	Public	Portugal	Portugal
109	<i>Lo que la Vida Me Robó</i>	4.67	22.37	<i>Tele-novela</i>	Televisa	Venevisión	Private	Mexico	Venezuela
110	<i>Avenida Brasil</i>	4.17	18.40	<i>Tele-novela</i>	Globo	Televen	Private	Brazil	Venezuela
111	<i>Mi Corazón Es Tuyo</i>	4.11	19.10	<i>Tele-novela</i>	Televisa	Venevisión	Private	Mexico	Venezuela
112	<i>Água de Mar</i>	4.00	8.2	<i>Tele-novela</i>	Coral Europa	RTP	Public	Portugal	Portugal
113	<i>Voltea pa' que Te Enamores</i>	3.70	22.86	<i>Tele-novela</i>	Venevisión	Venevisión	Private	Venezuela	Venezuela

114	<i>Amores con Trampa</i>	3.44	17.65	<i>Tele-novela</i>	Televisa	Venevisión	Private	Mexico	Venezuela
115	<i>Amor Secreto</i>	3.34	17.61	<i>Tele-novela</i>	Venevisión	Venevisión	Private	Venezuela	Venezuela
116	<i>Nossos Dias</i>	3.30	17.4	<i>Tele-novela</i>	SP Televisão	RTP	Public	Portugal	Portugal
117	<i>Válgame Dios</i>	3.18	21.63	<i>Tele-novela</i>	Venevisión	Venevisión	Private	Venezuela	Venezuela
118	<i>La Rosa de Guadalupe</i>	3.14	20.07	Series	Televisa	Venevisión	Private	Mexico	Venezuela
119	<i>Por Siempre Mi Amor</i>	2.90	19.24	<i>Tele-novela</i>	Televisa	Venevisión	Private	Mexico	Venezuela
120	<i>Confesiones del Más Allá</i>	2.66	15.05	Series	TV Azteca	Televen	Private	Mexico	Venezuela

Source: *Obitel*, including data provided by survey institutes from each of the 12 chapters

Table 10 brings the **ten most watched fictions** in each of the 12 *Obitel* countries, amounting to the 120 productions ordered by rating. It is interesting to note that only three countries appear among the top ten of all audiences, all with national productions: seven from **Brazil**, two from **Peru** and one from **Chile**. In addition, eight of these fictions are *telenovelas*, confirming the Latin American preference for the format, complemented by a telefilm and a soap opera.

Countries that had the most exported and displayed productions in other *Obitel* countries were: **Mexico**, with 18, **Brazil**, with 14, and **Colombia**, with five productions.

Another important data is that almost 32% (38 titles) of the top ten fiction titles are exported. The most exported production was *Rastros de Mentiras*, from Brazil, exhibited in four *Obitel* countries, followed by *Império* (Brazil), *Mi Corazón Es Tuyo* (USA), *Lo Imperdonable* (Mexico), *La Gata* (Mexico), *Amores con Trampa* (Chile), *Pasión y Poder* (Mexico) and *Celia* Colombia), with two exportations each. Other 22 productions were exported once.⁶

⁶ Productions that were exported once: *Niños Robados*, *La Guerrera*, *En Otra Piel*, *La*

Besides, there were 11 script adaptations from other countries: *Familia Moderna* (original from USA) and *Lo que Callamos las Mujeres* (from Mexico), produced in Chile; *Sala de Urgencias* (from USA), produced in Colombia; *Amores con Trampa* (from Chile) and *La Vecina* (from Colombia), produced by Televisa in Mexico; and *Santa Barbara* (from Mexico) and *Mulheres* (from Colombia), produced by Plural Entertainment and exhibited on TVI in Portugal.

In 2015, no fiction hit 40 rating points, as opposed to 2014, when *Amor à Vida* (Globo) reached 41 points. The average audience of the ten most watched titles, however, had no other major changes in the other table positions.

Table 11. Formats and time slots of the ten most watched titles in 2015

Country	Formats							Time slot			
	<i>Tele-nove-la</i>	Se-ries	Mi-ni-se-ries	Tele-film	<i>Uni-tario</i>	Docu-dra-ma	Others	Morn-ing	Af-ter-noon	Prime time	Night
Argentina	5	1	4	0	0	0	0	0	0	10	0
Brazil	7	0	0	2	0	1	0	0	1	6	3
Chile	7	1	1	0	1	0	0	0	4	5	1
Colombia	2	8	0	0	0	0	0	0	0	10	0
Ecuador	7	3	0	0	0	0	0	0	0	10	0
Spain	0	9	1	0	0	0	0	0	0	10	0
USA	10	0	0	0	0	0	0	0	0	10	0
Mexico	8	0	0	0	2	0	0	0	5	5	0
Peru	6	2	1	0	0	0	1	0	0	10	0
Portugal	9	1	0	0	0	0	0	0	1	9	0

Sombra de Helena, La Ronca de Oro, Hasta el Fin del Mundo, La Malquerida, Que Te Perdone Dios, Yo No, Yo no Creo en los Hombres, El Canto de la Sirena, Esperanza Mía, La Fiesta, Flor del Caribe, Dinosaurios y Robots, Las Cariocas, Las Brasileñas, Guapas, Lo que la Vida Me Robó, Avenida Brasil, La Rosa de Guadalupe, Confesiones del más Allá and Por Siempre Mi Amor.

Uruguay	5	3	2	0	0	0	0	0	0	5	5
Venezuela	8	2	0	0	0	0	0	0	3	7	0
Total	74	30	9	2	3	1	1	0	14	97	9
Total							120				120

Source: Obitel

The ten most watched fictions of each country in 2015 are classified by formats and time slot in Table 11. Among the most prominent formats are the *telenovelas* (74) and the series (30), then the miniseries (nine), *unitarios* (three) and telefilms (two). These data show that, despite the growing role of short stories in some countries, especially in the previous years, the number of *telenovelas* among the most watched titles in all Obitel countries indicates that the success of long stories is still evident in 2015. As Table 5 showed, in addition to the series, other short narrative formats, such as miniseries, telefilms and *unitarios*, appear in Table 11 with greater expressiveness in relation to the previous year. The total number of miniseries and TV movies, for example, almost doubled compared to 2014.

In 2015, the **United States** was the country in which *telenovelas* were more successful given that it is the only format on the list of the most watched titles. Next, **Portugal, Mexico** and **Venezuela** as well as **Brazil, Ecuador** and **Spain**, in that order, had the list filled by seven or more *telenovelas*. **Peru, Argentina** and **Uruguay** had higher balance in formats. By contrast, in **Spain** and **Colombia** the series stood out. The prime time remains the favorite time slot for fiction in all Obitel countries, once in half of the countries all the most watched fictions were exhibited at this time slot.

Table 12. Countries producing and importing the ten most watched titles in 2015 in Obitel countries

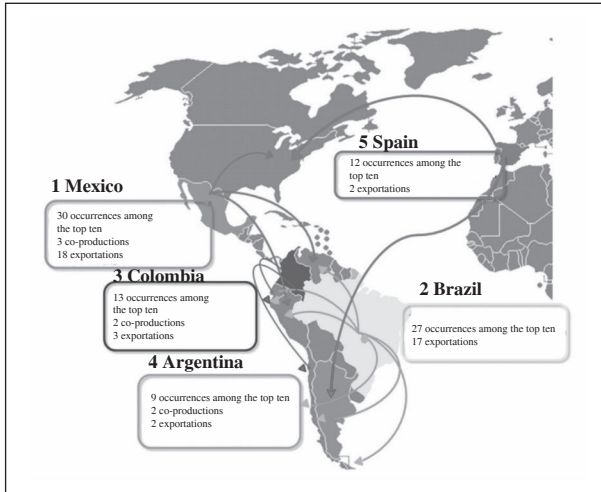
Producer country	Number of occurrences	Number of titles	Trade number	Importing countries
Mexico	30	21	18	USA, Peru, Venezuela
Brazil	27	21	17	Argentina, Chile, Ecuador, Peru, Uruguay, Venezuela
Colombia	13	11	3	Chile, Ecuador
Spain	12	12	2	Argentina, USA
Argentina	9	7	2	Uruguay
Portugal	10	10	0	0
Chile	8	8	0	0
Peru	6	6	0	0
United States	3	3	2	Argentina, Ecuador
Ecuador	3	3	0	0
Venezuela	3	3	0	0
Uruguay	1	1	0	0
TOTAL⁷	125	106	44	-

Source: Obitel

Table 12 shows the circulation of the top ten titles of each Obitel country. The most watched fictions vary between domestic productions, Ibero-American productions and co-productions. The number of occurrences indicates how many times a production of the same country appears among the 120 most watched titles. These productions may have appeared among the best audiences in their own country or may have been shown successfully in other countries. This was the case of *Rastros de Mentiras* (originally, *Amor à Vida*), a Brazilian *telenovela* that was among the top ten in **Uruguay, Ecuador, Argentina** and **Chile**. In total, 106 titles have occupied the top audiences in Obitel countries, resulting in 44 production trades. Figure 1 illustrates this distribution.

⁷ The result is higher than 120 because five co-productions were accounted for each country.

Figure 1. Distribution of the ten most watched titles in each country



Source: *Obitel*

Among the 120 most watched fictions, **Mexico** and **Brazil** are the largest producers, with 30 productions and 27, respectively. In the case of **Mexico**, all the fictions of the top ten are national production, 18 productions were among the largest audiences in the United States, Peru and Venezuela, apart from having two co-productions shown in Colombia. **Brazil**, besides having all domestic productions in the top ten in the country, took another 17 positions in the ranking of Argentina, Chile, Ecuador, Peru, Uruguay and Venezuela. **Colombia** and **Spain** also exceeded ten national positions and appeared on the top ten from other countries, followed by **Argentina**, which had two international trades. In number of titles, **Brazil** and **Mexico** each one produced 21 titles out of the 120 most watched productions, while 12 are from **Spain** and 11 from **Colombia**.

The largest number of exports also corresponds to **Mexico**, which had 18 productions among the most watched fictions outside its territory. The second largest exporter is **Brazil**, which appears 17

times in the most watched list of other countries. **Mexico** is also the country that has more co-productions between the audience champions, with three titles – *El Señor de los Cielos 3*, co-production with the **United States**, *La Viuda Negra* and *Tiro de Gracia*, both co-productions with **Colombia**. The most watched co-production was *Signos*, in 63rd position, made by **Argentina** and the **United States**, exhibited in Argentina. There was also a co-production between **Argentina** and **Uruguay** – *Entre Caníbales*.

4. Transmedia reception in Obitel countries

The year 2015 could be considered as a year of exploration, but also as a year of confirmation of the transmedia strategies that have been implemented by the Ibero-American fiction industry. Since 2012, when Obitel began to analyze transmedia reception, it has been possible to observe how industries and TV stations have realized gradually that every transmedia strategy must be led by their interaction and interactivity with the audiences, since it is not just a broadening of consumption, but rather a process of recreating an entire reception experience. This entails admitting that they are mobile, multiscreen audiences that, in turn, produce their own contents; therefore, in order to fulfill this, it is not only enough to connect fiction with social networks, but also it is necessary to create a social network around the fiction.

The transmedia proposals in this sense were widely varied. There is the case of **Spain**, which is perhaps the country where transmedia fiction has been experimented with the most enthusiasm. An example, in 2015, is *El Ministerio del Tiempo* (La1), which narrates the adventures of the workers at a secret ministry created to safeguard the development of Spanish history. This series created an entire transmedia universe whose point of origin was the TV network itself, since it seduced the audiences from a microsite, so that it became a part of the “Basic training course for rookie officials and patrolmen”. In addition, the microsite hosted *La Puerta del Tiempo*, a bimonthly on-line show where the guests are also asked

questions made by the fans. The strategy combined open accessibility to the contents of platforms such as Facebook and Twitter with the restricted accessibility of spaces like Instagram, presented as a “confidential file”. This generated unprecedented participation by the viewers, which manifested in the creation and management of Facebook, Twitter or Tumblr accounts, fanart production (such as fanfics, fanvids and fanpics), podcasts, an automatic certificate generator for fans, merchandising products, etc.

Another country with an attractive transmedia proposal for fiction was **Brazil**, where the contents generated by the users are gaining relevance and repercussion on TV shows. Twitter is the platform that mobilizes the most fiction-audience connection, whether through memes, remixes, fanfics and, above all, hashtags, whose creation is one of the main tools used by the audiences to discuss public interest issues that may be treated in the fiction. That is why TV fiction, according to data by Kantar Ibope Media, was ranked among the most widely discussed topics on Twitter.

The above can be illustrated with the production of *Império* (Globo), which had 18.9 million mentions on Twitter, 550 thousand unique visits, 560 thousand tweets and 133 thousand unique authors participating in the chats. This fiction remained as the most commented on the internet for five weeks.

In **Argentina**, the national fiction analyzed was *Esperanza Mía* (El Trece), which narrates the love story between Esperanza (a young woman who is fleeing and manages to find shelter in a convent and impersonate a novice) and Tomás (the parish priest). The Convento de Santa Rosa, where the nuns live, has a chorus, which Esperanza joins. Music is a constant element in fiction and it accompanies the development of all the stories.

The fans’ activity that accompanied *Esperanza Mía* was intense; however, throughout the development of the fiction, it was confirmed that the fans’ following, with solid participation on networks via postings and comments, was less associated with the fiction than with their protagonists. Halfway through the year, with

the launching of the theater production of the comedy, the couple was prompted, from the social networks, to “go from fiction to reality”, which finally happened. The fans set up the #mariali to post comments on each and every one of the steps taken by the love relationship between the actors. This effervescence that appears on the social networks is centered on the actors rather than on the fiction. This mixture is reinforced by the fact that, side by side with the *telenovela*, the actress launched her career as a solo singer. Thus, the figure of Lali Espósito allows feedback from the fiction scenes, although with less strength than the traction that fiction seems to make towards the scenarios.

In **Mexico**, *telenovela Antes Muerta que Lichita* (Televisa) was the most innovative in its transmedia proposal. It did so from the *telenovela* official page⁸, where 16 applications were launched connected with this melodrama, channeling the attention via social networks.

The official site deployed a series of links, from which it was possible to see back chapters (a maximum of five), photo galleries, media content, behind the scenes and about the *telenovela*. Within the official site, it was possible to watch webnovela *Corazón Enamorado: Novela Dentro de la Novela*. With unknown actors, this is a sub-plot connected with “Lichita’s world”; there were even characters watching some chapters of the webnovela. This had not happened before in any Mexican fiction.

With a similar proposal, network Telemundo, in the **United States**, created a transmedia strategy for the third season of *El Señor de los Cielos*. This TV series is a co-production between the USA and Mexico, specifically between Telemundo and Argos Comunicación. *El Señor de los Cielos* distributed its 104 episodes through six different technological platforms: (1) Facebook, (2) Twitter, (3) hashtag, (4) applications, (5) YouTube and (6) website. These distribution media offered contents from the series side by side the

8 Available at <http://television.televisa.com/telenovelas/antes-muerta-que-lichita/>.

traditional distribution on the Monday-to-Friday TV programming at prime time by Telemundo. One of the main avenues for interaction with the series was the use of Twitter, with the hashtag #ES-DLC3.

In addition, *El Señor de los Cielos 3* offered all of its chapters through its YouTube channel and its official website, which also had its first two seasons. However, the site presented a transmedia interaction of the viewing kind because the audiovisual material could be watched, but the dynamics of feedback with the viewers was not allowed and the prevailing level of interactivity was active.

In 2015, **Peru** offered certain conditions and practices that gradually allowed the emergence of transmedia expansions from some TV channels. The first example was *Al Fondo Hay Sitio* (América Televisión), a *soap opera* that put at the disposal of the viewers the tool “Seamos Amigos”, which allowed its followers to select among four characters to receive text messages directly from them on their cell phones. All of this was presented as if it were a chat’s dynamics, but it was one way only, that is, from the fiction character to the user, without any feedback.

The change of image in **Venezuelan** private channels did not bring about a change in their interactions with their audiences, since interaction with viewers and participation in TV contents have been relegated to just posting comments on social networks Facebook and Twitter, the most widely used in Venezuela. However, it is observed that, in informative and opinion programs, viewers had more interaction, which materializes by asking questions to interviewees in the studio. We see that, for one more year, in regards to fiction, Venezuelan TV channels bet only on social network presence, where they just advertised their contents and showed the “behind the scenes” or “curious information” connected with their productions and actors.

Production and transmedia reception in **Colombia** continues to be a stage under construction, which, as it usually happens with genres and formats, is in a process of transformation marked by the

importance of digitalization and the use of social networks. Cases such as *Lady, la Vendedora de Rosas* (RCN) allow identifying two essential features of the earliest transmedia attempts: appealing to a sense axis centered on intimacy and bringing the fictional discourse closer to everyday life. Such design of their own convergence universe leads the audience to place this relationship between everyday life and what is seen on the screen as the main driving engine to identify with fiction. Additionally, this relationship is seen as raw material for a creative process, one that would change their uses of language with a critical potential that urgently demands greater participation on the part of the producing companies to develop a full interactivity and thus complete that transmedia scenario teeming with resources, but lacking in greater levels of interaction beyond the mere viewing of the contents.

Uruguay selected Turkish *telenovela* *Las Mil y Una Noches* for the study of this topic, which in particular implemented several transmedia strategies aiming at involving the audience constantly, not just through viewing. This strategy had never been adopted for any domestic or imported production. The broadcaster articulated several transmedia strategies from the official page and its convergence with Twitter and Facebook. The channel's website promoted two episodes and made them available as they were being aired. Viewing was provided, but public participation was displaced to Facebook and Twitter, which were administered by the channel itself. The official Facebook page worked thus as a complement to the website the channel provides; it was possible to interact in real time on it, with comments and answers to the broadcaster's publications, but it was not possible to watch episodes.

Ecuador analyzed the transmedia strategy of *Los Hijos de Don Juan* (TC Televisión). Its strategy included the use of social networks such as Facebook, Twitter and Instagram. At this level, it was proved that the account administrators had promoted interaction with the followers of the Ecuadorian *telenovela* by means of photos and videos, which were accompanied by texts that advanced

information about new chapters. At the same time, these materials promoted activities by the actors outside the screen. They prompted the use of hashtags both to generate a sense of identification among the audiences, labeling the name of the production or a relevant moment in the narration – for example, #HueleASuegro, when it is suspected that the teenage daughter of one of the main characters has a boyfriend –, as well as the presentation of issues related with the *telenovela*'s sponsors.

Portugal provided a lesser transmedia offer because their strategies concentrated on making web pages with very little interactivity with the audiences, since the *telenovelas* are not adapted for the internet.

TV fiction in **Chile** during 2015 did not present breakthroughs in terms of transmedia production. Of the 27 new Chilean fiction productions, those corresponding to the main ones in each channel had a fan page on Facebook. The rest did not have a transmedia strategy that translated into content diffusion or an outlet through other content channels, as it had happened in previous years, when the “experience” of following a *telenovela* was complemented with participation by their protagonists on other platforms different from television.

At any rate, the use of Facebook as the show window and interaction space for the *telenovela* or series with its viewers presented some variants. The simplest case is that of fan page generation, with a stock of images referring to the show, followed by posts of the production including a photo and a text that encourages watching the program, through the use of questions that appeal to curiosity about what will happen on that day's chapter.

Table 13. Titles and networks analyzed by the Obitel member countries in 2015

Country	Title	Format	Position in the top ten	Social network analyzed
Argentina	<i>Esperanza Mía</i>	<i>Telenovela</i>	1	Facebook Official web
Brazil	<i>Império</i>	<i>Telenovela</i>	2	Twitter
Chile	<i>Papá a la Deriva</i>	<i>Telenovela</i>	2	Facebook Official web Twitter
Colombia	<i>Lady, la Vendedora de Rosas</i>	Series	2	Facebook Official web
Ecuador	<i>Los Hijos de Don Juan</i>	<i>Telenovela</i>	4	Facebook Official web Twitter Instagram
Spain	<i>El Ministerio del Tiempo</i>	Series	-	Official web
USA	<i>El Señor de los Cielos 3</i>	Series	2	Facebook Official web Twitter
Mexico	<i>Antes Muerta que Lichita</i>	<i>Telenovela</i>	3	Facebook Official web
Peru	<i>Al Fondo Hay Sitio</i>	Soap opera	1	Official web
Portugal	-	-	-	-
Uruguay	<i>Las Mil y Una Noches</i>	<i>Telenovela</i>	1	Facebook Official web Twitter
Venezuela	<i>Amor Secreto</i>	<i>Telenovela</i>	6	Twitter

5. Highlights of the year in Obitel countries

The invasion of Turkish *telenovelas* consolidated in 2015, since as an average three *telenovelas* were premiered in **Argentina, Peru, Mexico, Chile** and **Uruguay**. *Telenovelas* such as *¿Qué Culpa Tiene Fatmagül?*, which had already been released in 2014 in **Mexico** and **Chile**, were followed by the successful *Las Mil y Una Noches*, *Ezel*, *Secretos*, *Nadie Es Inocente*, *El Precio del Amor* and *Karadayi*, which were premiered in the abovementioned countries.

The phenomenon of Turkish *telenovelas*, however, is not exclusive of the Latin American countries, since these *telenovelas* have escalated their exports in the last ten years. In 2015 they grossed profits of 250 million dollars in respect of their fiction exports to 70 countries, which generated 400 million viewers all over the world

and made Turkey the second world exporter of fiction after the **USA** (Stiletano, 2016). One of the reasons for their success is their low broadcast costs, along with good technical quality, resulting in a solution for countries with unconsolidated fiction industries, such as it happened in **Peru** and **Uruguay**, or in **Mexico**, with TV Azteca, which, in view of their low production, has decided to import Turkish and Brazilian *telenovelas*.

In the case of **Argentina**, Turkish *telenovelas* appeared in 2015 reaching high ratings with the six titles premiered. The most successful was *Las Mil y Una Noches*, a *telenovela* that reached 27.7 rating points in its last episode, which is unusual for local fiction, and averaged 19.2 rating points throughout 160 chapters.

In **Peru**, Turkish fictions occupied its prime time and *Las Mil y Una Noches* was the most successful – during its first week, it even aired 90-minute chapters without any commercial breaks. This fiction was followed by *Sila, Cautiva por Amor*, which also showed high ratings and was a strong competitor for the most successful Peruvian fiction in the last few years, *Al Fondo Hay Sitio*.

The strong presence of Turkish *telenovelas* was also felt in **Uruguay**, a country that has historically resorted to fictions from **Brazil, Colombia, Venezuela** and **Mexico**. Nevertheless, in 2015, Turkish *telenovelas* invaded Uruguayan screens. The first *telenovela* imported was *Las Mil y Una Noches*. The irruption of Turkish *telenovelas* transformed the screen in a way similar to what had happened decades ago with the arrival of Brazilian *telenovelas* in **Uruguay** (Sánchez Vilela, 2000).

Chile lived a contradictory 2015. On the one hand, the fall of public channel TVN consolidated. This channel had once been the undisputable leader in the area of fiction. However, Mega, whose new administration was the first to bring Turkish *telenovelas* to Latin America, promised to air Chilean *telenovelas* daily; they not only kept their promise but also managed to conquer the audiences' allegiance. Finally, it is paradoxical that the only channel whose fiction is in crisis is precisely the one that broadcast *Sitiados*, a prod-

uct with a standard that is superior to the average, which we have chosen as the most outstanding fiction product in 2015. *Sitiados* is an eight-episode miniseries co-produced by independent producing company Promocine, Fox International Channels and TVN, with the support of the The National Television Council. Its quality gained the critics' applause and high ratings in Chile, although it was not enough to be included in the year's top ten. It also achieved high performance on pay TV in America and international sales.

This way, the success of Mega goes beyond that of Turkish *telenovelas*. It was at the beginning of 2015 that Turkish production *Las Mil y Una Noches* stopped running. After more than ten months on the air, the first Turkish *telenovela* brought to the country by Mega set up a TV phenomenon: it had an average rating of 28.2 points. Many Chilean television executives thought that Mega's success with *Las Mil y Una Noches* would be a passing phenomenon. However, Turkish productions have been a series of successes. After the first, other followed: *¿Qué Culpa Tiene Fatmagül?*, with 27.5 points as an average. Even when Mega used this *telenovela* with the tactic of a flexible time slot to support its own production, *Fatmagül* was a very noble product because it resisted the mistreatment it received due to several time changes to support new Mega productions. Good results were followed by *Ezel*, *Sila* and *Karadayi*.

The case of **Mexico** is different from the rest of the countries because their success, though it did not secure a spot in the top ten, allowed the TV station that aired them, TV Azteca, to maintain higher ratings than with their own productions. Turkish *telenovela* *¿Qué Culpa Tiene Fatmagül?* obtained between 8 and 9 rating points.

Following with a scenario of internationalization, **Portugal** stood out for employing a new production model that entailed broadcasting *telenovela* *Única Mulher* (TVI) at the same time in Portugal and Angola. This was a veritable success because it did not only entail a matter of broadcast but also one of production; actors and directors from both countries participated and thus a new business model was set up between the two countries.

On another stage, **Ecuador** continued to depend on fiction import in view of a crazy industry that, though it has kept growing in the last few years, has not reached the necessary levels to maintain all the fiction programming slots on its own. Ecuavisa included six *telenovelas* and two sitcoms produced by them in its top ten. Four of the *telenovelas* are Brazilian and two of them take the first spots; the sitcoms are two of the three the channel produced: *Así Pasa* and *3 Familias*, a series that ranked second the previous year, but in 2015 it dropped to eighth. TC, in turn, presented *Los Hijos de Don Juan*, the only *telenovela* it made this year, which obtained an honorable fourth place.

Contrariwise, **Colombia** returned to its roots and used as a reference for its fictions not the plots about drug traffic but rather its popular culture. One of its most successful *telenovelas*, for example, was *Diomedes, el Cacique de la Junta* (RCN), which tells the life of Diomedes Díaz, one of the most famous Colombian popular music singers. The same tendency was followed with series *Lady, la Vendedora de Rosas* (RCN) and *Las Hermanitas Calle* (Caracol), which portrays the socioeconomic problems afflicting Colombians today. This “turning to their roots” meant a change in Colombian narratives that had become so loaded with the topic of drug traffic, the so-called *narconovelas*, in the last few years.

Brazil, amidst the celebration of Globo’s 50 years, since this network is the main fiction producer in the country, underscored the innovation experienced by its fiction industry, which has been strongly promoting the creation of series since 2012. In 2015, the most outstanding series were *Os Experientes*, which Globo co-produced with O2 Filmes, and *Odeio Segundas* (GNT), but there were also productions with a religious subject matter, such as *Milagres de Jesus* and *Os Dez Mandamentos* (Record).

As part of Globo celebrations, program *Luz, Câmera 50 Anos* was aired by means of which some of their series and miniseries were adapted to the telefilm format. In total, 19 telefilms were produced and broadcasted in this format. Their intention was to present

Globo's big moments through its fictions; that is why they launched an album with stamps to remember Globo's 50 years of telenovelas. This brought about a veritable frenzy among Brazilian audiences.

In **Spain**, the most outstanding event in 2015 was the success enjoyed by the police fiction produced by Tele5, *El Príncipe*, which had over 4.6 million viewers and 24% of share. It was a series set in Ceuta and articulated around the fight against Yihadist terrorism. This production led the ranking for the second year in a row and placed six of its ten episodes among the 50 most viewed broadcasts in 2015.

This traditional formula that mixes the police and thriller genres was also present in the viewership results attained by the four titles ranking among the ten most watched in the year: *Mar de Plástico* (3,643,000 viewers and 21.4% of share), *Bajo Sospecha* (3,640,000 viewers and 18.9% of share) and prison thriller *Vis a Vis* (3,547,000 viewers and 19.9% of share), by Antena 3, in addition to the above-mentioned series, *El Príncipe*. These productions paved the way for Spanish fiction in Far East, Nigerian and Iranian markets.

The **United States** also experienced an important change in the Hispanic TV industry in 2015 due to the fact that Univision and Televisa consolidated their relation and reached a new programming agreement, which will last until 2030. In addition, they made modifications to Univision's capitalization, in which Televisa will have common stocks with approximately 22% of voting rights. Contrariwise, Fox International Channels sold its 50% participation in the Colombian network RCN to be renamed as MundoMax. MundoMax thus becomes the third network with ownership of a Latin American corporation, after Azteca, owned by TV Azteca, and Univision, in which Televisa maintains an important ownership percentage.

Finally, on the political-social scope, both **Venezuela** and **Mexico** experienced repression and censorship that were determinant on their media scene. Venezuela, as a result of the socioeconomic crisis it suffered during 2015, continued to undergo censorship and

control of its contents in all the media. However, Radio Caracas Televisión – a channel whose concession was withdrawn by the Venezuelan State in 2007 –, at present, works as a producing and content distribution company at an international level, since, due to several juridical and political decisions, it cannot air its contents on an open signal or by subscription television. During 2015, this company, now called RCTV Producciones, produced *Piel Salvaje*.

During 2015, **Venezuelan** president, Nicolás Maduro Moros, reiterated his view about private television in the country, which, according to him, broadcasts superficial, negative contents. The political line aims at implementing the proposals outlined in 2014, which were to be executed by the Promotional Committee of the New Venezuelan Television, so as to promote peaceful coexistence and peace. For the president, the new television will only be possible with the creation of contents under the modality of National Independent Production. It is believed that, with the participation of national and foreign talent, series and *telenovelas* will be created to face television violence. Their results remain to be seen.

Mexico, in its national media context in 2015, was marked by unprecedented contrasting events in the country's recent history, from the media, political and particularly "fictional" viewpoints. One of them was the refusal of the public media to cover the elections held in some states, for example, Jalisco, which no doubt violated the citizens' right to information.

Another event that upset the political and fictional world was the capture, escape and recapture of drug lord El Chapo Guzmán. Even though it was all real, it seemed like a big fiction whose script was followed by all involved: El Chapo himself, his Sinaloa Cartel comrades, as well as the prison guards and the other police and security officers that were more or less close to this character. The news story was gradually told in episodes until his full escape was shown in all its intricacies. It was later disclosed that El Chapo wanted to make a movie about himself and, to that end, he was in touch with Kate del Castillo, the star of *telenovela La Reina del Sur*, who would

then be able to get her second starring role, alongside El Chapo, in another narconovela if he had not been recaptured.

6. Theme of the year: (re)invention of TV fiction genres and formats⁹

The concept of television genre refers to a conventional classification whose objective consists in organizing a large bulk of content in smaller categories. These conventions are recognized, assimilated and shared among academic researchers, professionals and TV viewers. However, these dividing marks are not always easily identifiable because genres are not presented in an immovable way. They suffer constant evolution and, therefore, a theory of genre cannot be considered as a series of fixed laws, but rather as a system to organize a permanently open context for debate, discussion and critical interpretation.

It is worth noting that, since the 1980s, theory of television genre has been analyzed with disbelief by poststructuralist and post-modernist scholars once it subjects content, texts and fiction productions to the delimitations of rules and systems.

The concept of genre in theory and practice arises, changes and declines for historical reasons. Each genre is composed of texts that accumulate, that are grouped as a process, not as a specific category. The genres are open categories. Each element changes the genre to add, contradict, or promote changes in its constituents [...]. The processes by which genres are established always involve the human need for distinction and interrelationship. Since the

⁹ The base document for the *Obitel 2016 theme of the year: (re)invention of TV fiction genres and formats* was in charge of Juan Piñón (NYU), with the contribution of Giuliana Cassano, James Dettleff (PUCP), Guillermo Orozco, Gabriela Gómez and Darwin Franco (UdeG).

purpose of establishing the critical genres vary, it is clear that the same texts may belong to different groups of genres, serving for different general purposes (Cohen, 1986:204 in Creeber, 2008:2).

Steve Neale (1990) argues that the two most important factors to identify a genre are the expectations and the verisimilitude once the genres are part of specific hypothesis and expectations by the TV viewers. Therefore, it is essential to promote discussions about the definitions of genres as an object of study, since they are historically related to the context. For the author, the definition of genre in the case of television tends to become complex because this media adopted and adapted genres and formats from different medias, such as radio, cinema, literature, journalism, music and other forms of artistic expression. Thus, the notion of television genre reveals a generic overview from all fields of cultural production, together with its hybrid condition formed by multidimensional overlapping and, at the same time, introverted by nature.

Martín-Barbero (1993) argues that genre is the place where the osmosis between cultural matrices and commercial formats happens. The concept of genre would be, therefore, a communication strategy, namely, a way of understanding and organizing competences both of the senders and receivers.

In the same way goes Mittell (2004a:175) by asserting that more than the genre *per se*, the question relates to cultural processes which mean that both genre and format are social constructions and, in many cases, expressions of hierarchy of taste (Bourdieu, 2010). To Mittell, we must look beyond the text, as the *locus* of a genre, and find a genre within its complex interrelation between texts, industries, audiences and historical contexts. It is in this interrelationship that are found executives of television stations, producers and creative personal, marketing and advertising professionals, sponsors, critics, scholars, audiences and fans of this kind of genre.

In times of change, mediascape imposes that we observe the new audience practices and how they affect narrative dynamics and genres rules. Dialogue and mediations have never been so necessary.

With these background considerations we move on to the characteristics of television formats and genres in *Obitel* countries. In what follows we present the conclusions of each country and their analysis of formats and narrative strategies, stylistic conditions, modes of production, industrial dynamics, genre as strategy and genre as the result of consumer habits and as interaction between audiences and producers.

In 2015, we observed again that, in terms of long seriality narratives, *telenovelas* are the most representative in the Ibero-American context. They also are known and recognized by their melodramatic structure. They usually feature more than 100 chapters and, according to Martín-Barbero (2004), they express different cultural patterns, such as literature, circus, theatre, radio and cinema. Originally from Cuba, *telenovela* was appropriated by Latin American space as a national and hegemonic expression, with different narrative and thematic characteristics in each country. According to Mazzioti (2010), in Mexico, the *telenovela* focuses on universes of justice and moral reparation; in Brazil, it holds an agile and colorful model, with a permissive moral; in Colombia, it articulates humor and irony to combine the traditional and the modern; in Argentina, it explores a magic, modern and young sense; and Venezuela had a transition from classic melodrama to realist *telenovela*. Therefore, in this generic overview of the *telenovela* as melodramatic genre, apart its hardcore, it is worth highlighting the specificities and diversifications that it ended up adopting, especially in Brazil, where *telenovela* is recognized as a “narrative of the nation” (Lopes, 2009).

In **Argentina**, the classic *telenovela* format dominates, but, since the growth and consolidation of a multiple screens environment, television began to experience other strategies such as social network programs and websites. The attempts to adapt national tele-

vision fiction as a global narrative style in open TV programs did not succeed. Neither did the attempts to conquer part of the audience with fictions planned for multiple screens, for they involved abandoning traditional aesthetics, usually accepted. We are living, thus, a moment of transition. Concerning the formats, the long stories such as *telenovelas* are not able to acquire economic support and the betting have been to formats such as miniseries, with few chapters, or even *unitarios*. Integrating elements of global narratives into modes of fictional tradition is a modest model of action, but it is currently the one showing more advantages to Argentinian television.

Brazil designed in 2015 a scenario favorable to the development of an unseen season of aesthetic experimentation by TV fiction creatives. It was during this period that two of the best examples of the balance between serial and series appeared. *A Regra do Jogo*, by João Emanuel Carneiro, aired at 9 p.m. by Globo, is a *telenovela* that brought an explicit tension between chapter and episode: each chapter was numbered and received a title that alluded to happenings of the day. On the other hand, *Verdades Secretas*, written by Walcyr Carrasco and aired at 11 p.m. also by Globo, has managed to use the *telenovela* format in the development of strong hooks at the end of each chapter, which can be associated to the series format with regard to the chaining of dramatic actions. The speed of the plot with shorter duration and aesthetic quality, obtained by the direction, showed that the combination and recombination of known genres and formats in experiments with new narrative possibilities is currently a global trend, connected to sociocultural and technological transformations. In these *intergenre* and *transgenre* dynamic, formats can be transfigured even more due to their condition of productive device. Therefore, television genres that succeed the most seem to be the ones that cover both singular (local) and universal (global) context, without ever losing sight from cultural practices.

In **Chile**, since the 1990s, there has been a consolidation of its own *telenovela* scheme of production. The main changes occurred on the mix of genres and on the improvement of production, espe-

cially in photography. On the other hand, the Chilean production has not reached expressive audience levels. The main transformations regarding genre and formats are the excessive use of drama out of the fictional scope, especially in children TV programs, reality shows and news. An example of multiplatform exploration was *telenovela La Casa de al Lado* (TVN, 2010), which had the content's creation for many platforms, like webseries and webcomics, blogs and characters' profiles on Facebook, besides several contests that promoted creative interaction by which the audience sent videos with the *telenovela*'s choreographies. However, the year 2015 was complicated for the Chilean television industry, damaging productions and innovations, due to the channels economic crisis. With the Turkish *telenovelas*, Mega was able to open new fiction markets, revitalizing the traditional narrative, that is, with lots of melodrama and stereotype characters. There was also emphasis on family comedy genre.

In **Colombia**, an important transformation relating to genres and formats is taking place, caused by the presence of new scenarios and platforms for television consumption. That transformation is carrying on changes in production and reception indicated by the new ways of assistance and appropriation, shaped by the immediatism of new audiovisual platforms available to the audience, such as Netflix and other streaming systems. The *telenovela*, main fiction format during years in Colombia, has been gradually replaced by series, as could be seen in the highlight of the year of this country. The reasons for that transformation could be the series agility and the versatility they proportionate for the audience, when compared to Colombian *telenovelas*. One of the remarkable characteristics of the series produced by the country is the biopic preponderance, like *Escobar, el Patrón del Mal* (2015) and *Narcos* (2015, American, Brazilian and Colombian co-production), both from Netflix, which demonstrate the hybridization of cinema and television, on technical and narrative levels. They also combine characteristics of multiple storylines of action series with private life, added to the exploration

of relationships increasingly closer to everyday life. Nonetheless, there is also the exaltation of myths and legends, especially in productions in which it is not clear if they are series or *telenovelas*, like the cases *El Capo* (RCN, 2010), *La Selección* (Caracol, 2014) and *Las Hermanitas Calle* (Caracol, 2015-2016). It is also worth noting the production of webseries, as *Del Otro Lado* (Indiana Films, 2015), the many efforts from public television to renovate the language and the use of new techniques in fiction due to the demand for more interactive relationship with the audience, which is unquiet as an observer-creator in a multiscreen media ecology.

Ecuador highlights the formats in transformation, especially from the *telenovela*'s passages to comedy series, present in some pieces of great repercussion in the country for the last few years. More than technical changes and/or production, more than aesthetics and narrative syntaxes changes in the formats or in the chapter's size, the changes are emerging in the way humor is approached, in the less stereotyped characters and with less manichean and more truthful lines. Defying creativity and the use of verbal language is the strategy proposed by the Law of Communications. This (re)invention of television fiction genres and formats finds its recent examples in two series produced by Ecuavisa, based in two *telenovelas*, which acquired high levels of rating: in 2009, *The Bakery* (derived from *El Secreto de Toño Palomino*, 2008), and, in 2011, *El Combo Amarillo* (extension of *Rosita, la Taxista*, 2011). These examples, together with the economic factors which aim to preserve advertisers and reduce productions costs, had been important to the "transformatization", concept related to these narratives and discursive changes.

About the trends in the production of genres and formats in **Spain**, the common denominator consists in the cultural proximity and the search for satisfying a heterogenic audience. In this sense, an authorial fiction was chosen, series *El Ministerio del Tiempo* (La1), of Pablo and Javier Olivares brothers. The series opts for the use of hybridism between science fiction, fantasy and adventure.

The aim is to attract young people for public television with an educational and transmedia production, performing in mystery key a didactic fantasy on the history of Spain. The wide and varied public impact of the phenomenon that was this series can be exemplified by the following indicators: 1) the renewal of the series through on-line mobilization generated around the hashtag #TVRenuevaMdT. The falling back of linear television among young people globally justified the modest rating obtained under the traditional measurement system, but the social buzz generated on the social networks followed weeks on and the number of on-line views confirmed the new television consumption habits of the Spanish society and the need to question the representativeness of the current audience measurement system; 2) it exceeded the virtual boundaries to reach the classrooms of secondary and higher education, as each episode offered material related to courses; 3) the number of awards, such as the seven Goya awards and 30 others, such as the critical prize of FesTV al for best fiction of 2015, for best original script and for narrative innovations, besides the best director of television series award by Gold Panda Awards; 4) the international repercussions could serve as an example for other countries to adapt their national histories to a fiction format.

The **United States** highlights the advent of the super series as the biggest change in terms of (re)invention of genres and formats. This new category has grown in a moment when *telenovela* audience was impaired by the growing consumption of VoD and streaming platforms. The super series are configured as shorter productions, with a lot of action scenes, strong narratives, improvement of television aesthetic, more realism and less melodrama. *El Señor de los Cielos* (Telemundo/Argos, 2013-2015)¹⁰ is a good example of these productions, since it had great results in rating and in VoD. In its third season, this super series had 104 episodes, against 74 in the first and 84 in the second, marking, therefore, the consolida-

¹⁰ *El Señor de los Cielos* is a co-production between Caracol TV, Telemundo and Argos. However, its second and third seasons were co-produced only by Telemundo and Argos.

tion of these hybrid productions and showing what is called of “the third golden era” of the United States television. Concerning co-production, the country has not always achieved great results in these formats. As an example, *Dueños del Paraíso* (2015), a Telemundo and Chilean TVN co-production, got lower audience rates. However, *Señora Acero* (2014), from the same producers, was successful. Another phenomenon observed was the change of the nomenclature *telenovela* to series, which happened due to the cultural status that the name ‘series’ holds today in the country. It is also a marketing strategy to attract new viewers to fiction, as the young and the male, further the search for a more informed and educated audience.

In **Mexico**, transformations on the *telenovela* format have taken place since its first run in 1958. And after several experiments, successful or not, there was the consolidation of its own style of storytelling, which has become a hallmark of a classic model of *telenovela*. There is usually a love story with a woman who suffers and a villain or villainess who tries to hinder in any way the life of this suffering woman, as is the classic example of *María Isabel* (Canal de las Estrellas, 1998). However, in the last ten years, digital convergence in the country has meant that public and private television transformed the way of telling, developing and producing stories in order not to lose audience. Thus, some changes were conducted since 2005, such as: the exhibition of foreign *telenovelas* at prime time; the production of series, like *Sofía Luna, Agente Especial* (Once TV, 2015); the inclusion of realistic themes; the increase of the number of chapters of *telenovelas*; the naturalization of advertising in fiction; social merchandising and the extent and consumption of content through second screens enabled by the transmediation in *telenovelas* *Lo que la Vida Me Robó* (2014) and *Antes Muerta que Lichita* (2015-2016), both from Televisa.

National television industry in **Peru** is highly mutable, as it reacts quickly to the market’s dynamic and audience expectations. Progress and setbacks are directly related to political changes, economic crises and links with governments. New genres and television

fiction formats coexist with traditional forms. Hence, we have the possibility of interactivity and community building from the use of social networks coexisting with traditional television and its passive consumption. Despite the existence of mobility to other screens, the ritual aspect of watching television every day at home continues to dominate, even if the stories are changing. For this reason, we are already witnessing the Peruvian television industry and its directors referring to their products as *serial novelas*, *miniseries by seasons* and *mini-telenovelas*.

Portugal shows that the reinvention can create school and set standards. Through the simultaneity of episodic and serial dimensions, the stories began to be rolled out in parallel and independently. This allows the viewers to see the product as a whole, but also the characters and plots that interest them the most. In this sense, the market requirements such as not setting time slots for transmission have also led to the need of working with different genres simultaneously, giving rise to a format more distant from the classical melodramatic structure of *telenovela* and approaching to a kind of “container”. Products of 2015 such as *Mar Salgado*, *Coração d’Ouro* (SIC) or *Única Mulher* and *Santa Bárbara* (TVI) use drama and comedy, but also mystery or even police thriller, within the same narrative, contributing to the production of less typified and more interesting structures. It is estimated that, within five years, the national fiction market will suffer changes due to the boosting of formats and genres, a critical factor to its positive development, whether it is in the number of titles, the number of hours, or in the establishment of a star system internationally recognized, enhancing the circulation of products.

In **Uruguay** the dominant formats are series, miniseries and *unitarios*. However, television fiction in the country is still not able to survive by itself. In the combination of educational content and webseries, it was possible to note a way of mixing genres and create new productions. The genres that stood out were the fictional and the educational, especially spy narratives with interviews and docu-

mentary discourse. The examples were the *Paleodetectives* (2015) and *Los Artistonautas* (2015) – children’s programs aired by public channel TNU that present hybridization of formats. The Uruguayan production has been fundamentally highlighted on the internet, in the form of independent productions, in which it is possible to see a lot of contents that blend documentary and humor, forming the *mockumentary*, text with documentary features that incorporates elements of humor to create a parody of a given subject. However, those productions transgress the rules of fiction and documentary to give rise to a new genre.

In **Venezuela**, the reinvention of genres and formats is highlighted in three fundamental aspects: the inclusion in the telenovela, of increasingly complex and multidimensional characters; the inclusion of social issues, especially related to female gender (for example, breast cancer, domestic violence, eating disorders, etc.); and the hybridization of the format by incorporating thriller as a genre. The main example of hybridization in recent years is *Voltea pa’ que Te Enamores*, a Venevisión’s *telenovela* directed to all kinds of audiences and present in the top ten of 2007 in its first broadcast, then rerun in 2011, 2014 and 2015 at different time slots. This *telenovela* is hybrid because is structured with small intrigues and conflicts that are solved episodically and are announced to the audience at the very beginning of each chapter. About the narrative strategies and the issues addressed, it is considered a melodrama that tells the story of several women living their everyday life in a very distinct way. And even if each woman shows the peculiarities of the human being, the plot also expresses points of convergence, love being one of them, indispensable in every *telenovela*.

After summing up, we look back on some recurrent points in the analysis of each one of the 12 Obitel countries, which give us subsidies to some comparisons and conclusions.

The *telenovela* remains as the main Ibero-American television narrative with long seriality format. However, we also have the increase of multiple screens, as well as the growth of VoD. The

rise of streaming services is observed clearly and consistently in **all 12 Obitel countries**. The new audiovisual platforms enable a new way of watching TV fiction. Some productions are already made especially for this type of display, such as the Brazilian, American and Colombian co-production *Narcos* (Netflix, 2015). Still on co-productions, these products demonstrate the hybridization between television and cinema on technical and narrative levels, with the **United States** being the country that most participated in this type of production. Besides *Narcos* (2015), this country participated in two other co-productions, *Señora Acero* (2014) and *Dueños del Paraíso* (2015), by Telemundo and Chilean TVN.

Original content for the internet and other strategies used as means of dissemination, propagation and sharing of content, especially offered on the website of the broadcasters, mark in a complementary way, and not in a substitutive one, the main content of the open programming grid. **Uruguay** produces webseries and web-comics, and the productions from **Chile** circulate through blogs of *telenovela* characters. The characters' profiles on Facebook show an attempt to get closer to the viewers and get feedback about the *telenovelas*. These strategies were also present in **Argentina, Spain, Brazil** and **Mexico**.

The **United States** highlighted the emergence of super series as a strong trend for future production. Thus, we observe variation in trends on the *telenovela* format, either for stories with fewer chapters or for strong themes (violence, prostitution and drug trafficking), and also combining, in the same plot, chapters and episodes – something noticed in **Brazil** with *Verdades Secretas* (Globo, 2015). The shift between serial (*telenovela*) and series (series and miniseries) seems an increasingly usual movement. Such changes are intended to create new audiences that are not always interested in the *telenovela* traditional format.

As well as the reduction of chapters and the transposition of nomenclature, the increase of series and miniseries is seen in **Argentina, Peru, United States** and **Uruguay**.

Since Obitel Yearbook 2010, we have been emphasizing the television narrative spreadable into multiple screens and its possible outcomes. And in this Obitel Yearbook 2016, we are validating some trends, such as the diversification and hybridization of genres and formats in television fiction. These changes must be growing, sometimes due to marketing strategies to create attractive and profitable narratives, sometimes due to structural changes in the modes of storytelling.

Ultimately, the reinvention of genres and formats seems to respond to new forms of audience consumption, both from the point of view of *transmedia engagement* as *transmedia distribution* (Evans, 2011). At the same time, those reinventions become a key phenomenon for the extension of television fiction on the network and confirm the bet of transmedia fiction television. It is up to us, however, to be alert to these reinventions in order to understand them, especially when they can influence the fictional productions that are to come.

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SECOND PART

FICTION IN OBITEL COUNTRIES IN 2015

1

ARGENTINA: NATIONAL FICTION DROPS, FOREIGN FICTION GROWS AND, NONETHELESS, FICTION LOSES SCREEN

Authors:

Gustavo Aprea, Mónica Kirchheimer, Ezequiel Rivero

1. Argentina's audiovisual context in 2015

Year 2015 was a bad year for fiction in Argentine television. The usual premiere production levels drop in terms of amount of titles and broadcast hours, spaces partially substituted by foreign fiction. All the fiction space steps back in favor of the shows that lean towards political issues, since 2015 is an election year.

1.1. Open television in Argentina

Argentina's open television system consists of five networks with national coverage. Televisión Pública is part of the public media system and does not depend on investments in advertising as its main source of funding. The other four networks are managed privately. The Digital Broadcast Television (TDA, in Spanish) has been operating since 2010 and covers 85% of the country through 82 antennas with 16 nationwide-scope networks. All national networks of broadcast television run through TDA, except for El Trece.

Chart 1. National open television networks in Argentina

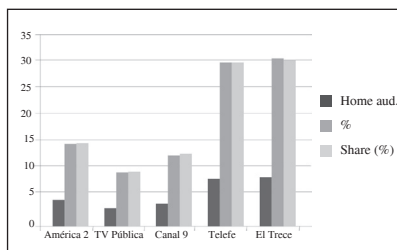
PRIVATE NETWORKS (4)	STATE NETWORKS (1)
América 2	
Canal 9	
Telefe	
El Trece	
	Televisión Pública
TOTAL NETWORKS = 5	

Source: Obitel Argentina

Three of the networks reach the entire country through their pertaining systems of affiliates: Televisión Pública, Telefe and El Trece. Televisión Pública is the network covering the greatest proportion of the national territory (99.5%). El Trece and Telefe cover all the provinces through direct ownership of or association with the main local networks. The five national networks broadcast their programming to the entire country through cable television, which is managed privately. Televisión Pública is under the charge of the board of directors of Radio y Televisión Argentina, Sociedad del Estado (RTA S.E.). Tristán Bauer was the president of RTA S.E. and Martín Bonavetti was its managing director between years 2008 and 2015. América 2 forms part of América Medios group, which is the property of businessman Daniel Vila, of Grupo Uno, which owns six newspapers in the countryside, 16 radio stations in the whole country and two cable networks devoted to information. Liliana Parodi is the programming manager since 2013. Canal 9 is an integral part of Albavisión international group, owned by Mexican Ángel González, which runs ten television networks in Central and South America. In Argentina, Albavisión also exploits the radio broadcasting station La Red. As from year 2013, Diego Toni is the content manager of Canal 9. Telefe is owned by Telefónica de Argentina, a subsidiary of the Spanish company bearing equal corporate name. In Argentina, the group carries out activities related to landline and mobile telephone as well as internet services, and it is associated with several owners of domestic broadcast television networks. Since 2011, Tomás Yankelevich is Telefe's global content manager. El Trece is exploited by Clarín holding, a group that owns newspapers, broadcast TV networks and cable TV networks throughout the country, a digital TV company, internet service providers and websites, and that co-owns a news agency, the only factory manufacturing newsprint paper and also a significant number of companies which are not related to mass communication media. Adrián Suar is, since 2001, the programming manager of El Trece.

Graph 1. TV audience and share by network

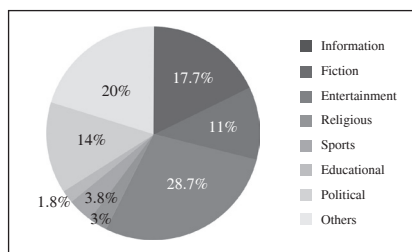
Net-work	Home audience	%	Net-work	Share (%)
América 2	4.3	15.2	América 2	15.3
TV Pública	2.8	9.7	TV Pública	9.7
Canal 9	3.7	13.0	Canal 9	13.2
Telefe	8.6	30.7	Telefe	30.6
El Trece	8.8	31.4	El Trece	31.2
TO-TAL	28.1	100		100



Source: Kantar Ibope Media and Obitel Argentina

Graph 2. Offer by genre in TV programming

Genres broadcast	Total hours broadcast	%
Information	7405:10	17.7
Fiction	4391:50	11
Entertainment	12186:45	28.7
Religious	1208:55	3
Sports	1595:50	3.8
Educational	778:25	1.8
Political	5802:10	14
Others	8438:40	20
TOTAL	41807:05	100



Source: Kantar Ibope Media and Obitel Argentina

In 2015 there is a tie as far as audience is concerned between the two leading networks: El Trece and Telefe. The latter loses its leadership for the first time in five years. Televisión Pública continues to be the least chosen network. There is an increase in live programs (entertainment returns to the screen by the hand of *Big Brother*, in addition to classic *Show Match*) and in debate shows. This way, half the space for fiction on screen is reduced.

1.2. Audience trends in 2015

In 2015, an electoral year, the political information spaces prevailed and the debate programs diverted their subjects from the scope of entertainment to the one of information and politics. Generally speaking, although the information offer drops (it goes from 34% in 2014 to 17.7% in 2015) and is limited to news shows, the political and debate shows expand – which go from a total absence in 2014 to 14% in 2015 –, thus reaching 31% of the programming. The widening of the political debate displaced one portion of the fiction premiere spaces (from 20% of the programming to 11%). *Telefe* and *El Trece* remained the networks that achieved the highest audience levels. *América 2* reached the third place in the rating, with an offer focused on entertainment and political information. *Canal 9* specialized in entertainment and fiction, especially with Ibero-American productions.

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

The investment in advertising between January and December 2015 was 48,439 million pesos, which represents an increase of 40.5% compared to the previous year. Television as a whole (open TV and pay TV) in the Federal Capital and countryside concentrated 23,419 million pesos, 49.6% of the advertising pie.

In physical volumes, the entire advertising market showed in 2015 an increase of 2.2% over the previous year. The five broadcast networks headquartered in Buenos Aires have broadcast 17,467 millions of seconds of advertising, 5.4% more than in 2014. With these figures, the Capital City open TV attains its best score in the last eight years. Pay TV, in turn, has broadcast 58,792 millions of seconds, registering an improvement of 6.7%. The internet share in the total advertising investment in Argentina during 2015 was 20.4%, which means a growth higher than 4% compared to the previous year, according to data from the Argentine Interactive Advertising Bureau (IAB).

1.4. Merchandising and social merchandising

In the sequels of the 2014 successes *Viudas e Hijos del Rock & Roll* and *Guapas*, the merchandising related to music and mobile phones remained during the summer. The most successful local fiction in 2015, *Esperanza Mía*, boosted the singing career of its female protagonist Lali Espósito and the sales of its merchandising from social networks.

Social merchandising had its place in some of the productions supported by the National Institute of Cinema and Audiovisual Arts (Incaa, in Spanish): the miniseries *El Mal Menor* (childhood problems) or *Presentes* (matters related to adolescence).

1.5. Communication policies

During 2015, the outgoing government maintained its legal confrontation with Grupo Clarín regarding its adequacy to the Law on Audiovisual Communication Services. Around the middle of the year, the Executive Branch regulated the Law called Argentina Digital, passed at the end of 2014, which regulates the telecommunications market and designated its competent authority. Finally, after the launching of the second geostationary satellite manufactured in the country, the Congress passed the Argentine Law of Satellite Industry Development, which defines a plan for the period 2015-2035.

The taking of office of the new national government on December 10th, 2015 marked a significant turn in communication policies. Soon after taking office, President Macri passed a series of Necessity and Urgency Decrees (DNU, in Spanish) that significantly changed the laws regulating the communications sector. First of all, he created the Ministry of Communications (DNU 13/2015) and transferred to its scope the main powers of the Federal Authority of Audiovisual Communications Services (Afsca, in Spanish) and the Federal Authority of Information Technologies and Communications (Aftic, in Spanish) –competent authorities of the Law on Audiovisual Communication Services (n. 26,522) and the Argentina

Digital Law (n. 27,078) –, despite the fact that both laws set forth the autarchy of both organizations.

The substantial changes were made through Decree n. 267/2015, which created the National Authority of Communications (ENaCom, in Spanish), which substituted the preexisting authorities. The decree modifies key sections of both laws since, among other innovations, it widens the limits for concentrating licenses and extends their exploitation terms, facilitates the transfer of licenses among companies and authorizes the entry of audiovisual companies to the telecommunications sector. Besides, the same decree redefines the pay TV service as an ICT service, which places it beyond the scope of the Law on Audiovisual Communication Services, leaving obligations such as the mustcarry¹ of signals without effect. In turn, the ENaCom filed all the adequacy plans to the law of different media groups.

The text of the decree states that the scenario opened by technological convergence makes it imperative to update the legal frameworks and to redesign the institutions that control and apply the laws of the sector to adapt them to the new times. For this purpose, the decree forms a Parliamentary Commission that will draft a new bill for the Reform and Unification of the current laws regulating the audiovisual and the telecommunications markets separately. For several specialists, it is instead a try to take the legal scenario back to the moment prior to the passing of the Law on Audiovisual Communication Services in 2009. Therefore, former officials and civil organizations submitted legal challenges to the communication policies of the new government. Upon a petition from the Office of the Audience's Advocate and from academic institutions, the Inter-American Commission of Human Rights of the Organization of American States (OAS) called an audience regarding "freedom of speech and changes in the Law on Audiovisual Communication Services in Argentina".

¹ Concept taken from the US Federal Communications Commission according to which cable television suppliers must include in their signal every local network holding a license.

1.6. Information and Communication Technology (ICT) trends

In 2015, 67% of homes had access to computers and 61.8% to internet, in average, at the national level. However, a wide gap may be observed between the network's penetration in the city of Buenos Aires (76.6%) and the rest of the urban conglomerates, with an average of 61.2%.² By the end of the year there were 34,785,206 internet users in Argentina; that is, 80.1% of the people had access to the network, being the country with the highest penetration in South America.³

It is estimated that, during 2015, 11.8 million mobile phones were sold, 30% of which were line-free devices. In 2015, there were 62.8 million mobile lines technically in service, which represented a penetration of around 150%. However, lines actually in use were 38 million.⁴ The Android operating system concentrated 83.6% of the mobile devices market, followed by Windows, with 7.7%. iOS, the operating system of Apple, a company whose products are not traded directly in the country, represented 4.1% of the market.⁵

The video consumption through internet grew 66% compared to 2014. According to data from ComScore, Argentines spend 11.1 hours per week watching digital videos, behind Mexico, Colombia and Brazil. In 2015, 7.2% of the homes with pay TV were subscribed to some over-the-top (OTT) video on demand (VoD) service such as Netflix.

The users' participation on Twitter, Facebook and Instagram, measured in millions of actions, grew 89%, boosted by the intense electoral timetable of 2015. The leading social network is Facebook, with 27 million active accounts, followed by Twitter, with 11 million profiles created.

² National Survey regarding Access and Use of Information Technologies and Communication.

³ Internet World Stats.

⁴ Argentine Mobile Market 2016 Report, by Carrier & Asociados Consulting Firm.

⁵ Argentina's Digital Future 2015 Report, by ComScore.

1.7. Public TV

In December 2015, the new government created, by means of Decree n. 12/2015, within the powers of the Office of the Chief of Cabinet, the Federal System of Public Content and Media. The resolution provides that the new organization, which works with the same rank and powers as a ministry, is in charge of: the direct administration of RTA (Radio Nacional, Canal 7 and the news agency Télam); the park Tecnópolis and Kirchner Cultural Center. It also has direct intervention in the public signals Encuentro (educational), Pakapaka (children's) and DeporTV (sports), currently within the powers of the Ministry of Education and Sports, in the Advisory Council of Digital Broadcast Television and in the Argentine Audiovisual Bank of Universal Contents (Bacua, in Spanish), which hosts audiovisual content produced with State support. This way, areas and projects which up to that moment operated in different state agencies are transferred to an exclusive sphere. In its whereas clauses, the law states that reorganization aims at "improving the use of public resources", based upon "reasonableness and efficiency" criteria.

Among the changes occurred during the year, the state public sector has innovated in the distribution of audiovisual content through the internet. By the end of 2015 the state-owned company of satellite solutions Arsat and the National Institute of Cinema and Audiovisual Arts (Incaa) introduced Odeón, an over-the-top (OTT) video platform which offers movies, series and national documentary films on demand. In turn, RTA S.E. did the same and launched Prisma, a web page that offers on-line access to portions of the company's audiovisual historical archive.

1.8. Pay TV

The penetration of pay TV in 2015 was located at 83.46% of the homes, showing a drop of almost 4% with respect to the previous year, where it reached the highest figure of the last ten years. The amount of homes with pay TV reached 4,229,728; that is, 90,832 less homes than in 2014. The downward trend in the amount of sub-

scribers is in line with what happens in other markets, especially those which reached maturity, where there is a high penetration of internet-based audiovisual consumption services such as Netflix. Continuing with a trend registered for the first time in the previous year, during 2015 the annual average share of the whole pay TV service exceeded once again the one of broadcast television, with 53.18% versus 46.82%.⁶

Cablevisión, the cable TV company controlled by Grupo Clarín, concentrates more than 40% of the market, followed by Supercanal (6%) and Telecentro (5.3%). More than 80% of the homes having pay TV choose cable TV (CATV), whether analogical or digital, and the rest chooses satellite TV (DTH), mainly the services rendered by the company DirecTV.

1.9. Independent production companies

Officially, the fiction of privately-held broadcast television networks is created by only one company linked to one of the networks: Pol-ka, which belongs to El Trece. However, the rest of the large production companies with work continuity over the last years (Underground, El Árbol, Cris Morena Group, L.C. Producciones, 100 Bares) associate and co-produce with Telefe, the network that broadcasts their programs.

Most small production companies during 2015 were sustained through the different forms of funding of the National Institute of Cinema and Audiovisual Arts (Incaa). The fiction formats produced in this manner were serial programs or miniseries with no more than 13 episodes.

1.10. International trends

Regarding the place taken up by fiction in Argentine broadcast TV, some differences may be observed with respect to the trends developed at the international level. During 2015 there was no sig-

⁶ As per data from the Latin American Multichannel Advertising Council.

nificant increase in local productions linked to the growth of pay TV fiction. Within the framework of broadcast TV, the forms of long-duration series fiction have been reducing the quantity of shows premiered for several years now. Even the trend is consolidated whereby important productions are transferred to marginal slots in the programming schedule. In 2015, there is still a significant amount of national premieres thanks to the large number of miniseries produced during the year.

The broadcast TV audience remained stable, the investment in advertising increased and the ICT continued to grow. However, this context did not facilitate the growth of fiction within the programming schedule and affected mainly the local production.

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

Table 1. Fiction broadcast in 2015 (national and foreign; premieres and reruns; and co-productions)

PREMIERE NATIONAL TITLES – 28	CO-PRODUCTIONS – 2
<p>Telefe – 2 titles</p> <p>1. <i>Viudas e Hijos del Rock & Roll</i> (Telenovela)</p> <p>2. <i>Historia de un Clan</i> (miniseries)</p> <p>El Trece – 3 titles</p> <p>3. <i>Esperanza Mía</i> (telenovela)</p> <p>4. <i>Guapas</i> (telenovela)</p> <p>5. <i>Noche & Día</i> (telenovela)</p> <p>Canal 9 – 2 titles</p> <p>6. <i>Milagros en Campaña</i> (miniseries)</p> <p>7. <i>Conflictos Modernos</i> (miniseries)</p> <p>TV Pública – 10 titles</p> <p>8. <i>4 Reinas</i> (miniseries)</p> <p>9. <i>Cromo</i> (miniseries)</p> <p>10. <i>El Mal Menor</i> (miniseries)</p> <p>11. <i>El Otro</i> (miniseries)</p> <p>12. <i>Fábricas</i> (miniseries)</p> <p>13. <i>La Verdad</i> (miniseries)</p> <p>14. <i>Los Siete Locos y Los Lanzallamas</i> (miniseries)</p>	<p>Telefe – 1 title</p> <p>20. <i>Entre Caníbales</i> (miniseries – Argentina/Uruguay/USA)</p> <p>El Trece – 1 title</p> <p>21. <i>Signos</i> (miniseries – Argentina/USA)</p> <p>PREMIERE FOREIGN TITLES – 20</p> <p>Telefe – 4 titles*</p> <p>1. <i>Amores Robados</i> (miniseries – Brazil)</p> <p>2. <i>El Príncipe</i> (series – Spain)</p> <p>3. <i>Niños Robados</i> (miniseries – Spain)</p> <p>4. <i>Rastros de Mentiras</i> (telenovela – Brazil)</p> <p>El Trece – 0 titles**</p> <p>Canal 9 – 15 titles</p> <p>5. <i>La Gata</i> (telenovela – Mexico)</p> <p>6. <i>La Malquerida</i> (telenovela – Mexico)</p> <p>7. <i>La Viuda Negra o La Patrona del Patrón</i> (telenovela – Colombia)</p> <p>8. <i>Lo que la Vida Me Robó</i> (telenovela – Mexico)</p>

<p>15. <i>Malicia</i> (miniseries) 16. <i>Presentes</i> (miniseries) 17. <i>Variaciones Walsh</i> (miniseries)</p> <p>América – 2 titles 18. <i>Cazados</i> (miniseries) 19. <i>Pan y Vino</i> (miniseries)</p>	<p>9. <i>A que no Me Dejas</i> (telenovela – Mexico) 10. <i>Dueños del Paraíso</i> (telenovela – USA/Chile) 11. <i>La Hija del Mariachi</i> (telenovela – Colombia) 12. <i>La Sombra del Pasado</i> (telenovela – Mexico) 13. <i>Lo Imperdonable</i> (telenovela – Mexico) 14. <i>Mi Corazón es Tuyo</i> (telenovela – Mexico) 15. <i>Por Ella Soy Eva</i> (telenovela – Mexico) 16. <i>Por Siempre mi Amor</i> (telenovela – Mexico) 17. <i>Señora de Acero</i> (telenovela – Mexico) 18. <i>Tiro de Gracia</i> (telenovela – Colombia) 19. <i>Yo No Creo en los Hombres</i> (telenovela – Mexico)</p> <p>TV Pública – 1 title 20. <i>Amar en Tiempos Revueltos</i> (telenovela – Spain)</p> <p>RERUNS – 4 Telefe – 3 titles 1. <i>Casados con Hijos</i> (comedy – Argentina) 2. <i>Avenida Brasil</i> (telenovela – Brazil) 3. <i>Dulce Amor</i> (telenovela – Argentina)</p> <p>América 2 – 1 title 4. <i>La Celebración</i> (miniseries – Argentina)</p> <p>TOTAL PREMIERE TITLES: 41 TOTAL RERUNS: 4 TOTAL TITLES: 45</p>
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* Telefe broadcast other five titles imported from Turkey (non Obitel titles): *¿Qué Culpa Tiene Fatmagül?*, *Secretos*, *Nadie es Inocente*, *El Precio del Amor*, *Ezel* and *Karadayi*.

** El Trece broadcast Turkish telenovela *Las Mil y Una Noches* as well.

Source: Kantar Ibope Media and Obitel Argentina

The total number of premieres drops from 52 to 45 compared to 2014. This is partly due to a turn towards information and politics, which is typical of the electoral year, as mentioned before.

El Trece and Telefe maintain their prime time spaces reserved for their own productions, but in both signals a very significant drop of national production is observed: Telefe goes from eight premieres in 2014 to two productions of its own and one co-production in 2015; El Trece goes from six to three productions of its own and one co-production. This drop in national production premieres in both signals is substituted in the programming schedule by Turkish tele-novelas (five in the case of Telefe and one in the case of El Trece, a network more reluctant to foreign programming).

Table 2. Premiere fiction in 2015: countries of origin

Country	Ti-tles	%	Chapters/ episodes	%	Hours	%
NATIONAL (total)	21	51.2	675	28.5	527:56:39	29.9
OBITEL COUNTRIES (total)	20	48.8	1690	71.5	1234:56:50	70.1
NON OBITEL COUNTRIES (total)	0	0.0	0	0.0	0:00	0.0
Argentina	19	46.3	598	25.3	465:40:23	26.4
Brazil	2	4.9	164	6.9	137:47:22	7.8
Chile	0	0.0	0	0.0	0:00	0.0
Colombia	3	7.3	217	9.2	131:32:08	7.5
Ecuador	0	0.0	0	0.0	0:00	0.0
Spain	3	7.3	273	11.5	212:28:14	12.1
USA (Hispanic production)	1	2.4	71	3.0	55:17:36	3.1
Mexico	11	26.8	965	40.8	697:51:30	39.6
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
National co-productions	2	4.9	77	3.3	14:16	3.5
Ibero-American co-productions	0	0.0	0	0.0	00:00:00	0.0
TOTAL	41	100.0	2365	100.0	1762:53:30	100.0

Source: Kantar Ibope Media and Obitel Argentina

The drop in the usual number of titles of the fiction leading networks, such as Telefe and El Trece, reduces almost to one half the total amount of national fiction premiere hours (in 2014 the total was 1145:35:00). With respect to the premieres within the Obitel scope, the number of titles premiered remained in 20 and their origin is again centered in Spanish-speaking countries for national TV. The premiere of a total of six titles of Turkish origin must be added to this offer.

Table 3. Co-productions

Co-productions	Titles	Co-producer countries	Producers	Format
Argentina + Obitel countries	<i>Signos</i>	Argentina	Pol-ka	Series
		USA	Turner	
	<i>Entre Caníbales</i>	Argentina	Telefe-100 Bares	Miniseries
		Uruguay	Monte Carlo TV	
		USA	Turner	
TOTAL TITLES CO-PRODUCED WITH OBITEL COUNTRIES: 2				
Argentina + non Obitel countries				
TOTAL TITLES CO-PRODUCED WITH NON OBITEL COUNTRIES: 0				
Other Obitel countries + non Obitel countries				
TOTAL TITLES CO-PRODUCED BY OTHER OBITEL COUNTRY + NON OBITEL COUNTRIES: 0				
TOTAL CO-PRODUCTIONS: 2				

Source: Kantar Ibope Media and Obitel Argentina

Unlike previous years, in 2015 two series co-produced with countries within the Obitel scope are premiered. In both of them an association with Turner from the United States was sought, in one of which Uruguay participated as well.

Table 4. Chapters/episodes and hours broadcast per time slot

Time slot	National			Ibero-American			Total		
	C/E	%	H	C/E	%	H	C/E	%	H
Morning (06:00-13:00)	14	2.1	9:10	18	1.1	11:15	32	1.4	20:25
Afternoon (13:00-21:00)	13	1.9	4:25	1350	79.9	960:50:00	1363	57.6	965:15:00
Prime time (21:00-24:00)	615	91.1	485:30:00	322	19.1	262:50:00	937	39.6	748:20:00
Night (24:00-06:00)	33	4.9	28:50:00	0	0	0:00	33	1.4	28:50:00
Total	675	100	527:55:00	1690	100	1234:55:00	2365	100	1762:50:00

Source: Kantar Ibope Media and Obitel Argentina

Table 5. Formats of national and Ibero-American fiction

Format	National				Ibero-American			
	Titles	%	C/E	H	Titles	%	C/E	H
<i>Telenovela</i>	4	19	371	318:00:00	17	85	1658	1212:00:00
<i>Series</i>	1	4.8	62	48:15:00	1	5	22	14:55
<i>Miniseries</i>	16	76.2	242	161:40:00	2	10	10	8:00
<i>Telefilm</i>	0	0	0	0:00	0	0	0	0:00
<i>Unitario</i>	0	0	0	0:00	0	0	0	0:00
<i>Docudrama</i>	0	0	0	0:00	0	0	0	0:00
<i>Others (soap opera, etc.)</i>	0	0	0	0:00	0	0	0	0:00
Total	21	100	675	527:55:00	20	100	1690	1234:55:00

Source: Kantar Ibope Media and Obitel Argentina

In line with the drop in the total number of titles and hours of national production, the number of fiction episodes premiered is reduced. Particularly because the growth in the short-duration formats with a high rotation of titles reduced the number of episodes only to one third of the 2014 offer. This reduction of national production chapters is especially evidenced in the afternoon slot (it drops from 20% in 2014 to 0.8% in 2015).

The switch in national premiere programming is especially evidenced in the quantity of titles premiered by fiction format, reaching in 2015 to practically reverse the proportion of the short and long-duration formats. Only four *telenovelas* premiered, ten less than in 2014, and 16 miniseries, twice as much as in the previous year. As far as premiere fiction coming from the Obitel scope is concerned, *telenovelas* continue to prevail in the screen.

Table 6. Formats of national fiction per time slot

Format	Morn- ing	%	After- noon	%	Prime time	%	Night	%	To- tal	%
<i>Telenovela</i>	0	0	0	0	4	23.5	0	0	4	19
Series	0	0	0	0	1	5.9	0	0	1	4.8
Miniseries	1	100	1	100	12	70.6	2	100	16	76.2
Telefilm	0	0	0	0	0	0	0	0	0	0
<i>Unitario</i>	0	0	0	0	0	0	0	0	0	0
Docudrama	0	0	0	0	0	0	0	0	0	0
Others (soap opera, etc.)	0	0	0	0	0	0	0	0	0	0
Total	1	100	1	100	17	100	2	100	21	100

Source: Kantar Ibope Media and Obitel Argentina

National fiction retains the prime time, and the premiere of miniseries is concentrated mainly on Televisión Pública. In turn, premieres of the Obitel *telenovelas* are scheduled in a privileged manner in the afternoon time slot.

Table 7. Time period in which fiction is set

Time period	Titles	%
Present	18	85.7
Period piece	2	9.5
Historical	1	4.8
Other	0	0
Total	21	100

Source: Kantar Ibope Media and Obitel Argentina

The type of fiction that questions spectators from their contemporaneity in long fictions continues to prevail. Just as in previous years, the offered titles review the Argentine recent past in the mini-series funded by the Incaa.

Table 8. The ten most watched titles: origin, rating, share

	Title	Country of original idea or script	Producer (country)	Channel	Scriptwriter or author of original idea	Rating	Share
1	<i>Esperanza Mía</i>	Argentina	Pol-ka (Argentina)	El Trece	OI: Adrian Suar S: Marta Betoldi	14.1	20.7
2	<i>Rastros de Mentiras</i>	Brazil	Globo (Brazil)	Telefe	Walcyr Carrasco	12.7	23.6
3	<i>Niños Robados</i>	Spain	Telecinco Cinema (Spain)	Telefe	Salvador Calvo, Helena Medina	11.9	21
4	<i>Historia de un Clan</i>	Argentina	Underground/ Telefe (Argentina)	Telefe	Luis Ortega, Javier Van de Couter, Pablo Ramos	11.8	19.5
5	<i>Viudas e Hijos del Rock & Roll</i>	Argentina	Underground/ Endemol (Argentina)	Telefe	OI: Sebastián Ortega S: Ernesto Korovsky	11.6	19.8
6	<i>Signos</i>	Argentina	Pol-ka (Argentina); Turner (USA)	El Trece	OI: Adrian-Suar S: Leandro Calderone, Carolina Aguirre	11	16.9

7	<i>Noche & Día</i>	Argentina	Pol-ka (Argentina)	El Trece	OI: Adrian Suar S: Marcos Osorio Vidal	9.6	17.6
8	<i>Guapas</i>	Argentina	Pol-ka (Argentina)	El Trece	OI: Adrian-Suar S: Leandro Calderone, Carolina Aguirre	9.4	16.9
9	<i>Amores Robados</i>	Brazil	Globo (Brazil)	Telefe	George Moura	8.6	14.4
10	<i>Entre Caníbales</i>	Argentina	Telefe/100 Bares (Argentina); Monte Carlo TV (Uruguay)	Telefe	OI: Juan José Campanella S: Gustavo Belatti, Emanuel Diez	7.6	14.6
Total productions: 10				Foreign scripts: 3			
100%				30%			

Source: Kantar Ibope Media and Obitel Argentina

As usual, the networks Telefe and El Trece concentrate the fiction audience, even though the top ten average rating in 2015 is very low. Ever since the success of *Avenida Brasil* in 2014, the presence of premieres from the Obitel scope increases in this table.

Table 9. The ten most watched titles: format, length, time slot

	Title	Format	Genre	Number of chap./ ep. (in 2015)	First and last broadcast (in 2015)	Time slot
1	<i>Esperanza Mía</i>	Telenovela	Romantic comedy	184	04/06-12/31	Prime time
2	<i>Rastros de Mentiras</i>	Telenovela	Melodrama	134	01/05-07/10	Prime time
3	<i>Niños Robados</i>	Miniseries	Drama	2	05/17-05/18	Prime time
4	<i>Historia de un Clan</i>	Miniseries	Thriller	11	09/09-11/18	Prime time
5	<i>Viudas e Hijos del Rock & Roll</i>	Telenovela	Romantic comedy	79	01/05-05/13	Prime time
6	<i>Signos</i>	Miniseries	Drama	16	09/02-12/16	Prime time

7	<i>Noche & Día</i>	Telenovela	Police	99	01/01-08/19	Prime time
8	<i>Guapas</i>	Telenovela	Drama/ comedy	7	01/01-01/09	Prime time
9	<i>Amores Robados</i>	Miniseries	Drama	8	09/21-10/02	Prime time
10	<i>Entre Caníbales</i>	Series	Drama	60	05/20-09/15	Prime time

Source: Obitel Argentina

The most watched fiction programs were all placed at prime time, even with ratings that were lower than in previous years. The growth of lower duration fiction (series and miniseries) within the top ten stands out.

Table 10. Themes in the ten most watched titles

Title		Prevailing themes	Social themes
1	<i>Esperanza Mía</i>	Orphanage, forbidden romance, religious vocation, conflict of identity.	Environmental contamination, search for justice.
2	<i>Rastros de Mentiras</i>	Family tradition, betrayals, family secrets.	Homosexuality, unwanted pregnancies, child abduction.
3	<i>Niños Robados</i>	Search for identity, conspiracy.	Teenage pregnancy, child abduction, institutional corruption.
4	<i>Historia de un Clan</i>	Organized crime, family traditions, patriarchy, conspiracy, violence.	Institutional corruption.
5	<i>Viudas e Hijos del Rock & Roll</i>	Love, hidden identity, friendship and evocation of adolescence.	Homosexuality, class relationships and discrimination.
6	<i>Signos</i>	Murder, superstition, lies, concealment of identity, fanaticism.	Horoscope, serial killer.
7	<i>Noche & Día</i>	Love, betrayal, double life, exile.	Depression, alcoholism, psychiatric illnesses.
8	<i>Guapas</i>	Scam, friendship and overcoming of fears.	Gender-based violence, infidelity, infertility, class differences and abuse.
9	<i>Amores Robados</i>	Jealousy, deceit, vengeance, forbidden loves.	Tension tradition/modernity, progress, male chauvinism.
10	<i>Entre Caníbales</i>	Vengeance, violence, love.	Rape, political corruption, unwanted pregnancy.

Source: Obitel Argentina

In the top ten, themes related to social problems stand out, in particular, subjects such as unwanted pregnancies persist, although there is no evidence of awareness actions or forms of explicit precaution regarding these subjects. In turn, the prevailing subjects of the ten most watched titles are focused on the genre's traditional spaces, such as vengeance and deceit. The themes and approaches regarding the police/crime genre also stand out.

**Table 11. Audience profile of the ten most watched titles:
gender, age, socioeconomic status**

	Title	Channel	Gender %		Socioeconomic status %			
			Wom-en	Men	ABC1	C2	C3	D
1	<i>Esperanza Mía</i>	El Trece	62.8	37.2	21.7	23.5	30.2	24.6
2	<i>Rastros de Mentiras</i>	Telefe	59.9	40.1	16.0	20.1	26.2	37.7
3	<i>Niños Robados</i>	Telefe	59.0	41.0	21.6	21.6	24.6	32.2
4	<i>Historia de un Clan</i>	Telefe	54.1	45.9	22.5	21.6	22.7	33.2
5	<i>Viudas e Hijos del Rock & Roll</i>	Telefe	56.3	43.7	23.6	16.0	25.4	35.0
6	<i>Signos</i>	El Trece	58.7	41.3	29.3	22.4	26.0	22.4
7	<i>Noche & Día</i>	El Trece	60.4	39.6	11.3	30.4	32.2	26.0
8	<i>Guapas</i>	El Trece	64.0	36.0	16.4	29.6	30.6	23.4
9	<i>Amores Robados</i>	Telefe	57.6	42.4	29.3	14.7	19.0	37.1
10	<i>Entre Caníbales</i>	Telefe	59.1	40.9	36.3	19.1	18.2	26.4

	Title	Channel	Age group %				
			4-12	13-18	19-24	35-44	50+
1	<i>Esperanza Mía</i>	El Trece	16.3	23.1	22.6	17.2	20.7
2	<i>Rastros de Mentiras</i>	Telefe	17.2	22.5	22.1	19.1	19.1
3	<i>Niños Robados</i>	Telefe	15.3	21.7	20.0	23.2	19.9
4	<i>Historia de un Clan</i>	Telefe	18.9	21.5	23.4	20.6	15.5
5	<i>Viudas e Hijos del Rock & Roll</i>	Telefe	17.8	25.9	20.6	19.9	15.9
6	<i>Signos</i>	El Trece	12.1	20.7	24.8	20.9	21.5
7	<i>Noche & Día</i>	El Trece	10.6	23.0	23.6	17.2	25.5

8	<i>Guapas</i>	El Trece	9.2	16.8	28.2	13.2	32.5
9	<i>Amores Robados</i>	Telefe	18.1	22.7	23.7	21.6	13.9
10	<i>Entre Caníbales</i>	Telefe	14.2	22.8	23.9	20.5	18.6

Fuente: Kantar Ibope Media and Obitel Argentina

The case of *Esperanza Mía* stands out due to the preponderance of a female audience.

Summing up, it may be stated that the national premiere fiction is concentrated at prime time, leaving other programming spaces. Although the total number of titles offered is maintained, the time on screen and the amount of episodes drop remarkably, given the fact that the formats offered are of short duration. The rating of the most watched titles is too low compared to previous years.

3. Transmedia reception

The most watched premiere national fiction in Argentine television in 2015 was the one that generated more feedback with part of its audience in social networks. Although, as it can be seen in Table 11, *Esperanza Mía* is preferred by the female audience, it is not so in terms of the age segment that followed the *telenovela*.

The transmedia strategies are present from the very beginning of the show, which started with a presentation in a studio in which the main characters sang several of the songs that would develop throughout the program. *Esperanza Mía* narrates the love story between Esperanza (a young woman who, being in the run, gets shelter in a convent, impersonating a novice) and Tomás (the church's priest). Esperanza joins the choir the Santa Rosa Convent has. Music is a constant in the show and accompanies the development of all the stories.

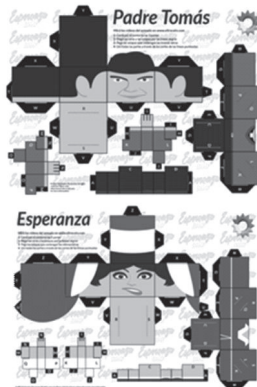
The show's presentation in a concert was possible thanks to the fact that the main actress, Mariana "Lali" Espósito, has a teen star past, since she participated in the fictions produced by Cris Morena Group and the Teen Angels band. In turn, the show's heartthrob, Mariano Martínez, had sung *cumbia* in *Son Amores* with great ac-

ceptance from the audience. This combination of the protagonists prepared the necessary ingredients to ensure a wide basis of family audience to conquer their fans. This way, the love for the main characters and for the show multiplied, generating mysticism among their followers on social networks. One of the topics that accompanied the series is the rivalry between the fans of the actress and of those of another young actress/singer, Tini Stoessel, protagonist of *Violetta*.

The activity of the fans accompanying *Esperanza Mía* was intense. However, throughout the fiction it was confirmed that the follow-up of the female fans and the strong participation in networks through posts and comments are less linked to fiction than to its main characters. Unlike other national programs for children and teenagers that generated several spaces of transmedia production, the fictions premiered by El Trece have a more delimited permission for interchange from their official spaces. The network's and the show's websites offer the chapters once they have been broadcast. As an addition, comments and assessments of the fiction events as well as of the characters and actors are allowed in these spaces. The most organized fan groups, such as Lalitas, add up to these spaces, expanding their fanaticism to the creation of Facebook communities for fans of the series.

Towards the middle of the year, the launching of the comedy's theater production causes the insistence – from the social networks – for the fiction couple to “become real”, a fact that finally takes place. The fans created the hashtag #mariali to comment on each of the steps of the love relationship between the actors. The effervescence appearing in the social networks focuses on the actors rather than on the show. This mixture is reinforced by the fact that, in parallel with the *telenovela*, the actress launches its career as a solo singer. This way, the image of Lali Espósito makes it possible to feed back fiction from the stages, although with less strength than the traction the show seems to make towards the stages. During 2015, the female protagonist edits two records and makes a tour, on top of the theater seasons that transpose the TV story.

The positioning strategy of *Esperanza Mía* departs from the quality of the actors-singers since before the premiere. Within this context, the official Twitter account of El Trece and of the show (@EsperanzaMiaOK) promoted “the karaoke game of the show” and also offered several tutorials available at the official account to “sing like the nuns”. In both Twitter accounts documents were included of the solidarity actions undertaken by the characters in association with different institutions, just as it happened on the McHappy Day. In the link the show proposed to its audience, there were also contests related to the knowledge of the show, rewarded with tickets for the theater performances.



Finally, it is interesting to highlight an action performed on the official website of El Trece once the broadcast ended, which continued the plot of the *telenovela*, as well as of the romance of the main characters: the invitation to “create your own stories about Tomás and Esperanza”. The network offered the stage and the images of the protagonists for the stories to continue beyond the screen. This fun proposal, like the actions linked to the karaoke, aim at an audience that, despite being a family audience, is particularly associated with lower-age spectators.

Thus, it can be stated that, while the network’s and the show’s strategy was to feed the screen from the social networks’ spaces, in

the spaces created by the followers, their concern was the opposite, from fiction to the lives of the actors, with the same romance and success story.

4. Highlights of the year

Year 2015 was a negative period for Ibero-American fiction in Argentine television. The number of important local premieres decreased noticeably and, even though the quantity of productions within the Obitel scope was maintained, their audience levels dropped. Within this context, the greatest television fiction success was the appearance of the Turkish *telenovelas*, completely unknown in Argentina up to that moment. During the entire year the two main broadcast networks broadcast a total of six Turkish titles. The starting point was the success *Las Mil y Una Noches* on El Trece. The story based upon a clear melodramatic framework turned out to be an audience phenomenon. Its last chapter achieved 27.7 rating points, an unusual figure for local fiction, and throughout the 160 chapters it had an average of 19.2 rating points. This success was followed by the Turkish programs premiered by Telefe, which, in general, had a high rating level: *¿Qué Culpa Tiene Fatmagül?* (11.5), *Ezel* (9.5), *Secretos, Nadie es Inocente* (8.2), *El Precio del Amor* (6.9) and *Karadayi* (5.9). Four of these programs had rating levels that were higher or equal to the ones appearing among Obitel's top ten. Taking into account weekend reruns and special summaries, these six titles added up 538 chapters and 427:25 screen hours, barely 100 less hours than the aggregate of national fiction broadcast during the year. The return to the traditional narrative of the Turkish shows and their low broadcast cost, along with a good technical quality, turned out to be a solution (though temporary) to the local networks in face of the difficulties the TV had to cope with in 2015.

Beyond this important piece of news, the networks with national coverage maintained their production and diffusion strategies of fiction programs. El Trece broke the monopoly of its production company Pol-ka only with *Las Mil y Una Noches*. But it also reori-

ented its production (usually thought for the country) by associating with Turner in its miniseries *Signos*. In this miniseries it takes up themes and kinds of characters from the multiscreen series, such as *Breaking Bad* or *Dexter*. For this program, the network modified its broadcast policy centered in broadcast TV and the show was watched via El Trece as well as a pre-recorded broadcast via cable signal TNT. In *Noche y Día*, the *telenovela* with a detective-story background, and in the end of *Guapas*, Pol-ka continued appealing to the mixture of genres within a customs and manners framework. The greatest success self-produced and broadcast by El Trece was *Esperanza Mía*, a romantic comedy that goes along the lines of the shows for children and youngsters produced by Cris Morena.

Telefe sustained its fiction programming with nine foreign titles and three productions with the participation of independent local companies. While foreign programs aimed at a classical story style, the two Argentine premieres of the year turned out to be two innovative choices with dissimilar results. The most important one from the production and promotion standpoint was *Entre Caníbales*, created by Oscar winner Juan José Campanella and co-produced by Turner and Montecarlo TV from Uruguay. It placed its bet to the political corruption topic in an electoral year, but it failed, judging by the audience, probably because it did not take into account the audience's surfeit around the subject. Despite the criticism the creator made to spectators, stating that they did not "understand" the level of his program, the fact that Campanella – who has a strong cinematographic training – was not able to handle the codes of broadcast TV long series needs to be admitted. It only reached 60 chapters, thanks to the agreement with Turner, which ensured the series would be broadcast also via TNT.

With far less promotion and running more aesthetic risks, *Historia de un Clan* turned out to be more successful. The miniseries was co-produced by Underground (usual Telefe supplier) and the Incaa. It was the first show with State support that entered our top ten and also achieved an excellent repercussion as far as criticism

is concerned. Maintaining the technical quality of the miniseries co-produced by the State, it worked with a known subject based on true facts. *Historia de un Clan* narrates these episodes without looking for a realistic authenticity, but through styling characters and situations instead.

The rest of the national fiction programming was funded by the Incaa. The 13 miniseries or serial programs were broadcast mainly by Televisión Pública during the prime time. Only four of them were broadcast by Canal 9 and América 2 in really marginal slots. Even though they had a high technical level and interesting stories, these shows did not reach great levels of audience. Although they were broadcast in the networks with less rating levels, targeting the audience was complicated due to the scarce or null diffusion they had. Shows such as the adaptation of the Argentine classic *Los Siete Locos y Los Lanzallamas*, the versions of Rodolfo Walsh's detective tales (*Variaciones Walsh*) or the detective story with an ecological background *Cromo* were extremely attractive accounts for those who managed to watch them.

Summarizing, the TV fiction news in Argentina during 2015 fluctuated between a return to more traditional formats through the Turkish *telenovelas* broadcast by the networks with highest levels of audience and innovations sustained by productions receiving State support.

5. Theme of the year: (re)invention of TV fiction genres and formats

In Argentina, the ways in which production companies and networks face the changes in audiovisual fiction are strongly conditioned by some of their own features. Since the beginning of the 90s, after the re-privatization of the main TV networks, a production model was established, which fell into a crisis with the emergence of new broadcast modalities (streaming services) and expectancy modalities (through different platforms, within the broadcast TV programming schedule, pre-recorded, brought). The context of TV

fiction maintained common features over almost 20 years. In Argentina, production companies are firms independent from networks. For Pol-ka, the largest one, its autonomy over the years turned out to be only nominal, since it was acquired by Clarín holding, owner of El Trece. The separation of the production and broadcast instances maintains a system that, on the one hand, makes the economic risks to be assumed mainly by the creative part and, on the other hand, a specialization process occurs within production companies so as to survive. Thus, Pol-ka aims at the customs and manners that prioritize the local market, Cris Morena Group develops programs for children and youngsters and Underground bets upon the search for innovation with a view to an international audience. Within this framework, the participation of foreign companies (Dori Media, Endemol, HBO) is contingent and marginal (Aprea and Kirchheimer, 2012). In tandem with the development of the TV narrative, a boom of Argentine cinematography occurs during the same period. The TV networks take part in some important projects with wide repercussion, but, in general, they are excluded from the new, most innovative proposals that constituted the so called New Argentine Cinema. On the basis of these players and the policies that they develop, the insertion of TV fiction in the international market takes place through the sale of formats instead of through the export of programs made.

In turn, the national audiovisual media system is distinguished by the weight and the range of cable TV, which, since long time ago, has covered more than 80% of homes and is highly concentrated. The production of national shows addressed to the local networks of this medium is very small and its scale does not compete with those aired by broadcast TV. Until recent years, the main function of cable TV was to rerun successes of local broadcast TV. At the same time, pay TV is an important vehicle for the diffusion of new global narratives (*Lost*, *House of Cards*, *Breaking Bad*), which renew not only the production level and story type but also the receiving modes (VoD, bringed).

Within the traditional outlook, the prevailing format was the classic *telenovela*: long series with continuity from chapter to chapter and a happy ending. These programs have around 100 and 120 daily broadcasts of one hour duration each presented during the prime time. This type of story preserves some melodramatic elements of *telenovelas*, such as: the presence of at least one passionate love story linked to the opening and closing of the story; certain manichaeism in the construction of characters; and emphasis on showing the characters' suffering. This basic scheme has been gaining complexity over the years through the hybridization of *telenovela* with other popular genres, such as comedy and detective stories, or with the introduction of fantasy elements (Mazziotti, 1996; Soto, 1996). At the same time, stories evolved from being linear, focused on only one center-stage couple to stories with several intertwined plots and choral protagonists.

Since the growth and consolidation of a media environment of multiple options and abundant offers (Greenfield, 2015), Argentine television applied different strategies for adapting to a form of competition to capture the audiences' attention.

Since 2011 the broadcast of the entire fiction chapters in streaming was consolidated. Within this new strategy for the circulation of programs, the different networks adopted different positions. El Trece maintains a restricted on-screen time from its website, making it difficult to copy the episodes and withdrawing the chapters from the net soon after the end of the show. Telefe, on the contrary, maintains its products in its YouTube channel and does not prevent the making of copies. In 2013 it even tried, without success, to broadcast *Aliados*, created by Cris Morena Group, advancing parts of each chapter on the web (Aprea and Kirchheimer, 2014). Since 2011, productions by the National Institute of Cinema and Audiovisual Arts (Incaa) are thought in terms of their broadcast through the internet. For this purpose, the Argentine Audiovisual Bank of Universal Contents (Bacua) was created, where most of the complete programs supported by the State up to 2015 were made available.

This policy not necessarily facilitated the multiscreen circulation of its programs, which, in many cases (particularly federal productions created outside Buenos Aires), did not achieve access either to broadcast or to cable TV. Consistently with the expansion of screens that introduce the same product, production companies started to systematically develop the launching of new programs through social networks. Within this trend, the presence of websites for each new fiction is standardized. At the same time, a fluid and permanent contact with the relevant audiences is maintained. These new forms of connection with the audience are outsourced by the production instances and are left in hands of companies specialized in this type of endeavors.

Despite these efforts to include the broadcast TV programming in a multiscreen broadcast circuit, the displacement of spectators to other forms of audiovisual fiction consumption cannot be stopped. Over time, the exit of certain levels of audience, such as the sectors with higher economic resources and the new generations, is deepened. It is in this regard that certain phenomena may be thought, such as the success of the Turkish *telenovelas*, which are introduced with a style linked to melodrama that is closer to the taste of the oldest age groups and the sectors with lower resources. Likewise, an assessment may be made of the failure of an important production like *Entre Caníbales*, which chooses an aesthetics that is proper of the global fiction series to address a topic (political corruption) that is typical of *telenovelas*. According to Juan José Campanella, the creator of this project, Argentine broadcast TV is on board of the international trend that reduces its space to news, talk shows, entertainment and sport shows (Seselosvsky, 2015), but in Argentina this phenomenon occurs only partially. The attempts to adapt TV fiction stories to the global fiction style to broadcast television programs fail. The attempt to capture sectors of the audience that adapt their taste and customs to fictions thought for several screens in these cases implies the abandonment of aesthetics accepted by the traditional audience. Several of these projects (*Signos*, *Entre Caníbales*) stay half way between

both proposals and lose effectiveness. In some cases an international format was adapted to the local fiction characteristics, just as it happened in *Casados con Hijos*. The general patterns of the sitcom *Married with Children* (a dysfunctional and unsuccessful family) are mixed up with the distinctive features of a great local comedic actor (Guillermo Francella) and aspects coming from the long customs and manners tradition. Based upon a work on the format, the program achieves 215 episodes and its reruns are successful over ten years.

Another existing problem for the adaptation of television fiction to the new situation is related to the format. Long stories like *telenovelas* cannot easily sustain in Argentina the production levels that aim at a global audience, and the risk of an economic collapse becomes apparent. In this regard, the choice for formats such as themed miniseries or serial programs with few chapters of the productions supported by the Incaa was a positive contribution. The reduction in the amount of chapters makes it possible to raise the program's production level: it noticeably increases the percentage of natural scenarios with respect to long fiction programs; they have wider and more varied casts; pre-production, shooting and edition time per episode extend; in some cases aesthetic variations exceeding the traditional television fiction proposals are tried. In addition, the program's limited duration facilitates multiplying the offers presenting several topics and styles. The guidelines of this project make it possible to incorporate elements from the new fiction to the new local cinematographic and global TV stories, such as the fragmentary and complex nature of the stories – a work that is closer to the cinematographic work in its visual aspects – and a development of stories that allows for different visualization modalities.

Despite innovations, most of these programs had very low levels of audience. Among the reasons for this mismatch regarding the audience is, for sure, the almost null diffusion that the launching of the programs had, as well as their broadcast in marginal slots in commercial networks or in the public network which did not take rating as a criterion to schedule its programming. Beyond economic

matters, the scarce diffusion of these programs weakens the space of quality TV innovations, just as it happened in *Cromo*, *Los Siete Locos y los Lanzallamas* or *Las Trece Esposas de Wilson Fernández*. Since the drop of the audience in broadcast TV in a country where pay TV is widely spread, but has no production of its own, the smallest production firms lose their innovation spot in commercial networks. This way, one of the distinctive elements of the Argentine TV industry, that is, its ability to create innovations and assume risks, is weakened. The insertion of its products in the international market through the sale of formats is based upon this ability.

In face of this situation, in 2015 two options were opened. On the one hand, it was suggested to associate the most important and prestigious productions (*Signos* and *Entre Caníbales*) with Turner International Argentina and Sony Picture Television in the search for an international distribution. However, this choice focused on the local audience did not achieve the expected results. These programs turned out to be hybrids that neither fully entered the global standards nor captured enough attention for the local audiences. On the other hand, in 2015 an experience was developed that managed to combine the incorporation of aesthetic elements with the local TV tradition: *Historia de un Clan*.

This miniseries produced by the Incaa, Underground and TNT had a good promotion, reached interesting audience levels in broadcast TV as well as in cable TV and achieved wide recognition.⁷ *Historia de un Clan* tells a story based upon real facts occurred at the beginning of the 80s, which had already been told in the most successful Argentine movie of the year, *El Clan de Pablo Trapero*, which was co-produced by Telefe as well. Both accounts tell the same story.⁸ The film offers a detective story that aims at thoroughly

⁷ In the Tato awards, granted by the Argentine Chamber of Independent TV Producers (Capit, in Spanish), it won the “best show of the year” award and had 16 other nominations, out of which it won 12.

⁸ A middle-class family, the Puccios, which has among its members a well-known rugby player. Despite its appearance of a typical family, the father (a former agent of the dictatorship intelligence services) leads a gang that kidnaps businessmen, imprisons them at

following historical facts, focusing on the psychopathic nature of the father and the perverse relationship he has with his son. The miniseries takes these elements into account, but it also works with a style that makes several disruptive proposals in the formal and theme aspects. The story is centered on the relationships of a group that appears as the catholic family model, but its members have a double life that is adapted and regulated by the father's perversion. The type of characters whose motivations are based upon the dark features of one's personality may be interpreted as a reading of some of the main characters of the global stories. In turn, the miniseries resorts to manichaeism and exaggeration levels that are proper of the melodramatic characteristics of *telenovela*. In the formal aspect, there is a careful work on the image involving an age reconstruction that encompasses even the formal qualities of the color the Argentine TV used to broadcast during that period. The technical quality surpasses the usual standard (just as it happens in other miniseries, such as *Cromo* or *Los Siete Locos y los Lanzallamas*) even for Underground, a production company that stands out for working in those aspects. This set of choices that integrates elements of global stories with modalities of the local fiction tradition ends up building a more modest, yet more successful model for Argentine television than the one that offers a partial imitation of international successes.

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2

BRAZIL: “TV TRANSFORMED” IN BRAZILIAN TELEVISION FICTION

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1. Brazil’s audiovisual context in 2015

As expected, the deep political and economic crisis experienced by the country has affected various segments in the audiovisual field. Paradoxically, however, the dynamism of the television industry in 2015 has rarely been matched in the past: Globo celebrated its 50th anniversary and Record aired its most successful fiction show of recent times. This ambivalent scenario has led to an extremely interesting synthesis: even in the midst of the crisis (or to survive it), certain trends observed in previous years have been reinforced, such as an increasing adherence to new forms of production, distribution and consumption of TV fiction, like on demand content and mobile applications, the predominance of a “cycle of short stories”, with new formats of television fiction, in addition to the continuous profusion of national productions on pay TV. This has led us to reflect more deeply on the presence of “TV transformed”¹ in

¹ The notion of “TV transformed” was inspired by the observations of Terrence Rafferty on the changes in the current television medium expressed in the article *New Twists for the TV Plot, as Viewer Habits Change*, published in *The New York Times* on October 3rd, 2015, which could be synthesized as: Everything about the medium – how we receive it, how we consume it, how we pay for it, how we interact with it – has been altered. Retrieved on October 4, 2015 from <http://www.nytimes.com/spotlight/tv-transformed?ref=television>.

Brazil – in both content and forms of production, consumption and interaction – created precisely as a response in times of crisis, via the expansion and consolidation of these trends.

We will develop this viewpoint in this paper, which, by a happy coincidence, closes with the theme of the year pointing to one of the most representative factors in the course of this TV transformed: the (re)invention of genres and formats in Brazilian television fiction.

1.1. Open TV in Brazil

In Brazil there are six national open television networks, five of them are private and one is public. As in the previous year, four networks produced and broadcast original national fiction: Globo, Record, SBT and TV Brasil.

Chart 1. National open television broadcasters in Brazil

PRIVATE BROADCASTERS (5)	PUBLIC BROADCASTERS (1)
Globo Record SBT Band RedeTV!	TV Brasil
TOTAL BROADCASTERS = 6	

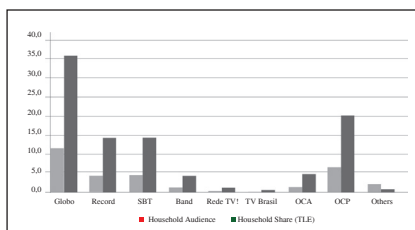
Source: Obitel Brazil

Open television ratings in 2015

Once again Globo led the ratings, a recurrent fact since the beginning, in 2007, of the Obitel Yearbook historical series, now reaching its 10th year. The station had an overall average of 12.4 point, and was the only broadcaster to singlehandedly surpass all pay TV channels combined (OCP). SBT, with 4.9 rating points, remained in second place, surpassing Record, which registered 4.7 points, by three tenths. These two channels have been locked for years in a tight race for second place. Then come Band and RedeTV!, with TV Brasil, the only public broadcaster in the country, remaining in last place.

Graph 1. TV rating and share per broadcaster

Broadcaster	Household audience (TL)	Household share (TLE)
Globo	12.4	37.9
OCP	7.1	21.3
SBT	4.9	15.3
Record	4.7	15.2
OCA	1.6	5.0
Band	1.5	4.6
Rede TV!	0.50	1.5
TV Brasil	0.20	0.6
Other channels ²	2.4	0.04
TLE	32.6	100
Periferics	2.3	-
Recorded cont.	0.07	-
VoD cont.	0.02	-
Other tunes	0.19	-
TOTAL	35.4	97.0



Source: Kantar Ibope Media – Media Workstation – 15 Markets

A growth of pay channels (OCP) was observed, from 6.6 points in 2014 to 7.1 in 2015. The OCP ratings represent the total audience of all pay TV broadcasters, which prevents a direct comparison between channels.

Regarding the household share of televisions sets connected exclusively to television channels (TLE), the so-called “pure audience” of TV, the scenario does not change: Globo is once more far ahead of the other stations; SBT, in a comparison with the household share ratings recorded in 2014, moved up one position, ahead of Record.

As to audience penetration by type of media³, open TV still leads, with 93.3%. Extensive media, including media such as bill-

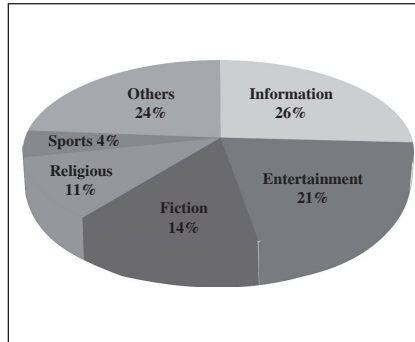
² The “other channels” category refers to genres classified by Kantar Ibope Media as: telesales, rural, tourism, health, prize draws, ‘others’ and ‘not included’.

³ Data from Kantar Ibope Media – Target Group Index – August/2014 to September/2015.

boards, achieved 75.6% of penetration, ranking second. The internet jumped to third place (68.2%), surpassing radio (68%) for the first time. Pay TV, with a 4% increase compared to 2014, reached 50% of penetration. Next come newspapers (24.3%), magazines (22.6%) and movies (17.2%).

Graph 2. Genres and hours broadcast on TV programming

Genres broadcast	Hours broadcast	%
Information	13.585:37	25.9
Entertainment	11.226:33	21.4
Fiction	7.043:45	13.4
Religious	5.744:18	11.0
Sports	2.200:31	4.2
Educational	103:23	0.2
Political	61:34	0.1
Others ⁴	12.466:10	23.8
TOTAL	52.431:51	100.0



Source: Kantar Ibope Media – Media Workstation – 15 Markets

The division of broadcast hours by television genres is very similar to 2014. Information appears first, occupying nearly 26% of the television schedule, followed by entertainment, with 21.5%; fiction comes third with 13.4%. The three genres total 60.8% of TV broadcast hours and still make up the base of Brazilian television programming.

Despite the drop in fiction hours in the last three years, there was a growth in 2015, from 12.4% to 13.4%. Information also had an increase, albeit smaller, from 25.1% to 25.9%, reflecting the country's scenario of instability. Conversely, entertainment, which had been gaining ground in the last five years, fell from 22.3% to 21.4%.

⁴ The "other channels" category refers to genres classified by Kantar Ibope Media as: telesales, rural, tourism, health, prize draws, 'others' and 'not included'.

1.2. Audience trends in 2015

The year 2015 was marked by the reorganization of audience habits and the definite adherence of producers to the possibilities of expanding digital content, especially in the offer of on demand content. It is interesting to note, however, that the TV set persists as the main means of access to this kind of content – for example, most Brazilians access Netflix via TV.

A growing trend is the spread of applications that provide audiences with mobility. Examples include Globo Play (Globo's debut in 2015), TV SBT (SBT), Now (Net), Vivo Play (Vivo), and applications of specific channels, such as Humor Multishow, from Multishow channel (Globosat), among others, which accounted for millions of downloads via App Store (iOS), Google Play (Android) and Windows Phone Store, and which are generally free and available even to non-subscribers.

According to Ibope Inteligência, Brazilians are increasingly multiscreen viewers: 88% of internet users watch TV and at the same time access the internet via mobile phone (65%), computer (28%) or tablet (8%)⁵. Despite cutting costs due to the economic crisis in the country, the class C segment of the population considers internet access to be essential.

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

Despite the economic crisis, investment in advertising in 2015 added up to approximately 132 billion reais, a 9% increase compared to 2014.⁶ Open TV accounted for more than half of those investments, 58.2%, followed by newspapers, with 12.8%, and pay TV, with 11.4%. The segments that most invested in TV continue to be, in order: trade and retail; personal hygiene and beauty; financial markets and insurance; pharmaceutical; and consumer services.

⁵Cf. <http://convergecom.com.br/telaviva/paytv/16/09/2015/88-dos-internautas-brasileiros-assistem-tv-e-navegam-na-internet-ao-mesmo-tempo/>. Accessed in March 2016.

⁶ Cf. <http://www.kantariopemedia.com/investimento-publicitario-soma-r-132-bilhoes-em-2015-indica-kantar-ibope-media/>. Accessed in March 2016.

1.4. Merchandising and socio-educational action in fiction⁷

The use of merchandising (product placement) in fictional TV shows remained high. In the last two chapters of *telenovela Império* (Globo), for example, a soda can (bearing the printed name of a main character) played a “crucial” role in a scene in which it was thrown at a distance to distract the villain, and which was intensely commented on Twitter. Two other noteworthy actions occurred in *A Regra do Jogo* (Globo): the creation of products of fictitious brands with packaging made especially for the plot, and the association between a bank TV commercial and a fiction scene.

Once again we observed the importance and variety of issues related to socio-educational action present in Brazilian television fiction. In 2015, in Globo *telenovelas*, issues such as gender identity, homosexual affective relationships and homophobia were addressed in *Império*, *Babilônia* and *O Canto da Sereia*. Prejudice related to obesity was addressed in *Alto Astral*; to social class in *I Love Paraisópolis*; and to racial intolerance in *Além do Tempo*; *A Regra do Jogo* addressed violence against women. The theme of tolerance/coexistence of different faiths appeared in the *telenovelas Babilônia* (Globo) and *Cúmplices de um Resgate* (SBT). In historical and religious genres, moral and behavioral issues were seen in *Os Dez Mandamentos* and *Milagres de Jesus* (Record).

1.5. Communication policies

Enacted in 2014, the Brazilian Civil Rights Framework for the Internet is currently in the second phase of the process of public consultation for regulation, facing, however, difficulties to regulate technology. In 2015, due to a partnership between the ministries of Communications and Culture, these issues were published online for a first phase of public debate with the whole of society. In addi-

⁷ We have replaced the phrase “social merchandising” with “socio-educational action” since we believe it allows us to address a wider scope of pedagogical manifestations emerging from social issues involved in works of fiction.

tion, adjustments were made to the analog TV shutdown schedule, predicted to start in February 2016 and end in 2023.

The Ministry of Communications has also opened public consultation on the new telecommunications model, which privileges broadband over landline communication, on which the previous model was based. Currently provided by private companies, broadband requires reformulating public policy to enable greater access by different sections of society, focusing on the country's continental scale.

1.6. Information and Communication Technology (ICT) trends

In 2015, 20 years since the arrival of the internet in Brazil, 95.4 million accesses were made by individuals aged 10 or older. According to data from the National Household Sample Survey (Pnad, in Portuguese), 32.5 million households have a personal computer, 28.2 million of which are connected to the internet.⁸ Another research⁹ indicates that the smartphone is the device of highest penetration among the Brazilian population (90%), and Android is the dominant operating system (78%). The average number of applications per user is 20, six of which are used on a weekly basis.

Following global trends, Brazilian viewers have adhered to on demand series and movies. Recent data indicate¹⁰ that Brazilians devote 36% of their daily viewing time to such content, raising the country's VoD consumption above the global average. These data converge in the debate on the declining number of pay TV subscribers: after all, is this due to the economic crisis or to the growth of on demand services? Despite the importance and popularity of traditional TV, new habits – such as watching several episodes of a series in a row (binge-watching) – are becoming commonplace, especially

⁸ Cf. <http://convergecom.com.br/teletime/13/11/2015/numero-de-internautas-sobe-114-em-um-ano-mas-proporcao-de-lares-com-pc-cai-mostra-ibge/>. Accessed in March 2016.

⁹ MMA Mobile Report 2015. Cf. <http://www.adnews.com.br/internet/internet-e-considerada-o-meio-mais-indispensavel-na-vida-do-brasileiro>. Accessed in March 2016.

¹⁰ Cf. <http://convergecom.com.br/teletime/03/09/2015/vod-corresponde-a-36-do-tempo-gasto-com-video-pelo-consumidor-brasileiro/>. Accessed in March 2016.

among subscribers of services like Netflix. Further growth occurs in interactions with UGC (user-generated content) platforms, with one in ten consumers watching YouTube for more than three hours a day, according to the abovementioned research.

With an eye on these new audience habits and trends, Globo launched in November 2015 the platform Globo Play, which broadcasts the station's regular schedule and offers individual programs on demand. SBT, Record and RedeTV!, in turn, have teamed up to create a joint venture, Newco, to license open channels belonging to the three networks for pay TV and on demand, internet, and VoD platforms, besides other services.

Netflix claims to have surpassed 75 million subscribers worldwide. Its 2015 production, series *Narcos*, was nominated for the Golden Globe Awards 2016 as best TV drama series and best actor in TV drama series, the latter for the interpretation of Brazilian actor Wagner Moura in the role of Pablo Escobar. So far, this is the second most popular series on social networks worldwide.¹¹ Netflix has announced its first Brazilian fiction production for the second half of 2016. Titled *3%*, it stems from a pilot produced in 2010 for a TV Brasil public notice and released in the following year on a YouTube channel. It also offers *telenovela Os Dez Mandamentos* (Record) and other biblical productions of that network.

1.7. Public TV

In 2015, TV Brasil, the only national coverage public television, continued presenting low ratings, a persistent situation since its inception in 2007. In terms of TV fiction, it launched Brazilian series *República do Peru*, which addresses the challenges faced by senior citizens. It has additionally issued a licensing catalog of titles produced or co-produced by the network with Brazilian independent producers and international channels.

¹¹ Cf. <http://rd1.ig.com.br/narcos-e-segunda-serie-mais-comentada-nas-redes-sociais-revela-pesquisa/>. Accessed in March 2016.

1.8. Pay TV

Law n. 12.485 (Law on Pay TV) has been in force for four years now, and there is much to celebrate. Series of outstanding quality were produced in 2015, such as: *Magnífica 70* (HBO), *Zé do Caixão* (Space), *Romance Policial – Espinosa* (GNT) and *O Grande Gonzalez* (Fox).

On the other hand, operators closed the year with 19,399 million subscribers, down 2.8%, the first drop since 2002. This was put down to the economic crisis and the increase in subscription taxes, but the cause may possibly be the competition from over-the-top (OTT) content, distributed online. To face such competition, the segment relies on VoD and TV everywhere¹² services, geared towards audiences that prefer on demand content.

Fiction on pay TV

The number of pay TV channels showing Brazilian fiction remained the same as the previous year: 11 stations, four national and seven international. They aired 27 original fiction productions, five fewer than in 2014. Regarding genres, despite the predominance of comedy, hybrid genres stood out such as *No Divã do Dr. Kurtzman* (Canal Brasil), mixing interview and fiction, and *Segredos Médicos* (Multishow), in which actors and non-actors perform in stories based on real events.

In this Obitel Yearbook 2016 we also started recording Ibero-American fiction within the scope of Obitel shown on Brazilian pay TV. Eight titles were aired on four channels, one national and three international. Below we list the original productions shown on pay TV channels in 2015.

¹² The concept of TV everywhere allows subscribers to access pay TV content anywhere, on any kind of device.

<p>PREMIERE NATIONAL TITLES – 27</p> <p>GNT – 7 titles</p> <ol style="list-style-type: none"> 1. <i>Amor Veríssimo</i> (2nd season) 2. <i>As Canalhas</i> (3rd season) 3. <i>Odeio Segundas</i> 4. <i>Os Homens São de Marte... E É pra lá que Eu Vou</i> (2nd season) 5. <i>Questão de Família</i> (2nd season) 6. <i>Romance Policial - Espinosa</i> 7. <i>Vizinhos</i> <p>Multishow – 7 titles</p> <ol style="list-style-type: none"> 8. <i>Acredita Na Peruca</i> 9. <i>Aí Eu Vi Vantagem</i> 10. <i>Alucinadas</i> 11. <i>Fred e Lucy</i> 12. <i>Os Suburbanos</i> 13. <i>Segredos Médicos</i> (2nd season) 14. <i>Trair e Coçar É só Começar</i> (2nd season) <p>Canal Brasil – 2 titles</p> <ol style="list-style-type: none"> 15. <i>Fora de Quadro</i> 16. <i>No Divã do Dr. Kurtzman</i> <p>Play TV – 1 title</p> <ol style="list-style-type: none"> 17. <i>Os Amargos</i> <p>HBO – 3 titles</p> <ol style="list-style-type: none"> 18. <i>Magnífica 70</i> 19. <i>O Hipnotizador</i> (co-production Brazil/Argentina/Uruguay) 20. <i>Psi</i> (2nd season) <p>Fox – 2 titles</p> <ol style="list-style-type: none"> 21. <i>O Grande Gonzalez</i> 22. <i>Se Eu Fosse Você</i> (2nd season) 	<p>FX Brasil – 1 title</p> <ol style="list-style-type: none"> 23. <i>Na Mira do Crime</i> <p>Space – 1 title</p> <ol style="list-style-type: none"> 24. <i>Zé do Caixão</i> <p>AXN – 1 title</p> <ol style="list-style-type: none"> 25. <i>Santo Forte</i> <p>Sony – 1 title</p> <ol style="list-style-type: none"> 26. <i>Desconectados</i> <p>Warner – 1 title</p> <ol style="list-style-type: none"> 27. <i>Quero Ter Um Milhão de Amigos</i> <p>PREMIERE FOREIGN TITLES (Ibero-American fiction) – 8</p> <p>+Globosat – 4 titles</p> <ol style="list-style-type: none"> 1. <i>Grande Hotel</i> (Spain) 2. <i>Isabel, a Rainha de Castela</i> (Spain) 3. <i>La Reina del Sur</i> (USA, Spain, Colombia) 4. <i>Viento Sur</i> (Argentina) <p>TNT – 2 titles</p> <ol style="list-style-type: none"> 5. <i>Señorita Polvora</i> (Mexico, Colombia, USA) 6. <i>El Dandy</i> (Colombia) <p>Fox – 1 title</p> <ol style="list-style-type: none"> 7. <i>Cumbia Ninja</i> (Colombia) <p>Fox Life – 1 title</p> <ol style="list-style-type: none"> 8. <i>Entre Canibais</i> (Argentina) <p>TOTAL PREMIERE TITLES ON PAY TV (national, imported and co-productions): 35</p>
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Source: Obitel Brazil

1.9. Independent producers

The Law on Pay TV has clearly been a turning point in Brazilian television industry, especially thanks to the great boost given to independent production in Brazil. This segment has already shown significant growth and strong investment in the quality of some

of its productions. The development of the sector has opened up a new labor market with demand for higher levels of qualification. Two immediate consequences can be noted: 1) the increase in internships and technical and specialization courses in areas such as scriptwriting, acting, directing, lighting, special effects etc.; and 2) the enhanced production of series in Brazil. In our view, this new production can progressively (but swiftly) lead to the creation of a "national series culture" in terms of production ("relearning" the format), circulation (distribution via partnerships with international major companies), and consumption (different ways of reaching viewers). This would represent a kind of national response to the global media landscape characterized by "TV transformed".

1.10. International trends

WIT (World Information Tracking) has pointed out five trends in the international television market¹³: super-series, a format between *telenovela* and series; good acceptance of Nordic detective fiction; adaptation of ideas tested in other media (movies, books, video games, comics, etc.); universal storylines, exemplified by the unexpected success of Turkish *telenovelas* in Latin America¹⁴; and investment in international co-productions.

Some of these trends are already identifiable in Brazil. Super-series are present in short *telenovelas* that, since 2011, have been aired on Globo's 11 p.m. slot. International co-productions, although absent in open TV, are exemplified by the aforementioned series *Narcos* (Netflix), a co-production between Brazil, the United States and Colombia, and *O Hipnotizador* (HBO), a partnership between Brazil, Argentina and Uruguay. This series, adapted from homonym Argentinian comics, was an interesting bilingual production (spoken in Portuguese and Spanish) shot in Uruguay with a Latin American cast.

¹³ Cf. <http://mauriciostycer.blogosfera.uol.com.br/2015/06/26/conheca-cinco-tendencias-da-televisao-no-mundo/>. Accessed in March 2016.

¹⁴ For a better idea of this phenomenon, see the chapter on Chile in the Obitel Yearbook 2015.

As for the trend of universal plot fictions, which explicitly refers to Turkish *telenovelas*, it has found a Brazilian home in Band, an erratic broadcaster of fiction. Despite not achieving the great success enjoyed in other countries, such as Chile, we must emphasize that both *telenovelas* displayed in 2015, *Mil e Uma Noites* and *Fatmagül, a Força do Amor*, have increased and consolidated the network's prime time ratings (around 3 points) in a slot fiercely disputed by national fiction productions.¹⁵ The two stories were originally shown in Turkey as series, later adapted to the *telenovela* format to enhance marketing possibilities in Latin countries. The appeal seems to be both the exoticism that brings viewers closer to a remote culture, yet not that different from their own, and the love story, which is traditional, but well told.¹⁶

Also worthy of note on this topic is the 2015 International Emmy Award won by *Império*, for best *telenovela*, and *Doce Mãe*, for best comedy series, both Globo productions. Fernanda Montenegro, for her performance in the latter show, and the dramatic series *Psi*, produced by pay channel HBO, also received nominations.

In short, among the audiovisual data for 2015, we emphasize the predominance of: television as a means of access to content, including on demand; the growing penetration of pay TV, even in a year of economic crisis; the reordering of audience habits, with a marked adherence to mobility and on-demand content; the offer of mobile applications; and the use of multiple screens. These are some points that, in our view, underpin our thesis that, in 2015, we experience a “TV transformed” scenario, especially with regard to Brazilian television fiction.

¹⁵ We will develop this point further, in the topic “Highlights of the year”.

¹⁶ Cf. <http://www.pri.org/stories/2015-05-25/why-some-latin-americans-are-naming-their-children-onur-and-sherezade/>. Accessed in March 2016.

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

Table 1. Fiction broadcast in 2015 (national and foreign; premieres and reruns; and co-productions)

<p>PREMIERE NATIONAL TITLES – 51</p> <p>Globo – 41 titles</p> <ol style="list-style-type: none"> 1. <i>A Cura – Luz, Câmera 50 Anos</i> (telefilm) 2. <i>A Mulher Invisível – Luz, Câmera 50 Anos</i> (telefilm) 3. <i>A Regra do Jogo</i> (telenovela) 4. <i>A Teia – Luz, Câmera 50 Anos</i> (telefilm) 5. <i>Além do Tempo</i> (telenovela) 6. <i>Alto Astral</i> (telenovela) 7. <i>Amores Roubados – Luz, Câmera 50 Anos</i> (telefilm) 8. <i>Amorteamo</i> (series) 9. <i>Animal</i> (telefilm) 10. <i>Anos Dourados – Luz, Câmera 50 Anos</i> (telefilm) 11. <i>As Noivas de Copacabana – Luz, Câmera 50 Anos</i> (telefilm) 12. <i>Babilônia</i> (telenovela) 13. <i>Boogie Oogie</i> (telenovela) 14. <i>Carga Pesada – Luz, Câmera 50 Anos</i> (telefilm) 15. <i>Chapa Quente – 1st season</i> (séries) 16. <i>Dalva & Herivelto. Uma Canção de Amor – Luz, Câmera 50 Anos</i> (telefilm) 17. <i>Dercy de Verdade – Luz, Câmera 50 Anos</i> (telefilm) 18. <i>Dona Flor e Seus Dois Maridos – Luz, Câmera 50 Anos</i> (telefilm) 19. <i>Felizes para Sempre?</i> (miniseries) 20. <i>Força-Tarefa – Luz, Câmera 50 Anos</i> (telefilm) 21. <i>Hoje É Dia de Maria – Luz, Câmera 50 Anos</i> (telefilm) 22. <i>I Love Paraisópolis</i> (telenovela) 23. <i>Império</i> (telenovela) 24. <i>Lampião e Maria Bonita – Luz, Câmera 50 Anos</i> (telefilm) 25. <i>Malhação – 22nd season</i> (soap opera) 26. <i>Malhação – 23rd season</i> (soap opera) 27. <i>Maysa. Quando Fala o Coração – Luz, Câmera 50 Anos</i> (telefilm) 	<p>SBT – 4 titles</p> <ol style="list-style-type: none"> 47. <i>A Mansão Bem Assombrada</i> (unitario) 48. <i>Chiquititas</i> (telenovela) 49. <i>Cúmplices de um Resgate</i> (telenovela) 50. <i>Patrulha Salvadora</i> (series) <p>TV Brasil – 1 title</p> <ol style="list-style-type: none"> 51. <i>República do Peru</i> (series) <p>CO-PRODUCTION TITLES – 0</p> <p>PREMIERE FOREIGN TITLES – 4</p> <p>SBT – 4 titles</p> <ol style="list-style-type: none"> 1. <i>A Dona</i> (telenovela – Mexico) 2. <i>Coração Indomável</i> (telenovela – Mexico) 3. <i>Sortilégio</i> (telenovela – Mexico) 4. <i>Teresa</i> (telenovela – Mexico) <p>RERUN TITLES – 17</p> <p>SBT – 9 titles</p> <ol style="list-style-type: none"> 1. <i>A Feia Mais Bela</i> (telenovela – Mexico) 2. <i>A Usurpadora</i> (telenovela – Mexico) 3. <i>Carrossel</i> (telenovela) 4. <i>Cuidado Com o Anjo</i> (telenovela – Mexico) 5. <i>Esmeralda</i> (telenovela) 6. <i>Maria Esperança</i> (telenovela) 7. <i>Patrulha Salvadora</i> (series) 8. <i>Pérola Negra</i> (telenovela) 9. <i>Rebelde</i> (telenovela – Mexico) <p>Record – 5 titles</p> <ol style="list-style-type: none"> 10. <i>Chamas da Vida</i> (telenovela) 11. <i>Dona Xepa</i> (telenovela) 12. <i>Milagres de Jesus</i> (miniseries) 13. <i>Prova de Amor</i> (telenovela) 14. <i>Rei Davi</i> (miniseries)
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<p>28. <i>Mister Brau</i> (series) 29. <i>Não se Apega, Não</i> (sketch of <i>Fantástico</i>) 30. <i>O Canto da Sereia – Luz, Câmera 50 Anos</i> (telefilm) 31. <i>O Pagador de Promessas – Luz, Câmera 50 Anos</i> (telefilm) 32. <i>Ó Paí, Ó – Luz, Câmera 50 Anos</i> (telefilm) 33. <i>Os Experientes</i> (series) 34. <i>Pé na Cova – 4th season</i> (series) 35. <i>Presença de Anita – Luz, Câmera 50 Anos</i> (telefilm) 36. <i>Sete Vidas</i> (telenovela) 37. <i>Suburbia – Luz, Câmera 50 Anos</i> (telefilm) 38. <i>Tapas e Beijos – 5th season</i> (series) 39. <i>Tim Maia – Vale o que Vier</i> (docu-drama) 40. <i>Totalmente Demais</i> (telenovela) 41. <i>Verdades Secretas</i> (telenovela)</p> <p>Record – 5 titles 42. <i>Milagres de Jesus – 2nd season</i> (mini-series) 43. <i>Milagres de Jesus, o Filme</i> (telefilm) 44. <i>Na Mira do Crime</i> (series) 45. <i>Os Dez Mandamentos</i> (telenovela) 46. <i>Vitória</i> (telenovela)</p>	<p>Globo – 3 titles 15. <i>Caminho das Índias</i> (telenovela) 16. <i>Cobras e Lagartos</i> (telenovela) 17. <i>O Rei do Gado</i> (telenovela)</p> <p>NATIONAL TITLES (premiere): 51</p> <p>TOTAL PREMIERE TITLES (national, foreign and co-productions): 55</p> <p>TOTAL BROADCAST TITLES (premiere and reruns): 72</p>
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In 2015, Brazil had the largest number of **premiere titles** and **broadcast titles** (premiere and reruns) since the beginning of Obitel monitoring ten years ago. The total of 55 premiere fiction productions had been achieved only once before, in 2010. Compared to 2014, there was a 22% increase in the number of **broadcast titles**. Regarding **domestic production**, this increase was more pronounced, around 31%. The number of **imported titles** within the sphere of Obitel, however, fell 20%.

Globo still generates most of the **domestic original production** – 80%. Record comes next, with 10%, followed by SBT, with 8%, and, finally, TV Brasil, with the remaining 2%.

Concerning **reruns**, Record invested in airing *telenovelas* in evening slots, aiming to leverage its ratings, a practice long adopted by SBT.

Table 2. Premiere fiction in 2015: countries of origin

Country	Titles	%	Chapters/ episodes	%	Hours	%
NATIONAL (total)	51	92.7	1927	83.7	1363:45	83.6
OBITEL COUNTRIES (total)	4	7.3	374	16.3	266:35	16.4
Argentina	0	0.0	0	0.0	0:00	0.0
Brazil	51	92.7	1927	83.7	1363:45	83.6
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	0	0.0	0	0.0	0:00	0.0
USA (Hispanic production)	0	0.0	0	0.0	0:00	0.0
Mexico	4	7.3	374	16.3	266:35	16.4
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
TOTAL	55	100.0	2301	100.0	1630:20	100.0
NATIONAL PRODUCTIONS	0	-	0	-	0:00	-
IBERO-AMERICAN CO-PRODUCTIONS	0	-	0	-	0:00	-

In 2015, there were 55 **domestic** and **imported original productions**, against 45 in the previous year, a 22% increase. Despite the increase in products, the number of **chapters/episodes** decreased 3.8%, while the number of hours rose 1.7%. **National productions** totaled 51 titles, up 30% compared to 2014; however, the growth in the number of national fiction **hours** was modest, merely 1.3%, and there was a reduction of 3.4% in the total number of **chapters/episodes**.

These data on domestic production seem to reinforce the trend previously observed in 2014, which we call "cycle of short stories", related to the growing production of short or medium-length titles and the preference for formats such as series, miniseries, telefilms and short *telenovelas*.

Table 3. Co-productions

No co-productions were recorded in Brazilian open TV in 2015.

Table 4. Chapters/episodes and hours broadcast per time slot

Time slots	National			Ibero-American			Total		
	C/E	%	H	C/E	%	H	C/E	%	H
Morning (6 a.m.-12 p.m.)	0	0.0	0:00	0	0.0	0:00	0	0.0	0:00
Afternoon (12 p.m.-7 p.m.)	570	29.6	330:30	374	100.0	266:35	944	41.0	597:05
Prime time (7 p.m.-10 p.m.)	1156	60.0	894:35	0	0.0	0:00	1156	50.2	894:35
Night (10 p.m.-6 a.m.)	201	10.4	138:40	10.2	0	0:00	201	8.7	138:40
Total	1927	100.0	1363:45	100.0	100.0	266:35	2301	100.0	1630:20

Source: Obitel Brazil

Table 5. Formats of national and Ibero-American fiction

Format	National				Ibero-American			
	Titles	%	C/E	H	Titles	%	C/E	H
Telenovela	14	27.5	1505	1118:10	4	100.0	374	266:35
Series	9	17.6	103	58:50	0	0.0	0	0:00
Miniseries	2	3.9	22	15:35	0	0.0	0	0:00
Telefilm	21	41.2	29	39:55	0	0.0	0	0:00
Unitario	1	2.0	1	0:50	0	0.0	0	0:00
Docudrama	1	2.0	2	1:55	0	0.0	0	0:00
Other	3	5.9	265	128:25	0	0.0	0	0:00
Total	51	100.0	1927	1363:45	4	100.0	374	266:35

Source: Obitel Brazil

According to Obitel monitoring (started in 2006), as of 2009, television fiction broadcast at **prime time** is 100% Brazilian, a trend repeated in 2015. **Table 4** shows that **prime time** also concentrates the largest number of chapters, but not the highest number of titles, which occurs in the **night** slot, when short series are usually shown. The **morning** slot, unlike 2014, had no fiction. The **afternoon** slot, in turn, showed increase in both number of chapters and number of hours.

The **night** slot concentrated the largest decrease in both number of **chapters/episodes** and number of **hours**. According to **Table 5**, this decrease is directly linked to the fall in the number of **series** (25%) and **miniseries** (60%) from 2014 to 2015, a consequence of two reasons: the first was Globo's decision to produce a set of 19 **telefilms** as part of the celebrations of its 50th anniversary. The telefilms were produced as *unitarios* (not serialized) and aired in slots traditionally occupied by series and miniseries. The second reason was the debut on Globo of a US series to occupy the slot usually dedicated to domestic production in the second line of Friday shows. Record, probably due to the crisis, opted not to produce its traditional end-of-year *unitarios*.

All 21 **telefilms** aired over the year derive from series and miniseries previously shown on TV: in addition to the 19 titles produced for the project *Luz, Câmera 50 Anos*, also broadcast were the shows *Animal*, derived from the series aired in 2014 on pay channel GNT, and *Milagres de Jesus*, from Record's series, aired as a special end-of-year attraction. Also noteworthy is the presence of a **docudrama**, a format absent from the national production since 2011.

Table 6. Formats of national fiction per time slot

Format	Morn- ing	%	After- noon	%	Prime time	%	Night	%	To- tal	%
<i>Telenovela</i>	0	0.0	3	60.0	10	76.9	1	3.0	14	27.5
Series	0	0.0	0	0.0	1	7.7	8	24.2	9	17.6
Miniseries	0	0.0	0	0.0	1	7.7	1	3.0	2	3.9
Telefilm	0	0.0	0	0.0	0	0.0	21	63.6	21	41.2

<i>Unitario</i>	0	0.0	0	0.0	0	0.0	1	3.0	1	2.0
Docudrama	0	0.0	0	0.0	0	0.0	1	3.0	1	2.0
Other	0	0.0	2	40.0	1	7.7	0	0.0	3	5.9
Total	0	0.0	5	100.0	13	100.0	33	100.0	51	100.0

Source: Obitel Brazil

Despite an increase of 22.2% in the number of *telenovelas* shown at **prime time**, there was a slight decrease (4.9%) of this format at prime time due to three other titles: miniseries *Milagres de Jesus* (Record), series *Patrulha Salvadora* (SBT) and *Não se Apega, Não* (Globo), a sketch from *Fantástico*. Nevertheless, **Table 6** reiterates the hegemony of the *telenovela* format, which accounts for the largest number of original national titles since the start of the Obitel historical series.

As previously mentioned, an atypical fact was the celebration of Globo's 50th anniversary, which resulted in a significant fall in **series** (23.4% decrease compared to 2014) and **miniseries** (down 20.8%) displayed in the **night** slot.

In the **afternoon** slot, there were three 6 a.m. Globo *telenovelas* and two seasons of *Malhação*. The **morning** slot, as has happened since 2010, had no domestic fiction production.

Table 7. Time period in which national fiction is set

Time period	Titles	%
Present	37	72.5
Period	2	3.9
Historical	8	15.7
Other	4	7.8
Total	51	100.0

The **present** setting continued predominating among productions (72.5%). The number of **period pieces** fell once more: only two in 2015, telefilm *Anos Dourados* and *telenovela Boogie Oogie*, compared to three in 2014 and four in the previous two years. **Historical** plots, on the other hand, increased 100%, from four in

2014 to eight in 2015, accounting for 15.7% of shown productions. This is due, once again, to the telefilms shown by Globo – four of them stemming from historical miniseries; the category also includes docudrama *Tim Maia*, telenovela *Os Dez Mandamentos* and *Milagres de Jesus* (miniseries and telefilm). The **other** category includes: telenovela *Além do Tempo*, divided into two phases of equal importance, one in the past and the other in the present; series *Amor-teamo* and telefilms *Hoje É Dia de Maria* and *Dona Flor e Seus Dois Maridos*, which were conceived with timeless features.

Table 8. The top ten most watched titles: origin, rating, share

	Title	Country of original idea or script	Producer	Channel	Scriptwriter or author of original idea	Rating	Share
1	<i>Império</i>	Brazil	Globo	Globo	Aguinaldo Silva	36.658	59.36
2	<i>A Regra do Jogo</i>	Brazil	Globo	Globo	João Emanuel Carneiro	26.892	42.74
3	<i>Babilônia</i>	Brazil	Globo	Globo	Gilberto Braga, Ricardo Linhares, João Ximenes Braga	26.155	42.12
4	<i>Alto Astral</i>	Brazil	Globo	Globo	Daniel Ortiz	25.156	44.1
5	<i>Totalmente Demais</i>	Brazil	Globo	Globo	Rosane Svartman, Paulo Halm	25.019	43.37
6	<i>I Love Parisópolis</i>	Brazil	Globo	Globo	Alcides Nogueira, Mário Teixeira	24.879	40.79
7	<i>Tim Maia – Vale o que Vier</i>	Brazil	Globo, RT Features	Globo	Mauro Lima, Antônia Pellegrino	24.765	49.41
8	<i>Ó Paí, Ó – Luz, Câmera 50 Anos</i>	Brazil	Globo	Globo	Guel Arraes, Jorge Furtado, Mauro Lima, Monique Gardenberg	23.364	44.65
9	<i>O Canto da Sereia – Luz, Câmera 50 Anos</i>	Brazil	Globo	Globo	George Moura, Patrícia Andrade, Sérgio Goldenberg	22.775	46.97
10	<i>Além do Tempo</i>	Brazil	Globo	Globo	Elizabeth Jhin	21.945	39.98
Total productions: 10				Foreign scripts: 0			
100%				0%			

Source: Kantar Ibope Media – 15 Markets – Orbitel Brazil

As usual since the beginning of Obitel monitoring, all top ten titles in 2015 are **national productions** by Globo, notwithstanding the success of *Os Dez Mandamentos* (Record), which, however, came 32nd in the list of most watched fictions shows in 2015.¹⁷

As in the previous year, the first three places are occupied by high prime time *telenovelas* – that is, the three stories aired at 9 p.m. These titles are followed by the trio of complementary prime time fictions, the 7 p.m. *telenovelas*.

In the entire historical series of the Obitel Yearbook, this is the first time that no series belonging to the first line of shows¹⁸ features among the top ten. The most notable absence is *Tapas & Beijos*, which ended in that year and had featured in the top ten since its debut (2011). It should be emphasized, however, that the huge production of telefilms was a determinant factor for the absence of series in the top ten – which is confirmed by the presence of *Ó Paí, Ó* and *O Canto da Sereia*, adapted to the new format. Also noteworthy is the return to the top ten of a 6 p.m. *telenovela*, *Além do Tempo*, which had not happened since 2013.

Table 9. The ten most watched titles: format, length, time slot

	Title	Format	Genre	Number of chap./ ep. (in 2015)	First and last broadcast (in 2015)	Time slot
1	<i>Império</i>	<i>Telenovela</i>	Drama	63	01/01 to 03/14	Prime time
2	<i>A Regra do Jogo</i>	<i>Telenovela</i>	Crime drama	106	08/31 to 12/31	Prime time
3	<i>Babilônia</i>	<i>Telenovela</i>	Drama	144	03/16 to 08/29	Prime time
4	<i>Alto Astral</i>	<i>Telenovela</i>	Romantic comedy	111	01/01 to 05/09	Prime time
5	<i>Totalmente Demais</i>	<i>Telenovela</i>	Romantic comedy	46	11/09 to 12/31	Prime time
6	<i>I Love Parisópolis</i>	<i>Telenovela</i>	Romantic comedy	155	05/11 to 11/07	Prime time

¹⁷ Data provided by Kantar Ibope Media – 15 Markets, 2015.

¹⁸ The slot following the 9 p.m. *telenovela*; the productions are shown on Tuesdays and Thursdays.

7	<i>Tim Maia – Vale o Que Vier</i>	Docudrama	Biographical drama	2	01/01 to 01/02	Night
8	<i>Ó Paí, Ó – Luz, Câmera 50 Anos</i>	Telefilm	Comedy	1	01/14	Night
9	<i>O Canto da Sereia – Luz, Câmera 50 Anos</i>	Telefilm	Crime	1	01/06	Night
10	<i>Além do Tempo</i>	Telenovela	Romance	148	07/13 to 12/31	Afternoon

Source: Kantar Ibope Media – 15 Markets – Orbitel Brazil

Following the trend observed in the previous year, the three most viewed titles in 2015 were dramas, although *A Regra do Jogo* has also an element of crime. Another hybrid genre is present, combining biography and drama, the docudrama *Tim Maia – Vale o que Vier*.

As in 2014, romantic comedies appear in three titles of the top ten, and only one “pure” comedy makes the list. The crime genre, in addition to the aforementioned hybrid model, also appears in *O Canto da Sereia*. Last in the genre list in the top ten comes the romance *Além do Tempo*, which is typical of Globo’s 6 p.m. plots.

As for **format**, the first six places are taken up by *telenovelas*, followed by one docudrama, two telefilms and another *telenovela*. Regarding **time slot**, of the seven *telenovelas*, six were shown at prime time and only one in the afternoon; the other three formats were aired in the night slot.

Table 10. Themes in the ten most watched titles

Title		Main themes	Social themes
1	<i>Império</i>	Power relations, family relations, ambition, exposed identity, self-made man.	Male homosexual affective relations, gender identity, homophobia, child adoption, media scandals.
2	<i>A Regra do Jogo</i>	Organized crime, dualities (social, geographic, cultural, psychological), daily life in the <i>favela</i> , pathological relations.	Organized crime, psychological pathologies, violence against women, socio-cultural mobility.
3	<i>Babilônia</i>	Power relations, envy, assertion of women, homosexual affective relations, life in the <i>favela</i> .	Female homosexual affective relations between senior citizens, corruption, religious strife, bullying.

4	<i>Alto Astral</i>	Psychic powers, sibling rivalry, quest for family origins, class prejudice, criminal misrepresentation.	Spiritualism, charlatanism, prejudice against overweight people.
5	<i>Totalmente Demais</i>	Love quadrangles, fashion world, beauty pageants, clash of interests, on-line scandals.	Fashion culture, social climbing, sexual harassment in the family, workplace competition.
6	<i>I Love Parisópolis</i>	Love across social backgrounds, family relations, life in a São Paulo <i>favela</i> , territory dispute.	Social contrasts, class prejudice, reurbanization.
7	<i>Tim Maia – Vale o que Vier</i>	Biography, Brazilian music scene in the 1960s and 1980s.	Idol culture, religious conversion, drugs, alcoholism.
8	<i>Ó Paí, Ó – Luz, Câmera 50 Anos</i>	Bahia culture, popular culture, daily life.	Religiosity, music culture.
9	<i>O Canto da Sereia – Luz, Câmera 50 Anos</i>	Crime investigation, axé culture from Bahia, fan/celebrity relations.	Homosexual affective relations, religiosity, celebrity making.
10	<i>Além do Tempo</i>	Past lives, karma, historical setting, wine production in the South region.	Spiritualism, racial prejudice, class prejudice, parental neglect.

The recurring **main themes** in the first three titles reveal Globo's high prime time bet on plots connected to major urban centers, depicting life in *favelas* and characters involved in crimes. Partly due to the overuse of the urban violence subject and partly to the low ratings of *Babilônia* and the beginning of *A Regra do Jogo*, the network opted for a strategic change and scheduled for the 9 p.m. slot in 2016 a story with regional colors, proposing to retrieve the so-called “deep Brazil” with *Velho Chico*, by Benedito Ruy Barbosa, which was initially scheduled for the 6 p.m. slot.

Regarding **social themes**, already covered in the topic “Audio-visual context”, we reaffirm the emphasis on religious themes and class and gender prejudice, besides homosexual affective relations.

**Table 11. Audience profile of the ten most watched titles:
gender, age, socioeconomic status**

	Title	Channel	Gender %		Socioeconomic status %		
			Women	Men	AB	C	DE
1	<i>Império</i>	Globo	62.7	37.3	33.0	47.8	19.2
2	<i>A Regra do Jogo</i>	Globo	61.8	38.2	32.6	48.2	19.2
3	<i>Babilônia</i>	Globo	62.9	37.1	32.9	48.4	18.7
4	<i>Alto Astral</i>	Globo	65.4	34.6	30.0	48.3	21.7
5	<i>Totalmente Demais</i>	Globo	66.0	34.0	32.9	48.4	18.7
6	<i>I Love Paraisópolis</i>	Globo	65.6	34.4	30.5	49.9	19.6
7	<i>Tim Maia – Vale o que Vier</i>	Globo	59.9	40.1	37.5	46.4	16.1
8	<i>Ó Paí, Ó – Luz, Câmera 50 Anos</i>	Globo	60.3	39.7	28.9	49.2	21.9
9	<i>O Canto da Sereia – Luz, Câmera 50 Anos</i>	Globo	62.5	37.5	33.5	47.5	19.0
10	<i>Além do Tempo</i>	Globo	68.6	31.4	34.2	47.5	18.3

	Title	Channel	Age group %					
			4 to 11	12 to 17	18 to 24	25 to 34	35 to 49	50+
1	<i>Império</i>	Globo	6.5	7.3	8.4	15.8	24.3	37.7
2	<i>A Regra do Jogo</i>	Globo	5.8	7.3	8.3	15.9	24.5	38.2
3	<i>Babilônia</i>	Globo	5.6	6.9	8.3	15.3	24.2	39.7
4	<i>Alto Astral</i>	Globo	6.6	8.0	7.9	13.8	23.6	40.1
5	<i>Totalmente Demais</i>	Globo	6.5	7.9	7.7	14.6	23.7	39.6
6	<i>I Love Paraisópolis</i>	Globo	6.9	8.7	8.0	14.4	22.8	39.2
7	<i>Tim Maia – Vale o que Vier</i>	Globo	5.6	6.4	9.2	16.7	25.6	36.5
8	<i>Ó Paí, Ó – Luz, Câmera 50 Anos</i>	Globo	6.8	9.0	10.4	17.2	25.8	30.8
9	<i>O Canto da Sereia – Luz, Câmera 50 Anos</i>	Globo	6.4	8.5	9.6	16.6	26.6	32.3
10	<i>Além do Tempo</i>	Globo	5.7	8.0	7.9	13.3	22.4	42.7

Women continue to dominate the audience of the fiction shows among the top ten, accounting for over 60% of viewers, with a preference for romantic comedy in the 6 p.m. to 7 p.m. *telenovelas*. Among men, biographical drama (docudrama *Tim Maia*) and comedy (television film *Ó Paí, Ó*) were the most popular genres, followed by drama (*telenovelas A Regra do Jogo* and *Império*). This difference reaffirms the now traditional preferences between men and women.

Among young adults (18 to 24 and 25 to 34 years old), telefilms were the most watched, as well as the docudrama, while the 7 p.m. *telenovelas*, addressed to this audience, come after the 9 p.m. stories in order of preference. Interestingly, the 7 p.m. *telenovelas* feature among the preferences of the over 50 age group, accounting for three out of the four most viewed shows.

Concerning socioeconomic status, class C is still the largest audience of TV fiction, and the 7 p.m. *telenovelas* are their favorite products. Among classes AB, the 6 p.m. *telenovela* (*Além do Tempo*) occupied a prominent place, followed closely by telefilm *O Canto da Sereia* and *telenovela Império*, suggesting a preference of this audience for dramas and denser plots. Finally, among classes DE, lighter stories – telefilm *Ó Paí, Ó* and *telenovela Alto Astral* – reached higher viewing percentages.

3. Transmedia reception

Monitoring user-generated content (UGC) over the internet has become increasingly important in Brazil, given that the impact of television shows can be measured by the issues discussed on the internet, sometimes surpassing the significance of audience ratings. Twitter has proven to be, in recent years, the preferred platform for fans of television fiction to talk about their topics of interest. The creative universe conceived by fans is pervaded by phenomena that have been gaining strength across multiple platforms – with greater or lesser intensity, according to the digital scene – in which stand out memes, remixes, fanfics, etc. All these phenomena result from fans coming together in networks via hashtags, one of the main tools used by these audiences to discuss matters of interest and share internet content, enabling other fans to identify themselves via those keywords.

Authors like Deller (2011) point out that, although we have studies on how television audiences use the internet to discuss favorite programs (Baym, 2000; Jenkins, 2006; Ross, 2008), systematic and permanent monitoring of audience behavior is essential, since we are dealing with on-line practices that are continuously re-

shaped, requiring the analysis of TV response expressed in networks like Twitter, as Obitel started doing in 2010.

According to data from Kantar Ibope Media for 2015¹⁹, television fiction (comprised of *telenovelas*, series and miniseries) ranked **first** among the most discussed topics on Twitter, closely followed by reality shows. In the list of the 20 shows broadcast on open TV with more publications on this platform over the year, *telenovelas Verdades Secretas* (Globo) and *Império* (Globo) were the fiction titles²⁰ with the most tweets and impressions.²¹

The terminology adopted by Kantar Ibope Media stems from the methodology used for measuring and processing these data.²² The annual measurement from these metrics considers all programs shown by open TV broadcasters with nationwide coverage (except for sports broadcasts), and uses the tool Public ITTR to define the weekly ranking of the ten most prominent television shows on Twitter. The position of the programs in the list of most commented titles on Twitter is based, first of all, on the total number of impressions²³, followed by the other metrics.

Carrying out a detailed analysis of data provided by Public ITTR, we observed that the level of engagement²⁴ of *Império* reached

¹⁹ Cf. <http://www.kantaribopemedia.com/no-brasil-reality-shows-dominam-as-conversas-sobre-tv-aberta-no-twitter/>. Accessed in March 2016.

²⁰ For a quantitative idea of that impact, the last chapter of *Verdades Secretas* had 1,354,785 tweets and 26,510,866 impressions, while *Império* totaled 560,000 tweets and 18,900,000 impressions.

²¹ According to Kantar Ibope Media, the total number of impressions should be interpreted as the number of times that messages related to a given program were actually seen (when the user was "impacted" by the content), which enables a more accurate view of the impact of television content, since having many references, after all, does not necessarily measure success.

²² The metrics adopted are: Twitter Total Impressions: number of times the tweets related to a program were displayed during its broadcast; Twitter Unique Audience: number of different Twitter accounts that viewed at least one message related to a particular program during its broadcast; Tweets: total number of mentions related to a particular program during its broadcast.

²³ According to Kantar Ibope Media, it has not been possible yet to analyze whether these impressions are positive or negative.

²⁴ Measured based on the combination of activity metrics – messages and authors – and impact metrics – impressions and unique audience.

its peak in the second week of March 2015, when it obtained a total of 18.9 million impressions on Twitter, 550,000 unique audiences, 560,000 tweets (mentions) and 133,000 unique authors participating in this repercussion.

Império featured among the 10 most talked topics over five weeks, many of them coinciding with the final phase of its broadcast in mid-March 2015. *Verdades Secretas*, in turn, featured in this ranking for 15 weeks, considering that it was displayed in full in 2015. In quantitative terms, we note that the latter title reached a total of 26.5 million impressions on Twitter, 481,000 unique audiences, 1.4 million tweets (mentions) and 173,000 unique authors in the penultimate week of September, which also coincides with the story's last week on air, confirming the trend of increasing repercussion as the shows approach their end.

On the other hand, we observed that although *Verdades Secretas* was one of the most discussed topics on Twitter in 2015²⁵, this fiction did not feature in the list of titles with the largest number of viewers.

Fan networks and “fic-hashtags”

Considering the remarkable importance of Twitter as a content-sharing space, the choice of this network as a platform of interest for our analyses in recent years is also supported by relevant social practices, such as conversations about fiction shows carried out simultaneously to their display on multiple screens (Doyle, 2010). We are particularly interested in observing both the fictions with greater impact on networks and the most discussed topics stemming from these titles. Therefore, our initial interest naturally focuses on the keywords making up a hashtag, which we will dub “fic-hashtag” – a hashtag of television fictions used by fans to index the content of the conversations.

²⁵ As indicated by a survey commissioned by Twitter. Cf. <http://rd1.ig.com.br/verdades-secretas-e-masterchef-dominaram-o-twitter-em-2015-revela-pesquisa/>. Accessed in March 2016.

We found that the main fic-hashtags used by Brazilian fans on Twitter in 2015 – especially those reaching the trending topics – were: #VerdadesSecretas; #Império (including shipping of the #Alfredisis couple²⁶); #SomosTodosPaollaOliveira; #NãoEstouDisposta; #Mar-Vermelho. These fic-hashtags show how fans can be creative, since many are not limited to indexing content (especially memes) via the fiction’s title, but also create linking systems with names of their own invention, as is the case of the fic-hashtag referring to the striking semi-nudity scene by actress Paolla Oliveira in the miniseries *Felizes para Sempre?* (Globo) and the meme created to illustrate the expression of the protagonist of *Babilônia*, “Não estou disposta” (I’m not in the mood), which went viral on social networks.

Regarding the fic-hashtag #VerdadesSecretas, the metrics pointed to 146 knots (tweets that used this hashtag) connected via 106 edges. Each post is connected by at least one edge, but not all have the same number of links. Compared with the number of connected components (45), we note a high degree of connectivity of certain posts (some with up to 32 edges), showing that some fans have more influence on the network than others. In conclusion, we found that the UGCs are becoming increasingly indexed via fic-hashtags, which are of great importance in identifying the most active fans of TV fiction in social networks.

Images of the fic-hashtag #VerdadesSecretas on Twitter



²⁶ Shipping was analyzed under “Transmedia reception” in the Obitel Yearbook 2015.

4. Highlights of the year

To develop the hypothesis formulated in 2014 concerning the “cycle of short stories”, we have provided a comparative chart focused on the variation in Brazilian production. What initially stands out is the extraordinary increase in the number of short stories, the result of an unusual circumstance, namely, the telefilms aired by Globo to celebrate its 50th anniversary. However, a more detailed analysis reveals that, despite cutting costs due to the economic crisis, broadcasters still view short stories as a viable form of investment.

*Telenovelas and series*²⁷: Brazilian production in the last three years

BROAD-CASTERS	GLOBO		RECORD		SBT		BAND		TV BRASIL	
	<i>Tele-novela</i>	Se-ries	<i>Tele-novela</i>	Se-ries	<i>Tele-novela</i>	Se-ries	<i>Tele-novela</i>	Se-ries	<i>Tele-novela</i>	Se-ries
2013	9	9	3	1	2	0	0	0	0	0
2014	10	12	2	3	1	4	0	0	0	2
2015	10	28	2	3	2	2	0	0	0	1
TOTAL	29	49	7	7	5	6	0	0	0	3

In 2015, Globo aired the series *Os Experientes*, co-produced with O2 Filmes. Also prominent were multiplatform initiatives in association with Globosat channels (pay TV), which resulted, for example, in the production of *Odeio Segundas* (GNT). Record, more used to partnerships to produce its end-of-year shows, commissioned the second season of the miniseries *Milagres de Jesus* to the producer Academia de Filmes; in partnership with Fox group (pay TV), the network produced *Na Mira do Crime* as a series and telefilm; at the end of the year, it virtually outsourced all its entertainment, handing over the production of *telenovelas* to Casablanca, such as the new season of *Os Dez Mandamentos* and *Escrava Mãe* (not released in 2015).

²⁷ “Series” here means short stories in general: series, miniseries, telefilms and *unitarios*.

This model of co-production – successfully adopted in the pay TV segment, spurred by Law n. 12.485 – tends to gain ground in open TV. For 2016, SBT is producing, in partnership with Fox and producer Mixer, series *A Garota da Moto*; Band, in turn, shares the costs of series *Terminadores* with TNT and producer Hungry Man. This seems to be the beginning of an interesting dialogue between open and pay channels, mediated by independent producers that spur and invigorate the market, similarly to what occurred in the US in the 1960s and 1970s. The latter was marked by the effervescence of independent producers, which later sparked a process leading to the consolidation of the audiovisual market, the emergence of numerous channels and production of remarkable quality (Curtin and Shattuc, 2009).

We do not intend to “transplant” one context to another, but look for similarities. Over and above business models, we have long been pointing to a diversification of themes and approaches in Brazilian television fiction, recording phenomena unique to the country. In 2015, for example, *telenovelas* such as *A Regra do Jogo* and *Verdades Secretas*, which opted for a form of episodic narrative similar to series, produced mixed results: while the latter was hailed by audiences and critics, the former faced serious competition from *Os Dez Mandamentos*, an extremely traditional *telenovelas* in narrative format. The coexistence of these different forms of production and response (contemporary and anachronistic) resounds in analyses of authors such as García Canclini (2003) and Martín-Barbero (2008), who define them as a trait of the “non-contemporary modernity” present in Latin America.

Starting out from basic vectors related to a “series culture” (Silva, 2014) and grounded in the tension between traditional and modern, latent both in terms of content, in the development of new narrative models challenging the continuity and remodeling of traditional models, and of consumption, in new and old TV fiction viewing habits, we consider this to be a moment of transition in which we glimpse a path towards “TV transformed” in Brazil.

Luz, Câmera 50 Anos Festival

As part of the celebrations of its anniversary, Globo launched the project *Luz, Câmera 50 Anos*, adapting some of its most successful series and miniseries into telefilms. Nineteen telefilms were produced and aired, each one running to approximately 90 minutes.²⁸

As noted, despite the intention of recalling great moments in the broadcaster's history, the criteria to choose fictions for the project lacked precision. Re-editing criteria were also loose, and some works did not have all their chapter and episodes adapted.

Also worth mentioning, among the celebrations of Globo's 50th anniversary, is the release of the sticker album *50 Anos de Novelas (50 Years of Telenovelas)*, which sparked a veritable collecting fever among fans.

The success of *Os Dez Mandamentos* and the establishment of “niches” in open TV

One of the fiction productions of greater impact in 2015 was *Os Dez Mandamentos*, Record's first biblical *telenovela*. Dramatizing the saga of Moses, the show at times managed to beat Globo's ratings in its final stretch in the same slot (8:30 p.m.-10 p.m.).²⁹ The peak was reached with the chapter on the parting of the Red Sea, making the hashtag #MarVermelho on Twitter appear among worldwide trending topics.³⁰

²⁸ In January 2015, 12 full-length features were aired based on the homonym fictions *O Canto da Sereia* (2013), *O Pagador de Promessas* (1988), *Força-Tarefa* (2009 to 2011), *Maysa* (2009), *A Teia* (2014), *Ó Paí, Ó* (2008 to 2009), *Dalva & Herivelto* (2010), *Presença de Anita* (2001), *As Noivas de Copacabana* (1992), *Dercy de Verdade* (2012), *Lampião e Maria Bonita* (1983) and *Anos Dourados* (1986). April, month of the broadcaster's anniversary, marked the beginning of the festival's second season, in which seven two-part telefilms were aired: *Amores Roubados* (2014), *Carga Pesada* (2003/2007), *A Cura* (2010), *Dona Flor e Seus Dois Maridos* (1998), *Suburbia* (2012), *A Mulher Invisível* (2011) and *Hoje É Dia de Maria* (2005).

²⁹ Cf. <http://www.kantaribopemedia.com/ranking-semanal-15-mercados-09112015-a-15112015/>. Accessed in March 2016.

³⁰ Cf. <http://cultura.estadao.com.br/blogs/cristina-padiglione/e-o-mar-vermelho-se-abriu-na-record-para-alivio-da-globo-sera/>. Accessed in March 2016.

Without detracting from the merits of this biblical production, the whole phenomenon must be viewed in the context of the reaction of a conservative audience to the relationship and gay kiss between two middle-aged women in one of the plots of *Babilônia*, Globo's prime time *telenovela*.

Looking beyond this audience phenomenon, we believe that the success of *Os Dez Mandamentos* follows the trend of the creation of niches in open television pointed out by us in the 2015 Obitel Yearbook, where we identified the establishment of the *religious niche* by Record. The network, building on a tradition of biblical miniseries, ably invested in a longer format, the *telenovela*, assigning it to the 8:30 p.m. slot, which has lately become the most competitive in Brazilian TV. In the same Yearbook we also identified the *children's niche* of SBT, which, since 2012, has consolidated its *telenovelas* for this age group. Despite the success of *Os Dez Mandamentos*, *Chiquititas* (SBT) did not record a significant drop in audience viewing, and its replacement, *Cúmplices de um Resgate*, maintained the level of ratings. Also noteworthy was SBT's successful rerun of *Carrossel* right after its original children's *telenovelas*. Band, as mentioned in the "Audiovisual context", started investing in Turkish *telenovelas* in the same slot, first with *Mil e Uma Noites* and then with *Fatmagül*.

The *Os Dez Mandamentos* phenomenon prompted Record to produce a new season of the *telenovela*, opting to rerun biblical miniseries before the premiere in April 2016. The broadcaster has also launched two books based on the show's story and a feature film compiling the whole plot; this allows the station to take advantage of its religious niche fiction, like SBT exploits children's fiction by releasing licensed *Chiquititas* products and a movie based on *Carrossel*.

Mister Brau

Replacing *Tapas & Beijos* (Globo) in the night slot, comedy series *Mister Brau* (Globo) was warmly welcomed, catching the at-

tention of the international media: British newspaper *The Guardian* hailed it as the first Brazilian TV fiction starring a rich black couple in the leading roles.³¹ Combining humor and music (the protagonists are successful pop stars), the series addresses themes such as racism and class prejudice with sensitive and intelligent social criticism, enhanced by laughter. The plot focuses on the culture and class clash caused by “upstarts” Brau and Michele with their neighbors in an upscale condo, “a reflection of the social changes the country has undergone in recent years”.³²

5. Theme of the year: (re)invention of TV fiction genres and formats

The recurrent debate on television genres and formats raises questions about the parameters used to define these terms. In the words of Martín-Barbero (2008), prior to categorizing narratives, genres occupy a place *outside* the work, from which the meaning of the narrative is produced and consumed. They are, therefore, *strategies of communicability*, understood in both esthetic and cultural dimensions. Formats, in turn, are associated with a *ritualization of action*, which, created by narrative modes and also by industrial factors and marketing strategies, gives rise, in its various forms, to a *family of stories*.

The methodology adopted by *Obitel* is based on these guidelines. It focuses on TV fiction genre, which is executed in different formats: *telenovela*, series, miniseries, telefilm, *unitario*, among others. Superimposed to the formats are the fictional genres as categories of narrative: drama, comedy, action, adventure, horror, crime, etc.

According to Balogh (2002), in the case of television, each cultural context has developed and established among audiences its own combinations of TV genres and formats of preference. In the US, the

³¹ Cf. <http://www.theguardian.com/world/2015/oct/07/brazil-television-mister-brau-black-couple-race-issues>. Accessed in March 2016.

³² *Idem*.

traditional prime time format is a series: the drama show, between 45 and 60 minutes, and the 30-minute sitcom. In Latin America, on the other hand, where television was strongly influenced by the tradition of radio and serialized novels, the melodramatic *telenovela* became its main fiction genre.

We know that the *telenovela* has developed in different ways in different regions of Latin America.³³ In Brazil, it established itself over time as the most watched and recognized format by audiences for regularly echoing social changes, becoming ingrained in the country's culture.

The Brazilian *telenovela* is, in essence, a compound of genres. Generally speaking, it is founded on a main dramatic plot, marked by the difficult resolution of a romantic and/or moral conflict; around this revolve several subplots, also called cores, each constructed from various genres. Usually there is humoristic core, and an additional one with more action or mystery. They are usually called parallel plots – which are not exactly “parallel”, since they are supposed to interact with the main plot, helping the story progress as a whole. Thus, Brazilian TV viewers are used to following several simultaneous storylines in a single narrative fiction.

Moving on to other Latin American countries, we find variations in *telenovela*, for example, those with more than one “season” (a concept common to series), like *El Señor de los Cielos*³⁴, a co-production between the US, Mexico and Colombia. This *telenovela* format, however, is not totally unfamiliar in Brazil. Cases in point include: *Chiquititas* (SBT, 1997-2001), shown over five seasons; trilogy *Os Mutantes* (Record, 2007-2009); and *Os Dez Mandamentos*, whose second season is scheduled for 2016. There are also variations in other formats, some of them based on semantic issues. In the continent's Spanish-speaking countries, for example, “uni-

³³ Mazziotti (1996) identifies six major *telenovela* production models in Latin American TV: Brazilian (Globo), Mexican (Televisa), from Miami (USA), Argentinian, Venezuelan and Colombian.

³⁴ Premiered in 2013, *El Señor de los Cielos* aired its third season in 2015, with a fourth season scheduled for 2016.

tario” refers to a series formed by episodes that are completely independent from one another, linked by a common theme – by these parameters, an example of *unitario* would be *As Cariocas* (Globo, 2010). In Brazil, it means a fiction composed of only one episode, approximately one hour long, and therefore is a non-serial fiction format.

Also noteworthy in Brazil is the fact that two formats, *unitario* and telefilm, are traditionally linked to special schedules, such those conceived for the celebrations of Globo’s 50th anniversary or aired at the end of the year, when broadcasters often test new productions (pitching), aiming to include them in the following year’s programming.

Industrial factors and marketing strategies, as mentioned above, should also be taken into consideration. A recent example is *Milagres de Jesus*, released by Record as a miniseries; its episodes, however, were completely independent of each other, each with a different cast, narrating the story of a person blessed with a miracle by Jesus. Another example is the variation of the miniseries format, since the terms microseries and macroseries are never used by producers.

Reconfiguration of Brazilian TV fiction genres and formats in recent years

Set in the context of digital technologies and the phenomena of cultural globalization, and subject to rapid changes in production, circulation and response, television fictions have experienced a convergence of elements that have enabled the emergence of new configurations of genres and formats. Fictional content on multiple screens and different platforms has been perceived as a trend since the beginning of the *Obitel* historical series, more prominently as of 2010, by in-depth analyses of transmedia response. The latter have proved it possible to view how transmedia narratives permeate the various devices, transforming people’s ways of perceiving and watching fiction. No longer stuck to a programming schedule, view-

ing hours become fluid via the use of various screens. These vectors will increasingly affect production, including the creation and design of narratives, and circulation, via new formats and platforms.

In this scenario, the most discussed issues in recent times relate to complex narratives. Mittell (2006) points out that the complexity seen in the titles of "TV transformed" in US television is mainly based on the *hybridization* of the two traditional forms of seriality: the *serial*, a continuous, chapter-based form, in which a great dramatic arch spans the entire narrative, and the *series*, an episode-based form, wherein the arches do not exceed the unit of an episode.³⁵

We aim below to position Brazilian television fictions within this context.

Since the 2000s, we have observed such hybridization in several titles. As early as 2003, *telenovelas* *Mulheres Apaixonadas* and *Kubanacan*, both of them Globo productions, had several plots³⁶ developing in parallel to the main storyline, providing a dynamic flow of stories and characters and agility of action.³⁷ The latter show, aired at 7 p.m., also included a wide range of genres³⁸ in which the main characters moved between romantic comedy, drama and thriller, while the remaining plots – many verging on satire, since the story was set in a fictional Latin American dictatorship in 1950s and 1960s – ranged from melodrama to comedy, in various shades.

Over ten years of highlighting in the *Obitel* Yearbooks the fictions of each year, we have made observations on these new and increasing convergences between genres and formats in national

³⁵ A significant handicap in Brazil is the lack of distinction between these two formats, for both producers and consumers.

³⁶ Plot here is used in the sense defined by Campedelli (1987:45-46): "an event around which the characters will orbit". It should be noted that the author considered *telenovelas* as *multiplot* due to the great amount of events required by the format's length.

³⁷ It is noteworthy that *narrative acceleration*, apart from being an esthetic option related to the narrative style of individual authors, is a trait more directly linked to the condition of contemporaneity, rather than to series.

³⁸ Balogh (2002:94) alludes to "bricolage of genres and sub-genres", which fits well the aforementioned example.

productions. In 2010, we emphasized the innovations introduced by series *Norma* (Globo, 2009) in creating interactivity with an audience that, present in an auditorium, would decide the course of the plot. Such high degree of innovation, however, seems not to have been well assimilated, and the network canceled the series after only three episodes.

In 2011, *O Astro* (Globo) was the first *telenovela* aired in the new 11 p.m. slot, which was mainly dedicated to remakes and adaptations of famous *telenovelas* in a shorter format (average of 70 chapters). We defined it as an experimental work destined for the international market, which coincidentally received the International Emmy Award in 2012 for best *telenovela*. The narrative of this fiction was developed episodically: each chapter had a plot, a main event whose unfolding affected, besides the story's protagonists, characters of different subplots. This event reached a resolution at the end of the chapter, provoking a new situation, thus establishing the hook and the plot of the following chapter.

In this timeline we are sketching through the chapters of Brazil written in *Obitel Yearbooks*, the storylines by João Emanuel Carneiro also stand out. In the *Obitel Yearbook 2009*, we stressed that *telenovela A Favorita* (2008) included several format innovations, such as exploiting the thriller genre – despite the authorship of the crimes being revealed in the second month – and the intense rhythm of the narrative, which prompted several plot twists in the story even before the end of the show. Miniseries *A Cura* (Globo, 2010), according to the *Obitel Yearbook 2011*, followed the time frame of a series, i.e., a weekly, and not daily, format, leading to thematic and structural changes in scripting and editing, and creating hooks of greater dramatic intensity, besides other editing procedures. The phenomenon *Avenida Brasil* (Globo, 2012), in turn, presented the convergence of drama, thriller and comedy. As stated in the 2013 *Obitel Yearbook*, the agile action and dialogue were combined with a *telenovela* technique of 1970s and 1980s, that of using strong dramatic hooks at the end of each chapter, a clear example of exploit-

ing pre-existing techniques in the creation of a model suitable to contemporaneity.

As already highlighted, the year 2015 projects an interesting scenario for the future, enabling the development of a (new) period of esthetic experimentation by creators. Not coincidentally, this year witnessed the emergence of two of the best examples of balance between serial and series. *A Regra do Jogo*, also written by João Emanuel Carneiro, created an explicit tension between chapter and episode: each chapter was numbered and given a title alluding to the events of the day, linked to the main plot. Likewise, *Verdades Secretas*, Globo's 11 p.m. show by Walcyr Carrasco, made good use of both the *telenovela* format, creating strong hooks at the end of each chapter, and the series format, related to the unfolding of events in each core. Also stressed was the agility of the plot in its shorter time frame, as well as the esthetic quality achieved by the direction.

With the examples above we aimed to demonstrate that the combination and recombination of well-established genres and formats to explore new narrative possibilities is now a global trend, intrinsically associated to ongoing socio-cultural and technological transformations. This leads us to agree with Mittell (2004) with regard to studies on television genres, since it is necessary to consider how they are currently experienced, deepening the relations between programs and audience and, especially, freeing them from the fetters of the television industry. In these dynamic inter- and trans-genres, the formats are also transfigured, perhaps even more so due to their technical nature.

Studies on television genres, therefore, should address both the private (or local) and the universal (or global) and never become detached from cultural practices. In this context, and considering the inexhaustible nature of the topic, there is need for innovative research of Brazilian television fiction, from both a historical perspective and in the dialogue with contemporaneity, forecasting the impact in coming years of the (re)invention of genres and formats.

This chapter demonstrated that Brazilian television fiction is in constant dialogue with globally perceived trends. It also clearly revealed the need for this dialogue to be developed among international studies and those stemming from the Brazilian context, in which the *telenovela* – and television itself – has a complex nature and role that must be known and incorporated for the benefit of the scope of international genre studies.

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CHILE: THE CONSOLIDATION OF THE CRISIS OF PUBLIC TV¹

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1. Chile's audiovisual context in 2015

The Chilean television industry presented very different, and in some cases even contradictory, results for fiction. Firstly, the crisis of TVN, the public channel – once the unchallenged leader in this area –, deepened. The year ended with negative figures for the station and the departure of its executive director. Secondly, Mega, the first channel that brought Turkish *telenovelas* to Latin America, consolidated the loyalty of audiences during 2015, fulfilled the promise of airing Chilean *telenovelas* and became, as well as in 2014, leader in rating. Despite the crisis of TVN and its general poor results, the public channel managed to present one of the most noteworthy products produced by Chilean television. The public signal participated, with a secondary percentage, in the co-production of the series *Sitiados*, along with Fox International Channels and the independent producer Promocine. Its broadcasting had a rating of eight points, in a context in which TVN did not exceed many times the five points of audience in its fiction production.

¹ The authors wish to express their gratitude towards the company Kantar Ibope Media Chile, without which invaluable help this work would not be possible.

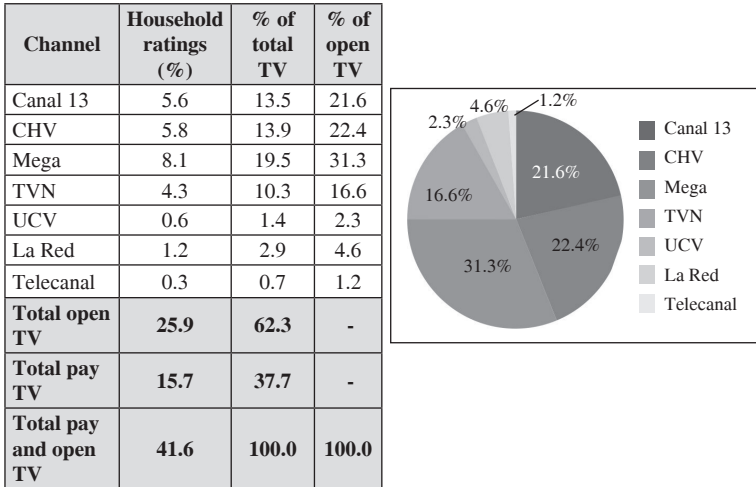
1.1. Open TV in Chile

Chart 1. Open TV national stations

Private channels (6)	Public channels (1)
Canal 13 Chilevisión La Red Mega Telecanal UCV	TVN
Total number of channels: 7	

The structure of the industry did not have variations regarding the previous year: during 2015, the process of granting of channels for digital transmission did not begin and the experimental broadcastings of stations that requested them to the cities of Santiago, Valparaíso and Concepción continued.

Graph 1. TV audience by channel in 2015²



Source: Kantar Ibope Media Chile

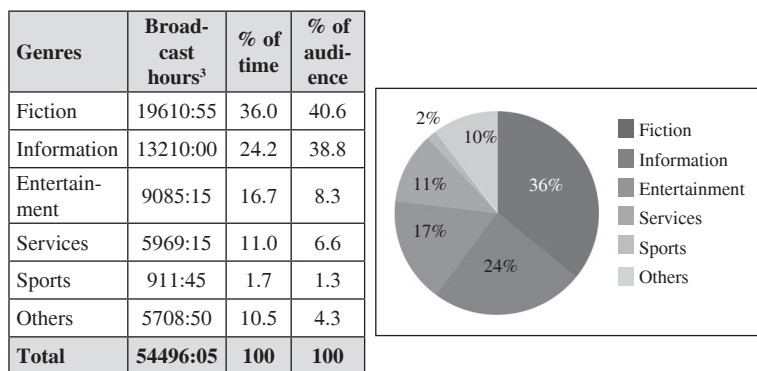
Graph 1 shows the deepening of the phenomena observed during 2014: Mega consolidated the leadership it conquered, TVN ag-

² 24 hours a day household rating.

gravated its crisis and pay television continued its advance, albeit at a slower pace than in previous years. The order of positions is the same of 2014, but the distances increased.

When it changed its ownership, Mega forged its leadership based on a plan that included large investments, such as the construction of studios, the purchase of rights of transmission of the national soccer team matches and the installation of a robust area of fiction production. The channel has persevered in that plan, to the extent that it is possible to wonder if it is not taking too many risks. It has hired the major acting figures, which were formerly in TVN, but also brought in key personnel of Canal 13. If the results begin to decrease, Mega will have to support a channel much more expensive than the one of a couple of years ago. However, so far it has gone well. In 2015, Mega was the only channel with utilities, reaching a record of about US\$ 15 million, doubling the previous year. At the other end, TVN suffered a loss record of approximately US\$ 37 million.

Graph 2. Offer by genre in TV programming in 2015



Source: Kantar Ibope Media Chile – Orbitel Chile.

³ For presentation purposes, the times on this and the following tables are rounded to five minutes.

Comparing Graph 2 with its simile of 2014, it is clear that, at a general level, screen composition was very stable, regarding the genres of broadcast contents and the reception they had from the audience.

Possibly the least intuitive of these data is the position occupied by sports, particularly soccer. Some of the most watched programs of the year are important soccer games. However, at an aggregate level, soccer is irrelevant due to the short time on screen occupied by the transmission of sports programs and events. One element that nuances that statement is that soccer occupies an important place inside newscasts.

1.2. Audience trends in 2015

The surprise represented by the Turkish landing in 2014 resembled to an army of occupation in 2015: there were 11 Turkish *telenovelas* on screen. Although the results were quite dissimilar – *La Rosa Negra* on Canal 13 and *Tormenta de Pasiones* in CHV were taken off screen because of their poor results –, five of them could have been in the top ten of this report if it was not restricted to Latin American titles. This reflects that what happened in 2014 was not something exceptional and anecdotal. The space occupied by the *telenovela* in the expectations of Chilean audiences is not restricted to Latin American products, as once thought, but is open to anyone who can correctly interpret the genre's keys.

Another highlight is that the turning on of open television at prime time increased by approximately 10%, in contrast with pay television, which decreased in the same time slot. As open television is traditionally the privileged space for Latin American fiction, and in particular Chilean, this evolution suggests a better reception of contents and, at the same time, a better platform to deliver these products to its audience.

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

Official advertising data in Chile for 2015 are not yet available, so the analysis must be done with information of the previous

period, 2014. The figures continued the downward trend from 2013: advertising investment in open TV showed a decrease of 10.5%, although it continued to be the preferred media to invest in, with a share of 40.6% of TV in the medial advertising cake, up to US\$ 493 million. This decrease in advertising investment in television has been the largest in the last ten years.⁴

Executives of the advertising industry explained this remarkable decline by the poor performance of the economy, the expectations arising from global trade and the reforms that were emerging in the sectors of education and work.⁵ However, they were optimistic about 2015, expecting a recovery regarding the situation of the previous year.

1.4. Merchandising and social merchandising

As in the previous year, the use of fiction as an instrument of communication support for policies or public action programs has no significant presence in Chile. A practice regularly incorporated in recent years is product placement in fiction as a resource to obtain commercial financing. However, there were no innovations during 2015.

1.5. Communication policies

The regulations for the implementation of digital terrestrial television in Chile were published in April 2015. The document establishes the deadlines for each of the free-reception open television channels to request a concession, and a timetable for the deployment of the signal in Chilean territory. It is expected that, in 2017, the national channels may be present in all the regional capitals of the country. The objective is to make the final analogue switch in 2020.

⁴ Achap (2015). Inversión publicitaria en medios 2014. *Achap*. Retrieved from: http://www.achap.cl/documentos/Inversion_Publicitaria_Achap_2014.pdf.

⁵ Sanchez, J. (2015). Ignacio del Solar: este año será mejor en inversión publicitaria que el 2014. *Pulso*. Retrieved from: <http://www.pulso.cl/noticia/empresa--mercado/empresa/2015/01/11-56361-9-ignacio-del-solar-este-ano-sera-mejor-en-inversion-publicitaria-que-el-2014.shtml>.

One of the events that can be considered a milestone is the transmission of the Copa America 2015, which took place in Chile. The event was broadcast from all the regional capitals of the country thanks to an agreement between the public station, TVN, the Regional Association of Television (Aretel, in Spanish) and Movistar, which carried the signal to the regional stations, providing them with antennas and set-top boxes to emit the signal from their digital transmitters.⁶

According to the Undersecretariat of Telecommunications (Subtel, in Spanish), in August 2015 there were already 46 permits for experimental transmission of digital terrestrial television in Chile⁷ and only two regions were not interested in a signal (O'Higgins and Aysén). Thus, approximately half of the national territory has been covered by a digital signal.

In spite of this, there has been no significant progress and the process of adjudication of signals has advanced slowly. In fact, in Santiago, capital of the country, the open TV signal transmitted in the ISDB-Tb digital standard is still experimental and of a demonstrative nature. According to the information of the National Television Council, the institution that grants the concessions of television in Chile after a technical analysis of Subtel, there are 851 analog concessions that should migrate to digital, of which 767 are national and 84 are regional. Forty-six experimental signals that do not have an analog concession could add to those. All of these channels must have migrated to digital by April 2020.

Another key point about digital terrestrial television is its distribution. During 2015, some progress was made in the agreements regarding Rita (Open Television Integrated Network, by its Spanish

⁶ Subtel (2015). Copa América se verá en señal HD de libre recepción en regiones. *TVD*. Retrieved on April 25, 2016 from <http://www.tvd.cl/copa-america-se-vera-en-senal-hd-de-libre-recepcion-en-regiones/>.

⁷ Espinoza, C. (2015, August 30). Ya hay 46 canales con autorización para probar la televisión digital en el país. *La Tercera*. Retrieved on April 26, 2016 from <http://www.latercera.com/noticia/tendencias/2015/08/659-645077-9-ya-hay-46-canales-con-autorizacion-para-probar-la-television-digital-en-el-pais.shtml>.

acronym), which will allow to share the infrastructure of antennas between channels wishing to be present throughout the country, and Rida (Open Television Distribution Network, by its Spanish acronym), which could use a satellite platform. It is likely that, in 2016, there are advances in the decision on how to reach the towns where there is no terrestrial antennas coverage with that signals.

Finally, although legislation recognizes Ginga middleware as an opportunity of interactivity and of adding value to open television, during 2015 there was no proposal from the Chilean TV channels or any specific action on this regard.

1.6. Information and Communication Technology (ICT) trends

The year 2015 brought the consolidation of the trends that had evolved over the previous two years: the supply of video on demand establishes itself as an alternative of access to video content for more people. The biggest exponent of this trend is Netflix, the streaming platform, which increased in almost two dollars the value of its subscription last year, even while the total of its titles fell by almost 30% in the last two years. This was due to the competition from other streaming video services (Amazon, Hulu, etc.) and the rise in the price of broadcast rights. For this reason, Netflix opted for producing its own content, as *House of Cards*, *Daredevil*, *Beast of No Nation* or *What Happened, Miss Simone?*.⁸ Nonetheless, this platform has within its offer Chilean fiction content, which has already been broadcast by national television channels.

In another field, the penetration of internet has favored other audiovisual expressions that use the service as a platform, such as webseries. It is a format little explored in Chile, but it has some initiatives that are starting to be recognized, such as *Gringolandia*, going into its third season, *Operación Toy Boy*, *APPs* and *El Mundial de Michel*.

⁸ ADN Radio (2016, March 28). ¿Por qué Netflix tiene cada vez menos películas y series? *ADN Radio*. Retrieved from <http://www.adnradio.cl/noticias/sociedad/por-que-netflix-tiene-cada-vez-menos-peliculas-y-series/20160328/nota/3094568.aspx>.

1.7. Public TV

Definitely, 2015 was not good year for TVN, the public channel. The audience crisis that had started the previous year escalated and the channel fell to the fourth place, with a rating under five points. Much of the losses that open television channels had during the first semester of 2015 correspond to the public channel, which forced it to reduce its costs by 6.3% compared to the same period of the previous year. Since the beginning of July, the channel started a process of downsizing, which ended with the separation of more than 100 workers from different areas. According to channel workers, part of the problem is inherited from the previous administration and is also due to poor programming decisions.⁹ Several members of the executive board even lowered their salaries as a sign of austerity and commitment to the station.

During the months that followed, the situation only got worse. Inside of the channel, they partly made the programming manager responsible, who not only did not lower his salary but also had taken bad programming decisions. One of them was to keep on screen a five-minute program of humor called *Colegas*, broadcast after the main newscast. This series lowered all the rating obtained by the newscast after the low audience of the *telenovela* that preceded it.

This entire crisis occurs in a context in which the government also has among its concerns creating an educational cultural channel. The new digital television law contemplates the creation of a second public television channel for cultural and educational purposes. Therefore, the economic situation of TVN was always discussed with the ghost of this new open TV signal, which could be built under a different paradigm than the current public television, i.e., funded by the State. In this scenario, any meeting of a government authority could be understood as an opportunity to discuss the situation of public television:

⁹ García Lorca, Macarena (2015, July 3). Crisis mundial de televisión abierta golpea a TVN: la estación despide a 60 trabajadores y vendrían nuevas desvinculaciones. *El Mostrador*.

I always have meetings with the president of the board of TVN. We were recently talking about the project of the educational cultural channel and, certainly, TVN as a public company, of the State, constitutes an object of attention by the Government, and particularly mine, as Minister, since I am responsible for the links with the public channel.

Those were the words of the Government spokesman, Marcelo Díaz, after a meeting in December with the president of the board of TVN, Ricardo Solari, to discuss the situation of the channel.¹⁰

1.8. Pay TV

Between 2005 and 2015, cable television has more than doubled its audience share, rising from 14% to 38%, but last year its growth slowed, increasing its share of audience in only half a percentage point. On the other hand, in terms of penetration, between December 2014 and December 2015, there was an increase of 4.7% in the number of households with access to pay TV.

Regarding the main operators, according to the information recorded by the Undersecretariat of Telecommunications, VTR is the market leader, with a share of almost 35%, followed by Movistar, with almost 22%, DirecTV, with 18%, and Claro, with 15%. However, rumors about a possible sale of DirecTV at regional level make the evolution of the composition of the offer uncertain.

1.9. Independent production companies

Historically, the independent production had a space in almost all formats of national fiction, except *telenovelas*, the icing of the cake of programming, traditionally a space that television channels reserved for their own dramatic areas. This began to change and, last

¹⁰ Cerda, Patricia (2015, December 3). Crisis en TVN: Directorio analiza millonarias pérdidas y deja pendiente presupuesto para 2016. *El Mercurio*.

year, a window seemed to consolidate for independent productions. Both in Mega and TVN the *telenovelas* broadcast in lunchtime slot have been commissioned to independent companies. In the case of Mega, the production company is AGTV, owned by Pablo Ávila, historical producer of TVN, where he worked with the current director of the dramatic area of Mega, María Eugenia Rencoret. TVN has been working with production company DDRio.

1.10. International trends

One of the barriers to the internationalization of Chilean fiction in Latin America has been the way in which national actors speak. Either because other Latin American audiences find it hard to understand them or because the accent is not pleasant to them, it represents an obstacle. Curiously, Turkish *telenovelas* could have opened an opportunity for Chilean fiction. The company DINT dubs these productions in Chile for all Latin America, and these dubbings have been accepted. According to some executives, this opens an opportunity to improve the export options of national productions if they are dubbed with the voices and style used in Turkish *telenovelas*, to which the audiences have accustomed in the region.

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

Table 1. Fiction broadcast in 2015 (national and foreign; premiere and reruns; and co-productions)

<p>PREMIERE NATIONAL TITLES – 25</p> <p>Canal 13</p> <ol style="list-style-type: none"> 1. <i>Chipe Libre</i> (telenovela) 2. <i>Príncipes de Barrio</i> (series) 3. <i>Valió la Pena</i> (telenovela) <p>CHV</p> <ol style="list-style-type: none"> 4. <i>Buscando a María</i> (telenovela) 5. <i>Lo que Callamos las Mujeres</i> (unitarios) 	<ol style="list-style-type: none"> 9. <i>Infieles</i> (unitarios) 10. <i>Maldito Corazón</i> (series) 11. <i>Series Nacionales</i> (unitarios)¹¹ 12. <i>Violeta se Fue a los Cielos</i> (miniseries) 13. <i>Adiós al Séptimo de Línea</i> (miniseries) <p>Mega</p> <ol style="list-style-type: none"> 14. <i>Casado con Hijos</i> (sitcom) 15. <i>Cobre Poder y Pasión</i> (miniseries) 16. <i>El Niño Rojo</i> (miniseries) 17. <i>La Colonia</i> (sitcom)
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¹¹ *National series* is the name with which CHV combines *unitarios* stemming from series already broadcast

<p>La Red 6. <i>Fabulosas Flores</i> (series)</p> <p>Mega 7. <i>Código Rosa</i> (series) 8. <i>Eres mi Tesoro</i> (telenovela) 9. <i>Familia Moderna</i> (sitcom) 10. <i>Papá a la Deriva</i> (telenovela) 11. <i>Pituca sin Lucas</i> (telenovela) 12. <i>Pobre Gallo</i> (telenovela)</p> <p>TVN 13. <i>Caleta del Sol</i> (telenovela) 14. <i>Colegas</i> (series) 15. <i>Esa no Soy Yo</i> (telenovela) 16. <i>Juana Brava</i> (series) 17. <i>La Chúcaro</i> (telenovela) 18. <i>La Poseída</i> (telenovela) 19. <i>Más que un Club</i> (series) 20. <i>Matriarcas</i> (telenovela) 21. <i>No abras la Puerta</i> (telenovela) 22. <i>Qué Pena tu Vida</i> (miniseries) 23. <i>Zamudio</i> (miniseries)</p> <p>UCV 24. <i>Los Años Dorados</i> (sitcom) 25. <i>Puerto Hambre</i> (series)</p> <p>NATIONAL CO-PRODUCTIONS – 3</p> <p>CHV 26. <i>El Bosque de Karadima</i> (miniseries – Chile/Argentina)</p> <p>TVN 27. <i>Dueños del Paraíso</i> (telenovela – Chile/USA Hispanic) 28. <i>Sitiados</i> (series– Chile/USA Anglo)</p> <p>PREMIERE FOREIGN TITLES – 28</p> <p>Canal 13 1. <i>Flor del Caribe</i> (telenovela – Brazil) 2. <i>Imperio</i> (telenovela – Brazil) 3. <i>Rastros de Mentiras</i> (telenovela – Brazil) 4. <i>Celia</i> (series – Colombia) 5. <i>La Única Mujer</i> (telenovela – Portugal)</p> <p>CHV 6. <i>Tierra de Reyes</i> (telenovela – USA Hispanic) 7. <i>Velvet</i> (series – Spain)</p> <p>La Red 8. <i>El Capo</i> (telenovela – Colombia)</p>	<p>TVN 18. <i>A la Chilena</i> (sitcom) 19. <i>Bim Bam Bum</i> (series) 20. <i>Brigada Escorpión</i> (series) 21. <i>Cárcel de Mujeres</i> (series) 22. <i>Cumpleaños</i> (series) 23. <i>El Día Menos Pensado</i> (docudrama) 24. <i>El Diario Secreto de una Profesional</i> (series) 25. <i>El Nuevo</i> (series) 26. <i>El Señor de la Querencia</i> (telenovela) 27. <i>Gen Mishima</i> (series) 28. <i>La Canción de tu Vida</i> (series) 29. <i>La Vida es una Lotería</i> (unitarios) 30. <i>Los Archivos del Cardenal</i> (series) 31. <i>Mea Culpa</i> (docudrama) 32. <i>Pulseras Rojas</i> (series) 33. <i>Romane</i> (telenovela) 34. <i>Sucupira, la Comedia</i> (series)</p> <p>UCV 35. <i>El Almacén</i> (sitcom) 36. <i>La Mujer del Cuadro</i> (unitarios) 37. <i>Monvoisin</i> (TV movie)</p> <p>RERUN FOREIGN TITLES – 36</p> <p>Canal 13 1. <i>Avenida Brasil</i> (telenovela – Brazil) 2. <i>El Clon</i> (telenovela – Brazil)</p> <p>CHV 3. <i>Eva Luna</i> (telenovela – USA Hispanic) 4. <i>Pablo Escobar, el Patrón del Mal</i> (series – Colombia) 5. <i>Águila Roja</i> (series – Spain) 6. <i>Hay Alguien Ahí</i> (series – Spain) 7. <i>Chespirito</i> (sitcom – Mexico) 8. <i>Corona de Lágrimas</i> (telenovela – Mexico) 9. <i>El Chapulín Colorado</i> (sitcom – Mexico) 10. <i>El Color de la Pasión</i> (telenovela – Mexico) 11. <i>La Rosa de Guadalupe</i> (series – Mexico) 12. <i>Lo que la Vida Me Robó</i> (telenovela – Mexico) 13. <i>Mujer, Casos de la Vida Real</i> (docudrama – Mexico) 14. <i>Por Ella Soy Eva</i> (telenovela – Mexico)</p> <p>Mega 15. <i>Abismo de Pasión</i> (telenovela – Mexi-</p>
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<p>9. <i>La Teacher de Inglés</i> (telenovela – Colombia)</p> <p>10. <i>Como Dice el Dicho</i> (series – Mexico)</p> <p>11. <i>La Vecina</i> (telenovela – Mexico)</p> <p>12. <i>Qué Pobres tan Ricos</i> (telenovela – Mexico)</p> <p>13. <i>Que Te Perdona Dios, Yo No</i> (telenovela – Mexico)</p> <p>14. <i>Yo no Creo en los Hombres</i> (telenovela – Mexico)</p> <p>Mega</p> <p>15. <i>El Corazón del Océano</i> (miniseries – Spain)</p> <p>16. <i>Muchacha Italiana Viene...</i> (telenovela – Mexico)</p> <p>Telecanal</p> <p>17. <i>Amo de Casa</i> (telenovela – Colombia)</p> <p>18. <i>Correo de Inocentes</i> (series – Colombia)</p> <p>19. <i>Pobres Rico</i> (telenovela – Colombia)</p> <p>20. <i>La Loba</i> (telenovela – Mexico)</p> <p>21. <i>Lo que la Gente Cuenta</i> (unitarios – Mexico)</p> <p>TVN</p> <p>22. <i>Somos Familia</i> (telenovela – Argentina)</p> <p>23. <i>Carrusel</i> (telenovela – Brazil)</p> <p>24. <i>José de Egipto</i> (telenovela – Brazil)</p> <p>25. <i>Moisés y los Diez Mandamientos</i> (telenovela – Brazil)</p> <p>26. <i>Los Hombres También Lloran</i> (telenovela – Colombia)</p> <p>27. <i>El Secreto de Puente Viejo</i> (telenovela – Spain)</p> <p>28. <i>El Tiempo entre Costuras</i> (series – Spain)</p> <p>RERUN NATIONAL TITLES – 34</p> <p>Canal 13</p> <p>1. <i>Alberto: Quién sabe Cuánto Cuesta...</i> (TV movie)</p> <p>2. <i>Héroes: Prat</i> (TV movie)</p> <p>CHV</p> <p>3. <i>12 Días que Estremecieron a Chile</i> (series)</p> <p>4. <i>Amar y Morir en Chile</i> (miniseries)</p> <p>5. <i>Cartas de Mujer</i> (unitarios)</p> <p>6. <i>Divino Tesoro</i> (series)</p> <p>7. <i>Ecos del Desierto</i> (miniseries)</p> <p>8. <i>Historias Chilenas</i> (unitarios)</p>	<p>co)</p> <p>16. <i>Al Diablo con los Guapos</i> (telenovela – Mexico)</p> <p>17. <i>Corazón Salvaje</i> (telenovela – Mexico)</p> <p>18. <i>El Chavo del Ocho</i> (sitcom – Mexico)</p> <p>19. <i>La Gata</i> (telenovela – Mexico)</p> <p>20. <i>La Malquerida</i> (telenovela – Mexico)</p> <p>21. <i>La Sombra del Pasado</i> (telenovela – Mexico)</p> <p>Telecanal</p> <p>22. <i>Los Normales</i> (series – Brazil)</p> <p>23. <i>Allá te Espero</i> (telenovela – Colombia)</p> <p>24. <i>Séptima Puerta</i> (telenovela – Colombia)</p> <p>25. <i>A cada Quien su Santo</i> (series – Mexico)</p> <p>26. <i>Chespirito</i> (sitcom – Mexico)</p> <p>27. <i>El Chapulín Colorado</i> (sitcom – Mexico)</p> <p>28. <i>La Vida es una Canción</i> (serie – Mexico)</p> <p>29. <i>Lo que Callamos las Mujeres</i> (documentary – Mexico)</p> <p>30. <i>Lo que la Gente Cuenta</i> (unitarios – Mexico)</p> <p>31. <i>Mujer, Casos de la Vida Real</i> (documentary – Mexico)</p> <p>32. <i>Se Busca un Hombre</i> (telenovela – Mexico)</p> <p>33. <i>Sonaras</i> (telenovela – Mexico)</p> <p>34. <i>Un Gancho al Corazón</i> (telenovela – Mexico)</p> <p>TVN</p> <p>35. <i>La Madrastra</i> (telenovela – Mexico)</p> <p>36. <i>Mar de Amor</i> (telenovela – Mexico)</p> <p>OBITEL CO-PRODUCTIONS – 3</p> <p>CHV</p> <p>37. <i>El Cuerpo del Deseo</i> (telenovela – USA/Colombia)</p> <p>Telecanal</p> <p>38. <i>Decisiones de Mujeres</i> (series – USA/Colombia)</p> <p>39. <i>Decisiones Extremas</i> (telenovela – USA/Colombia)</p> <p>TOTAL PREMIERE TITLES: 56 TOTAL RERUN TITLES: 132.</p>
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The total number of national premiere titles remained constant between 2014 and 2015 (28 versus 27). However, in the Ibero-American premiere imports there was a sharp decline, from 45 to 27. This contrasts with the reruns of Ibero-American titles, which went up from 18 to 39, so the total is almost the same, rising from 63 to 69. Along with this, it must be considered that, by 2015, 11 Turkish *telenovelas* were broadcast, in addition to the two pioneers, *Las Mil y Una Noches* and *¿Qué Culpa Tiene Fatmagül?*, which started in 2014 and ended in 2015.

Table 2. Premiere fiction in 2015: countries of origin

Country	Titles	%	Chapter/episodes	%	Hours	%
NATIONAL (total)	27	50.0	1.393	40.6	752:40	29.6
OBITEL COUNTRIES (total)	27	50.0	2.036	59.4	1787:05	70.4
NON OBITEL COUNTRIES (total)¹²	1	-	8	-	7:25	-
Argentina	1	1.9	128	3.7	128:50	5.1
Brazil	6	11.1	267	7.8	219:25	8.6
Chile	24	44.4	1.299	37.9	729:05	28.7
Colombia	7	13.0	374	10.9	301:15	11.9
Ecuador	0	0.0	0	0.0	0:00	0.0
Spain	3	5.6	273	8.0	338:15	13.3
USA (Hispanic production)	1	1.9	7	0.2	6:10	0.2
Mexico	8	14.8	1.003	29.3	753:40	29.7
Peru	0	0.0	0	0.0	0:00	0.0
Portugal	1	1.9	78	2.3	63:10	2.5
Uruguay	0	0.0	0	0.0	0:00	0.0
Venezuela	0	0.0	0	0.0	0:00	0.0
National co-productions	3	5.6	94	2.7	23:35	0.9
Ibero-American co-productions	0	0.0	0	0.0	0:00	0.0
TOTAL	54	100.0	3.429	100.0	2539:45	100.0

Source: Kantar Ibope Media Chile – Obitel Chile

As a reflection of what was shown in the previous table, Table 2 shows that by 2015 the proportion of Ibero-American premiere fell regarding the stable numbers from previous years: from 62% to 50%. It also diversified, increasing from five to seven countries of origin, with the entry of Argentina and Portugal. The major setback

¹² Percentages are omitted since they are included in the other totals.

is from Mexico, which drops from 26 to eight titles and from 50.7% to 29.7% in airtime.

The panorama of TV fiction consumption is complemented by the notorious presence of Turkish *telenovelas*: 11 in 2015, with a noticeable audience success and, with a little more than 900 hours, standing as the main source of *telenovelas* seen in Chile during 2015.

Table 3. Co-productions

	Titles	Co-producing countries	Production company	Format
Obitel countries	<i>El Bosque de Karadima</i>	Chile – Argentina	Ocio	Miniseries
	<i>Dueños del Paraíso</i>	Chile – USA Hispanic	TVN/Telemundo	<i>Tele-novela</i>
TOTAL TITLES CO-PRODUCED WITH OBITEL COUNTRIES: 2				
Non Obitel countries	<i>Sitiados</i>	Chile – USA Anglo	TVN/Fox	Series
TOTAL TITLES CO-PRODUCED WITH NON OBITEL COUNTRIES: 1				
TOTAL CO-PRODUCTIONS: 3				

Table 3 shows three rare cases in Chilean television – thus, interesting –, little inclined to international co-production. The first is *El Bosque de Karadima*, an extended version made for television of the homonymous film released in movie theaters. It takes a real and recent case of abuses perpetrated by a priest very influential in Chilean society. The other two, *Dueños del Paraíso* – a great failure – and *Sitiados* – with a remarkable production level – are addressed in the section “Highlights of the year”.

There are also changes in broadcasting hours, mainly because the national fiction in 2015 ceased to be concentrated at prime time and extended to the afternoons. This phenomenon is also observed, proportionally, in Ibero-American productions, but, in this case, it is exclusively due to a decrease in the prime time broadcasting, without an increase in the afternoon time slot, partly explained by the space occupied by Turkish *telenovelas*.

Table 4. Chapters/episodes and hours broadcast per time slot

Time slot	National			Ibero-American			Total		
	C/E	%	H	C/E	%	H	C/E	%	H
Morning (6:00-12:00)	1	0.1	0:15	0	0.0	0:00	1	0.0	0:15
Afternoon (12:00-20:00)	680	48.8	374:35	1.426	66.9	1297:40	2.106	59.8	1672:15
Prime time (20:00-24:00)	646	46.4	350:45	603	28.3	449:50	1.249	35.5	800:35
Night (24:00-6:00)	66	4.7	27:00	101	4.7	63:10	167	4.7	90:15
Total	1.393	100.0	752:40	2.130	100.0	1810:40	3.523	100.0	2563:20

Source: Kantar Ibope Media Chile – Obitel Chile

Table 5. Formats of national and Ibero-American fiction

Format	National				Ibero-American				
	Titles	%	C/E	%	H	%	Titles	%	H
<i>Telenovela</i>	13	48.1	989	71.0	488:40	64.9	22	81.5	1549:35
Series	8	29.6	113	8.1	66:20	8.8	3	11.1	207:20
Miniseries	3	11.1	18	1.3	12:25	1.7	1	3.7	11:00
TV movie	0	0.0	0	0.0	0:00	0.0	0	0.0	0:00
<i>Unitario</i>	1	3.7	105	7.5	87:05	11.6	1	3.7	42:45
Docudrama	0	0.0	0	0.0	0:00	0.0	0	0.0	0:00
Others	2	7.4	168	12.1	98:05	13.0	0	0.0	0:00
Total	27	100.0	1.393	100.0	752:40	100.0	27	100.0	1810:40

Source: Kantar Ibope Media Chile – Obitel Chile

As for the formats, there are differences between the national and the Ibero-American production: while in domestic production the airtime that decreases in *telenovelas* increases in series, miniseries and *unitarios*, in the Ibero-American production broadcasting time decreases in all formats, but to a lesser extent in *telenovelas*. Two factors affect this reduction: the time devoted to Turkish *telenovelas* and to reruns.

Table 6. Formats of national fiction by time slot

Format	Morning	%	Afternoon	%	Prime time	%	Night	%	Total	%
<i>Telenovela</i>	0	0.0	6	54.5	7	46.7	0	0.0	13	48.1
Series	0	0.0	3	27.3	5	33.3	0	0.0	8	29.6
Miniseries	0	0.0	0	0.0	3	20.0	0	0.0	3	11.1
TV movie	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
<i>Unitario</i>	0	0.0	1	9.1	0	0.0	0	0.0	1	3.7
Docudrama	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Others	1	100.0	1	9.1	0	0.0	0	0.0	2	7.4
Total	1	100.0	11	100.0	15	100.0	0	0.0	27	100.0

Source: Kantar Ibope Media Chile – Obitel Chile

During 2015, a movement begun in 2014 deepened. The prime time ceased to be the slot that monopolized national fiction, which is now also aired in the afternoon and went from seven to 11 titles in this period, partly due to the consolidation of lunchtime *telenovelas*. It is also noteworthy that the diversity of formats of this time slot also increased: in 2014, 71% of the titles were national *telenovelas*, while in 2015 this percentage fell, giving up time to series, *unitarios* and sitcoms. At prime time, there is an evident decline in the number of *telenovelas*, from 12 to seven, without major changes in other formats.

Table 7. Period in which fiction is set

Time	Titles	%
Present	23	85.19
Period	3	11.11
Historical	1	3.7
Others	0	0.0
Total	27	100.0

Source: Obitel Chile

Unlike the previous year, in 2015 period and historical titles are not from new seasons, but completely new fictions. One title stands out by its remarkable production: series *Sitiados*, analyzed in the section “Highlights of the year”. The other titles are *telenovela Dueños del Paraíso* (1970s), in co-production with Telemundo, *telenovela La Poseída* (late 19th century) and series *Puerto Hambre*, based on historical facts (1584). Contrasting with previous years, none of these is related to the subject of the Chilean dictatorship, an element present in many of the period and historical titles in previous years.

Table 8. The ten most watched titles: origin, rating, share

	Title	Country of original idea or script	Producer	Channel	Scriptwriter or author of original idea	Rating	Share
1	<i>Pituca sin Lucas</i>	Chile	Mega	Mega	Rodrigo Bastidas and others	24.7	41.8
2	<i>Papá a la Deriva</i>	Chile	Mega	Mega	Daniella Castagno and others	22.9	36.7
3	<i>Celia</i>	Colombia	Fox Telecolombia	Canal 13	A.Salgado, P. Rodríguez	13.2	19.6
4	<i>El Bosque de Karadima</i>	Chile	Ocio	CHV	E. Eliash, A. Scherson, Á. Díaz	13.0	18.9
5	<i>Eres mi Tesoro</i>	Chile	AGTV/ Mega	Mega	Yusef Rumie	13.0	27.9
6	<i>La Chúcará</i>	Chile	DDRio/ TVN	TVN	Julio Rojas, Valeria Hoffman	11.3	23.9

7	<i>Familia Moderna</i>	USA	Mega	Mega	C. Lloyd, S. Levitan	11.1	20.4
8	<i>Rastros de Mentiras</i>	Brazil	Globo	Canal 13	Walcyr Carrasco and others	9.2	19.1
9	<i>Chipe Libre</i>	Chile	Canal 13	Canal 13	Carla Stagno and others	9.0	13.2
10	<i>Lo que Callamos las Mujeres</i>	Mexico	Ojos Claros/ CHV	CHV	They vary	9.0	18.6
Total national productions: 8				Foreign scripts¹³: 3			
80%				30%			

Source: Kantar Ibope Media Chile – Obitel Chile

Until 2013, and since the Obitel Yearbook is published, the ten most watched fiction titles were always national. In 2014, there were only national titles in the table, but with a difference: two Turkish *telenovelas* would have occupied the first two places if Turkey belonged to Obitel. This year, for the first time, there are two Ibero-American titles – not big hits, although – in the table, and five Turkish *telenovelas* would have been in it if the origin were not restricted. The above clearly shows that the unconditional support of the Chilean audience towards national fiction ended; also, it confirms that, since 2011, there have not been fiction titles exceeding 30 rating points.

**Table 9. The ten most watched titles in 2015:
format, length, time slot**

	Title	Format	Genre	Number of chap./ep. in 2015	First and last broadcast in 2015	Time slot
1	<i>Pituca sin Lucas</i>	<i>Telenovela</i>	Romantic comedy	100	01/02/15*-25/05/15	Prime time
2	<i>Papá a la Deriva</i>	<i>Telenovela</i>	Melodrama	152	05/25/15-30/12/15	Prime time
3	<i>Celia</i>	<i>Telenovela</i>	Melodrama	24	10/21/15-29/12/15	Prime time

¹³ The script of the national production *Lo que Callamos las Mujeres* is based on the original Mexican version.

4	<i>El Bosque de Karadima</i>	Miniseries	Drama	3	09/27/15-04/10/15	Prime time
5	<i>Eres mi Tesoro</i>	<i>Telenovela</i>	Melodrama	109	07/29/15-30/12/15	Afternoon
6	<i>La Chúcaro</i>	<i>Telenovela</i>	Melodrama	264	01/01/15*-26/08/15	Afternoon
7	<i>Familia Moderna</i>	Sitcom	Comedy	7	12/03/15-27/12/15	Afternoon
8	<i>Rastros de Mentiras</i>	<i>Telenovela</i>	Melodrama	6	01/02/15*-06/01/15	Night
9	<i>Chipe Libre</i>	<i>Telenovela</i>	Melodrama	13	01/01/15*-26/01/15	Prime time
10	<i>Lo que Callamos las Mujeres</i>	<i>Unitario</i>	Drama	105	04/20/15*-17/12/15	Night

* Broadcasting started in 2015.

Source: Kantar Ibope Media Chile – Orbitel Chile

Pituca sin Lucas, with one third of its chapters aired in 2014 and the remaining two thirds in 2015, repeated its previous year first place. It can now be said that the first *telenovela* under the new administration of Mega marked the beginning of a successful new period: four of the top ten titles belong to its dramatic area, consisting of a team built on workers of the dramatic area of TVN that had emigrated the previous year.

Table 10. Themes in the ten most watched titles

	Title	Prevailing themes	Social themes
1	<i>Pituca sin Lucas</i>	Love, marital conflict, family relationships, economic insecurity.	Classism, social inequality, social conventions.
2	<i>Papá a la Deriva</i>	Love, ambition, deceit, family relationships.	Parenthood, social classes.
3	<i>Celia</i>	Love, self-improvement, effort.	Social prejudice, racism, sexism.
4	<i>El Bosque de Karadima</i>	Fear, dominance, guilt.	Sexual and power abuse.
5	<i>Eres mi Tesoro</i>	Love, infidelity, revenge, self-improvement.	Health, vulnerability, social classes.
6	<i>La Chúcaro</i>	Love, relationships, revenge, crime, deceit.	Classism, depression, rural world.
7	<i>Familia Moderna</i>	Relationships, family relationships and friendship.	Communication, parenting, homosexuality.
8	<i>Rastros de Mentiras</i>	Family relationships, revenge, ambition.	Homosexuality, health treatment, autism.

9	<i>Chipe Libre</i>	Relationships, frustration, jealousy.	Gender roles, work roles.
10	<i>Lo que Callamos las Mujeres</i>	Family relationships, relationships, jealousy, infidelity.	Sexism, discrimination, abuse, gender-based violence.

Source: Obitel Chile

Table 10 is dominated by the common theme of *telenovelas* and melodrama. Sitcom *Familia Moderna*, an adaptation of the American *Modern Family*, and, in a prominent way, miniseries *El Bosque de Karadima* – portraying a real case of abuse and domination, not with children, but with psychologically vulnerable young people – deviate from these subjects.

Table 11. Audience profile of the ten most watched titles: gender, age, socioeconomic status

Title		Channel	Gender %		Socioeconomic status %			
			Women	Men	ABC1	C2	C3	D
1	<i>Pituca sin Lucas</i>	Mega	65.9	34.1	7.4	19.2	31.6	41.8
2	<i>Papá a la Deriva</i>	Mega	70.5	29.5	6.8	17.6	30.7	45.0
3	<i>Celia</i>	Canal 13	61.1	38.9	12.4	21.3	30.6	35.8
4	<i>El Bosque de Karadima</i>	CHV	62.0	38.0	11.6	26.0	33.3	29.1
5	<i>Eres mi Tesoro</i>	Mega	74.3	25.7	4.6	15.5	25.3	54.6
6	<i>La Chúcaro</i>	TVN	71.3	28.7	4.5	11.1	30.0	54.3
7	<i>Familia Moderna</i>	Mega	71.3	28.7	3.3	15.2	26.4	55.1
8	<i>Rastros de Mentiras</i>	Canal 13	77.2	22.8	9.8	29.2	29.4	31.6
9	<i>Chipe Libre</i>	Canal 13	56.5	43.5	12.3	21.3	35.2	31.3
10	<i>Lo que Callamos las Mujeres</i>	CHV	70.5	29.5	4.6	15.1	26.8	53.6
Titles		Age group %						
		04-12	13-17	18-24	25-34	35-49	50-64	65-+
1	<i>Pituca sin Lucas</i>	9.7	9.1	8.4	13.0	24.4	19.6	15.7
2	<i>Papá a la Deriva</i>	11.4	8.0	8.9	15.6	20.8	17.4	17.9
3	<i>Celia</i>	5.5	4.4	9.4	14.8	23.0	23.0	19.9
4	<i>El Bosque de Karadima</i>	3.1	4.5	8.8	11.8	27.0	24.4	20.4

5	<i>Eres mi Tesoro</i>	8.9	4.9	9.5	16.9	20.3	17.6	22.0
6	<i>La Chúcará</i>	6.4	5.1	6.3	10.8	17.1	22.3	31.9
7	<i>Familia Moderna</i>	7.1	5.3	8.0	16.8	23.8	19.1	19.8
8	<i>Rastros de Mentiras</i>	11.3	2.3	8.1	19.5	21.0	22.5	15.2
9	<i>Chipe Libre</i>	12.8	4.7	13.0	24.3	24.1	10.8	10.3
10	<i>Lo que Callamos las Mujeres</i>	5.1	5.4	7.0	12.8	21.8	23.8	24.0

Source: Kantar Ibope Media Chile

Although none of the titles in Table 11 individually shows an anomalous audience profile, seen as a whole and compared with 2014, there is a shift toward female audience (+2.2%) and viewers that are less than 35 years old (+4.7%).

3. Transmedia reception

During 2015, the transmedia production of Chilean television fiction did not progress. Of the 27 new Chilean fiction productions, the ones with Facebook fan pages were those corresponding to the main fiction of each channel. The rest did not have a transmedia content strategy or continuity through other content channels, as it happened in previous years, when the *telenovela* ‘experience’ was complemented with the participation of its protagonists in other non-TV platforms.

In any case, the use of Facebook as a showcase and space of interaction of the *telenovela* or series with its audience presented some variants. The simplest case is the generation of fan pages, with a header of images related to the program and postings of the production that include a photo and a text inviting to watch the program, through questions that appeal to curiosity regarding what will happen in the next chapter.

A second use of Facebook includes the integration with Twitter, using a hashtag that includes the name of the program to be used in that platform. At the end of 2015, there was an evolution of this practice, by including special hashtags alluding to the *telenovela*

in order to inspire the audience's participation. Some examples are #GranFinalPapáALaDeriva, in the case of *telenovela Papá a la Deriva*, and phrases that summarize or give a scoop of the contents of the chapter, such as #LaConquistaDeAndrea, alluding to one of its characters.

In general, the strategy links social network platforms, primarily Facebook and Twitter, and the website of the *telenovela* or series. There are postings made to and from each social network. Sometimes, the video is hosted on the website of the program, although most of the times it is posted on Facebook.

Finally, there is a cross-promotion of programs: at the end of a *telenovela*, its characters present the *telenovela* that follows. For example, at the end of *Matriarcas*, the protagonist appeared in a picture on Facebook announcing the *telenovela* that would be aired soon, *Moisés*, using the hashtag #YoSigoaMoises.

4. Highlights of the year

The year 2015 was contradictory to Chilean fiction on television. On the one hand, the fall of the public channel, TVN – once unchallenged leader of the fiction area –, deepened. Mega, however, which under its new administration was the first to bring Turkish *telenovelas* to Latin America, pledged to have Chilean *telenovelas* aired daily¹⁴; not only it met the goal but also conquered the audiences. Finally, it is paradoxical that the channel whose fiction is in crisis is precisely the one that broadcast *Sitiados*, a high-standard product, which we have chosen as the more prominent product of fiction in 2015. *Sitiados* is an eight-part miniseries developed in co-production between independent production company Promocine, Fox international Channels and TVN, with the support of the National Television Council. Its quality led it to be applauded by crit-

¹⁴ Bethia group, also owner of Radio Candela and the children pay channel Etc. TV, acquired Mega in December 2011. Bethia is also part of the controllers of Falabella holding, with presence in Argentina, Brazil, Chile, Colombia, Peru and Uruguay in newsstands, department stores and supermarkets.

ics and to achieve a high rating in Chile, although not enough to be among the top ten of the year. It also attained a high performance on America's pay TV in Spanish and international sales.

The year 2015 started with the sinking of the dramatic area of TVN, due to the failure of two fictions: *Caleta del Sol* and *Dueños del Paraíso*. The 8 p.m. *telenovela* *Caleta del Sol* – an original idea of Carlos Oporto, starring Carolina Arregui, Francisco Melo and Gonzalo Vivanco, and directed by Alex Bowen – underwent a tortuous path. It premiered on October 20th, 2014 and was planned to conclude in late April 2015. However, it experienced a setback before its first month on air. After its poor audience results, it was changed to the afternoon time slot, at 5 p.m. It should be noted that the earlier *telenovela* of TVN *El Amor lo Manejo Yo* led its time slot with an average of 18 points, while *Caleta del Sol* had the sad record of the worst rating in the history of national *telenovelas*, only 3.9 points average. Finally, the *telenovela* was shortened and prematurely ended on Wednesday, January 21st, 2015.

Dueños del Paraíso is a *telenovela* created by Telemundo Studios (a Universal Comcast company) in co-production with TVN, written by Chilean Pablo Illanes, with locations in Miami, the United States, and Santiago, Chile. It was set in the 70s and starred by Mexicans Kate del Castillo and José María Torre and Chilean heartthrob Jorge Zabaleta. *Dueños del Paraíso* was aired in mid-January 2015, almost simultaneously in both co-producer countries, with very different results. While in the United States it became one of the biggest hits in the history of Telemundo Networks, in Chile it was an absolute failure: the first chapter averaged 8.1 points and, within weeks of its release, the situation worsened, reaching only 4.1. The decision made by TVN executives of making a co-production in which a territory absolutely controls the editorial line of the *telenovela* was a shallow, and the audience did not forgive it.

A crucial fact in the fierce fall of the public channel was that, by the end of 2013, the director of the dramatic area of TVN, María Eugenia Rencoret, resigned from the channel where she started her

career.¹⁵ The problem originated in the renewal of her contract, since she was part of the political struggle between the channel's president of the board, Mikel Uriarte – appointed by then president Sebastián Piñera – and the executive director of the channel, Mauro Valdés. The latter offered to renew her contract for only five months, waiting for the change of president of the board with the arrival of a new government in 2014. The director of the dramatic area considered this offer humiliating, since a few days before the executive director had committed to renew her and her team contract for several years.

It is said that Bill Gates once stated that, if 20 specific people left Microsoft, the company would risk bankruptcy. Rencoret did not leave alone: Mega hired her, and more than 50 key professionals of the dramatic area of TVN went with her to create an area such as the one she left.

Thus, the success of Mega goes far beyond Turkish *telenovelas*. *Las Mil y Una Noches*, a Turkish production, ended at the beginning of 2015. After more than ten months in the air, the first Turkish *telenovela* brought to the country by Mega installed a television phenomenon: it had an average rating of 28.2 points. Many Chilean television executives believed that the success of Mega with *Las Mil y Una Noches* would be temporary. However, Turkish productions have been a series of hits; they followed with *¿Qué Culpa Tiene Fatmagül?*, with 27.5 points average. Even though Mega used this *telenovela* under a flexible programming tactic to support its own production, *Fatmagül* was a noble product, since it resisted several schedule changes to support new productions of Mega. The good results followed with *Ezel*, *Sıla* and *Kara Para Aşk*.

It is noteworthy that the executive director of Mega, Patricio Hernández, promised to the director of the dramatic area, María Eugenia Rencoret, that the channel would daily air national *telenovelas*. This promise was gradually fulfilled: Mega premiered on October 13th, 2014 *telenovela Pituca sin Lucas* and, after 153 chapters,

¹⁵ Between 2005 and 2015, the annual average rating of TVN fell from 8.8% to 4.3%.

on May 25th, 2015, ended with a rating average of 25.2 points. It widely defeated its competition from Canal 13, *Valió la Pena*, which had 4.9 points, and *Caleta del Sol*, of TVN, with 3.9 points.

Mega continued making *telenovelas* and built its own studios so it would not have to depend on the facilities of producer Chilefilms. *Pituca sin Lucas* was followed by *Papá a la Deriva*, an original idea of Daniella Castagno under the general supervision of María Eugenia Rencoret, starring Gonzalo Valenzuela and María Gracia Omega. It premiered on May 25th, 2015 and ended in early 2016, with an average rating of 23 points.

Mega executives decided to outsource their first 3 p.m. production, so they hired AGTV – a production company owned by Pablo Ávila, former executive of TVN – for the project *Eres mi Tesoro*. It premiered on July 29th, 2015 and its last broadcast was on April 6th, 2016, with an average rating of 14.2, a very good result for that time slot. *Eres mi Tesoro* was based on an original story of Yusef Rumie, with scripts by Luis Ponce and Francisco Bobadilla, supervised by María Eugenia Rencoret. María José Bello, Álvaro Morales and Felipe Contreras starred it.

These productions show that Mega has been able to capitalize on the audience's attention captured by Turkish *telenovelas* to form a production area of their own, successful until now, which continues to invest in new talent.

Although the success in audiences in fiction shifted from TVN to Mega, the public channel, in an international co-production, made the most remarkable individual title of the year, with a high production level. *Sitiados, la Otra Cara de la Conquista* is a series of eight 60-minute episodes. It is a historical drama, based on an original idea by Carmen Gloria López, directed by Nicolás Acuña and written by Wilfredo Van Broock, Luis Emilio Guzmán and Paula del Fierro, supervised by Jorge Stamadianos.

The project took long time to be developed, since the Chilean market could not finance a proposal of this magnitude. The dramatic action is set in the time of the conquest of the mapuches by

the Spaniards, specifically in the siege of Villarrica, occurred between 1598 and 1601 in the current region of La Araucanía. The project won the fund to support quality productions of the Chilean National Television Council (CNTV). Production company Promocine, owned by director Nicolás Acuña, presented the project and teaser in 2011 to CNTV. However, the project was not elected and they presented it again twice. In the last nomination, when presented as a co-production, it managed to win the CNTV fund.

The story is about 500 Spaniards who were prisoners in a village that they had founded in mapuche territory. Only 22 survived. The series narrates a love story, while fiction reflects the experience of abandonment and defeat of the Spaniards against the mapuche people defending their territory.

According to Rony Goldschmied, executive producer of TVN, *Sitiados* was not winning the competitive funds “because it was an expensive project”. Finally, CNTV gave away approximately US\$ 600,000 for its filming. The project also had some support of TVN, which contributed with approximately US\$ 230,000. However, the decisive contribution was made by Fox International Channels – about US\$ 2,200,000 –, in a bet pushed especially by its executives Edgar Spielmann and Richard Rohrbach.¹⁶

On December 18th, 2013, TVN signed an agreement of co-production with Promocine and Fox International Channels to record the first premium historical series in Chile, to be broadcasted thanks to Fox in all Latin America.

The series was filmed in Villarrica, about 700 kilometers south of Santiago, in the film studios of Los Cerrillos in Santiago and in Curacaví, near the capital. It starred Chilean actors – Benjamín Vicuña, Francisco Melo, Luis Dubó and Julio Milostich, among others – and foreigners, such as Marimar Vega (Mexico), Macarena Achaga (Argentina) and Andrés Parra (Colombia).

¹⁶ Figures provided by Eduardo Mito Alegría, production manager at TVN

In May 2015, Fox made a preview of the series through its streaming platform Fox Play, obtaining good results in markets such as Argentina, Mexico and Colombia, as stated by Edgar Spielmann, executive vice-president and chief operating officer of Fox International Channels Latin America. The series premiered on pay channel Fox+10 in May 2015 and was then broadcast by TVN from July 2nd of the same year.

On TVN, *Sitiados* had 11.7 rating points in its debut and averaged 8 points during its broadcast at prime time (on Sundays, at 10:30 p.m.), which was a good rating considering the bad outcomes of the public channel.

Sitiados is a high quality product that has been exported worldwide thanks to Fox international sales division. It is a transcendent series in the history of Chilean TV: not only it is a super dramatic production of a non-common standard but also presents the tough history of the conquest of Chilean mapuches by the Spaniards, a subject still not sufficiently addressed.

5. Theme of the year: (re)invention of TV fiction genres and formats

The Chilean telenovela, with its late industrialization process¹⁷, has some features that have been reasonably stable over time: a wide range of secondary characters, with broad social references, and the appropriation of plausible resources alien to melodrama, such as comedy and mystery (Fuenzalida, Corro and Mujica, 2009; Gavilán, 2016).

From the 1990s, both Canal 13 and TVN, the two channels producing fiction at the time, consolidated a scheme of production of *telenovelas*. Recording outdoors was increasingly important and a new “visual grammar” (Santa Cruz, 2003) began to manifest with diversity of settings, greater care in photography, more action

¹⁷ April 2016 marked 35 years of the broadcasting of *La Madrastra*, the *telenovela* whose success allowed to found the industry of *telenovelas* in Chile (Gavilán, 2016).

sequences. The characters ceased to be moral archetypes, such as those in *telenovelas* of the previous decade, and became social types that identify a class, a region, an age group. The *telenovela* plays with different narrative series, in which several parallel stories occur and various genres are mixed (comedy, police, comics, video clip, advertising and others).

While some of these traits would link it to the post-modern or neo-Baroque moment, Chilean *telenovela* has not reached the distance with traditional melodrama, since the productions that have ventured outside the traditional framework have not had great audience results.

Mystery and suspense is the great hallmark of *telenovelas* since the 1980s (with landmarks such as *La Madrastra* (1981) and *Los Títeres* (1987)), in which this type of frameworks allowed to suggest the feeling of oppression and injustice of a dictatorial context (Gavilán, 2016). This type of stories became the main concept of successful *telenovelas* of the first decade of 2000, almost all of TVN. The chance of showing violence that is more explicit in the nighttime allowed to make a turn toward mystery plots. The crime that founds the history did not occur in the past, it is not suggested or told by the characters, it takes place today and is shown in bloody detail in projects as *Alguien te Mira* (2007) or *El Señor de la Querencia* (2008). Some of these scripts were sold abroad, converting Chilean writers and these formats in a unique product.

Melodrama outside of *telenovelas*: one of the biggest changes of recent years, witnessed by the teams of Obitel Chile (2012) and Peru (2014 and 2015), is the extension of the melodramatic representation outside the fictional sphere. In other words, it is possible to detect features of melodrama understood as a type of fictional story (Fuenzalida, Corro and Mujica, 2009) in works that do not belong to the traditional definition of the genre.

They do if we understand the genres as discursive practices, as Mittell (2001), in which the regularity of features defines the boundaries of the genre. Some features appear frequently enough

to be part of a common definition, despite the constant negotiation to which the same genre concept is subject. An analysis of this type will allow simultaneously defining and characterizing melodrama as a genre, and make an inventory of what we call melodramatic. The appearance of any of them in a particular work does not allow binding definitions, but indicates the use of tools that appeal to a particular generic ethos, recognizable by the spectator.

In Chile, as in Peru (Obitel Yearbooks 2014 and 2015), reality shows (formats such as *Protagonistas de la Fama* or *Mundos Opuestos*) and youth programs (such as *Calle 7* or *Mekano*) were the manifestation of that change. Participants tell in detail their romances, the viewer is witness to intense scenes of love and hatred, of the struggle against infidelity, etc. The position of these programs in programming, either preceding or replacing evening *telenovelas*, suggests a continuity of the melodramatic imagination (Herlinghaus, 2002) on screen.

In recent years, we have also studied the appearance of this kind of melodramatic treatment in Chilean newscasts (Mujica and Bachmann, 2015). In a context of constant criticism towards sensationalist coverage, with little relevance, focused on emotional testimonies and stories of “common” people, it is possible to link the news treatment with two types of melodramatic attributes: customization – the informational focus is on the private/personal/concrete over the public/social/abstract – and information on emotions and their exacerbation through rhetorical resources.

Multiplatform explorations: the Obitel Yearbook 2011 looked into multiplatform explorations on Chilean television. Then, we spoke of the existence of transmedia viewing – the chance to watch chapters or programs on the website of the channel or on YouTube – with limited space for interactivity, mainly comments on the official website, Twitter and Facebook.

We also detailed some multiplatform adventures. Canal 13 explored the genre of interactive *telenovelas* with *Quiero si Tú Quieres* (2004 and 2005) and *El Blog de la Feña* (2008 and 2009). In them,

the public voted about the development of the story by phone or internet. The decisions about the characters or the course of the *telenovela* depended on the outcome of those votes.

From 2010, with the *telenovela La Casa de al Lado*, TVN generated specific content for various platforms: webseries and web-comics on its website, blogs, Facebook profiles for the characters and contests to promote creative interaction – the audience sends its own videos of a choreography presented in the *telenovela*.

The cessation of innovation: 2015 was a complicated year for Chilean television industry. The channel's economic crisis had a chilling effect on innovation in all areas: genres, formats, distribution and interaction patterns.

The success of Mega built in 2014 through the broadcasting of Turkish *telenovelas*, which was an innovation with impact across the continent (Obitel 2015), revitalized the screen with stories of great melodramatic power, male characters that had to redeem themselves of acts of violence committed against the female protagonist, high production levels and high ratings. Chile became a distribution platform for Latin America, where “the Turks” also had an immediate success. The audience levels of these *telenovelas* have stabilized in the past year and no longer monopolize the prime time of all channels. At this time, only Mega and Canal 13 had a Turkish production after 10 p.m. and, in the case of the latter, there is no clarity of what product will replace it once it ends.

Another innovation of the Turks was the opening to new markets for fiction. Canal 13 broadcast with moderate results a Portuguese *telenovela* and TVN, in the midst of a major economic crisis, announced the transmission of a Greek one.

With so many changes, why saying there is a cessation of innovation? The consolidation of Mega has been through the construction of its own dramatic area, which has produced *telenovelas* for daytime (aired at 2 p.m.), for the evening (at 8 p.m.) and that prepares one for nighttime. So far, these projects have responded to traditional models of the genre – high levels of melodrama, stereo-

typed characters – giving centrality to family comedy. The hallmark of Mega daytime *telenovelas* has been a high melodramatic load – love at first sight, abandoned children, socio-economic differences – in stories that refer to relevant social problems – child disability, physical rehabilitation and transplantation of organs. In the evening, the most successful *telenovelas* add to easy comedy the staging of national news issues in burlesque ways. For example, the student marches or the public health system in *Pituca sin Lucas* (2015).

As stated before, TVN has virtually frozen its dramatic area: its last evening *telenovela*, *Matriarcas* (2015), tried to resort to a family comedy model, without any success. Canal 13, on the other hand, has migrated toward *telenovelas* aimed at young adults, trying to replicate the success of *Soltera Otra Vez*. It essentially puts in scene couples conflicts, relationship with the children and work.

Programming strategies have changed, although. In the last year, the phenomenon of flexible programming has exacerbated. Programs have no fixed duration, sometimes lasting more than one hour, others half hour and others airing 20 minutes from the previous chapter, 15 from the current and ten of the following's preview. They also do not have a fixed day of broadcasting: they can be premiered on a Sunday, then change to 8 p.m. Monday to Friday, then decide to air it at 8 p.m., but on Monday, Wednesday and Thursday. These decisions are made considering the levels of audience of the programs that precede them, the performance of the competition in a specific day or time slot and the audience of the program. This has resulted in complaints from the audience through Facebook channels and internet websites, but that is how the industry is gathering viewers: they know that faithful viewers will follow them any time slot and day, and try to capture the others.

Multiplatform exploration, at least in 2015, practically stopped. Nowadays, on the websites of *telenovelas* and other programs of Canal 13, TVN and Mega there are, basically, static information, references to Facebook, links to previous chapters and references to related events (e.g., actors' interviews). Facebook is used to make

announcements about what is to come and to highlight the decisive moments of that day's chapter. Mega adds polls, which do not have effects in the story.

Mega has announced on its website its intention of pioneering in multiplatform technology through the creation of responsive content for smartphones and tablets. The executive director of the channel, Patricio Hernández, described a four-year plan so that Mega will become the first digital media in Chile, generating exportable content, distributed by "several pipelines", each one appropriate to the conditions of consumption. He announced the creation of over-the-top (OTT) content so that all fiction files are available and the audience can generate its own menu. He also spoke of making a Mega application, which will also feature exclusive content (De la Fuente, 2015).

The other channels have not made any announcement accordingly. Excluding the relationship between TVN and Fox Play for the production and distribution of the series *Sitiados*, there have not been actions in this regard during 2015.

Thus, it is possible to deduce that the content stagnation is linked to changes in the behavior of the industry. In a context of precariousness of three of the four national channels, it is not strange that they resort to proven success formulas and to the imitation of leading products. What is possible is that, once they have stabilized, there are new attempts to find creative solutions.

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COLOMBIA: BETWEEN CHANGE AND INNOVATION IN GENRES AND FORMATS

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1. Colombia's audiovisual context in 2015¹

In Colombia, the year 2015 had several key events that marked the nation and made resonance in media production and in the television consumption habits. This was the case of the peace process with the FARC, which had, in September, an important announcement on the part of the president referring to the final signing of an agreement, by March 2016, and that caught the attention and expectation across the country. Similarly, the sports scene was very important, especially soccer and cycling. Also, the evening of election and coronation of Miss Universe was an event whose impact was also undeniable on media. Finally, the growth and dissemination of streaming services, VoD and over-the-top (OTT) content services were definitive in the variation and innovation in genres and formats, as well as in the audiences' preferences and trends.

In this context, 2015 appears to be a year in which television consumption was inclined towards sports and entertainment pro-

¹ For the development of this academic research, we had the significant contribution of Ibope Colombia, company that kindly provided us with data and statistics on which this study is based.

gramming, as well as the newscasts and opinion. Thus, the most watched programs were just transmissions of one of the qualifying soccer matches for the 2018 Fifa World Cup Russia and the ceremony of Miss Universe, as well as news in their broadcasts at noon and prime time and programs related to investigation, as *Bajo la Mira* and *El Rastro*. It is also worth noting the launching and positioning of systems such as ClaroVideo and MovistarVideo, which, in conjunction with the growth of subscriptions to Netflix and to VoD systems of private channels and international cable signals, such as HBO GO, Fox Play and ESPN Play, among others, have created an extremely complex situation both in terms of content circulating on screen and in the legislation, so that even the topic of Netflix has been featured in Congress and in the National Television Authority (ANTV, in Spanish).

In the case of fiction, it is worth noting that RCN has again become the channel with larger audience ratings, as in previous years, positioning two of its productions in the top spots among the most watched titles of the year and sharing positions with Caracol Televisión, so that each of these channels has five fictions located among the top ten. Also, it is worth noting that, despite the almost complete domination of the series format in the television programming, the most watched fiction was a *telenovela* (in fact, the only one in the top ten), though its format and genre present significant variations that stand out with innovations that have emerged on production and television narrative structuring and that refer to a very strong identification process management, multiplicity and a latent film language.

Thus in terms of genres and formats, television fiction in Colombia during 2015 has offered an interesting process of transformation and modification of both the technical realization and the conception of narratives on screen. Essential features of this process of change and innovation are evident in phenomena such as: the preponderance of series format and the gray area created for the *telenovela*; the predominance of biographical format in the narra-

tive as a legacy of biopic; the handling of technology, equipment and narrative arcs of cinema in the audiovisual production; the use of digital and mobile platforms – like Caracol Play, RCN Televisión and RTVC – and the exploration by public channels and small producers of new techniques and possibilities in cases like *Paciente* (transmedia production to be launched in 2016); the production of webseries; and the co-production of content with international channels or systems like Netflix.

1.1. Open TV in Colombia in 2015

Open television in Colombia is composed of five national channels, distributed as follows:

Chart 1. National open TV stations/channels in Colombia

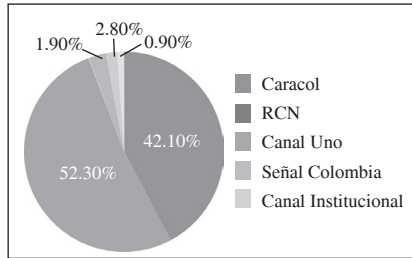
PRIVATE STATIONS (3)	PUBLIC STATIONS (2)
RCN	Señal Colombia
Caracol	Canal Institucional
Canal Uno	
TOTAL TV STATIONS = 5	

Source: Obitel Colombia

Regarding composition and distribution, private channels Caracol and RCN remain as protagonists and, as in previous years, they maintain the highest rate of national audience, besides the wide range of content offer and a considerable advantage in production resources compared to other private and public channels, which, despite an interesting bet on the quality of its productions, as is the case of Señal Colombia, and the use of platforms by Canal Institucional, are still within a low margin of attention and consumption by audiences.

Graph 1. TV audience by channel

Total TV sets on – Special (TLE)*	Individual audience	%
Caracol	3.33	52.30
RCN	2.72	42.1
Canal Uno	0.17	2.8
Señal Colombia	0.10	1.9
Canal Institucional	0.05	0.9
TOTAL	6.37	100

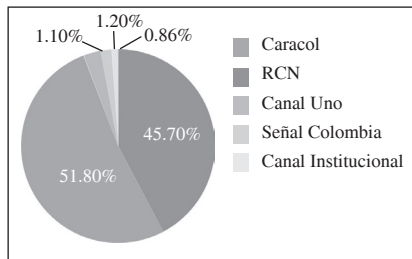


Source: Ibope Colombia – Obitel Colombia

Graph 1 shows the preponderance of two private channels, RCN and Caracol, which have 95% of the audience, and the constant results of the other three stations, which keep the same margin of the previous year. It is worth highlighting that RCN has managed to increase its audience, although Caracol remains as the national leader.

Graph 2. Share by channel

Total TV sets on – Special (TLE)	Individual share	%
Caracol	23.90	51.80
RCN	19.52	45.70
Canal Uno	1.19	1.20
Señal Colombia	1.12	1.10
Canal Institucional	0.40	0.20
TOTAL	46.13	100

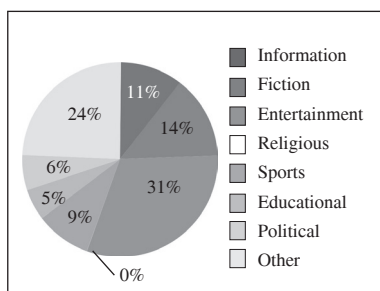


Source: Ibope Colombia – Obitel Colombia

In the case of share, the private channels are the ones with the highest figures, as they amount to 97.5% of share, and Caracol is again the channel that dominates television in 2015.

Graph 3. Offer by genre in TV programming

Genres broadcast	Hours broadcast	%
Information	4050:16	10.5
Fiction	5558:60	14.3
Entertainment	11970:55	30.7
Religious	89:06	0.2
Sports	3558:06	9.1
Educational	1930:23	5.1
Political	2378:54	6.1
Others	9364:90	24.1
Total	38900:19	100



Source: Ibope Colombia – Orbitel Colombia

As for the TV programming offer in Colombia, the entertainment continues to occupy a prominent place at the level of demand during the year, with 30.7%, followed by other genres, including magazines and productions in which politics or sports discussion is intertwined with some journalistic elements, within that hybridization so characteristic of the genres today. Fiction ranks third, with 14.3%, and its preponderance at prime time is vital, sharing this slot with entertainment and news. Finally, sports programs still have great relevance, with 9.1%, largely due to the World Russia 2018 qualifying matches and Copa America celebration.

1.2. Audience trends in 2015

Sports and entertainment concentrated most attention of the audience in 2015, with special highlight for the events with national participation and great expectations for the performance of compatriots collectively (as in the case of the Colombian soccer team) and individually (Miss Universe). In addition, new reality shows appeared, becoming the major sources of television consumption and the prime time players along with fictions. Finally, information and, particularly, opinion and journalistic research programs turned into spaces of consumption by the audience, largely due to political processes experienced by the nation.

In the digital scenario, the networks play an essential role in the communication ecosystems of the nation, being an important area not only for the exchange of information but also for political debate, as with Twitter, or for critical use of language, such as the construction of memes on Facebook, and even informative parody phenomena, such as Actualidad Panamericana news portal, dedicated to making fun of the national reality through news language humorously. The television, likewise, has begun to imbibe tools and applications to take up the challenge of digitization, and the portals have begun to be renewed with the intention to reach these new audiences arising from the web scenarios and whose habits are marked by the premise of seeing products anytime, anywhere.

Finally, with regard to fiction, the importance of series production, with the exploration of its versatility, was consolidated, although some elements of *telenovelas* classic melodrama are still included, generating a significant hybridization in this type of fiction in the country. Similarly, the concern and dedication in production processes at the technical level are aspects on which public and private channels have placed special emphasis at the moment of designing and broadcasting their contents.

1.3. Advertising investment of the year: in TV and in fiction?

Regarding advertising investment, the year 2015 was marked by a drop in different media, which can be explained by the complex political climate given the context of the peace talks and the devaluation of the peso against the dollar, with the consequent economic cost. However, mass events, like Copa America, revitalized the investment and allowed to keep a percentage in which the importance of the advertising is remarkable comparing with other media. Additionally, in the case of fiction, prime time is again retaining the most important place.

² Data used in this section were provided by Asomédios and Ibope Colombia. Advertisement investment in media 2015 and Investment in television 2015, respectively.

In this extent, national television leads the advertising investment over other media, with 51%, followed by local and regional television, magazines – which continue with a high decline in investment, materialized in 7.7% in 2015 – and, finally, the radio, which was the unique that presented a growth of investments, 1.6%. In all cases, one of the additional reasons for understanding the reduction of advertising has to do with the increasingly importance of the internet and smartphones in the households, becoming an epicenter for information and entertainment consumption.

About investment in television specifically, it is worth noting the income of the two main private channels: Caracol recorded total investments of 1,861 billion pesos and RCN, 1,876 billion pesos. In the case of fiction, for Caracol, the income amounted to 566 million and, for RCN, 848 million, including series and *telenovelas*. It is important to note the increased investment in prime time, which represents more than 50% of that investment. Thus, fiction remains as one of the largest advertising spaces, along with sports, news and entertainment, which were quite important formats during 2015.

1.4. Merchandising and social merchandising

Regarding merchandising, we must highlight how the different chains, both public and private, have begun to make use of networks as a mean of positioning its image and its productions, both in the case of fiction and sports broadcasts and other television products. Thus, platforms and mobile applications have started to play a prominent role and VoD and streaming systems have become a key to focus on audience and establish new spaces for marketing and positioning of their brands. Additionally, the strategy of organizing mass events with participation of actors, reporters and television production figures is maintained; so, the positioning level is taking place not only online but also offline.

As for the social merchandising, fiction counts with the participation of production houses and series and *telenovelas* with their

cast and team in events like Walk of Solidarity for Colombia and Teleton, which continue to take place annually.

1.5. Communication policies

In the aspect of communication policies, in 2015, the discussion concerned the definitive expansion of mobile 4G, the implementation of greater DTT coverage, the development of Vive Digital Plan and the heated debate due to the presence of new players, like Netflix, in the transmission of content. There are several aspects that appear as a constant and marked the importance of digitization spaces as part of the social life of the nation and, additionally, as decisive actors in consolidating consumer trends in Colombia.

1.6. Information and Communication Technology (ICT) trends

The country has gradually created the conditions to develop a significant expansion of digitization and use of internet and the many services that the web offers, including VoD, OTT and streaming systems, which are increasingly used by the various national media. In this sense, the nation reached in mid-2015 a total of more than 50 million users of mobile technology and an increasingly strong presence of public Wi-Fi systems in different shopping centers and transport systems, as Transmilenio. Hence, in Colombia, ICTs are marked by a significant growth trend and presence in all scenarios of daily life through the use of multiple screens and internet as a fundamental and irreplaceable resource.

1.7. Public TV

In 2015, major initiatives were undertaken to achieve a better positioning of public television in Colombia, ranging from the investment in content and technologies until the hiring of satellite capacity to broadcast in high definition. There were also ministerial campaigns, such as *Pásate a la Pública*, promoting improvement in infrastructure issues and encouraging the development of local and global well-developed narratives, and, as the case of *Catfish*

Colombia (whose production is supported by regional channel Telecafé for MTV Latinoamerica), they also enable the public sphere to make greater presence in homes. However, audiences on a massive scale still prefer private national channels and, although the regional channels have seen an upturn in consumption, they are still far from being part of Colombians' preferences, and this is the biggest challenge.

1.8. Pay TV

Pay television has continued with an exponential growth during 2015, so it holds 48% of the television audience and manages to reach 86.8% of the population. Thus, the productions of major channels have become an important focus of attention, as well as international series such as *The Walking Dead* and *Game of Thrones*, which have occupied some pages of the national press as a media phenomenon. However, despite its strong growth, there is a latent concern of operators with systems like Netflix regarding the channels' OTT, besides the taxes and economic implications associated with these new actors in the dissemination of audiovisual content.

1.9. Independent producers

Independent production has been greatly strengthened by the presence of internet and the opportunities to produce content offered in this sector. In addition, the emphasis on quality and the desire for growth and fulfillment of increasingly ambitious projects have led the sector to grow and become an interesting alternative production space. Thus, an important production niche was developed through products such as webseries, commercials, video clips and, in the most highlighted cases, the participation in larger productions for international channels or digital platforms.

1.10. International trends

Regarding the media contemporary landscape, there is a significant impact of trends that have become fundamental in contem-

porary communicative ecosystems, related, in the case of television, to its transformation in the light of the digitization and new trends and habits driven by the digital scenario and the consumption freedom. That is why, as happens on a global level, the small screen has started to move towards the multi-stage and the audience is beginning to take control of consumption through digital applications.

Synthesis

The year 2015, marked in social level by the peace process and the importance of sports participation in Colombia, offered an interesting transition process in the audiovisual context to a mobile and multiscreen scenario, which is tuned to global trends of digitization. To this extent, we must highlight the extensive growth of pay TV, the development of VoD system on national channels and the expansion of streaming and OTT systems, which represent fundamental changes in the audience, heading to an undeniable digital paradigm. In parallel to this, significant efforts were made to strengthen the public TV, although consumption is still led by private TV. Finally, with the expansion of the digital horizon, the independent producers gained strength and, at the political level, there has been considerable debate about the role of offers like Netflix and its relation with the payment of taxes as well as about the competition with cable operators.

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

Table 1. Fiction broadcast in 2015 (national and foreign; premieres and reruns; and co-productions)

PREMIERE NATIONAL TITLES – 11	RERUN TITLES – 27
<p>Caracol – 4 titles</p> <ol style="list-style-type: none"> 1. <i>Las Hermanitas Calle</i> (series) 2. <i>Laura, la Santa Colombiana</i> (series) 3. <i>Dulce Amor</i> (series) 4. <i>Esmeraldas</i> (series) 	<p>Caracol – 8 titles</p> <ol style="list-style-type: none"> 1. <i>En Otra Piel</i> (telenovela) 2. <i>Victoria</i> (telenovela) 3. <i>La Ronca de Oro</i> (telenovela) 4. <i>Rafael Orozco, el Ídolo</i> (telenovela) 5. <i>La Viuda Negra</i> (telenovela)

<p>RCN – 6 titles</p> <p>5. <i>Diomedes, el Cacique de la Junta</i> (telenovela)</p> <p>6. <i>Lady, la Vendedora de Rosas</i> (series)</p> <p>7. <i>Las Santísimas</i> (series)</p> <p>8. <i>Sala de Urgencias</i> (series)</p> <p>9. <i>Celia</i> (telenovela)</p> <p>10. <i>Doña Bella</i> (telenovela)</p> <p>Canal Uno – 1 title</p> <p>11. <i>Fábrica de Muñecas</i> (series)</p> <p>CO-PRODUCTIONS – 6</p> <p>Caracol – 5 titles</p> <p>1. <i>Tiro de Gracia</i> (Colombia/Mexico)</p> <p>2. <i>La Tusa</i> (Colombia/USA)</p> <p>3. <i>El Señor de los Cielos</i> (Colombia/USA)</p> <p>4. <i>Metástasis</i> (Colombia/USA)</p> <p>5. <i>Señora Acero</i> (Mexico/USA)</p> <p>RCN – 1 title</p> <p>6. <i>Anónima</i> (Colombia/USA)</p> <p>PREMIERE FOREIGN TITLES – 7</p> <p>Caracol – 4 titles</p> <p>1. <i>Ezel</i> (telenovela – Turkey)</p> <p>2. <i>Fatmagül</i> (telenovela – Turkey)</p> <p>3. <i>Tierra de Reyes</i> (telenovela – USA)</p> <p>4. <i>Santa Diabla</i> (telenovela – USA)</p> <p>RCN – 3 titles</p> <p>5. <i>La Vida Sigue</i> (telenovela – Brazil)</p> <p>6. <i>Lo que la Vida Me Robó</i> (telenovela – Mexico)</p> <p>7. <i>María de Todos los Ángeles</i> (telenovela – Mexico)</p>	<p>6. <i>Mil y Una Noches</i> (series)</p> <p>7. <i>La Tormenta</i> (telenovela)</p> <p>8. <i>La Patrona</i> (telenovela)</p> <p>RCN – 15 titles</p> <p>9. <i>Corona de Lágrimas</i> (telenovela)</p> <p>10. <i>Amor Bravío</i> (telenovela)</p> <p>11. <i>Corazón Indomable</i> (telenovela)</p> <p>12. <i>Amor Sincero</i> (telenovela)</p> <p>13. <i>Chepe Fortuna</i> (telenovela)</p> <p>14. <i>La Prepago</i> (telenovela)</p> <p>15. <i>Secretos del Paraíso</i> (telenovela)</p> <p>16. <i>Un Sueño Llamado Salsa</i> (telenovela)</p> <p>17. <i>Ama la Academia</i> (telenovela)</p> <p>18. <i>Brujeras</i> (telenovela)</p> <p>19. <i>Marido a Sueldo</i> (telenovela)</p> <p>20. <i>Carolina Barrantes</i> (telenovela)</p> <p>21. <i>La Madre</i> (telenovela)</p> <p>22. <i>Marilyn</i> (telenovela)</p> <p>23. <i>Por Amor</i> (telenovela)</p> <p>Canal Uno – 4 titles</p> <p>24. <i>La Posada</i> (telenovela)</p> <p>25. <i>Te Voy a Enseñar a Querer</i> (telenovela)</p> <p>26. <i>Besos Robados</i> (telenovela)</p> <p>27. <i>Puerto Amor</i> (telenovela)</p> <p>TOTAL PREMIERE TITLES: 24</p> <p>TOTAL RERUN TITLES: 27</p> <p>TOTAL TITLES BROADCAST: 51</p>
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Source: Ibope Colombia – Obitel Colombia

As can be seen in Table 1, the series is the most representative format in national productions. Additionally, among the premiere foreign titles, there are non Ibero-American productions, such as *Ezel* and *Fatmagül*, both from Turkey.

Table 2. Premiere fiction in 2015: countries of origin

Country	Ti-tles	%	Chapters/ episodes	%	Hours	%
NATIONAL (total)	11	45.8	962	38.7	851:05:00	42.0
OBITEL COUNTRIES (total)	11	45.8	1374	55.2	962:10:00	47.5
NON OBITEL COUNTRIES (total)	2	8.3	151	6.1	213:15:00	10.5
Argentina	0	0.0	0	0.0	0	0.0
Brazil	1	4.2	70	2.8	4:45:00	0.2
Chile	0	0.0	0	0.0	0	0.0
Colombia	11	45.8	962	38.7	851:05:00	42.0
Ecuador	0	0.0	0	0.0	0	0.0
Spain	0	0.0	0	0.0	0	0.0
USA (Hispanic production)	2	8.3	296	11.9	197:15:00	9.7
Mexico	2	8.3	240	9.7	160:00:00	7.9
Peru	0	0.0	0	0.0	0	0.0
Portugal	0	0.0	0	0.0	0	0.0
Uruguay	0	0.0	0	0.0	0	0.0
Venezuela	0	0.0	0	0.0	0	0.0
National co-productions	0	0.0	0	0.0	0	0.0
Ibero-American co-productions	6	25.0	540	21.7	600:10:00	29.6
TOTAL	24	100.0	2487	100.0	2026:30:00	100.0

Source: Ibope Colombia – Obitel Colombia

Regarding premiere fiction, we must highlight the growing importance of co-productions, which were mostly made with the United States, and the balance between national and foreign production.

Table 3. Co-productions

	Titles	Co-producer countries	Producers	Format
Colombia + Obitel countries	<i>Metástasis</i>	Colombia	Caracol	Series
		USA	Sony Pictures	
	<i>Señora Acero</i>	Mexico	Argos	Series
		USA	Telemundo	

	<i>Tiro de Gracia</i>	Colombia	Caracol	Series
		Mexico	Televisa	
	<i>La Tusa</i>	Colombia	Caracol	Series
		USA	Sony Pictures	
	<i>El Señor de los Cielos</i>	Colombia	Caracol	Series
		USA	Telemundo	
	<i>Anónima</i>	Colombia	RCN	Series
		USA	Sony Pictures	
TOTAL TITLES CO-PRODUCED WITH OBITEL COUNTRIES: 6				
Colombia + non Obitel countries				
TOTAL TITLES CO-PRODUCED WITH NON OBITEL COUNTRIES: 0				
Other Obitel countries + non Obitel countries				
TOTAL TITLES CO-PRODUCED BY OTHER OBITEL COUNTRIES + NON OBITEL COUNTRIES: 0				
TOTAL CO-PRODUCTIONS: 6				

Source: Ibope Colombia – Obitel Colombia

Regarding the information provided by Table 3, it is appropriate to note that most premiere co-productions in the country are carried out with major U.S. networks, like Sony Pictures and Telemundo (except for *Tiro de Gracia*, co-produced with Televisa) and they are all series.

The preponderance of prime time and the importance of the morning slot for fiction are evident facts.

Table 4. Chapters/episodes and hours broadcast per time slot

Time slot	National			Ibero-American			Total			
	C/E	%	H	C/E	%	H	C/E	%	H	
Morning (6:00-12:59)	0	0.0	0:00	747	54.4	561:05:00	747	32.0	561:05:00	30.9
Afternoon (13:00-18:59)	0	0.0	0:00	332	24.2	213:05:00	332	14.2	213:05:00	11.8
Prime time (19:00-22:59)	962	100.0	851:05:00	295	21.5	188:00:00	1257	53.8	1039:05:00	57.3
Night (23:00-2:00)	0	0.0	0:00	0	0.0	0:00:00	0	0.0	0:00:00	0.0
Total	962	100.0	851:05:00	1374	100.0	962:10:00	2336	100.0	1813:15:00	100.0

Source: Ibope Colombia-OBITEL Colombia

Table 5. Formats of national and Ibero-American fiction

Format	National			Ibero-American						
	Titles	%	C/E	H	%	Titles	C/E	%	H	%
<i>Telenovela</i>	3	27.3	340	35.3	226:00:00	26.6	5	45.5	461:10:00	47.9
<i>Series</i>	8	72.7	622	64.7	625:05:00	73.4	6	54.5	501:00:00	52.1
<i>Miniseries</i>	0	0.0	0	0.0	0:00	0.0	0	0.0	0:00	0.0
<i>Telefilm</i>	0	0.0	0	0.0	0:00	0.0	0	0.0	0:00	0.0
<i>Unitario</i>	0	0.0	0	0.0	0:00	0.0	0	0.0	0:00	0.0
<i>Docudrama</i>	0	0.0	0	0.0	0:00	0.0	0	0.0	0:00	0.0
<i>Others (soap opera, etc.)</i>	0	0.0	0	0.0	0:00	0.0	0	0.0	0:00	0.0
Total	11	100.0	962	100.0	851:05:00	100.0	11	100.0	962:10:00	100.0

Source: Ibope Colombia – Obitel Colombia

In national productions, there is an essential preponderance of series over *telenovelas*. In the Ibero-American case, the situation is similar between both formats.

Table 6. Formats of national fiction per time slot

Format	Morn- ing	%	After- noon	%	Prime time	%	Night	%	To- tal	%
<i>Telenovela</i>	0	0.0	0	0.0	3	27.3	0	0.0	3	27.3
Series	0	0.0	0	0.0	8	72.7	0	0.0	8	72.7
Miniseries	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Telefilm	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
<i>Unitario</i>	0	0.0	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	0	0.0
Otros (soap opera, etc.)	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Total	0	0.0	0	0.0	11	100.0	0	0.0	11	100.0

Source: Ibope Colombia – Obitel Colombia

The importance given to national productions stand out, since all premiere fiction titles were broadcast at prime time. Additionally, it is noteworthy that most productions, like the previous year, are series.

Table 7. Time period in which fiction is set

Time period	Titles	%
Present	9	81.8
Period	0	0.0
Historical	2	18.2
Other	0	0.0
Total	11	100.0

Source: Ibope Colombia – Obitel Colombia

The main time period in which fiction is set refers to the present, in nine out of the 11 national productions. Additionally, one of them is historical, by narrating the lives of two characters during the late 20th century in the field of music.

Table 8. The ten most watched titles: origin, rating, share

Title		Country of original idea or script	Producer (country)	Channel	Scriptwriter or author of original idea	Rating	Share
1	<i>Diomedes, el Cacique de la Junta</i>	Colombia	RCN – Colombia	RCN	Fernán Rivera, Juan Carlos Troncoso, Sandra Gaitán, Pedro Hernández	13.06	38.52
2	<i>Lady, la Vendedora de Rosas</i>	Colombia	RCN – Colombia	RCN	Lina Arboleda, Pedro Miguel Rozo, Juliana Lema	12.97	42.21
3	<i>Las Hermanitas Calle</i>	Colombia	Caracol – Colombia	Caracol	Cesar A. Betancourt	10.26	21.91
4	<i>Sala de Urgencias</i>	USA	RCN – Colombia	RCN	Jörg Hiller	9.99	35.62
5	<i>Celia</i>	Colombia	Fox Telecolombia – Colombia	RCN	Andres Salgado, Paul Rodriguez	9.28	22.34
6	<i>Laura, la Santa Colombiana</i>	Colombia	Caracol – Colombia	Caracol	Ana Maria Parra	7.94	23.83
7	<i>El Laberinto de Alicia</i>	Chile	RCN – Colombia	RCN	Tania Cárdenas, Santiago Ardila	7.79	24.16
8	<i>La Viuda Negra</i>	Colombia	Televisa – Mexico Caracol – Colombia	Caracol	Gustavo Bolívar, Yesmer Uribe	7.45	29.44
9	<i>Niche</i>	Colombia	Caracol	Caracol	Arlet Castillo	7.41	22.74
10	<i>Tiro de Gracia</i>	Colombia	Caracol – Colombia Televisa – Mexico	Caracol	Jörg Hiller	7.29	21.59
Total productions: 10				Foreign scripts: 2			
100%				20%			

Source: Ibope Colombia – Obitel Colombia

The ten most watched titles of the year allow observing the repositioning of RCN as a leading network in the country, gaining four of five first places in line. However, Caracol still maintains considerable importance by placing five of its productions among

the most watched titles, which denotes the domain of both networks in Colombian production.

Table 9. The ten most watched titles: format, length, time slots

	Title	Format	Genre	Number of chap./ ep. (in 2015)	Date of first and last broadcast (in 2015)	Time slot
1	<i>Diomedes, el Cacique de la Junta</i>	Tele-novela	Drama	195	01/13-10/29	Prime time
2	<i>Lady, la Vendedora de Rosas</i>	Series	Drama	77	06/16-09/28	Prime time
3	<i>Las Hermanitas Calle</i>	Series	Drama Comedy	81	09/02-cont.	Prime time
4	<i>Sala de Urgencias</i>	Series	Drama	62	03/10-06/12	Prime time
5	<i>Celia</i>	Tele-novela	Drama	56	10/05-cont.	Prime time
6	<i>Laura, la Santa Colombiana</i>	Series	Drama	24	07/29-09/01	Prime time
7	<i>El Laberinto de Alicia</i>	Series	Drama	30	01/14-03/09	Prime time
8	<i>La Viuda Negra</i>	Series	Drama Action	78	01/05-01/09	Prime time
9	<i>Niche</i>	Series	Drama	32	01/13-03/06	Prime time
10	<i>Tiro de Gracia</i>	Series	Drama Action	56	03/09-05/29	Prime time

Source: Ibope Colombia – Obitel Colombia

In terms of fiction genres, the preponderance of drama stands out as a central element of fiction. Additionally, it is quite important to note that the only series with action elements, *La Viuda Negra*, manages to position itself among the top ten with only a few chapters issued in the year and corresponding to its ending. Finally, the preponderance of series is such that only two *telenovelas* are among the ten most watched titles.

Table 10. Themes in the ten most watched titles

Title		Prevailing themes	Social themes
1	<i>Diomedes, el Cacique de la Junta</i>	Music, drugs, alcohol, fame, tradition, love.	Cultural tradition, professional success.
2	<i>Lady, la Vendedora de Rosas</i>	Violence, overcoming poverty, friendship, family, love.	Self-improvement, lack of resources and opportunities, family relationships.
3	<i>Las Hermanitas Calle</i>	Fraternity, fame, music, corruption.	Self-improvement, musical tradition, professional success.
4	<i>Sala de Urgencias</i>	Love, competition.	Family, social reality.
5	<i>Celia</i>	Fame, corruption, politics, music, love.	Cultural tradition, professional success, politics, corruption.
6	<i>Laura, la Santa Colombiana</i>	Evangelization, politics, love, solidarity, power.	Cultural tradition, family.
7	<i>El Laberinto de Alicia</i>	Suspense, intrigue, corruption, deceit, lies.	Domestic violence, corruption, love.
8	<i>La Viuda Negra</i>	Revenge, death, power, violence.	Drug trafficking, corruption, power, money laundering.
9	<i>Niche</i>	Music, fame, tradition, love, corruption.	Companionship, friendship, personal development, cultural tradition.
10	<i>Tiro de Gracia</i>	Revenge, death, power, violence.	Drug trafficking, violence, drugs, mafia.

Source: Ibope Colombia – Obitel Colombia

Among the most viewed productions in 2015, the prevailing themes are: violence, corruption, power, love, self-improvement and cultural tradition as general context of the narrative, which manages to enrich the series format.

Table 11. Audience profile of the ten most watched titles: gender, age, socioeconomic status

Title	Channel	Gender %		Socioeconomic status %		
		Women	Men	AB	C	DE
1 <i>Diomedes, el Cacique de la Junta</i>	RCN	15.7	11.1	15.6	11.6	8.8
2 <i>Lady, la Vendedora de Rosas</i>	RCN	16.1	10.8	12.5	10.2	8.8
3 <i>Las Hermanitas Calle</i>	Caracol	12.6	8.9	9.92	11.2	9.6
4 <i>Sala de Urgencias</i>	RCN	13.3	7.5	11.5	8.4	8.7

5	<i>Celia</i>	RCN	11.8	7.6	10.0	8.8	8.4
6	<i>Laura, la Santa Colombiana</i>	Caracol	10.4	6.6	8.2	8.5	7.5
7	<i>El Laberinto de Alicia</i>	RCN	10.8	5.7	8.0	7.7	7.4
8	<i>La Viuda Negra</i>	Caracol	8.9	6.8	9.2	6.1	5.2
9	<i>Niche</i>	Caracol	9.5	6.1	7.3	7.4	7.8
10	<i>Tiro de Gracia</i>	Caracol	8.8	6.7	7.7	7.0	6.6

	Title	Channel	Age group %				
			4-11	12-17	18-24	25-39	40+
1	<i>Diomedes, el Cacique de la Junta</i>	RCN	10.0	20.3	16.3	23.6	33.9
2	<i>Lady, la Vendedora de Rosas</i>	RCN	8.9	24.4	19.9	23.8	31.7
3	<i>Las Hermanitas Calle</i>	Caracol	6.5	14.5	11.6	14.5	31.1
4	<i>Sala de Urgencias</i>	RCN	6.1	18.5	14.4	20.5	23.7
5	<i>Celia</i>	RCN	6.0	13.5	11.3	18.4	24.0
6	<i>Laura, la Santa Colombiana</i>	Caracol	3.8	10.2	9.7	12.6	23.8
7	<i>El Laberinto de Alicia</i>	RCN	4.1	12.2	10.4	15.2	20.1
8	<i>La Viuda Negra</i>	Caracol	4.6	13.1	13.0	13.6	18.5
9	<i>Niche</i>	Caracol	4.3	13.2	11.8	11.9	19.7
10	<i>Tiro de Gracia</i>	Caracol	4.0	13.3	10.8	12.7	19.5

Source: Ibope Colombia – Obitel Colombia

The audience profile demonstrates a marked inclination of the female gender to viewing these productions. Similarly, the preponderance of adult audiences for the most watched fictions becomes latent, which clearly shows the type of receptors for these contents.

Synthesis

The year 2015 has several elements that must be highlighted regarding the analysis of premiere fiction and the most watched titles. On the one hand, co-productions have increased markedly as a sign of quality of production in Colombia and internationalization of national talent, in an interesting process of creative exchange with other markets and producers. On the other hand, Caracol and RCN

have the most watched fictions, highlighting the return of the latter to the top of the list after a couple of years of absence. Finally, we must emphasize the importance of drama and melodrama as an engine of most fiction productions and that, despite having nine series in the top ten list, the first is a *telenovela*.

3. Transmedia reception

Transmedia production in Colombia is at a time of initial development and an important juncture facing changes and innovations of genres, formats and possibilities for new developments in the digital arena. Although so far the only initiative completely transmedia to be performed is planned for 2016, under the name of *Paciente*, and curiously under the production of a national public channel, in 2015 there were timid attempts by the integration of languages and platforms that, as in previous years, more than offering a narrative type of transmedia, allowed glimpsing productions that begin to establish very basic connections between the small screen and the spaces of cyberculture.

However, this feature of productions has allowed that, in recent years, new fictions appear in different formats and scenarios, such as cinema, documentary and television, moving around axes of meaning that have to do with issues arising daily and the realities of the communities. This last point triggered a strong impact on the use of platforms, blogs, social networks and other virtual atmosphere. Thus, the connection to phenomena or real social problems, as well as with the lives of some characters that are iconic in national life due to different aspects and that are quite attractive to the audience, become the backbone of the narrative, giving continuity to their stories or looking to complement them through different productions. In 2015, this was the case of *Lady, la Vendedora de Rosas*.

This story has as its primary reference in Colombia the movie *La Vendedora de Rosas*, a well-remembered piece in the context of Colombian cinema, which was directed by Victor Gaviria, in 1998,

and awarded in different film festivals. About the film and the life stories of the different characters (in particular its protagonist, Lady Tabares), documentaries and reports were made in different media and, finally, last year, the series for television called *Lady, la Vendedora de Rosas* was launched. In this production, the plot revolves around the character of a humble girl who sells roses on the streets of Medellín, showing many aspects of the social reality of this city and the Colombian context in general, recreated with a strong melodramatic tone, typical of those hybridizations fiction formats and genres in the country.

Consistent with this idea, to perform it as a narrative related to the film (without being a continuation of the same, but a look at the making of the film from the protagonist point of view), the starting point is the exposition of the girl's personal life and context, so that it becomes possible to establish such verisimilitude, without strong distortions between fiction and reality. This aspect generated certain dynamics in the audience related to taking patterns of behavior, identity and transformation of language towards building a slang widely used in networks, with references like “me dio muxa tristeza” or “quisque el amigo”.

This linguistic element is also integrated into the creative proposals of the audience, so that the construction of different media pieces – like memes, blogs, videos, among others – is characterized by a collection of phrases and terms used in the language of fiction (series and film). These phrases and terms have become key elements of recognition and identification of audiences, making this product part of the viewers' lives to such a level that it is possible to characterize a very strong rapport with the main character, both in real life and in her fictional representation in the series and in the film. Thus, in three fan pages on Facebook, which were analyzed for this chapter, we found a marked use of images and photographs indiscriminately mixing the ones that belong to the series and the film with pictures of Lady Tabares in her daily life. This aspect is very similar to RCN website, where episodes of the series are combined

with interviews given by the real person who inspired the recreation of his/her life on the small screen.

Thus, the 16,285 followers of one of the pages, as well as 59 of a community and 5,034 of another space on Facebook created by fans, presented as common element the sharing of numerous images of chapters and its development, as well as the use of direct links to the official website or photographs of Lady Tabares, her role in the film of Victor Gaviria and the actress who represents her in the series. This level of interaction, while prevents a full interactive viewing, is an opportunity, along with a hefty number of “likes”, which sometimes exceeds 300 per image, of conforming a very important scenario of discussion at the level of users and an interesting demonstration of the degree of internalization to the content of fiction, as well as Lady’s real life.

This aspect is the one that justly makes us think of intimacy as a central element for establishing connections in the transmedia scenario, allowing that interaction with reality acquire a subjective dimension that becomes the bridge for accepting multiple languages converging around the same topic. This is explained to the extent that, while this fiction is not intended as a transmedia narrative, the use of multiple platforms, languages and resources achieves its impact due to the successful connection with the audience and this feeling that melodrama presented is a reflection of the vicissitudes that one can live in everyday existence. Lady is familiar, close and it is possible to get into her life by multiple ways; then, the path for the reception is marked by an intimate and personal connection, which, linked to the serialization of the story, the supports of video with the real person in the website and environments created by fans, forms a transmedia universe that becomes deeply meaningful to the audience.

This is a central point in which this fiction presents one of the horizons that characterize more strongly those first overtures to transmedia and where, rather than establishing a narrative that goes through several devices, what is set is an interrelationship between

different products linked by common axes of significance. So, *Lady, la Vendedora de Rosas* is a part within a whole composed by the film, the website, the pages on social networks created by fans, the life of Lady Tabares and television fiction, whose central axis is the protagonist.

Such universe influences, at reception level, the shaping of a deep connection with the cardinal elements of fiction. Additionally, it promotes high degrees of interactivity between users who demand a more active participation of producers, since in the pages of fans, the critics and even new applications of seasons, are the proof of the transformations of audiences in a time of mutations in formats and genres.

Transmedia production and reception in Colombia remains a scenario under construction and, as with genres and formats, is in a process of transformation marked by the importance of digitization and the use of social networks. Cases like *Lady, la Vendedora de Rosas* allowed us to identify two central features of the first transmedia attempts: appealing to a sense axis centered on intimacy and bringing the fictional discourse to everyday life. Such a design of a convergence universe leads the viewers to place the relationship between everyday life and what is seen on screen as the main engine for identification with fiction and, additionally, as the raw material for creative processes, for changing their language uses and for a critical potential, which urgently requires greater participation of the producers to develop a complete interactivity and follow up this transmedia scenario where there are abundant resources, but higher levels of interaction beyond the mere viewing of the contents are needed.

4. Highlights of the year

In 2015, the horizon of television fiction in Colombia again demonstrates the dominance of the series format, represented in eight of the most watched productions, compared to only two positions occupied by *telenovelas*. However, it is important to note that,

in most cases, the central axis of the stories is the life of a recognized character. Also, in terms of production, the agility of seriality, the strong influence of melodrama and the use of filmmaking techniques are evident.

Thus, in first place is *Diomedes, el Cacique de la Junta*, which chronicles the life of Diomedes Diaz, one of the most famous singers of Colombian folk music. Little Diomedes grows in a humble home and must assume great responsibility to help his large family at an early age. His penchant for music comes from heartbreak and Diomedes gradually begins to enter the world of *vallenato* (a Colombian rhythm) with great success. The story revolves around the ups and downs of his life due to his loving instability, which, by the one hand, cost him two divorces, many drawbacks and addiction to alcohol and drugs and, by the other, affected his professional life, his health and prestige till the point to involve him in a murder. Still, even after getting rid of the criminal charge, his life would never be the same and that event marked the descent of a big star.

In second place is *Lady, la Vendedora de Rosas*, based on the life of Lady Tabares, a girl born in the poor area of Medellin that is forced to steal roses from the gardens of an exclusive neighborhood of the city to sell them at stoplights and, thus, contribute to the rent payment of the modest place where she lives with her mother and younger brother. Soon, an advocate of children discovers that the little Lady works and decides to send her to an orphanage while her status is defined. At the orphanage, years later, Lady meets a film director who seeks natural actors for moviemaking and who falls in love with her energy and boldness. Lady's life is marked by the vicissitudes and the precariousness of those who are forced to survive in a harsh world at any price.

The third place is occupied by *Las Hermanitas Calle*, a series that chronicles the life of Fabiola and Nelly, two talented young sisters who venture into the world of *carrilera* music by the hand of their maternal grandmother, Edelmira, who constantly motivates them to sing and show their talent. Despite the many vicissitudes

and disappointments, the sisters manage to establish themselves as excellent *carrilera* artists, being called “Las Musas del Despecho” or “Las Reinas de la Canción Cantinera”. The story shows that the determination and the constant struggle to get ahead sometimes bear fruit.

Fourthly, comes *Sala de Urgencias*, a series showing the tensions and conflicts experienced by doctors in a hospital where people’s lives are in the hands of these professionals, who must decide quickly and calmly what to do in each case. Such decisions as well as challenges of their personal life and their various conflicts make their emotions to surface at the most unexpected moments, making, even amidst such situations, loving feelings arise, which inevitably affects the working atmosphere and relationships with peers.

The fifth spot belongs to *Celia*, a *telenovela* that tells the story of a talented young Cuban who, despite her humble origins, unattractive appearance and race, manages to emerge in the world stage of her time as one of the most outstanding stars of Latin American music. The production shows her professional career from its beginning, chronicles the difficulties, obstacles and struggles of a woman who knew how to win the heart of the worldwide audience. Her painful departure from Cuba, where she leaves her family, including her mother, who had cancer, marks the consolidation of her successful career. However, it did not mean the ending point, since she had ahead many challenges, both personal and professional, which, thanks to her philosophy of life and positive attitude, she always managed to overcome.

In the sixth place is *Laura, la Santa Colombiana*. This series tells the story of Laura Montoya, a girl rejected by her family and confined in a nunnery where she receives instruction to be an educator. Later, the young missionary, anxious to learn and be qualified for teaching, decides to go to college, but there is discrimination and rejection due to the issues about her childhood. Far from being discouraged by the obstacles, Laura decides to continue her mission and, years later, she becomes the best exponent missionary in

Colombia, thanks to the foundation of the Congregation of the Missionary Oblates of Mary Immaculate and St. Catherine of Siena.

El Laberinto de Alicia is in seventh place, a series that addresses the complex issues of abuse and harassment suffered by Valentina, a fragile and sweet girl from Los Angeles School. Alicia, who is the psychologist of the school, is determined to go to the bottom of the case and suspected that the case of Valentina has to do with an episode she starred and in which Ramon Garmendia, a renowned child psychiatrist, was captured. The story is surrounded by suspense, mystery and tension guided by Alicia in a path which is uncertain and full of surprises.

Afterwards, comes the eighth title: *La Viuda Negra*, a series that tells the story of Griselda Blanco, a drug dealer nicknamed “queen of coca”. It shows how she becomes a vengeful and murderous woman due to a life marked by abuse and betrayal, until she gets face to face with death. In 2015, the final chapters were broadcast, which managed to locate the series in a high place in the audience ratings, as a fiction of great importance and that exemplifies the power achieved by a format that is kept among the ten most watched titles, despite offering only its final chapters.

In ninth place is *Niche*, a series portraying some episodes of the life of the leader of Grupo Niche (a salsa group). Ivan Cuero is a talented young man who finds in music a way to express his feelings, inspiration and inspire others. However, Ivan’s father, who is a musician, wishes his son choose another profession.

In the last place is *Tiro de Gracia*. This series portrays the intricate story of a famous drug trafficker and murderer named Vicente Vallejo, known for his cruelty and viciousness, and that, after belonging to the Colombian army and being discovered by his relations with the mafia, is imprisoned only to escape and continue committing crimes.

The highlights of 2015 show a significant tendency to portray the lives of characters of great importance in popular culture and Latin American identity. Whether for outstanding their professional

career or their wrongdoings, these characters are as subjects of a destiny marked by their conflicting lives, in which a marginal childhood, a rejection, a traumatic experience or lack of love become motivating factors to make them great artists, saints or, in the worst case, drug dealers. The truth is that their lives are shown as the result of the circumstances and the decisions that at a certain time define their destiny.

5. Theme of the year: (re)invention of TV fiction genres and formats

TV fiction in Colombia presents a major transformation in terms of genres and formats due to the presence of new scenarios and platforms for television consumption as well as a large number of changes in production and reception processes. In this scenario, new ways of looking and the assimilation of various structures come up, inherited from film and or derived from the immediacy and transience of new media ecologies.

Fiction: between *telenovela* and series

As noted in previous reports, Colombia has been experiencing a gradual displacement of fiction format, from *telenovela* to series, although in many cases the development of production and reception process remains in a kind of gray area regarding identifying content in relation to one or another format. *Telenovela*, which was the largest genre in Latin America and particularly in Colombia, has been decreasing because of the convening power of the series, which means that, regarding the most watched titles of the year in the last period, the predominance of series is evident over *telenovelas*.

Some reasons to try to explain this transformation can be posed in these terms: the series format proves to be much more agile, efficient and practical, even more versatile for audiences, given the changes that digital change has intensified and the increasing audiovisual platforms available to the viewer, unlike television. As not-

ed in various studies, such as Piñón (2016) and Newcomb (2005), among others, the series can be consumed and enjoyed by the viewer with criteria and parameters much closer to their interests, expectations and needs of tastes and times. It means that they do not need to be subject to strict and restrictive schedules, as in the case of TV channels, since their programming was vertically available, as well as the schedules and rhythms with which the consumer would have to enjoy the production, being subordinated to the interests and decisions of the channel. Today, with technological openness and increased interactivity, in addition to the control the consumer has in the form of multiscreen and expanding the offer from platforms like Netflix and other OTT systems, the contents can be viewed according to particular inclinations: watch the series as a whole in one sitting, watch blocks, watch it as many times as possible. Thus, the consumer has complete control over the reception process and forms of enjoying the contents of those most successful programs.

Another reason why the series format is so successful and overcomes the *telenovela*, or subordinates it to its own dynamics of content production and development, resides on issues such as the ease with which the series approach themes and dose its developments in narrative structures that are grouped diversely, without losing functionality. It facilitates viewing in a kind of progressive chain of micro-stories that directly refers to what some authors call seriality (Newcomb, 2005), but that also sets a number of interest foci where narrative units can be grouped in various ways and generate arcs that are not only interconnected, but also create different sensations and identifications on viewers. Faced with the apparent melodramatic unit of *telenovelas*, series offer sets of emotions, time scales, characters and stories that bring a high level of dynamism to the recreated situations and a high *multiplexity* (Lipovetsky, 2007) to the audiovisual image.

However, in the case of the series in Colombia, its *multiplexity* character is the heterogeneous condition of narrated situations and is due to the ability to recreate themes and issues that pass directly by

the audience's everyday events. This obviously influences the success, acceptance and recognition of the series as the dynamic mirror that feeds back those everyday events by allowing the viewer to almost become the accomplice of the protagonist – which can be considered “appealing to privacy”, since the viewer is identified there.

The series plays a game that recreates the story of a life with conflicts and drama that arises from every day happenings. However, this power to make people unitholders of a story that happens on the screen, rather than generate a clear dividing line between *telenovela* and series, ends up generating a kind of gray area, since the series produced in Colombia have differential marks, because they include key elements of cultural, regional and national identity with which they mobilize components of the *telenovela* melodramatic type and capacity to idealize.

Thus, although life is recovered, the legend is exalted, as was the case of *El Capo*, *Las Hermanitas Calle*, *La Selección* and other productions in which the border was not clear, being even considered as *telenovelas* by the audience. This feature of domestic production can be understood by comparing the hybridization of the Colombian series with the productions offered by pay TV or streaming services. For example: the structural and background differences between a national series, such as *Escobar, el Patrón del Mal*, and *Narcos*, by Netflix, which, although based on the same character, run the development of the story from a different concept of series and with completely distinct narrative, argumentative and management arcs of drama.

However, despite this gray area that easily falls into confusion between series and *telenovela* and in which the hybridizations, proper of the *multiplexity*, are generated, it is worth noting the advance obtained regarding the recovery of orality through music. In national fictions, songs also tell stories, involving the country, the people and the largest symbols. The power of music as speech is reinforced in the light of the ability of remembrance that can arouse in people while showing a collective sense. Thus, there is a high presence of

musical production, with the adaptation of the life of singers or musical groups, such as *Niche*, and songs as places to tell tragedies and dramas or relive times, as the main theme of *La Selección*.

Thus, in the Colombian panorama, the horizon of fiction is torn between the presence of some *telenovelas* and the predominance of series, although the borders and differences between them remain unclear. Domestic production establishes as central criteria in the production of its series both the development of an intimate sphere and the exploration of everyday stories and narrative arcs in which music accompanies the heterogeneity of characters, situations and stories that are woven into these formats and genres that reinvent, vary and innovate in the panorama of fiction and that reveal the transit of such unidirectional and extensive logics of the *telenovelas* to a scenario in which seriality, multiplexity and dynamism are a framework necessary for the transformation of fictions' landscape in the nation, in accordance with changes in the sensibilities and looks proper of a fleeting, ephemeral and digital era.

The series and the biopic

An experiment of audiovisual narrative, extensively explored in the cinema, is the story of life of one or more real characters from a fictional adaptation of events of its existence, which has been called "biopic". It is a conceptual and production bet in which fiction is no longer a pure genre and draws on reality. In Colombia, it has been quite successful and productive for domestic producers and has taken the screen during the last five years as a formula for the use of privacy (Newcomb, 2005) that can be created between the viewer and the content and also as a way to make feasible the idea of "the spirit of cinema" (Lipovetsky, 2007).

In this regard, the role of the spectator and the audience in front of the screen is a central element as well as the way how the relationship between narrative and life becomes narrower when they chronicle the vicissitudes of the iconic figures of national history and musical, sporting or cultural idols who have occupied the Colombian

landscape. Thus, in regard to the receiver, an absolute recognition capability of the vitality narrated on screen is maintained, allowing to understand the content and with a high degree of identification, as an effect of narrative proposal that keeps treatment within the individual recreated as a public figure and symbolic reference, without falling into the over-idealization of ethical, moral or romantic type, but presenting him/her as someone who, despite individual aura and public recognition that makes it different or transcendent, is real and close to people. This is a process of intimacy and approach, a window that opens to the existence of this unique character that have a lot in common with whom observes him/her on the screen.

This action of identification by effect of the intimacy can be clearly seen in series like *Laura, la Santa, La Selección, Niche* and even in *telenovelas* like *Celia* and *Diomedes, el Cacique de la Junta*, where production and narration techniques are used with abundant audiovisual resources from cinema and that express a particular way to produce, compose, narrate and show events. Thus, a hybrid work is generated, mixing film and television production systems, which results in a reinvention and an important innovation regarding techniques and the processes of production, scriptwriting and broadcasting.

In this fusion of series and biopic, the result is a kind of extension of the cinema, where the dramatization and multiplexity (Lipovetsky, 2007) prevail as conditions that dominate over a process that has an intimate atmosphere and where the fictionalized lives of the heroes become even more plausible and understandable than reality. This is a process in which the small screen has assumed power in the use of the image of cinematography, adding the vitality of a multiscreen scenario, which grows with the emergence of digital platforms and different forms of receptions. The act of sitting in front of the TV is replaced by watching on any screen a content that may not only recreate life but, due to its ability to generate intimacy, is virtually one's own life.

Netflix, streaming, webseries and changing television

In Colombia, the entry of film production in the development of television products is not only related to the series and television productions broadcast on the small screen but also reflects that a remarkable change has occurred in terms of consumption habits. This change is due to the rise of digital systems and one of the greatest phenomena of recent years: Netflix and its increasingly important role in the national reality, both because it has more than 600,000 subscribers in the country and for being in the center of the debate with national cable operators, regarding the regulation of its content system by ANTV or the possibility of contributing with taxes for public television.

However, the phenomenon of Netflix and other OTT, VoD and streaming systems is nothing but the proof of one of the key transitions that are taking place in Colombia in terms of genres and formats. Marked by innovation, easily accessible and in tune with multiscreen environments without limitations of time or resources, these new platforms have changed the way we see, understand and build an interpretive universe. Not surprisingly, the rate of consumption and production of series grows rapidly (even with participation of national producers, like Dynamo, in the case of *Narcos*) along with the proliferation of systems like ClaroVideo, MovistarVideo and channels' platforms like HBO, ESPN, among others, which have become preferred by audiences and amount to more than 4.7 million subscribers, demonstrating greater importance to the current fiction consumption in the nation.

Such is the importance of on-line formats that Colombia has been also working with the webseries format, produced for digital channels such as YouTube and in which audiovisual narrative productions that are specifically designed to be issued by platforms different to the screen are not excluded, and they can even reach to integrate it by technological convergence in the multiscreen format. Given the acceptance of this new format on a general level in other countries, in Colombia there are some cases already, like webseries

Del Otro Lado, by Indiana Films, winner of IndieFest in California and invited to the WebFest in Berlin and Miami. Thus, new players enter the market (that is, small producers), which, having the technological resources, are able to venture and create in these small formats and that have the opportunity to start producing for these new audiences that are behind the digital screens.

Public television, the community audiovisual production and new formats

Regarding the exploration of new fiction formats, an interesting paradox is presented on the stage of audiovisual production: the scenario in which the bravest and most daring efforts are woven is precisely the space of public television. Despite the handicap due to scarce resources and low ratings, some contents are generated, in which not only the quality of technical production stands out but also the search for new languages, as with the first transmedia project in the national screen, which began to take shape in 2015 with *Paciente*, on public broadcaster Señal Colombia. This was a risky effort, consisting of a documentary, five short films and two texts in digital platform, forming a block of exploration of formats, techniques and possibilities in the digital stage and on open-access platforms, along with interesting bets of community audiovisual production and use of networks to build audiences as well as thematic and discursive references, with social sensitivity, oblivious to the political neutrality. This is a response to another way of joining the audiovisual issue and reality, which becomes true alternative for audiences emerging in the digital spaces.

Synthesis

In Colombia, a major transformation of genres and formats marked by changes and innovation is presented. In this sense, the essential change goes through the preponderance of the series over the leading role of the *telenovela*, being the biopic essential in the production, as an engine of fiction and an important sign of hybridiza-

tion between cinema and TV, at technical and narrative level, with support of conditions such as privacy, seriality and multiplexity, added to the exploration of increasingly close relations between the narrative and everyday life. In this same scenario, the consumption of digital platforms, such as Netflix and various streaming systems, plays an important role as well as the production of webseries and the attempts of public television to the renewal of languages and the use of new techniques in fiction, in an interactive relationship with audiences whose profile is no longer passive, facing a single device, but a restless observer-creator in a multimedia ecology.

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5

ECUADOR: NATIONAL FICTION DOES NOT REACH 60% ESTABLISHED BY LAW, CONTENTS ARE WATCHED THOUGH

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1. Ecuador's audiovisual context in 2015

Considered as the year of full application of Organic Law of Communication (LOC, in Spanish) and its regulations, 2015 also presented, as to audiovisual production, a large amount of educational content made by some State Ministries; however, according to the registration means of Regulation and Development of Information and Communication Council (Cordicom, in Spanish), informative, educational and cultural contents represented only 28% – number which is even under the average required by Law. Additionally, this registration requires TV media to be 7.21% of all media in the country, meanwhile audio and video subscription systems must represent 7.30%.² Another aspect to be highlighted during this period of time is a number of penalties applied by Information and Communication Superintendence (Supercom, in Spanish) on some information media, such as *La Hora* (Quito) and *Expreso* (Guayaquil) dailies; these penalties were applied because they did not post the corre-

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² Consejo de Regulación y Desarrollo de la Información y la Comunicación (2016). *Informe de rendición de cuentas*. Recovered on April 14th, 2016 from http://www.cordicom.gob.ec/rendicioncuentas/rendicion_cuentas_2015.pdf.

sponding reply, which was ordered by the State Institution, facing an announcement from Ecuadorian Association of Newspaper Editors (Aedep, in Spanish).³ Futbol Radio FM was also penalized for broadcasting certain content that did not fit the focused audience and was out of schedule; furthermore, they mentioned specifically hard words, such as “lover” and “paramour”.

Additionally, *El Comercio* daily (Quito), founded in 1906 by Carlos and Jorge Mantilla Jácome brothers and property of the family and their heirs since then, was sold to Telglovisión, owner of RTS TV channel (Guayaquil) and other media companies in some Latin American countries⁴ as well.

Also, *El Telégrafo* daily, a public company, purchased 49% of *El Tiempo* daily (Cuenca) stocks, which increased the number of media owned by the government.

1.1. Open television in Ecuador

In Chart 1, readers can observe that the amount of open signal television channels in the country has not varied; neither have TC Televisión and Gama TV ownership structure. Both TV channels have been called impounded, but they are now managed by the government; in addition, there is still a little percentage of stocks owned by workers from both companies.

³ Fundamedios (s.d.). Por no publicar réplica de un anuncio, Supercom abre proceso (s.d.). *Fundamedios. Expresión de libertad*. Recovered on April 14th, 2016 from <http://www.fundamedios.org/alertas/supercom-abre-procesos-dos-medios-por-publicar-replica-de-un-anuncio-ordenado-por-esa-misma-entidad/>.

⁴ The main shareholder of Telglovisión is Mexican entrepreneur Ángel González, whose nickname is The Phantom. He is considered as a millionaire that lives in Miami and owns some written and audiovisual media in several Latin American countries. Recovered on April 16th, 2016 from <http://www.planv.com.ec/historias/sociedad/el-retrato-el-fantasma-y-la-venta-el-comercio>.

Chart 1. National open television networks in Ecuador

PRIVATE NETWORKS / CHANNELS (4)	PUBLIC NETWORKS / CHANNELS (1)	IMPOUNDED NETWORKS / CHANNELS (2)
Teleamazonas		Televisión del Pacífico (Gama TV)
Televisora Nacional (Ecuavisa)	Ecuador TV (ECTV)	TC Television
Red Telesistema (RTS)		
Canal Uno		
TOTAL NETWORKS = 4 TOTAL NETWORKS = 1 TOTAL NETWORKS = 2		

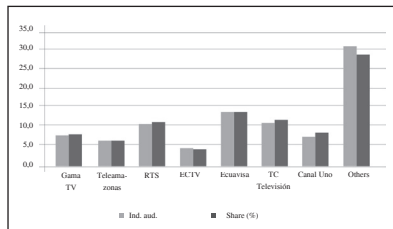
Source: Arcotel/Obitel Ecuador

Ecuavisa confirms its predominance on home viewers: it leads ratings with 14.9%. Its high rate of tuning is evident due to its fiction programs, reaching almost the top ten most seen: six *telenovelas* and two series on their own production, presented on prime time schedule. TC Televisión occupies the next two positions in the table.

Graph 1. TV audience and share by broadcaster

Broadcaster	Ind. aud.	%	Broadcaster	Share (%)
Gama TV	3.1	8.6	Gama TV	8.9
Teleamazonas	2.6	7.3	Teleamazonas	7.2
RTS	4.1	11.5	RTS	12.0
ECTV	1.8	5.1	ECTV	4.7
Ecuavisa	5.3	14.9	Ecuavisa	14.6
TC Televisión	4.2	11.8	TC Televisión	12.6
Canal Uno	2.9	8.2	Canal Uno	9.2
Others	11.6	32.5	Others	30.4
TOTAL	35.6	100		100

Source: Kantar Ibope Media

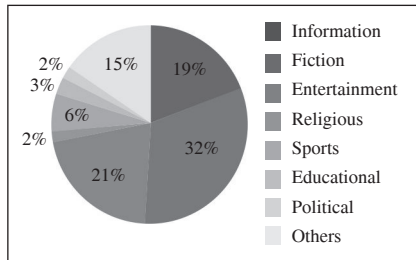


Regarding share, there is still certain tendency to home audience on VHF band: Ecuavisa keeps the first place (14.6%), followed

by TC Televisión (12.6%) and RTS (12.0%); Other 30% of share are in other UHF or regional channels.

Graph 2. Genres and number of hours broadcast on TV programming

Genres broadcast	Total hours broadcast	%
Information	26698:00	18.9
Fiction	45478:00	32.1
Entertainment	29924:00	21.1
Religious	2393:00	1.7
Sports	8804:00	6.2
Educational	4035:00	2.9
Political	2346:00	1.7
Others	21850:00	15.4
TOTAL	141529:00	100



Source: Kantar Ibope Media

Regarding television genres offer, it is clear that fiction and entertainment contents catch the majority of audience, even though there is an important difference if compared to last year data. Entertainment rate reduced six points, meanwhile fiction increased two points. Information and the rest of genres remain constant, a situation that suggests LOC and its regulations have been applied.

According to Cordicom data presented on media registration, TV stations broadcast programs in which entertainment represents 40%. This information differs from Kantar Ibope Media data, where entertainment reaches just 21%. This is, surely, because data taken from the official source include national and regional UHF and VHF channels.

1.2. Audience trends in 2015

In 2015, a new generation of *telenovelas* appears on Ecuavisa screen to turn Ecuadorian viewers culturally. *Las Mil y Una Noches*

and *¿Qué Culpa Tiene Fatmagül?*, Turkish productions, caught audience attention with their sceneries, characters and customs little known in Ecuador. The first one took prime time during more than eight months (from March to November) and it also got audience interest, some even wanted to know the country, origin of such productions. Three years ago, with lower intensity, South Korean *telenovelas* opened an interesting door to Ecuadorian audience, even though, with a culture completely different from ours, they have not reached high rating yet, perhaps because they have not been presented on prime time.

However, referring these two cases of foreign origin, the question is: Why do Turkish and South Korean *telenovelas* catch viewers from a different culture like Ecuadorian? It is such a risk to think that stories they present include romance with a different focus from what we see and live on this side of the planet, or to think that people keep certain traditions related to love and couples in those countries of origin. Above all, it is curious the way women are treated by men, or what kind of roles men and women play in families and in a society where there is a leader who has strong patriarchal authority features. Fortunately, these features have decreased in our country, at least in urban areas.

It is important to remark that *telenovelas* costs are not only the plus they have to be broadcast, but also they have good narrative content and neat technical features, which are expressed by catching viewers' attention and interest.

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

According to Kantar Ibope Media, despite Ecuavisa dominates ratings and TV fiction top ten, it drops from the second to the fourth place in catching advertising (17.1%); Gama TV, channel impounded by the government, shows the highest advertising investment in 2015 (22.2%); TC Televisión, another impounded channel, keeps its third place (19.1%); and, Ecuador TV, public channel, with investment mainly from the government, catches less than 1% of the total.

1.4. Merchandising and social merchandising

Like it happened in previous years, 2015 did not register any merchandising actions or strategies on any TV fiction productions presented this year.

1.5. Communication policies

Considering amendments and reforms made to the Constitution and approved by National Assembly in December 2015, article 284 was changed, to which a subparagraph was added: “Communication, as a public service, will be provided through public, private and community media”.⁵ Thus, it is settled that communication is a public service, that is, a State matter. Ecuadorian Constitution also settles that communication is a right, this is, a citizens’ matter. There is uncertainty about what definition will be used and what circumstances will be considered, causing disagreement between government and citizens regarding communication and media.

This is a way of strengthen some articles in Organic Law of Communication (LOC) that establish a series of stimuli which let the government create contents: article 8 states what media must broadcast: “informative, educational and cultural content as frequent as possible”. They must have quality and refer values and rights established in our Constitution. Article 49, number 4 states that Cordicom will establish mechanisms to “present variety of programming tending to present cultural and educational programs”.⁶

Audiovisual media must, under article 74, paragraph 3, broadcast one not accumulative hour without charge every day, for State programs produced by authorized Ministries and Secretaries with the following kind of content: education on TV, culture, healthiness and rights. This last article of LOC permits Educa channel to generate contents made by Ministry of Education.

⁵ Ecuador (2008). *Constitución de la República del Ecuador* (p. 227). Quito: National Assembly. Recovered on April 12th, 2016 from <http://www.asambleanacional.gob.ec/sites/default/files/private/asambleanacional/filesasambleanacionalnameuid-20/transparencia-2015/literal-a/a2/Const-Enmienda-2015.pdf>.

⁶ Recovered on April 12th, 2016 from the same URL mentioned above.

State media, like ECTV, according to Article 80, literal 9, must set as objective “to have educational, cultural, recreational and entertaining content and contribute to have a good life”. Thus, public television and Economic and Social Inclusion Ministry (Mies, in Spanish) have produced contents for children, such as *Veó Veó*. All audiovisual contents presented by the government agree with Good Living National Plan (PNBV, in Spanish).

Article 6 of LOC prohibits purchasing communication media companies addressed abroad or owned by foreigners living abroad. The regulations of LOC clarify this prohibition, which is supported by article 425 of the Constitution that refers laws hierarchy; through this article, countries that have international agreements on commercial cooperation or complementary economy shall prevail before the law. Therefore, Ángel González, a media mogul, purchased *El Comercio* daily easily, in spite of living abroad. He did it through Telglovisión, as the largest shareholder of a Uruguayan company. There is a total of 17 communication media linked to González, who also owns RTS. There was an investigation about González’s media carried out by a local daily; however, the government discredited this information on television network.

In 2015, Supercom penalized some television media. Teleamazonas was, on February 13th, the first television company penalized for media lynching, applying Article 26 in favor of the ex-president of Soccer Ecuadorian Federation (FEF, in Spanish), Luis Chiriboga, for having broadcast several sketches in which a puppet called “the engineer” characterized the ex-president of the Federation. In addition, Telamazonas got a fine of US\$ 1,770,000, based on article 66 of LOC, for broadcasting *WWF RAW*, a wrestling program considered violent, on family schedule. In November 2015, Ecuavisa channel received penalties for discrimination, because of some comments expressed by members of the jury of *Ecuador Tiene Talento* reality show, referring a young participant who said she did not believe in God. Ecotel TV, located in Loja province, was impounded by Supercom, which took some equipment and closed the channel

based on the use of license payment delay. Finally, Manavisión, a regional channel, got a fine of US\$ 3,540,000 for exceeding advertising broadcast limits.

1.6. Information and Communication Technology (ICT) trends

According to Agency of Regulation and Control of Telecommunications (Arcotel, in Spanish), there are 27 digital terrestrial television (DTT) stations licensed for the private sector and five stations licensed for the public sector. There are 11,027,782 users of fixed internet, representing 67.74% of population, and 5,693,268 users of mobile internet, corresponding to 34.97%. These figures indicate that usage rate of internet in households is higher than mobile internet users.

Regarding fixed internet, Telecommunications National Corporation (CNT, in Spanish), a public company, has the highest participation rate in the market, with 54.46%, followed by TV Cable Group, with 13.29%, and Telconet, with 10.32%. Referring mobile internet, 58.9% of the population have contracts with Claro, a Mexican company; 31.85% of the population belong to Movistar, a Spanish company; and CNT catches 10.6% of the population, which means 4% more than 2014. Video on demand (VoD) has become more and more popular every day and, in Ecuador, the State company provides this service through CNT Play, whose main programs are national productions and South American soccer qualifying rounds.

1.7. Public TV

The program called *Educa. Televisión para Aprender* aims to broadcast educational contents, so it develops communication mechanics and produces educational programs with their corresponding methodologies. Besides, this program depends on the Ministry of Education and it has produced 54 TV series, nine national co-productions and six international co-productions targeted towards children, youngsters and family audience in three years since it was

created. It also mentions, as its main pillars, working with national and independent producers, high quality, focus on a good living and qualitative and quantitative research.⁷ The Ministry of Education affirms that 80% of the population knows about Educa, and 98% approve its contents positively. In addition, Educa broadcasts other programs produced by other Ministries, such as *Veó Veó*, which is produced by Mies and Ecuador TV, focused on infants “to motivate their initial stage through entertaining and educational contents”.⁸ Moreover, it wants to boost its web page, so that information would be available 24/7, differently from the TV station. Cordicom, in turn, has chosen audiovisual narrative to promote national and international culture by broadcasting two series: *Ranti Ranti* and *El Diván*.

1.8. Pay TV

In 2015, Arcotel registered 1,351,470 subscribers of pay TV, this is 31.55%. However, there was a growth slowdown compared to 2014, because it only increased 3.85%. There are approximately 5,135,586 users of pay TV, which represent about the third part of Ecuadorian population.

The main providers on pay TV are: Direct TV, company that leads the market with 33.91%; CNT, which has got 25.96%; and TV Cable Group, with 15.38%. Arcotel also informs that, in Ecuador, there are about 237 pay TV companies and six companies that offer satellite connection service; CNT is the only one that provides this service in Galapagos.

Remakes of series produced in the past or film adaptations made for TV and science fiction remark 2015 as a great year for pay TV productions, but science fiction definitely dominated ratings. On the other hand, VoD platforms keep producing their own contents to

⁷ <http://www.andes.info.ec/es/noticias/television-educa-cumple-tres-anos-divertir-e-instruir-ecuatorianos.html>

⁸ *Veó Veó* (2016, March 29th). Recovered on April 13th, 2016 from <http://mundoveveo.gob.ec/web/descubre-veoveo/>

launch new series or new seasons of series. Regarding Latin American fiction, television companies, especially Mexican ones, produce certain contents targeted towards Latin people living in the USA. Some successful Brazilian *telenovelas* are also rerun, like *Xica da Silva* (Rede Manchete), and some Mexican series, like *La Familia Peluche* (Televisa).

1.9. Independent producers

Despite the fact that the major work field of audiovisual producers is advertising, they keep working on projects seen on Educa program contents. Thanks to promotion of local films and their calls to national production, 44 independent producer companies that work on films have been identified in the country.

1.10. International trends

The production of on-line content is a tendency that is being consolidated by *youtubers*, who take advantage of social networks to promote their productions. Part of on-line production is original content made by VoD sites. Adding content to productions made by mayors and American TV stations is not enough; additionally, it is important to take into account productions related to the nations where they are broadcast. “Narco novelas”, for instance, had repercussion after the arrival of *Narcos*, a TV series presented on Netflix and whose cast is Latin American.

New transmission windows make possible to produce online. Through internet, people can watch programs that are broadcast in other countries and know about new TV production tendencies to produce or broadcast on open signal television.

In 2015, TV tendency in Ecuador is characterized by high participation of the government, and it is determined by regulations of law and the reform made on article 384 of the Constitution, which states that communication is a public service. A similar situation happened with the Organization of Control called Supertel, which penalized some audiovisual media. TV tendency is also determined

by the capacity LOC has to produce contents and broadcast them on private and public media, strengthening Ecuadorian independent producers. We can also observe how internet makes viewers pay attention to VoD systems and consume audiovisual contents; on this regard, Ecuadorian company CNT has decided to provide this product as a service. Finally, despite the punishing aspect of Supercom when it applies the law, media are observing and accepting regulations progressively.

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

Compared with 2014, broadcast fiction productions increased from 109 to 112. From this amount, 60 of them were considered premiere productions, 52 were reruns and 21 were Ecuadorian productions.

Table 1. Fiction broadcast in 2015 (national and foreign; premieres and reruns; and co-productions)

<p>PREMIERE NATIONAL TITLES – 8 Teleamazonas – 1 national title 1. <i>Escenas de Matrimonio</i> (series)</p> <p>Ecuador TV – 2 national titles 2. <i>Ciudad Quinde</i> – 2nd season (series) 3. <i>Euclides Vaca, Detective Investigador</i> (docufiction)</p> <p>Ecuavisa – 3 national titles 4. <i>3 Familias</i> (sitcom) 5. <i>Así Pasa</i> – 2nd season (sitcom) 6. <i>El Combo Amarillo</i> – 6th season (sitcom)</p> <p>TC Televisión – 2 national titles 7. <i>Estas Secretarías</i> – 4th season (sitcom) 8. <i>Los Hijos de Don Juan</i> (telenovela)</p> <p>PREMIERE FOREIGN TITLES – 52</p> <p>Gama TV – 8 titles 9. <i>Como Dice el Dicho</i> (series – Mexico)</p>	<p>Canal Uno – 1 title 60. <i>Escándalos</i> (docudrama – Venezuela/ USA/Mexico/ Panama)</p> <p>CO-PRODUCTIONS – 0</p> <p>RERUNS – 52</p> <p>Gama TV – 13 titles 1. <i>Café con Aroma de Mujer</i> (telenovela – Colombia) 2. <i>Como Dice el Dicho</i> – 1st season (series – Mexico) 3. <i>Como Dice el Dicho</i> – 2nd season (series – Mexico) 4. <i>Como Dice el Dicho</i> – 3rd season (series – Mexico) 5. <i>Como Dice el Dicho</i> – 4th season (series – Mexico) 6. <i>La Rosa de Guadalupe</i> – 1st season (series – Mexico) 7. <i>La Rosa de Guadalupe</i> – 2nd season (series – Mexico)</p>
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10. <i>Hasta el Fin del Mundo</i> (telenovela – Mexico)	8. <i>La Rosa de Guadalupe</i> – 3rd season (series – Mexico)
11. <i>La Malquerida</i> (telenovela – Mexico)	9. <i>La Rosa de Guadalupe</i> – 4th season (series – Mexico)
12. <i>La Sombra del Pasado</i> (telenovela – Mexico)	10. <i>María la del Barrio</i> (telenovela – Mexico)
13. <i>La Gata</i> (telenovela – Mexico)	11. <i>María Mercedes</i> (telenovela – Mexico)
14. <i>La Rosa de Guadalupe</i> – 5th season (telenovela – Mexico)	12. <i>Marimar</i> (telenovela – Mexico)
15. <i>Lo Imperdonable</i> (telenovela – Mexico)	13. <i>Pantanal</i> (telenovela – Brazil)
16. <i>Muchacha Italiana Viene a Casarse</i> (telenovela – Mexico)	Teleamazonas – 8 titles
Teleamazonas – 10 titles	14. <i>Aída</i> (series – Ecuador)
17. <i>Fugitivos</i> (series – Colombia)	15. <i>La Pareja Feliz</i> (sitcom – Ecuador)
18. <i>Tiro de Gracia</i> (series – Colombia)	16. <i>La Tremebunda Corte</i> (sitcom – Ecuador)
19. <i>Anónima</i> (telenovela – Colombia)	17. <i>Mujer, Casos de la Vida Real</i> – 1st season (series – México)
20. <i>El Laberinto</i> (telenovela – Colombia)	18. <i>Muje, Casos de la Vida Real</i> – 2nd season (series – México)
21. <i>Los Graduados</i> (telenovela – Colombia)	19. <i>Por Ella soy Eva</i> (telenovela – Mexico)
22. <i>Escenas de Matrimonio</i> (series – Spain)	20. <i>Rosario Tijeras</i> (telenovela – Colombia)
23. <i>De que te Quiero te Quiero</i> (telenovela – Mexico)	21. <i>Vivos</i> (Comedy – Ecuador)
24. <i>El Color de la Pasión</i> (telenovela – Mexico)	Ecuador TV – 1 title
25. <i>Mi Corazón es Tuyo</i> (telenovela – Mexico)	22. <i>Ciudad Quinde</i> (series – Ecuador)
26. <i>Qué Pobres tan Ricos</i> (telenovela – Mexico)	Ecuavisa – 10 titles
Ecuador TV – 7 titles	23. <i>Amor Sincero</i> (telenovela – Colombia)
27. <i>Dalila</i> (series – Brazil)	24. <i>Así Pasa</i> – 1st season (sitcom- Ecuador)
28. <i>Sansón y Dalila</i> (series – Brazil)	25. <i>El Combo Amarillo</i> – 3rd season (sitcom – Ecuador)
29. <i>Sueños de Egipto</i> (telenovela – Brazil)	26. <i>El Combo Amarillo</i> – 4th season (sitcom – Ecuador)
30. <i>Pulseras Rojas</i> (series – Spain)	27. <i>El Combo Amarillo</i> – 5th season (sitcom – Ecuador)
31. <i>Salvaje</i> (telenovela – Brazil)	28. <i>El Exitoso Lcdo. Cardoso</i> (telenovela – Ecuador)
32. <i>Ellas los Prefieren Maduros</i> (telenovela – Korea)	29. <i>La Mujer en el Espejo</i> (telenovela – Colombia)
33. <i>La Princesa y el General</i> (telenovela – Korea)	30. <i>Mi Pequeña Mamá</i> (telenovela – Colombia)
Ecuavisa – 14 titles	31. <i>Motivo</i> (telenovela – Spain)
34. <i>11-11 en mi Cuadra Nada</i> (telenovela – Argentina)	32. <i>Súper Papa</i> (telenovela – Ecuador)
35. <i>Encantadoras</i> (telenovela – Brazil)	TC Televisión – 12 titles
36. <i>Imperio</i> (telenovela – Brazil)	33. <i>Amarte así, Frijolito</i> (telenovela – USA)
37. <i>La Guerrera</i> (telenovela – Brazil)	34. <i>Ángel Rebelde</i> (telenovela – USA)
38. <i>La Sombra de Helena</i> (telenovela – Brazil)	35. <i>Ciudad Quinde</i> (series – Ecuador)

39. <i>Rastros de Mentiras</i> (telenovela – Brazil)	36. <i>El Gabinete</i> (sitcom – Ecuador)
40. <i>La Ronca de Oro</i> (telenovela – Colombia)	37. <i>El Garañón del Millón</i> (telenovela – Ecuador)
41. <i>Dueños del Paraíso</i> (telenovela – USA)	38. <i>Estas Secretarias</i> – 1st season (series – Ecuador)
42. <i>En Otra Piel</i> (telenovela – USA)	39. <i>Estas Secretarias</i> – 3rd season (series – Ecuador)
43. <i>Los Miserables</i> (telenovela – USA)	40. <i>Fanatikka</i> (telenovela – Ecuador)
44. <i>Reina de Corazones</i> (telenovela – USA)	41. <i>Kandela</i> (telenovela – Ecuador)
45. <i>Tierra de Honor</i> (telenovela – USA)	42. <i>La Hechicera</i> (telenovela – Ecuador)
46. <i>Las Mil y Una Noches</i> (telenovela – Turkey)	43. <i>Los Barriga</i> (telenovela – Ecuador/Peru)
47. <i>¿Qué Culpa Tiene Fatmagül?</i> (telenovela – Turkey)	44. <i>Violetta</i> (telenovela – Argentina)
TC Televisión – 8 titles	RTS – 2 titles
48. <i>Violetta</i> – 2nd season (telenovela – Argentina)	45. <i>A Cada Quien su Santo</i> (series – Mexico)
49. <i>Celia</i> (telenovela – Colombia)	46. <i>Lo que Callamos las Mujeres</i> (series – Mexico)
50. <i>La Suegra</i> (telenovela – Colombia)	Canal Uno – 6 titles
51. <i>Niche. Lo que Diga el Corazón</i> (telenovela – Colombia)	47. <i>Hasta que la Plata nos Separe</i> (telenovela – Colombia)
52. <i>Amor sin Reserva</i> (telenovela – Mexico)	48. <i>La Hija del Mariachi</i> (telenovela – Colombia)
53. <i>Amor Secreto</i> (telenovela – Venezuela)	49. <i>Los Compadritos</i> – 1st season (sitcom – Ecuador)
54. <i>Piel Salvaje</i> (telenovela – Venezuela)	50. <i>Los Compadritos</i> – 2nd season (comedy – Ecuador)
55. <i>Voltea pa' que te Enamores</i> (telenovela – Venezuela/USA)	51. <i>Pedro el Escamoso</i> (telenovela – Colombia)
RTS – 4 titles	52. <i>Yo soy Betty la Fea</i> (telenovela – Colombia)
56. <i>Hay Alguien Ahí</i> (series – Spain)	TOTAL PREMIERE TITLES: 60
57. <i>Corazón en Condominio</i> (telenovela – Mexico)	TOTAL RERUNS: 52
58. <i>La Mujer de Judas</i> (telenovela – Mexico)	TOTAL TITLES BROADCAST: 112
59. <i>Siempre Tuya Acapulco</i> (telenovela – Mexico)	

Source: Kantar Ibope Media. Elaborated by Obitel Ecuador.

Despite the great amount of national productions, considering TC reruns which reveal how much they have produced in recent years, new productions have decreased from ten to eight (four sitcoms, one docufiction, one *telenovela* and two series). Anyway, fiction productions contribution is still limited considering the legal quota national productions have to reach according to law (60%). Ibero-American productions reached a total of 48.

Table 2. Premiere fiction in 2015: countries of origin

Country	Titles	%	Chapters/ episodes	%	Hours	%
NATIONAL (total)	8	13.3	506	11.7	408:55:00	9.3
OBITEL COUNTRIES (total)	48	80.0	3374	78.0	4007:05:00	90.7
NON OBITEL COUNTRIES (total)	4	6.7	448	10.4	403:35:00	9.1
Argentina	2	3.3	84	1.9	106:35:00	2.4
Brazil	9	15.0	613	14.2	875:10:00	19.8
Chile	0	0.0	0	0.0	0:00:00	0.0
Colombia	9	15.0	363	8.4	321:05:00	7.3
Ecuador	8	13.3	506	11.7	409:30:00	9.3
Spain	3	5.0	68	1.6	73:35:00	1.7
USA (Hispanic production)	5	8.3	314	7.3	231:05:00	5.2
Mexico	16	26.7	1545	35.7	1993:15:00	45.1
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	4	6.7	387	8.9	406:20:00	9.2
TOTAL	56	93.3	3880	89.6	4416:00:00	100.0
National co-productions	0	0	0	0	0	0
Obitel countries co-productions	2	4.1	136	4.0	118:05:00	2.94

Source: Kantar Ibope Media. Elaborated by Obitel Ecuador.

For the first time, the public channel presented two national productions and broadcast, like Ecuavisa, foreign programs produced in countries that do not belong to Obitel: ECTV broadcast two South Korean *telenovelas* (*Ellas los Prefieren Maduros* and *La Princesa y el General*), and Ecuavisa broadcast two Turkish *telenovelas* (*Las Mil y Una Noches* and *¿Qué Culpa Tiene Fatmagül?*).

Considering country of origin, Mexico confirmed to be the leader as fiction productions exporter, with 16 productions. Ecuador is in third place in number of productions (eight), meanwhile Spain premiered three productions.

Table 3. Co-productions

	Titles	Co-producer countries	Producers
Ecuador + Obitel countries	-	-	-
		-	-
TOTAL TITLES CO-PRODUCED WITH OBITEL COUNTRIES: 0			
Ecuador + Non Obitel countries	-	-	-
		-	-
TOTAL TITLES CO-PRODUCED WITH NON OBITEL COUNTRIES: 0			
Other Obitel countries + Obitel countries	<i>Escándalos*</i>	Venezuela	Televen and Idea Estudios
		Mexico	Caalioppe Productions and Popcornbrain
		United States	Nirvana Films and Nitro Group
	<i>Voltea pa' que te Enamores</i>	Venezuela	Venevisión International Productions
		United States	Univision Studios
TOTAL TITLES CO-PRODUCED AMONG OBITEL COUNTRIES: 2			
Other Obitel countries + Non Obitel countries	-	-	-
		-	-
TOTAL TITLES CO-PRODUCED AMONG OBITEL AND NON OBITEL COUNTRIES: 0			
TOTAL CO-PRODUCTIONS: 2			

*Panama also participated, even though it is not part of Obitel.

Source: Kantar Ibope Media. Elaborated by Obitel Ecuador.

The 56 national and Ibero-American fiction productions reached 4,416 hours (Table 4), including advertising, which should not last more than 15 minutes per hour of programming according to Article 68 of General Regulation of LOC.

Out of 56 productions, a TV series (*Escándalos*) and a *telenovela* (*Voltea pa' que te Enamores*) were produced by Venezuela, Mexico, USA, and Panama. Ecuador did not have any co-productions; however, its eight new productions were broadcast on prime time.⁹

⁹ Timetables changed in Ecuador in 2014 and now they coincide with the different types of audience, according to what is established in LOC: family (6 a.m.-6 p.m.), shared responsibility (6 p.m.-10 p.m.) and adults (10 p.m.-6 a.m.).

Table 4. Chapters/episodes and hours broadcast by time slot

Time slot	National			Ibero-American			Total		
	C/E	%	H	C/E	%	H	C/E	%	H
Morning (06:00-12:59)	0	0.0	0:00:00	352	10.4	325:00:00	352	9.1	325:00:00
Afternoon (13:00-17:59)	0	0.0	0:00:00	1111	32.9	1575:15:00	1111	28.6	1574:45:00
Prime time (18:00-23:29)	506	100.0	408:55:00	1770	52.5	1964:45:00	2276	58.7	2373:40:00
Night (23:30-02:00)	0	0.0	0:00:00	141	4.2	142:05:00	141	3.6	142:05:00
Total	506	100.0	408:55:00	3374	100.0	4007:05:00	3880	100.0	4416:00:00

Source: Kantar Ibope Media. Elaborated by Obitel Ecuador.

Table 5. Formats of national and Ibero-American fiction

Format	National			Ibero-American					
	Titles	%	C/E	H	%	Titles	C/E	%	H
<i>Telenovela</i>	1	12.5	133	110:45:00	27.1	39	3137	93.0	3746:55:00
<i>Series</i>	2	25.0	54	27:35:00	6.7	8	206	6.1	222:40:00
<i>Miniseries</i>	0	0.0	0	0:00:00	0.0	0	0	0.0	0:00:00
<i>Telefilm</i>	0	0.0	0	0:00:00	0.0	0	0	0.0	0:00:00
<i>Unitario</i>	0	0.0	0	0:00:00	0.0	0	0	0.0	0:00:00
Docudrama	1	12.5	27	14:00:00	3.4	1	31	0.9	37:30:00
Others (soap opera, etc.)	4	50.0	292	256:35:00	62.7	0	0	0.0	0:00:00
Total	8	100.0	506	408:55:00	100.0	48	3374	100.0	4007:05:00

Source: Kantar Ibope Media. Elaborated by Obitel Ecuador.

Telenovelas led international productions category. The most produced format in Ecuador was sitcom. *Euclides Vaca*, *Detective Investigador*, a docudrama series, helped to diversify national fiction that focused on comedies again.

Table 6. Formats of national fiction per timeslot

Format	Morn- ing	%	After- noon	%	Prime time	%	Night	%	To- tal	%
<i>Telenovela</i>	0	0.0	0	0.0	1	12.5	0	0.0	1	12.5
Series	0	0.0	0	0.0	2	25.0	0	0.0	2	25.0
Miniseries	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Telefilm	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
<i>Unitario</i>	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Docudrama	0	0.0	0	0.0	1	12.5	0	0.0	1	12.5
Others (soap opera, etc.)	0	0.0	0	0.0	4	50.0	0	0.0	4	50.0
Total	0	0.0	0	0.0	8	100.0	0	0.0	8	100.0

Source: Kantar Ibope Media. Elaborated by Obitel Ecuador.

Euclides Vaca, *Detective Investigador* was considered a period production which contained historical events occurred in Ecuador. *El Quinde*, second season, was another period production. The other six productions were adapted to the present time.

Table 7. Time period in which fiction is set

Time period	Titles	%
Present	6	75.0
Period	1	12.5
Historical	1	12.5
Other	0	0.0
Total	8	100.0

Source: Kantar Ibope Media. Elaborated by Obitel Ecuador.

For three consecutive years, Ecuavisa has led the top ten list with eight productions, and two of them were their own productions: *Así Pasa* (sixth place) and *3 Familias* (eighth place). TC Televisión has two titles among the top ten: one of them was their own

production (*Los Hijos de Don Juan*, fourth place), which was also the only national production *telenovela* in 2015.

Table 8. The ten most watched titles: origin, rating, share

	Title	Country of original idea or script	Producer company (country)	Channel	Scriptwriter or author of original idea	Rating	Share
1	<i>Rastros de Mentiras</i>	Brazil	Globo	Ecuavisa	Walcyrr Carrasco	14.53	10.60
2	<i>La Guerrera</i>	Brazil	Globo	Ecuavisa	Glória Pérez	14.32	10.47
3	<i>En Otra Piel</i>	USA	Telemundo	Ecuavisa	Julio Jiménez	12.39	10.02
4	<i>Los Hijos de Don Juan</i>	Ecuador	TC Televisión	TC Televisión	Fabrizio Aveiga	10.35	7.79
5	<i>La Sombra de Helena</i>	Brazil	Globo	Ecuavisa	Manoel Carlos	10.05	7.37
6	<i>Así Pasa</i>	Ecuador	Ecuavisa	Ecuavisa	Jorge Luis Pérez	9.7	15.7
7	<i>Imperio</i>	Brazil	Globo	Ecuavisa	Aguinaldo Silva	9.37	7.38
8	<i>3 Familias</i>	Ecuador	Ecuavisa	Ecuavisa	Cristian Cortez	9.25	7.92
9	<i>Celia</i>	Colombia	Fox Telecolombia	TC Televisión	Andrés Salgado, Paúl Rodríguez	9.22	7.35
10	<i>La Ronca de Oro</i>	Colombia	CMO Producciones	Ecuavisa	Gerardo Pinzón, Andrés Guzmán	9.06	9.45
Total productions: 10				Foreign scripts: 7			
100%				70%			

Source: Kantar Ibope Media. Elaborated by Obitel Ecuador.

All top ten productions were broadcast at prime time.

Table 9. The ten most watched titles: format, length, time slot

	Title	Format	Genre	Number of chap./ep. (in 2015)	First and last transmission (in 2015)	Time slot
1	<i>Rastros de Mentiras</i>	Telenovela	Drama	23	01/02-02/09	Prime time
2	<i>La Guerrera</i>	Telenovela	Drama	115	02/10-06/20	Prime time
3	<i>En Otra Piel</i>	Telenovela	Drama	57	01/02-03/23	Prime time
4	<i>Los Hijos de Don Juan</i>	Series	Comedy	118	07/14-12/31	Prime time
5	<i>La Sombra de Helena</i>	Telenovela	Drama	75	07/21-12/31	Prime time
6	<i>Así Pasa</i>	Series	Comedy	104	01/02-12/30	Prime time
7	<i>Imperio</i>	Telenovela	Drama	65	07/29-12/31	Prime time
8	<i>3 Familias</i>	Series	Comedy	16	01/04-02/22	Prime time
9	<i>Celia</i>	Telenovela	Drama	26	11/23-12/31	Prime time
10	<i>La Ronca de Oro</i>	Telenovela	Drama	44	01/02-03/02	Prime time

Source: Kantar Ibope Media. Elaborated by Obitel Ecuador.

Referring social topics, male audience preferred productions that contained human trafficking or unwanted pregnancy; female audience preferred comedies.

Table 10. Themes in the ten most watched titles

	Title	Dominant themes	Social themes
1	<i>Rastros de Mentiras</i>	Economic arguments, family conflicts, revenge, betrayal and ambition.	Unplanned pregnancy, patriotic attitudes, medical ethics, taking care of patients in a coma.
2	<i>La Guerrera</i>	Economic conflicts, police matters, intrigue, strength to resist kidnapping.	Traffic of women and children, forced prostitution, adoption and betrayal, sexual tourism.
3	<i>En Otra Piel</i>	Mystery, love, revenge, murder and thirst for righteousness.	Socioeconomic and cultural differences, social discrimination and violence.

4	<i>Los Hijos de Don Juan</i>	Love issues, everyday problems and humorous economic issues.	Popular and middle class social environment, men and women stereotypes, solidarity.
5	<i>La Sombra de Helena</i>	Intense and complicated love, strong love bonds, legal issues.	Feelings of jealousy and guilt, betrayal, social differences, family conflicts.
6	<i>Así Pasa</i>	Relations and risible work anecdotes, everyday life of middle and lower class, relations between neighbors and interracial relations.	Labor relations, ethnic and regional idiosyncrasy, way of living in a condominium.
7	<i>Imperio</i>	Economic power and troubled family relations, fake marriage, ambition for power.	Forming economic power through illegal activities; rivalry and filial revenge, parricide.
8	<i>3 Familias</i>	Everyday life, different behaviors and trouble among social classes.	Socioeconomic and cultural differences and similarities.
9	<i>Celia</i>	Cuban singer Celia Cruz's biography, a story of persistence and success, fighting a terrible illness.	Social mobility through art, exile conflicts, social prejudice.
10	<i>La Ronca de Oro</i>	Biography of a popular singer who defeats social prejudice, a story of musical success.	Fighting social and gender prejudice, "love of art" triumphs.

Source: Kantar Ibope Media. Elaborated by Obitel Ecuador.

International fiction consumption was larger in the 18+ age group. Nevertheless, it is important to mention that two of the three national productions had more acceptance among children. It seems that humor catches the spectators.

Table 11. Audience profile of the ten most watched titles: gender, age, socioeconomic status

Title	Channel	Gender %		Socioeconomic status %		Age group %			
		Women	Men	AB	C*	3 to 11	12 to 17	18+	
1	<i>Rastros de Mentiras</i>	Ecuavisa	4.11	7.54	7.34		4.07	4.42	7.34
2	<i>La Guerrera</i>	Ecuavisa	4.04	7.26	6.78		4.46	4.05	6.78
3	<i>En Otra piel</i>	Ecuavisa	3.50	6.55	6.40		3.77	4.37	4.07
4	<i>Los Hijos de Don Juan</i>	TC Televisión	3.78	4.70	3.67		5.99	4.46	3.67

5	<i>La Sombra de Helena</i>	Ecuavisa	2.76	5.22	4.93		3.77	2.23	4.93
6	<i>Así Pasa</i>	Ecuavisa	3.86	2.81	2.76		5.85	4.61	2.76
7	<i>Imperio</i>	Ecuavisa	2.64	4.99	4.71		2.13	1.54	4.71
8	<i>3 Familias</i>	Ecuavisa	3.35	3.89	3.85		2.49	4.29	3.85
9	<i>Celia</i>	TC Televisión	3.13	4.34	3.23		5.13	4.93	3.23
10	<i>La Ronca de Oro</i>	Ecuavisa	2.30	4.87	4.23		2.54	3.19	4.23

* In 2015, Kantar Ibope did not measure status C, lower.

Source: Kantar Ibope Media. Elaborated by Obitel Ecuador.

In 2015, there was a decrease of national titles. Nonetheless, the public television as a producer released a series and an infotainment. In this way, it contributed to the diversification of the broadcast television formats, where *telenovela* has preeminence, and with Ecuavisa, they established a broadcasting area of productions of countries that are not part of Obitel. Besides, among 12 reruns, TC broadcast nine own productions of the last years. In the top ten, Ecuador has three titles that confirm humor is still the national indicator in fiction.

3. Transmedia reception

After five years since the Ecuadorian *telenovela* got into the top ten, another production of the same format from TC Televisión, *Los Hijos de Don Juan*, had the fourth place among the ten most watched programs in 2015. This *telenovela* with a rating of 10.35 got beyond the national series *Así Pasa* (sixth place) and *Tres Familias* (eighth place) from Ecuavisa. These two also got in the list of titles with great audience ratings.

The selection criteria of this *telenovela* as the case study for this transmedia analysis were based on these reasons. From the applied methodology in the Obitel Yearbook 2015 in this same section, the dynamics of this national production was reviewed on Facebook, Twitter and Instagram, which are part of the internet settings mentioned by Patricia Wallace (2001), where the agents of the informa-

tion and the users with a common interest get in contact and generate different scales of interactivity (Cruz, 2010). The group did not consider YouTube because there was not a specific account for this production; there was a general account for TC Televisión.

From those social networks, Facebook was validated even though the official account in Twitter had more publications (37,906) and supporters (155,311). Nonetheless, Twitter had only available information since February 5th, 2016, which did not allow the analysis. Besides, Instagram had 6,283 posts and 187 supporters, and the official account in Facebook¹⁰ had more publications (1,019) and supporters (24,379).¹¹ In addition, that Ecuadorian *telenovela* had 36 non-official accounts in this social network, which had fewer publications, supporters, comments and videos than the official account.

From May 27th, 50 days before the premiere of this national production, until April 20th, 2016, the chosen account had 73,703 likes and published 116 videos. In 2015, through this social network, 46 videos were spread, 2,054 photos were uploaded and 70 publications were written, which means there was transmedia interaction between the producers and the audience of *Los Hijos de Don Juan*. A cibergraphy was applied to that corpus, which is a methodology that allows the revision of the new practices related with the audience.

In the open options for these practices, the transmedia interaction was observed in: a) the design of the cover, and b) the biography and the albums. In both cases, the emphasis was in the images (photos and videos) and the possibility of sharing and rating them with a “like” or comments, even though in the design of the cover the posts were also considered.

At that level, it was shown that the administrators of the account promoted the interaction with the supporters of the Ecuadorian *telenovela* with pictures and videos, which were accompanied

¹⁰ <https://www.facebook.com/HijosDeDonJuan>

¹¹ That was the number of followers on April 20th, 2016.

by texts that gave more information of what was going to happen in the next episodes, and, in addition, they endorsed the activities that the actors had off the screen.¹² Besides, they promoted the use of hashtags in order to generate a sense of identification amongst the audience by tagging the name of the production or an important moment of the narrative (storytelling) – for example, #HueleASuegro, when they think that the teenager daughter of one of the main characters has a boyfriend – or also for the presentation of topics related with the sponsors of the program.

Nevertheless, on December 11th, 2015, the hashtag #JuntosEsPosible stood out on the official account that *Los Hijos de Don Juan* used in order to spread the videoconference that the Production Employment and Competitiveness ministry, Vinicio Alvarado, gave on November 26th, in the event “Ecuador, República de Oportunidades”.¹³ Since the audiovisual material was broadcast in six microvideos and reached 130 likes and 1.193 views, it is shown that the broadcasting entities managed by the government are channels that transmit governmental messages, and that the social networks on internet are also used to imprint political contents to the relations between producers and audience.

Regarding biography, the administrators of the official account of *Los Hijos de Don Juan* published 2,052 pictures distributed in four albums: biography, profile pictures, pictures uploaded through the mobile phone and Amelia’s birthday, who is the teenager daughter of one of the main characters. A similar interaction strategy was used with the audience in order to generate a sense of identification with the *telenovela*. Moreover, the strategy of expanding the narrative (storytelling) of the *telenovela* was also used, especially in the

¹² On October 28th, 2015, a video that promoted the presence of the cast of *Los Hijos de Don Juan* in a shopping center in Guayaquil was published. To take a picture with actors, it was necessary to purchase products from one of the sponsors. The audiovisual material was recovered on 16th April 2016 from <https://www.facebook.com/HijosDeDonJuan/videos/vb.1596199703997618/1649009398716648/?type=2&theater>.

¹³ Part of this audiovisual material is available on <https://www.facebook.com/HijosDeDonJuan/?fref=ts>.

love relationship between the characters Paco and Sammy to encourage more interest amongst the users. For example, the hashtag #DilePacoDile in Twitter was a mean to motivate the audience to give advice to that character about the best ways to declare his love.

Another strategy that was used was the permanent publication of pictures of the scenes of the television production, which reached a daily average of 9.4 of spread images. The most viewed album was the Biography, with 1.935 pictures; meanwhile 119 pictures were distributed in four other albums.

In order to analyze the participation of the users according to the content given by the administrators of the official account of *Los Hijos de Don Juan*, the comments of the 70 publications from the profile were categorized considering if the reactions were positive or negative to the post, the use of hypermedia information and the answers to other comments. From the 246 comments, 54 (22%) were critiques to some of the actors, three (1.2%) had hypermedia information, the other 189 had a positive reply and only one comment promoted the interaction among users.

To sum up, from the three national productions that were part of the top ten in 2015, *Los Hijos de Don Juan* was selected as a case of transmedia reception taking into account two parameters: the best rating amongst Ecuadorian titles and its format, which meant the return of a national *telenovela* to the list of the ten most watched productions. In its official Facebook account, a cibergraphy was carried out, which showed two strategies made by the producers in order to interact with the internet users: 1) through the publication of pictures and videos, the actors' activities out of the screen were promoted; and 2) the hashtags were used in order to create a sense of identification with the *telenovela* and its sponsors. The use of a hashtag to help the broadcast of the national authority videoconference stood out, which implies that the contents of the transmedia reception are being fulfilled by political issues in Ecuador.

4. Highlights of the year

Amongst its 12 reruns, for the first time TC Televisión broadcast nine own productions (Table 1). In the list containing the total titles broadcast in 2015, Ecuador is ranked in the fourth place, after Mexico, Brazil and Colombia (Table 2), even though the national productions were reduced in relation to 2014. Besides, in 2015 three aspects must be highlighted: 1) the presence of only two channels (Ecuavisa and TC Televisión) in the top ten list in prime time, and Ecuavisa dominating the list of favorite programs (eight out of ten); 2) the categorical implementation of the LOC and its regulations, and the increase of fines for violations; and 3) the amendment of article 384,¹⁴ that turns communication into public service.

In the top ten, Ecuavisa included six *telenovelas* and two sitcoms of its own production. From these *telenovelas*, four are Brazilian and two of them are ranked first. The sitcoms are two out of the three produced by this channel: *Así Pasa* and *3 Familias*, which was in second place the last year, but in 2015 it went down to eighth position. Besides, TC presented *Los Hijos de Don Juan*, the only *telenovela* produced in the year, and got a noticeable fourth place. This channel also positioned, in ninth place, the Colombian biographical *telenovela Celia*, based on the legendary Cuban singer Celia Cruz. Meanwhile, Ecuavisa positioned in the last place the *telenovela La Ronca de Oro*, about the life of another singer, but in this case a Colombian one (Table 8).

In 2014, Ecuavisa produced four fiction titles which were ranked among the ten favorite ones. Their formats were sitcom and suspense. In 2015, *Así Pasa* presented its second season from September 1st and got in the top ten, but *3 Familias* went down in the ratings. However, it is important to mention that, instead of having a second season of this sitcom, and on the contrary of the habit of changing the *telenovelas* into series, in 2016 this sitcom will be

¹⁴ El Telegrafo (2015, December 3) Proyecto de enmiendas a la Constitución de la República del Ecuador. *El Telegrafo*. Retrieved on April 20th, 2016 from http://www.eltelegrafo.com.ec/especiales/2015/Enmiendas_a_la_Constitucion/servicio-publico.html.

turned into *telenovela*, with nonstop episodes of 45 minutes, but preserving its humoristic nature.¹⁵

The positions of the top ten demonstrate that in fiction *telenovela* is the main format and that the foreign ones occupy most of the positions. This information is of great importance if it is considered that the LOC (2013) determines that the Ecuadorian audiovisual media will assign at least 60% of its list of programs to national productions, which is not the real situation concerning fiction.

On the other hand, Ecuavisa paved the way in 2015 by broadcasting in prime time two Turkish *telenovelas*. However, as they are not part of Obitel, these productions do not appear on the top ten list, but they were some of the most watched. For example, *Las Mil y Una Noches* (from March to November) obtained 14 points, which would rank on the third place. Also, *Fatmagül*, that was released in November, obtained 10.6 points, more than the fourth position that had the Ecuadorian *telenovela Los Hijos de Don Juan*. From that point on, as in other Latin American countries that preceded the Ecuadorian broadcast, the Turkish fiction caught quickly their attention probably because, as it was mentioned before, they showed different culture and raised awareness of many women's situation. The commotion caused by these productions was documented in an article of the newspaper *El Universo*, which confirmed that, in the places where they were broadcast, they really represented a strong competition with local productions during prime time.¹⁶

Regarding the LOC (2013) and its compliance, the director of the Superintendence of Communications, Carlos Ochoa, during an event to commemorate two years of the proclamation of this regulation (October 15th, 2015), stated: "It is better to have a regulation which stands behind the right to everyone than having no regulation

¹⁵At the time of writing this report, the referred telenovela had already been released, on April 4th, 2016, with more characters and other locations. Retrieved on April 21st, 2016 from https://es.wikipedia.org/wiki/3_Familias.

¹⁶ *El Universo* (2015, November 14). Sherezade y Onur, pioneros de novelas turcas en Latinoamérica. *El Universo*. Retrieved on April 18th, 2016 from <http://www.eluniverso.com/vida-estilo/2015/11/14/nota/5237613/sherezade-onur-pioneros-latinoamerica>.

and allow the media to ‘self-regulate’. That is a fallacy. There is no power in the world that can self-regulate”.¹⁷

However, as in 2014 when the sitcom *La Pareja Feliz*, from Teleamazonas, was taken out of live broadcast because of gender discrimination and sexual minorities, in 2015 Supercom penalized another humor series, *Vivos*, under the same direction, David Reinoso, which was on air for ten years. Because of it and a new lawsuit of a citizen that felt that he was deceived and discriminated by this taste of humor, the channel decided not to have a new season. The digital portal *La República* (January 15th, 2015) communicated that it was also cancelled because “it supposedly attempted against the sexual minorities or it discredited women”.¹⁸

Furthermore, based on article 62 of LOC, which bans discrimination, Supercom asked the channel to offer a public apology to the affected person.¹⁹ Nevertheless, the TV channel decided to fulfill the resolution and not to put themselves at risk to receive new lawsuits and fines because of the mocking characteristics of the sitcom.

Based on the same article, Supercom demanded Canal Uno, on May 6th, to apologize publicly to the Afro-Ecuadorian population because an episode of the series *Los Compadritos* broadcast on January 10th was considered discriminatory.²⁰ But in this case, the channel decided to support the continuance of the sitcom.

¹⁷ Supercom (2015, Octubre 15). Supercom: un nuevo año de retos, propuestas y reformas. *Supercom*. Retrieved on April 18th, 2016 from <http://www.supercom.gob.ec/es/sala-de-prensa/noticias/562-supercom-aniversario-comunicacion-quito-reconocimiento-sesion-premios-ecuador-comunicacionincluyente>.

¹⁸ La República (2015, January 15). Teleamazonas suspende nueva temporada de *Vivos* antes de estrenarla. *La República*. Retrieved on April 18th, 2016 from <http://www.larepublica.ec/blog/entretenimiento/2015/01/15/teleamazonas-suspende-temporada-vivos-estrenarla/>.

¹⁹ El Comercio (2015, January 16). Supercom sanciona a “Vivos” y Teleamazonas por discriminación. *Trade*. Retrieved on April 18th, 2016 from <http://www.elcomercio.com/tendencias/sancion-supercom-vivos-teleamazonas-juliocesarayala.html>.

²⁰ Fundamedios (2015, May 12). Canal es sancionado por contenido discriminatorio. *Fundamedios*. Retrieved on April 19th, 2016 from <http://www.fundamedios.org/alertas/canal-es-sancionado-por-contenido-discriminatorio/>.

At the end of 2015, with the constitutional amendments approved by the National Assembly on December 3rd, the communication had two positions that seem contradictory. The members of the Assembly that are part of the government say that the media exerts power and that it is necessary to establish guarantees by regulations which guide their actions. According to the verdict of the Constitutional Court and the information published by *El Comercio* (November 30th, 2015), the communication has “double dimensionality”, which means rights and public service. But if it is considered as a service, it should be implemented and demanded through public policies and public, private and community media.

For Cesar Montufar, president of the political movement Concertación, in the same note cited, this amendment is a “serious setback” because it gives the government “the legal authority of deciding the conditions and even the content that the communication can exert. This fact contradicts in an explicit way the fundamental right in which the government cannot establish in anyway the parameters or conditions in order to carry it out”.²¹

The communication as a right and a public service at the same time, more than the possibility of the citizenship to demand the fulfillment and the guarantees of the government and the respect of the media to their rights, appears as an opportunity for the government to control all the contents that are broadcast in the private communication media, in particular.

In 2015, the applied sanctions stand out because of the explicit violation of LOC in the national programming. Furthermore, in 2016 the consequences from these sanctions could be verified by the limited fiction production in the country taking into account the constitutional amendment which refers to the communication as a public service. According to *Plan V* in 2014, it legitimates “the state property over the information” when “the government appoints to

²¹ El Comercio (2015, November 30). La comunicación, de derecho a servicio público. *El Comercio*. Retrieved on April 18th, 2016 from <http://www.elcomercio.com/actualidad/comunicacion-derecho-serviciopublico-enmiendas-asamblea.html>.

whom, how and when to communicate”.²² But, the presence of Ecuavisa remains in the top ten, with two of its three productions, as well as the only national *telenovela* of the year, which is from TC.

5. Theme of the year: (re)invention of TV fiction genres and formats

In 2010, when Ecuador joined Obitel, a *telenovela* from Ecuavisa caught the attention of the audience in prime time, during the triple A segment (8:45 p.m.-9:45 p.m.). *Rosita la Taxista* had as the leading role an indigenous person, whose characteristics did not identify her as such. She was fair-skinned and had European features. In the development of the storyline, it was known that she was adopted and that her mother was an indigenous from the Highlands (Sierra Region) married to a mestizo from the Coast Region. They lived in a medium-low class neighborhood of Guayaquil. This characteristic already referred to the ethnic and cultural diversity which described not only the country but also the city of Guayaquil. This distinctive feature has pretended to be represented in the *telenovelas* and series in the last decade.

Nevertheless, what stood out in the character of Rosita was the type of occupation that she had. She was as a taxi driver for a taxi enterprise called *El Combo Amarillo*. She was the only woman performing in this work environment and one of the few women that drove a taxi in the city, so this was an incomparable character in this profession that takes place in the urban sector. In this way, the place of work, the taxi enterprise, was an important stage of the *telenovela*, which reached a rating of 14.1 and occupied the ninth place of the top ten list in 2010.²³

However, this fiction did not reach the high levels of audience like the other two first series, *El Cholito* (2007), which had a sur-

²² Plan V (2014, December 16). Servicio público: la jaula para la prensa del Ecuador. *Plan V*. Recovered on April 22nd, 2016 from <http://www.planv.com.ec/historias/sociedad/servicio-publico-la-jaula-la-prensa-del-ecuador>.

²³ Ayala, A., Herrera, C. et al. (2011:281). Data on fictions have been exposed in the Obitel Yearbooks from 2011 to 2015 and in the yet unpublished Yearbook 2016.

prisingly high rating of 25.2²⁴, and *El Secreto de Toño Palomino* (2008)²⁵, produced by Ecuavisa with its headquarters in Guayaquil. It is important to mention that Ecuavisa and TC Televisión compete not only for the national first levels of audience in their programming but also in the national fiction production. Ecuavisa, founded in 1967, began with “teleteatro”, whose episodes were broadcast live. Then, after almost two decades, the production of *telenovelas* began, but they were not produced with frequency.²⁶

The levels of audience were an incentive in order to get more viewers, since this had a direct relation with the aim of not losing advertisers.²⁷ In this way, Ecuavisa tried to continue *El Cholito* with another fiction, *Mostro de Amor*, but the channel and the leading actor, creator of the idea and the principal character, David Reinoso, had discrepancies, and they finished with their working relationship. In 2010, the next fiction was broadcast by Teleamazonas, but with lower rating. Besides, *Toño Palomino* under the same producer and most of the same actors, except for the leading characters, continued in 2009, but under a different format. It was a humor series called *La Panadería*, with a weekly broadcast. Its principal location was the *Panadería Izurieta*, where Toño Palomino’s daily activities took place. The “continuity of the *telenovela*”, as an on-line magazine ²⁸ referred to, was definitely because of its great success.

²⁴ Retrieved on April 23rd, 2016 from https://es.wikipedia.org/wiki/El_Cholito.

²⁵ Retrieved on April 23rd, 2016 from https://es.wikipedia.org/wiki/El_Secreto_de_To%C3%B1o_Palomino.

²⁶ Ayala, A., Herrera, C. et al. (2011:268); Ayala, A., Herrera, C. et al. (2013:271-276).

²⁷ “The idea of a weekly broadcast of fiction with recognizable characters is only one answer to a trading system based on advertisers; without this business model”, says Anderson, “the chains could experiment with new format, a broadcast program, a limited number of series, or alternatives to continuing series”. Anderson, C. (2005). Television networks and the use of drama, quoted by Piñón, J. et al. (2016). *(Re)invención de los géneros y formatos de ficción en la televisión*. Working paper for the Obitel Yearbook 2016.

²⁸ Ecuamagazine (2009, April 4th). *La Panadería en Ecuavisa*. *Ecuamagazine*. Retrieved on April 22nd, 2016 from <http://www.ecuamagazine.com/hoy-se-estrena-la-panaderia-en-ecuavisa>.

Furthermore, with these precedents and the high rating levels – which at the same time determined the interest of the channels to keep the audience and advertisers or to make changes in the productions –, Ecuavisa decided to continue with *Rosita*. Taking advantage of the humor of the situations and the performance of some of the characters as the central location of the storyline, around which the principal activity of the leading character was developed along with other supporting actors, they decided to create *El Combo Amarillo*. In this way, in 2011, a new comic series was produced; a sitcom that, as in *La Panadería*, used the humor as the main objective in the central concept of the plot, as the fundamental element for the creation of new characters and situations, but mainly to encourage the change from one format to another: from *telenovela* to sitcom.

In addition, the character Rosita disappeared from the storytelling, as well as Toño Palomino. Then, another leading character appeared: a taxi driver whose principal characteristic in the *telenovela* was to think that he was handsome and a Casanova. It was favorable to exaggerate some characteristics in the acting, even on the speech. Marcelo Guamán is from the highlands (Sierra region) and his accent identifies him. He uses some expressions in Quichua and mixes them with other colloquial ones among other slangs from Guayaquil. He is a Casanova, but he also falls in love. His character is an expression of the regional and intercultural diversity. He is a character created in the border of silliness and exaggeration, temperance and moderation, hectoring and strength, fear and weakness, male chauvinism and control, tenderness and obedience. All these characteristics turned Guamán into an amusing and trustworthy character. He expresses the ambiguity that characterizes many people. Besides, his character appearance is expressed in his way of dressing, his hairstyle and even his way of walking. He goes between the modern and the humorous style.

The other characters are also laughable, but not cartoonished. They are based on the stereotype, but had different personality traits and become more real. Don Day, a taxi driver and Guamán's

friend, is a rapper. He comes from a marginal urban area, but he is a good and naive person; however, he is not a fool. The owner of the taxi company – Mi Gordo, nicknamed used by Don Day to refer to the boss – assumes his character, but he treats his employees as sons. His wife, Estrellita Vespertina, is a frustrated *tecnocumbiera* (a combination of music styles) singer that controls the place and administrates her husband’s money, but sometimes she can also be more generous than her husband. Selva is the secretary of the company. She has blond hair and is curvy, not that intelligent, but sometimes she has liveliness. These are the main five characters of the six seasons, even though every year they include new characters, who are not always what they were expected to be, so they have to face difficult situations that allude not only to personal problems but also to the company’s problems. The themes approached in the sitcom refer to the characteristics of the city, the neighborhood insecurity, some fairytales, suspense, or other topics, as spaceships and aliens that were shown in the fifth season (2014).

As opposed to what happened in *El Cholito*, a character that was based on a *Guayaquileño* journalist that was cartoonised and mocked, also because of his ethnic background²⁹, the characters from *El Combo...* are stereotypic, but trustworthy and not offensive. Jonathan Estrada, who performs the character Marcelo Guamán, said that “*El Combo* changed the leading humor style that the television had had during the last decade. In this way, it kept distance from the racism and the regionalism. Our humor is absurd, with its slyness as any comedy, but trying not to be too obvious. That fact let us reach the children, something that we had never imagined”.³⁰

²⁹ The real journalist is José Delgado, which currently produces and hosts a program on Canal Uno called *En Carne Propia*. The character was created more ten years ago as part of the program *Vivos*, which was broadcast in different stages by several TV stations (Canal Uno, TC, Ecuavisa and Teleamazonas, when, in 2014, was taken out of air).

³⁰ El Comercio (2015, December 28). La televisión replantea su programación. *El Comercio*. Retrieved on April 22nd, 2016 from <http://www.elcomercio.com/tendencias/television-programacion-produccion-comedia-humor.html>.

As it was stated before, even though they are not “too obvious”, this sitcom has boys and girls as their favorite audience. Children are not defined as the main target for the sitcom, but its laughable characters attract their attention. In the *Obitel Yearbook 2013*, for example, it is pointed out that the two seasons of *El Combo...* reached a rating audience of 6.3 in each season in the age group 3-11, which was the majority in relation to women and men, young people and adults (p. 261). In 2014, the sitcom obtained the eighth place in the top ten mainly because of a rating of 24.7 given by this audience, which also formed the highest level of preference by age group reached among fictions (*Obitel, 2014:259*).³¹

From what is stated, it could be said that one characteristic from the change of one format to another, or from a *telenovela* to a humor series: some characters stand out, even the supporting actors in the original fiction, who were built up amusingly within their stereotype. They were parodic, easily cartoonized and with possibilities of making the public laugh (there was not the continuous joke with sexual connotation, or the rude taunt of the homosexual person); these characters also made their actors show their histrionic abilities.

On the other hand, in the endless dispute for the rating between Ecuavisa and TC Televisión, which during ten years had the popular sitcom *Mi Recinto* on the top ten, they wanted to present a product that would make the audience laugh, even though it had another storytelling concept in the scenario of the actions. If one of the sitcoms wanted to show rural scenarios and expected to express the idiosyncrasy of the farmer of the Coast Region (known as the Montubio Village), the other one had to be produced mainly in an urban scenario, with characters that represent the diversity of a medium low class. This sitcom takes place in the cities and preserves its cultural and idiosyncratic aspects from marginal urban areas; and at

³¹ Retrieved on April 22nd, 2016 from <http://obitel.net/wp-content/uploads/2015/07/obitel2014-portugues.pdf>.

the same time, it adopts or wants to adopt different behaviors and characteristics from high socioeconomic levels.

In the *Obitel Yearbook 2012*, the report about Ecuador said that *El Combo Amarillo* is the second case of “transformatization” (humor that responds to cultural local aspects and that is successful) in Ecuavisa; that is, the implementation of a new format, the sitcom, which does not allow leaving completely the original format of the *telenovela*. They also stated some of the aspects that were aforementioned as the determiners of the change of format. It mainly took advantage of humor that, at that time, was considered by the producer of *El Cholito* as the “success formula”. For David Reinoso, the main objective was to make the audience laugh; it could be with a cheap joke, a joke about allusions and sexual connotations, stereotyped characters based on discriminatory and prejudiced concepts, and gags that were similar to the American comedies for television and movie (*Obitel, 2012:291-292*).

In 2011, even though Ecuavisa’s sitcom registered higher points in the rating, it just only grazed the top ten. Meanwhile, in the broadcast of the second and third seasons in 2012, which was the year of higher levels of audience, it got second and third places among the ten favorite fictions in the year, with 13 and 12.9 points respectively. Nevertheless, in 2013, it went down to the last place, with a rating of 10.7. Besides, in 2014, it went up again to the eighth place, with 9.8; and in 2015, it released the sixth and last season³², which did not get in the top ten, with a rating of 7.9. However, in the daily broadcast from Monday to Friday (7 p.m.-7:30 p.m.) and on Saturdays and Sundays at night schedule (10 p.m.-11 p.m.), with episodes from previous seasons, the levels of audience varied between 3.8 and 8.22.³³ Furthermore, the presence of the sitcom in the so-

³² The end of *El Combo Amarillo* was announced by Ecuavisa in March 2016 as well as another sitcom, *Así Pasa*, which between 2014 and 2015 was broadcast in prime time after the first (7 p.m.-7:30 p.m. and 7:30 p.m.-8 p.m., respectively) and also achieved high ratings. The withdrawal was due to the start of a new fiction project, the *telenovela 3 Familias*, which was also a sitcom, premiered and broadcast in 2014.

³³ These figures were released by Kantar Media Ibope to *Obitel Ecuador* team.

cial networks reached important levels, mainly on Facebook, as it is specified in the Obitel Yearbook 2015 (p. 255), where a remarkable level of interaction among users of this social network took place.

Nonetheless, and for some causes which depend on economic reasons of the channel that produces and broadcasts (lower costs of production and management of advertisers), which have an impact on the change of format, or “transformatization”, as it is called in the Yearbook 2012, but mainly on the gaining of audiences in a particular political context, determined by the announcement of LOC (2013) and its regulations (2014), which force the permanent observation of the contents regarding to any kind of discrimination, *El Combo Amarillo* is an example of this fiction genre transformation in the country. However, more than the technical transformations of the production, more than the changes in the syntax of the storytelling and the esthetic, in the format or in the length of the episodes, the changes are in the way the sitcom approaches to humor and on the creation of the characters and their speech, which indeed “kept a distance from the racism and the regionalism”, according to the cited words of actor Estrada.³⁴

The sitcom develops a thematic narrative and discursive strategy in which the sense of society comes from the work environment, which is the place where the social relationships are well conveyed. These are the hierarchical or horizontal, troublesome and harmonious, distant and close relationships. The characters from *El Combo* not only respect the boss, but also tell him what they think in a clear and direct way. They also try to avoid hierarchies when they address to different people (for example, Don Day addresses his boss as “mi Gordo”). They also try to make the daily work environment the per-

³⁴ Videos of the six seasons are available at the following URLs:

- 1) Escuela de manejo: <https://www.youtube.com/watch?v=ZMWVDgMHZ3w>.
- 2) La premilitar ½: <https://www.youtube.com/watch?v=hCJqbFhg8g8>.
- 3) Huasipichai: https://www.youtube.com/watch?v=_SEEnpL1jU8.
- 4) Un piloso llega al Combo: <https://www.youtube.com/watch?v=vhb95R48jPw>.
- 5) <http://www.ecuavisa.com/articulo/entretenimiento/produccion-tv/59860-combo-amarillo-tendra-que-competer-su-nueva-temporada>
- 6) El verdadero Don Day: <https://www.youtube.com/watch?v=WsO-LbQPzk8>.

fect time to solve any small or big conflicts, but without idealizing it. There is no manichean approach of the characters or situations. In this way, by changing the content and the speech, more than the format, the sitcom fulfills what is stated by LOC and its regulations

Meanwhile, other television channels, as it was stated in the previous pages, have received suspensions and had to eliminate other humor series from their programming because of their discriminatory contents regarding gender or ethnic group. Ecuavisa has not incurred in any violation that have led to fines or public apologies. In other words, the change of format of one television fiction in Ecuador is also linked to the new legal regulations for the communication media and contents to which the channels have to adjust.³⁵

To sum up, the (re)invention of the fiction genres and formats in Ecuador have recently taken place in two sitcoms produced by Ecuavisa, created from two *telenovelas* that, at the appropriate time, had high ratings: in 2009, *La Panadería*, which was first known as *El Secreto de Toño Palomino* (2008), and, in 2011, *El Combo Amarillo*, which is the continuity of *Rosita la Taxista* (2011). This fact, as well as the economic one, regarding maintaining the advertisements and lowering the costs of production, have been really important in order to determine the “transformatization”, as it was named in 2012. An example is *El Combo...*, which, with its six seasons (2011-2015), triggered changes in the narrative and discursive strategy, related mainly to the concept of humor, the creation of less stereotyped characters, less manichean and more trustworthy characters. It is a challenge to the creativity and the use of the spoken language that, without a doubt, is also determined by the fulfillment of LOC and its regulations.

³⁵ In April 2016, while this report was being prepared, Ecuavisa released a *telenovela* from another sitcom that was in the top ten in 2014, *3 Familias*. This time, a change in reverse occurred, which suggests the possibility of continuous changes of formats, depending on the levels of rating, but also to get more possibilities to the plot and story. Today the *telenovela* is promoted with the slogan “no to discrimination in Ecuador”. These are families which represent three socioeconomic sectors, whose lives pass in parallel and yet convergent.

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MEXICO: RECONFIGURATION OF THE TELECOMMUNICATIONS MARKET

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1. Mexico's audiovisual context in 2015

The year 2015 was a significant period for Mexico on the subject of telecommunications because the “analog blackout” finished all over the country. The above presupposes not only its entrance into the global telecommunications market – framed by technological-digital convergence – but also an opening up of the Mexican radio electric spectrum for the incorporation of new radio and TV signals that would finally allow to comply with the notions of media democratization reflected in the Federal Telecommunications and Broadcasting Act, valid since 2014.

However, beyond the hopeful speeches surrounding the digitalization of radio and television signals, there are still monopolistic practices in Mexico because to date neither Televisa nor América Móvil have complied with their disintegration and they continue to be the prevailing economic agents that dominate radio broadcasting and telecommunications in the country.

In this framework, the Federal Institute of Telecommunications (IFT, in Spanish) granted the concession to Grupo Imagen Multimedia to operate a new open digital television network. This group was already operating in the Mexico City Metropolitan area with

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

channel 28 (called Cadenatres). Once this network is operational, for the first time in its history, Mexico will have four national open television networks, one public and three private ones, although they could well be four private networks. The fourth network would have resulted from the concession that had been granted to Grupo Radio Centro, which unfortunately had to be cancelled, because the company could not come up with the capital that the IFT required to operate the television network.

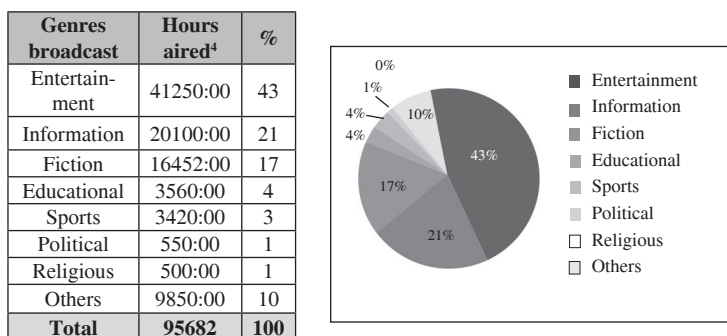
Channel 28 stopped broadcasting its usual fiction and entertainment contents to yield its space to Excélsior TV, the TV branch of one of the oldest newspapers in the country, which is now also part of Grupo Imagen Multimedia. The group announced that, when obtaining the third national open television network, production of a new narrative and visual fiction proposal will be among its major trumps before the Mexican audience. The same was expected regarding its informative proposal; however, it has announced that its official anchor in the news area will be *Ciro Gómez Leyva*, a journalist who, in the last few years, has been linked to news projects by Televisa and Radio Fórmula, both pro-government media.

1.1. Open television in Mexico

Chart 1. National open television networks in Mexico

PRIVATE NETWORKS (5)	PUBLIC NETWORKS (2)
Televisa (Canal 2, Canal 5 and Canal 9)	Once TV (Canal Once)
TV Azteca (Canal 7 and Canal 13)	Conaculta (Canal 22)
TOTAL NETWORKS = 8	

When Cadenatres stopped broadcasting, Mexico lost one national network and there remained only five private and two public channels, and the balance between public and private networks was also lost. The first broadcasts by the channels granted to Grupo Imagen Multimedia can be viewed in the country at the end of 2016 or beginning of 2017.

Graph 2. Offers by genre in TV programming^{2,3}

Information to generate the graph: Obitel Mexico

Among the genres broadcast by open national television, entertainment shows dominated the program grill, occupying 43% of all the hours available. The second genre in terms of importance was the news, with 21%, while in 2015 fiction (*telenovelas* and series) represented 17% of all the shows aired in Mexico, one point higher than in 2014. Cinema, which is also fiction, is included in the entertainment genre, which occupies 43% of the programming.

1.2. Audience trends in 2015

With the coming into force of the Federal Telecommunications and Broadcasting Act, the telecommunications market in Mexico was reconfigured in such a way that the companies do not only dominate one sector but also are present now in all the services. This has meant – in part – that some of their traditional businesses have decreased financially; however, this does not mean the end of

² Graphs 1 and 2 were not made this year due to lack of information.

³ Copyright © Ibope AGB Mexico, S.A. de C.V. Boulevard Manuel Ávila Camacho 191, 5th floor, Polanco I Sección, Miguel Hidalgo, 11510, Mexico City, 2015. The present page contains materials that are industrial and intellectual property of Ibope AGB Mexico, S.A. de C.V., which have been placed at the disposal of Obitel for research and analysis purposes connected with this project, therefore it is forbidden to reproduce them by third parties, whether temporarily, totally or partially, without written permission by this company. Infringement shall be punished as established by the relevant laws.

⁴ The data about the air times were generated exclusively by Obitel Mexico.

TV companies such as Televisa or TV Azteca, as it was pointed out repeatedly in the press or social networks. Quite the contrary, the global world of telecommunications is in a process of readjustment where companies are expanding their business networks to other sectors. These tendencies are presented below confirming what Obitel Mexico team has been remarking since 2011: television has been decreasing its advertising profits slightly, but the companies that manage them are recovering their capital through other telecommunications media, such as internet, telephony and digital TV.

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

In 2015, the reconfiguration of the Mexican advertising market is reaffirmed. For the first time in history, advertising investment in open television has been decreasing for the last ten years. In 2005, investment in this medium accounted for 59% of the total, while in 2015 it reached just 49%. These figures are even more baffling if we consider that total investment in advertising has grown steadily since 2013, when 4.5 billion dollars were invested, while 5.3 billion were invested in 2015. There is no crisis in advertising investment, despite the high volatility of the world's financial environment; rather, we are witnessing the reorganization of the advertisers' preferences, who have decided to invest a little less in open television in exchange for strengthening steadily their interest in paid television and, above all, in the internet.

This tendency is not homogeneous and affects television networks in a differentiated manner. For example, Televisa admitted that in 2015 annual sales in terms of advertising dropped 9.6% in respect of the previous year. However, these negative figures were broadly compensated by the 44.7% increase in the telecommunications segment, which includes the services of video, voice and data provided by subsidiary companies Cablevisión, Cablemás, TVI, Cablecom and Telecable. During 2015, Televisa experienced a solid growth in terms of channel sales, accounting for 26% and 17.7% regarding programming sale and licensing. This company continued

to produce and broadcast in Mexico several of the leading paid television channels in key categories, including general entertainment, music, life style and movies. Ten of the 30 paid television channels with the greatest ratings in Mexico were produced by Televisa. The good financial results were reflected also on satellite television, since it registered an increase in its subscribers' base amounting to 9%. The year 2015 was good for Televisa, since its annual net sales rose almost 10% in respect of the previous year. This means that Televisa's financial engineering has managed to absorb the relative low advertising income in open television, thanks to the dynamism observed in the paid television segments, both the cable and satellite ones, as well as the internet and programming sale services.

TV Azteca has felt more strongly the reorganization of advertising investment. During the fourth quarter of 2015, the company announced that it had suffered a net loss of 511 million pesos (30 million dollars), in addition to a sustained low of advertising income since 2011. The bad financial results shook the company up. On October 1st, 2015 the Board of Directors appointed Benjamín Salinas Sada as CEO of TV Azteca, replacing Mario San Román. Two months later TV Azteca announced that Esteban Galíndez Aguirre had been appointed as CFO of the company, replacing Carlos Hesses. The changes are part of a strategy seeking to "offer competitive, innovative contents, so as to win over even greater audiences at prime time, where the largest proportion of advertising income concentrates" (TV Azteca, 2016:4). TV Azteca wants to recover the capacity for producing contents that would allow it to attract once again the lost audience. According to statements by its executives, the company is willing "to produce original materials, co-produce programs and form strategic alliances with independent producers and scriptwriters to generate avant-garde formats with solid efficiency criteria, which would appeal to a growing number of viewers" (TV Azteca, 2016:4). Finally TV Azteca admits that the vertical, rigid, autarchic model of production, which governed for years, is completely exhausted. A flexible model of production, with in-

dependent companies with whom to share risks, seems to be the only way out for the creativity crisis that has placed TV Azteca in a financial quagmire.

1.4. Merchandising and social merchandising

The imminent need the TV networks have to communicate to their audiences that “the analog blackout” was about to be fulfilled generated several social merchandising campaigns within several *telenovelas*, both by Televisa and by TV Azteca. In their plots characters spoke of the importance of buying digital TV sets or signal decoders so as not to miss their favorite *telenovelas* or shows.

The blackout occurred on December 31st, 2015, so the *telenovelas* incorporated this topic since October that year. *Antes Muerta que Lichita* (Televisa) was one of the most outstanding examples, creating a series of podcasts on the topic on its website.⁵

1.5. Communication policies

The transition to digital terrestrial television meant mending at least ten years of backwardness in the country’s analog blackout. After the Federal Telecommunications and Broadcasting Act came into force, the current Mexican government betted on the telecommunications market as one of its key sectors for investment and development in the country.

According to the Telecommunications Rights Institute (Idet, in Spanish), Mexico increased its telecommunications investment 22% due to the 9 billion dollars injected by AT&T América Móvil in the sector. The US company invested significant amounts after acquiring cellphone company Iusacell, while América Móvil decided to bid strongly in the sector when it found out that the US company will vie with them for the market.

After the first year has elapsed since the Telecommunications Reform, the main advances can be summarized as follows:

⁵ See material at <http://television.televisa.com/telenovelas/antes-muerta-que-lichita/tutoriales/2016-01-15/amql-aprendiendoconelsa-apagon-analogico/>.

- **Reduction of prices.** International long distance prices for the consumer were cut in 40.7%, cellphone services in 15% and local telephone services in 4.5%.
- **Conditions for the users.** Cellphone users can now check their prepaid credit free of charge and preserve its validity for a whole year; they were also benefitted by the fact that mobile connection (roaming) does not have an additional cost.
- **Greater penetration of wireless broadband.** According to IFT, in 2015 the level of wireless broadband penetration doubled and it went from 23 to 43 subscribers per 100 inhabitants.
- **Trunk network.** In January 2015, an optimal plan for the operation and expansion of the trunk network began with the use of new optical fiber networks, which will allow increasing telecommunications services coverage.
- **Mexico connected.** In 2015, connectivity was provided in 65 thousand sites, which represented an increase of 62.5% in respect of the 40 thousand sites connected in 2014.

1.6. Public TV

In 2015, public television, through Canal Once and Canal 22, decided to bet once again on the production and broadcasting of fiction. Canal Once produced two fiction series for children: *Sofía Luna*, *Agente Especial*, which portrays the adventures of a Physics student who, using science, combats villain Otto Van Carpio, and *Kin*, which, by means of suspense and adventure, uses Mayan history to deal with current problems, such as school violence. Both fictions are aired on Canal Once Niños, which was created after the digitalization of its original signal.

In turn, Canal 22 strengthened its bonds with London BBC to broadcast by its signal series such as: *Bailando al Límite*, *Los Británicos*, *El Diario de Rae Earl*, *Einstein*, *La Teoría del Amor*, *Llamen a la Partera* and *El Molino*.

1.7. Pay TV

There are 16,882,000 households in Mexico and, according to the Latin American Multichannel Advertising Council (Lamac), 50.6% of them have some pay TV service.

The progress made by pay TV means that this type of system has gained relevance in the taste of Mexican audiences since, while Lamac claims that open television decreased its rating in 23 points, it also claims that 17 of these points were transferred to pay TV (Lamac, 2016).

1.8. Information and Communication Technology (ICT) trends

According to Dataxis, consulting company focused on the measurement of video streaming companies, the Mexican market is dominated by US company Netflix, which controls 55.7% of the market, followed by ClaroVideo, associated with company Telmex, owned by Carlos Slim, which dominates 39.7% of the sector.

The accelerated growth of the latter is due to the packaging of services through Telmex, which, along with its subsidiary Internet Prodigy, offers the broadband service at a lower cost if their subscribers opt to transfer to ClaroVideo.

The relevance of the Mexican market for the streaming industry is so strong that today Mexico is the second largest market in the world for Netflix. This is the reason why the company decided to start producing series exclusively for national audiences. They did so with series *Club de Cuervos*, which portrays the vicissitudes of the managers of a soccer club. The second season of this series will premiere in mid 2016.

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

Table 1. Fiction broadcast in 2015 (national and foreign; premieres and reruns; and co-productions)

PREMIERE NATIONAL TITLES – 19	PREMIERE FOREIGN TITLES – 20
<p>Televisa – 11 titles</p> <ol style="list-style-type: none"> 1. <i>Que Te Perdona Dios, Yo No</i> (telenovela) 2. <i>Amores con Trampa</i> (telenovela) 3. <i>Como Dice el Dicho 3</i> (dramatized) 4. <i>La Vecina</i> (telenovela) 5. <i>Amor de Barrio</i> (telenovela) 6. <i>A que no Me Dejas</i> (telenovela) 7. <i>Antes Muerta que Lichita</i> (telenovela) 8. <i>Pasión y Poder</i> (telenovela) 9. <i>Simplemente María</i> (telenovela) 10. <i>La Imperdonable</i> (telenovela) 11. <i>La Rosa de Guadalupe 4</i> (dramatized) <p>TV Azteca – 4 titles</p> <ol style="list-style-type: none"> 12. <i>Así en el Barrio como en el Cielo</i> (telenovela) 13. <i>UEPA, un Escenario para Amar</i> (telenovela) 14. <i>Caminos de Guanajuato</i> (telenovela) 15. <i>Tanto Amor</i> (telenovela) <p>Canal Once – 3 titles</p> <ol style="list-style-type: none"> 16. <i>Kin</i> (series) 17. <i>Sofía Luna, Agente Especial</i> (series) 18. <i>Réquiem por Leona Vicario</i> (series) <p>CO-PRODUCTIONS – 1</p> <ol style="list-style-type: none"> 19. <i>El Dandy</i> (Series – USA) 	<p>Televisa – 10 titles</p> <ol style="list-style-type: none"> 20. <i>En Otra Piel</i> (telenovela – USA) 21. <i>Aurora</i> (telenovela – USA) 22. <i>Amores de Mercado</i> (telenovela – Colombia) 23. <i>El Señor de los Cielos 2</i> (Series – USA) 24. <i>Pecados Ajenos</i> (telenovela – Colombia) 25. <i>La Diosa Coronada</i> (series – Colombia) 26. <i>Tierra de Reyes</i> (telenovela – USA) 27. <i>La Tormenta</i> (telenovela – USA/Colombia) 28. <i>Dueños del Paraíso</i> (telenovela – USA) 29. <i>La Viuda Negra</i> (series – Colombia) <p>TV Azteca – 3 titles</p> <ol style="list-style-type: none"> 30. <i>¿Qué Culpa Tiene Fatmagül?</i> (telenovela – Turkey) 31. <i>Amores Robados</i> (miniseries – Brazil) 32. <i>Insensato Corazón</i> (telenovela – Brazil) <p>Canal 22 – 7 titles</p> <ol style="list-style-type: none"> 33. <i>Bailando al Límite</i> (series – England) 34. <i>Bandoleras</i> (series – Spain) 35. <i>Los Británicos</i> (series – England) 36. <i>El Diario de Rae Earl</i> (series – England) 37. <i>Einstein, la Teoría del Amor</i> (series – England) 38. <i>Llamen a la Partera</i> (series – England) 39. <i>El Molino</i> (series – England) <p>RERUN TITLES – 6</p> <p>Televisa – 5 titles</p> <ol style="list-style-type: none"> 40. <i>La CQ</i> (series) 41. <i>Hasta que el Dinero Nos Separe</i> (telenovela)

	<p>42. <i>La Patrona</i> (telenovela) 43. <i>La Fea más Bella</i> (telenovela) 44. <i>Rubí</i> (telenovela)</p> <p>TV Azteca – 1 title 45. <i>La Loba</i> (telenovela)</p> <p>TOTAL PREMIERE TITLES: 39 TOTAL RERUNS: 6</p>
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In 2015, in Mexico 39 titles premiered, one more than in 2014. However, it should be pointed out that 19 of the 39 titles are foreign. Despite this, the number of national productions grew, reaching 19, five more than in 2014.

It is worth mentioning the return of Canal Once to fiction production, which had not produced three series in one year since 2012. In spite of the crisis in fiction production that TV Azteca has been suffering since 2010, it produced four *telenovelas* this year, something that had not happened in the last five years.

Unlikely the last three years, in 2015 the number of reruns decreased, since only six titles were rerun, and not more than ten, as it had been occurring.

Likewise, it should be pointed out that the agreement between TV Azteca and Globo (Brazil) is still in effect, although without the success represented by titles such as *Avenida Brasil* and *Rastros de Mentiras*, since in 2015 no Brazilian *telenovelas* managed to reach the position of the most viewed in the year.

Table 2. Premiere fiction in 2015: countries of origin^{6,7}

Country	Titles	%	Chapters/ episodes	%	Hours	%
NATIONAL (total)	19	59.4	1857	53.8	811:05:00	53.0
OBITEL COUNTRIES (total)	13	40.6	1595	46.2	719:35:00	47.0
Argentina	0	0.0	0	0.0	0:00:00	0.0
Brazil	2	0.0	147	4.3	0:00:00	0.0
Chile	1	3.1	105	3.0	47:25:00	3.1
Colombia	2	6.3	109	3.2	50:05:00	3.3
Ecuador	0	0.0	0	0.0	0:00:00	0.0
Spain	1	3.1	210	6.1	94:50:00	6.2
USA (Hispanic production)	7	21.9	1024	29.7	462:00:00	30.2
Mexico	19	59.4	1797	52.1	811:05:00	53.0
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
TOTAL	32	100.0	3452	100.0	1530:40:00	100.0
NATIONAL CO-PRODUC- TIONS	0	-	0	-	0:00:00	-
IBERO-AMERICAN CO- PRODUCTIONS	1	-	24	-	11:20:00	-

Made by Obitel with data from Ibope AGB México, S.A. de C.V., “Base de Datos de Ratings TV Cinco Dominios + Videotrack regular”, Software MSS® TV. Total TV programming in 2015.

In 2015 both the number of premiere titles and the number of episodes and hours aired increased. In total, a little over 500 chapters were aired. The main change occurred in national productions, which, in general, increased the number of episodes per title.

As to the countries where the premiere fictions originated, national production continues to be dragging behind foreign produc-

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⁷ The data about air times and the total number of chapters were generated exclusively by Obitel Mexico.

tion. Obitel countries with the most titles presented were the US, Brazil, Colombia, Spain and Chile. Beyond that space, it is worth mentioning Turkish *telenovela* *¿Qué Culpa Tiene Fatmagül?*; however, it was not as successful in Mexico as it had been during 2014 in several Obitel countries.

Table 3. Co-productions

	Titles	Co-producing countries	Producers	Format
Mexico + Obitel countries	<i>El Dandy</i>	Mexico	Televisa	Series
		USA	Sony Pictures	
TOTAL TITLES CO-PRODUCED WITH OBITEL COUNTRIES: 1				
TOTAL TITLES CO-PRODUCED BY OTHER OBITEL COUNTRIES + NON OBITEL COUNTRIES: 0				
TOTAL CO-PRODUCTIONS: 1				

El Dandy is a series that was broadcast in Mexico by private network TNT and by national open television through Canal 5 (Televisa). The main plot of the series consists in showing how economic necessity forces a young man to get involved with organized crime. In its national broadcast, it reached a rating below three points.

Table 4. Chapters/episodes and hours aired by time slot^{8,9}

Time slot	National			Ibero-American			Total		
	C/E	%	H	C/E	%	H	C/E	%	H
Morning (6:00-12:00)	0	0.0	0:00:00	0	0.0	0:00:00	0	0.0	0:00:00
Afternoon (12:00-19:00)	953	51.3	4:03:05	0	0.0	0:00:00	0	0.0	0:00:00
Prime time (19:00-22:00)	904	48.7	4:08:00	653	40.9	3:14:20	0	0.0	0:00:00
Night (22:00-24:00)	0	0.0	0:00:00	942	59.1	4:05:15	0	0.0	0:00:00
Total	1857	100.0	8:11:05	1595	100.0	7:19:35	3452	0.0	15:30:40

Made by Obitel with data from Ibope AGB México, S.A. de C.V., "Base de Datos de Ratings TV Cinco Dominios + Videotrack regulat", Software MSS® TV. Total TV programming in 2015.

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⁹ The data about air times and the total number of chapters were generated exclusively by Obitel Mexico.

Table 5. Formats of national and Ibero-American fiction

Format	National						Ibero-American					
	Titles	%	C/E	%	H	%	Titles	%	C/E	%	H	%
<i>Telenovela</i>	13	68.4	1638	91.4	7:07:10	91.0	8	61.5	1148	72.0	5:09:05	70.0
Series	4	21.1	95	5.3	0:35:45	5.0	4	30.8	440	27.6	1:38:40	20.0
Miniseries	0	0.0	0	0.0	0:00:00	0.0	1	7.7	7	0.4	0:31:50	10.0
Telefilm	0	0.0	0	0.0	0:00:00	0.0	0	0.0	0	0.0	0:00:00	0.0
<i>Unitario</i>	2	10.5	60	3.3	0:28:10	4.0	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	1793	100.0	8:11:05	100.0	13	100.0	1595	100.0	7:19:35	100.0

Made by Obitel with data from Ibope AGB México, S.A. de C.V., "Base de Datos de Ratings TV Cinco Dominios + Videotrack regular", Software MSS® TV. Total TV programming in 2015.

Table 6. Formats of national fiction per time slot

Format	Morn- ing	%	After- noon	%	Prime time	%	Night	%	To- tal	%
<i>Telenovela</i>	0	0.0	6	60.0	7	77.8	0	0.0	13	68.4
Series	0	0.0	2	20.0	2	22.2	0	0.0	4	21.1
Miniseries	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Telefilm	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
<i>Unitario</i>	0	0.0	2	20.0	0	0.0	0	0.0	2	10.5
Docudrama	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Others (soap opera, etc.)	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Total	0	0.0	10	100.0	9	100.0	0	0.0	19	100.0

Made by Obitel with data from Ibope AGB México, S.A. de C.V., “Base de Datos de Ratings TV Cinco Dominios + Videotrack regular”, Software MSS® TV. Total TV programming in 2015.

Prime time remains as the most important time slot in terms of fiction broadcasting, followed by the afternoon slot, as can be observed in tables 4 and 5. The *telenovelas* are mainly found in these slots, which continue to be the main format used by Mexican networks (Table 6). Unlikely the last two years (2013 and 2014), this year there was not greater production of other formats. Besides, series production decreased notably. The only formats that kept their presence were the dramas based on religious or popular topics, such as *La Rosa de Guadalupe* and *Como Dice el Dicho*, both by Televisa, which managed to reach the top ten this year. It is worth highlighting that a not very common format on national TV, the miniseries, was broadcast by TV Azteca. *Amores Robados*, a Brazilian miniseries, was broadcast in 2015 without much success, despite the fact that in its country of origin, Brazil, it achieved great rating.

Table 7. Time period in which fiction is set

Time period	Titles	%
Present	19	100.0
Period	0	0.0
Historical	0	0.0
Other	0	0.0
Total	19	100.0

The abandonment of the production of historical or period fictions has been a constant phenomenon on national open television. However, in the current year, 2016, Televisa will once again present the production of a period piece, *El Hotel de los Secretos*, a *telenovela* that Televisa premiered on its streaming website, Blim, before doing so on national open television.

Table 8. The ten most watched titles: origin, rating, share¹⁰

	Title	Country of original idea or script	Producer	Channel	Script-writer or author of original idea	Rating	Share
1	<i>Amores con Trampa</i>	Chile	Televisa	Canal 2	Emilio Larrosa	19.1	30.0
2	<i>Lo Imperdonable</i>	Mexico	Televisa	Canal 2	Ximena Suárez	18.16	27.58
3	<i>Antes Muerta que Lichita</i>	Mexico	Televisa	Canal 2	Covadonga Espeso	16.75	26.33
4	<i>La Rosa de Guadalupe</i>	Mexico	Televisa	Canal 2	Carlos Mercado	16.3	32.18
5	<i>Pasión y Poder</i>	Mexico	Televisa	Canal 2	Marissa Garrido	15.55	24.59
6	<i>Como Dice el Dicho</i>	Mexico	Televisa	Canal 2	José Olvera	15.52	30.65
7	<i>A que no Me Dejas</i>	Mexico	Televisa	Canal 2	Eric Vonn	15.46	26.71
8	<i>Que Te Perdona Dios, Yo No</i>	Mexico	Televisa	Canal 2	Caridad Bravo	15.43	28.04
9	<i>La Vecina</i>	Colombia	Televisa	Canal 2	Lucero Suárez	14.93	27.91

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10	<i>Amor de Barrio</i>	Mexico	Televisa	Canal 2	Fernanda Villeli	12.56	25.39
Total productions: 10				Foreign scripts: 2			
100%				20%			

Made by Obitel with data from: Ibope AGB México, S.A. de C.V., “Base de Datos de Ratings TV Cinco Dominios + Videotrack regular”, Software MSS® TV. Target: total households, 28 cities. The rating is measured electronically – 24 hours a day, 365 days a year – with the use of people meters installed in a representative sample of households.

There are two events that stand out in the 2015 top ten. The first is that the inertia was broken in respect of the fact that the majority of most watched fictions did not have a national script. In the years 2012, 2013 and 2014, 80% of the most watched fictions had foreign scripts and only 20% were Mexican. In 2015, this situation was reconfigured and now the majority of the scripts are original ideas. However, the most watched *telenovela*, *Amores con Trampa*, is Chilean. The other relevant event is that *unitarios*, such as *La Rosa de Guadalupe* and *Como Dice el Dicho*, by Televisa, were among the most watched fiction products, which is unheard-of, for the top ten had been so far dominated by *telenovelas* and series.

Table 9. The ten most watched titles: format, length, time slot^{11,12}

	Title	Format	Genre	Number of chap./ep. (in 2015)	First and last broadcast (in 2015)	Time slot
1	<i>Amores con Trampa</i>	<i>Telenovela</i>	Drama	126	03/02/15-08/23/15	Prime time
2	<i>Lo Imperdonable</i>	<i>Telenovela</i>	Drama	121	04/20/15-10/04/15	Prime time
3	<i>Antes Muerta que Lichita</i>	<i>Telenovela</i>	Comedy	131	10/05/15-04/10/16	Prime time

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¹² The numbers of episodes or chapters are exclusively by Obitel Mexico.

4	<i>La Rosa de Guadalupe</i>	<i>Unitario</i>	Drama	30	05/05/15-08/02/15	Afternoon
5	<i>Pasión y Poder</i>	<i>Telenovela</i>	Drama	136	10/05/15-04/10/16	Prime time
6	<i>Como Dice el Dicho</i>	<i>Unitario</i>	Drama	30	03/07/15-06/20/15	Afternoon
7	<i>A que no Me Dejas</i>	<i>Telenovela</i>	Drama	141	02/07/15-07/29/15	Prime time
8	<i>Que Te Perdones Dios, Yo No</i>	<i>Telenovela</i>	Drama	116	01/19/15-07/26/15	Afternoon
9	<i>La Vecina</i>	<i>Telenovela</i>	Comedy	176	05/25/15-01/24/16	Afternoon
10	<i>Amor de Barrio</i>	<i>Telenovela</i>	Comedy	111	06/08/15-10/08/15	Afternoon

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The comedy continues to maintain a significant acceptance among Mexican audiences, since *telenovelas* such as *La Vecina* or *Amor de Barrio* managed to rank on the last spots of the top ten. The above confirms the idea that not only drama is a genre that, at present, is dominating the tastes of those who watch TV fiction in Mexico.

Table 10. Themes in the ten most watched titles

	Title	Prevailing themes	Social themes
1	<i>Amores con Trampa</i>	Friendship, love, family values.	Corruption, migration from the country to the city, poverty.
2	<i>Lo Imperdonable</i>	Betrayal, love, obsession, forgiveness.	Homicide, violence.
3	<i>Antes Muerta que Lichita</i>	Love, envy.	Digital literacy, social responsibility.
4	<i>La Rosa de Guadalupe</i>	Religion, redemption, faith, hope.	Violence, bullying, addictions, nutrition problems, drug traffic.
5	<i>Pasión y Poder</i>	Power, love.	Political and corporate corruption, social violence.
6	<i>Como Dice el Dicho</i>	Solidarity, friendship, family values.	Violence, street harassment, corruption, ecological problems.
7	<i>A que no Me Dejas</i>	Love, family values, vengeance, overcoming.	Social violence, organized crime, intra-family violence.
8	<i>Que Te Perdones Dios, Yo No</i>	Love, faith, vengeance, redemption.	Social violence, addictions, racial discrimination.

9	<i>La Vecina</i>	Love, friendship, community ties.	Honesty in the police corps, building of the community.
10	<i>Amor de Barrio</i>	Love, overcoming, friendship.	Corruption, negligence in the justice system, prostitution.

Made by Obitel Mexico

Despite the systematic effort to include some current social issues in Televisa *telenovelas*, in general, they still persist in getting away from the narratives that connect the reality of Mexican audience with the fictional lives portrayed in the *telenovelas* and series. There was a veiled attempt in *Pasión y Poder* at using the *telenovela* as a mean to talk about national political life; however, the presence of characters connected with politics or the corporate class did not translate as the presentation of a narrative that really approached issues of political-public interest, since at no moment the issues of corruption handled by the fiction were connected with an actual concrete situation. Mexico, as a country, and the federal government, as the political-party structure, did not appear in the plot of this *telenovela*, which, despite the fact that it occupied the privileged time slot at Canal 2, did not manage to become the most watched in the country.

Table 11. Audience profile of the ten most watched titles: gender, age, socioeconomic status¹³

	Title	Channel	Gender %		Socioeconomic status %			
			Women	Men	ABC+	C	D+	DE
1	<i>Amores con Trampa</i>	Canal 2	10.1	5.8	12.4	17.2	9.0	11.2
2	<i>Lo Imperdonable</i>	Canal 2	9.8	5.2	12.6	16.3	8.6	10.0

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3	<i>Antes Muerta que Lichita</i>	Canal 2	9.3	4.9	11.7	13.9	8.2	9.8
4	<i>La Rosa de Guadalupe</i>	Canal 2	8.7	3.8	4.1	5.1	17.6	8.6
5	<i>Pasión y Poder</i>	Canal 2	8.4	4.6	12.0	14.3	7.2	8.3
6	<i>Como Dice el Dicho</i>	Canal 2	8.2	3.5	3.9	5.0	17.0	78.0
7	<i>A que no Me Dejas</i>	Canal 2	8.4	3.9	11.0	13.7	7.2	8.2
8	<i>Que Te Perdone Dios, Yo No</i>	Canal 2	8.2	3.7	10.7	13.7	6.9	7.9
9	<i>La Vecina</i>	Canal 2	8.0	3.6	10.7	14.0	6.8	7.5
10	<i>Amor de Barrio</i>	Canal 2	6.6	2.6	8.8	12.1	5.9	6.8

	Title	Channel	Age group %					
			4-12 ¹⁴	13-17	18-24	25-39	40+	50+
1	<i>Amores con Trampa</i>	Canal 2	7.9	6.4	6.8	8.1	9.0	--
2	<i>Lo Imperdonable</i>	Canal 2	7.6	5.6	6.5	7.8	8.8	--
3	<i>Antes Muerta que Lichita</i>	Canal 2	7.1	6.0	6.3	7.5	7.9	--
4	<i>La Rosa de Guadalupe</i>	Canal 2	6.3	6.0	5.6	6.2	7.6	--
5	<i>Pasión y Poder</i>	Canal 2	6.5	4.6	5.9	6.9	7.3	--
6	<i>Como Dice el Dicho</i>	Canal 2	5.9	5.5	5.0	5.9	7.1	--
7	<i>A que no Me Dejas</i>	Canal 2	6.2	4.5	5.4	6.2	7.3	--
8	<i>Que Te Perdone Dios, Yo No</i>	Canal 2	6.0	4.6	5.3	5.8	6.7	--
9	<i>La Vecina</i>	Canal 2	5.9	4.8	5.1	5.8	6.6	--
10	<i>Amor de Barrio</i>	Canal 2	4.7	3.8	4.0	4.6	5.4	--

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Table 11 shows relevant data regarding children and young audiences of TV fiction, since in 2015 they turned their backs on television, but not on the *telenovelas*, for, despite the falls in rating

¹⁴ By request of Obitel, the cuts 13-17, 18-24, 25-39 and 40+ were made by Nielsen Ibope México. This year, the age group 50+ was not considered.

in these age groups, a good portion of these audiences watch their *telenovelas* and series on digital platforms and on their cell phones.

As to the socioeconomic levels, the profile of the average fiction viewer in Mexico is female, aged 35-49 years, of middle class and lower middle class.

3. Transmedia reception

This year we decided to analyze *telenovela Antes Muerta que Lichita*, produced by Rosy Ocampo, by Televisa. The *telenovela* was aired from Mondays to Fridays at 8:20 p.m. and had 131 chapters, lasting 45 to 65 minutes each. The main character was played by Maite Perroni, in her role of “Lichita”. She is an assistant at Icónika, the most important advertising agency in Ibero-America, where she is the laughing stock because of her appearance.

One day “Lichita” decides to get a makeover and changes her looks and personality. Also, she changes her name to Alicia and thus recovers the right she is entitled to in the company because of her work effort. She falls in love with Roberto Duarte (Arath de la Torre), with whom she suffers her first heartbreak. The plot is the classical one: an “ugly” woman who can only be acknowledged by the others when transformed into someone “pretty”. As part of these digital contents, we found the following content on the official page of the *telenovela*¹⁵, which, as it can be observed, targets all the members of the family.



Televisa bet on the digital by releasing 16 applications connected to this melodrama, in addition to opening sites on the social networks.

¹⁵ <http://television.televisa.com/telenovelas/antes-muerta-que-lichita/>

Interaction through the social networks

At the time of writing this report (April, 2016), the total number of users on the official Facebook page was 137,925. The most promoted type of interaction consisted in inviting the audience to “like” images, preview videos and photos of the stars, so an active participation prevailed. Through Facebook, the users are urged to download Televisa Television application to enjoy a “new experience” and watch the *telenovela* through it. Also, people are urged to use hashtags such as #FinalAMQL “to join the talk” in which people share their opinion about the contents of the *telenovela* or the future of the plot.¹⁶

On the official website, there were several links to watch previous episodes (up to five), photo galleries, media content, behind the scenes and info about the *telenovela*. Also, it is possible to watch a webnovela – *Corazón Enamorado* – with actors that are not well-known (they are from the Televisa performing center). It is a plot connected to the world of “Lichita” and, within the plot, the characters even watch chapters of the webnovela. It had not been witnessed in any Mexican fiction; therefore it is a Televisa innovation.

The media content section is divided as follows:

- a) Blog Lichita: the character writes her thoughts and advice.
- b) Secret files: scenes that were not aired on television, as exclusive material.
- c) Gumaradas: a character who uses coarse language and appears on the Televisa forum to interact with actors with whom he jokes.
- d) Learning with Elsa: the main character’s mom appears with her granddaughter, who teaches her how to use the internet and digital tablets.
- e) 2LA2: two characters who speak about several topics.
- f) Ximena’s space: a platform where the main character’s niece invites children to play the official game of the *telenovela*

¹⁶ <https://www.facebook.com/AMQLichita/?fref=ts>

(Godinez World), which, according to producer Ocampo, had 600,000 downloads in three months (Zócalo Saltillo, 2016) and surpassed 9 million game sessions.

- g) Dafyzone: “tips to overcome teenage and not die trying”.
- h) Characters test: surveys.

4. Highlights of the year

Information censorship in national and state, public and private, channels

The national media context during 2015 was marked by the unprecedented contrasting events in the country’s recent history, both media, political and particularly “fictional” events.

During April and May 2015, Mexico witnessed the development of the electoral campaign for municipal presidents (mayors) and senators in half the states of the country. In Jalisco, and in particular in Guadalajara, where the Obitel main offices are located, the media and TV-radio coverage was monitored during the electoral campaign, which lasted nine weeks. This monitoring process was carried out by the University of Guadalajara as one of the two state universities appointed and selected by the Citizen Participation State Institute (IEPC, in Spanish). The press monitoring was carried out by Iteso, the Guadalajara Jesuit University. While this opened a professional and academic option to carry out an independent monitoring of the media during the electoral campaign, the obligatory participation of state public channel C7 was shut down in an untimely authoritarian manner; so they did not cover or broadcast the electoral campaign, even though they are required to do so by law. The classic Jalisco state channel did not cover a single news story about the elections on its screen. This decision has been labeled as a “flagrant violation of the audiences’ rights” (Amedi Jalisco, 2015: 34) and it has had negative repercussions both for the channel itself and for the state government, whose party did not win the elections, as expected.

There were two other serious incidents of information censorship in the Mexican capital. The first concerns commercial radio station MVS Multivisión, where Journalist Carmen Aristegui's contract was terminated abruptly. She and her journalistic investigation team had "exposed" and documented in detail the case of the presidential mansion and its obscure provenance. The well-known journalist was not laid off immediately, but later, when she was accused of announcing, without consulting the owner of the station, that her news show was joining a network of democratic stations – a fact that, as it was claimed, infringed the agreement with the radio station. The case was presented in court, but it is not predicted to be resolved in favor of the censored journalist.

Another case of censorship occurred in one of the most representative public channels in the country: Canal 22, also called "Mexico's cultural channel", where its director Raúl Cremoux decided to eliminate two classic news shows: *El Observador* and *Global*. The above was interpreted by the channel's journalists as the culminating point of the harassment started in March, after this national public channel spread the news of Carmen Aristegui's layoff. The journalists denounced that, within the channel, there was a "censoring practice of revising, mutilating and not airing shows emphatically referring to criminal and social violence and those connected with safety and the violation of human rights" (Zócalo, 2015:4).

The Virgin of Guadalupe and her miracles and the escape of El Chapo Guzmán: "fictions" with high rating

In a context of growing violence and impunity in the country, *unitario La Rosa de Guadalupe*, where the miraculous Virgin is the main character and the *raison d'être* of the plot, since she is the only one who can solve the violence presented in the stories, ranked within the top ten for the second time, leaving behind classic Televisa *telenovelas*.

On the other hand, the news story and the repetition of the reports about drug dealer El Chapo Guzmán's escape from the

maximum security prison in Almoloya de Juárez, though true facts, seemed like a huge fiction, with a script that was followed by all those involved: El Chapo himself, his buddies at the cartel, but also the prison guards and the other police and security force officers who were close and not so close to the character. The news story was told in episodes until the whole escape was shown in detail. It was later known that the main character wanted to have his own movie made; to this end, he had communicated with actress Kate del Castillo, the star of *telenovela La Reina del Sur*, and now she could have had another costar role along El Chapo, in another “narcotelenovela” if he had not been recaptured. Fantasy and reality intertwined travelled the Latin world and became trending topics, helping us think about the role of reality in fiction and the role of fiction in reality.

Reconsideration of the networks’ business plan

Migration of a sector of open TV audiences to other screens and other TV contracts, especially the middle and upper middle class young audiences, along with the imminent opening up of a third national network to vie for viewership, has compelled both TV Azteca and Televisa to reorganize their investments and programming offers. TV Azteca has followed the strategy of innovative contents, both imported and of its own, and news and fictional programming. For the news it has set a studio with the latest technology, which seems to be working in attracting more audiences. Regarding fiction it has associated with Globo to air successful Brazilian *telenovelas*, such as *Avenida Brasil*, which, although they have not reached the top ten as in the country of origin, have managed to attract more sponsors for the network. Televisa, in turn, has implemented tactics from more efficient organizational strategies and a considerable personnel cut to save in salaries to campaigns to attain more subscribers in its paid, cable and satellite systems. Its readjustments have yielded great profits, since their origin is not determined only by those coming from open television, but from a combination of sources of income. The 2015 financial statement reports a rise in

global sales of 9.9% in the year, more than that obtained in 2014 (Posada, 2016:21).

5. Theme of the year: (re)invention of TV fiction genres and formats

Since the first *telenovela* was aired in Mexico, *Senda Prohibida* (1958), starring Silvia Derbez, the format has undergone several transformations. *Senda Prohibida* told about the love of a married man with the “other” woman, who was not his wife. It is said that outside Televisión building, “a crowd of housewives awaited the actress who played the mistress to insult her for her TV evils” (Reyes de la Maza, 1999:14-15). The genre became consecrated with *Gutierritos* (1959), starring Rafael Banquells, who played the “good guy” that suffered in the hands of his wife. These two stories had therefore antagonistic female roles (the “other” and the abusive wife). Other stories that were produced later represented the woman as a villain (*Teresa*). The *telenovela* appeared on the screens by Caridad Bravo Adams’ pen in the 1960s. Reyes de la Maza (1999) claims that the popularity of the *telenovela* went through several experiments, “by trial, success and error”. Other narratives and styles that have been dealt with in the melodrama have been black humor, with *Doña Macabra*, produced in 1963 by Ernesto Alonso, with the seal of Televisión Mexicana (today Televisa). It was by Caridad Bravo Adams’ and Yolanda Vargas Dulché’s pens that a new style of storytelling began and established as a trademark or a model of *telenovela* (classic like a Cinderella story), with stories such as *María Isabel*, starring Silvia Derbez, who played the traditional “Cinderella” who marries the prince after overcoming many obstacles (Reyes de la Maza, 1999). This *telenovela* attained a rating of 53 points (p. 54). This melodramatic scheme would be repeated over and over again with minimal variations (p. 55). Television had experimented enough and thus a style was established that is to date popular and enjoys great acceptance, one in which the woman suffers, there is a villain that makes her life miserable and, yet, she lives a love story.

As to historical *telenovelas*, the first to be produced was *Sor Juana Inés de la Cruz* (1963), which turned out to be a failure in terms of production. One of the stories that transcended, according to Reyes de la Maza (1999), was *Maximiliano y Carlota* (1965). This and other productions (*Tradiciones y Leyendas de la Colonia*, *Leyendas de México*) were experiments the television conducted, in which more care was taken with the production, special effects were used, they started shooting on location and integrating groups of writers with a formation different from that of conventional scriptwriters, in addition to exploring the tastes of the public (p. 43).

In the beginning the *telenovela* was broadcast live, with actors who were supposed to memorize their lines and act “live”. The audience thus sat around their TV sets to enjoy the stories. Years later the actors would follow the directions from the “prompter”, the scenes were shot one after the other and the star system began: actors started shining and gaining popularity.

Televisa is one of the largest *telenovela* producers in the world and in the 1960s it began exporting to other countries. It should be pointed out that Telesistema Mexicano (today Televisa) agreed to broadcast *Simplemente María* (1967), a Peruvian production that had rating levels that were higher than those of domestic *telenovelas*, in addition to being the longest in the genre (425 chapters). This *telenovela* did not reproduce the “Cinderella” model; rather, the woman was presented as a hard-working person who was creative, independent and climbed the social ladder thanks to her talent (Reyes de la Maza, 1999:65). At the time, *telenovelas* had 60 or 120 chapters in total (at present, the average is 120 to 150 chapters).

As we can observe in this brief review, the melodrama genre has not remained static since its origins. Its producers experimented at the beginning with stories, scenarios and actors. What has been able to prevail, though, in most of the stories is the classic melodrama. However, in the last ten years and above all since the digital

convergence, we have seen how public and private networks are transforming the way in which they narrate, expand and produce the stories seeking this way to preserve their audiences.

Fiction production in Mexico: what remains and what is (re)invented

Since 2006, we have been reporting at *Obitel* the most important data in relation with TV fiction. In this section, we review the yearbooks of ten years so as to present what we observe as tendencies, how the TV fiction format is being reinvented and what remains. We have detected several points that should be underscored:

What remains

Fewer Mexican scripts, production under franchises and products written by foreign script writers. There used to be a prevalence of scripts written by Mexicans; however, since 2005, the networks have bought the rights of other stories under the modality of franchises, adapting them to the local taste. An example is *La Fea más Bella*, starring Angélica Vale and Jaime Camil. This *telenovela* was an experimental marketing laboratory because it was moved from time slots as it rose in the ratings and did not have a standard behavior in terms of running time (60 to 80 min.) (Orozco, 2007). Other franchise products were *RBD la Serie*, aired only by Sky (paid signal owned by Televisa), which meant a marketing effort (what is known as a transmedia product), and *Lola Érase una Vez* (adaptation of the Argentine *Floricienta*). These productions sought to recover the young audience, but failed to do so.

Fiction occupies the third place among the genres with the most production hours, but it has the first place in rating. The genres with the most production hours are entertainment and, in the second place, information. Nevertheless, it is the *telenovela* format that reaches the highest rating indexes (over 20 points).

Telenovelas are programmed for prime time. One third of the

fiction is programmed for this time slot, and it is Televisa that concentrates the largest production on a national level.

The tendency remains unstable in terms of premiere national titles. In 2006, 28 productions premiered; by 2007, it had come down to 18; by the following year, it had risen to 27 titles; in 2011, it dropped again, now to 23; a year later, it rose to 28; in 2013, it dropped to 18 productions; in 2014 it almost doubled, with 34; and by 2015 it had been cut almost to half, 19. Televisa remains as the largest fiction producer. Production hours have ranged from 11,000 to 16,000.

Successful Marian element: Televisa continues to be distinguished by inserting the divine character in its productions, and the figure of the Virgin of Guadalupe appears in many stories. It is remarkable how well-accepted the series (one-episode drama) *La Virgen de Guadalupe* became, where problems are solved by applying “God’s Law”. This series has an average of 19.8 rating points, more than many *telenovelas*; it is even among the most viewed shows on the national level (occupying the 11th place).

Female stars stand out. They are vindicated, but, at the end of the plot, they end up subordinated to the man.

The public prefers classic stories. Even though all the networks have experimented with scripts from other countries, what the rating figures reveal is that viewers continue to opt for the traditional drama.

What is (re)invented

TV Azteca places telenovelas from other countries at prime time. It is an innovation to air at prime time Brazilian productions that deal with innovative topics (homosexuality), such as *Avenida Brasil* and *Rastros de Mentiras*, both within the top ten in 2014. In 2015, TV Azteca aired at prime time *¿Qué Culpa Tiene Fatmagül?*, a Turkish *telenovela* that was produced in 2010 and was a success both in Chile and Peru, but not widely accepted in Mexico. Latin American fiction was non-existent on Mexican television according

to what was reported in 2007 (Orozco, 2007:228), but from 2014 onwards the situation changed through TV Azteca.

Production of series by public and private networks. This type of genre and format was not a programming option for culturally-oriented public television (Orozco, 2007:228), but in 2006 Once TV started to produce them. In 2012, it made *Paramédicos* and *Kipatla*. On the other hand, public channels from other Mexican states began to produce fiction, including a *telenovela* in Maya language, *Baktum*. In 2013, we noticed a drop in the production of public networks, which we believe is due to changes in the management of the channels and budget cuts. In 2015, Once TV produced *Sofía Luna*, *Agente Especial* and *Kin*. In turn, Televisa, in its quest for gaining viewership, started producing series in 2007, which were aired by Canal 5, such as *S.O.S* (a hybrid between *Sex and The City* and *Desperate Housewives*), *Pantera* and *Miedos*. Even though they covered innovative topics, as an average they had a rating of 2.8 points. We believe that the audience continues to prefer less real and more classic topics (Orozco, Hernández and Huizar, 2009).

Inclusion of realistic topics. Since the moment that the war on organized crime is declared, (2007), this issue has been present in the stories, seeking to portray “the links between the government or the police and the groups of organized crime” (Orozco et al., 2010: 404). There have also been social issues (citizenship, abortion), but at the end they aim to inhibit citizens’ right, as in the case of *Alma de Hierro* (2008). According to Franco (2012), it was in 1996 when the *telenovelas* began to deal with subjects more connected with the social reality,

since the stories took place in cities and countries that were not recognizable [...]. Their historical narrative pillars – such as the nuclear family (father, mother and children), the drama of acknowledgement, the climbing of the social ladder, the image of the dedicated woman and,

above all, the catholic precepts – had not made it possible to create new themes contrary to that fictional reality, since systematically the dramas in the *telenovelas* sought to divert the eyes from the social/real scenario (Franco, 2012:45).

Televisa and TV Azteca increased the number of chapters in their telenovelas and many of them as an average run for 30 to 50 chapters more than they used to. Successful projects are lengthened and the ending day of the *telenovela* is changed. At present, on Televisa, the finales are aired on Sundays. In addition, the networks have opened their contents so that they can be watched from mobile devices in real time.

Naturalization of advertising in fiction. It was in 2007 when it became integrated with the melodrama. This way, the characters co-exist with the products advertised there, incorporating them to the narrative. Besides, brand-name *telenovelas* are being produced, which means that the brand becomes an element of the narrative (it has operated in Televisa since 2009). They are *telenovelas* that take place, for example, in the factories of Ford (car manufacturer) or Avon (beauty products manufacturer). These *telenovelas* have been very successful for the companies that sponsor them.

Social merchandising. The governments from several states have contributed with funds to the productions that make propaganda about the works they have made or to promote tourism in certain regions.

Expansion and consumption of the contents from second screens. Televisa has launched the application Televisa Television, from which it is possible to watch episodes of *telenovelas* in real time. In addition, it offers downloads of exclusive images and information. Moreover, during the airing of the *telenovelas*, the viewers are urged to “vote” or express their opinions through the use of second screens. We have witnessed that in *Antes Muerta que Lichita* and *Lo que la Vida Me Robó*, by Televisa.

Loss of rating. We believe that the main cause for this is consumption of contents through other platforms of video on demand (such as Netflix or ClaroVideo) and other paid television systems. Penetration of the internet is growing, although there is still a digital gap. In 2010, there were 32.8 million users (Orozco et al., 2010) while in 2015 there are 62.4 million (Inegi, 2015), which means that the penetration doubled in five years.

The networks are thinking of “transmedia”. The companies modify their traditional production so as to move onto another paradigm. Both public and private networks experiment with new strategies in view of a media ecosystem that has evolved. They have been forced to change the way they produce, tell stories, interact with the audience, present their contents. They needed to open new routes. One of the companies that has experimented the most is Televisa, which restructured departments and divisions, hired new personnel, betted on new formats. Some of them have not worked (such as webnovela *Te Presento a Valentín*). In turn, TV Azteca has also started to experiment with other formats, releasing series *Amor a Ciegas* in 2014.

Case study: Antes Muerta que Lichita, a (re)invention of the format with digital contents targeting the whole family.

This *telenovela* is, in the opinion of producer Rosy Ocampo: “the first story by Televisa conceived entirely as a digital *telenovela* experience that addressed all the members of the Mexican family”.¹⁷ The production released 16 applications through its official website (see more details in the section about transmedia reception), which are meant for the different members of the traditional Mexican (or Latin American) family. Televisa had been experimenting with transmedia productions at least for the last three years. As it has been pointed out, these products did not have a great response from the public.

Hence, after betting and experimenting year after year, we consider that *Antes Muerta que Lichita* is the first product of its kind,

¹⁷ Retrieved on April 10, 2016 from <http://television.televisa.com/telenovelas/antes-muerta-que-lichita/noticias/2015-07-17/conferencia-acciones-digitales/>.

in terms of the amount of digital content that has been placed at the disposal of the public, and it is an example of what the next productions might be like. A fresh, traditional love story with ingredients of the comedy, a formula that has worked for Televisa in the last years (see *La Fea más Bella*). These elements of the traditional melodrama with the sum of digital interactive contents seem to be the answer for the network not to lose mainly young audiences. In *Antes Muerta que Lichita*, the innovation lies in the inclusion of technology within the plot (huge screens to present products by company Icónika) as well as the use of secondary screens to appeal to viewers' participation. As to image quality, this *telenovela* was broadcast with a resolution of 1080i in high definition. Another innovating aspect concerns the communicative interaction among the characters, who exchange text messages (via smartphones) and their contents are displayed on screen for the viewers to read. We have watched this in US series such as *Jane the Virgin*. These new languages are closer to the communication practices and to the style of world narratives.

Although this *telenovela* has a great amount of innovative content, including a webnovela within the *telenovela*, it was not the most successful fiction, as reflected by its rating (16.75 points). It seems that *telenovelas* with the narration of more conventional stories continue to be the most successful and widely accepted by the audience. In view of a context like this, they have no choice but to continue to try and innovate or else go back to old strategies that have worked. TV Azteca has announced that it will open up to independent producers and co-productions (Jiménez, 2016). Broadcasting foreign *telenovelas* did not work altogether, so it seems that they are going to produce stories once again. Innovating, (re)inventing themselves or going back to old formulas: what will work for television companies? Today audiovisual contents are more consumed than ever before in history, but through other platforms. Open television is losing audience and the telecommunications market is gaining ground.

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PERU: THE *TELENOVELA* RETURNS¹*Authors:*

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1. Peru's audiovisual context in 2015

After several years of turning its production towards miniseries, Peruvian fiction brought in 2015 a change of direction that could last for some time. Broadcasting of Turkish *telenovelas* with very good audience response made Peruvian stations reconsider their fiction formats and contents. Although miniseries continue to maintain presence on screens, they were projects that had started the previous year or at the beginning of 2015. The new projects included *telenovelas* again, even though they had disappeared completely from Peruvian fiction in 2014. However, this new scenario brought other consequences in relation to the number of Peruvian fictions produced, their contents and fictions from other Ibero-American countries, as we shall see later.

¹ In order to prepare this chapter, we had the support of Kantar Ibope Media, which provided us the reception information used in this study.

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² Professors from Pontificia Universidad Católica del Perú.

1.1. Open television in Peru in 2015

Chart 1. National open TV networks in Peru

PRIVATE NETWORKS (5)	PUBLIC NETWORKS (1)
Latina (Channel 2)	TV Perú (Channel 7)
América Televisión (Channel 4)	
Panamericana Televisión (Channel 5)	
ATV (Channel 9)	
Red TV (Channel 13)	
TOTAL NETWORKS = 5	TOTAL NETWORKS = 1

Source: Obitel Peru

The television structure in Peru had few changes in 2015. Channels already reported in previous years still remain, with very well established channel rankings, confirming the trend of previous years. However, towards the end of the year some announcements were made that could mean a change of both economic and political forces for the future. On November 24th, a strategic alliance was announced between Latina and Panamericana Televisión and, on December 1st, it was declared that Wong Corporación (devoted to supermarkets, agroindustry and transport) had become the main shareholder of Willax cable channel and that, in January 2016, it would broadcast on open signal with a varied programming and a US\$ 30 million investment in three years. Both announcements have been seen as strategic moves, since 2016 is an election year in Peru and it is common that different economic and power groups acquire media companies in election contexts. ATV group aimed at recovering several stations it owns out of Lima – that were granted a franchise – where the group had little decision-making. Something similar happened with Enfoca group, Latina’s owner since 2013. They dedicated part of their efforts to strengthen several stations owned outside Lima, since a lot of these stations had become mere antennas of Lima signal and the enterprise wanted to produce local contents. Its alliance with Panamericana turned heads since Latina consolidated itself as the second national channel in reception while Panamericana continues in crisis and is located in a distant fourth

place. However, their alliance provides them a strong presence all over the country and turns them into a powerful group with important possibilities of political pressure and an interesting screen for several candidates through informative, political or even entertainment programs.

On the economic side, the alliance between Latina and Panamericana located them as a very strong threat for the lone leadership América Televisión has had in the last years. According to the information given by Portafolio Económico³ in November 2015, América Televisión owns 37% of Peru's advertising participation, while the alliance between Latina and Panamericana Televisión could lead them to 36%, although both companies' objective is to get even a larger share. In any case, what seemed evident was that the great loser was ATV group, which had been strongly shifted towards a third position in reception and it could get worse in the following years. Meanwhile, Wong Corporación declared that they expect to be one of the top five channels by 2018, which indicates more competition in the television offer, although it is unclear how Willax expects to achieve large audiences in open signal through a channel to be broadcast in UHF⁴ frequency.

In this scenario, it did not come as a surprise América Televisión and ATV's announcement – last January 26th, 2016 – of a strategic alliance established to produce and distribute entertainment contents. This obvious response to the alliance between Latina and Panamericana Televisión predicts an interesting competition among the broadcasting companies in the following years.

³ Portal of El Comercio group, dedicated to the country's economic analysis (<http://elcomercio.pe/noticias/portafolio-economico-348850>).

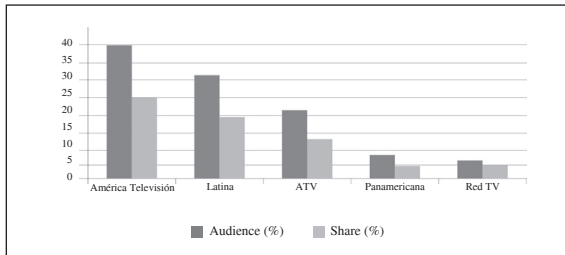
⁴ We cannot forget that the Peruvian law grants in the future a channel in the digital band to every channel using UHF frequency at the time.

1.2. Audience trends in 2015

Graph 1. TV audience and share (homes)⁵

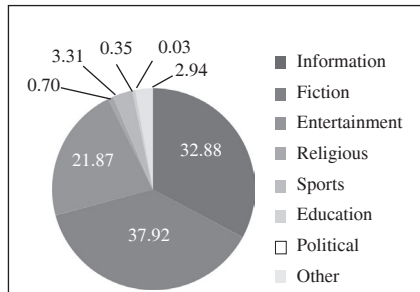
Network	Audience	%	Network	Share ⁶	%
América Televisión	8.4	38.89	América Televisión	22.70	38.74
Latina	6.5	30.09	Latina	17.60	30.03
ATV	4.2	19.44	ATV	11.40	19.45
Panamericana Televisión	1.4	6.48	Panamericana Televisión	3.80	6.48
Red TV	1.1	5.10	Red TV	3.10	5.29
TOTAL	21.6	100		58.60	100

Source: Kantar Ibope Media



Graph 2. Genres and hours broadcast in TV programming

Genre	Exhibition hours	%
Information	16985:00	32.88
Fiction	19592:00	37.92
Entertainment	11299:00	21.87
Religious	364:00:00	0.70
Sports	1711:30:00	3.31
Education	180:30:00	0.35
Political	14:00:00	0.03
Others	1517:30:00	2.94
TOTAL	51663:30	100



Source: Obitel Peru

⁵ Several years ago, TV Perú asked not to be considered in the television audience measurement. That is the reason why there is no official data in relation to this channel.

⁶ According to data provided by the Kantar Ibope Media, share does not reach 100% since there are missing channels: the rest of open signal channels, cable and VHS/DVD.

América Televisión continued to lead the viewers' preferences, despite a slight fall of its audience in comparison with 2014. The difference between América Televisión and Latina decreased, although the leader still keeps a comfortable advantage. It is evident that the fall of ATV (both in its main channel and in its satellite Red TV) becomes greater each year. This fact has moved ATV away enough of its direct competitors, with losses of 2.7% (ATV regarding Latina) and 1.8% in the case of Red TV regarding Panamericana. This is the first time in the last four years that Panamericana manages to surpass Red TV. Fiction has continued to have the preference of Peruvian audience, shared in 2015 with sport broadcasts of Copa America. National fiction has particularly regained the top position of the audience, although the big news is that, among the ten most watched fictions, three were Turkish *telenovelas*, taking the position formerly occupied by Mexican or national fictions on the national preference.

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

According to the information provided by Kantar Ibope Media, which manages official figures⁷, in 2015 notorious changes were made concerning the percentage of advertising investment in different media. Television had a serious fall in relation to its participation, being the lowest in the last four years. Even so, with 64.9% participation (14 points less than in 2014), TV is by far the medium that concentrates most of the advertising investment. Newspapers keep their decreasing trend, reaching 5.9% participation, while radio is quite stable, with just 5.8% participation.

1.4. Merchandising and social merchandising

As in previous years, several fiction productions continued inserting advertising messages into their stories, either with the char-

⁷ The enterprise manages the official pricing of communication enterprises, although in Peru it is known and common to negotiate and modify published prices with the advertisers.

acters consuming products or services of the sponsored companies, or producing small advertising spots at the end of every block of the story, before the commercial break. However, a positive decline was showed in the amount of embedded advertising, as indicated in a previous report, since it delayed the story and became unlikely at times. These resources are still present in the Peruvian fiction because they mean funding for production companies during the time of shooting, without having to wait for the economic return from advertising when fiction is on the air.

On the other hand, last years' trend concerning social merchandising was kept in 2015: this was present only in productions that contained social issues, which were fewer than in previous years, so there has been a decline in social merchandising compared to previous years.

1.5. Communication policies

In 2015, there were not important legal changes in comparison to 2014. The deadlines are still kept for the full entrance of digital TV, and companies can even begin their test signals in the available digital channels. Little has changed during the year in terms of channels' broadcasting through digital signal, and not even large companies have extended their offer in the four signals they have been granted.

1.6. Information and Communication Technology (ICT) trends

Internet introduction in Peru continues slowly but steadily increasing in the last year, being more than 2% over the previous year. On the contrary, cable television experienced a decrease of 3.5% compared to 2014. Part of this decreasing trend is due to a rising supply of services such as Netflix, combined with rise in prices and steady reduction of some cable operators' services offer, with no price reduction (mainly Movistar, the biggest in Peru).

In early 2016, Movistar announced that it would introduce three new services for its users. First, Movistar Play, a service that

will offer a catalog of movies and TV shows for internet and mobile devices, which is expected to be a direct competition to Netflix. Another service to be offered in the near future will be the application Movistar soccer games, which will allow users to view data from national and international tournaments. And finally, Smartdeco, an accessory that will allow any TV to connect to internet. With these services, the Spanish company expects to expand its distinctive features with other cable and internet suppliers and revert, this way, the decrease of users.⁸

On the other side, webseries are still produced in Peru, with different results. In 2015, ten webseries were released, but only four of them exceeded over 15 chapters. Three of these productions stand out since they are sponsored and produced by large enterprises that somewhat use webseries to promote their products and services: *No Aguanto a Mis Hermanas* (sponsored by Cyzone and produced by a Chilean advertising enterprise), *Los Primerizos* (now releasing its first chapters, produced by Sodimac) and *Perfectos Imperfectos* (sponsored by an enterprise offering wedding planning services). *Los Cinéfilos* is also remarkable, which has been produced since 2013 and has more than 64 chapters, being one of the longest webseries produced in Peru.

1.7. Public TV

After three years producing the seasons of miniseries *Conversando con la Luna*, TV Perú decided to show a *telenovela* directly related to the social memory: *Nuestra Historia*. This short *telenovela*, co-produced with the same talents of *Conversando con la Luna*, told the story of different characters along almost two decades (since the end of the 1960s until the beginning of the 1980s), relating their experiences to important moments of the Peruvian history. The result obtained with this product has taken the public

⁸ According to Osiptel, the regulatory institution of telecommunication services, Telefónica brings together the largest number of unsatisfied users among the telecommunication enterprises.

channel to continue the story, which started broadcasting in February 2016.

On the other hand, TV Perú has decided to transform one of its four digital signals into a youth channel where fiction is not necessarily a priority, reinforcing the idea of TV Perú as a station with informative and cultural contents.

1.8. Pay TV

Pay TV (or cable TV, as it is known in Peru) offers little change in terms of Peruvian channels, in comparison to what television sets can receive from an open signal, either VHF or UHF bands, and from digital television signal. There are very few exclusive Peruvian cable channels offered, and most of them broadcast news and cultural programs, as it was already discussed in previous reports.

1.9. Independent producers

The trend of the last decade continued in Peru, where television stations are not the only fiction producers. There are now also several independent production companies that create contents for some stations or offer their products to different stations. It is difficult for an independent producer to make a fiction if it does not have at least one co-production station that sponsors most of the expenses. In 2015, 8 out of 12 fiction titles broadcast have been produced by independent companies, being Del Barrio Producciones the most productive one more time. In 2015, Imizu suffered a setback concerning the number of productions broadcast in Peru, mainly because of Latina's reorganization – the station for whom they produced most of their work – and also because Latina decided to broadcast Turkish *telenovelas*, with great success. Panamericana Televisión began to broadcast national fiction titles produced by independent producers, but they did not have much success with the audience.

1.10. International trends

América Televisión is the television enterprise that has reinforced most its links with other Ibero-American companies. In 2015, América Televisión announced the co-production of series *El Regreso de Lucas*, with Telefe, from Argentina. By the end of that year, they announced the remake of successful *Colorina*, with Televisa's approval.

Meanwhile, independent producer Imizu, associated to Spaniard enterprise Secuoya in 2014, made two fictions in 2015 (*telenovela De Millonario a Mendigo* and series *Acusados*), but, as previously indicated, Latina decided not to broadcast any of them in order to prioritize the successful Turkish *telenovelas*. In the same way, the fiction project *Gabriela*, presented by Imizu to Latina, stayed in "stand-by" and with no specific date of production, although series *Ramírez* (made in 2012) was broadcast by América Televisión, which bought it from Telefe.

In short, 2015 has showed that, in relation to content, changes have been made because of the presence of Turkish *telenovelas*, which brought consequences for national fiction production: some projects were postponed and other formats were produced. Concerning to organization, the most important changes were made at the end of 2015 and at the beginning of the following year, when enterprises decided to join forces to produce television products and, especially, to distribute them to different screens.

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

Table 1. Fiction broadcast in 2015 (national and foreign; premieres and reruns; and co-productions)

<p>PREMIERE NATIONAL TITLES – 12</p>	<p>3. <i>El Chapulín Colorado</i> (series – Mexico)</p>
<p>América Televisión – 7 national titles</p>	<p>4. <i>El Chavo del Ocho</i> (series – Mexico)</p>
<p>1. <i>Al Fondo Hay Sitio</i> – 7th season (soap opera)</p>	<p>5. <i>La Familia Peluche</i> (series – Mexico)</p>
<p>2. <i>Amor de Madre</i> (telenovela)</p>	<p>6. <i>La Madrasta</i> (telenovela – Mexico)</p>
<p>3. <i>Locura de Amor</i> (series)</p>	<p>7. <i>La Reina de las Carretillas</i> (miniseries – Peru)</p>
<p>4. <i>Pulseras Rojas</i> (miniseries)</p>	<p>8. <i>La Rosa de Guadalupe</i> (series – Mexico)</p>
<p>5. <i>Ramírez</i> (series)</p>	<p>9. <i>La Usurpadora</i> (telenovela – Mexico)</p>
<p>6. <i>Solamente Milagros</i> – 4th season (series)</p>	<p>10. <i>Mari Mar</i> (telenovela – Mexico)</p>
<p>7. <i>Ven Baila Quinceañera</i> (telenovela)</p>	<p>11. <i>María la del Barrio</i> (telenovela – Mexico)</p>
<p>Latina – 2 national titles</p>	<p>12. <i>Mariana de la Noche</i> (telenovela – Mexico)</p>
<p>8. <i>La Paisana Jacinta</i> (series)</p>	<p>13. <i>Yo no Me Llamo Natacha</i> (miniseries – Peru)</p>
<p>9. <i>Somos Family</i> (miniseries)</p>	<p>ATV – 9 foreign titles</p>
<p>Panamericana Televisión – 2 national titles</p>	<p>14. <i>A Cada Quien Su Santo</i> (series – Mexico)</p>
<p>10. <i>Relatos Para No Dormir</i> (miniseries)</p>	<p>15. <i>Al Límite</i> (series – Argentina)</p>
<p>11. <i>Un Solo Camino</i> (series)</p>	<p>16. <i>Criminal</i> (miniseries – Colombia)</p>
<p>TV Perú – 1 national title</p>	<p>17. <i>Lo que Callamos las Mujeres</i> (series – Mexico)</p>
<p>12. <i>Nuestra Historia</i> (telenovela)</p>	<p>18. <i>Mujeres Asesinas</i> (series – Argentina)</p>
<p>CO-PRODUCTIONS – 0</p>	<p>19. <i>Sangre Fría</i> (miniseries – Argentina)</p>
<p>PREMIERE FOREIGN TITLES – 44</p>	<p>20. <i>Señora del Destino</i> (telenovela – Brazil)</p>
<p>América Televisión – 15 foreign titles</p>	<p>21. <i>Séptima Puerta</i> (series – Colombia)</p>
<p>13. <i>A que no Me Dejas</i> (telenovela – Mexico)</p>	<p>22. <i>Sin Retorno</i> (series – Colombia)</p>
<p>14. <i>Amor de Barrio</i> (telenovela – Mexico)</p>	<p>Latina – 4 national titles; 8 foreign titles</p>
<p>15. <i>Amores con Trampa</i> (telenovela – Mexico)</p>	<p>23. <i>Confesiones</i> (series – Peru)</p>
<p>16. <i>Hasta el Fin del Mundo Te Amaré</i> (telenovela – Mexico)</p>	<p>24. <i>Corazón en Condominio</i> (telenovela – Mexico)</p>
<p>17. <i>La Gata</i> (telenovela – Mexico)</p>	<p>25. <i>Divino Niño</i> (miniseries – Colombia)</p>
<p>18. <i>La Malquerida</i> (telenovela – Mexico)</p>	<p>26. <i>El Joel de la Leyenda</i> (telenovela – Colombia)</p>
<p>19. <i>La Sombra del Pasado</i> (telenovela – Mexico)</p>	<p>27. <i>El Rey David</i> (miniseries – Brazil)</p>
<p>20. <i>Lo Imperdonable</i> (telenovela – Mexico)</p>	<p>28. <i>Historias de la Virgen Morena</i> (miniseries – USA)</p>
	<p>29. <i>José de Egipto</i> (miniseries – Brazil)</p>
	<p>30. <i>La Paisana Jacinta</i> (series – Peru)</p>
	<p>31. <i>Pataclaun</i> (series – Peru)</p>

21. *Mi Corazón Es Tuyo* (telenovela – Mexico)
22. *Pasión y Poder* (telenovela – Mexico)
23. *Por Siempre Mi Amor* (telenovela – Mexico)
24. *Qué Pobres Tan Ricos* (telenovela – Mexico)
25. *Que Te Perdona Dios, Yo No* (telenovela – Mexico)
26. *Simplemente María* (telenovela – Mexico)
27. *Yo no Creo en los Hombres* (telenovela – Mexico)

ATV – 17 foreign titles

28. *Así en el Barrio Como en el Cielo* (telenovela – Mexico)
29. *Bajo el Mismo Cielo* (telenovela – USA)
30. *Cielo Rojo* (telenovela – Mexico)
31. *En Otra Piel* (telenovela – USA)
32. *Imperio* (telenovela – Brazil)
33. *La Guerrera* (telenovela – Brazil)
34. *La Sombra de Helena* (telenovela – Brazil)
35. *La Vida Es una Canción* (series – Mexico)
36. *Los Miserables* (telenovela – USA)
37. *Preciosa Perla* (telenovela – Brazil)
38. *Rastros de Mentiras* (telenovela – Brazil)
39. *Reina de Corazones* (telenovela – USA)
40. *Santa Diabla* (telenovela – USA)
41. *Siempre Tuya Acapulco* (telenovela – Mexico)
42. *Tierra de Reyes* (telenovela – USA)
43. *Uga Uga* (telenovela – Brazil)
44. *Vivir la Vida* (telenovela – Brazil)

Latina – 2 foreign titles

45. *Confidencial* (miniseries – Colombia)
46. *Mi Corazón Insiste* (telenovela – Mexico)

Panamericana Televisión – 7 foreign titles

47. *11-11: En Mi Cuadra Nada Cuadra* (series – Argentina)
48. *Milagros* (series – Ecuador)

32. *Pide un Milagro* (series – Peru)
33. *Terra Nostra* (telenovela – Brazil)
34. *Yo Soy Betty la Fea* (telenovela – Colombia)

Panamericana Televisión – 1 national title 2 foreign titles

35. *Dónde Diablos Está Umaña* (telenovela – Colombia)
36. *Esposos Pero Tramposos* (miniseries – Peru)
37. *Los Plateados* (telenovela – Mexico)

Red TV– 10 foreign titles

38. *Casados con Hijos* (series – Argentina)
39. *El Capo* (telenovela – Colombia)
40. *El Cartel de los Sapos* (telenovela – Colombia)
41. *El Cartel de los Sapos 2* (telenovela – Colombia)
42. *Hay Alguien Ahí* (series – Spain)
43. *La Niñera* (series – Argentina)
44. *La Ronca de Oro* (telenovela – Colombia)
45. *Lo que la Gente Cuenta* (series – Mexico)
46. *Pablo Escobar* (telenovela – Colombia)
47. *Una Maid en Manhattan* (telenovela – USA)

TV Perú – 3 national titles

48. *Conversando con la Luna 1* (series – Peru)
49. *Conversando con la Luna 2* (series – Peru)
50. *Conversando con la Luna 3* (series – Peru)

RERUN CO-PRODUCTIONS – 7

ATV – 6 co-productions

51. *Decisiones Adultos* (series – USA, Colombia, Mexico, Puerto Rico)
52. *Decisiones Extremas* (series – USA, Colombia)
53. *Decisiones Mujeres* (series – USA, Colombia)
54. *El Señor de los Cielos* (series – USA, Mexico, Colombia)

49. <i>Mujeres al Límite</i> (series – Colombia)	55. <i>El Señor de los Cielos 2</i> (series – USA, Mexico, Colombia)
50. <i>Perro Amor</i> (telenovela – USA)	56. <i>La Vida Es Así</i> (miniseries – USA, Mexico)
51. <i>Tres Familias</i> (series – Ecuador)	
52. <i>Vivir a Destiempo</i> (telenovela – Mexico)	
53. <i>Voces Anónimas</i> (docudrama – Uruguay)	
Red TV – 3 foreign titles	Panamericana Televisión – 1 co-production
54. <i>El Capo 2</i> (series – Colombia)	57. <i>María Rosa, Búscame una Esposa</i> (telenovela – Peru, Venezuela)
55. <i>Rafael Orozco, el Ídolo</i> (telenovela – Colombia)	TOTAL PREMIERE TITLES: 58
56. <i>Rosario Tijeras</i> (series – Colombia)	TOTAL RERUN TITLES: 57
	TOTAL BROADCAST TITLES: 115
PREMIERE CO-PRODUCTIONS – 2	
América Televisión – 1 co-production	
57. <i>Las Bandidas</i> (telenovela – Mexico, Venezuela)	
Panamericana Televisión – 1 co-production	
58. <i>La Diosa Coronada</i> (series – Colombia, USA)	

Source: Obitel Peru

The number of Ibero-American fiction titles shows a noticeable increase in comparison to previous years, although the decrease of national titles is obvious since they used to be 15 titles in average. As it has already been said, the fact of producing *telenovelas* instead of miniseries with few producer companies available results in a reduction of the number of titles, although the number of hours broadcast is slightly larger than the previous year, as we shall see in Table 4.

Past years' trend is also kept, in the sense of concentrating Mexican fictions with América Television and Brazilian fictions with ATV. Two elements shall be highlighted in this table. On one hand, Latina appears with only two imported fictions, because here we only take into account the Ibero-American fiction, so fictions from Turkey are put aside. On the other hand, it is interesting note that Red TV has more imported titles than in previous years, when it used to rerun fiction productions already aired on ATV.

Table 2. Premiere fiction in 2015: countries of origin

Country	Titles	%	Chapters/ episodes	%	Hours	%
NATIONAL (total)	12	20.7	456	12.9	420:00:00	11.9
OBITEL COUNTRIES (total)	46	79.3	3073	87.1	3102:30:00	88.1
NON OBITEL COUNTRIES (total)	0	0.0	0	0.0	0:00	0.0
Argentina	1	1.7	8	0.2	8:00:00	0.2
Brazil	7	12.1	501	14.2	553:30:00	15.7
Chile	0	0.0	0	0.0	0:00:00	0.0
Colombia	5	8.6	346	9.8	381:00:00	10.8
Ecuador	2	3.4	41	1.2	28:30:00	0.8
Spain	0	0.0	0	0.0	0:00:00	0.0
USA (Hispanic production)	7	12.1	394	11.2	530:30:00	15.1
Mexico	21	36.2	1702	48.2	1600:00:00	45.4
Peru	12	20.7	456	12.9	420:00:00	11.9
Portugal	0	0.0	0	0.0	0:00:00	0.0
Uruguay	1	1.7	1	0.0	1:00:00	0.0
Venezuela	0	0.0	0	0.0	0:00:00	0.0
TOTAL	58	100.0	3529	100.0	3522:30:00	100.0
National co-productions	0	0.0	0	0.0	0:00:00	0.0
Ibero-American co-productions	2	3.4	80	2.3	50:00:00	1.4

Source: Obitel Peru

Comparing the countries of origin now to the previous years, we can see a marked reduction of titles from other countries – except for Mexico – such as Brazil, Colombia and United States. This is because América Televisión continued its alliance with Mexico, whereas Latina and ATV changed their interest and Latina bet on the Turkish *telenovelas*, which turned out a great success. The number of co-productions also decreased, and most of them have been produced between Ibero-American countries and the United States, because of the same reasons we have already stated before.

Table 3. Co-productions

	Titles	Co-producer countries	Production houses	Format
Peru + Obitel countries	<i>Las Bandidas</i>	Venezuela, Mexico	Televen	<i>Telenovela</i>
	<i>La Diosa Coronada</i>	USA, Colombia	RTI Producciones for Caracol Televisión and Telemundo	<i>Telenovela</i>
TOTAL TITLES CO-PRODUCED WITH OBITEL COUNTRIES: 2				
Peru+ non Obitel countries	-	-	-	-
TOTAL TITLES CO-PRODUCTION WITH NON OBITEL COUNTRIES: 0				
Other Obitel countries + non Obitel countries	-	-	-	-
TOTAL TITLES CO-PRODUCED BY OTHER OBITEL COUNTRIES + NON OBITEL COUNTRIES: 0				
TOTAL CO-PRODUCTIONS: 2				

Source: Obitel Peru

As we pointed out previously, the number of hours broadcast is similar to the previous year (with a slight increase), despite the smaller number of titles, since productions in 2015 had more episodes, especially on the second half of the year. This results in benefits for the still fragile Peruvian television industry because longer stories mean a more stable production and a better resource management. In general terms, we can observe a notorious increase of the number of Ibero-American fiction hours broadcast in Peru, which is the highest in the last years, meaning an increase of 50% in relation to 2014. This is due not only to the increase of premiere titles, but also to the fact that those productions have lasted more than in previous years, besides the quite high number of rerun titles.

Table 4. Chapters/episodes and hours broadcast per time slots

Time slot	National			Ibero-American			Total					
	C/E	%	H	%	H	%	C/E	%	H			
Morning (6:00-12:00)	0	0.0	0:00:00	0.0	164	5.3	109:30:00	3.5	164	4.6	109:30:00	3.1
Afternoon (12:00-18:00)	5	1.1	29:00:00	6.9	1220	39.7	1429:00:00	45.3	1225	34.7	1458:00:00	40.8
Prime time (18:00-23:00)	450	98.7	390:00:00	92.9	1015	33.0	1038:30:00	32.9	1465	41.5	1428:30:00	40.0
Night (23:00-6:00)	1	0.2	1:00	0.2	674	21.9	575:30:00	18.3	675	19.1	576:30:00	16.1
Total	456	100.0	420:00:00	100.0	3073	100.0	3152:30:00	100.0	3529	100.0	3572:30:00	100.0

Source: Obitel Peru

Table 5. Formats of national and Ibero-American fiction

Format	National			Ibero-American								
	Titles	%	C/E	%	H	%	Titles	%	C/E	%	H	%
<i>Telenovela</i>	3	25.0	127	27.9	122:30:00	29.2	36	78.3	2730	88.8	2912:00:00	92.4
Series	5	41.7	72	15.8	59:30:00	14.2	8	17.4	342	11.1	239:30:00	7.6
Miniseries	3	25.0	44	9.6	44:00:00	10.5	1	2.2	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
<i>Unitario</i>	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	1	2.2	1	0.0	1:00:00	0.0
Others (soap opera. etc.)	1	8.3	213	46.7	194:00:00	46.2	0	0.0	0	0.0	0:00:00	0.0
Total	12	100.0	456	100.0	420:00:00	100.0	46	100.0	3073	100.0	3152:30:00	100.0

Source: Obitel Peru

The most important format of the Ibero-American fiction continues to be the *telenovela*, since almost 80% of the productions broadcast use this format. In Peru, the *telenovela* has also returned. In the previous yearbook, we pointed out a slow disappearance of the Peruvian *telenovela* – none was produced in 2014 –, however, in 2015, three *telenovelas* and a soap opera were produced, and at least three new *telenovelas* would premiere in 2016. In the Peruvian case, it means to return confidence to the longest story, a format that has been part of the Latin American identity. Unfortunately, this return is more related to market reasons than to an understanding of what the *telenovela* means for the national audience, and there is always a risk that, if there is a failure with this format, the trend would revert.

Table 6. Formats of national fiction per time slot

Formats	Morn- ing	%	After- noon	%	Prime time	%	Night	%	To- tal	%
<i>Telenovela</i>	0	0.0	0	0.0	3	27.3	0	0.0	3	25.0
Series	0	0.0	0	0.0	4	36.4	1	100.0	5	41.7
Miniseries	0	0.0	0	0.0	3	27.3	0	0.0	3	25.0
Telefilm	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
<i>Unitario</i>	0	0.0	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	0	0.0
Others (soap opera, etc.)	0	0.0	0	0.0	1	9.1	0	0.0	1	8.3
Total	0	0.0	0	0.0	11	100.0	1	100.0	12	100.0

Source: Obitel Peru

Ibero-American fiction has dominated *prime time* in Peru, and even more when it comes to national fiction. In 2015, more than in previous years, almost all national productions were broadcast during the most important time slot of television, which shows channels' confidence on a product having the audience's response. The main change is made in the afternoon, when no premiere Peruvian fiction was broadcast, as it was made in previous years.⁹

⁹ Although in Table 4 we can see broadcast hours in the afternoon slot, they correspond to some chapters of series *Ramírez*, but it was later changed to another time slot.

Table 7. Time period in which fiction is set

Time period	Titles	%
Present	12	100.0
Period	0	0.0
Historical	0	0.0
Other	0	0.0
Total	12	100.0

Source: Obitel Peru

Premiere fiction has been set in the present, although there are still some products related to the social memory. The facts that contextualize fiction with real events were also quite contemporary, avoiding this way the greater costs when a more distant period of time has to be produced.

Table 8. The ten most watched titles: origin, rating, share

	Title	Country of original idea or script	Production company (country)	Network	Scriptwriter or author of original idea	Rating	Share
1	<i>Al Fondo Hay Sitio</i> (7th season)	Peru	América Televisión (Peru)	América Televisión	Efraín Aguilar, Gigio Aranda	24.4	35.5
2	<i>Amor de Madre</i>	Peru	Del Barrio Producciones (Peru)	América Televisión	Víctor Falcón, Eduardo Adrianzén	23.5	33.0
3	<i>Ven Baila Quinceañera</i>	Peru	PRO TV Producciones (Peru)	América Televisión	Guillermo Aranda, Luis del Prado, Cinthia Mckenzie, Jose Luis Valera	21.8	34.9
4	<i>La Gata</i>	Mexico	Televisa (Mexico)	América Televisión	María Antonieta Calú	21.4	31.1
5	<i>Locura de Amor</i>	Peru	Del Barrio Producciones (Peru)	América Televisión	Rita Solf	21.2	32.8
6	<i>Pulseras Rojas</i>	Peru	Del Barrio Producciones (Peru)	América Televisión	Albert Espinosa	19.1	28.3

7	<i>Pasión y Poder</i>	Mexico	Televisa (Mexico)	América Televisión	Ximena Suárez	17.1	26.5
8	<i>Lo Imperdonable</i>	Mexico	Televisa (Mexico)	América Televisión	Ximena Suárez	15.8	23.0
9	<i>Solamente Milagros</i> (4th season)	Peru	América Televisión (Peru)	América Televisión	Ana Lucía Roeder	13.0	27.9
10	<i>La Guerrera</i>	Brazil	Globo (Brazil)	ATV	Glória Perez	12.2	18.1
Total productions: 10				Foreign scripts: 4			
100%				60%			

Source: Obitel Peru – Kantar Ibope Media

Table 9. The ten most watched titles: format, length, time slot

	Title	Format	Genre	Number of chap/ ep. (in 2015)	Dates of first and last broadcast (in 2015)	Time slot
1	<i>Al Fondo Hay Sitio</i> (7th season)	Soap opera	Comedy	194	03/02/15-12/01/15	Prime time
2	<i>Amor de Madre</i>	<i>Telenovela</i>	Drama	75	08/10/15-11/20/15	Prime time
3	<i>Ven Baila Quinceañera</i>	<i>Telenovela</i>	Comedy	21	12/02/15-cont. in 2016	Prime time
4	<i>La Gata</i>	<i>Telenovela</i>	Drama	79	01/02/15-04/24/15	Prime time
5	<i>Locura de Amor</i>	Series	Comedy	35	01/02/15-02/12/7/5	Prime time
6	<i>Pulseras Rojas</i>	Miniseries	Drama	15	04/27/15-05/15/15	Prime time
7	<i>Pasión y Poder</i>	<i>Telenovela</i>	Drama	27	11/23/15-cont. in 2016	Prime time
8	<i>Lo Imperdonable</i>	<i>Telenovela</i>	Drama	125	05/18/15-11/06/15	Prime time
9	<i>Solamente Milagros</i> (4th season)	Series	Drama	10	01/01/15-01/16/15	Prime time
10	<i>La Guerrera</i>	<i>Telenovela</i>	Drama	24	01/01/15-02/03/15	Prime time

Source: Obitel Peru – Kantar Ibope Media

The complete supremacy of América Televisión can be seen in the previous tables, since almost all top ten Ibero-American productions were broadcast by this station, except for one aired by ATV. Like the previous year, productions providing audience success to América Televisión have been national or Mexican. However, we

must be careful when reading this table because only the premiere Ibero-American fiction is taken into consideration. As mentioned before, Turkish *telenovelas* had a good reception, and three of them were among the ten most watched fictions in Peru. Moreover, it is important to mention that *La Guerrera* occupied position 16 among fictions and it is number 43 in the general programming (including non-fiction). In Table 8, it appears in the tenth position because only Ibero-American fiction is considered, but other four Turkish *telenovelas* are on better positions, and all the productions from that country were among the 25 fictions with the highest level of audience. Likewise, there were two reruns with more audience than that Brazilian fiction, but they were not published in the table because it only considers premiere fiction. In this way, although the Brazilian *telenovela* obtains at least a position among the ten most watched fictions, in fact, it has ended in a very low position this year, which indicates a preference of the Peruvian audience for more classical melodramatic stories, which, in this case, count on exotic scenarios and are located in different realities.

Table 10. Themes in the ten most watched titles

	Titles	Prevailing themes	Social themes
1	<i>Al Fondo Hay Sitio</i> (7th season)	Social climbing, infidelity, family relations, romance.	Racism, migration.
2	<i>Amor de Madre</i>	Deception, betrayal, maternity, sabotage, romance.	Entrepreneurship, discrimination.
3	<i>Ven Baila Quinceañera</i>	Friendship, young romance, 15th birthday party.	Social differences.
4	<i>La Gata</i>	Romance, revenge	Discrimination, poverty.
5	<i>Locura de Amor</i>	Romance, work conflicts.	Family values.
6	<i>Pulseras Rojas</i>	Disease, friendship.	Family values, health rights.
7	<i>Pasión y Poder</i>	Deception, feud, infidelity, betrayal.	Gender-based violence.
8	<i>Lo Imperdonable</i>	Romance, revenge, deception.	Discrimination.
9	<i>Solamente Milagros</i> (4th season)	Home, family, religion.	Family values, corruption, drugs.
10	<i>La Guerrera</i>	Freedom, justice, love, family, maternity.	Trafficking in women, prostitution.

Source: Obitel Peru – Kantar Ibope Media

**Table 11. Audience profile of the ten most watched titles:
gender, age, socioeconomic status**

	Titles	Network	Gender %		Socioeconomic status %		
			Women	Men	AB	C	DE
1	<i>Al Fondo Hay Sitio</i> (7th season)	América Televisión	60.1	39.9	15.0	35.6	49.4
2	<i>Amor de Madre</i>	América Televisión	60.5	39.5	13.3	37.6	49.2
3	<i>Ven Baila Quinceañera</i>	América Televisión	64.2	35.8	12.4	37.6	50.0
4	<i>La Gata</i>	América Televisión	61.1	38.9	11.2	34.6	54.2
5	<i>Locura de Amor</i>	América Televisión	61.5	38.5	12.2	37.8	50.1
6	<i>Pulseras Rojas</i>	América Televisión	61.7	38.3	12.5	36.4	51.2
7	<i>Pasión y Poder</i>	América Televisión	63.5	36.5	12.9	36.0	51.2
8	<i>Lo Imperdonable</i>	América Televisión	60.6	39.4	10.4	35.7	53.9
9	<i>Solamente Milagros</i> (4th season)	América Televisión	65.8	34.2	13.0	36.4	50.6
10	<i>La Guerrera</i>	ATV	66.2	33.8	18.8	43.5	37.6

Source: Kantar Ibope Media

	Title	Network	Age groups %					
			3-10	11-17	18-25	26-37	38-49	50+
1	<i>Al Fondo Hay Sitio</i> (7th season)	América Televisión	16.4	14.5	12.9	20.0	14.9	21.3
2	<i>Amor de Madre</i>	América Televisión	15.5	14.5	15.0	21.1	14.8	19.0
3	<i>Ven Baila Quinceañera</i>	América Televisión	18.1	15.6	15.8	18.2	14.1	18.2
4	<i>La Gata</i>	América Televisión	15.8	13.9	11.4	19.7	15.4	23.9
5	<i>Locura de Amor</i>	América Televisión	17.8	15.8	13.7	19.6	13.7	19.4
6	<i>Pulseras Rojas</i>	América Televisión	18.0	17.3	13.6	19.9	13.6	17.5
7	<i>Pasión y Poder</i>	América Televisión	16.0	11.3	16.0	20.9	15.1	20.7
8	<i>Lo Imperdonable</i>	América Televisión	14.7	13.9	14.7	21.8	14.7	20.2
9	<i>Solamente Milagros</i> (4th season)	América Televisión	17.6	14.6	15.0	20.4	13.3	19.1
10	<i>La Guerrera</i>	ATV	8.9	10.9	12.1	19.9	13.1	35.2

Source: Kantar Ibope Media

While this year we see a greater diversity of audience, there is still the idea that fiction continues to be a product consumed mostly by adult female audiences, especially in the case of the most classical melodramas and where religiosity is the main topic. In the case of fictions containing a dose of humor, numbers are more dispersed and there is more presence of other age groups and male viewers. Like in previous years, Brazilian fiction has a higher audience in upper classes and within the elderly.

In short, a recovery of fiction is observed in Peruvian screens. In 2015, there was more screen time occupied by fiction, and these productions occupied the most important time slots of television. The national and Mexican fiction broadcast by América Televisión obtained the highest preference of the audience, but we cannot avoid considering that Turkish *telenovelas* also occupied high levels of preference.

3. Transmedia reception

In the previous *Obitel Yearbook*, we have already presented, in this same section, the implementation of some requisites and practices that would enable, in a gradual way, the introduction of transmedia expansions from some television channels observed in the Peruvian case. However, there are some precisions to be made. First, as it is evident, the main transmedia experiences have been offered from the stations with the highest levels of audience, América Televisión and Latina (see Graph 1 in this chapter). Second, since this initiative is official, the transmedia proposals do not let a greater range of action to these productions' followers, other than the one controlled and allowed by themselves. Third, the transmediation offered has not been linked exclusively to fictions. Another kind of audiovisual products has also used it in offering a new or alternative space to the audiences.

Considering all these precisions, the case of América Televisión has been the most interesting in relation to transmedia expansions. A first case is referred to soap opera *Al Fondo Hay Sitio*. Since

its internet platform, something that cannot be seen on television, which is the traditional means to watch *telenovelas*. On the other hand, when showing a different plot development broadcast through this means, an unprecedented segment of the story broadens, enriching and turning it into an expansion, independently of its short duration. Along with “Seamos Amigos”, these are the most important incursions that América Televisión had regarding transmediation during 2015.

The other great case is Latina’s. At the beginning of 2015, *Somos Family*, within its promotion strategy among viewers, invited them to participate in a contest for the creation of a video where the followers had to record themselves imitating the peculiar dance step of Pepe Swing, who was the main character of *Somos Family*. Such a video had to be sent to the channel and also shared at Latina’s website. Here we present the viewers’ participation in the creation of content related to fiction, but with a different plot development. Within certain limits, this kind of involvement means a contribution from the audience, which, although emerging, intends to obtain a material benefit, by letting shaping up the *prosumer* disposition of the viewers and that could be explored further in other kinds of fiction.

Although the case of *Somos Family* is important in Latina, there is another kind of expansion we were referring to at the beginning, which was also described in the Obitel Yearbook 2015 and, despite not being linked directly to fiction, provides us something else than the television transmission offers. Like América Televisión in 2014, Latina dedicated to promote its mobile application and reinforced that way the reception in live of some of its contents on these second screens. This resource, named by Latina as Dual, does not only broadcast in live the channel’s programming but also, during the commercial break, provides differentiated and exclusive content from the studios where information and competition contents are held.

Two important topics about Dual: depending on the program, the television signal is not repeated, necessarily, but it is shown on a

multiscreen together with other views related to the program. On the other hand, an official Dual presenter was chosen in order to provide it independence in relation to the channel broadcasting as well as an exclusive content created through the interaction with presenters, guests or participants.

Unlikely the expansion from Dual, the viewers' *prosumer* conditions were reflected in two outstanding actions. One of them is related to the ludic recreation of a group of school students in a Peruvian version of the format *El Último Pasajero*, made with a cell phone's camera, shared on the web and collected by this program. The second action has to do with the creation of two ironic video clips created by using images taken from *reality game shows* in Latina and América Televisión. In both cases, a more delicate work concerning the editing and the musical part was evident, but making clear the process of appropriation, elaboration and broadcasting from the viewers through the official channels.

A similar case to the Dual's was presented by Panamericana Televisión when incorporating the benefits of the Periscope application to the transmission of the midday TV news. It shows the interaction of presenters from a camera site which is different to the one seen on the television. Also, this new point of view is kept during the commercial breaks from the set and facilitates the comments among the users of this application.

The transmedia panorama concerning the rest of channels monitored in the Peruvian case is practically nonexistent and there are not clear actions or proposals yet – neither in fiction nor in non-fiction programs. The activity from the web is restricted only to social nets, but in an irregular way.

As it was highlighted in the previous *Obitel Yearbook, 2015* has let open the action field to transmedia proposals. This has served for learning not only at the official level, but also at the level of the audiences. It is good to clarify that there is really an advantage when expanding the stories to other platforms different to television, and how to do those expansions is still a pending task of Peruvian televi-

sion. At least, the first steps are becoming evident and the panorama seems to be more positive.

4. Highlights of the year

In previous yearbooks, we had seen how Peruvian fiction seemed to be losing ground in front of reality programs, where participants developed stories and situations that were similar to a classical melodrama. In a similar way, fiction production chose shorter formats, such as miniseries, series or other products, leaving behind the production of *telenovelas* until 2014, when none was produced (except for the long-term project *Al Fondo Hay Sitio*, that released its seventh season this year and that, as we stated, is no longer a *telenovela*, but a soap opera).

As previously indicated, Latina's bet to broadcast Turkish *telenovelas*, following the success they have obtained in Chile and in other countries, and copying the same broadcasting strategy, meant a great movement in the audience, in several channels programming and in the fiction production in Peru, mainly in América Televisión, a TV station that, as repeated in every yearbook, is the greatest engine that moves Peruvian fiction production.

Latina premiered at prime time Turkish *telenovela* *Las Mil y Una Noches* on February 9th, and during the first week it broadcast chapters lasting an hour and a half, without commercial breaks. It was programmed just after a successful contest program (carrying its audience), placing the *telenovela* in competition with news programs from other channels and in the period when *Al Fondo Hay Sitio* was not on air because of the production team's yearly break.

This strategy enabled the channel to take possession of a good part of the audience, and soon the channel began a constant strategy of schedule changes, making the *telenovela* begin before, or on the announced schedule, or later, fighting directly with the programming changes the other channels made in order to counteract the success of *Las Mil y Una Noches*. This strategy of continuous schedule changes became cleverer when, in May, Latina premieres *¿Qué*

Culpa Tiene Fatmagül? and broadcasts both *telenovelas*, one after the other, but sometimes giving more time to one or the other, creating what they called “the Turkish *telenovela* block”, which lasted from 8:30 p.m. to 11:30 p.m. in some cases. Also in May, although in the afternoon, Latina premieres its third Turkish *telenovela*, *Rosa Negra*, getting some success with the audience, despite the less sponsored time slot. The other stations’ answer was diverse. ATV maintained its Brazilian *telenovelas* at prime time and premiered a *telenovela* for youngsters in the afternoon, while Panamericana Televisión purchased and broadcast a Romanian *telenovela* and later an Indian one, but the strategy did not work for any of the two stations. América Televisión, on the contrary, announced the purchase of some Turkish *telenovelas* and premiered *Sila, Cautiva por Amor* in August, some weeks before the final chapter of *Las Mil y Una Noches* (broadcast as a special play lasting two hours, on a Sunday, which is totally new in Peru¹⁰). With *Sila...*, América Televisión recovered part of the audience Latina had attracted and reorganized its priorities. Instead of beginning with the production of miniseries, América focused its production on *telenovelas*. Del Barrio Producciones, which has produced the most successful miniseries for América Televisión in the last years, produced *Amor de Madre*, premiered in August, and has a list of other two *telenovelas* to be premiered in 2016. Likewise, ProTV produced for América Televisión *Ven Baila Quinceañera*, a *telenovela* premiered in December 2015, and promised a second season in 2016. We must say that *Ven Baila Quinceañera* counted with the acting – in secondary roles – of some contestants from the most successful *reality show* of América Televisión. These productions, together with *Al Fondo Hay Sitio*, enabled América Televisión to recover the first places of national reception.

¹⁰ This strategy is identical to the one used in Chile, where the final chapter was also aired on Sunday. The intriguing advertising strategy appealed, on one side, to the female audience (“What would you be able to do for your son?”) and, on the other, on the male audience (“How much would you pay to be with a woman?”), and they were also the same strategies used in Chile.

Latina's¹¹ strategy and América Televisión's reaction made 2015 a year of changes that could become a turning point in the Peruvian television. To start with, the return to bet on longer stories. Besides the ones already mentioned, we have to consider that TV Perú also left behind its five-chapter stories and produced the 80-chapter *telenovela Nuestra Historia*, which has a new season in 2016. At the same time, we must say that the return to *telenovelas* has meant also the return to certain topics and styles.

In previous yearbooks we highlighted how Peruvian fiction showed winds of change, stories with new topics, more egalitarian characters, more motivating relationships among the characters and showing the values Peruvians are identified with. In 2015, the *telenovelas* have more classic stories and look, features of the most suffered melodrama, moving away from the newer and fresher proposals of previous years. Some productions América Televisión had programmed, with different topics, were left behind to prioritize more classic stories.

On the other hand, also in previous yearbooks, we noted that the production companies did not have enough capacity to face several productions at a time and increase, this way, the number of fictions on the national screen. In the case of Del Barrio, when they started focusing on the production of a *telenovela*, they had to leave behind other projects, which turned out in less national fiction titles produced by the end of the year. On the contrary, as indicated in items 1.9 and 1.10, Latina's success with Turkish *telenovelas* meant the cancellation or no broadcasting of fictions produced by national companies, like Imizu. In this way, at the end of 2015, seven fictions from Turkey were exhibited while Peruvian productions only got to be 12. This is a quite high relation if we consider that in the previous year none Turkish production had been broadcast in the Peruvian television.

¹¹ In 2015, Latina also premiered *Amor Prohibido* and *El Secreto de Ferihá*. Meanwhile, América Televisión never premiered *El Sultán*, and in 2016 it transferred this Turkish *telenovela* to its new ally, ATV, which started the broadcasting in February at prime time.

The return of the *telenovela* also coincides with América Televisión's announcement of building five new TV studios in a large piece of land in the south of Lima (more than 53 thousand square meters). This is an investment of more than 33 million dollars that will enable them to produce a variety of entertainment products, among them, fiction programs.

It is also interesting to observe how fictions have had an approach to the Peruvian social memory in the last two years. In the miniseries produced in 2014 and the *telenovelas* from 2015, there is a trend to place contextualized stories for historical facts, which reflect what life has been in the country at certain time: the war with Chile, the soccer team in the Berlin Olympic Games, the military government, the internal war, etc. It is important to point out that, for 2016, stories about historic characters are announced, as a preparation for the Independence bicentennial, in the same style as docudrama *Grau*, produced in 2014, where the life of the most renowned Peruvian hero was told.

In short, we cannot avoid saying that, although production and mainly Peruvian *telenovela* have been the answer to Turkish fictions, they have taken away space and audience of productions from other parts of Ibero-America, mainly Brazil and Mexico (even though the last one still has good presence, it has given some programming space to Turkish fictions). In previous years, the most watched fictions in Peru were national or Mexican, with some presence from Brazil, Colombia and the United States. The audience numbers in 2015 show that the most watched productions were national, Turkish, and some Mexicans – in a lower number than in previous years though. Brazilian fictions appear very low in the rating levels, and productions from other origins do not appear among the 30 most viewed fictions, where all the Turkish do appear this year.

5. Theme of the year: (re)invention of TV fiction genres and formats¹²

As we previously observed, Peruvian television is highly changeable, very reactive in front of the market dynamics and the audience's expectations. Progress and setbacks of the industry are explained because of political changes, economic crisis and links with the government in charge.

In this new century, Peruvian television has had to face strong challenges concerning our own narratives as a country – as audiovisual industry and market, as an offer from the media or as content developer –, but also in front of the new technological challenges: multiplicity and convergence of screens, content digital platforms, transmedia narratives and new production strategies. It is translated into the changes and transformations of the Peruvian television industry: new productions and producer companies – as it was mentioned in previous paragraphs –, changes in the ownership of television media, new competency strategies with the market growth of pay TV and other screens – closure and opening of stories with direct continuity, superposition of narratives and formats, hybridization processes –, changes in the legal normative of communication media in Peru, and especially a long process for leaving behind the image of a communication means captured by the political power of the last decade in the 20th century.

All of this means adaptations in the way we narrate, adjustments in your own television stories and products, which are translated into a greater number of annual titles in fiction and new program formats. But it also tells us about the transformations in the social, political and economic structures of the country, since television is a cultural way wrapped in processes of social meaning that involve relations, dialogues and tensions in the forms of social production and reproduction (Martín-Barbero, 1993).

¹² It is part of a research that has been carried out by the Peruvian Audiovisual Observatory in Peru. This research aims to identify – in a historical dimension – the changes of the television industry in the country.

As pointed out in the first part of this chapter, one of the greatest changes of the Peruvian television industry has been the strategic alliances made between Latina and Panamericana Televisión and the one made between América Televisión and ATV. The ones who were competitors in the past establish, at present time, commercial relations that mean – among other things – sharing programming and screen, besides the possibility of co-production and common offer in global markets.

While genres and formats offered by Peruvian television are changing, they live together with traditional ways of television reading and consumption, including screen and TV guides interrupted by commercial breaks, since the great Peruvian audience continues consuming open signal television. In Peru, social television of Manjoo (in Piñón, 2015), defined by the possibility of interactivity and construction of a community by the use of social nets, lives together with traditional television, the one referred to passive consumption in front of the TV set. There is mobility to other screens, but the ritual character of the television, of being every day in front of the TV within home, still prevails, although the stories are in process of transformation. Mirta Varela (1998:2) points out that “a means of communication shapes, from a cultural point of view, a particular complex stage in which representations and ways of appropriations are mixed where there is tension between the new and the old, the traditional and the modern, the self and the others”. Peruvian television industry and the producers themselves refer to their products as serial *telenovelas*, miniseries in seasons or mini-*telenovelas*.

In order to illustrate these changes, we are going to analyze the story of *Mi Amor, el Wachimán*. This product was initially offered as a miniseries of melodramatic genre – that is to say, a story supported in the love story of people from different social levels who undergo a multiple number of obstacles in order to find love fulfillment –, but, at the end, it became a three season miniseries/series. The open endings of the first two seasons made Salvador and Catalina love

story last three seasons, after superimposing the love story to police and narconovela narrative axes.

Thus, the characters and topics become complex and the narrative possibilities become multiple. With the purpose of creating class and identity conflicts, and as a narrative strategy to build the characters, there are also other superimposed dimensions, such as gender identities and gender relations: the female character that is more engaged with her own stories, her desire and personal development, and the male character, more equitable and emotional, with identities in transit towards more equalitarian ways of masculinity. Love relations “are not ways of social rise, they are established as ways of identity affirmation where love overpasses barriers and prejudices of Peruvian society” (Orozco and Vassallo, 2013:412). Work is incorporated as an important dimension of personal development that lives together with the most traditional family topics, parental relations and essential affiliations. The characters go through different narrative possibilities along the story. Salvador is a good young man, trustful and kind. Since the beginning of the story, he learns to recognize the bad skills, betrayal and low passions of a lot of people surrounding him. Finally, he matures professionally and gets emotionally involved. Catalina, the young heroine, learns to recognize evil inside her own family, recognizes her parents’ imperfections, lives in isolation, learning to manage evil around her and becomes a woman with her own decision and will. The encountered feelings of the characters and their selfishness are shown in different dimensions of the story. In this sense, we are in front of a more realistic story, a less dreamy story.

This realism is also showed in the intersectionality of social structures that the story offers: gender, different social classes and different ethnicities. Conflicts are supported by the combination of those structures. And the ethnic dimension occupies a privileged place.

But there are changes not only at the narration level but also at the level of production, where we can see some of the most distinc-

tive features of our industry, which have been reinforced through the time. In Peru, at the beginning of the 1970s, the means of communication were expropriated – TV channels included. In the 1980s – with the return of democracy – the means of communication were given back to their owners. Peruvian television had lost an important decade for its development, in front of the economic breakdown of the television industry, lack of technicians, age of equipment and poor infrastructure; then, channels that had bet on producing fiction changed their way of doing it. Thus, fiction recordings went out of the television studios to be produced on location, but this way of recording was constituted with hybrid traits. In other words, in Peru, fiction is recorded on location with several cameras, maintaining, additionally, one or two flying cameras that definitely record. Then, all this material is edited and post-produced. At present, it has been recorded and edited in HD.

One of the consequences of this historic process of production is also the introduction of independent producer companies in the 1980s and 1990s, such as Cinetel, MGZ, América producciones and Capitán Pérez, among others – although some of these are linked to television channels: the case of Cinetel with Panamericana TV or América Producciones with América TV. In the 1990s, television as a means of communication suffered the political capture of Alberto Fujimori's government. After the fall of the dictatorship, many of the old broadcasters had to face trials and imprisonment for corruption, and some channels changed their ownership. In that period, independent producer companies increased, which are the ones that produce the highest number of Peruvian television fictions at present time. One of them – Del Barrio Producciones – produces *Mi Amor, el Wachimán*. The story of this production goes back to the year 2005, when they produced *Dina Paucar, la Lucha por un Sueño*, their first television success, including ratings achieving 40 points. The production company counts on producers and scriptwriters with a long presence in the Peruvian television industry, who share their experience with young communicators. While at the beginning of

its own story Del Barrio Producciones produced stories to different enterprises, at present they are exclusively made for América TV, which invests in and bets in these productions, broadcasting them at prime time. In the case of *Mi Amor, el Wachimán*, the producer company knew how to relate to the use of social networks, taking the story to other platforms.¹³ Nowadays, with the return to *telenovelas*, the challenge may be the coexistence of more classic genres and formats with a television in process of change, with new technological possibilities, new markets and new audiences.

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¹³ The Peruvian chapters may be reviewed in the Obitel Yearbooks 2013, 2014 and 2015 in order to go in depth concerning the social networks and *Mi Amor, el Wachimán*.

PORTUGAL: *TELENOVELA*, A CORE PRODUCT
FOR FREE-TO-AIR NETWORKS

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1. Portugal's audiovisual context in 2015

In 2015, the production and offering of national fiction, namely the *telenovela* format, which completely occupies the prime time slot in free-to-air channels, remained the same. This core product has been presenting an increasingly complex dramatic structure, as well as different types of simultaneous stories, thus creating more dynamic and appealing content, which is able to nationally compete with foreign products. The storylines and the amount of both main and recurring characters are exponentially increased. There are more elaborate plots and less obvious relationships. At the same time, the comedy and melodrama genres are beginning to exist side by side with other genres that are not usually worked into *telenovelas*, such as the police thriller and the mystery, which contribute to acquire a more diversified audience. Some examples are titles such as *Mar Salgado*, *Coração d'Ouro* (SIC), *Única Mulher* or *Santa Bárbara* (TVI), programs that are on the top ten for 2015. In order to strengthen this structure, the authors rely on the exploration of themes related to the everyday lives of the Portuguese and present in the media provided by national news outlets, thus enabling a product offering filled with realism and believability.

1.1. Open television in Portugal

Chart 1. National open television networks in Portugal

PUBLIC	PRIVATE
RTP1	SIC
RTP2	TVI

When the analogue signal was turned off in 2012, it was assumed that there would be an increased offering of open signal channels. In January, 2013, Canal Parlamento was added to the existing channels – RTP1, RTP2, SIC and TVI. However, the offering stopped here and Portugal is still at the bottom in Europe regarding this matter.

Chart 2. Viewership per channel (share)

Station	Share (%)
RTP1	14.8
RTP2	2
SIC	18.7
TVI	22.5
Cable TV	31.1

The four generalist channels registered a reduced market share in 2015 compared to that of the previous year. TVI was still the preferred channel by the Portuguese (22.5% share in 2015 and 23.5% in the previous year), followed by SIC (18.7% in 2015, 19.1% in 2014) and RTP1 (14.8% in 2015, 15.6% in the previous year). RTP2 registered a 2% share in 2015, which was one decimal point less than in 2014. These numbers can be explained by an increase in subscription channels, a tendency which has been noted since a few years ago. Therefore, the bulk of the cable channels registered a share of 31.1% in 2015 and 29.3% in the previous year.

Chart 3. Genres offered on TV

Broadcast genres	Hours of airtime	%
Art and culture	94:12:17	0.3
General interest/knowledge	2850:45:36	0.8
Sports	770:19:16	3.4

Variety shows	311:27:27	1.2
Entertainment	6764:53:07	3.6
Fiction	6594:58:59	3.9
News	7280:34:00	3.3
Young audience	3005:18:25	0.5
Others	20:32:32	4.3
Advertisement	2003:40:53	0.2

In 2015, the emphasis goes to the accomplishment of a financial equilibrium by the public service channel RTP as an outcome of the strategy that was defined by the newly appointed Board in the beginning of the year. Some of the employed initiatives involved turning to in-house production, reducing outsourcing, improving labor and union relations and turning to a bank association for financing, as well as reinforcing the fictional production by hiring actor Virgílio Castelo to consult in the programming Board when appraising scripts and new projects.

In terms of the content offering and ensuing fight for ratings by the three main channels (RTP1, SIC and TVI), the year was marked by the continuing presence of the prime time *telenovela*, with an uninterrupted premiere of shows, and by the live Sunday night broadcast of big entertainment formats. These facts are in keeping with the audience preferences in terms of genres: fiction (3.9%) and entertainment (3.6%). Also noteworthy are the on-line platforms, the availability of streaming and on-demand content – either within the official sites or YouTube channels – and the use of augmented reality graphics during the national elections as ways to grab the viewer’s attention. Lastly, it should be noted that negotiations were made between the networks, the channels and the major national teams regarding the broadcast rights for the football matches.

1.2. Audience trends in 2015

Subscription channels have been gaining viewership from the open signal generalist channels. The failure of digital terrestrial television led to the viewers migrating to cable operators in order to

have access to the channels that should supposedly be freely available. By the end of the second quarter of 2015, according to data provided by Anacom, there were around 3.43 million subscribers of subscription TV (STV), which was 36 thousand more (+1.1%) than the preceding quarter and 183 thousand more (+5.6%) than the same period in the previous year. The service growth was mostly due to the fiber-based offerings (FTTH/FTTB), which showed an increase of 6.6% in subscribers when compared with the previous quarter and a 30.1% increase from the same period in the previous year.

The Board resignation in RTP in December 2014 was proposed by the Independent General Council (CGI, in Portuguese) and enacted by minister Poiares Maduro after the purchase of transmission rights to the Champions League games. This led to a heated controversy between the CGI and the Board still in office, led by Alberto da Ponte. The new Board took office in the beginning of the year, in January 2015. The changes in strategy were immediately announced as a way for the new Board to distance itself from the programming created by its predecessors, which was built around a free form schedule format in order to renew audiences. The resigning Board had invested in large international entertainment formats, such as *Got Talent* and *The Voice*, and long-running national fiction to meet popular appeal. However, despite the differences announced by the new Board and programming direction, there was no substantial change in the schedule for RTP1 and the large entertainment formats continued. In fiction, lunch time soap opera *Os Nossos Dias* was renewed for a second season and prime time series *Bem-Vindos a Beirais* was extended and had its finale at 640 episodes, making it the longest running product in Portuguese television. However, due to the lack of a fixed schedule, the ratings for this show dropped. RTP2, which invested in children programming during the day and in European series in the evening, became immaterial, as it registered a daily share below 2% and was surpassed by the subscription channels every day. Nevertheless, despite the apparent immobility, the new Board made a call for content bidding and began negotia-

tions with independent producing companies for new series. RTP continued to support cinema through the Audiovisual and Cinema Institute, which led to changing film *Os Maias* – an adaptation of the book by Eça de Queiroz, directed by João Botelho – into a miniseries in two episodes, aired in December 2015.

SIC relied on its partnership with SP Televisão to ensure the production of fiction and with Brazilian network Globo to supply other content that would fill programming fringes outside prime time. This network also strengthened their offering of national fiction by replacing the second evening show, which was traditionally Brazilian in origin, by a national one. TVI, the only national network to have a production company within their media conglomerate, kept their strategy of relying on reality shows and national *telenovelas* for their programming, even if, at times, resorting to adapted scripts, as was the case of *Mulheres* and *Santa Barbara*. The former show was nominated for the International Emmy Awards, despite its modest ratings at premiere, which resulted in pushing the show into late night.

The counter programming strategies in the private networks have led to the management of the daily airtime in *telenovelas*, thus ignoring the dramatic structure of the episode hooks. Even though this strategy has consequences in the viewer perception of the work, it is effective in terms of ratings, as the network that goes into commercial break later is able to come ahead in the ratings.

Therefore, it is clear that the year has not seen any surprises in programming, with RTP extending the fiction products that were aired during the previous year and SIC and TVI exclusively maintaining their investment in *telenovelas* as a remedy to postpone a more dramatic drop in ratings in favor of the subscription channels.

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

In 2015, the advertisement investment grew 3.5%, which was in keeping with the overall growth in the sector. Another national tendency that accompanied the overall trend was the growth of the

investment in the digital format, with an increase of around 30% when compared with the previous year. This format now represents 20% of the entire market, which is still led by television at 52%. Product placement or soft sponsoring in television fiction remained as an accessory strategy to traditional advertisement.

1.4. Merchandising and social merchandising

“Half the money I spend on advertising is wasted. The trouble is I don’t know which half.” The quotation is by John Wanamaker, one of the founders of marketing, and was reportedly said in the beginning of the 20th century, but it remains accurate and depicts the current concerns that brands show regarding the effectiveness of the campaigns. New watching patterns that are increasingly free from flow (live broadcasting) and scheduling structured by programming directors are starting to have an impact on the advertisement market. However, despite the changes seen in the last few years, conventional advertisement still has a strong impact in viewers, therefore the investment remains. Due to the possibilities that the “time shift” allows, other models have been gaining relevance, and the soft sponsoring being ever more an alternative way to promote products. One of the advantages of presenting brands within fiction is the ability to create a level of emotional involvement.

Data gathered by Markttest (Soft Sponsoring Monitor/Media-monitor) show that between January and September 2015 brands were exhibited in seven programs – *Água de Mar* (RTP), *Mar Salgado*, *Poderosas*, *Coração d’Ouro* (SIC), *A Única Mulher*, *Jardins Proibidos*, *Mulheres* (TVI) – with particular emphasis to *Mar Salgado* (SIC), with 31% of the total investment, an hour of brand exposition and a growing brand remembrance throughout the months of airing of the *telenovela*.

In keeping with this, cable operator NOS developed a virtual product placement method by introducing brands in post-production, starting with *Crossing Lines*, a show airing on AXN. This was a ground breaking process in Portugal.

As for merchandising products, there never was a commercial exploration of fiction, with the exception of some *telenovelas* geared towards the teenage audience. These have been off air for several years and the time slot that segues into prime time has been taken by game shows, foreign fiction and reality shows. The traditional investment in soundtracks was also dropped by SIC, as opposed to the fiction products on TVI, since this station and music producer Farol belong to Media Capital group.

Regarding social merchandising, the year saw stories that shed light to domestic violence endured by women, both physically and psychologically. This was showcased in projects such as *Mulheres*, on TVI, and *Mar Salgado* and *Coração d'Ouro*, on SIC. Another prominent issue was racism, especially on *telenovela A Única Mulher*, which had a storyline based on a love plot between a Portuguese man and an Angolan woman, aimed at exposing old wounds that are still present between Europe and the ex-colonies in Africa. *Telenovela Coração d'Ouro* also touches on the subject, but from another angle, that of a multicultural couple who raises their children to be tolerant and aware of the importance of equality. Analyzing plots that may or may not constitute social merchandising is particularly difficult, since many of the events that occur within fiction, even if mostly touching relevant social matters, do not have a clearly defined educational purpose. Therefore, not every plot that focuses on cancer, abuse of power or corruption can be considered as entertainment education, since the main goal was not to change a mindset or to promote new attitudes, behaviors or social practices.

1.5. Communication policies

Apart from the aforementioned new Board taking office on RTP, the Office for the Media (GMCS, in Portuguese) was terminated. This institution was responsible since 2007 for giving support to the government in designing, executing and appraising public policy regarding the media. It is also important to note that Bill n. 78/2015 was passed into law on July 29th and regulates the trans-

parency of ownership, management and financing of entities that conduct activities in the media.

1.6. Information and Communication Technology (ICT) trends

The Portuguese Association for Communication Development (APDC, in Portuguese), being a public institution, divulged once more the results for IT in Portugal, based on a document issued by the International Data Corporation (IDC) for 2015. In this report¹, emphasis was given to the continued growth of the IT market in Portugal, which in the previous year had already reversed a five-year decline, constituting the largest historical crisis, by growing 1.3%. In 2015, the market reached 3.46 billion euros, or a growth of 0.9%, and this increase is set to accelerate in subsequent years, according to *IDC Predictions 2015*, which identifies large trends such as mobility, cloud services, network security, IoT, big data and analytics and internationalization.

Mobility is increasingly becoming the driving force for innovation in national corporations. Considering that the growth prospects for technology and mobile solutions in the global market should represent over 40% of the global market growth for IT, these trends apply to Portugal. The new consumer profile, which is more connected to digital and mobile platforms, and the changes in the work environment are creating an additional pressure on organizations to bring mobility to their business processes.

Regarding the use of social networks, in the study titled *Os portugueses e as redes sociais 2015*², Marktest stated that 94% of social network users have a Facebook account and 41% have a YouTube account (surpassing the position held by Google+ in the previous year). According to the same study, 23% of the interviewees left a social network during the last year. Additionally, 29% of interview-

¹ Retrieved on April 5, 2016 from http://www.apdc.pt/Artigo.aspx?channel_id=3430D560-04A5-432A-B893-3224E5CEFBB&content_id=285E958C-EF76-4F5C-A73D-1067F3E0584C&lang=pt.

² Retrieved on April 5, 2016 from http://www.marktest.com/wap/private/images/logos/Folheto_redes_sociais_2015.pdf.

ees use smartphones to access social networks between 6 p.m. and 8 p.m.; and 19% intend to dedicate less time to social networks in the coming year. The study also identifies that 69% of the interviewees follow brands within the social networks and 13%, two points over the previous year, consider that following or being a fan of a company or brand within social networks has a lot of influence in buying choices or TV consumption.

The data gathered for this study also revealed that Facebook is still the best known and most used social network in Portugal, seen among users as “the most reliable”, the one with “better information” and the “preferred” one, the one with “more useful information”, “the most interesting” and, therefore, the most “addictive”. However, even though Facebook remains at the top, YouTube has increasingly become the preferred social network in Portugal. This marks a clear transition from still images to video as a preference within social networks.

1.7. Public TV

After the paradigm shift that public television suffered in 2014, with a new direction and programming strategy, the network continued to elicit a heated public debate and the purpose of such an offering within the Portuguese media was once more put into question. In the end, RTP1 remained as the third out of four generalist channels in 2015, with a share of 14.8%, and was never able to break out of the bottom two positions in the list.³

In terms of innovation, RTP Play entered its final version in January 2015 and was the main focus and revelation for public television last year. As an application that stems out of the network’s main website, it provides access to all televised, digital and radio content for every public station. With RTP Play application, it is possible to follow live TV and radio broadcasts and watch full on-demand shows. On the other hand, in 2015, RTP was also the station

³ Retrieved on April 5, 2016 from <http://www.dn.pt/media/interior/audiencias-2015-quem-ganhou-e-quem-perdeu-4961462.html>.

with more complaints in the Regulating Entity for Social Communication (ERC, in Portuguese).

On RTP, the show with the largest amount of complaints in the ERC was *Prós e Contras*, with 70 claims. Out of these, 59 were related to the self-promotion of the show aired on September 14, which addressed the political interference in the judicial system. Similarly to the show, the debate over the network itself seems to be polarizing. What is the purpose of public television in Portugal and what role does it play in shaping the Portuguese media landscape? These were the issues raised by Portuguese viewers during 2015, which did not translate into an increase in ratings for the public station.

1.8. Pay TV

As previously stated, pay channels have seen their ratings increase, a fact that goes hand in hand with an increase in subscriptions. Data gathered in September 2015 shows that subscription TV grew 5.4%, even though subscriptions for premium channels dropped. The largest market share is still held by NOS, followed by MEO, Vodafone (which has registered the largest growth in recent years) and lastly Cabovisão. The two main operators have invested in developing content search and management solutions for television sets and tablets, as well as offering new channels and content. The highlights go to the launch of Reality, a TVI channel, and the broadcast of Brazilian show *Porta dos Fundos* on Fox Portugal. The latter was the first content on pay TV in Portuguese language.

Additionally, even though it was not a platform offered by the operators themselves, 2015 is the year when Netflix entered Portugal.

1.9. Independent producers

The Independent TV Producers Association (Apite, in Portuguese) was created in December 1996 as a means to protect the rights and interests of media producers by intervening and regulating the

sector. Currently, this association has the support of 22 producing companies that, together, represent 80% of the overall independent production business in Portugal. There are, however, over 200 production companies in Portugal, most of which are small businesses. The small number of production companies with an expressive turnover is mostly due to the small television market, which is merely made up of four free-to-air channels. This has severely limited the development of any significant scale industry or competitive media production. In the last two years, the possibility for an increased offer in digital terrestrial television channels started to be approached. The discussion was initiated by minister Poiares Maduro and would be addressed again in the Parliament when Bloco de Esquerda proposed a bill that would include RTP3 and RTP Memória in the open television offering. However, this proposal was already included in the government plan by PS. In face of this new outlook, SIC and TVI joined forces by stating that “not opening the airspace to private networks constitutes a ‘grave element of unfair market competition’”.⁴

The Apit and several of its supporters have publicly manifested themselves on the lack of legislation regarding the subscription channels, which are, for the most part, based overseas and have no obligation to produce in Portugal or in Portuguese. This has stunted the market growth, the ability for production companies to be competitive and professional specialization, as the four open signal channels are unable to secure a steady stream of work for content producers. However, despite the constrictions mentioned above, work has been done in order to ensure a national presence in the main international venues. *Mulheres*, by TVI, was a finalist for best telenovela in the International Emmy Awards, and *Coração d’Ouro* and *Mar Salgado* won the gold and bronze medals respectively in the New York Festivals International TV & Film Awards.

The Council of the Portuguese Diaspora, in conjunction with the President’s Office, resumed the debate over the importance of

⁴ Ribeiro, S. (2016, January 15). SIC e TVI consideram “abusiva” entrada de mais canais da RTP na TDT. *Jornal de Negócios*.

cultural and creative industries to the national economy. This issue had already been brought to light two years ago when the report *A cultura e a criatividade na internacionalização da economia portuguesa* was commissioned. This report was written by Augusto Mateus (2013) and showed that the average annual growth rate for cultural and creative exports had been over 10% in the last decade. The report concluded that:

the future of European economy, as well as that of the Portuguese economy, critically relies on each country's ability to respectively place culture, creativity and knowledge at the center of economic activities [...], which will create employment in Portuguese economy. It is a virtuous circle that starts from what we are strong at and turns us outward from within. We go into globalization with what we are (Mateus, 2013:10).

Pursuant to this, the increasing presence of national fiction titles in international venues is unsurprising.

1.10. International trends

During the MIP in October 2015, *Fresh TV Fiction* panel presented as this year's trend themes such as mystery, police thriller and supernatural. Out of the extensive list of genres, only one *telenovela* – *Coração d'Ouro* – was presented among these new international prospects for 2015. For many years, fiction exports were overwhelmingly coming out of the United States in terms of series and Brazil and Mexico in terms of *telenovelas*. However, the landscape has been shifting and new markets have been gaining prominence as exporters of fiction. In less than five years, Turkey has become one of the main exporters of *telenovelas*, both in-can (finished product) and format (script), while Nordic countries, such as

Sweden, or Middle Eastern countries, such as Israel, have earned a reputation as creators of new trends with series that would later be adapted to the American market. This was the case of *In Treatment*, *The Bridge*, *Homeland* and *The Killing*.

The international market has transformed and the periphery is now influencing the center. Fiction that had up until now been considered exclusionary is starting to coexist with content that used to be strictly local, but that, despite its peculiarities, became universal enough to travel to other territories. As Stuart Hall notes, “globalization (in the form of flexible specialization and ‘niche’ marketing) actually exploits local differentiation. Thus, instead of thinking of the global ‘replacing’ the local, it would be more accurate to think of a new articulation between ‘the global’ and ‘the local’” (Hall, 2005:77).

By strategically partnering with the Independent TV Producers Association and the Audiovisual and Cinema Institute, national stations were, for the first time, present at MIP in Cannes with a country showroom as a way to share expenses and improve visibility in the international market. According to data provided by the stations themselves, during 2015 RTP sold *Voo Directo* – a series which was co-produced with Angola – to Uganda, while SIC managed to export *Laços de Sangue* (in-can) to Angola, Macedonia, Georgia, Estonia, Italy, France and Ivory Coast; *Rosa Fogo* (in-can) to Reunion Islands, France, Madagascar, Guadalupe, Martinique and French Guiana; and *Perfeito Coração* (in-can) to Pakistan. Other negotiations may have been underway, but, according to the SIC’s International Sales Department, “the remaining sales for 2015 cannot be announced yet”. TVI was able to place its breakout *telenovela*, *Única Mulher*, in Angola, Mozambique and other non-Portuguese-speaking African countries, Cape Verde, Chile, Uruguay, Paraguay, El Salvador and France. The station was also able to sell two other *telenovelas*, *Doce Tentação* and *Jardins Proibidos*, to Angola and Mozambique as well as *Ilha dos Amores* format to Mexico.

As we can see, there were not many surprises in terms of national fiction on offer in 2015. RTP took advantage of the long-running formats, namely a series and a soap opera for secondary schedules (morning and afternoon), and the private channels continued to develop prime time *telenovelas* with two strips of fiction, adding up to four shows airing daily. Generally speaking, the advertisement investment was increased while, at the same time, venturing into product placement within the fictional storylines, thus contributing to reduced breaks and, consequently, minimizing zapping.

ITs grew in 2015, with Portugal appearing at the top of international lists for ownership, adoption and consumption through mobile devices. This led the television channels to invest on streaming applications to download episodes/chapters and news programs.

The presence of national content overseas was reinforced not only by the successful sales or by the individual and joint participation in international venues, such as MIP, but also by the nominations and awards that were achieved.

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

Table 1. Fiction broadcast in 2015 (national and foreign; premieres and reruns; and co-productions)

PREMIERE NATIONAL TITLES	RERUNS – 22
<p>RTP1 – 7 titles <i>Água a Sério</i> (sitcom) <i>Água de Mar</i> (telenovela) <i>Almas Penadas</i> (telefilm) <i>Bem-Vindos a Beirais</i> (series) <i>De Mal a Pior</i> (sitcom) <i>Os Nossos Dias</i> (soap opera) <i>Virados do Avesso</i> (miniseries)</p>	<p>RTP1 – 13 titles <i>A Ferreirinha</i> (series) <i>A Mulher do Sr. Ministro</i> (sitcom) <i>A Sagrada Família</i> (sitcom) <i>Depois do Adeus</i> (series) <i>Hotel 5 Estrelas</i> (sitcom) <i>Maternidade</i> (series) <i>Mulheres de Abril</i> (miniseries) <i>Os Compadres</i> (series) <i>Sinais de Vida</i> (series) <i>Tempo Final</i> (series) <i>Um Lugar para Viver</i> (sitcom) <i>Velhos Amigos</i> (series) <i>Voo Directo</i> (series)</p>
<p>SIC – 2 titles <i>Coração d'Ouro</i> (telenovela) <i>Poderosas</i> (telenovela)</p>	

<p>TVI – 5 titles <i>A Única Mulher (telenovela)</i> <i>I Love It (youth telenovela)</i> <i>Jardins Proibidos (telenovela)</i> <i>Mulheres (telenovela)</i> <i>Santa Bárbara (telenovela)</i></p> <p>CO-PRODUCTIONS – 1</p> <p>SIC – 1 title <i>Mar Salgado (telenovela – Portugal/Brazil)</i></p> <p>PREMIERE FOREIGN TITLES – 9</p> <p>SIC – 9 titles <i>Alto Astral (telenovela – Brazil)</i> <i>A Regra do Jogo (telenovela – Brazil)</i> <i>Babilónia (telenovela – Brazil)</i> <i>Dupla Identidade (series – Brazil)</i> <i>Império (telenovela – Brazil)</i> <i>Lado a Lado (telenovela – Brazil)</i> <i>O Canto da Sereia (miniseries – Brazil)</i> <i>O Caçador (series – Brazil)</i> <i>Violetta (series – Argentina)</i></p>	<p>SIC – 5 titles <i>Dancin’ Days (telenovela)</i> <i>Jura (telenovela)</i> <i>O Crime do Padre Amaro (miniseries)</i> <i>Podia Acabar o Mundo (telenovela)</i> <i>Uma Aventura (series)</i></p> <p>TVI – 4 titles <i>Campeões e Detectives (series)</i> <i>Mundo Meu (telenovela)</i> <i>O Teu Olhar (telenovela)</i> <i>Olhos de Água (telenovela)</i></p> <p>TOTAL PREMIERE TITLES: 26 TOTAL RERUNS: 22</p>
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Similarly to previous years, there are more rerun than premiere titles. For the most part, these are aired during prime time, while the remaining content makes up the rest of the schedule.

Table 2. Premiere fiction in 2015: countries of origin

Country	Titles	%	Chapters/ episodes	%	Hours	%
NATIONAL (total)	15	62.5	1885	67.0	1381:55:00	65.9
OBITEL COUNTRIES (total)	9	37.5	928	33.0	714:10:00	34.1
NON OBITEL COUNTRIES (total)	0	0.0	0	0.0	00:00:00	0.0
Argentina	1	4.2	233	8.3	00:00:00	0.0
Brazil	8	33.3	695	24.7	00:00:00	0.0
Chile	0	0.0	0	0.0	00:00:00	0.0
Colombia	0	0.0	0	0.0	00:00:00	0.0
Ecuador	0	0.0	0	0.0	00:00:00	0.0

Spain	0	0.0	0	0.0	00:00:00	0.0
USA (Hispanic production)	0	0.0	0	0.0	00:00:00	0.0
Mexico	0	0.0	0	0.0	00:00:00	0.0
Peru	0	0.0	0	0.0	00:00:00	0.0
Portugal	15	62.5	0	0.0	00:00:00	0.0
Uruguay	0	0.0	0	0.0	00:00:00	0.0
Venezuela	0	0.0	0	0.0	00:00:00	0.0
TOTAL	24	100.0	2813	100.0	2096:05:00	100.0
National co-productions	0	0.0	0	0.0	00:00:00	0.0
Ibero-American co-productions	1	100.0	234	100.0	194:50:00	100.0

Source: Obitel Portugal. Caem/Mediamonitor MMW/Telereport

In 2015, 15 national fiction titles were aired, two less than in 2014. RTP1 produced seven, TVI produced five and SIC, three, which changed the ranking for the previous year, where TVI placed first. The public station invested on format diversity with a different take on series, thus overtaking the private channels in terms of number of titles. Nevertheless, the overall number of produced and aired hours as well as the number of chapters/episodes was superior to that of 2014, particularly due to the continued offering of prime time *telenovela* formats, airing five to six days a week throughout the year. The remaining nine titles are, for the most part, Brazilian in origin (*telenovelas* by Globo) and aired by SIC, which still has an exclusive deal with the network. Only one title is Argentinian – *Violetta* – and is aimed at younger audiences. It is dubbed in Portuguese and aired during the morning slot.

Table 3. Co-productions

Co-productions	Titles	Co-producer countries	Production companies
Portugal + Obitel countries	<i>Mar Salgado</i>	Portugal	SIC/SP Televisão
		Brazil	Globo
TOTAL TITLES CO-PRODUCED WITH OBITEL COUNTRIES: 1			
Portugal + non Obitel countries			

TOTAL TITLES CO-PRODUCED WITH NON OBITEL COUNTRIES: 0			
Other Obitel countries + Obitel countries			
TOTAL TITLES CO-PRODUCED AMONG OBITEL COUNTRIES TOTAL: 0			
Other Obitel countries + non Obitel countries			
TOTAL TITLES CO-PRODUCED BY OBITEL COUNTRIES + NON OBITEL COUNTRIES: 0			
TOTAL CO-PRODUCTIONS: 1			

Source: Obitel Portugal

Telenovela Mar Salgado, which reached the first spot in the top ten, was the only co-production in 2015. Following *Laços de Sangue* and *Dancin' Days*, SIC and Globo joined forces for a third time to create a television title.

Prime time remains as the slot of choice for domestic fiction to be aired. As opposed to other countries, Portuguese television uses subtitles for foreign content. This results in the slot with the biggest amount of viewers available for consumption exclusively airing content in Portuguese on both sides of the Atlantic Ocean. Even though Ibero-American content fills the morning and the afternoon slots, Portuguese content airs more expressively during the afternoon slot, particularly during the so-called access to prime time and on weekends. The content for younger audiences is then relegated to the morning slot.

Table 4. Chapters/episodes and hours broadcast per time slot

Time slot	National			Ibero-American			Total					
	C/E	%	H	C/E	%	H	C/E	%	H			
Morning (06:00-12:59)	58	3.1	32:10:00	2.3	233	25.1	222:25:00	31.1	291	10.3	254:35:00	12.1
Afternoon (13:00-19:59)	249	13.2	193:30:00	14.0	325	35.0	211:15:00	29.6	574	20.4	404:45:00	19.3
Prime time (20:00-23:59)	1576	83.6	1155:00:00	83.6	370	39.9	280:30:00	39.3	1946	69.2	1435:30:00	68.5
Night (24:00-05:59)	2	0.1	01:15:00	0.1	0	0.0	00:00:00	0.0	2	0.1	01:15:00	0.1
Total	1885	100.0	1381:55:00	100.0	928	100.0	714:10:00	100.0	2813	100.0	2096:05:00	100.0

Source: Obitel Portugal. Caem/Mediamonitor MMW/Teleport

Table 5. Formats of national and Ibero-American fiction

Format	National			Ibero-American		
	Titles	%	H	Titles	%	H
<i>Telenovela</i>	8	53.3	1166:20:00	5	55.6	473:45:00
Series	2	13.3	187:40:00	3	33.3	237:00:00
Miniseries	1	6.7	01:50:00	1	11.1	03:25:00
Telefilm	1	6.7	01:25:00	0	0.0	00:00:00
<i>Unitario</i>	0	0.0	00:00:00	0	0.0	00:00:00
Soap opera	1	6.7	14:20:00	0	0.0	00:00:00
Sitcom	2	13.3	10:20:00	0	0.0	00:00:00
Total	15	100.0	1381:55:00	9	100.0	714:10:00

Source: Obitel Portugal. Caem/Mediamonitor MMW/Teleport

Telenovela is still the format of choice, both in national productions (eight titles) and Ibero-American shows (five titles). Notwithstanding, there was an interest in diversifying content by venturing into other formats, such as series, miniseries, telefilms and sitcoms, with particular emphasis given to the public station, which developed the soap opera format with *Nossos Dias* and accomplished a strategy of differentiation from the private channels.

Table 6. Formats of national fiction per time slot

Format	Morn- ing	%	After- noon	%	Prime time	%	Night	%	To- tal	%
<i>Telenovela</i>	0	0.0	0	0.0	8	80.0	0	0.0	8	53.3
Series	1	50.0	0	0.0	1	10.0	0	0.0	2	13.3
Miniseries	0	0.0	0	0.0	1	10.0	0	0.0	1	6.7
Telefilm	0	0.0	0	0.0	0	0.0	1	50.0	1	6.7
<i>Unitario</i>	0	0.0	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	0	0.0
Soap opera	0	0.0	1	100.0	0	0.0	0	0.0	1	6.7
Sitcom	1	50.0	0	0.0	0	0.0	1	50.0	2	13.3
Total	2	100.0	1	100.0	10	100.0	2	100.0	15	100.0

Source: Obitel Portugal. Caem/Mediamonitor MMW/Telereport

By comparing formats with time slots, we can see that *telenovelas* are exclusively aired during prime time. The remaining formats are dispersed throughout other time slots in order to fill the schedule. It should be noted that the afternoon slot in RTP1 is used to air its soap opera, thus setting itself apart from the offering in the private channels, which relies on live entertainment content.

Table 7. Time period in which fiction is set

Time period	Titles	%
Present	15	100.0
Period	0	0.0
Historical	0	0.0
Others	0	0.0
Total	15	100.0

Source: Obitel Portugal

In 2015 there were no reports on historical or period drama productions. This shows a clear preference towards stories based on present times and closer to the everyday lives of audiences.

Table 8. The ten most watched titles: origin, rating, share

	Title	Country of original idea or script	Producer	Channel	Scriptwriter or author of original idea	Rating	Share
1	<i>Mar Salgado</i>	Portugal	SP Televisão	SIC	Inês Gomes	15.3	31.8
2	<i>Única Mulher</i>	Portugal	Plural Entertainment	TVI	Maria João Mira, André Ramalho	14.2	29.6
3	<i>Coração d'Ouro</i>	Portugal	SP Televisão	SIC	Pedro Lopes	13.5	28.2
4	<i>Jardins Proibidos</i>	Portugal	Plural Entertainment	TVI	Manuel Arouca, Tomás Múrias, António Barreira	11.2	28.8
5	<i>Santa Bárbara</i>	Mexico	Plural Entertainment	TVI	Victor Carrasco, adapted by Artur Ribeiro	9.8	26.3
6	<i>Poderosas</i>	Portugal	SP Televisão	SIC	Patrícia Muller, Pedro Lopes	8.7	21.6
7	<i>Mulheres</i>	Columbia	Plural Entertainment	TVI	Raquel Palermo, Eduarda Maia	6.8	24.2
8	<i>Bem-Vindos a Beirais</i>	Portugal	SP Televisão	RTP	Collective work	6.3	12.9
9	<i>Água de Mar (telenovela)</i>	Portugal	Coral Europa	RTP	Raquel Palermo, Vera Sacramento	4.0	8.2
10	<i>Nossos Dias</i>	Portugal	SP Televisão	RTP	Collective work	3.3	17.4
Total productions: 10				Foreign scripts: 2			
100%				20%			

Source: Obitel Portugal

Similarly to what can be seen in the top ten for the previous year, the market trend for Portugal points towards the majority of fiction formats being originally from Portugal (80%), as shown in Table 8. From the selected top ten, eight are original and two are remakes of Latin American *telenovelas*: *Santa Bárbara*, adapted

from Mexican format *La Patrona*, a Mexican-American *telenovela* aired in 2013 by Telemundo, and *Mulheres*, an adaptation of Colombian *telenovela* *El Último Matrimonio Feliz*, which was written by Adriana Suárez and Pedro Miguel Roza and produced by RCN Televisión.

Contrary to the trends seen in 2013 and 2014, the top spots in the ranking for 2015 were interchangeably taken by *telenovelas* aired on SIC and TVI. However, SIC maintained its first spot in the top ten, as in previous years. Still, TVI remains as the channel with more shows on air in 2015 (four), but lost the leadership that it had for over a decade.

It is worth highlighting that, unlike previous years, RTP invested in the *telenovela* format with two titles and secured the three bottom spots in the list, thus gaining ground in the Portuguese fiction market.

Table 9. The ten most watched titles: format, length, time slot

	Title	Format	Genre	Number of chap./ ep. (in 2015)	First and last broadcast (in 2015)	Time slot
1	<i>Mar Salgado</i>	<i>Telenovela</i>	Melodrama	225	01/01-09/18	Prime time
2	<i>Única Mulher</i>	<i>Telenovela</i>	Melodrama	255	03/15-airing now	Prime time
3	<i>Coração d'Ouro</i>	<i>Telenovela</i>	Melodrama	80	09/07-airing now	Prime time
4	<i>Jardins Proibidos</i>	<i>Telenovela</i>	Melodrama	201	01/01-10/02	Prime time
5	<i>Santa Bárbara</i>	<i>Telenovela</i>	Melodrama	67	09/28-airing now	Prime time
6	<i>Poderosas</i>	<i>Telenovela</i>	Melodrama	163	05/18-airing now	Prime time
7	<i>Mulheres</i>	<i>Telenovela</i>	Melodrama	151	01/01-09/26	Prime time
8	<i>Bem-Vindos a Beirais</i>	Series	Family comedy	260	01/01-12/30	Prime time
9	<i>Água de Mar (telenovela)</i>	<i>Telenovela</i>	Teen drama	46	01/01-05/20	Prime time
10	<i>Nossos Dias</i>	<i>Telenovela</i>	Melodrama	188	04/07-airing now	Day time

Source: Obitel Portugal

Table 9 shows that, according to previous trends, the melodrama genre is still the most used in dramatizations in Portugal, even if some of these may be considered hybrids. Comedy still figures as the second favorite genre for national productions. It is worth noting that 2015 saw a break from the exclusive use of *telenovelas* for prime time, as RTP chose to set itself apart from existing conventions and air *Nossos Dias* at lunch time.

In 2015, the productions on SIC and TVI continued with the strategy that had already been adopted in the previous year: bumping the *telenovela* that has a longer run forward in the programming, regardless of the ratings reached, thus giving more emphasis to the *telenovela* premiering at the 9:30 p.m. slot.

Table 10. Themes in the ten most watched titles

	Title	Predominant themes	Social themes
1	<i>Mar Salgado</i>	Revenge, love triangle, family relationships, daughter separated at birth, blackmail.	Regionalism, emigration and immigration, representation of women's role.
2	<i>Única Mulher</i>	Conflict between two families, reality check, revenge, power struggle.	Racism, class struggle, Angola's independence, returning expat syndrome.
3	<i>Coração d'Ouro</i>	Power struggle, business, inheritance claims, family relations.	Regionalism.
4	<i>Jardins Proibidos</i>	Sequel of a previous <i>telenovela</i> , love affairs, family turmoil, class conflicts.	Conflict caused by inheritance (will).
5	<i>Santa Bárbara</i>	Labor issues, faith, story of individual achievement and strength of the main character, search for lost love, conspiracy and revenge.	Miners' issues, labor issues.
6	<i>Poderosas</i>	Revenge story of three women that join forces to punish a man, conflict between revenge and love, family relations, power struggle.	
7	<i>Mulheres</i>	Love affairs, labor relations, love gained and lost, mistrust, class conflicts.	Gender equality, fight against breast cancer.
8	<i>Bem-Vindos a Beirais</i>	Revenge, love affairs.	Economic crisis, emigration and immigration, delinquency, regionalism.
9	<i>Água de Mar (telenovela)</i>	Love triangle involving two brothers and a woman.	Male and female homosexuality.

10	<i>Nossos Dias</i>	Unemployment, struggle to find housing, the need to emigrate to look for work.	New forms of employment, alternative living arrangements, increasing relevance of innovation and business acumen.
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Source: Obitel Portugal. Caem/Mediamonitor MMW/Telereport

Similarly to previous years, the majority of national productions in 2015 focused on recurrent themes that are recreated under the same melodramatic basis, which essentially relies on stories of revenge, power struggle, love gained and lost, love triangles, family relations and illnesses, as can be seen in Table 10.

During 2015, social themes that have the viewer connected to the drama were still used. Some of the most explored themes by the top ten titles for this purpose were the financial crisis, new forms of employment and the hardships inherent to migration movements.

Table 11. Audience profile of the ten most watched titles: gender, age, socioeconomic status

Title	Channel	Gender		Age group							
		Women	Men	4-14	15-24	25-34	35-44	45-54	55-64	65-74	+75
1 <i>Mar Salgado</i>	SIC	61.0	39.0	6.9	5.7	9.0	14.0	17.4	16.8	16.5	13.7
2 <i>Única Mulher</i>	TVI	60.7	39.3	8.9	9.0	9.4	13.3	16.2	15.6	15.2	12.3
3 <i>Coração d'Ouro</i>	SIC	61.6	38.4	6.5	5.3	9.6	15.2	15.2	17.7	17.6	13.0
4 <i>Jardins Proibidos</i>	TVI	62.6	37.4	7.0	8.8	10.1	12.6	15.9	18.1	15.8	11.6
5 <i>Santa Bárbara</i>	TVI	61.3	38.7	6.2	8.3	10.2	13.8	16.6	19.3	15.9	9.8
6 <i>Poderosas</i>	SIC	62.6	37.4	6.1	5.5	12.1	16.4	16.4	14.8	17.1	11.6
7 <i>Mulheres</i>	TVI	63.7	36.3	6.3	9.2	11.4	13.0	14.0	18.2	16.9	11.0
8 <i>Bem-Vindos a Beirais</i>	RTP	53.4	46.6	5.4	4.4	3.7	8.2	14.9	18.7	21.4	23.3
9 <i>Água de Mar (telenovela)</i>	RTP	55.0	45.0	3.7	3.7	4.2	7.1	13.2	18.7	19.2	30.2
10 <i>Nossos Dias</i>	RTP	61.3	38.7	2.1	2.9	3.2	5.0	9.0	15.6	28.2	34.1

	Title	Channel	Socioeconomic status				
			A	B	C	D	E
1	<i>Mar Salgado</i>	SIC	3.7	10.1	15.5	40.0	30.6
2	<i>Única Mulher</i>	TVI	1.7	10.4	15.0	43.7	29.2
3	<i>Coração d'Ouro</i>	SIC	3.2	11.3	16.0	41.1	28.4
4	<i>Jardins Proibidos</i>	TVI	2.2	9.6	11.0	45.4	31.8
5	<i>Santa Bárbara</i>	TVI	1.6	8.9	14.2	42.8	32.5
6	<i>Poderosas</i>	SIC	2.5	12.2	17.6	40.2	27.5
7	<i>Mulheres</i>	TVI	0.9	9.0	11.9	44.0	34.2
8	<i>Bem-Vindos a Beirais</i>	RTP	2.7	9.1	15.9	45.2	27.1
9	<i>Água de Mar (telenovela)</i>	RTP	2.4	10.6	12.0	43.0	31.9
10	<i>Nossos Dias</i>	RTP	1.2	7.5	16.3	46.7	28.4

Classifying the audience profile for the ten most watched shows, we concluded that women are still ahead of men in terms of viewership gender. However, the percentages between men and women are increasingly closer to each other, suggesting that more men are watching fiction each year. Additionally, Table 11 shows that the age groups that watch *telenovelas* the most are in the 45 to 75 segment.

Regarding socioeconomic status, similarly to the previous year, the differences vary not only from one fiction to the next but also from one station to the other. Most viewers within segments A and B lean towards fictions aired by SIC, while watchers in segments C and D prefer TVI. However, viewers from bracket D are the ones that watch *telenovelas* the most, regardless of station.

3. Transmedia reception

Portugal has an offering of four generalist channels for a population of over ten million people. Even though the media field is relatively small, its on-line presence has followed a variety of approaches in the services and contents made available over the internet by the Portuguese generalist TV stations. Currently, the weight of fiction in Portuguese programming results in dramas being the most sought after on the on-line platforms for every generalist channel in Portugal (Cardoso, 2006). Therefore, we must think of interactivity as a key element in defining the current television-based fiction model.

Television is inserted within a setting of globalized digital convergence and is increasingly guided by the emergence of cultural forms based on a set of media. This idea that content is able to be transferred from one platform to the next is shared by Jenkins and Fechine (apud Lopes, 2009:404), giving as an example television shows and *telenovelas* that are “adapted” onto the internet. This new production and drama consumption scheme invariably promotes new communication and socialization spaces.

The current phenomenon takes on other shapes, since fiction producers themselves are crossing the televised broadcasting barrier by developing additional content and adding to the complexity of the drama on other platforms that are more portable, mobile and interactive. These can be geared towards the same audiences as well as new ones. According to Jenkins (2003), the incentive for these interactive connections to be made bears the potential to create a new consumption culture.

On the other hand, there is a current need among fiction productions to engage with viewers by a wide range of media in the attempt to attract and lead them to interaction with the dramas on multiple platforms. As each of these changes, there is an added complexity to the drama and the story takes on a new shape – the “transmedia narratives” (Lopes, 2009:395). It is this interactive participation process that transforms the story into a form of “transmedia storytelling”, where a narrative jumps from one medium into another by using different platforms, different languages and at a speed only made possible by the digital communication technologies (Jenkins, 2003).

By taking this definition as a basis for analyzing transmedia fictional products in Portugal in 2015, we can see that the above-mentioned increased complexity in the narrative did not occur in the aired *telenovelas*. When using the definition of “transmedia reception” by Jenkins (2003), it is important to note that in Portugal there has not been established a true transmedia strategy, since what was chosen when creating new content on other communication plat-

forms falls more under the scope of marketing rather than storytelling.

What could actually be observed last year was the continuation of a strategy that had already been adopted in previous years: the official page for a given *telenovela* or the social networks related to it merely reinforce the narrative presented on television or promote the aired episodes. This strategy cannot be considered transmedia, since, according to the definition by Jenkins (2003), it does not add value to the narrative, does not create new characters or content that is specific to the communication platform. Therefore, it is not possible to make a transmedia analysis for any *telenovela* aired in 2015 in Portugal.

4. Highlights of the year

The choice for the most noteworthy work of the year was not directly related to its position in the ranking of the most watched shows, but had to do with other factors that led to it setting itself apart from the remaining fictions. TVI's *telenovela Única Mulher* paved the way to a new business model by having a simultaneous premiere in Portugal and Angola. The storyline, which is set in both countries concurrently and presents actors of both nationalities, was conceived as a show that would work on the European and African market equally well, despite the chance of having differing receptions due to the historical past. The plot of forbidden love between a Portuguese man and an Angolan woman initially insisted on a profoundly racist portrayal of the Portuguese characters, who were mostly weak in character and values and contrasted with the Angolan characters. However, this culture shock, which is also a clash between good and evil, eventually balanced itself out as the narrative progressed. This *telenovela* addresses old wounds, but also provides a renewed fascination for Africa, which today is the main destination for a new wave of Portuguese ex-pats who were forced to find work abroad.

Another relatively new aspect when compared to other *telenovelas* was the division into seasons, which is a well-known trait for soap operas that go on for many years, but not for prime time *telenovelas*. Nevertheless, taking a closer look at the storyline, one cannot recognize a true finale and there is not any interruption in the airing schedule. Therefore, this trait is more of a marketing and promotion strategy rather than an actual change of pace in the dramatic structure. By dividing the story into stages (up until now, three seasons have been announced), the show was also able to avoid a problem that has made it difficult for these types of products to be sold internationally: the high episode count. Portuguese *telenovelas* have been increasing in the total number of episodes, as initial contracts are now set on 300 chapters. This expansion is not only due to financial reasons, since the cost per unit is reduced, but also because of the increased daily consumption and the disregard for the original episode structure. These factors push production into making around 300 chapters in order to ensure enough airtime to cover a one-year run starting in September. By producing seasons of around 120 chapters, the *telenovela* becomes more competitive in the international market, as the current trend is for broadcasters to seek a reduced number of chapters per *telenovela* to allow for streamlined plots and minimize their reliance on a product that may compromise their programming for a year in case it becomes unsuccessful.

5. Theme of the year: (re)invention of TV fiction genres and formats

Fiction is a possibility, it is the “what if” that overlaps reality by constructing new possible worlds with a set of rules, which are plausible and defined by multiple possibilities or alternate paths that teach us a valuable life lesson. They help us in re-evaluating our own problems.

The first time the rules of fiction narrative were defined in writing was in Aristotle’s *Poetics*. According to him, “tragedy is the imitation of an action that is serious [...] with incidents arousing pity

and fear, wherewith to accomplish a catharsis of these emotions” (Aristotle, s.d.:110). Catharsis is a ritualistic experience that worked as a form of purification while, at the same time, binding communities. The devices for tragedy remained valid for many other genres that later emerged, as is the case of melodrama. Vehicles such as theatre, printed serials, radio and cinema divulged and popularized these types of stories, which were often tearjerkers. A closer reading, however, often reveals much more than what the stories tell at the surface by revealing criticisms to social conventions and the cultural gender constrictions. During the 1980s, the genre would migrate in full force into film and television, where it thrives to this day. Still, what do we actually mean when we talk about genre? Originally, “genre purports as much to *classify* (linguistic and financial exchange) as to *generate* (production of what is being delivered, what is exposed, what is put forward as an object of trade)” (Cordeiro, 2007:14).

Television embodies the paradox of artistic creativity existing within an industrial paradigm. As such, it is a world of fancy that is subjected to financial criteria and appraisal. Furthermore, as a result of competition, there is an investment in experimentation in the attempt to innovate themes, so sub-formats and sub-genres⁵ are created in a kind of hybridization or mixing of idiosyncrasies. Results are not always coherent and viewers may end up not decoding the text in an integrated and aligned way, which can result in ratings failure and, at times, the cancellation of the format and/or genre. Notwithstanding, there is an example in Portugal that contradicts this inevitability, by showing that the course of reinvention can serve as an example and set the tone. The *telenovela*, which has been locally produced since 1982, drew its building blocks from Brazil.⁶ Since

⁵ Besides the formats and genres already established, others evolve adapted not only to the programming needs but also to the international trends, such as long series (format) and police drama (genre).

⁶ Portuguese *telenovelas*, since its origin, have presented several similarities to the Brazilian ones regarding format and content. Globo *telenovelas*, which have been broadcast since 1977 in Portugal, dictated tendencies and quality standards with the Portuguese

then, as a result of the media landscape, of the production structures, of the emergence of new authors and of the country's own acceptability to other production centers, *telenovelas* started taking their own shape and are now presenting more complex dramatizations (Mittel, 2012), with increasingly sophisticated plots, casts of 40 characters and hundreds of featured characters that complete the intersections between plots. By maximizing the simultaneous dimensions of episodes and series, concurrent stories can be spun out with their own developments, enabling viewers to watch the product both as a whole and the storylines and plots that most interest them.

Market demands such as undefined broadcast schedules have also led to the need to work with different types of genres simultaneously. These aspects resulted in a format that is farther away from the traditional melodramatic structure of *telenovelas* and closer to a kind of "container". Products from 2015 such as *Mar Salgado*, *Coração d'Ouro* (SIC) or *Única Mulher* and *Santa Bárbara* (TVI) develop drama and comedy, but also mystery or even police thrillers within the same narrative, thus contributing to a less standardized and more interesting output.

This kind of living organism with a varied and particular set of traits that are linked to more complex structures is also able to diversify its reach beyond that of the typical viewer⁷, both in terms of demographics and preferences. The scope for *telenovela* consumers is, therefore, broadened, as is made clear by the importance of the *telenovela* as a core product on free-to-air stations. From 1998/1999 onwards, TVI pushed for the production of *telenovelas* in an ongoing fashion for prime time, which was the starting point for establishing an industrial framework. In 2010/2011, as a clear attempt to compete in ratings, SIC stirred the market by raising the production

viewership, so that, in order to cause some impact, national productions had meet those requirements. Thus, between 1982 e 1999, most national *telenovelas* presented stories, themes and social and family structures more similar to the Brazilian reality rather than the Portuguese one.

⁷ Historically, the Portuguese *telenovela* typical viewer is female, living in the countryside, aged over 64 years, of low class.

value. Titles such as *Laços de Sangue* (2010/2011), *Mar Salgado* (2014/2015) and *Coração d'Ouro* (2015/2016) were able not only to earn national prominence by managing to overtake the ratings of its main competitor but also to garner international visibility by respectively receiving an Emmy for best *telenovela* and bronze and gold medals in the New York Festivals 2016. Nowadays, Portuguese *telenovelas* are consolidating their international presence as an “innovative” format and Portugal is taking steps into having a high quality framework that is able to accommodate foreign countries looking for the necessary skill set to develop long serials at competitive prices.

At the same time, it is important to emphasize the public service channel and its endeavor to offer an alternative to *telenovelas* by investing in the series format and diversifying casts and production teams. It is estimated that within five years the national fiction market will change due to a shift in formats and genres. This will be a critical factor for a positive development, whether in number of titles, hour volume or even the establishment of a star system that can be recognized internationally and contributes to product circulation.

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9

SPAIN: INNOVATION AND TRADITION

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1. Spain's audiovisual context in 2015

Fiction premiered in 2015 ratified both the quality of Spanish production and its ability to connect with the viewers. In a year when stories were most often set in the present and mystery/thriller fictions became the predominant genre, the series remains as the preferred format. The reduction in the number of titles aired (three less than in 2014) is the result of budget control by autonomic public broadcasters. The fewer hours, however, show an incipient trend to shorten the duration of the more expensive premieres as well as a reduction in the number of series. As in previous years, domestic fiction continues to be almost the exclusive territory of public generalist broadcasters.

1.1. Open television in Spain

Public television in 2015 continues to suffer the effects of the economic crisis. Meanwhile, the major private networks have re-configured their DTT (Digital Terrestrial Television) presence after several stations were closed last year.

Chart 1. Open TV networks

Reach	Public		Private	
	First channel	Second channel	First channel	Second channel
State¹ (national coverage)	La1	La2	Antena3, Tele5, Cuatro, LaSexta	FDF-T5, Neox, Nova, Clan, Discovery Max, Divinity, Boing, 13 TV, Paramount Channel, Boing, Energy, Disney Channel, Teledeporte, Mega, 24H, MTV, MarcaTV, Nitro, LaSexta2, CNN+, Intereconomía
Auto-nomic (regional coverage)	TV3, Aragón TV, Canal Sur, TVCAN, CMT, ETB1, ETB2, IB3, Telemadrid, TPA, TVG, Canal Extremadura TV	ETB3, La Otra, TPA, TVG2, Super3/33, 3/24	8Madrid, 8TV, CyLTV, La8, V Televisión, 7RM	

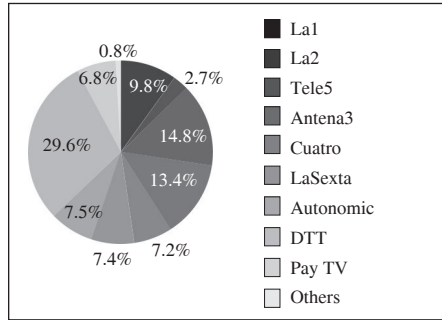
Source: Obitel Spain

Television consumption has decreased five tenths from the previous year (234 minutes per viewer/day), one tenth more than in 2014, a trend consistent with the rise of second-screen use. Ratings for Mediaset Group have decreased seven tenths (31.0%), two less than in the case of Atresmedia (26.8%). RTVE has maintained the same ratings (16.7%) and Vocento has lost a tenth (3.4%), while Unidad Editorial has won six (4.2%). Rating distribution by channels places Tele5 in the lead for the fourth consecutive year (14.8%), with a three tenths increase, while Antena3 (13.4%) has lost two tenths. La1 ranks third (9.8%) with a tenth more than in 2014, followed by LaSexta (7.4%) and Cuatro (7.2%), which have won respectively two and five tenths. Ratings of public regional networks registered 7.5%, private regional networks recorded 0.8%, and specialty DTT reached 29.6%. Pay specialty DTT channels have experienced the most significant increase of this group (six tenths).

¹ Translator note: In the Spanish case, “state coverage” or “national coverage” refer to networks that reach the whole country, while “autonomic coverage” refers to networks with regional coverage of their own Autonomic Communities. Both autonomic and state networks include public and private ownership.

Graph 1a. Share by state networks

Network	Share (%)
La1	9.8
La2	2.7
Tele5	14.8
Antena3	13.4
Cuatro	7.2
LaSexta	7.4
Autonomic	7.5
DTT	29.6
Pay TV	6.8
Priv. aut.	0.8
TOTAL	100

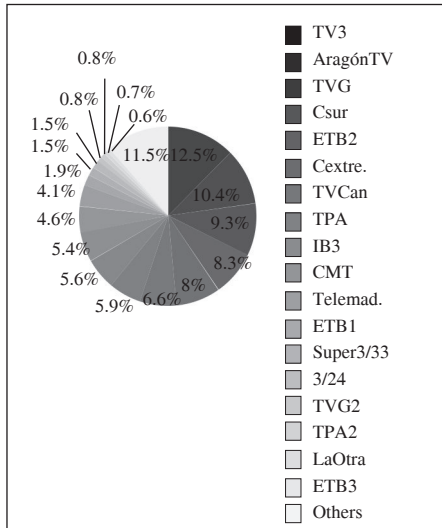


Source: Barlovento Comunicación/Kantar Media

The ranking of the top five autonomic channels is similar to last year's. TV3 (12.5%) is in first position, followed by Aragón TV (10.4%), TVG (9.3%), Canal Sur (8.3%) and ETB2 (8.0%). Ratings for regional networks have decreased as a whole, with the exception of Extremadura TV (6.6%), which increases by 0.9%. CMT (4.6%) and TVG2 (0.8%) maintain the same levels of 2014.

Graph 1b. Share by autonomic networks

Network	Share (%)
TV3	12.5
Aragón TV	10.4
TVG	9.3
Canal Sur	8.3
ETB2	8
Canal Extr.	6.6
TVCAN	5.9
TPA	5.6
IB3	5.4
CMT	4.6
Telemadrid	4.1
ETB1	1.9
Super3/33	1.5
3/24	1.5
TVG2	0.8
TPA2	0.8



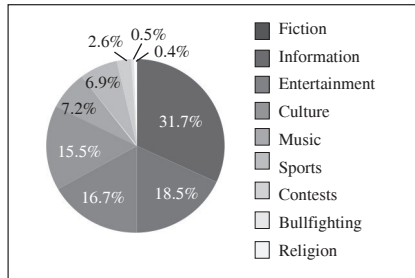
La Otra	0.7
ETB3	0.6
Others	11.5
Total	100

Source: Barlovento Comunicación/Kantar Media

The distribution of time dedicated to each genre follows a very similar pattern to last year's. Fiction is once again the most watched genre (31.6%), followed by information (18.4%), entertainment (16.6%) and culture (15.4%). Music (7.1%), however, overtakes sports (6.9%) in a year lacking major international competitions. Contests (2.6%), bullfighting (0.5%) and religious spaces (0.4%) occupy the last three positions.

Graph 2. Offer by genre in TV programming

Genres	%
Fiction	31.7
Information	18.5
Entertainment	16.7
Culture	15.5
Music	7.2
Sports	6.9
Contests	2.6
Bullfighting	0.5
Religion	0.4
Total	100



Source: Barlovento Comunicación/Kantar Media

1.2. Audience trends in 2015

Television consumption through DTT networks (80.6%) and digital satellite (3.3%) decreases 1.4 and 0.3 points respectively, while IPTV (5.4%) increased 1.6 points. The rest of distribution systems amount to 0.5%. Tele5 remains the preferred network for women and viewers of all ages, except for the age group 45-65, which remains faithful to Antena3. Clan is, once again, the favorite channel among children, while TV3 excels in all age groups in Catalonia. Also, 47% of Spaniards watch television alone (a fact con-

sistent with the increase of mobile viewing), 39% watch TV with another person and 14% watch it as a group.²

The soccer match between Real Madrid and Atlético de Madrid on April 14th, with 8,668,000 viewers and 45.4% share, leads the annual ranking of the 50 most watched events, which includes two episodes of the comedy *Allí Abajo* (Antena3), five of the crime show *El Príncipe* (Tele5) and one of *Velvet* (Antena3).

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

Advertising investment in conventional media increased 6.4% during the first half of 2015 compared to the same period last year. TV growth reached 8.0% and amounted to 1.4 billion euros, 89.9% of which were spent on open-access state television, 6.6% in regional public broadcasters and 3.5% in pay TV.³ The two major political debates surrounding the legislative elections in December became the most profitable advertising space of the year, with a rate of 1,400 euros per second. They were simulcast in different channels of Atresmedia Group.

In January 2015 the Council of Ministers approved an institutional advertising plan worth 48.9 million euros (19% more than the previous year), 90% of which were intended to promote healthy and safe habits as well as to support new technologies.⁴

1.4. Merchandising and social merchandising

Books and games based on successful fictions have become a profitable merchandising strategy used to promote the shows and generate additional income. In absence of commercial advertising to

² See Barlovento Comunicación's ratings report (<http://www.barloventocomunicacion.es/images/publicaciones/analisis-televisivo-2015-Barlovento.pdf>).

³ Infodex estimates (http://www.focusmedia.es/wp-content/uploads/2015/10/NP-3er-Trimestre_15_21102015.pdf). Open-access private networks account for 86% of advertising revenue, according to data from CNMC updated on October 27, 2015 (http://data.cnmc.es/datagraph/jsp/inf_anual.jsp).

⁴ See *Plan 2015 de Publicidad y Comunicación Institucional* (<http://www.lamoncloa.gob.es/serviciosdeprensa/cpci/Documents/Plan2015.pdf>).

generate revenue, TVE has become one of the most active companies in the exploitation of these resources. Some examples include: the multiplatform game for PC, mobiles and tablets based on *Águila Roja*; the novel about *Carlos, Rey Emperador*, inspired by the life of the monarch; and a contest in which the best photos of Spanish families from the 50s and 60s published on *Cuéntame Cómo Pasó* website were rewarded with a book.

Among the solidarity actions carried out by the Foundation Atresmedia, stands out the celebration of the 25th anniversary of the Convention on the Rights of the Child, with ten spots aired in different networks of the group, featuring NGOs and foundations dedicated to safeguarding the rights of children. Mediaset has dedicated the promotions from its charity project “Doce meses doce causas”, inaugurated in 1999, to issues such as the fight against Aids, gender violence, civic attitudes, etc.

1.5. Communication policies

Six days before the Supreme Court was scheduled to rule on the possible cancellation of eight DTT licences⁵, which would have added to the nine closed last year, Infraestructuras y Gestión 2002 withdrew the complaint after reaching an economic agreement with the affected communication groups. In September, the government resolved the restructuring of the frequency distribution of DTT by competitively awarding six new channels, which are required to start broadcasting before April 2016: three in HD (Mediaset, Atresmedia and Real Madrid TV) and three in SD (Secuoya Group, 13 TV and Kiss Media). At the regional level, the Administrative Tribunal of Contractual Appeals upheld the concession of 7 Región de Murcia to Secuoya Group.

⁵ The media groups affected were Mediaset (Boing, Energy, FDF and Divinity), Atresmedia (Neox and Nova), Net TV-Vocento (Paramount and Disney Channel) and 13 TV, which rents its frequency to Unidad Editorial.

1.6. Information and Communication Technology (ICT) trends

In a country where 60.5% of internet users watch videos or movies on their mobile devices (ONTSI, 2015:17), the momentum of mobile TV is undoubtedly the outstanding feature of the ICT trends for, at least, four reasons. First, the merge of Movistar and Canal+ (see section 1.8) has significantly reduced the offer accessible via satellite television while enhancing VoD service Yonvi. After four years of existence, Yonvi recorded 14 million downloads per month (54% were TV fiction) and reached over one million members, half of them accessing television via mobile phones and tablets.⁶ Second, the abandonment of the frequency band of 800 megahertz (digital dividend) has allowed to reconfigure the coexistence of DTT with fourth generation data networks, another major milestones for mobile TV. Third, the launch of Flooxer, Atresmedia's online video platform that joins Atresplayer and offers its own content online, and Atrestube, a multichannel combining Atresmedia's television programs with products created exclusively for the internet. Finally, it should be noted that Vodafone has incorporated Netflix, an application that runs on smart television receivers and PS3, PS4, Xbox 360, Xbox One, Wii and Wii U consoles, as well as Apple TV, Chromecast, Amazon Fire TV, smartphones and tablets.

1.7. Open television (public and private)

The future of TVE's financial model remains an unsolved issue. Since commercial advertising was eliminated (January 1st, 2010), the public network became dependant on government grants and cultural sponsorships. Meanwhile, budget cuts have taken their toll on the mixed model of regional networks. Still, RTVE has greatly improved its economic balance thanks to the sale of RTVE's real estate assets, the return of about 70 million euros as a result of the VAT Act (which allows public television to deduct VAT) and the

⁶ TV fiction integrates 43% of the more than 15,000 titles that make up the catalog of Yonvi. See http://cultura.elpais.com/cultura/2015/11/26/television/1448543993_763427.html.

increase of commercial revenue, which has grown from 18.2 million in 2010 to 49.6 in 2015.⁷

TVE, which released a new brand image for all channels in September, has boosted the production of fiction by increasing the budget line to 29.1 million euros, 16.2% more than the previous year.⁸ In December, TVE announced Star HD, a new specialty HD channel for Latin America whose programming includes 80% of their own fiction and 20% of entertainment formats.

Highlights at the regional level include the reopening of Canal 9 to air only fiction through the two frequencies that held after its closure in 2013.⁹ One frequency is dedicated to films, series and documentaries, while the other offers children's programming and cartoons.

The expansion of private broadcast TV reflects the increase in advertising investment and exports. In October, Mediaset and Atresmedia informed the National Securities Market Commission (CNMV, in Spanish) on profits earned in the first nine months of the year: 113.8 million euros in the case of Mediaset (four and a half times more than in 2014) and 69.3 million euros in the case of Atresmedia (47.1% more than the previous year). As for the new channels, in July Atresmedia recovered the frequency GolTV, owned by Mediapro and launched by Mega, a generalist network which joined Atreseries channel five months later. This was possible as a result of DTT's redistribution and it positioned Mega as an alternative to FDF (Mediaset). Kiss Media replaced music channel Kiss TV by Hit TV, which extended the range of music formats, and announced the launch of generalist channel 9Kiss, in early 2016, a network aimed at young-adult female target. Finally, Secuoya Group inaugurated D10, a family-oriented generalist channel.

⁷ See http://cultura.elpais.com/cultura/2016/01/28/television/1454005025_477777.html.

⁸ TVE's 2015 budget was 685,850,000 euros. See <http://www.elmundo.es/television/2015/01/05/54a83c1a22601deb628b457b.html>.

⁹ The regional government had shut down Canal 9 as they deemed it impossible to sustain the debt the network had accumulated, which, at the time, reached 1.2 billion euros.

1.8. Pay TV

The increase of 1.4 points in the average ratings of pay TV (17.4% in 2014 and 18.8% in 2015) is consistent with the increase in the number of subscribers, which amounted to 5,352,991 homes by the second half of the year.¹⁰ The growth of IP distribution and cable, at the expense of the satellite¹¹, is due in large part to a price reduction of service integrated packages (landline phone, mobile phone, internet and television).

The most significant change was the merger of Movistar and Canal+ in June to form Movistar+.¹² At the end of the year, Movistar+ announced the launch of #0¹³, a channel dedicated to sports and entertainment, which will also feature fiction production. It also reached an agreement with Discovery Networks to include in its satellite platform TV Discovery Channel, Eurosport1 and Eurosport2, available until then only through IPTV. The agreement between Discovery Networks and Movistar+ also includes the arrival of HBO in 2016¹⁴, which would join VoD service Netflix, available in Spain since October, whose catalog includes Spanish series as successful *Velvet* (Antena3), *Águila Roja* and *El Ministerio del Tiempo* (TVE1).

1.9. Independent producers

In Spain there are 300 film and television production companies, grouped in nine associations, and integrated, in turn, in the

¹⁰ See http://data.cnmec.es/datagraph/jsp/inf_trim.jsp.

¹¹ See <http://www.cnmec.es/es-es/cnmec/estad%C3%ADsticas/estad%C3%ADsticadetalle.aspx?id=57676>.

¹² The channels offered by Movistar+ are: Canal+ Series, Canal+ Series Xtra, Fox, AXN, TNT, Comedy Central, Calle 13, Cosmo, AMC, Fox Life, AXN White and Syfy.

¹³ Canal + debuted in Spain in 1990, with quality programming that has significantly influenced the Spanish television system. #0 aims to keep alive the “spirit” of Canal+, but banking on its own production. See http://cultura.elpais.com/cultura/2016/02/05/television/1454697573_674477.html.

¹⁴ See statements from HBO’s international representative: <http://www.bloomberg.com/news/articles/2016-01-19/hbo-plans-to-take-on-netflix-in-spain-with-streaming-service>.

Federation of Spanish Audiovisual Producers (Fapae, in Spanish), an organization that promotes and defends the rights of the sector.¹⁵

One of the highlights of the sector is the sale of 16% of Imagina (the largest audiovisual producer in Spain and the owner of Globomedia) to the other partners, which increased Televisa's share from 14.5% to 19%. Edemol Shine Group, present in more than 30 markets, has completed the merger of its subsidiaries in Spain and Portugal to form Endemol Shine Iberia, which includes Shine Iberia, Zeppelin, Gestmusic, Diagonal and Endemol Portugal. At the time of writing these lines, Netflix is negotiating with various domestic producers a Spanish project, as it has already happened in France and Italy.

1.10. International trends

Spain has joined the pay TV offer diversification trend with Netflix's arrival. The VoD service has benefited from the lower prices of integrated packages (landline phone, mobile phone, increased bandwidth and IPTV) offered by telecommunications companies. The technological and cultural convergence also result in the impulse of VoD services, increasing viewing via mobile devices, international expansion of open access TV and the boom of merchandising based on fiction shows.

The highlights of the year include the reconfiguration of DTT, following the closure of nine channels last year, an important turning point in the expansion of private open TV. Tele5 is again the most watched network, although only by three tenths over Antena3, second in the ranking. Fiction is the genre with greater presence in Spanish programming. The increase in advertising investment and the expansion of mobile TV reflect the dynamism of the Spanish television system, in a year in which both the reception by IPTV and the number of subscribers of pay television saw an increase.

¹⁵ See <http://www.fapae.es>.

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

In 2015, national broadcasters released 37 titles (32 in 2014) and reran 14 (18 in 2014). The public broadcaster La1 has the highest number of releases (12 titles), followed by Antena3 (nine titles) and Tele5 (six titles), which was more focused on entertainment formats than its competitors.

Table 1a. State fiction broadcasted in 2015

<p>PREMIERE STATE TITLES – 37</p> <p>La1 – 12 state titles</p> <ol style="list-style-type: none"> 1. <i>Acacias 38</i> (serial) 2. <i>Águila Roja</i> (series) 3. <i>Carlos, Rey Emperador</i> (series) 4. <i>Cuéntame Cómo Pasó</i> (series) 5. <i>El Clavo de Oro</i> (TV movie) 6. <i>El Ministerio del Tiempo</i> (series) 7. <i>Habitaciones Cerradas</i> (TV movie) 8. <i>La Española Inglesa</i> (TV movie) 9. <i>Olmos y Robles</i> (series) 10. <i>Santa Teresa</i> (TV movie) 11. <i>Seis Hermanas</i> (serial) 12. <i>Victor Ros</i> (series) <p>Antena3 – 9 state titles</p> <ol style="list-style-type: none"> 13. <i>Algo que Celebrar</i> (series) 14. <i>Allí Abajo</i> (series) 15. <i>Amar es para Siempre</i> (serial) 16. <i>Bajo Sospecha</i> (series) 17. <i>El Secreto de Puente Viejo</i> (serial) 18. <i>Mar de Plástico</i> (series) 19. <i>Sin Identidad</i> (series) 20. <i>Velvet</i> (series) 21. <i>Vis a Vis</i> (series) <p>Tele5 – 6 state titles</p> <ol style="list-style-type: none"> 22. <i>Anclados</i> (series) 23. <i>Aquí Paz y Después Gloria</i> (series) 24. <i>B&B, de Boca en Boca</i> (series) 25. <i>El Príncipe</i> (series) 26. <i>La que se Avecina</i> (series) 27. <i>Los Nuestros</i> (miniseries) <p>Cuatro – 2 state titles</p> <ol style="list-style-type: none"> 28. <i>Gym Tony</i> (serial) 	<p>Neox – 1 state title</p> <ol style="list-style-type: none"> 31. <i>Retorno a Lilifor</i> (sketch) <p>CO-PRODUCTIONS – 6</p> <p>Antena3 – 1 state title</p> <ol style="list-style-type: none"> 32. <i>Refugiados</i> (series) (Spain, England) <p>Tele5 – 4 state titles</p> <ol style="list-style-type: none"> 33. <i>Las Aventuras del Capitán Alatraste</i> (series) (Spain, Germany, Hungary) 34. <i>La Bella y la Bestia</i> (miniseries) (Italy, Spain) 35. <i>La Dama Velada</i> (series) (Italy, Spain) 36. <i>Las Mil y una Noches</i> (miniseries) (Italy, France, Germany, Spain) <p>Canal+1 – 1 state title</p> <ol style="list-style-type: none"> 37. <i>Santuario</i> (TV movie) (Spain, France) <p>RERUN TITLES – 14</p> <p>La1 – 6 state titles</p> <ol style="list-style-type: none"> 38. <i>Carta a Eva</i> (miniseries) 39. <i>El Caso Wanninkhof</i> (miniseries) 40. <i>La Memoria del Agua</i> (miniseries) 41. <i>No Estás Sola, Sara</i> (TV movie) 42. <i>Tarancón, El Quinto Mandamiento</i> (miniseries) 43. <i>Vicente Ferrer</i> (miniseries) <p>La2 – 4 state titles</p> <ol style="list-style-type: none"> 1. 44. <i>Amar en Tiempos Revueltos</i> (serial) 45. <i>Gran Reserva</i> (series) 46. <i>Los Misterios de Laura</i> (series) 47. <i>Santa Teresa de Jesús</i> (series)
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<p>29. <i>La Rabia</i> (series)</p> <p>Divinity – 1 state title</p> <p>30. <i>Yo Quisiera</i> (serial)</p>	<p>Tele5 – 4 state titles</p> <p>48. <i>El Don de Alba</i> (series)</p> <p>49. <i>La Fuga</i> (series)</p> <p>50. <i>María de Nazaret</i> (miniseries)</p> <p>51. <i>Romeo y Julieta</i> (miniseries)</p> <p>TOTAL PREMIERE TITLES: 37</p> <p>TOTAL RERUN TITLES: 14</p> <p>TOTAL BROADCASTED TITLES: 51</p>
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Source: Obitel Spain

The regional channels released 20 titles (28 in 2014), concentrated mainly in Galician channel TVG (eight titles) and Catalan TV3 (five titles), and there were 17 reruns (25 in 2014). Consequently, the presence of fiction in regional channels has been reduced.

Table 1b. Autonomic fiction broadcasted in 2015

<p>PREMIERE AUTONOMIC TITLES – 20</p> <p>ETB1 – 2 autonomic titles</p> <p>1. <i>Aitareen Etxea</i> (series)</p> <p>2. <i>Goenkale</i> (serial)</p> <p>IB3 – 2 autonomic titles</p> <p>3. <i>Hotel Bellavista</i> (series)</p> <p>4. <i>Ja ho Val</i> (sketch)</p> <p>TV3 – 5 autonomic titles</p> <p>5. <i>13 Dies d'Octubre</i> (TV movie)</p> <p>6. <i>Cites</i> (series)</p> <p>7. <i>El Cafè de la Marina</i> (TV movie)</p> <p>8. <i>La Riera</i> (serial)</p> <p>9. <i>Merlí</i> (series)</p> <p>TV Canaria – 1 autonomic title</p> <p>10. <i>Aquí no se Fía</i> (series)</p> <p>TVG – 8 autonomic titles</p> <p>11. <i>Casa Manola</i> (series)</p> <p>12. <i>Era Visto</i> (sketch)</p> <p>13. <i>Hospital Real</i> (series)</p> <p>14. <i>Hotel Almirante</i> (miniseries)</p> <p>15. <i>Luci</i> (series)</p>	<p>RERUN TITLES – 17</p> <p>Canal 33 – 2 autonomic titles</p> <p>21. <i>La Memòria dels Cargols</i> (series)</p> <p>22. <i>La Riera</i> (serial)</p> <p>Canal Sur – 3 autonomic titles</p> <p>23. <i>Planta 25</i> (series)</p> <p>24. <i>La Mari</i> (miniseries)</p> <p>25. <i>Rocío, Casi Madre</i> (series)</p> <p>ETB1 – 1 autonomic title</p> <p>26. <i>Mugaldekoak</i> (TV movie)</p> <p>IB3 – 1 autonomic title</p> <p>27. <i>Mossèn Capellà</i> (series)</p> <p>TV3 – 7 autonomic reruns</p> <p>28. <i>39+1</i> (series)</p> <p>29. <i>Dues Dones Divines</i> (series)</p> <p>30. <i>Gran Nord</i> (series)</p> <p>31. <i>Infidels</i> (series)</p> <p>32. <i>KMM</i> (series)</p> <p>33. <i>Porca Misèria</i> (series)</p> <p>34. <i>Ventdelplà</i> (series)</p>
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26. <i>Pazo de Familia</i> (series) 17. <i>Padre Casares</i> (series) 18. <i>Serramoura</i> (series) 7RM – 1 autonomic title 19. <i>Ojopollostreet</i> (sketch) Forta – 1 autonomic title 20. <i>El Faro</i> (serial) ¹⁶	TVG – 3 autonomic titles 35. <i>Libro de Familia</i> (series) 36. <i>Mareas Vivas</i> (series) 37. <i>Pratos Combinados</i> (series) TOTAL PREMIERE TITLES: 20 TOTAL RERUN TITLES: 17 TOTAL BROADCASTED TITLES: 37
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Source: Obitel Spain

The time devoted to national premiere fiction is 1,335 hours and 30 minutes (910 hours 40 minutes in 2014). The increase over last year is also noticeable in the number of chapters/episodes (1,371 chapters/episodes in 2015; 997 in 2014).

Table 2a. State premiere fiction in 2015: countries of origin

Country	Titles	%	Chap./ep.	%	Hours	%
STATE (total)	31	83.8	1371	97.4	1298:10:00	97.2
OBITEL COUNTRIES (total)	0	0.0	0	0.0	0:00:00	0.0
NON OBITEL COUNTRIES (total)	6	16.2	37	2.6	37:20:00	2.8
Argentina	0	0.0	0	0.0	0:00:00	0.0
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	0	0.0	0	0.0	0:00:00	0.0
Ecuador	0	0.0	0	0.0	0:00:00	0.0
Spain	31	83.8	1371	97.4	1298:10:00	97.2
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	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
National co-productions	6	16.2	37	2.6	37:20:00	2.8
Ibero-American co-productions	0	0.0	0	0.0	0:00:00	0.0
TOTAL	37	100.0	1408	100.0	1335:30:00	100.0

Source: Obitel Spain

¹⁶ *El Faro* premiered in Aragón TV, Canal Extremadura, Canal Sur, ETB2, La Otra, RC-MTV, TV3 and TV Canarias.

The total number of chapters/episodes of state and regional fiction premiered in 2015 is very similar to last year's, with 2,050 episodes/chapters (2,030 in 2014). The time on air, however, has significantly increased (1,909 hours and 16 minutes in 2015; 1,631 hours and 40 minutes in 2014).

**Table 2b. State and autonomic premiere fiction in 2015:
countries of origin**

Country	Titles	%	Chap./ep.	%	Hours	%
STATE/AUTONOMIC (total)	51	89.5	2050	98.2	1871: 56: 00	98.0
OBITEL COUNTRIES (total)	0	0.0	0	0.0	0:00:00	0.0
NON OBITEL COUNTRIES (total)	6	10.5	37	1.8	37:20:00	2.0
Argentina	0	0.0	0	0.0	0:00:00	0.0
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	0	0.0	0	0.0	0:00:00	0.0
Ecuador	0	0.0	0	0.0	0:00:00	0.0
Spain	51	89.5	2050	98.2	1871:56: 00	98.0
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	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
National co-productions	6	10.5	37	1.8	37:20:00	2.0
Ibero-American co-productions	0	0.0	0	0.0	0:00:00	0.0
TOTAL	57	100.0	2087	100.0	1909:16:00	100.0

Source: Obitel Spain

The Spanish networks have participated in only six European co-productions during 2015. TVE was the lead on the project *Las Aventuras del Capitán Alariste*, a series about the eponymous character created by Arturo Pérez Reverte, co-produced with the German company Beta Film. *Refugees* (LaSexta), a time travel fiction about that topic, was financed in equal parts by Mediaset Spain and

BBC. The other four titles are Italian productions with Spanish participation.

Table 3. Co-productions (state and autonomic)

TOTAL CO-PRODUCTIONS WITH OBITEL COUNTRIES: 0					
	Titles	Countries	Production	Format	
Non Obitel countries	<i>La Bella y la Bestia</i>	Spain	Mediaset España	Miniseries	
		Italy	Lux Vide		
	<i>Las Mil y Una Noches</i>	Spain	Mediaset España	Miniseries	
		Italy	Lux Vide		
	<i>Refugiados</i>	Spain	Bambú Producciones	Series	
		United Kingdom	BBC		
	<i>La Dama Velada</i>	Spain	Mediaset España	Series	
		Italy	Lux Vide		
	<i>Las Aventuras del Capitán Alatriste</i>	Spain	DLO Producciones	Series	
		Germany	Beta Film		
	<i>Santuario</i>	Spain	MOD Producciones, Kowalski Films	TV movie	
		Belgium, France	Haut et Court TV, Versus Product		
	TOTAL CO-PRODUCTIONS WITH NON OBITEL COUNTRIES: 6				

Source: Obitel Spain

As a result of daily serials being aired in the afternoon, this slot has the greatest number of chapters/episodes (915 vs. 493 at prime time) and total number of hours (815 hours and 10 minutes vs. 520 hours and 20 minutes at prime time). The proportion increases when numbers for autonomic and national fiction are aggregated: 1,140 hours and 40 minutes in the afternoon and 762 hours and six minutes at prime time; 1,349 chapters/episodes in the afternoon and 725 at prime time.

Table 4a. Chapters/episodes and hours by state time slot

Time slot	State			Ibero-American			Total		
	C/E	%	H	C/E	%	H	C/E	%	H
Morning (6:00-15:00)	0	0.0	0:00:00	0	0.0	0:00:00	0	0.0	0:00:00
Afternoon (15:00-21:00)	915	65.0	815:10:00	0	0.0	0:00:00	915	65.0	815:10:00
Prime time (21:00-23:00)	493	35.0	520:20:00	0	0.0	0:00:00	493	35.0	520:20:00
Night (23:00-6:00)	0	0.0	0:00:00	0	0.0	0:00:00	0	0.0	0:00:00
Total	1408	100.0	1335:30:00	0	0.0	0:00:00	1408	100.0	1335:30:00

Source: Obitel Spain

Table 4b. Chapters/episodes and hours by state and autonomic time slot

Time slot	State and autonomic			Ibero-American			Total		
	C/E	%	H	C/E	%	H	C/E	%	H
Morning (6:00-15:00)	0	0.0	0:00:00	0	0.0	0:00:00	0	0.0	0:00:00
Afternoon (15:00-21:00)	1349	64.6	1140:40:00	0	0.0	0:00:00	1349	64.6	1140:40:00
Prime time (21:00-23:00)	725	34.7	762:06:00	0	0.0	0:00:00	725	34.7	762:06:00
Night (23:00-6:00)	13	0.6	6:30:00	0	0.0	0:00:00	13	0.6	6:30:00
Total	2087	100.0	1909:16:00	0	0.0	0:00:00	2087	100.0	1909:16:00

Source: Obitel Spain

Table 5a. Formats of state fiction

Format	National				Ibero-American							
	Titles	%	C/E	%	H	%	Titles	%	C/E	%	H	%
Serial	6	16.2	1,145	81.3	1026:30:00	76.9	0	0.0	0	0.0	0:00:00	0.0
Series	21	56.8	238	16.9	277: 55: 00	20.8	0	0.0	0	0.0	0:00:00	0.0
Miniseries	5	13.5	14	1.0	19:50:00	1.5	0	0.0	0	0.0	0:00:00	0.0
TV movie	4	10.8	4	0.3	7:10:00	0.5	0	0.0	0	0.0	0:00:00	0.0
<i>Unitario</i>	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
Sketch	1	2.7	7	0.5	4:05:00	0.3	0	0.0	0	0.0	0:00:00	0.0
Total	37	100.0	1408	100.0	1335:30:00	100.0	0	0.0	0	0.0	0:00:00	0.0

Source: Obitel Spain

Table 5b. Formats of state and Ibero-American fiction

Format	National				Ibero-American							
	Titles	%	EC	%	H	%	Titles	%	EC	%	H	%
Serial	9	15.8	1,616	77.4	1389:40:00	72.8	0	0.0	0	0.0	0:00:00	0.0
Series	32	56.1	402	19.3	465: 50: 00	24.4	0	0.0	0	0.0	0:00:00	0.0
Miniseries	6	10.5	17	0.8	24:20:00	1.3	0	0.0	0	0.0	0:00:00	0.0
TV movie	6	10.5	6	0.3	10:11:00	0.5	0	0.0	0	0.0	0:00:00	0.0
<i>Unitario</i>	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
Sketch	4	7.0	46	2.2	19:55:00	1.1	0	0.0	0	0.0	0:00:00	0.0
Total	57	100.0	2087	100.0	1909:16:00	100.0	0	0.0	0	0.0	0:00:00	0.0

Source: Obitel Spain

As in previous years, the series is still the predominant format of Spanish fiction, with 21 national titles and 32 regional ones. However, the amount of time dedicated to the six national serials triplicates the time allocated to series (1,026 hours and 30 minutes vs. 277 hours and 55 minutes). The same pattern is found on the aggregated total of regional and national productions (1,389 hours and 40 minutes dedicated to serial and 465 hours and 50 minutes to the series).

As in previous years, the serials are broadcasted on weekdays in the afternoon, with the exception of *Goenkale* (ETB1), aired biweekly at prime time. The other formats are primarily found at prime time, although it is not uncommon for a fiction to be relegated to the night time slot due to poor performance, as it happened to *Las Aventuras del Capitán Alatriste* (La1) and *Rabia* this past year (Cuatro).

Table 6a. Formats of state fiction per time slot

Format	Morn- ing	%	After- noon	%	Prime time	%	Night	%	Tot- al	%
Serial	0	0.0	5	83.3	1	3.2	0	0.0	6	16.2
Series	0	0.0	1	16.7	20	64.5	0	0.0	21	56.8
Minise- ries	0	0.0	0	0.0	5	16.1	0	0.0	5	13.5
TV movie	0	0.0	0	0.0	4	12.9	0	0.0	4	10.8
<i>Unitario</i>	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Docu- drama	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Sketch	0	0.0	0	0.0	1	3.2	0	0.0	1	2.7
Total	0	0.0	6	100.0	31	100.0	0	0.0	37	100.0

Source: Obitel Spain

Table 6b. Formats of state and autonomic fiction per time slot

Format	Morn- ing	%	After- noon	%	Prime time	%	Night	%	Tot- al	%
Serial	0	0.0	7	87.5	2	4.2	0	0.0	9	15.8
Series	0	0.0	1	12.5	31	64.6	0	0.0	32	56.1
Minise- ries	0	0.0	0	0.0	6	12.5	0	0.0	6	10.5
TV movie	0	0.0	0	0.0	6	12.5	0	0.0	6	10.5

<i>Unitario</i>	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Docu-drama	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Sketch	0	0.0	0	0.0	3	6.3	1	100.0	4	7.0
Total	0	0.0	8	100.0	48	100.0	1	100.0	57	100.0

Source: Obitel Spain

Productions premiered in 2015 confirm the interest of Spaniards in fiction set in the past, with 18 national titles (15 period titles and three historical ones) and a total of 24 state and autonomic productions (20 period titles and four historical ones).

Table 7a. Time period in which state fiction is set

Time period	Titles	%
Present	18	48.6
Period	15	40.5
Historical	3	8.1
Other	1	2.7
Total	37	100.0

Source: Obitel Spain

Table 7b. Time period in which state and autonomic fiction is set

Time period	Titles	%
Present	32	56.1
Period	20	35.1
Historical	4	7.0
Other	1	1.8
Total	57	100.0

Source: Obitel Spain

For the first time, the most watched fiction (*El Príncipe*) had under five million viewers, as a result of the gradual decrease of ratings by network, proportional to the increase in the offer. The good results of many of the new shows, however, significantly reduced the difference between the most watched title and the last one in the top ten list (1.5 million viewers in 2015 and 2.5 million in 2014).

Table 8a. The ten most watched state titles: origin, rating, share

	Title	Country of original idea or script	Producer	Chaneel	Script-writer or author of original idea	Viewers	Rating	Share
1	<i>El Príncipe</i>	Spain	Plano a Plano	Tele5	A. Gabilondo, C. Benitez	4,610,000	10.4	24.1
2	<i>Allí Abajo</i>	Spain	Plano a Plano	Antena3	A. Gabilondo, C. Benitez, O. Terol	4,283,000	9.6	22.4
3	<i>La que se Avecina</i>	Spain	Infinia, Alba Adriática	Tele5	A. Knight, L. Knight, D. Deorador	4,040,000	9.1	23.6
4	<i>Los Nuestros</i>	Spain	Multi-park, Mediaset	Tele5	A. Hernandez	3,649,000	8.2	19.6
5	<i>Mar De Plástico</i>	Spain	Boomerang TV	Antena3	J. de la Rosa	3,643,000	8.2	21.36
6	<i>Bajo Sospecha</i>	Spain	Bamboo Producciones	Antena3	R.Campos, G. R. Neira	3,640,000	8.2	18.9
7	<i>Vis a Vis</i>	Spain	Globomedia	Antena3	D. Écija	3,547,000	8.0	19.8
8	<i>Velvet</i>	Spain	Bamboo Producciones	Antena3	R. Campos, G. R. Neira	3,369,000	7.6	19.1
9	<i>Anclados</i>	Spain	Globomedia	Tele5	I. San Roman	3,351,000	7.5	18.9
10	<i>Cuéntame Cómo Pasó</i>	Spain	Ganga Group	La1	M. A. Benardeau, Ernesto Ladrón de Guevara	3,125,000	7.0	16.9
Total productions: 10					Foreign scripts: 0			
100%					0%			

Source: Obitel Spain

On the other hand, the regional ranking experienced an increase of viewers of the most watched show (*Merlí*, TV3), while the distance between this series and number 10 (*Padre Casares*, TVG) is considerably greater. *Citas*, the only imported script of the list, is an adaptation of cult British fiction *Dates* (Channel 4).

**Table 8b. The ten most watched autonomic titles:
origin, rating, share**

	Title	Country of original idea or script	Producer	Channel	Script-writer or author of original idea	Viewers	Rating	Share
1	<i>Merlí</i>	Spain	Nova Veranda/ TVC	TV3	H. Lozano	561,000	7.9	18.4
2	<i>13 Dies d'Octubre</i>	Spain	Lastor Media	TV3	A. Pérez Vargas, R. Danès	398,000	5.6	15.2
3	<i>La Riera</i>	Spain	TVC	TV3	D. Plana	395,000	5.6	21.6
4	<i>Cites</i>	Spain	Filmax	TV3	B. Elsey	376,000	5.3	12.6
5	<i>El Café de la Marina</i>	Spain	Oberon Cine- matográfica	TV3	J. M. de Segarra	373,000	5.3	12.1
6	<i>Serramoura</i>	Spain	Voz Audio- visual	TVG	A. Guntín, V. Sierra, X. Moraes	172,000	6.5	15.0
7	<i>Pazo de Familia</i>	Spain	Central Contenidos	TVG	J. M. Besteiro	137,000	5.2	11.6
8	<i>Hotel Almirante</i>	Spain	Formato Produc- ciones	TVG	M. Rivera de la Cruz	120,000	4.5	10.8
9	<i>Casa Manola</i>	Spain	Filmanova	TVG	J. Path	101,000	3.8	9.0
10	<i>Padre Casares</i>	Spain	Voz Audio- visual	TVG	J. Coira, C. Sedes, Á. Sampayo, M. A. Espiñeira	100,000	3.8	9.7
Total productions: 10					Foreign scripts: 1			
100%					10%			

Source: Obitel Spain

The series is the predominant format of a classification with only one miniseries, in fourth place (*Los Nuestrs*, Tele5). On the contrary, compared with previous years, there is a remarkable diversity of genres.

**Table 9a. The ten most watched state fictions:
format, genre, length, time slot**

	Title	Format	Genre	Number of chap./ep. (in 2015)	First and last broadcast (in 2015)	Time slot
1	<i>El Príncipe</i>	Series	Police	10	04/14/15-06/23/15	Prime time
2	<i>Allí Abajo</i>	Series	Comedy	13	04/07/15-06/30/15	Prime time
3	<i>La que se Avecina</i>	Series	Comedy	5	04/20/15-05/18/15	Prime time
4	<i>Los Nuestros</i>	Miniseries	Adventure	3	03/02/15-03/16/15	Prime time
5	<i>Mar de Plástico</i>	Series	Police	13	09/22/15-12/22/15	Prime time
6	<i>Bajo Sospecha</i>	Series	Police	8	02/17/15-04/14/15	Prime time
7	<i>Vis a Vis</i>	Series	Thriller	11	04/20/15-06/25/15	Prime time
8	<i>Velvet</i>	Series	Drama	19	02/02/15-12/17/15	Prime time
9	<i>Anclados</i>	Series	Comedy	8	05/25/15-07/13/15	Prime time
10	<i>Cuéntame Cómo Pasó</i>	Series	Dramedy	19	9/01/15-05/21/15	Prime time

Source: Obitel Spain

Autonomic fiction offers a greater variety of formats, but with less diversity of genres than national fiction.

**Table 9b. The ten most watched autonomic fictions:
format, genre, length, time slot**

	Title	Format	Genre	Number of chap./ep. (in 2015)	First and last broadcast (in 2015)	Time slot
1	<i>Merlí</i>	Series	Dramedy	1	09/14/15-12/07/15	Prime time
2	<i>13 Días d'Octubre</i>	TV movie	Drama	1	09/10/15	Prime time
3	<i>La Riera</i>	Serial	Drama	211	01/07/15-12/23/15	Afternoon
4	<i>Cites</i>	Series	Drama	13	04/27/15-07/27/15	Prime time
5	<i>El Café de la Marina</i>	TV movie	Drama	1	03/30/15	Prime time

6	<i>Serramoura</i>	Series	Police	24	01/04/15-12/27/15	Prime time
7	<i>Pazo de Familia</i>	Series	Drama	33	01/05/15-12/28/15	Prime time
8	<i>Hotel Almirante</i>	Miniseries	Drama	3	04/05/15-04/19/15	Prime time
9	<i>Casa Manola</i>	Series	Comedy	4	06/01/15-06/22/15	Prime time
10	<i>Padre Casares</i>	Series	Comedy	15	07/01/15-09/28/15	Prime time

Source: Obitel Spain

The relevance of the police/thriller and action genres in the ten most watched state programs results in the greater weight of intrigue and workplace related themes. Addictions, corruption, gender and sexual identity issues continue to be recurring social themes of national fiction.

Table 10a. Themes in the ten most watched state titles

	Title	Prevailing themes	Social themes
1	<i>El Príncipe</i>	Action, intrigue, espionage, love, family.	Multiculturalism, religion, jihadist terrorism, sexism, corruption.
2	<i>Allí Abajo</i>	Humor, family, friendship, love, work.	Senior citizens, prejudices, regional stereotypes, hospital life, traditions.
3	<i>La que se Avecina</i>	Family, neighborhood relationships, love, friendship, betrayal.	Transsexuality, workplace relations, housing, child custody, addictions.
4	<i>Los Nuestrós</i>	Companionship, work, love, hierarchy, army.	War, jihadist terrorism, sexism, underdevelopment, cooperation.
5	<i>Mar de Plástico</i>	Intrigue, murder, love, sex, secrets.	Corruption, intellectual disability, alcoholism, racism, immigration.
6	<i>Bajo Sospecha</i>	Intrigue, family, work, secrets, deceptions.	Infertility, generational conflicts, gender violence, alcoholism, intellectual disability.
7	<i>Vis a Vis</i>	Fraud, prison life, deceit, family, friendship.	Homosexuality, sexual harassment, prison rehabilitation, drug addiction, marginality.
8	<i>Velvet</i>	Love, family, infidelity, business, fashion business.	Classism, gender, sexism, corporate conflicts, infertility.
9	<i>Anclados</i>	Humor, family, work, tourism, business.	Embezzlement, racism, classism, labor disputes, alcoholism.
10	<i>Cuéntame Cómo Pasó</i>	Love, family, friendship, politics, fraud.	Drug addiction, alcoholism, rape, terrorism, <i>Movida Madrileña</i> .

Source: Obitel Spain

In the regional fiction, however, family and love stories are still predominant, tackling a significant number of issues related to addictions, sexual identity and social inequalities.

Table 10b. Themes in the ten most watched autonomic titles

Title		Prevailing themes	Social themes
1	<i>Merlí</i>	Love, infidelity, friendship, family, sexuality.	Homosexuality, economic crisis, evictions, generational problems, bullying.
2	<i>13 Dies d'Octubre</i>	Honor, loyalty, family, slander, heroism.	Civil war, politics, nationalism, summary trial, execution.
3	<i>La Riera</i>	Family, work, business, deception, intrigue, friendship.	Homosexuality, illegal business, political corruption, multiculturalism, labor disputes.
4	<i>Cites</i>	Love, infidelity, family, relationships, loneliness.	Prostitution, homosexuality, disability, on-line relationships, separations.
5	<i>El Café de la Marina</i>	Love, family, neighbors, local manners (<i>costumbrismo</i>), gossips.	Abortion, sexism, social conventions, arranged marriage, poverty.
6	<i>Serramoura</i>	Police investigation, family, love, conspiracy, revenge.	Journalism, divorce, rape, alcoholism, religion.
7	<i>Pazo de Familia</i>	Family, love, business, police investigation, revenge.	Journalism, social classes, social services, rights of secretaries, bastard children, corruption, abortion.
8	<i>Hotel Almirante</i>	Love, family, police investigation, suspicion, intrigue.	Suicide, postwar, local manners (<i>costumbrismo</i>).
9	<i>Casa Manola</i>	Family, business, love, humor, tangles.	Health, solidarity, rural tourism, generational conflicts.
10	<i>Padre Casares</i>	Love, rivalry, sexuality, gossip, family.	Religion, illegal immigration, taxes, old age.

Source: Obitel Spain

3. Transmedia reception

This section explores the transmedia tactics developed by *El Ministerio del Tiempo* (*MdT*, La1) and the interaction between community managers and fans of the series on the official Facebook page. Co-produced by Onza Entertainment and Cliffhanger for TVE, the series follows the adventures of the workers of a secret Ministry created to safeguard the development of Spanish history.

The series has been considered one of the most bold and innovative proposals of domestic fiction.

The transmedia universe is originated in the TV network itself, with an on-line microsite at the core of their 2.0 strategy. The website offers news, promotes calls to action like their “basic training course for civil servants and rookies”, encourages participation in the official forum, provides full-length videos of the fiction and links to other web resources. In addition, the microsite hosts *La Puerta del Tiempo*, a biweekly on-line show in which the guests respond to questions from fans. The strategy combines open accessibility to content platforms such as Facebook and Twitter with restricted accessibility of spaces such as Instagram presented as a “Confidential File”. In the WhatsApp group formed by interns of the Ministry, some fans offered their “selfless collaboration to promote special content through different social networks” (Establés and Rivera, 2015:212).

The followers are strongly committed to the series, as shown in their involvement in the creation and management of several Facebook, Twitter or Tumbler accounts and different types of merchandising, including *fanart* (like *fanfics*, *fanvids* or *fanpics*), podcasts, and an automated generator of fan certificates. As per Varona and Lara (2015), fans are satisfied with the treatment their artistic creations have received from the official sources. For example, some works have been selected to become part of the official products as the second season begins, while respecting the copyrights of their creators.¹⁷ The production has also escaped the virtual boundaries by reaching the classrooms of secondary and higher education, involving community managers of cultural institutions to “offer material regarding the weekly episode”, such as the National Library (Cascajosa, 2015:xii), and organizing events and fan meetings.

However, the greatest achievement of the *ministéricos* during this first season has been the show’s renewal after an on-line

¹⁷ See http://cultura.elpais.com/cultura/2016/02/12/television/1455316387_655802.html.

mobilization organized around the hashtag #TVRenuevaMdT. The decreasing consumption of linear television among young people, a global trend¹⁸, justifies the modest numbers achieved on the traditional measurement system (2,535,000 viewers and 12.30% of share) and explains the various programming changes of the show. The social on-line buzz generated week after week and the number of on-line views confirm the new viewing habits of Spanish society and the need to question the representativeness of the current audience measurement system.

The value of the community manager

Unlike what happened in previous years (Lacalle and Castro, 2016), the interaction between community managers (CM) and internet users seems to have improved in *MdT*. This is due to the creation of the character Aurelio Pimentel (Agustin Alonso), an employee of the Ministry responsible for managing their social media.

A month before the premiere, the official Facebook CM began to promote the show by publishing photographs of the cast, sneak peaks, and highlights of Spain's history. The excitement generated, reinforced by comments that appealed to the viewer's emotions (e.g., "At least two of the scenes will make your hair stand on end"), explains the multiple responses regarding the release date or the possibility to watch it from abroad.

During the broadcast, the CM conversed with users to confirm changes in programming, indicate the inability to include English subtitles, support the ideas of fans related to the creation of merchandising (e.g., t-shirts), reflect on the influences of other texts identified by users (e.g., *La torre de los siete jorobados*), and thank users for their suggestions and the detection of errors. Also, the CM complemented some messages related to specific scenes by providing links and sometimes included information about his own character, Aurelio Pimentel. For example, in response to a melancholic

¹⁸ The study covers 20 markets, including Spain.

comment by an internet user after seeing a similar tricycle to the one from their childhood, the CM answered: “You have no idea how hard it was to get used to this kind of thing when I first arrived at the Ministry”. Regarding the language used, the CM is committed to a colloquial register (e.g., “damn!”), including juvenile lexicon (e.g., “cool”), to appeal the community of fans.

The work done by the CM extends to other websites and continues after the season has ended. For example, in the official forum, the user named “tve” feeds back diverse comments from internet followers, such as a request to maintain the subtitles made by someone with hearing difficulties, or the posts questioning the historical accuracy of the series. The participation of the producer and co-creator on on-line discussions has also promoted the activity of fans in the Facebook group “Civil servants from the Ministry of Time” (Meléndez and Sedano, 2015). However, an analysis by Rodríguez-Mateos and Hernández-Pérez (2015:111) about *MdT* Twitter activity concludes that the main action of the official accounts “is to retweet messages, rather than writing original ones”.

In short, *MdT* responds to new viewing consumption patterns, both from the point of view of transmedia engagement as well as transmedia distribution (Evans, 2011). The series has become a key example of the extension of Spanish television fiction into the internet. It confirms the commitment to transmedia experiences the public broadcasters initiated with successful fictions such as *Águila Roja*. Producers have announced that this transmedia universe will be expanded in the second season with the creation of a video blog by the secretary of the Ministry (Angustias), the release of a podcast starring Julián, a newsletter distributed via Telegram, a ministerial intranet and the development of the first globally interactive virtual reality episode of a series, among other initiatives.¹⁹

¹⁹See <http://www.rtve.es/television/20160203/ministerio-del-tiempo-amplia-su-universo-transmedia-contenidos-exclusivos/1295420.shtml>.

4. Highlights of the year

A choral series (22 titles) set in present times (20 titles) and located in both large cities (14 titles) and small towns (14 titles) is the prototypical fiction that can be extrapolated from the 37 titles premiered in national networks during 2015. In addition, it becomes clear that serials and noble formats (TV movies and miniseries) tend to associate drama and settings in the past.

Fictions from Antena3 are the top average performers in 2015, although Tele5 leads the ranking by channel and most watched fictions. The ten premiered titles in the Atresmedia network obtained an average share of 17.1% (2,857,000 viewers), compared with 15.2% (2,490,000 viewers) achieved by Tele5. Both channels have premiered ten titles each. La1 is in third place, with an average of 11.0% (1,916,000 viewers) and 12 premieres.

Tele5's police show *El Príncipe* (4,610,000 viewers and 24% share), a series set in Ceuta and articulated around the fight against jihadist terrorism, leads the ranking for the second consecutive year, placing six of its ten episodes among the fifty most-watched broadcasts in 2015. Four of the ten most watched titles of the year belong to the police/thriller genre, showing the success of its traditional formulas: *Mar de Plástico* (3,643,000 viewers and 21.4% share), *Bajo Sospecha* (3,640,000 viewers and 18.9% share) and the prison thriller *Vis a Vis* (3,547,000 viewers and 19.9% share), all three aired on Antena3, plus the aforementioned *El Príncipe*. This is a genre firmly committed to innovation as shown in the hybridization of crime, local customs (*costumbrismo*) and humour in *Olmos y Robles* (2,664,000 viewers and 14.5%); the adaptation of Jerónimo Tristante's novels set in the 19th century about police chief *Víctor Ros* (2,342,000 viewers and 11.7% share), in La1; the parable on migratory movements *Refugiados* (1,427,000 viewers and 7.4% share), a British co-production aired in LaSexta; and the incursion of Cuatro in the alarmist intrigue with *Rabia*, about an epidemic that evokes some aspects of zombie stories (908,000 viewers and 6.5% share). Even the most innovative fiction of the year, *El Minis-*

terio del Tiempo (2,535,000 viewers and 12.3% share), La1, to which we devote the third and fifth sections of this report, combines mystery, fantasy and travelling through Spain's history.

Another novelty in 2015 is *Los Nuestros* (3,649,000 viewers and 19.6% share), a suspenseful action series telling the story of two Spanish children kidnapped in Mali and the rescuing efforts of the army. Impeccable and fast-paced, the miniseries by Tele5 includes, for the first time, professional soldiers in the cast and was partly shot in the international military base in Bamako.

Comedy also offers interesting new features. Using regional stereotypes, *Allí Abajo* (4,283,000 viewers and 22.5% share), inspired by the film *Ocho Apellidos Vascos* (Juan Botella, 2014)²⁰, this sitcom by Antena3 is the second most watched fiction of the year. *Algo que Celebrar* (2,569,000 viewers and 14.2% share) is another innovative proposal by Tele5, showing eight autonomous stories in several episodes, each one structured around a celebratory event. Tele5 succeeds with *Anclados* (3,351,000 viewers and 18.9% share), a motley patchwork of disparate characters on the same lines as the incombustible *La que se Avecina* (4,040,000 viewers and 23.6% share).

At the regional level, the good reception of *Merlí* (561,000 viewers and 18.3% share) is remarkable. It is a TV3's drama set in a school and mostly targeted to youth, which in 2016 will premiere in Castilian in Atresmedia. Also worth mentioning is the farewell to the pioneer serial *Goenkale* (15,000 viewers and 3.5% share) after 21 consecutive years in ETB1. The show became a breeding ground for actors and professional workers, and its first steps in 1994 led the vanguard of Spanish television fiction.

That path culminates in 2015 with the opening of new markets in the Far East, Nigeria and Iran, among other places, and a significant increase in the number of adaptations and sales. In early

²⁰ Besides being the top grossing Spanish film of all time, in November 18, 2015 it also became the most watched movie on television over the last 20 years, when the simulcast premiere in Tele5 and Cuatro reached 8.3 million viewers (47.5% share).

2015, producer FilmPool bought the format *El Príncipe* (Tele5) to be adapted in Germany. RTI society, owned by Mediaset Group, bought from Tele5 the option to create Italian versions of *La que se Avecina* and *El Chiringuito Pepe*. The latest has also captured ABC's attention, and the network has acquired the rights of an American remake. *Allí Abajo* (Antena3) will adapt the Spanish regional stereotypes to Ukraine's cultural environment. Fox is considering to purchase the format *El Ministerio del Tiempo* (La1), whose original version has been sold, among many other countries, to Japan, China and Taiwan.

During this year, we have also witnessed the success of some adaptation of Spanish big hits from previous seasons, such as the German and Peruvian versions of *Polseres Vermelles*.²¹ The Italian network Canale 5 has successfully released its own version of *Los Misterios de Laura* (TVE1), as it was the case with Russian Channel 1. New Media Vision, the producer that adapted *Los Misterios de Laura* for NBC, has bought the rights of *Cuéntame Cómo Pasó*. The Italian remake of *Gran Hotel* (Antena3) premiered in RAI1 in September and will have an English version in the American market through Televisa. The story will be set in Cuba, just before Castro's revolution. When it comes to airing the original format, the French network M6 has bought the rights of *Los Nuestros* (Tele5). *Velvet* (Antena3) will air on Chinese channel CCTV. Serial *El Secreto de Puente Viejo* (Antena3)²² and *Acacias 38* (TVE1) enjoy enormous popularity in Italy and are getting even better results in Canale 5 than in Spain.

The international projection of Spanish fiction is also evident in the different recognitions received abroad. So, while some emblematic titles from previous years as, for example, *El Tiempo entre*

²¹ *Club der Roten Bänder* (Vox), the German version of *Polseres Vermelles*, was chosen as the best drama series on the 2015 German Television Awards.

²² *El Secreto de Puente Viejo* received the Italian award to the best fiction in the Grand Prix Corallo in 2015. Between Spain, Italy and Chile, the series audience reaches 10 million viewers (http://cultura.elpais.com/cultura/2016/02/19/television/1455881898_422933.html).

Costuras (Antena3), *Los Misterios de Laura* (La1) or *Polseres Vermelles* (Antena3) remain the subject of international awards, police show set in the 19th century *Víctor Ros* (La1) has won the Silver Globe in the Entertainment World Media Festival in Hamburg. The Spanish-British co-production *Refugiados* has been awarded the Reflet d'Or for Best International Series at the International Film Festival Tous Ecrans (Switzerland). *El Secreto de Puente Viejo* (Antena3) and its protagonist, Maria Bouzas, have also been awarded in the Grand Prix Corallo (Italy). Belén Rueda has won the Golden Nymph at Monte Carlo Festival as best comedy actress for her role in *B&B*. Finally, it is noteworthy the International Emmy nomination of Cuatro's serial *Cita a Ciegas*.

5. Theme of the year: (re)invention of TV fiction genres and formats

January 2016 marks the 50th anniversary of *Historias Para No Dormir* (La1), considered the first domestic fiction that “gave glory and national awards” to Spanish television (Villanueva, 2005:147). After the arrival of democracy, TVE stressed its pedagogical vocation with biopics (*Ramón y Cajal*) or literary adaptations (*Fortunata y Jacinta*), which in the 80s coexisted with other realist series (*Anillos de Oro* or *Turno de Oficio*). By the mid-90s, comedies like *Farmacia de Guardia* (Antena3), *Médico de Familia* (Tele5) or *Pepa y Pepe* (TVE) helped consolidating the audiovisual industry, while domestic fiction was renewed through new formats (e.g., sitcoms) and new topics that pushed the boundaries of the settings beyond studio locations (e.g., *Periodistas* or *El Comisario*, Tele5).

At the turn of the century, the rise of entertainment formats and increased American fiction after the liberalization of the television market stagnated Spanish production, whose recovery was enhanced with the transition to digital television in 2008. Since then, fiction has diversified its formats (sketches, TV movies, miniseries, serials, webseries) and genres (historical, detective, thriller and hor-

ror), and more and more often transcends national barriers. PSOE's interest (2008-2011) in recovering the historical memory partly explains the rise of fictions set in the second decade of the 20th century (e.g., *14 de Abril. La República*, La1), targeting an audience "ready to review the past and challenge preconceived ideas" (Rodríguez-Mansilla, 2015:76).

The decrease in the number of miniseries from 2010 (13 titles) to 2015 (five titles) finds its corollary in the 200% increase of serials over the same period, although the series is still the predominant format (58.3% and 130 programs). The high costs of stories set in the past and the effects of the crisis, more pronounced in the regional channels, also explain the reduction in the number of titles in the last six years, which have gone from 48 to 37. With regard to genre, viewers are progressively favoring police shows or thrillers, aggravating the decline of drama. Thus, while in 2010 seven dramas were among the top ten most watched programs, in 2015 there is only one.

Beyond genre and format trends, the common denominator of Spanish fiction lies in its cultural proximity and eagerness to satisfy a diverse audience. In this environment, the Olivares's brothers²³ bet on an authored fiction (*El Ministerio del Tiempo*) that reflected their experience in theater and national series, like *Los Serrano* (Tele5), *Doctor Mateo* (Antena3), *Isabel* (La1), and auto-nomic ones, such as *Infidels* or *Kubala, Moreno i Manchon* (TV3), with families as their main target. This is a program in line with the Spanish recovery of collective memory that could be included in so-called "New Golden Age" (Smith, 2006), initiated following the decision of former Socialist Prime Minister Jose Luis Rodriguez Zapatero to address the low quality programming, as noted Rodríguez-Mansilla (2015).

In a context typically reluctant to mix genres and, until this year, alien to time travelling as the main ingredient of the story, *El Minis-*

²³ Unfortunately, Pablo Olivares, writer and Javier's brother, died shortly after finishing the revision of the screenplays of the first season of *MdT*.

terio del Tiempo (MdT) is committed to hybridising science fiction, fantasy and adventure.²⁴ The eight episodes of the first season rescued fragments of Spanish culture and history, from 1491 (“Una negociación a tiempo”) to 1981 (“El contrato del Guernica”), without following a linear timeline. In the first installment (“El tiempo es el que es”), the plot takes place in 1808, when a Napoleonic soldier intends to kill *El Empecinado* with the intent to change the outcome of the Independence War; the third episode (“Cómo se reescribe el tiempo”) advances until 1940 at the peak of European fascism; and the last one (“La leyenda del tiempo”) returns to 1923 to show the coexistence of Lorca, Dalí and Buñuel in the Student Residence in Madrid. This type of time structure allows Javier Olivares to say that *MdT* is “a series of several epochs” (García, 2015:181).

Secondary plots focus on the articulation of well-defined characters, which appeal to the emotional intelligence of the audience through their own life drama. Thus, Alonso de Entreríos (Nacho Fresneda), personification of the more traditional Spain, is a 16th century soldier who manages to elude his death sentence after being recruited by the Ministry of Time and suffers the penalty of not being able to be with his wife and raise their child. Amelia Floch (Aura Garrido) is a Catalan intellectual of the 19th century, fleeing from a corseted time with which she cannot identify. Julián (Rodolfo Sancho), a paramedic from 21st century Madrid, who is trying to overcome the accidental death of his wife, represents “the imaginary of the viewer” (Pérez, 2015:234). The three characters that make up the patrol Ministry are joined by Irene Larra, a woman from the 30s who lives her homosexuality freely and independently, and Lola Mendieta, a former agent of the Ministry who represents “the figure of the anarchist” (Carrión, 2015:68).

Despite their differences, the three protagonists share their need to “escape their lives” (Vázquez, 2015:126). However, paradoxically, they cannot help go back to either relive past moments

²⁴ *Refugiados* (LaSexta) are also time travellers, but, in this case, they are coming from the future.

(especially Julián) or discover moments they failed to live (as it happens to Amelia). These personal trips to the past and the stories of which they are protagonists alter the temporality of the plot and provide new layers of depth that enrich the initial stereotypes. Thus, the seventh episode (“Tiempo de venganza”) is built around eight anachronisms set between the Middle Ages and the 19th, 20th and 21st centuries to explain how the patrol prevents the dissolution of the Ministry intended by Leiva, a former agent who blames the Ministry for the death of his son. The use of chronotopes guides the viewer along this temporal experience, while subdividing the screen allows following the adventures of the characters that occur simultaneously in different years and spaces.

The wide range of artistic references (literary, pictorial, film, etc.), popular culture mentions (e.g., a viral joke about the immortality of Jordi Hurtado, host of the long-running quiz show *Saber o Ganar*) and social issues (e.g., the privatization of health and education) offer different layers of meaning, depending on the cultural background of the viewer (Pérez, 2015:238). From the point of view of scenography, the show combines real scenarios near the production center located in Madrid, with digital and built sets that retrieve elements from other productions (Garcia, 2015:187). Also, due to the different periods visited throughout the show, the production team digitally altered real scenarios to remove anachronistic details. The two Arri Alexa cameras used in the recording, the shooting schedule (eight pages of script per day) and the fact that post-production ran parallel to shootings (Liebana, 2015) significantly close the gap between television and cinema.

MdT intends to attract young audiences with a transmedia and educational product that “is constantly reviewing the history of Spain in front of the audience whenever the patrol begins a new mission” (Rodríguez-Mansilla, 2015:77). The program premiered in prime time on Tuesdays to replace the period police minise-

ries *Víctor Ros* (La1)²⁵, in the same time slot as another police series, *Bajo Sospecha*, which aired without commercial breaks on Antena3. The share of 14.8% obtained in the first confrontation (versus 19.6% of *Bajo Sospecha*) determined the relocation of the series on Monday's prime time at 10 p.m. With this new location, the second episode of the fiction lost 1.9 points when competing with two premieres: reality show *Casados a Primera Vista* (Antena3) and adventure miniseries *Los Nuestros* (Tele5).

Despite the modest audience results, the public recognition of *MdT* is highlighted in the seven Goyas and more than 30 awards and designations obtained, such as: the Critics Award to the best fiction in 2015 for its original screenplay and narrative innovations at Festival of Vitoria; the award for best director in television series at the Gold Panda Awards; the Ondas award to the best Spanish series of 2015; and the Alma Award to best screenplay. Another indicator of the success of *MdT* is its international repercussion. Thus, despite 70 minutes being a limitation to export because "there is no time slot for that length" (Olivares in García, 2015)²⁶, United States and Portugal will adapt to their historical contexts a fiction that has also raised interest in Germany, Italy, France, China and Latin America.²⁷

The second season announced new features, like the increase in the number of episodes (13 in 2016) or the lesser role played by Julián (due to the actor's conflicting schedule), and removes the obligation to introduce one historical character per episode. Lope de Vega and Velázquez, two of the most acclaimed figures by the fans, will share the screen with El Cid, Cervantes, Felipe II and Cristóbal Colón, as well as 50 fans (*ministéricos*) who participated as extras in an episode about the Spanish flu. The writing team will be expanded

²⁵ Miniseries *Víctor Ros* is an adaptation of the novels by Jerónimo Tristante, whose protagonist is the homonymous character. Javier Olivares is head writer.

²⁶ See <http://www.elcomercio.es/aviles/201508/02/television-esuna-sena-laidentidad-20150802002310-v.html>.

²⁷ See http://www.elconfidencialdigital.com/medios/TVE-Ministerio-Tiempo-Unidos-Portugal_0_2660133961.html.

with names like David Sáinz, from the webseries *Malviviendo*, or Borja Cobeaga and Diego San José, from the film *Ocho Apellidos Vascos*.

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UNITED STATES: HISPANIC TELEVISION BETWEEN REINVENTION AND TRADITION¹

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1. The audiovisual context of the Hispanic TV in the U.S. in 2015

The year 2015 brought too many changes and transformations across all areas of the industry. Media corporations underwent structural changes, expanded their reach to new markets and improved their strategies on the digital realm. New programming agreements broke away from three decades inertias, while others got consolidated. Some television networks are reinventing themselves, by promoting their brands with a new programming perspective, others change owners' hands and name, others are transformed, and others disappear. In relation to the technological challenge that networks are facing, they continue with an aggressive strategy gear towards digital products, in different modalities. In this context, the reinvention of fiction genres is, in fact, the result of the new technological, industrial and commercial environment, in which audiences' demands are forcing the networks to deploy new programming strategies.

¹ On behalf of Obitel, we want to express our profound recognition to Brad Poretzkin, vice-president and national leader at TAM Nielsen, Theresa Smith, from Client Solutions in Local Media at Nielsen Media Research, and Genesis Giraldo and Jose Miraya, from the Client Solutions in Local Media team at Nielsen Media Research, for their help in this study and for their invaluable contribution to the field of Hispanic television research.

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1.1. Open television in the United States

The year 2015 was marked by expansion, transformation, challenges and many changes. Some networks had a decisive audience growth, while others underwent through important audience decreases. This year, there are seven national open TV networks in the U.S.: Univision, Telemundo, UniMás, Estrella TV, MundoMax, Azteca and Vme.

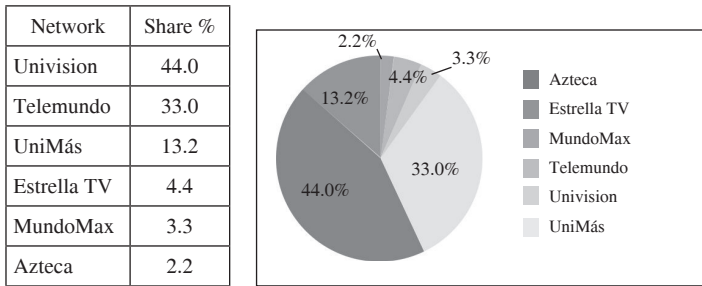
**Chart 1. National broadcasting networks/channels
in the U.S. Hispanic TV**

PRIVATE NETWORKS/CHANNELS(6)	PUBLIC/PRIVATE NETWORKS/ CHANNELS (1)
Univision	Vme
Telemundo	
UniMás	
Estrella TV	
MundoMax	
Azteca	
TOTAL NETWORKS = 6	TOTAL NETWORKS = 1

Source: Obitel USA

Even though the numbers of Hispanic television networks keep growing in cable and digital platforms in the U.S., the number for national broadcasting television remains stable since the year 2012, when former MundoFox joined the group. There have been mostly corporate changes and the rebranding of networks, as is the case of MundoFox, which now is MundoMax, and the decision of Azteca America of taking away the “America” part to concentrate in the brand “Azteca”. In contrast to the other six networks, Vme is a hybrid network, with private and public ownership, and with a different business model.

Graph 1. TV audience and share by network



Graph 2. Offer by genre in TV programming

Genres broadcast	%
Fiction	43.6
Entertainment	16.0
Talk shows	9.3
News and information	11.7
Sports	5.3
Reality TV	2.1
Children programs	1.9
Comedy	4.1
Game shows	1.2
Education	0.5
Others	4.3

Source: Obitel USA – Nielsen

Fiction still is the television genre with more presence in the television lineup, with 43.6%. This category is integrated by 13.4% of films and 30.1% of *telenovelas*, series, miniseries and *unitarios*. Even so, 30.1% of fictional programming represents the double of the offer in relation to the next most visible genre, with 16%, followed by news, with 11.7%. Talk shows have 9.3%. These four genres – fiction, entertainment, news and talk shows – represent 80.6% of the programming offer.

Univision Communications Inc. keeps a corporate growth as a central strategy in order to face the challenges and the changing landscape of the television industry and the audiences' demands.

It maintains its position as the Hispanic TV leader, with 44% of audience share, but decreasing its share in relation to the 47.1% from 2014. The network keeps using *telenovelas* as the most important product for prime time, while sports, and particularly soccer, is the most important television content on the weekends. Univision reached a special agreement with the National Basketball Association (NBA), but also keeps cultivating and promoting award ceremonies and live events, which generate large audiences, using synergies across the social media, as is the case of *Nuestra Belleza Latina*, *Premios Lo Nuestro*, *Latin Grammy*, *Premios Juventud* and *Premios TV y Novelas*. Univision launched its reality TV and game show, *Me Pongo de Pie* and *La Banda*, which had in its premiere day more than four million viewers (Univision network reaches, 2015). Also this year the network decided to cancel the oldest Hispanic television program, *Don Francisco*. The program's farewell had 6.7 million viewers (TVbytheNumbers, 2015). In 2015, Univision and Televisa extended their programming agreement until 2030. In contrast, Univision paid Venevisión for the termination of their programming agreement, which allowed Venevisión to look for another television network to distribute its programming in the U.S.

UniMás remained as the third Hispanic television, with an audience share of 13.2%, keeping the same level of 2014, when its share was 13.3%. The network maintained a programming strongly dependent on Hollywood films and also offered sports, where its program *Boxeo Total* stands out, which competes with other versions of boxing programs from Telemundo and Azteca. In terms of Latin American productions, UniMás has been a window for Colombian, Venezuelan and Mexican productions. Given the cancellation of the programming agreement between Univision and Venevisión, UniMás cancelled three shows produced by the Cisneros Studios.

In 2015, Telemundo not only solidified its position as the second Hispanic network but also, for the first time in history, was able to challenge Univision at prime time, which has had the hege-

monic position in Hispanic television. Telemundo reached 33% of audience share, a result above that of 2014, which was 29.4%. The network maintained the strategy of including soccer in the programming lineup on the weekend, offering the Mexican Soccer League matches when Univision/Televisa does not have the exclusive distribution rights in the U.S. Telemundo complements these matches by offering the European Premier League and exclusive international contests, such as the FIFA Women's World Cup and the U-17 World Cup. Also, the network offers a boxing program that was launched in 1989 and now, under sponsorship, is titled *Boxeo Telemundo Ford*. Like Univision, Telemundo also bets on live events, with the production of *Premios Lo Nuestro* and *Latin American Music Awards*, which reached 3.8 million viewers (Fernández, 2015). In 2015, the network had good results with the third season of *La Voz Kids*. However, at the beginning of 2016, it lost Joshua Mintz, the programming and script vice-president and general manager of Telemundo Studios, who accepted a work proposal from Azteca Mexico. Joshua Mintz was in charge of Telemundo's production strategy and played a central role in bringing talent with international visibility for its *telenovelas*, mainly from Mexico, and in the historic success achieved by the network regarding fiction production.

Estrella TV maintained its position as the fourth Hispanic network, with 4.4% of audience share, but with a decrease of 5.1% if compared to 2014. Estrella TV is a subsidiary of Liberman Broadcasting Inc. (LBI), a broadcasting company also owner of a radio network. LBI is considered a media property of social minorities, in this case Hispanic, father and son, José and Lenard Liberman. Estrella TV grew in audience with the production of game shows and reality TV, the signing of new programming agreements with Cisneros Media (Venevisión), as well as new agreements with producers for the making of original programming. It is so that, in 2015, the company announced the launching of a new multichannel network, Estudios Fenómeno, as an incubator of ideas through YouTube and digital platforms that have the potential for a crossover for television.

The network, through an agreement with Golden Boys, started the transmission of a series of boxing events titled *LA Fight Club*. The visibility of its programs – such as nightly *Noches de Platanito*, its reality TV contest *Tengo Mucho Talento* and its docureality *Rica Famosa, Latina* – allowed the network to avoid expensive fiction formats, which require famous professionals, finding its business model mostly in the production of low cost original programming. However, this scheme is about to change with the new agreements with Cisneros Media. Estrella TV will make a programming agreement with Venevisión, which will allow the network to include *telenovelas* such as *Rosario*, *Talismán* and *Amor Secreto* in its lineup for 2016.

MundoMax (formerly named MundoFox) keeps its position as the fifth Hispanic network, with 3.3% of audience share in 2015, slightly above the 3.1% of 2014. In July 2015, RCN Colombia bought the participation of Fox International Channels (FIC) in MundoFox, which both had launched together in 2012. Before this ownership adjustment, RCN changed the name of the network to MundoMax and promoted Ibra Morales as the new CEO. At the end of July, and as a consequence of the corporate change, the network fired all its news division. As part of the ownership change, MundoMax started a restructuring of its agreement with its affiliated stations. In spite of the acquisition by RCN Colombia, MundoMax maintained its strategy of programming Colombian *telenovelas*, but also with the array of productions from other countries, such as Brazil, Mexico and Turkey.

Azteca, despite the increase in audience, still positioned as the sixth network, with 2.2% of audience share in 2015 – a result above the 2% reached in 2014. Azteca is a subsidiary of Mexican media corporation TV Azteca, a segment of Salinas Group corporations. In 2015, TV Azteca saw its audience share decline, with low ad sales and a financial crisis that resulted in the cutting of the original *telenovela* production. Somehow Azteca's operation in the U.S. is isolated from the financial situation in Mexico. Regarding program-

ming, TV Azteca premiere *telenovelas* have not increased the ratings; however, the network keeps an important part of the audience with the Mexican League soccer matches. The network has established a programming lineup with game shows at 7 p.m., reality TV from 8 p.m. to 10 p.m. and drama at 10 p.m. However, instead of fiction, there are other television genres that are considered the top shows of the network, such as *Escape Perfecto* (game show), *Al Extremo* (reality TV), and *League MX* (sports).

The seventh network is Vme. While the first six networks are commercial and private, Vme is hybrid, because it has private owners, but with public investments from channel Thirteen, a property of WNET, from the Public Broadcasting Service (PBS). The fact that Vme takes advantage of the national distribution infrastructure of PBS, through the digital sub-channels from its affiliated station, ensured Vme a national coverage. Regarding fiction, prime time is not filled by Latin American *telenovelas*; instead, the network offers dramas and series, mostly productions with international awards or acclaimed by television critics, largely based on what is produced in Europe.

1.2. Audience trends in 2015

In 2015, Telemundo had great audience advances because its programming strategy of lining up Super Series at prime time has been yielding good results since 2012. Following a history of share offered by Obitel (Obitel.net), Telemundo has maintained an audience increasing trend from 22% in 2012 to 27.3% in 2013, 29.4% in 2014 and 33% in 2015. In the last four years, Telemundo jumped 11 points of share, which represents almost 50% of its own share. In contrast, there has been a decrease in the hegemony of Univision in the same years. Univision had a share of 55.6% in 2012, 49.5% in 2013, 47.1% in 2014 and 44% in 2015. For Univision, this decline represents a loss of 11 points, almost equivalent to Telemundo's increase in the same period, which represents almost 20% of loss for Univision. UniMás has maintained a stable trajectory with a small

loss in the last years. It had 15.3% of audience share in 2012, 13.9% in 2013, 13.3% in 2014 and 13.2% in 2015. This represents a loss of 2 points, which is around a 10% decrease in audience share (Obitel.net).

Meanwhile, Estrella TV stopped its upward trajectory in 2015. The network, which was recently launched at national level, had an audience share of 3.2% in 2012, 4.9% in 2013, 5.1% in 2014 and 4.4% in 2015. MundoMax, launched in 2012, has shown a slow but sustained growth of audience share: 1.4% in 2012, 1.7% in 2013, 3.1% in 2014 and 3.3% in 2015. Even though they may be considered marginal increases, MundoMax has grown its audience share in 100% in the last years. Finally, despite not surpassing certain range of audience share, Azteca has seen ups and downs in the last years. The network had a share of 2.4% in 2012, 2.8% in 2013, 2% in 2014 and 2.2% in 2015 (Obitel.net).

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

Univision Communication Inc. revenues amounted to 2.8 billion dollars in 2015, below the 2.9 billion dollars reported in 2014. Only in the segment of advertising, the corporations reported an income of 1.9 billion dollars, in contrast with 2.1 billion dollars in 2014. This represented a decrease on advertising revenues of 9.4% (4Q Univision Corporate, 2015). Meanwhile, NBC-Universal (NBC-U), owner of Telemundo, reported an increase of 11.9% in revenues, with a total of 25.5 billion dollars, a segment of the 74.5 billion dollars revenues from Comcast, the matrix corporation (Annual Report NBC-U, 2015). Azteca in the U.S. (formerly Azteca America) presented an increase of revenues of 284 million pesos in the first quarter of 2015, 261 million pesos in the second quarter, 243 million pesos in the third quarter and 290 million pesos in the fourth quarter, which represented an increase of 6%, 31%, 26% and 18% respectively in relation to the same periods in 2014 (TV Azteca, 2015).

1.4. Merchandising and social merchandising

The relationship of advocacy that Hispanic networks set with their targeted audiences, at local and national levels, is a key element in the construction of these channels identity. This position of the networks seeking to stay closer with the Hispanic communities has been an answer to the way in which this population was ignored by the national English-speaking networks. This approach is a crucial factor in the marketing and selling process with local retailers at local levels with their potential buyers. Univision launched the campaign “Univision Contigo”, offering recommendations and resources of information across four different main themes: education, health, prosperity and participation. Under Univision Contigo, the corporation launched in 2015 different support campaigns aimed at the Hispanic community for business development, access to credit, access to health services, information for Hispanic citizenship empowerment through political vote and educational development. Meanwhile, Telemundo incorporated a sub-plot with Andrés Cabrera in its *telenovela Bajo el Mismo Cielo* in order to raise consciousness of type 2 diabetes. The network also developed campaigns for economic empowerment (“Tu dinero es tu futuro”), health (“Prevenir es vivir”), immigration and citizenship (“Participar es progresar”) and the promotion of vote (“El voto Latino: mito vs realidad”). Azteca made an effort to move closer to the Latino community, working with Azteca Foundation to create “Esperanza Azteca Orquesta de Jovenes”, which seeks to empower young Latinos with low resources through music within Los Angeles.

1.5. Communication policies

The most important change in communication policies has been the position taken by the Federal Communications Commission (FCC), in February 2015, regarding “net neutrality”, in which the commission supports the White House proposal of considering the internet as a basic utility for households, status that prevents internet providers to establish differentiated package services in re-

lation to the speed of the internet provided. While FCC aligns with the White House and Silicon Valley to create an egalitarian environment for the internet, due to its key role in creativity, innovation and all the possibilities of development for the population and oncoming generations, telephone companies (internet service providers) see in this measure an obstacle and attack against the laws of supply and demand as well as against the possibility to create better internet services based on differentiated rates and free competition for consumers, between corporations such as Comcast, TimeWarner Cable, etc.

1.6. Information and Communication Technology (ICT) trends

In March, magazine *Forbes* offered an overview of the main trends regarding information and communication technologies, particularly in relation to television, in which describes how new media consumption dynamics of millennials (people who became adult near year 2000) are wreaking cable TV. In particular, Mark Huges argues that, although services such as TiVo and Netflix had already threatened the supply, the fact that Netflix has become a producer of original programming, coupled with several recent negotiations between HBO and Showtime to offer their programming through applications or streaming services, makes connecting to cable irrelevant due to its programming supply. *Forbes* quotes the “Digital Democracy Survey”, which affirms that 37% of U.S. consumers have tablets, laptops and smartphones, and that millennials are responsible for triggering the pulling of cable, because they consume 54% of television content in the second screen. Furthermore, the majority of millennials look for information online, between 41% and 51% send text messages, 48% use the social media – and all these activities are done while watching television. It means that 86% of them are doing something else while watching television (Hughes, 2015).

1.7. Public TV

Using the infrastructure of Public Broadcasting Service (PBS), Vme managed to achieve national visibility by being broadcast in

the PBS affiliate stations' digital sub-channels or through cable systems, with a programming supply in Spanish language, targeting the Latino population in particular. The public character of Vme made the network mission to educate and inform. This mission, and having PBS as the main source of programming, results in a strategy different from that adopted by other Hispanic television networks. The network programming offers content on life style, documentaries, public issues, but also children programming, which resulted in the creation of Vme Kids.

1.8. Pay TV

The universe of pay television targeting Hispanic population has grown potentially, from 75 Hispanic networks in 2005 to 147 in 2014. This growth has been accompanied with the emergence of new Hispanic networks, not only in Spanish language, but also in English and in bilingual modality (Piñón and Rojas, 2011). Galavisión (a property of Univision) is the Hispanic network in pay TV with the largest audience in the U.S. It does not present original series, but the lining up of Televisa programming that premiered on Univision or reruns of Univision original production. Among the networks with the highest ratings, following Galavisión, there are Hispanic networks offering original programming, mostly sports. Fox Deportes, ESPN Deportes and now Univision Deportes are the networks in the top of ratings in pay television, mostly due to their programming offer in soccer. Other networks at the top are Discovery en Familia and Discovery Channel, followed by networks specialized in news and information, such as CNN en Español or Fusion, a property of ABC/Disney and Univision, which provides news and targets English-speaking millennial Latinos.

1.9. Independent producers

The role of independent producers in the U.S. Hispanic television industry was consolidated in 2015. Argos has been the key producer for Telemundo. The Hispanic network made agreements

with TeleMexico and Fox Telecolombia. Univision and Televisa have developed production projects with RTI-Colombia and the acquisition of content from Teleset, CMO Producciones and Cannana Films. Meanwhile, MundoMax represents an important window for Fox Telecolombia, Teleset, RTI, Cenpro from Colombia and TeleMéxico. EstrellaTV has relied on the production of Darmex for its original fiction.

1.10. International trends

Turkish *telenovelas* keep expanding through the U.S. Hispanic television industry. This fiction found at MundoMax their initial and main window for distribution. In 2015, the network broadcast four Turkish *telenovelas* at prime time. This year Turkish *telenovelas* also had a space in networks such as Azteca and Telemundo. The visibility of these fictions triggered new experiences by the networks, which broadcast productions made in the Southern/Central and Eastern Europe, in order to know their acceptance among Hispanic audiences. Thus, MundoMax included a Rumanian production in its TV lineup, while Azteca incorporated an Italian one.

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

From a general perspective, during 2015 in the United States, a total of 123 fiction titles were broadcast: 21 premiere titles, 47 premiere foreign titles and 55 rerun titles (Table 1). This year marked a significant 50% increase in national productions compared to 2014. The U.S. produced a total of 21 premiere titles, six of which were fiction products created by U.S. production houses, and 15 were created by co-production agreements with Obitel countries. Those 21 fiction titles represent a 24% increase in comparison with the 17 titles created in 2014. With the 47 premiere foreign titles, the authors observed a 47% increase compared to the 32 titles imported in 2014. This increase resulted from the addition of MundoMax's programming to our annual fiction evaluation for 2015.

Table 1. Fiction broadcast in 2015 (national and foreign; premieres and reruns; and co-productions)

<p>PREMIERE NATIONAL TITLES – 5</p> <p>Telemundo – 3 titles</p> <ol style="list-style-type: none"> 1. <i>Bajo el Mismo Cielo</i> (telenovela) 2. <i>Francisco El Jesuita</i> (miniseries) 3. <i>Tierra de Reyes</i> (telenovela) <p>UniMás – 1 title</p> <ol style="list-style-type: none"> 4. <i>Narcos: Guerra Antidrogas</i> (series) <p>Estrella TV – 1 title</p> <ol style="list-style-type: none"> 5. <i>Secretos</i> (series) <p>CO-PRODUCTIONS – 15</p> <p>Telemundo – 5 titles</p> <ol style="list-style-type: none"> 1. <i>Dueños del Paraíso</i> (telenovela – USA/Chile) 2. <i>Los Miserables</i> (telenovela – USA/Mexico) 3. <i>El Señor de los Cielos 3</i> (telenovela – USA/Mexico)* 4. <i>Señora Acero</i> (telenovela – USA/Mexico)* 5. <i>Señora Acero 2</i> (telenovela – USA/Mexico)* <p>UniMás – 5 titles</p> <ol style="list-style-type: none"> 6. <i>Cosita Linda</i> (telenovela – USA/Venezuela) 7. <i>En la Boca del Lobo</i> (telenovela – USA/Colombia) 8. <i>La Esquina del Diablo</i> (telenovela – USA/Colombia/Mexico) 9. <i>Niño Santo</i> (series – USA/Mexico) 10. <i>Tiro de Gracia</i> (telenovela – USA/Mexico)* <p>Estrella TV – 2 titles</p> <ol style="list-style-type: none"> 11. <i>Jenni Rivera: la Vida de una Diva</i> (miniseries – USA/Mexico) 12. <i>Secretos de Lucía</i> (telenovela – Venezuela/Colombia/USA) <p>MundoMax – 3 titles</p> <ol style="list-style-type: none"> 13. <i>Cumbia Ninja</i> (telenovela – USA/Colombia) 	<p>MundoMax – 12 titles</p> <ol style="list-style-type: none"> 36. <i>Así es la Vida</i> (unitario – Colombia) 37. <i>El Estilista</i> (telenovela – Colombia) 38. <i>Fantasma del Gran Hotel</i> (telenovela – Colombia) 39. <i>Francisco el Matemático</i> (telenovela – Colombia) 40. <i>La Guerrera</i> (telenovela – Brazil) 41. <i>Laberinto de Alicia</i> (telenovela – Colombia) 42. <i>Milagros de Jesús</i> (miniseries – Brazil) 43. <i>¿Quién Mató a Patricia Soler?</i> (telenovela – Colombia) 44. <i>Rastros de Mentiras</i> (telenovela – Brazil) 45. <i>Allá te Espero</i> (telenovela – Colombia) 46. <i>Lado a Lado</i> (telenovela – Brazil) 47. <i>Entérese</i> (unitario – Colombia) <p>RERUN TITLES – 55</p> <p>Azteca – 5 titles</p> <ol style="list-style-type: none"> 1. <i>Cada Quien su Santo</i> (unitario – Mexico) 2. <i>Contrato de Amor</i> (telenovela – Mexico) 3. <i>Lo que la Gente Cuenta</i> (series – Mexico) 4. <i>La Prepago</i> (telenovela – USA/Colombia) 5. <i>La Teniente</i> (series – Mexico) <p>Estrella TV – 2 titles</p> <ol style="list-style-type: none"> 6. <i>Historias Delirantes</i> (series – USA/Mexico) 7. <i>El Talismán</i> (telenovela – USA/Venezuela) <p>Telemundo – 8 titles</p> <ol style="list-style-type: none"> 8. <i>Aurora</i> (telenovela – USA) 9. <i>Avenida Brasil</i> (telenovela – Brazil) 10. <i>El Clon</i> (telenovela – USA/Brazil) 11. <i>Flor Salvaje</i> (telenovela – USA/Colombia) 12. <i>Los Herederos del Monte</i> (telenovela – USA/Colombia) 13. <i>Historias de la Virgen Morena</i> (unitario – USA)
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14. *Capitán Camacho* (series – USA/Colombia/Mexico)

15. *Palabra de Ladrón* (series – USA/Colombia)

PREMIERE FOREIGN TITLES – 47

Azteca America – 14 titles

1. *Así en el Barrio Como en el Cielo* (telenovela – Mexico)

2. *El Astro* (telenovela – Brazil)

3. *Las Bravo* (telenovela – Mexico)

4. *Lo que Callamos las Mujeres* (unitario – Mexico)

5. *El Cordel Encantado* (telenovela – Brazil)

6. *Entre el Amor y el Deseo* (telenovela – Mexico)

7. *Las Huérfanas* (telenovela – Mexico)

8. *La Mujer de Judas* (telenovela – Mexico)

9. *Prohibido Amar* (telenovela – Mexico)

10. *Secretos del Alma* (telenovela – Mexico)

11. *Tanto Amor* (telenovela – Mexico)

12. *UEPA Escenario para Amar* (telenovela – Mexico)

13. *San Francisco y Santa Clara* (miniseries – Mexico)

14. *San Agustín* (miniseries – Mexico)

Telemundo – 1 title

15. *Preciosa Perla* (telenovela – Brazil)

UniMás – 3 titles

16. *La Bruja* (telenovela – Colombia)

17. *El Chivo* (telenovela – Colombia/Mexico)

18. *Los Fugitivos* (telenovela – Colombia)*

Univision – 16 titles

19. *Amores con Trampa* (telenovela – Mexico)

20. *Antes Muerta que Lichita* (telenovela – Mexico)

21. *Como Dice el Dicho* (unitario – Mexico)

22. *La Gata* (telenovela – Mexico)

23. *Hasta el Fin del Mundo* (telenovela –

14. *India: Historia de Amor* (telenovela – Brazil)

15. *Maid in Manhattan* (telenovela – USA)

Univision – 8 titles

16. *Alma de Hierro* (telenovela – Mexico)

17. *Amorcito Corazón* (telenovela – Mexico)

18. *Amores Verdaderos* (telenovela – Mexico)

19. *Corona de Lagrimas* (telenovela – Mexico)

20. *La Que No Podía Amar* (telenovela – Mexico)

21. *Refugio para el Amor* (telenovela – Mexico)

22. *Teresa* (telenovela – Mexico)

23. *Triunfo del Amor* (telenovela – Mexico)

UniMás – 10 titles

24. *La C.Q.* (teledrama – USA/Mexico)

25. *El Cartel de los Sapos* (telenovela – Colombia)

26. *Una Familia con Suerte* (telenovela – Mexico)

27. *Hasta que el Dinero Nos Separe* (telenovela – Mexico)

28. *Hermanos y Detectives* (series – Mexico)

29. *Pablo Escobar el Patrón del Mal* (telenovela – Colombia)

30. *El Pantera* (series – Mexico)

31. *Rebelde* (telenovela – Mexico)

32. *Vecinos* (series – Mexico)

33. *El Ventilador* (series – Colombia)

MundoMax – 22 titles

34. *Café con Aroma de Mujer* (telenovela – Colombia)

35. *Chepe Fortuna* (telenovela – Colombia)

36. *Chica Vampiro* (telenovela – Colombia)

37. *Historias Clasificadas* (unitario – Colombia)

38. *Infames* (telenovela – Mexico)

39. *José de Egipto* (miniseries – Brazil)

40. *Mamá También* (telenovela – Colombia)

Mexico) 24. <i>Lo Imperdonable</i> (telenovela – Mexico) 25. <i>La Malquerida</i> (telenovela – Mexico) 26. <i>Mi Corazón es Tuyo</i> (telenovela – Mexico) 27. <i>Muchacha Italiana Viene a Casarse</i> (telenovela – Mexico) 28. <i>Pasión y Poder</i> (telenovela – Mexico) 29. <i>Que Te Perdona Dios, Yo No</i> (telenovela – Mexico) 30. <i>Quiero Amarte</i> (telenovela – Mexico) 31. <i>Rosa de Guadalupe</i> (unitario – Mexico) 32. <i>La Sombra del Pasado</i> (telenovela – Mexico) 33. <i>La Vecina</i> (telenovela – Mexico) 34. <i>Yo no Creo en los Hombres</i> (telenovela – Mexico) Estrella TV – 1 title 35. <i>Amor Secreto</i> (telenovela – Venezuela)	41. <i>Novia Para Dos</i> (telenovela – Colombia) 42. <i>La Playita</i> (telecomedy – Colombia) 43. <i>Alias el Mexicano</i> (telenovela – Colombia) 44. <i>Amo de Casa</i> (telecomedy – Colombia) 45. <i>A Corazón Abierto</i> (telenovela – USA/Colombia) 46. <i>Corazones Blindados</i> (series – USA/Colombia) 47. <i>Ecomoda</i> (telenovela – Colombia) 48. <i>Joe La Leyenda</i> (telenovela – Colombia) 49. <i>El Mariachi</i> (telenovela – Colombia) 50. <i>La Reina Ester</i> (miniseries – Brazil) 51. <i>Sansón y Dalila</i> (miniseries – Brazil) 52. <i>Secretos del Paraíso</i> (telenovela – Colombia) 53. <i>Tiempo Final</i> (series – USA/Colombia) 54. <i>El Último Matrimonio Feliz</i> (telenovela – Colombia) 55. <i>Yo Soy Betty, la Fea</i> (telenovela – Colombia) PREMIERE TITLES: 20 PREMIERE FOREIGN TITLES: 47 RERUN TITLES: 55 TOTAL TITLES BROADCAST: 122
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* Authors decided to classify the following titles *El Señor de los Cielos 3*, *Señora Acero*, *Señora Acero 2*, *Tiro de Gracia* and *Los Fugitivos* as *telenovelas*. The networks are promoting those titles as series. However, their broadcast schedule, from Monday to Friday, their type of dramatic narration and production style are more similar to the *telenovela* format than to the series format. Nevertheless, the number of episodes and their tendency to produce action drama could lead people to think that this is a new type of fiction that is in an experimental stage, emerged directly from the changes of the publicity/economic business models in the television networks.

Source: Obitel USA – Nielsen³

The Obitel country that produced the greatest number of titles for the U.S. Hispanic market was Mexico, with 39.7% (Table 2). However, compared to 2014, when Mexico produced 46.9%, this year their production decreased by 7.2%. National productions are in second place, with 30.9% and 21 premiere titles, generating

³ Nielsen's data include MundoMax programming.

24.2% of total production hours in 2015. Colombia is in third place, with 16.2% of fiction title productions, representing 12.8% of total production hours.

Table 2. Premiere fiction in 2015: countries of origin

Country	Titles	%	Chapters/ episodes	%	Hours	%
NATIONAL (total)*	21	30.9	993	25.4	954:58	24.2
OBITEL COUNTRIES (total)**	47	69.1	2909	74.6	2987:10	75.8
NON OBITEL COUNTRIES (total)	0	0.0	0	0.0	0:00	0.0
Argentina	0	0.0	0	0.0	0:00	0.0
Brazil	7	10.3	455	11.7	498:40	12.6
Spain	0	0.0	0	0.0	0:00	0.0
Chile	0	0.0	0	0.0	0:00	0.0
Colombia	11	16.2	490	12.6	506:07	12.8
Ecuador	0	0.0	0	0.0	0:00	0.0
USA (Hispanic production)	21	30.9	993	25.4	954:58	24.2
Mexico	27	39.7	1896	48.6	1911:08	48.5
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	2	2.9	68	1.7	71:15	1.8
National co-productions	16	23.5	664	17.0	667:06	16.9
Ibero-American co-productions	2	2.9	53	1.4	56:15	1.4
TOTAL	68	100.0	3902	100.0	3942:08	100.0

* Every fiction title produced by USA production houses and in co-production with other production houses is considered by the authors a national premiere fiction.

** In terms of co-productions between Obitel countries, those fictions were assigned to one country only to avoid double counting. This case is applicable for *El Chivo* (Mexico/Colombia), which was counted as a Colombian production, and *Secretos del Alma* (Mexico/Venezuela), which was counted as a Venezuelan production.

Source: Obitel USA – Nielsen

In 2015, 76% of national production was primarily created through co-productions with Obitel countries. The American media contributed with 16 fiction titles (Table 3). The country with the greatest number of partnerships with the U.S. was Mexico, with nine co-productions. In particular, Argos Comunicación produced four fiction titles for Telemundo. Likewise, Colombia contributed

with eight co-productions, specifically with Fox Telecolombia, creating six fiction titles.

Table 3. Co-productions

	Titles	Co-producing countries	Production houses	Format
USA + Obitel countries	<i>Dueños del Paraíso</i>	USA	Telemundo	<i>Telenovela</i>
		Chile	Televisión Nacional de Chile	
	<i>Los Miserables</i>	USA	Telemundo	<i>Telenovela</i>
		Mexico	Argos	
	<i>El Señor de los Cielos 3</i>	USA	Telemundo	<i>Telenovela</i>
		Mexico	Argos	
	<i>Señora Acero</i>	USA	Telemundo	<i>Telenovela</i>
		Mexico	Argos	
	<i>Señora Acero 2</i>	USA	Telemundo	<i>Telenovela</i>
		Mexico	Argos	
	<i>Celia</i>	USA	Telemundo	<i>Telenovela</i>
		Colombia	Fox Telecolombia	
	<i>Jenni Rivera: la Vida de una Diva</i>	USA	Estrella TV	Miniseries
		Mexico	Darmex	
	<i>Secretos de Lucía</i>	USA	Univision	<i>Telenovela</i>
		Venezuela	Venevisión	
		Colombia	BE TV	
	<i>Cosita Linda</i>	USA	Univision	<i>Telenovela</i>
		Venezuela	Venevisión	
	<i>En la Boca del Lobo</i>	USA	Univision	<i>Telenovela</i>
		Colombia	Teleset/Sony	
	<i>La Esquina del Diablo</i>	USA	Univision	<i>Telenovela</i>
		Mexico	Televisa	
		Colombia	RTI	
	<i>Niño Santo</i>	USA	Univision	Series
		Mexico	Cananas Films	
	<i>Tiro de Gracia</i>	USA	Univision	<i>Telenovela</i>
		Mexico	Televisa	
		Colombia	Caracol	
	<i>Palabra de Ladrón</i>	USA	Fox	Series
Colombia		Fox Telecolombia		
<i>Capitán Camacho</i>	USA	Fox	Series	
	Mexico	Estudios Tele-Mexico		
	Colombia	Fox Telecolombia		

	<i>Cumbia Ninja</i>	USA	Fox	Series
		Colombia	Fox Teleco- lombia	
TOTAL TITLES CO-PRODUCED WITH OBITEL COUNTRIES: 16				
TOTAL TITLES CO-PRODUCED WITH NON OBITEL COUNTRIES: 0				
TOTAL CO-PRODUCTIONS: 16				

Source: Obitel USA – Nielsen

Prime time continued to be the most important time slot for fiction releases in 2015, with 85% of premiere episodes, generating 88% of total hours (Table 4); this same trend was observed in 2014. A similar trend was observed with premiere fiction titles produced by Obitel countries: 55% of episodes were broadcast during the prime time slot, amounting to 53% of total hours. Also, the results indicated that the afternoon was network programmers' second choice, with 28% of episodes, generating 29% of Obitel fiction content in 2015.

In terms of fiction formats, the findings showed that *telenovelas*, with 62% and 13 titles, continued to be the favorite format; this trend was also observed in the previous year. The most significant change in 2015 was a 200% increase of fiction in series format compared to 2014. Fiction created in series format represented 29% of production, with six titles. This finding shows that the U.S. premiere national production is developing a strong preference for producing series. However, Obitel countries prefer to produce fiction in the *telenovela* format, with 81%.

Table 4. Chapters/episodes and hours broadcast by time slot

Time slots	National			Ibero-American			Total		
	C/E	H	%	C/E	H	%	C/E	H	%
Morning (6:00-12:00)	87	87:48	9.2	344	356:10	11.9	431	443:58	11.3
Afternoon (12:00- 19:00)	0	0:00	0.0	824	869:21	29.1	824	869:21	22.1
Prime time (19:00-23:00)	846	837:10	87.7	1584	1587:39	53.1	2430	2424:49	61.5
Night (23:00-6:00)	60	30:00	3.1	157	174:00	5.8	217	204:00	5.2
Total	993	954:58	100.0	2909	2987:10	100.0	3902	3942:08	100.0

Source: Obitel USA – Nielsen

Table 5. Formats of national and Ibero-American fiction

Format	National						Ibero-American					
	Titles	%	C/E	%	Hours	%	Titles	%	C/E	%	Hours	%
<i>Telenovela</i>	13	61.9	839	84.5	839:56	88.0	38	80.9	2840	97.6	2918:14	97.7
Series	6	28.6	150	15.1	111:00	11.6	2	4.3	59	2.0	58:56	2.0
Miniseries	2	9.5	4	0.4	4:02	0.4	2	4.3	10	0.3	10:00	0.3
Telefilm	0	0.0	0	0.0	0:00	0.0	0	0.0	0	0.0	0:00	0.0
<i>Unitario</i>	0	0.0	0	0.0	0:00	0.0	5	10.6	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.)	0	0.0	0	0.0	0:00	0.0	0	0.0	0	0.0	0:00	0.0
Total	21	100.0	993	100.0	954:58	100.0	47	100.0	2909	100.0	2987:10	100.0

Source: Obitel USA – Nielsen

The comparative analysis between time slot and format confirmed that 63% of premiere *telenovelas* were scheduled during prime time (Table 6). Likewise, this preference was also observed with series, with 26% of those programmed at prime time. Those findings showed the same trends observed in 2014, demonstrating that prime time is the preferred time slot for national premieres produced in *telenovela* and series formats.

Moving on to the examination of time period in which fiction productions were set in 2015, findings show that producers have a tendency to set 67% of their productions in the present time (Table 7).

Table 6. Formats of national fiction per time slot

Format	Morning	%	Afternoon	%	Prime time	%	Night	%	Total	%
<i>Telenovela</i>	1	100.0	0	0.0	12	63.2	0	0.0	13	61.9
Series	0	0.0	0	0.0	5	26.3	1	100.0	6	28.6
Miniseries	0	0.0	0	0.0	2	10.5	0	0.0	2	9.5
Telefilm	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
<i>Unitario</i>	0	0.0	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	0	0.0
Others (soap opera, etc.)	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Total	1	100.0	0	0.0	19	100.0	1	100.0	21	100.0

Source: Obitel USA – Nielsen

Table 7. Time period in which fiction is set

Time period	Titles	%
Present	14	66.7
Period	3	14.3
Historical	4	19.0
Other	0	0.0
Total	21	100.0

Source: Obitel USA – Nielsen

The list of the ten most watched titles in the U.S. in 2015 shows *telenovela Mi Corazón es Tuyo*, produced by Televisa, in first place, with 14.1 points of rating and 23 points of share (Table 8). Com-

pared to 2014, the most watched production was *Lo que la Vida Me Robó*, with a rating of 16.5 points, which is 2.5 points higher than the top production in 2015. It is interesting to note that the only U.S. premiere production in this list is *El Señor de los Cielos 3*, with a rating of 10.9 points and a share of 18.6. This series showed an increase in audience in comparison to the previous year, during its second season, when it occupied the seventh place in the list, with a rating of 10 points and a share of 17.

Table 8. The ten most watched titles: origin, rating, share

	Title	Country of original idea or script	Producer	Channel	Scriptwriter or author of original idea	Rating	Share
1	<i>Mi Corazón es Tuyo</i>	Spain	Televisa	Univision	Ana Obregón	14.1	23.5
2	<i>Hasta el Fin del Mundo</i>	Mexico	Televisa	Univision	Kary Fajer	13.1	21.3
3	<i>La Malquerida</i>	Mexico	Televisa	Univision	Ximena Suárez	12.2	20.7
4	<i>Que Te Perdona Dios, Yo No</i>	Mexico	Televisa	Univision	Caridad Bravo Adams	11.2	19.6
5	<i>El Señor de los Cielos 3</i>	USA – Mexico	Telemundo – Argos	Telemundo	Luis Zolkowicz	10.9	19.6
6	<i>Lo Imperdorable</i>	Mexico	Televisa	Univision	Caridad Bravo Adams	10.5	18.4
7	<i>La Gata</i>	Mexico	Televisa	Univision	María Antonieta Calú Gutiérrez, Teresa Medina, Dolores Ortega	10.2	17.7
8	<i>Amores con Trampa</i>	Mexico	Televisa	Univision	David Bustos, María Antonieta Gutiérrez, Jaime Morales, Saúl Pérez	10.1	18.4
9	<i>Yo no Creo en los Hombres</i>	Mexico	Televisa	Univision	Caridad Bravo Adams	9.4	17.2
10	<i>Pasión y Poder</i>	Mexico	Televisa	Univision	Marissa Garrido	9.3	16.1
Total productions: 10				Foreign scripts: 9			
100%				90%			

Source: Obitel USA – Nielsen

The most watched fiction in 2015 was *Mi Corazón es Tuyo*, broadcast during prime time, showing a clear audience preference for Mexican fiction. In contrast, U.S. production *El Señor de los Cielos 3*, with 104 episodes, was in fifth place. The dominant themes represented in *Mi Corazón es Tuyo* were love, deception, double life, orphanhood, crime and new family structures (Table 10). In addition, the dominant themes in *El Señor de los Cielos 3* were revenge, family, crime, loyalty, organized crime, drug trafficking and police and government corruption.

Table 9. The ten most watched titles: format, length, time slot

	Title	Format	Genre	Number of chap./ ep. (in 2015)	First and last broadcast (in 2015)		Time slot
1	<i>Mi Corazón es Tuyo</i>	<i>Telenovela</i>	Fiction	64	06/30/2014	03/01/2015	Prime time
2	<i>Hasta el Fin del Mundo</i>	<i>Telenovela</i>	Fiction	98	07/28/2014	04/19/2015	Prime time
3	<i>La Malquerida</i>	<i>Telenovela</i>	Fiction	14	03/26/2014	01/16/2015	Prime time
4	<i>Que Te Perdona Dios, Yo No</i>	<i>Telenovela</i>	Fiction	123	02/16/2015	07/26/2015	Prime time
5	<i>El Señor de los Cielos 3</i>	<i>Telenovela</i>	Fiction	104	04/21/2015	09/21/2015	Prime time
6	<i>Lo Imperdonable</i>	<i>Telenovela</i>	Fiction	120	04/20/2015	10/04/2015	Prime time
7	<i>La Gata</i>	<i>Telenovela</i>	Fiction	34	05/05/2015	10/19/2015	Prime time
8	<i>Amores con Trampa</i>	<i>Telenovela</i>	Fiction	125	03/02/2015	08/23/2015	Prime time
9	<i>Yo no Creo en los Hombres</i>	<i>Telenovela</i>	Fiction	116	09/01/2014	02/15/2015	Prime time
10	<i>Pasión y Poder</i>	<i>Telenovela</i>	Fiction	36	10/05/2015	cont.	Prime time

Source: Obitel USA – Nielsen

Table 10. Themes in the ten most watched titles

Title		Dominant themes	Social themes
1	<i>Mi Corazón es Tuyo</i>	Love, deception, double life, orphanhood.	Crime, new family structures.
2	<i>Hasta el Fin del Mundo</i>	Love, betrayal, disloyalty, deception.	Social class differences.
3	<i>La Malquerida</i>	Family relationships, betrayal, infidelity.	Incest, bigamy, social class differences.
4	<i>Que Te Perdones Dios, Yo No</i>	Family, infidelity, betrayal.	Blindness, accident, pregnancy before marriage, ambition.
5	<i>El Señor de los Cielos 3</i>	Revenge, family, crime, loyalty.	Organized crime, drug trafficking, police and government corruption.
6	<i>Lo Imperdonable</i>	Deception, love, revenge, ambition.	Social class differences, suicide, family.
7	<i>La Gata</i>	Friendship, revenge, treason, love.	Orphanhood, social class differences, crime.
8	<i>Amores con Trampa</i>	Family, loyalty, love, infidelity, ambition.	Migration from a rural setting to an urban city.
9	<i>Yo no Creo en los Hombres</i>	Murder, family, sexual bullying.	Household responsibility, education.
10	<i>Pasión y Poder</i>	Rivalry, family, deception, love, infidelity.	Social class differences, corrupt business.

Source: Obitel USA – Nielsen

The audience profile analysis of the ten most watched titles in 2015 shows that women, with 65%, had a preference for *Mi Corazón es Tuyo* (Table 11a). Meanwhile, *El Señor de los Cielos 3* presented an equal gender viewership, with 52% female and 47% male. Regarding age group, 27% of *Mi Corazón es Tuyo*'s viewers were adults over 50 years old, followed by the age group comprising 25-34 years, with 25% (Table 11b). *El Señor de los Cielos 3* was preferred among viewers aged 35-49 years, with 32%, followed by 24% of the age group 25-34.

Table 11a. Audience profile of the ten most watched titles: gender

Titles		Channel	Gender %	
			Women	Men
1	<i>Mi Corazón es Tuyo</i>	Univision	65.2	34.8
2	<i>Hasta el Fin del Mundo</i>	Univision	63.1	36.9
3	<i>La Malquerida</i>	Univision	63.5	36.5
4	<i>Que Te Perdona Dios, Yo No</i>	Univision	65.9	34.1
5	<i>El Señor de los Cielos 3</i>	Telemundo	52.5	47.5
6	<i>Lo Imperdonable</i>	Univision	67.3	32.7
7	<i>La Gata</i>	Univision	64.0	36.0
8	<i>Amores con Trampa</i>	Univision	64.8	35.2
9	<i>Yo no Creo en los Hombres</i>	Univision	67.5	32.5
10	<i>Pasión y Poder</i>	Univision	65.4	34.6

Source: Obitel USA – Nielsen

Table 11b. Audience profile of the ten most watched titles: age

Title		Channel	Age group %					
			4-11	12-17	18-24	25-34	35-49	50+
1	<i>Mi Corazón es Tuyo</i>	Univision	16.1	7.7	7.9	16.3	24.9	27.0
2	<i>Hasta el Fin del Mundo</i>	Univision	14.5	5.8	6.1	15.7	26.6	31.2
3	<i>La Malquerida</i>	Univision	12.2	4.8	7.5	14.8	26.4	34.2
4	<i>Que Te Perdona Dios, Yo No</i>	Univision	12.3	5.0	6.0	15.3	25.8	35.6
5	<i>El Señor de los Cielos 3</i>	Telemundo	9.3	5.2	7.0	23.6	32.2	22.6
6	<i>Lo Imperdonable</i>	Univision	13.3	5.4	6.4	14.4	25.6	35.0
7	<i>La Gata</i>	Univision	13.5	6.1	7.3	14.8	25.1	33.2
8	<i>Amores con Trampa</i>	Univision	16.1	6.6	6.5	16.4	26.2	28.1
9	<i>Yo no Creo en los Hombres</i>	Univision	10.8	8.9	7.0	14.7	27.3	35.4
10	<i>Pasión y Poder</i>	Univision	12.9	5.9	6.0	14.9	27.3	33.0

Source: Obitel USA – Nielsen

3. Transmedia reception

In this section, the authors examine transmedia strategies implemented by the U.S. premiere fiction production that achieved the highest ratings in 2015 (Table 8). The production containing these traits is *El Señor de los Cielos*, in its third season. This television series was a co-production between the U.S. and Mexico, by Tel-

emundo and Argos Comunicación. *El Señor de los Cielos 3* disseminated their 104 episodes throughout six digital platforms: (1) Facebook, (2) Twitter, (3) hashtag, (4) applications, (5) YouTube and (6) website. Those digital content distribution venues disseminated episodes of the series in conjunction with traditional television programming, from Monday to Friday, during Telemundo prime time broadcast.

(1) On April 21, 2015, *El Señor de los Cielos* began its third season in Telemundo. That same day the television network launched via Facebook⁴ an application that allowed a more interactive relationship with audiences, who, through their mobile devices, could access exclusive content about the series not distributed by any other platform. It was a personalized video from the series’ main character, Aurelio Casillas, explaining his life in jail. After four months on air, this series reached four million fans. This Facebook page was visually interactive, because users had access to audiovisual material, could make comments about the episodes and could share those contents in their own personal social media accounts (Chart 2). Authors considered that Facebook is highly interactive, because users have diverse interactive elements at their disposal, such as comments, “likes” and sharing with their friends.

Chart 2. Transmedia analysis of *El Señor de los Cielos 3*

Fiction title	Network	Platform	Type of interaction	Level of interactivity
<i>El Señor de los Cielos 3</i>	Telemundo	Facebook	On-line interactive viewing	Active
		Twitter	Viewing	Active
		Hashtag	Interactive	Passive
		Apple app	Viewing	Passive
		Android app	Viewing Interaction	Active
		YouTube	On-line interactive viewing	Active
		Website	Viewing	Active

Source: Obitel USA

⁴ Available at <https://apps.facebook.com/SenordeCielos>.

(2) Through the Twitter account @ESDLC3⁵, the series released photographs of key scenes for each episode, along with a phrase describing those scenes. In addition, Twitter introduced new characters to audiences, and Telemundo, the network, linked each tweet to its corporate account as well as each actor's personal account to create a domino effect. Twitter presents a type of visual interaction because users can receive information and access the links shared within those messages, but they cannot respond to the messages (Chart 2). However, users can retweet those messages, sharing that information with their own personal followers. Twitter presents an active level of interactivity because the audience could react to those messages by sending them to their followers.

(3) The hashtag #ESDLC3 is an internet tool that audiences type into their favorite browser for a fast search on specific information, in this case for the latest news on *El Señor de los Cielos 3*. Also, audiences could write a comment and add the series hashtag to allow everybody on the internet to have access to that information. The series' main character had his own hashtag, as did the other leading characters. The type of interaction with the hashtag is interactive because audiences can search the most recent news or videos from the series (Chart 2). The hashtag allows a passive level of interaction since it is a distribution tool for finding information and it does not contain any interactive elements.

(4) *El Señor de los Cielos 3* has a total of three applications (apps), two for Apple⁶ and one for Android⁷. In 2014, the series had those same applications, but it released updated versions in 2015. Apple apps, known as Telemundo Novelas and Telemundo Now, allow users to watch episodes on their cell phones or tablets, but audiences cannot provide feedback, which is a distinguishing characteristic of the visual type of interaction, and the level of in-

⁵ *El Señor de los Cielos 3*, retrieved from <https://twitter.com/esdlc3>.

⁶ Apple store. App Telemundo novelas. Retrieved from <https://itunes.apple.com/us/app/telemundo-novelas/id430350805?mt=8>.

⁷ Google. App Telemundo novelas. Retrieved from <https://play.google.com/store/apps/details?id=com.glototelemundo&hl=en>.

teraction is passive (Chart 2). Regarding the Android app, it offers visual interaction because it allows users to access the audiovisual material and allows feedback from audiences. Consequently, it has an active level of interactivity.

(5) YouTube channel *El Señor de los Cielos 3*⁸ provides access to all 140 episodes of the third season and has 1,340,850 subscribers. Each episode has English subtitles to serve audiences who do not know Spanish. Users can provide feedback by writing a comment or responding to someone else's comment in a space provided under the video. Subscribers can also provide quick feedback by clicking on the thumbs up or down symbol located next to the video. YouTube has a transmedia interaction characterized as on-line interactive viewing, and the dominant level of interactivity is active (Chart 2).

(6) Telemundo network hosted the series website⁹, which has direct links to the previous two seasons of *El Señor de los Cielos*. In the tab that has the information about the third season, audiences can access all of the episodes, which are organized by television broadcast date. Each episode contains five segments, with one-minute commercial breaks between each of those segments. The audience can share episodes through their personal social media accounts as well as through personal e-mail. The website also has additional information about the series, organized in three segments that offer audiovisual material, such as promotional trailers about each episode, photo galleries featuring the leading characters showing behind-the-scenes action, and 15-minute weekly summaries showcasing the most significant scenes of the week. The website presents a viewing transmedia interaction type because audiences have access to audiovisual material, but feedback is not permitted, and the level of interactivity is active.

⁸ YouTube channel *El Señor de los Cielos 3*. Retrieved from https://www.youtube.com/watch?v=Ntk_E0HAMUk.

⁹ Telemundo (2015). *El Señor de los Cielos 3*. Retrieved from <http://www.telemundo.com/novelas/el-senor-de-los-cielos/capitulos/tercera-temporada>.

4. Highlights of the year

Univision and Televisa consolidated their relationship through a new programming agreement that expands to 2030. Similarly, there were changes in Univision investment structure, in which Televisa will take ordinary shares approximately equivalent to the 22% of the rights to vote. Fox International Channels, in turn, sold its 50% participation in the network to RCN Colombia, and was renamed MundoMax. Thus, MundoMax becomes the third network owned by a Latin American corporation, after Azteca, property of Mexican TV Azteca, and Univision, partially owned by Mexican Televisa.

Univision, whose audience share has systematically decreased for four years, decided not only to expand its enterprises through cable and internet, but also to diversify the business. After its entry to the English language television, with Fusion and El Rey, now it diversifies with investment on The Root, a portal targeting the African-American population, and The Onion, with millennials as the targeted population.

An important event was the fusion attempt between Comcast and TimeWarner, which would make free competition very difficult as well as the distribution of network signals that are not part of the corporations' portfolio. But the FCC stopped the process and the fusion was not made. In relation to failed corporate attempts, Univision worked in launching an "initial public offer" (IPO) to list its share on the exchange stock markets. However, Univision's disappointing financial landscape led to the cancellation of the proposal, with the idea to make the public offering in 2016.

Live events keep providing large rating numbers for the networks. For Univision, the event *Premios Lo Nuestro* alcanzó reached 8.9 million viewers, the *Annual Latin Grammy Awards* amounted to 8 million viewers, *Sábado Gigante Hasta Siempre*, 6.7 million and *Premios Juventud*, 3.4 million. The same happened with the reality shows involving talent competitions. In Univision, the finale of reality show *La Banda* reached 5.1 million viewers, and the finale

of *Nuestra Belleza Latina* reached 6.4 million viewers (Univision Corporate, 2015). In the case of Telemundo, the live events *Latin American Music Awards* reached 3.8 million viewers, *Premios Tu Mundo*, 2.4 million, *Telemundo Billboard Latin Music Awards*, 2.9 million. Also, *La Biblia*, which is a miniseries, reached 3.2 million viewers, and *La Voz Kids* finale, 2.2 million viewers (NBC-UMV, 2015).

5. Theme of the year: (re)invention of TV fiction genres and formats

The word genre, according to Steven Neale (2008:3), means type, as part of a classification system, established from a series of conventions, characteristic and norms. Glen Creeber (2008:1) argues that the utility of genres is that they allow to classify and give meaning to large quantities of content; genre is a categorization based on conventions that are subject to change. In particular, the concept of television genre is problematic, because since its inception the medium has been nurtured from formats and narrative conventions from other media, such as radio, film, literature, music, and other media and artistic forms (Neal, 2008:5). Thus, one of the elements that can distinguish among television genres is that they are hybrid categories, based on fluid conventions and constant change. The evolution of television genre is also the result of the way in which technological, economic, political, cultural and social transformations have impacted forms of production and the way professionals think, as well as the audiences' preferences and consumption dynamics. Following Jason Mittell (2004), the transformation of television genres is possible through the discursive universe in which producers, programmers, critics, scholars and different audiences talk about them.

The success of *El Señor de los Cielos*, in 2013, comes in a moment when the Hispanic television industry started losing audiences, particularly the millennial viewers, for the supply of cable, digital and mobile platforms, through which they access video on

demand (VoD) systems, such as Hulu, Netflix and Amazon. The bet with *El Señor de los Cielos*, argued Joshua Mintz in an interview, “was different since the beginning”. The *telenovela* was thought for only 74 episodes, with an unending plot arch, in order to leave “a series of elements without resolution” and to anchor the audience with known characters in order to follow their destiny in the next season (Littleton, 2013). The good results in ratings of *El Señor de los Cielos* at the 10 p.m. time slot and the great results on digital media and VoD motivated the network for a second season, starting an experiment that brought a lot of dividends. Even though Caracol TV was not a partner in the co-production in the second season, Telemundo and Argos carried the project out, exploiting the same multilocal and multinational narrative (Piñón, 2014). Mintz, in the interview given to *Variety* in 2013, recognized that, if *El Señor de los Cielos* reached a third season, that would mean a real “game changer” for the Hispanic industry (Littleton, 2013). Thus, with the second and the third season, *El Señor de los Cielos 1, 2, and 3* became the most watched *telenovela* of the network in 2013, 2014 and 2015. Together with these results, Telemundo started a campaign, as a programming strategy, in which declares *El Señor de los Cielos* is not a narconovela, but a Super Series. In spite of the mediocre result of *Dueños del Paraíso* (2015), a Telemundo-TVN co-production, with Kate del Castillo at prime time, the success of *Señora Acero* in 2014 provided the network with the elements and the reasoning to position them as Super Series.

What is a Super Series? In the words of Esperanza Garay, senior vice-president of sales and acquisitions for Latin America, the Super Series “are characterized as productions whose leading characters are stellar talents, with short formats, action to the limit and strong stories”. The executive argued that the deployment of a programming strategy of differentiation allowed the network to “focus on a different *telenovela*, with unique characteristics, shorter duration, from 60 to 80 episodes” (TV Latina, 2015). The positioning of a programming lineup at 10 p.m., as Super Series, allows

the network to resignify the meaning of its production. By calling them “series”, the network tries to take away the feminization that is linked to the concept of *telenovela* and to push for their masculinization, in which the series have acquired cultural status that television now enjoys, and which has been called by many as “the third golden era of television”.

In contrast to series, *El Señor de los Cielos* still preserves the traditional *telenovela* format, broadcast one hour daily, from Monday to Friday, with a continuing serial narrative, opposed to the series’ narrative, which is mostly conceived as “self-contained” within an episode.

However *El Señor* moves away from the traditional romantic plot, exploring characters’ relationships based on economic interest, power ambitions, desire and lust. The thematic is centered on criminal activities, traffic, money laundry and corruption, but, like the traditional *telenovela*, the family in *El Señor* provides an environment where the plot develops and where the relations matter. However, they are not conceived as a private intimate space, but as the scenario where the public space is shown through the position of the family and its members in relation to governmental entities, the military, drug cartels or guerillas.

Turner (2008) argues that discussions about television genre have been approached from three main perspectives: the academia, production and audiences. However, they have left aside a serious study on the role of programming executives. In that sense, it is important to consider the way we think about a television program regarding its position within the programming lineup, which, as part of a larger syntax, implies the kind of expectations about certain narrative styles, a kind of production, a targeted audience (age, gender), cultural status, possibilities of success, and can be read in relation to the program that precedes it and the one that follows it, or in relation to the other programs located at the same time in other competing television networks. *El Señor* is located at prime time, at 10 p.m., between the 9 p.m. *telenovela* and the 11 p.m. newscast.

Stronger themes shown in the 9 p.m. *telenovelas* open the door for the crude plot of *El Señor*, which is later linked to the reality of the news. The program is located within fiction and reality, literally. The third season of *El Señor*, in 2015, was preceded, in the same 10 p.m. schedule, by *Señora Acero*, *Dueños del Paraíso*, *El Señor de los Cielos 2* and *Señora Acero 2*. This programming sequence gave the network a supply logic, as the base of the rationale to argue that the 10 p.m. slot is for Super Series.

Telemundo has established an institutional and press effort in order to position these fictions as Super Series, known until lately as *narconovelas*. It is also a strategy to typify the productions as “series”, opening the opportunity for the free consumption of these programs by the young and male viewers, becoming an important factor for the jump of ratings in Telemundo programming. The network positions them as innovative, edgy, quality-oriented, with cinematic aesthetic and a plot typified by the action, in which characters are more rational and less emotional than in traditional *telenovelas*. They are related to a form of creation that is superior to regular *telenovelas*. The targeted audience is thought not only as young and male but also as more educated and informed. The rational behavior of the characters and the idea that the plot is based on the real life of Amado Carrillo give a touch of serious historical documentary.

Meanwhile, the consumption strategy through digital and interactive platforms established by *El Señor* underscores the network’s effort aimed at the transition into a VoD business model. Then so, the press reports that *El Señor* shows high ratings levels and that it has demonstrated to attract on-line and VoD audiences (Littleton, 2013). As we reported in our transmedia sections in this and last editions, Telemundo has produced a vast strategy of digital consumption of *El Señor* through multiple digital platforms, which includes a secret episode (online), the visit to the cell of *El Señor*, a digital comic, presence on Facebook, Twitter and YouTube, and much more material for consumption through the website, the network applications and Netflix. Thus, *El Señor de los Cielos* can be

a transition product that shows its level of success in two worlds: 1) the traditional broadcasting on TV and 2) the consumption through a second screen, on multiple digital and mobile platforms.

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11

URUGUAY: THE TURKISH INVASION. SCREEN AND AUDIENCE TRANSFORMATIONS¹

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1. Uruguay's audiovisual context in 2015

Year 2015 finds the Uruguayan television with a passed Law on Audiovisual Communication Services, but yet to be regulated and, as a result, without possibility of enforcement. Policies of economic support to the national production continue to apply: contests and verdicts occur, title lists are published, although very few of the TV fiction productions benefited from these public funds were broadcast. In the audiovisual panorama of the year, there is the convergence of the premiere of 11 national films in cinemas with protests and discussion on cinema and audiovisual support.

In this context, the supply of national television fiction in open television consisted of two productions of few chapters with educational bias, while a new format on internet television was explored. However, the most relevant phenomenon when it comes to fiction was the bursting of the Turkish *telenovela* and its invasive expansion on the screen, which generated several transformations that will be discussed in this chapter.

¹ This paper has been possible thanks to the contribution of Kantar Ibope Media Uruguay, which has provided substantial information to produce this report. We are indebted to Carolina Arigón and Valentina Cal for their time devoted and their collaboration.

1.1 Open television in Uruguay

The open television system in Uruguay maintains the same composition as stated in previous reports. The only novelty is that Tevé Ciudad joined as a new digital channel of open television. Nevertheless, access to its emissions is not fully extended as there is a percentage of the population that does not have adequate TV sets for this reception nor pay TV.²

Chart 1. National open television chains/channels in Uruguay

PRIVATE CHAINS/CHANNELS (3)	PUBLIC CHAINS/CHANNELS (1)
Montecarlo TV, Channel 4	Televisión Nacional Uruguay (TNU), Channel 5
Saeta TV, Channel 10	Tevé Ciudad (open digital TV)
Teledoce, Channel 12	
TOTAL CHANNELS = 4	

Source: Obitel Uruguay

1.2 Audience trends in 2015

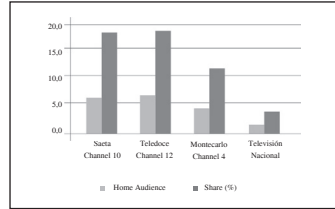
Graph 1 evidences some novelties that occurred in 2015: Teledoce, that had been leading the broadcast television audience during the past years, is struggling that position with Saeta and there is almost a draw. Both channels get 6.9 rating points and a minimum difference in the share puts Saeta in the first place with 20.0. The total volume of broadcast television audience remains scarce and stable with regard to the last two years (between 18% and 19%).

As it will be discussed below, the most important phenomenon in terms of audience trends is their adhesion to the Turkish *telenovelas*. It is Saeta that introduces them in Uruguay, but they were also adopted by Montecarlo. On the other hand, newscasts are still the programs that get higher audience.

² This channel will not be included in the following charts. We will refer only to TNU as public television because it was not possible to obtain programming data and audience measurement of Tevé Ciudad, information that we have for the other channels.

Graph 1. TV audience and share by broadcasting station (home rating)

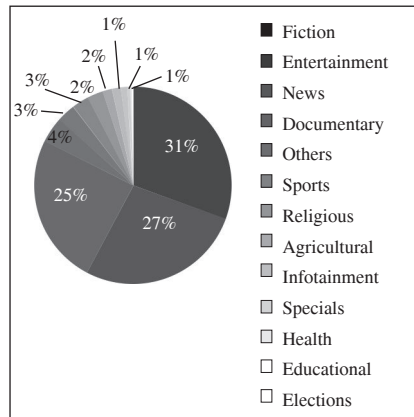
Broad-casting station	Home au-dience	%	Broad-casting station	Share
Saeta Channel 10	6.9	35.6	Saeta Channel 10	20.0
Teledoce Channel 12	6.9	35.6	Teledoce Channel 12	19.9
Montecarlo Channel 4	4.3	22.2	Montecarlo Channel 4	12.5
Televisión Nacional Channel 5	1.3	6.7	Televisión Nacional Channel 5	3.9
TOTAL	19.4	100		56.3



Source: Obitel Uruguay based on Kantar Ibope Media data

Graph 2. Genres and number of hours broadcast on TV programming³

Genres broadcast	Total hours broadcast	%
Fiction	9404:40	30.6
Entertainment	8359:45	27.2
News	7583:40	24.7
Documentary	1291:10	4.2
Others	921:35	3
Sports	875:25	2.9
Religious	726:10	2.4
Agricultural	515:50	1.7
Infotainment	437:30	1.4
Specials	341:40	1.1
Health	163:40	0.5
Educational	62:00	0.2
Elections	20:05	0.1
TOTAL	30703:10	100



Source: Obitel Uruguay based on Kantar Ibope Media data

³ Computed hours for each genre include time devoted to advertising.

The total offer of genres shows the same trends as in previous years: the largest amount of emitted broadcasting hours, 30.6%, is occupied by fiction of all kinds and origin, followed by 27.2% of entertainment and 24.7% of news.

The hours devoted to broadcast national programming accounted for 60.69% of a total of 30.703:10 hours. If its composition is analyzed, it shows that domestic production focused on news, which took 42.7% of the total hours devoted to domestic products. Entertainment was the other genre in which channels and producers focused their production, with 29.6%. Fiction, instead, occupied 1.9%, including the emission of fiction films.

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

Advertising investment in media had a decline in 2015, from US\$ 334 million in 2014 to US\$ 254 million in 2015. Between 2009 and 2014, growth was permanent and reached its peak in 2014, largely explained by the election campaign and public companies' advertising. However, during last year, there was a decline of 17% compared to 2014. This reduction can be explained by restriction policies in public enterprises, a shrinking private sector and a slow-down in consumption. A study⁴ carried out by the Economic Investigation Center (Cinve, in Spanish) for the Uruguayan Association of Advertising Agencies (Audap, in Spanish) shows that the 53% of advertising investment is concentrated on television, 13% on radio, 12% on press and 9% on the internet. Even though internet has grown as an investment destination, television remains the favorite.

While it is difficult to obtain precise data on advertising investment in fiction, according to data provided by Kantar Ibope Uruguay, 2,824,969 seconds were devoted for fiction. The top five advertisers in this genre in 2015 were: Genomma Laboratory, Unilever, Johnson, Teleshopping and El País.⁵

⁴ http://www.audap.com.uy/sitio/wp-content/uploads/2015/11/Resumen-Ejecutivo_CINVE-2015_.pdf.

⁵ Data from Monitor Evolution software provided by Kantar Ibope Uruguay.

1.4. Merchandising and social merchandising

In the two national productions broadcast in 2015, *Paleodetectives* and *Los Artistonautas*, some elements close to social merchandising are observed. In *Paleodetectives*, we can consider the role played in the narrative by the presence of the XO⁶ computer, as an encouragement to use it and as an emphasis on the function of that public policy aimed to children and their learning. Moreover, in *Los Artistonautas*, the encounter with an artist and his work, through a journey into the past, aims to stimulate the knowledge of national art and the approach to the National Museum of Visual Arts.

1.5. Communication policies

In the last days of 2014, the Law on Audiovisual Communication Services (LSCA, in Spanish) was passed in Parliament.⁷ Its regulation would be left to the new government that was installed in March 2015.⁸ The approval of the law triggered a series of constitutional challenges within the Judiciary: of the 202 articles of the law, 131 constitutional challenges were presented. Due to this situation, the new president, Tabaré Vázquez, decided to postpone the regulation of the LSCA until the Supreme Court of Justice (SCJ) would issue on these constitutional challenges. This decision determined that the law was not applied during 2015.

The SCJ ruled in April 2016, when finishing the writing of this chapter, the unconstitutionality of many articles of the law.⁹ The

⁶ The XO are computers given in the “One laptop per child” plans, which, following N. Negroponte’s initiative, were implemented in different Latin American countries. In the Uruguayan case, the program was called Plan Ceibal and the computer given to each child, Ceibalita.

⁷ The long process of this law and its debate have been presented in chapters of previous yearbooks. A more detailed description of the debate up to the beginning of 2015 can be found in: Sánchez Vilela, R. (2015). *Uruguay. A wishful law: between rules and production*. In *Obitel Yearbook 2015*.

⁸ The result of the national elections of 2014 defined the continuity of Frente Amplio in government, political party that rules with absolute majority since 2005, and Tabaré Vázquez assumed as president for his second term.

⁹ www.elpais.com.uy/informacion/declaran-inconstitucionales-articulos-ley-medios.html; www.enperspectiva.net/enperspectiva-net/entrevista-central-miercoles-13-de-abril-mar

aspects declared unconstitutional refer to: 1) the provisions limiting the growth of cable distributors (a lawsuit brought by Direct TV against article 55 of the law that limited its expansion to 25% of the total of TV households); the attribution of the Executive Branch to declare an event of general interest and thus force transmission; 3) the attribution to the Regulatory Unit of Communication Services (URSEC, in Spanish), an entity that depends on the Executive Branch, to conduct inspections with the power to suspend media; 4) content regulation proposed by article 60 of the law, which required that 30% of domestic production of television channels came from independent production houses and the obligation to broadcast at least two hours of national television fiction and in a specific schedule, between 7 p.m. and 11 p.m. While the Supreme Court keeps in force all content and advertising regulations relating to children, on the other hand it considers that the provisions outlined before violate freedom of communication; 5) finally, the SCJ found a violation of the principle of equality in the provisions related to the distribution of free advertising for political parties on electoral campaign in percentages according to the votes obtained in the previous election.¹⁰

The digital television development seems to have stopped. The analogue switch-off was scheduled for November 21st, 2015, but it did not happen. The judgment of the Tribunal de lo Contencioso Administrativo in favor of Cablevision's claim¹¹ ceases the decree issued during the administration of José Mujica, which regulated the allocation and development of digital terrestrial television. Given this, the new government suspended the "digital blackout" and issued a new decree, in which this idea is not used and, instead, refers

tin-risso/; <http://www.espectador.com/sociedad/332111/scj-acordo-contenido-del-primer-fallo-sobre-ley-de-medios>.

¹⁰ The Partido Independiente had impugned Article 143, which states that 20% of advertising will be distributed equally among all parties and 80% will be distributed in proportion to the votes obtained in the immediately preceding election.

¹¹ The judgment of the Tribunal de lo Contencioso was based on the fact that the government of former president Mujica had not given previous view to any of the decrees. <http://www.elobservador.com.uy/giro-y-vtv-tendran-seis-meses-mas-empezar-transmitir-aire-n670098>.

to the cease of analog broadcasts, but without setting a date for it. The conditions would not be given for a precise definition and the operators are free to decide about it. Among other factors, it should be considered that 40% of the population without cable television neither got appropriate decoders nor television sets.

With reference to Giro and VTV new signals, which had been granted in a public call in 2013 during José Mujica's government, after several extensions, they should have broadcast in October 2015, but could not make it. A new deadline was set, April 2016, for the new digital television channels allocated in the departmental capitals and 2017 for the rest of the country, but Giro and VTV have withdrawn their projects.¹² It is another chapter of a tortuous and uncertain story.¹³

In summary, during 2015, open television channels Saeta, Tele-doce, Montecarlo and TNU broadcast on digital television and were joined by Tevé Ciudad, a public channel that went from being a cable channel to open digital television.

Finally, to complete this picture, it is relevant to briefly point out the incentives for television fiction and two issues that were put on the agenda. One of the state agencies that provide support for audiovisual production is the Uruguayan Institute of Cinema and Audiovisual (Icau, in Spanish). In 2015, 147 projects – eight of television fiction and 13 of documentary – were presented to the Fund for Film and Audiovisual Development.¹⁴ Some of the television projects that won support in previous years are at different stages of realization, some are finished, but not broadcast yet.

Two other issues that had some presence on the public agenda were, on the one hand, the national cinema and, on the other hand,

¹² <http://www.elobservador.com.uy/sin-apagon-analogico-vtv-desiste-tv-digital-n670895>.

¹³ The regulatory process and allocation of digital television had ups and downs, as well as public bodies with intense presence in the media. We have dealt in detail with this story in the Obitel Yearbooks of the last two years, but a particularly detailed description can be found in: Sánchez Vilela, R. (2014). *Uruguay: stop-and-go national fiction*. In Obitel Yearbook 2014.

¹⁴ Created in 2008 by the Film Law.

the claim to the government, by national television companies, to take action in relation to Netflix. Regarding the first issue, the discussion revolved around public funds for national cinema. From the Film Law, since 2008, 25 million pesos were given to the national cinema, and the amount remains unchanged. By September 2015, there were demonstrations and protests in defense of national cinema claiming that funds intended as stimulus should be adjusted by the Consumer Price Index. With reference to Netflix, user growth since its installation in Uruguay in 2011 began to worry the National Association of Uruguayan Broadcasters (Andebu, in Spanish). In 2015, this organization calls on the government to impose taxes on Netflix.

1.6. Information and Communication Technology (ICT) trends

ICT penetration in the Uruguayan population continues to expand with some significant changes.¹⁵ We will focus on those changes that somehow could be linked to the circulation and consumption of television fiction.

In general terms, the downward trend in the percentage of households with personal computers continues and an upward is seen in the number of tablets, that in three years increased to 12%. Market expansion of mobile phones has been a constant in recent years and in 2015 reached 78% of the population over 12 years old. But the most important turning point consisted of the fact that 1,600,000 of them were smartphones in 2015, almost doubling the amount of last year. This figure acquires its real dimension in relation to the volume of Uruguayan population: equivalent to 50% of it. The connection gap has declined over the past three years from 30% to 62% and 72% of mobile phones have internet access. These data highlight the expansion of consumption possibilities of audiovisual products, including TV fiction, using devices that are not TV sets.

¹⁵ For this section the data was taken from *El Perfil del Internauta Uruguayo 2015*, a representative survey of the country population carried out by Radar Group. <http://gruporadar.com.uy>.

One of the most important aspects is the growth of internet users over 50 years old: 72% of people between 50 and 65 years old are connected to internet in 2015, while in the previous year this figure was 61%. Among people over 65 years old, the percentage that connects to the web also increased from 33% in 2014 to 44% in 2015. As noted in our previous report, these changes must be in consonance with the composition data of the TV fiction audience (open TV), mostly composed of women older than 60. This audience niche could be modified as a consequence of the entry of these age groups to the internet world.

Internet usage has not changed radically: the use of e-mail remains in decline, Facebook continues as the main social network, the usage of YouTube increases reaching 71%. Downloading films and series or watching them online remains as a frequent use and reading news websites grows from 63% in 2014 to 72% in 2015. The biggest news is the growth of WhatsApp: 1,300,000 Uruguayans over 12 years old use it. On the other hand, it has also increased the number of people who subscribe to Netflix: 210,000 watch films and TV shows in this way, hence the claim of domestic companies mentioned in the previous section.

The internet TV channels have evolved in Uruguay associated to traditional media and internet news websites since 2014: El Observador TV, El País TV, Portal 180, Canal M. However, this does not seem to have been a relevant opportunity for national fiction: the contents of this new television have been journalistic and with little innovation in genres and formats. One of the most important novelties of 2015 is the birth of a national on-line television channel, Pop TV¹⁶, with no links to any media already installed and with a programming profile different from the above mentioned channels.

¹⁶ This channel had been submitted to the call for the allocation of new digital signals and had presented its project at the public hearing in 2013. In that year, the then president, José Mujica, decided to grant two signals, one to Pop TV and the other to VTV. A few days later, Mujica changed the decision and gave the signal to consortium Giro. See the details of that process in: Sánchez Vilela, R. (2014). *Uruguay: stop-and-go national fiction*. In *Obitel Yearbook 2014*.

Pop TV was created as an internet channel television in April 2015. A trend that seems to dominate on-line channels when including fiction is the option for mockumentary (false documentary). This is seen in programming decisions of Pop TV that integrated Argentine programs on that line: *Tiempo libre*, *Eléctrica*, *Otra verdad* (which is a fictionalized interview). However, in the channel's own productions, fiction was not included.

1.7. Public TV

Public television experienced some changes. The first one was in the management of the two public channels, TNU and Tevé Ciudad. The old practice was repeated: management and much of the staff are displaced at every change of government, reinforcing the dependence on the political party in power or the change of majorities within the party. The second refers to the transformation of Tevé Ciudad from cable channel to digital open channel, but available only to those who own a suitable TV set for receiving digital broadcasting or cable users.¹⁷

TNU has maintained the trend in fiction programming observed in recent years: presented BBC fictions (in 2015, premiered *Luther* and a new season of *Downton Abbey*, for example) and included several Spanish fictions (as it had done with *Cuéntame* and *Amar en Tiempos Revueltos* or *Isabel*, but now added *Frágiles*, *Hispania* and *Los Misterios de Laura*). This channel promoted in 2015 a call for submissions of television projects. On the other hand, it was the channel in which were screened the two national productions this year and which is also listed as eligible for state support for its realizations.

¹⁷ We will refer only to TNU in different items of this chapter because, even though Tevé Ciudad has become broadcast television, we do not have data programming and audience measurement at our disposal, as we do have for other channels. Kantar Ibope Uruguay is not covering this channel in its current condition.

1.8. Pay TV

Pay TV reached 64% penetration in 2015, confirming the tendency in the growth rate. However, this has not meant increased opportunities for national fiction. The development of programming in national cable channels has focused on journalistic programs, in some cases with a cultural profile, but has not included fiction. The market for pay television continues with a similar distributional way to that of previous years and supply is presented with little diversification.

1.9. Independent production houses

Independent production houses more closely linked to television are Zur, Nepal, Oz Media, Contenidos TV, Oriental Features, Mueca, Coral Cine, Vitamina, Transparente, Aceituna, Antídoto, Los Informantes, Cuadro Films, Calamari Films, Estudio 9, De la Raíz, Muchacha, Ombú Media and Negro Jefe Films. The first five have a greater presence on the screen of national open television, in some cases with daily programs. TV fiction has not been a priority genre in their projects, unlike entertainment, infotainment and some documentary project. However, in recent years a few exceptions were reported: Contenidos TV produced *Adicciones*, released in 2011, and Oriental Features worked in the coproduction of *Historias de Diván*, created in 2012 and broadcast in 2013. The latter production house is focused on working for abroad: produced a documentary series on Pablo Escobar for the US channel Fusion and participated in the making of *El Hipnotizador*, aired on HBO. Antídoto Films and Los Informantes have developed projects with support from public funds, one of them is *Paleodetectives*, premiered in 2015. Other projects are in different stages and their release is announced for 2016.

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

The offer of television fiction consisted of 43 titles, 41 of which were premieres. This number represents a slight increase compared to 2014, when premieres were 37. However, a trend towards a decrease in the overall supply of Ibero-American fiction was recorded. As an example, 57 Ibero-American titles were broadcast in 2012, 47 of which were premieres, and in 2011 there were 46. This volume was reflected on a screen whose broadcast hours were largely supplied by these fictions: 3,211 hours in 2011 and 2,593 hours in the last year. In 2015, the result not only confirms a trend of decrease in the supply of Ibero-American titles and airtime but also evidences the impact of the inclusion of Turkish fiction, a phenomenon to be referred below.

Two reruns deserve special consideration: *Casados con Hijos* is a sitcom that one year and another is repeated as filler programming; on the contrary, *Lazos de Familia* is presented as the chance to see again a remembered Brazilian *telenovela*. In this case, the *telenovela* is broadcast with a special focus: a famous and traditional local actress and host, Cristina Morán, invites the audience to watch each episode while tea is served in her living room.

Table 1. Fiction broadcast in 2015 (national and foreign; premieres and reruns; and co-productions)

<p>PREMIERE NATIONAL TITLES – 2 TNU – 2 titles</p>	<p>Montecarlo</p>
<p>1. <i>Los Artistonautas</i> (series)</p>	<p>21. <i>Amores con Trampa</i> (<i>telenovela</i> – Mexico)</p>
<p>2. <i>Paleodetectives</i> (series)</p>	<p>22. <i>Camino al Amor</i> (<i>telenovela</i> – Argentina)</p>
<p>CO-PRODUCTIONS – 3</p>	<p>23. <i>Dulce Amor</i> (<i>telenovela</i> – Argentina)</p>
<p>Teledoce</p>	<p>24. <i>El Chiringuito de Pepe</i> (series – Spain)</p>
<p>3. <i>Violetta</i> (<i>telenovela</i> – Argentina/USA)</p>	<p>25. <i>El Color de la Pasión</i> (<i>telenovela</i> – Mexico)</p>
<p>Montecarlo</p>	<p>26. <i>Historia de un Clan</i> (miniseries – Argentina)</p>
<p>4. <i>5 Viudas</i> (<i>telenovela</i> – Colombia/USA)</p>	<p>27. <i>La Malquerida</i> (<i>telenovela</i> – Mexico)</p>
<p>5. <i>Entre Caníbales</i> (<i>telenovela</i> – Argentina/Uruguay/USA)</p>	<p>28. <i>La Ronca de Oro</i> (<i>telenovela</i> – Colombia)</p>
	<p>29. <i>La Sombra del Pasado</i> (<i>telenovela</i> –</p>

<p>PREMIERE FOREIGN TITLES – 36</p> <p>Teledoce</p> <p>6. <i>Dinosaurios y Robots</i> (telenovela – Brazil)</p> <p>7. <i>El Canto de la Sirena</i> (miniseries – Brazil)</p> <p>8. <i>Esperanza Mía</i> (telenovela – Argentina)</p> <p>9. <i>Flor del Caribe</i> (telenovela – Brazil)</p> <p>10. <i>Guapas</i> (series – Argentina)</p> <p>11. <i>Imperio</i> (telenovela – Brazil)</p> <p>12. <i>La Fiesta</i> (miniseries – Brazil)</p> <p>13. <i>La Gata</i> (telenovela – Mexico)</p> <p>14. <i>La Sombra de Helena</i> (telenovela – Brazil)</p> <p>15. <i>Lado a Lado</i> (telenovela – Brazil)</p> <p>16. <i>Las Brasileñas</i> (series – Brazil)</p> <p>17. <i>Las Cariocas</i> (series – Brazil)</p> <p>18. <i>Preciosa Perla</i> (telenovela – Brazil)</p> <p>19. <i>Que Te Perdona Dios, Yo No</i> (telenovela – Mexico)</p> <p>20. <i>Rastros de Mentiras</i> (telenovela – Brazil)</p>	<p>Mexico)</p> <p>30. <i>Lo que la Vida Me Robó</i> (telenovela – Mexico)</p> <p>31. <i>Pasión y Poder</i> (telenovela – Mexico)</p> <p>32. <i>Pulseras Rojas</i> (series – Spain)</p> <p>33. <i>Santa Diabla</i> (telenovela – USA Hispanic)</p> <p>34. <i>Viudas e Hijos del Rock'n Roll</i> (telenovela – Argentina)</p> <p>TNU</p> <p>35. <i>Amar en Tiempos Revueltos</i> (series – Spain)</p> <p>36. <i>Cuéntame</i> (series – Spain)</p> <p>37. <i>Frágiles</i> (series – Spain)</p> <p>38. <i>Hispania</i> (series – Spain)</p> <p>39. <i>Isabel</i> (series – Spain)</p> <p>40. <i>Los Archivos del Cardenal</i> (telenovela – Chile)</p> <p>41. <i>Los Misterios de Laura</i> (series – Uruguay)</p> <p>RERUNS – 2</p> <p>42. <i>Casados con Hijos</i> (Comedy – Argentina)</p> <p>43. <i>Lazos de Familia</i> (telenovela – Brazil)</p> <p>TOTAL PREMIERE TITLES: 41 TOTAL BROADCAST TITLES: 43</p>
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Source: Obitel Uruguay

Table 2. Premiere fiction in 2015: countries of origin

Country	Titles	%	Chapters/ episodes	%	Hours	%
NATIONAL (total)	2	4.9	29	1.2	10:55	0.4
OBITEL COUNTRIES (total)	39	95.1	2475	98.8	2582:15	99.6
NON OBITEL COUNTRIES (total)	0	0.0	0	0.0	0:00	0.0
Argentina	8	19.5	452	18.1	481:20	18.6
Brazil	11	26.8	565	22.6	538:40	20.8
Chile	1	2.4	24	1.0	22:00	0.8
Colombia	2	4.9	64	2.6	69:00	2.7
Ecuador	0	0.0	0	0.0	0:00	0.0

Spain	8	19.5	688	27.5	709:45	27.4
USA (Hispanic production)	1	2.4	97	3.9	110:05	4.2
Mexico	8	19.5	585	23.4	651:25	25.1
Peru	0	0.0	0	0.0	0:00	0.0
Portugal	0	0.0	0	0.0	0:00	0.0
Uruguay	2	4.9	29	1.2	10:55	0.4
Venezuela	0	0.0	0	0.0	0:00	0.0
TOTAL	41	100	2504	100	2593:10	100
National co-productions*	1	2.4	60	2.4	56:45	2.2
Ibero-American co-productions	3	7.3	77	3.1	70:15	2.7

* In the national co-production recorded here, Uruguay has a very small participation and is clearly an Argentinian co-production, so it is considered again in the Ibero-American co-production row.

Source: Obitel Uruguay based on Kantar Ibope Media data

The composition of the releases in 2015 presents some new features compared to previous years: Brazilian titles constituted this time the majority (11 titles) and the number of Spanish fictions (eight titles) increased, equal in number to those from Argentina and Mexico, traditional providers of Uruguayan television.

Domestic production reappears this year, but with a particular format: it refers to educational fiction aimed at children: *Paleodetectives* and *Los Artistonautas*. Although the number of broadcasting hours is not very large, both productions stand out because they have received state funds or were the result of the association of different institutions (the public channel TNU and the National Museum of Visual Arts, for instance). In both cases, the productions were broadcast in public television.

Table 3. Co-productions

Co-productions	Titles	Co-producer countries	Production houses
Uruguay + Obitel countries	<i>Entre Canibales</i>	Argentina	Telefe – 100 Bares
		Uruguay	Montecarlo TV
		United States	Fox International Latam
TOTAL TITLES CO-PRODUCED WITH OBITEL COUNTRIES: 1			
Other Obitel countries + non Obitel Countries	<i>Violetta</i>	Argentina	Pol-ka
		United States	Disney Channel Latinamerica
	<i>5 Viudas</i>	Colombia	Caracol TV
		United States	Sony
TOTAL TITLES CO-PRODUCED BY OTHER OBITEL COUNTRIES + NON OBITEL COUNTRIES: 2			
TOTAL CO-PRODUCTIONS: 3			

Source: Obitel Uruguay based on Kantar Ibope Media data

With reference to the three co-productions showed on Table 3, it is interesting to point out the role of Montecarlo in the *telenovela Entre Canibales*. In the diffusion previous to its premiere all press releases underlined the engagement of this channel as co-producer, along with Telefe, 100 Bares and Fox. However, it has not been possible to ascertain what has been its specific role and, apart from being the channel that broadcast the title and the participation of the Uruguayan actress Natalia Oreiro, there is no evidence in the product of any other national component.

Table 4. Chapters/episodes and hours broadcast per time slot

Time slot	National				Ibero-American				Total			
	C/E	%	H	%	C/E	%	H	%	C/E	%	H	%
Morning (06:00-12:00)	0	0.0	0:00	0.0	0	0.0	0:00	0.0	0	0.0	0:00	0.0
Afternoon (12:00-19:00)	20	69.0	10:05	92.8	1167	47.2	1239:05	48.0	1187	47.4	1249:10	48.2
Prime time (19:00-22:00)	9	31.0	0:50	7.2	810	32.7	837:00	32.4	819	32.7	837:50	32.3
Night (22:00-06:00)	0	0.0	0:00	0.0	498	20.1	506:10	19.6	498	19.9	506:15	19.5
Total	29	100	10:55	100	2475	100	2582:15	100	2504	100	2593:10	100

Source: Obitel Uruguay based on Kantar Ibope Media data

Table 5. Formats of national and Ibero-American fiction

Format	National				Ibero-American							
	Titles	%	C/E	%	H	%	Titles	%	C/E	%	H	%
<i>Telenovela</i>	0	0.0	0	0.0	0:00	0.0	24	61.5	1644	66.4	1716:50	0.7
Series	2	100	29	100	10:55	100	12	30.8	800	32.3	834:00	0.3
Miniseries	0	0.0	0	0.0	0:00	0.0	3	7.7	31	1.3	31:25	0.0
Telefilm	0	0.0	0	0.0	0:00	0.0	0	0.0	0	0.0	0:00	0.0
<i>Unitario</i>	0	0.0	0	0.0	0:00	0.0	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.)	0	0.0	0	0.0	0:00	0.0	0	0.0	0	0.0	0:00	0.0
Total	2	100	29	100	10:55	100	39	100	2475	100	2582:15	1.0

Source: Obitel Uruguay based on Kantar Ibope Media data

Table 6. Formats of national fiction per time slot

Format	Morn- ing	%	After- noon	%	Prime time	%	Night	%	To- tal	%
<i>Telenovela</i>	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Series	0	0.0	1	0.0	1	100	0	0.0	2	100
Miniseries	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Telefilm	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
<i>Unitario</i>	0	0.0	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	0	0.0
Others (soap opera, etc.)	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Total	0	0.0	1	0.0	1	100	0	0.0	2	100

Source: Obitel Uruguay based on Kantar Ibope Media data

In Ibero-American fiction, trends regarding schedules and formats persist: most hours devoted to premiere (48%) is allocated in the afternoon; the *telenovela* remains the favorite format, with 24 titles, but is also recorded the growth of series (12 titles) and to a lesser extent the presence of miniseries. Most television fiction in the evening and in less extent in prime time can be explained not only by the programming needs of that time slot but also for the long duration of the newscasts, which are located in prime time and have a duration exceeding one hour and a half.

Table 7. Time period in which fiction is set

Time	Titles	%
Present	31	75.6
Period	5	12.2
Historical	5	12.2
Other		0,0
Total	41	100

Source: Obitel Uruguay

The stories of these fictions are predominantly in the present time (31 titles out of 41), but this year there has been an increase in narratives with period setting or historical recreation, such as *Lado a Lado*, in the first case, or *La Ronca de Oro*, in the second.

Table 8. The ten most watched titles: origin, rating, share

Title		Country of original idea or script	Production house (country)	Channel	Scriptwriter or author of original idea	Rating	Share
1	<i>Rastros de Mentiras</i>	Brazil	Globo (Brazil)	Teledoce	Walcyr Carrasco	20.2	32.2
2	<i>El Canto de la Sirena</i>	Brazil	Globo (Brazil)	Teledoce	George Moura, Patrício de Andrade	16	26.9
3	<i>Esperanza Mía</i>	Argentina	Pol-ka (Argentina)	Teledoce	Adrián Suar, Matilde Betoldi (scriptwriter)	15.6	22.8
4	<i>Imperio</i>	Brazil	Globo (Brazil)	Teledoce	Aguinaldo Silva	14.8	22.7
5	<i>La Fiesta</i>	Brazil	Globo (Brazil)	Teledoce	Inspired by Braulio Nuno de Almeida's <i>telenovela</i> . Adaptation: George Moura and Sérgio Goldenberg	12.4	18.4
6	<i>Flor del Caribe</i>	Brazil	Globo (Brazil)	Teledoce	Walther Negrão	11.5	22.9
7	<i>Dinosaurios y Robots</i>	Brazil	Globo (Brazil)	Teledoce	Walcyr Carrasco	11.3	18.3
8	<i>Las Cariocas</i>	Brazil	Globo – Lereby (Brazil)	Teledoce	Euclides Marinho, Adriana Falcão, Clarice Falcão, Claudia Tajés, Gregório Duvivier, Marcelo Saback	10.5	17.4
9	<i>Las Brasileñas</i>	Brazil	Globo – Lereby (Brazil)	Teledoce	Jó Abdu, Márcio Alemão, Marcos Bernstein, Carolina Castro, Gregório Duvivier, Adriana Falcão, Clarice Falcão et al.	9.9	17.5
10	<i>Guapas</i>	Argentina	Pol-ka (Argentina)	Teledoce	Adrián Suar, Calderone-Aguirre (script)	9.7	22.7
Total productions: 10				Foreign scripts: 10			
100%				100%			

Source: Obitel Uruguay based on Kantar Ibope Media data

The integration of the ten most watched premieres repeats some of the titles of 2014: *Rastros de Mentiras*, which is again in first place, *Flor del Caribe* and *Guapas*. The novelty in 2015 is that among the new titles there is a greater presence of miniseries: *El Canto de la Sirena* and *La Fiesta*.

When observing this year's top ten table, it is possible to arrive at two conclusions: the predominance of Brazilian fiction and the absolute hegemony of Teledoce as broadcaster of the ten most watched titles. While Brazilian fictions have occupied the top places in recent years, Argentina disputed the composition of the table in a more balanced way. In the last three years at least four titles came from Argentina and some of its fictions ranked in the first or second place. In 2015, however, only two Argentine fictions made up the top ten, *Esperanza Mía* and *Guapas*. The dominant trend of Teledoce was also observed in past yearbooks, but it was tinged with the presence of other channels, even though with a single title. Such was the case, for example, of the years 2012 and 2013 in which Montecarlo could place one of its titles in the top ten. Thus, 2015 is the second consecutive year of the absolute dominance of Teledoce in the top ten.

However, it is necessary to put in context this success taking into account what has been identified as the newest phenomenon of the year: the emergence of Turkish *telenovela*. The three *telenovelas* that Saeta broadcast led the rating in 2015:

Turkish telenovelas	Rating	Share
<i>¿Qué Culpa Tiene Fatmagül?</i>	22.0	32.2
<i>Las Mill y Una Noches</i>	20.1	32.9
<i>Sila</i>	19.6	32.2

Source: Obitel Uruguay based on Kantar Ibope Media data

As evidence of the sole comparison with the top ten table of Ibero-American fictions, audience data of Turkish fictions exceed or equal those titles in the top spots. Also *Ezel*, premiered by Montecarlo, had good results, with 12 rating points. This phenomenon is

the highlight of the year because it transforms screen television in its aesthetics, its theme and its relationship with the audience, as it will be discussed in section 4.

Table 9. The ten most watched titles: format, length, time slot

	Title	Format	Genre	Number of chap./ep. (in 2015)	First and last transmission (in 2015)	Time slot
1	<i>Rastros de Mentiras</i>	Telenovela	Melodrama	90	01/05-06/15	Prime time
2	<i>El Canto de la Sirena</i>	Miniseries	Drama Detective	4	01/13-01/22	Night
3	<i>Esperanza Mía</i>	Telenovela	Comedy Romance	101	08/10-12/31	Prime time
4	<i>Imperio</i>	Telenovela	Melodrama	95	07/13-12/30	Night
5	<i>La Fiesta</i>	Miniseries	Romance Detective	16	06/08-07/09	Prime time
6	<i>Flor del Caribe</i>	Telenovela	Romance	17	01/01-01/23	Prime time
7	<i>Dinosaurios y Robots</i>	Telenovela	Romance Comedy	85	08/17-12/11	Prime time
8	<i>Las Cariocas</i>	Series	Comedy	8	01/27-02/24	Night
9	<i>Las Brasileñas</i>	Series	Comedy	16	02/26-04/23	Night
10	<i>Guapas</i>	Series	Comedy Romance	76	01/05-05/08	Night

Source: Obitel Uruguay based on Kantar Ibope Media data

Table 10. Themes in the ten most watched titles

	Title	Dominant themes	Social themes
1	<i>Rastros de Mentiras</i>	Ambition, revenge, secret in the family and affective relationships.	Homosexuality and paternity, solidarity belly, adoption, autism and inclusion, cancer, love in the elderly.
2	<i>El Canto de la Sirena</i>	Secret, murder, art and fame, loyalty and disloyalty in friendship.	Power relationships and religion.
3	<i>Esperanza Mía</i>	Love, celibacy, religious vocation, bastardy and disclosure of identity.	Mother abandonment and rebuilding of ties.
4	<i>Imperio</i>	Power relationships, bastardy, ambition and revenge.	Homosexuality, homophobia, gender identities, adoption.
5	<i>La Fiesta</i>	Power, ambition, crime, frivolity.	Business world, corruption.

6	<i>Flor del Caribe</i>	Love triangle, ambition and revenge, criminal network.	Labor exploitation, aftermath of the Nazi persecution of Jews, adoption.
7	<i>Dinosaurios y Robots</i>	Love triangle, ambition, crime.	Use of new technologies and robotics, corruption.
8	<i>Las Cariocas</i>	Passion, betrayal, the place as protagonist.	Femininities, beauty stereotypes.
9	<i>Las Brasileñas</i>	Love, jealousy, diffusion of specific geographic spaces.	Femininities.
10	<i>Guapas</i>	Friendship, affective relationships, love triangle.	Anger and its treatment, alcoholism, domestic violence.

Source: Obitel Uruguay

Table 11. 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	<i>Rastros de Mentiras</i>	Teledoce	67.0	33.0	12.9	20.2	16.8	16.7	33.6
2	<i>El Canto de la Sirena</i>	Teledoce	73.0	27.0	9.7	15.8	16.1	15.8	42.6
3	<i>Esperanza Mía</i>	Teledoce	67.0	33.0	14.9	19.5	21.9	15.0	28.7
4	<i>Imperio</i>	Teledoce	68.0	32.0	16.2	20.9	18.9	13.8	30.2
5	<i>La Fiesta</i>	Teledoce	65.0	35.0	16.5	21.7	16.7	14.7	30.5
6	<i>Flor del Caribe</i>	Teledoce	70.0	30.0	11.8	19.3	16.4	16.9	35.6
7	<i>Dinosaurios y Robots</i>	Teledoce	66.0	34.0	11.8	24.4	26.0	8.4	29.4
8	<i>Las Cariocas</i>	Teledoce	69.0	31.0	10.3	18.9	12.9	12.3	45.7
9	<i>Las Brasileñas</i>	Teledoce	65.0	35.0	11.0	22.3	13.1	14.3	39.3
10	<i>Guapas</i>	Teledoce	68.0	32.0	11.1	21.3	15.1	17.0	35.5

Source: Obitel Uruguay based on Kantar Ibope Media data

	Title	Channel	Age group %						
			4 to 11	12 to 17	18 to 24	25 to 34	35 to 49	50 to 59	60 and more
1	<i>Rastros de Mentiras</i>	Teledoce	3.2	3.0	4.3	10.6	18.6	18.1	42.1
2	<i>El Canto de la Sirena</i>	Teledoce	3.8	4.9	3.5	14.8	23.8	17.0	32.2
3	<i>Esperanza Mía</i>	Teledoce	8.8	8.2	7.4	17.1	20.1	14.7	23.6
4	<i>Imperio</i>	Teledoce	6.4	6.0	6.8	16.8	19.2	14.3	30.5
5	<i>La Fiesta</i>	Teledoce	2.8	2.4	6.2	11.8	17.9	23.5	35.3

6	<i>Flor del Caribe</i>	Teledoce	2.7	4.0	3.3	7.1	16.9	7.2	58.9
7	<i>Dinosaurios y Robots</i>	Teledoce	7.3	5.5	3.8	13.0	16.7	15.1	38.6
8	<i>Las Cariocas</i>	Teledoce	2.8	8.2	6.9	16.0	24.5	15.9	25.7
9	<i>Las Brasileñas</i>	Teledoce	4.8	5.0	7.1	13.0	23.5	22.1	24.5
10	<i>Guapas</i>	Teledoce	4.5	6.0	10.2	14.4	26.9	15.9	22.2

Source: Obitel Uruguay based on Kantar Ibope Media data

The top ten audience's profile, in general terms, repeats the characterization of previous years, perhaps highlighting some aspects: targeting women, low income sectors and adults over 60 years old. Thus, an increase is observed in the feminization of the public: between 65% and 73% of the viewership of the ten most watched titles are women. Men have their largest presence in two of the titles, *La Fiesta* and *Las Brasileñas*, which are broadcast at night. Regarding socioeconomic level, the audience highest percentage of these titles focused on levels B+ and B-, in a value ranging from 28.7% to 45.7%. M+ level has slightly higher audience percentages than M and M-. The title *Dinosaurios y Robots* is the one in which the M+ segment has greater weight in the audience composition, with 24.4%. The A sectors constitute a smaller portion of the public and has its biggest presence in *Imperio* and *La Fiesta*.

The aging of the audience is another constant that the analysis of the ten most watched fictions has been revealing: the highest percentage of the audience is people over 60 years old. The age segment that follows in importance corresponds to the range 35-49 years.

3. Transmedia reception

To study this topic in 2015, we have chosen the case of Turkish *telenovela* *Las Mil y Una Noches*, basically for two reasons. One of them is that this is the first Turkish *telenovela* aired in Uruguay by Saeta, which in previous years was the main producer of national fictions. Unlikely what happened with their latest productions, *Historias de Diván* and *Somos*, in which there were only access to the

chapters, *Las Mil y Una Noches* displays various transmedia strategies aimed primarily at the constant involvement of the public and not only through the viewing. This action had never been adopted before for either own or imported productions.¹⁸ The second reason for the choice concerns the type of participation and involvement of the public, which differs a lot from the one observed in various fictions since the study of the transmedia reception was included in Obitel.

For the case analysis, firstly, we proceeded to study the transmedia strategies of the transmitter from the channel's website and the official Facebook account. Secondly, we analyzed the audience participation in spaces designed by the transmitter, but also on a Facebook group created by a fan.

The transmitter articulates various transmedia strategies: strong presence in Saeta's home page, a specific space on its website devoted to this fiction and convergence with Twitter and Facebook. The channel's website promotes chapters and makes them available as soon as they are aired. Viewing is offered, but audience participation moves to Facebook and Twitter, profiles that are administered by the channel. The official Facebook page works as a complement to the channel's website. There it is possible to perform real-time interaction with comments and responses to the publications of the transmitter, but not the viewing of the chapters.

The transmedia strategy in the official Facebook page consisted on playful publications, slogans as questions addressed to the us-



¹⁸ It must be remembered that the most widely transmedia display in broadcast television was carried out by this channel with *Dance! La Fuerza del Corazón*, but with less intensity.

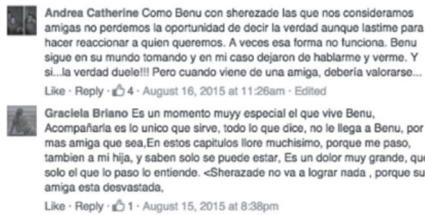
ers, promotion of the next chapter and images with some suspense phrase that invited to participation. The contents were diverse: from video greetings from the actors to the Uruguayan audience to the publication of poems or passages of the book that names this fiction. At the end of the broadcast, the channel made an edition of the literary work *Las Mil y Una Noches*, which was drawn among the audience. The audience could participate in the draw through social networks. These were the most commented posts: 775 shares, 834 likes and 151 comments. The draw was also used as a strategy to “hook” the audience with the new Turkish *telenovelas* that were to be broadcast.

In order to analyze the transmedia reception, it was observed the audience activity in the Facebook page created by Saeta, since the beginning of the broadcast, and also a Facebook group created by a fan aimed exclusively at women. The Facebook created by the channel had 23,631 fans. One of the key instances of the activity was the organization by the channel of an *avant-première* in a cinema. The event was promoted on the Facebook page and tickets, which were free, were sold out. The day after this event, an album with photos and a link to the live interviews made by the news-cast’s channel was posted. The audience also responded to contents such as a photo album of the characters whose title was the question: “What is your favorite character?”. The post had 732 likes, 72 shares and 136 comments.

The comments from participants contain general assessments of the *telenovela* or a specific post, answer the questions posed by the channel or include claims for programming decisions, the suspension of the broadcast of a chapter or the duration of the advertising slot. The most interesting features seen in the



transmedia reception are in the type of relationship developed among the participants and the content of comments. In the first aspect dialogue is observed between the audience, friendship requests, a cooperative spirit with recommendations for websites where to watch the *telenovela* and anger against spoiler participants. In the second aspect, commitment to this fiction is made evident in the analysis of the character's situations, in the identification experience and in connection with circumstances of reality and personal history. As an example, Benu's alcoholism generated comments as those reproduced here.



This aspect is especially evident in the Facebook group created by a fan¹⁹ to share comments and opinions of the *telenovela*. From the very beginning, it is aimed at a female audience and expresses that the group will only refer to chapters broadcast by Saeta. The publications are more personal and there are initiatives such as one of a member that invites to create a *telenovela*'s WhatsApp group. The proposed link is that of a feeling of “passion” for this fiction. With this central nexus, the idea of community and cooperative activities are expressed here more clearly than in the official Facebook page. The most noticeable aspect in the transmedia reception of this case is the degree of emotional commitment and the collective nature of the experience. The community of viewers is constituted in real time regarding the broadcast of the *telenovela* and posts. Contents and opinions about



¹⁹ <https://www.facebook.com/groups/793979130695931/>. The group was created on March 14th, 2015 and has 130 members.

Saeta scheduled the Turkish *telenovelas* occupying almost all the prime time. With a history of producing fiction between 2009 and 2013, the channel put on hold this activity and turned into the production of entertainment in 2014. To this change of strategy, the channel added the import of Turkish fictions in 2015.

The landing of the Turkish *telenovela* in Uruguay had as the flagship *Las Mil y Una Noches*. Saeta premiered it on January 18th, 2015 and played the same strategy product installation that was applied in Chile by Mega. Since the arrival of *Las Mil y Una Noches*, there was a kind of Turkish invasion of the screen: not only for the number of titles²² but also for their presence in broadcasting hours. The three titles broadcasted by Saeta, as already noted, had very good results in rating and share. Along with this audience phenomenon, demonstrations of anger were recorded by the Armenian community in Uruguay, which saw the premiere of the *telenovela* as a Turkish attempt to temper the commemoration of the centenary of the Armenian genocide remembered that year.

The Turkish phenomenon that the Chilean Obitel team mentioned in 2014 settles in Uruguay in 2015 and promotes discussions and questions. Why does the audience choose them? Why are stories so full of conventions and traditional values accepted? How is a fiction of 2006, released nearly ten years later in Uruguay, imposed? How is a title that emphasizes guilt and loss of honor, as in the case of *¿Qué Culpa Tiene Fatmagül?* or *Sila*, accepted?

Taking into account the history of the relationship between the national audience and the *telenovela*, some explanations can be attempted. First, the Turkish *telenovela* that bursts in Uruguay with *Las Mil y Una Noches* has the elements of the traditional *telenovela* in an exotic location. This results in a distance that makes this version of the melodrama admissible: it is because it belongs to a re-

²² Besides the title mentioned above, *¿Qué Culpa Tiene Fatmagül?*, *Sila*, *Secretos*, *Ezel* and *Amor en Guerra* are also broadcast, totaling six titles, four aired by Channel 10 and two by Montecarlo. In this last case, to the Turkish titles, Montecarlo added a Romanian one: *El Nombre del Honor*.

mote and strange world where something that would be unacceptable, that would produce rejection and boredom in a fiction from another origin, is accepted as likely. The slow action in each scene, the silence, the loving and demure glances, the voice-over of the characters or a narrator who sets out reflections or philosophical statements, like in *Ezel* or *Las Mil y Una Noches*, are accepted traits since they are perceived as examples of the idiosyncrasy of a foreign culture.

On the second hand, the recognition of a known and predictable narrative matrix places these *telenovelas* in line with gender homogeneity, which provides a framework for understanding the strange. It is a “decaffeinated” or “pasteurized” version of the difference, passed through a sieve that makes it tolerable: diluted certainly, but different at last. For local audience, exoticism remains an important value: to see the other is one of the attractions for foreign *telenovelas* consumption. It is clear that landscapes are part of a kind of touristic exoticism that produces attraction, but more deeply, on the Turkish *telenovela*, the exotic is perceived in family relationships, gender and generations, particularly those linked to the place of woman, the authority, the tradition and honor, as in the case of *Sila*. These topics and conflicts acquire a stranger character when developed in distant geographical spaces and characters with costumes different to ours. However, it must be noted that most of these topics are deeply Western and with long presence in Latin America through the Spanish culture and its literature, which revolves around honor and dishonor revenge.

The “Turkish invasion” had a significant effect on the distribution of audience between channels and specifically in the public of the fiction. As stated before, the leadership of rating and share, that in previous years was Teledoce’s, begins to be questioned due to the results of Saeta in 2015. In addition, another significant feature of the phenomenon is observed. If we compare the audience profile of the top ten, surveyed in Table 11, with the one of Turkish *telenovelas* premiered in 2015, it is striking that there is a noticeably increase

of the male audience: between 65% and 74% are men, while in the ten most watched Ibero-American fiction male participation reaches at most 35%, and only in *La Fiesta*.

5. Theme of the year: (re)invention of TV fiction genres and formats

Uruguay joined Obitel in 2008 and, since then, 13 national television fiction titles were released in open television, all concentrated between 2009 and 2013. In those five years, the dominant formats were series, miniseries and unitary, but productive efforts focused on the pursuit of serialization in two ways: on the one hand, in the configuration of an industrial production and, on the other hand, in the development of frames with narrative continuity, in which the characters not only reappear in every episode, but also change and evolve. In a parallel process, there were testing strategies to achieve a sustainable production model: the association with foreign resources in different areas (in production, script or action) and alliances for product placement in international markets. In these searches, the most relevant actor has been Saeta, which generated seven of those titles, including the first daily teen series²³ produced in the country.

Humor, in varying degrees and forms, is a constant in this teledramaturgy: from the presence of well-known comedians as in *Porque te Quiero Así* (Jorge Esmoris, Gustav, Florencia Peña, Graciela Rodríguez) to the production of the first Uruguayan sitcom, *Bienes Gananciales*, through sporadic inclusion of funny situations in the stories, as in *Las Novias de Travolta*. However, diversification of themes and formats has been a feature of the production of these years and, far away from humor, some of the most important fictions of the period are *Adicciones*, *Somos* and *Historias de Diván*.

Despite these efforts that seemed to show the existence of a certain production capacity, in the last two years the production of

²³ *Dance! La fuerza del corazón*.

national fiction, at least in the classical formats, was absent from the offer of open television. The national television fiction seems unable to survive on its own and then is combined with other genres: sometimes is part of educational contents and in others take the form of mockumentary in webseries. We will analyze these new forms of fiction in domestic production in which changes can be seen in the genre, the search of different formats and production models. We will also study the most innovative manifestations, whose setting has not been open television, but the internet. Beyond specific differences, it is possible to find some kind of relationship with the documentary in all of them.

Fictional and educational

Paleodetectives and *Los Artistonautas* are two productions aimed at children, released in July 2015 by the public channel TNU. In both titles, fiction is the framework of educational content, but the fictional expansion is different in each case.

In *Paleodetectives*²⁴, the documentary record – instrument traditionally used for the dissemination of scientific knowledge – is combined with the configuration of a fictional world closed on itself, it does not need external validation nor accordance with reality. The fictional universe is constituted of a system of characters: a group of children form the World Organization of Curious Children, which in every episode proposes a mystery to solve referred to prehistoric animals that inhabited the country. Three other characters – the biologist, the paleontologist and the biochemist physicist – are responsible for elucidating the enigma and will conduct the investigation as if they were detectives that must solve a case. In the process, they move magically from their lair to the present stage

²⁴ Directed by Leo Lagos, who is also involved in the script together with Ernesto Blanco, Andrés Rinderknecht and Washington Jones, which are the three who play as detectives. In real life, they are researchers at the Faculty of Science of Udelar. Florencia Donagaray (Los Informantes) is the executive producer. The project has benefited from the Film and Audiovisual Fund Promotion of Icau 2013, with the support of Anii TNU, Faculty of Science and Socio Spectacular. <https://www.youtube.com/watch?v=C7PJVMaX1fg>.

where prehistoric traces can be found and are the key to the puzzle. They formulate hypotheses and discover new clues to finally answer the question posed by the Organization. When explaining the case resolution, they use a short animated fictionalization. Each episode has a detective narrative, with moments of tension and resolution. In this global narrative outline, there is a documentary discourse, which contains the knowledge that aims to be disseminated: for example, the paleontologist shows traces of a class of dinosaur in rural territory and, on the field, explains the characteristics of the animal and how to identify what kind of dinosaur it is; other times, they ask another scientist (outside the team of characters) to provide information on any aspect, and then the interview is adopted.

In addition to the disclosure content, which shows the educational intention, the narrative purpose is highlighted by including in several scenes the XO computer: the children pose the enigma through it and the answer is also formulated by that via. In this way, the program is linked to the Ceibal Plan and with other educational developments through Domo Portal, with interactive spaces, more information on the subject, etc.

*Los Artistonautas*²⁵ is a lively fiction in which two children that are friends, Felipe and Sabrina, meet every afternoon to play at home. In each episode comes up the curiosity to know about an artist of the Uruguayan art history. The children then board a cardboard ship manufactured by themselves that allows to travel through time to meet the artist, who will answer their questions and explain how his painting is, based on a specific work. Once the questions are answered, the children go back to the ship to return home while the voice-over invites to learn more about the artist by visiting the National Museum of Visual Arts. In this case, unlike *Paleodetectives*,

²⁵ Directed by Juan Carve and produced by Televisión Nacional del Uruguay (TNU) with support from the National Museum of Visual Arts. The realization of the series was in charge of Juan Carve (director and co-writer), Valentina Echeverría (art director and co-writer), María Eugenia Grau (coordinator of the Educational Area of the Museum) and Andrés D'Avenia (TNU producer).

there is no documentary discourse, and all the information and historical references are in the fictionalization of the fantastic encounter. So, in one episode, children know about Joaquín Torres García, Pedro Figari or Rafael Barradas, represented in animated characters that explain some of their paintings.

The definition of genre of audiovisual products in general, and of television in particular, has always been a complex issue. One of the points of controversy is to know from where to define genre. So, we will refer to children's programs if the emphasis is placed on the recipients; and educational programs if we consider the purpose. However, a more refined approach to the study of genres is one that places the emphasis on the characteristics of the speech and the relationship with reality. Genre theory built in literary studies provides tools for it.²⁶

Genre is substantially a way to manage the analogy and difference and to organize the work in types of texts that have in common features of form and content. Genre involves configuring a set of invariable features by which the identity of a type of texts is defined: "In a society recurrence of certain discursive properties is institutionalized, and individual texts are produced and perceived in relation to the norm which is encoding. A genre, literary or not, is nothing else than the encoding of discursive properties".²⁷ The existence of a genre then depends on the repetition over time of that set of invariabilities, so that a "norm" is instituted, a model that works as reference both to be respected in its parameters, reproductively,

²⁶ While the arguments that have questioned the relevance of the definition of genre in literary theory for media are not ignored, it is understood here that finally they often point to the same substantive aspects of the literary genre theory, while losing on the way long matured reflections in literary studies. The discussion about the disappearance of genre has been processed in literary theory, and arguments explain, for example, the mentioned hybridization of television genres as a feature of the new television. Therefore, with the necessary precaution for the conceptual translation to the field of mass media, the conceptual support used in this analysis comes from the theory of genres explored by authors like Tzvetan Todorov, Jean-Marie Schaeffer, Gérard Genette, Oswald Ducrot and Christian Doelker, with the backdrop of the re-reading of Aristotle's *Poetics*.

²⁷ See the development of this idea and the discussion of the existence of genres in Todorov (1996:52).

as well as to contravene it. These are the dimensions of historicity and institutionality of the genre, always in tension with the variation and transformation. The historicity of the genre has two dimensions: the genre is only institutionalized by repetition, but also transforms historically in relation to the institutionalized genre system at every historical moment because “the generic component of a text is not the simple reduplication of the genre model consisting of the type of texts (above) in whose line is located. For all text in gestation the genre model is a ‘material’ on which it is worked”.²⁸

It is from this perspective that we can explain the emergence of new genres, whether in television or not, and phenomena that we identify as hybridization, which are nothing more than the expression of this dynamic nature of the genre that has exposed the theory of genres (Genette, 1986). Audiovisual products to which we refer are examples of the combination of elements from a system of television genres present in the horizon of both creators and receivers. The description of programs like *Paleodetectives* or *Los Artisionautas* highlights the repertoire of implicit knowledge about the genre system that they put into play. New on-line productions experiences, such as *Tiranos Temblad*, *Club de Canotaje* or *Uruguay Desconocido*, to which we will refer in the next pages, are manifestations of transgression to the existing genre models – documentary and fiction – and to the historically reading contracts or agreements.

Innovation is manifested on the internet

The exploration of new genres and formats in Uruguay has mainly manifested on the internet and under independent productions modality. In all of them the relationship with the documentary and humor is central, but at the same time it constitutes fictional narratives. The reading contract in which these productions fluctuates thus has a dual enrollment and constitutes the recognition that the viewer negotiates on the identity of the text.

²⁸ Schaeffer, Jean-Marie. Du texte au genre. In Gérard Genette (1986). *Théorie des genres* (p. 197). Paris: Seuil.

From the perspective of historicity and the institutionalization of genre, two broad classes of communicative pacts are configured: authentication and fictionalization, both involved in the webseries that we will discuss here. To define these two core covenants, the starting point is the Aristotelian assertion²⁹ that links genres with actions of mimesis that give news of the world and, therefore, genres suppose a different way of representing reality (understood as that which is outside the text and has a reference entity). They can be placed in a relationship of truth or untruth. In the first case, it is a kind of documentary discourse that requires correspondence with what is happening or has happened (indicates an “it is there” or an “it has been”). The texts located in this line propose an authentication contract. In the second case is the fictional speech in which the invention of a world governed by its own rules is admitted: it requires internal validation without corroboration with the externality. Artifice predominates in this communicative relationship and the proposed reading contract is fictionalization.³⁰

In the last two years (2014-2015), two webseries were produced in Uruguay, *Escuela de Canotaje* and *Uruguay Desconocido*, which were broadcast by Canal M, an internet television channel associated with the on-line news website Montevideo.com. They are composed of six chapters each, lasting about ten minutes, in humorous key. Created by young filmmakers, gathered at the producer Finoli Finoli Films³¹, these fictions are located on the ground of false docu-

²⁹ Aristóteles (1948). *Poética*. Buenos Aires: Espasa Calpe.

³⁰ It does not hold here the purity of these covenants, nor is unknown that the documentary speech also involves artifice mechanisms and the fictionalization is possible. Combinations between the two contracts are diverse and could be the subject of further consideration, but that would divert us from our purpose now. Doelker, Christian (1982). *La realidad manipulada*. Barcelona: Gustavo Gili Ed.

³¹ On February 2016, *Escuela de canotaje* was nominated as the best Ibero-American webseries by Webfest Festival of Argentina (Webfest edition, world festival of internet series that has editions in Rome, Los Angeles, Bilbao, Toronto, New York, Miami and Vancouver). The webseries won the award for best Ibero-American webseries screenplay and best supporting actress. Finoli Finoli production house, encouraged by the experience, generated several webseries projects thinking of its expansion outside Uruguay; some of them have already been sold to channels that specialize in webseries. Its mem-

mentary or mockumentary.

The mockumentary may be defined as a fictional text that adopts the rhetoric of the documentary throughout its development. In this sense, it differs from those texts that are used as documentary, but only in fragments at a time of the storytelling. It is a kind of text that appropriates the codes of the documentary genre by incorporating various own brands: the idea that the event is being recorded at that time and, therefore, everything is subject to chance; the use of rhetorical mode (*eyes on the eyes*) instead of kinematic (Allen, 1992:113); the use of interviews with mid shot, in form of talking busts; the voice-over; handheld camera that follows the movement of the characters, while evidences precarious filming and, finally, the aging of the image, which is also used as a resource. However, all these form part of a fictional world: the parodic bias is usually a mockumentary's feature of covering the own documentary and specific situations that are narrated. Almost all of these resources are present in national webseries to which we referred.

*Escuela de Canotaje*³² tells the story of a poor female boating club whose members intend to participate in the Olympic Games in Rio de Janeiro in 2016. The preparation and difficulties in obtaining money and still be accepted by the Olympic Committee are followed through six chapters. The fictional plot follows the structure of the setting of the situation and conflict, development and denouement: the goal of reaching the Olympic Games and the presentation of the adversary, Otto Limberg, leader of a boating club for the blind, the evil of the intrigue, happen in the first chapter; the following ones incorporate instances of confrontation (sabotage and kidnapping) and the story ends with the theft of funds for the trip, so the dream of participating dilutes. Fiction takes the form of documentary register: so it is explained by the character that leads the club, Daniela,

bers see on-line development as the most viable opportunity for national fiction. Interview to Gastón Armagno, conducted by the author on April 2016.

³² Production house: Finoli Finoli Films and Canal M. Scriptwriters: Gastón Armagno, Marcelo Bessonart and the participation of Bruno Conti. Direction: Gastón Armagno. Premiere: November 2014. <http://www.canalm.tv/auc.aspx?285865,1536>.

who tells the camera her intention of recording the whole process. In addition, the camera follows the actions of the characters talking to the camera, breaking the fourth wall.

In the case of *Uruguay Desconocido*³³, the fictional plot centers on the character of a young communicator, Mateo Tapino, who aims to produce an incisive news program and so is expressed in the issues he wants to address – drugs, prostitution, pornography –, with obvious reference to some local news programs. However, his arrogance and ineptitude lead him to ridiculous and/or uncomfortable situations with people he interviews until finally he is fired by the owner of Canal M, which is the place where the story unfolds while it is also the channel broadcasting the webseries. This mockumentary is part of the parodic form of the genre: the transgressive pretensions of the journalist and the family ties of those working on the program with the channel owner can be read as a parody of journalism and media.

The humor that runs through these two products can be defined as uncomfortable³⁴: situations that seem to go nowhere unfold; there is no finish for a joke, but a kind of strange humor that starts from the discomfort. It is a grotesque and absurd humor for moments when the precariousness of production away from being dissimulated is displayed as aesthetic feature of these programs. On Rio de la Plata's television, it is reminiscent of *Cha cha cha*, *Peter Capusotto* and his videos and enroots with the line opened with the rockumentary of Monty Python. They all seem to be recognizable influences in these creations.

As noted above, genre is defined by its institutionality and it has been built by practitioners, producers and receivers. The moc-

³³ Production house: Finoli Finoli, Original Canal M. Scriptwriters: Marcelo Bessonart, Gastón Armagno, Ale Palmero. Direction: Gastón Armagno, Ale Palmero. Premiere: September 2014 and broadcast during that year. Chapters are still available on Canal M: <http://www.canalm.tv/auc.aspx?248126,1403>.

³⁴ Esteban Menis, who plays Mayer in *Eléctrica*, refers to the “uncomfortable as diversion” in a definition that seems to be accurate. <http://www.elobservador.com.uy/trisas-incomodas-formato-digital-n293996>.

kumentary is a good example of how its production is related to genre system historically consolidated. At the same time, the receptor plays a key role: the genre works because the viewer knows its rules, can recognize the resources that allude to a fake contract and register authentication in the fictionalization³⁵ pact. In this sense you could say that genre is the result of a co-construction.³⁶ The mockumentary transgresses the rules of fiction and documentary to give birth to a new genre, but, for its existence, needs the validity of these two institutional frameworks, because, as Todorov (1996:49) states:

The fact that the work ‘disobeys’ their genre does not mean that it no longer exists; one might even be tempted to say otherwise. And this for two reasons. First, because the transgression, to exist, needs a law that just has to be transgressed. One could even go further: the norm is not visible – it does not exist –, but thanks to its transgressions.

The reconstruction of the historicity of fake documentary as a genre refers, to some authors, to Welles and *The War of the Worlds*. Since then, it is possible to tour different kinds of works, among which stand out Woody Allen’s *Zelig*, *Borat*, or *The Blair Witch Project*, which show the broad spectrum covering drama, comedy, horror, parody or satire. With regards to the television, the BBC series *The Office* is the most recognized and inspiring antecedent of products for those produced in Uruguay in the last two years for the web. It is also important to note that the mockumentary is often

³⁵ Both actions, the one of the text producer and that of the readers, oscillate in Genette’s definition of transtextuality.

³⁶ This aspect is particularly evident when new kinds of texts arise that burst in the genre system: then, genre identity, its institutionality, is not made and the receivers end up by defining its traits. An illustration of this process is studied in *Ficción contra realidad*, by Sánchez Vilela, from the first issue of *Gran Hermano* in Uruguay, and also in the work of S. Livingstone and P. Lundt when studying the emergence of the debate as television genre. See: Un público activo, un telespectador crítico. In Dayan, D. (1997). *En busca del público* (p. 169-185). Barcelona: Gedisa.

used to disguise the low-budget production, as it is mostly the case of domestic productions.

Perhaps the most important case in terms of innovation generated by young filmmakers is *Tiranos Temblad*, which, although it is not a proper fiction, is a phenomenon that cannot be excluded from a chapter dealing with reformulation of genres in domestic production. Also in this case, the relationship with the documentary arises: it is a fake newscast on Uruguay in humorous and ironic key. Each episode, that its creator Agustín Ferrando hangs weekly or fortnightly on YouTube, is composed of a collection of videos posted by people on the internet of diverse, domestic, minimum and irrelevant situations, sometimes comic or grotesque. The narrator spins with his voice-over the “Uruguayan weekly summary of events”. And all framed by the program’s title referring to the national anthem, but not at any time during the anthem. The term “tiranos temblad” (tyrants tremble) is the most expressive of strength and courage in defending freedom, while “all this happened in a week” – phrase that concludes each episode – produces an ironic play with respect to the title. “Uruguay is the best country, better than France and better than Paris” is a sentence of the song that accompanies each issue and was found by Ferrando in a video posted on the internet. The song was created by Russian violinist Aleksey Igudesman and Korean pianist Hiung-Ki Joo. The YouTube channel where *Tiranos Temblad* is broadcast has more than two million visits and each episode reaches 70 thousand views. The phrase of the song popularized so much that the Ministry of Tourism even hired Igudesman to record the song in Uruguay and used it in its tourism campaign. *Tiranos Temblad* began in late 2012 and has aired 74 episodes. Its creator has received several proposals to sell the format, but his decision has been not to sell it. Its existence seems to remain outside the traditional television.

The various manifestations of national television production have in one way or another a relationship with the documentary genre. In broadcast television, productions that combined fiction

with documentary were exhibited, resulting in an educational fiction; on the internet, fiction has fused with the documentary language and took the form of mockumentary or new formats have emerged, such as the phenomenon of *Tiranos Temblad*. The relevance and prestige of the documentary is manifested in different ways in the national audiovisual landscape: independent producers tend to be inclined to this type of production, there are energizing and legitimizing spaces for projects developed on this line, as DocMontevideo³⁷, which is done annually and does not have its replica for fiction. Spaces for national television fiction seem still uncertain.

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³⁷ DocMontevideo is a meeting of television broadcasters and documentary filmmakers from Latin America that has been taking place in Montevideo for eight years.

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VENEZUELA: TELEVISION IN TIMES OF CRISIS

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1. Venezuela's audiovisual context in 2015

In the course of 2015 the severe social, economic and political crisis lived in Venezuela showed the following numbers: 5,851 protests² and more than 287 plunders or plunders attempts according to the Venezuelan Observatory of Social Conflict (OVCS, 2016). The account of violent murders was 27,875 for a valuation of 90 deaths for every 100,000 inhabitants. The National Consumer Price Index (INPC, in Spanish), according to the official numbers, was 108.7%; however, the non-official numbers situate it on 270.7%. Among the main economic crisis causes are the deplorable public expenditure management, the uncontrolled corruption, the outflow of capital, the lack of investment and the exchange control, which stimulates the circulation of a parallel dollar overvalued 157 times the official price. The political crisis is evident in the radicalization of confrontation and polarization, the low popularity of political leaders, the intervention of military power in civil matters, the bad

¹ Special thanks to AGB Nielsen Media Research for their selfless collaboration in the development of this research, especially to Alejandra Cuttone and Rossy Moreno, for their valuable contributions. This work is part of Group Project "Venezuela cuadro a cuadro. Panorama audiovisual de una década 2002-2012", Code: PG-07-8766-2013-2, funded by the Council for Scientific and Humanistic Development (CDCH) of the Central University of Venezuela (UCV), under Dr. Morella Alvarado Miquilena responsibility.

² This is equivalent to 16 daily protests, which happen mainly for claims related to social rights: labor rights – 1,910; housing and basic services requests – 1,542; rejection to lack of food, medicine and hygiene products – 1,064; public safety, rights of persons deprived of liberty and right to justice – 656; political rights – 382; and educational requirements – 297.

administration of justice and non-separation of powers. Individually, a forthright breakdown of the emotional stability is perceived in those living in Venezuela.

1.1. Open television in Venezuela

Chart 1. National open television networks/channels in Venezuela

PRIVATE NETWORKS/ CHANNELS (9)	PUBLIC NETWORKS/CHANNELS (7)
Canal I	Fundación Televisora de la Asamblea Nacional de Venezuela – ANTV
Globovisión	La Nueva Televisión Del Sur C.A. – Tele Sur
La Tele	Fundación Televisora Venezolana Social – TVes
Meridiano Televisión	Visión Venezuela – Vive TV
Televen	Colombeia – La Televisora Educativa de Venezuela
TV Familia	Compañía Anónima Venezolana de Televisión – VTV
TVepaco	TV FANB
Vale TV	
Venevisión	
TOTAL NETWORKS = 0 TOTAL CHANNELS = 16	

Source: Obitel Venezuela

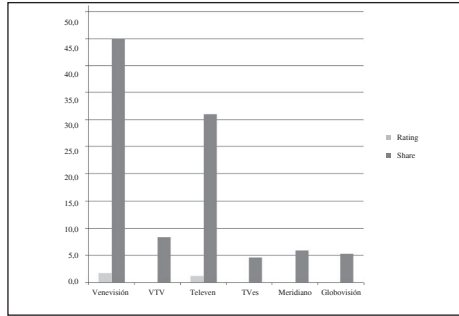
Regarding to Chart 1, La Tele ceased operations in May 2015. On August 31st, a new channel, TVepaco, began operations through the signal previously used by Omnivisión and Marte Televisión. ANTV signal was suspended on December 31st, 2015 and reestablished on January 5th, 2016 on testing period under the name Fundación Audiovisual Nacional de Televisión. With this new change, the count ends in 15 television stations, including public and private, with open signal transmissions, Digital Broadcast Television (TDA, in Spanish) and subscription, whose editorial line is allied to the government project.³

³ Public channels: 123 TV (TDA); Alba TV; ANTV; Ávila TV (open signal with local reach); Colombeia TV; TV ConCiencia; (TDA); Pdvas TV; Telesur (International); TVes; TVFANB (open TV, TDA and cable TV); TV Comunas; Venezolana de Televisión (VTV); Vive TV (eight regional headquarters); ZUM TV. Private channels: Glo-

Graph 1. TV audience and share by broadcasting station ⁴

Channel	Rating	Share
Venevisión	1.84	44.81
Televen	1.27	30.92
Meridiano	0.24	5.85
Globovisión	0.22	5.36
Tves	0.19	4.63
VTV	0.35	8.43
TOTAL	4.11	100

Source: Obitel Venezuela

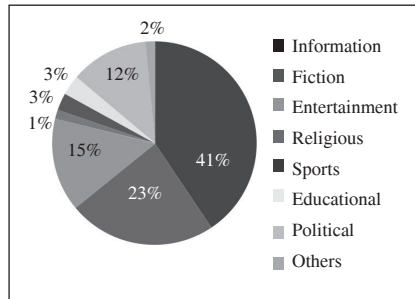


It is important to highlight that Tves and VTV, both state channels, are those with the lowest ratings and share, yet their numbers have risen slightly compared to previous years.

Graph 2. Genres and number of hours broadcast on TV programming

Genres broadcast	Total hours broadcast	%
Information	27:110:55	40.7
Fiction	15:578:53	23.4
Entertainment	9:776:02	14.7
Religious	1:028:35	1.5
Sports	1:828:35	2.7
Educational	2:076:00	3.1
Political	8:276:30	12.4
Others	1:024:28	1.5
TOTAL	66:700:08	100

Source: Obitel Venezuela



Graphs 1 and 2 were made with data of only six channels, as it is not possible to have access to the appropriate information. To this

bovisión. Alba TV, despite its presentation as a community international channel for the geopolitical communication promotion, in practice, works as a distribution channel of governmental interest content.

⁴ The data, obtained through various sources, refer to the measurement of individuals and the average monthly indexes obtained for each of these stations. The calculation of share was made based on own estimates.

fact, we add that: 1. the two channels that broadcast greater amount of fiction (Televen and Venevisión) are taken into consideration; 2. two state channels (TVes and VTV) were selected; 3. two thematic channels (Meridiano TV, specialized in sports, and Globovisión, specialized in information) were included. In addition, there are a few channels that actually have available information. As in previous years, most of the programming grid is occupied by the informative genre, in different formats, such as morning, evening and night newscasts, special broadcasts and talk shows. The data presented correspond to the registration of the first six months of the year. We noticed an increase in the amount of hours of informative content compared with the previous year. Fiction is ranked lower, as *telenovelas* had greater role in the programming of broadcast television in Venezuela. The series, miniseries and docudramas passed to second place. During the months of June and July, public television stations put aside their regular programming to broadcast almost simultaneously matches of 2015 Copa America, the 2015 Toronto Pan American Games and, like every year, the season of the Venezuelan Professional Baseball League, which is broadcast for at least five months a year.

1.2 Audience trends in 2015

Anew, fiction and entertainment programs are the most preferred by the audience, even at the time when citizens interests were focused on the parliamentary elections held on December 6th, 2015. This trend was reflected during the week of November 23-27, when, on the campaign trail, the most watched programs in the main private television stations were: *telenovela Amor Secreto* (Venevisión), film *Hasta el fin del Mundo* (Televen) and a match of the Venezuelan Professional Baseball League (Meridiano TV) (AGB Nielsen Venezuela, 2015).

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

The investment in advertising by 939 advertisers was equivalent to Bs. 30,593,401,625.00, amount from which investments of

companies and government institutions are excluded. This number is equivalent to 4.12% of the proposed budget revenues and financing sources of the Republic, estimated by the Venezuelan government for 2015, for an amount of Bs. 741,707,523,894.00. The amount for advertising investment accounts Venevisión, VTV, Televen, Globovisión, Meridiano, La Tele, Vive TV, TVes and Canal I. The first 50 advertisers are grouped in the following areas: food and beverage (Bs. 8,457,526,428.00); banking (Bs. 742,202,178.00); cosmetics and perfumery (Bs. 2,329,400,345.00.); courses (Bs. 292,956,953.00); sports (Bs. 229,210,545.00); pharmaceuticals (Bs. 464,131,831.00); hardware stores (Bs. 600,645,821.00.); toy stores (Bs. 255,503,899.00.); insurance (Bs. 1,331,673,286.00); management services (Bs. 168,395,384.00); technology and telecommunication (Bs. 1,019,757,547.00); department stores (Bs. 411,783,501.00.); tourism and hospitality (Bs. 172,787,161.00); shoemaking and clothing (Bs. 3,030,941,617.00).

1.4. Merchandising and social merchandising

During 2015, the provisions of the Law on Social Responsibility in Radio, Television and Electronic Media (hereinafter LRSRTV-ME, 2011), which prohibits direct merchandising, remained in exercise. As in previous years, some TV stations incorporated social merchandising spaces within its programming, including Venevisión, Televen and Canal I. Venevisión kept the campaign “Somos lo que queremos”. A protruding element of this campaign is the interaction generated through social networks with public institutions and civil society groups. The channel also maintained the campaigns “El buen venezolano”, “Al acoso escolar, sácalo del juego” and “Al natural es mejor” inside the news program *Noticiero Venevisión*. It is worth noting the transmedia strategies used in the campaign against bullying in classrooms and community spaces, such as briefings. Venevisión also joined the campaign for the prevention of early pregnancy called “Si te apuras, ¿qué ganas?”. Moreover, Televen transmitted the campaign “Lo bueno se pega, ponte a valer”, dedi-

cated to promoting perseverance, responsibility, solidarity, honesty, optimism and country building. It kept in its grid the programs *Se Ha Dicho* (legal advice and recommendations for conflict resolution) and *La Vida es Hoy* (recommendations for growth and human development).

1.5. Communication policies

The transmission of national and international fictions was modified, including editions and abrupt transitions in their content, to conform to the provisions of the LRSRTV-ME (2011). This affected the narrative thread of the stories, as happened with *telenovela Avenida Brasil*, broadcast by Televen. On September 10th, 2015, the Supreme Tribunal of Justice, which is the highest court in the country, declared unenforceable the decision of the Inter-American Court of Human Rights, which ordered the immediate restoration of the signal of Radio Caracas Televisión (RCTV). On December 10th, 2015, the National Assembly passed the Communication Law of People's Power, which politicizes the work of community television stations and makes them dependent on the national government. Among other reasons, the National Council of Popular Communication is attached to the Vice Presidency of the Republic because, out of the 15 representatives which make it up, eight are representatives of executive bodies and only seven are representatives of Popular Communication Councils. Add to this the fact that all the strategic actions must be registered within the national government plans.

1.6. Information and Communication Technology (ICT) trends

During 2015, only 61 out of every 100 residents had internet access. Service penetration reached 61.48%, according to records of the National Telecommunications Commission (Conatel, in Spanish), which implies growth of just 1% in relation to 2014 and a slowdown in the growth of number of users. The number of subscribers was 3,630,558, for a total of 16,412,616 users (Conatel, 2015a): 68.87% (2,500,341) of subscribers belong to the residential cate-

gory; 23.19% (841,868) used mobile internet; and 7.94% (288,349) were in the non-residential category (Conatel, 2015b). The internet speed in Venezuela stood at 1.5 Mbps, ranking last among Latin American countries, beside Paraguay, according to the report *Akamai's State of the Internet Q3 2015*. Due to the self-censorship that exists in the mass media nationwide, internet has become the information center of reference in the country. In recent years digital media oriented to investigative journalism and depth journalism were created. Social networks Twitter and Facebook are important reference information channels for citizens.

The penetration of mobile telephony had a decrease of 5% compared to 2014, a total of 30,828,344 subscribers (1,190,742 less than the previous year) and 101 lines per 100 inhabitants (Conatel, 2015c). The sector suffered a decline due to the severe economic crisis. This is evidenced by the difficulties such as: importing and replacing mobile phone equipment; the high incidence of mobile phone thefts amid a context of severe insecurity and criminality; and the excessive cost of equipment and spare parts. Despite the limitations reported, Conatel said that, by the end of the first quarter of 2015, the country had 11,613,531 smartphones (Conatel, 2015d).

Digital Broadcast Television (TDA), at the end of 2015, amounted to 995,737 users who receive the signal through set-top boxes and TV sets and 1,190,698 mobile phone users (state company Movilnet) who receive TDA signal through an application on their mobile phones (Cantv, 2015). TV contents under video on demand (VoD) system are at an early stage in Venezuela. Restrictions on access to foreign exchange limit the purchase of imported for both the end user (receiver) and for companies that offer the service. The slowness of the internet in Venezuela is an obstacle to downloading video content. As a result, the television market is a standstill demand in the country.

1.7. Public TV

During 2015 Tu Comuna TV was created, with the support of the Capital District government. It is a network that broadcasts programs through the internet and disseminates information about the Community Councils (instances for the participation of citizens acting as organs of articulation and defense of policies and ideology of the national government). The public media function as organs of dissemination of propaganda of the ruling party. Even fiction and entertainment programs have a political bias. *Guerreras y Centauros*, a *telenovela* broadcast by TVEs, in its first chapter included an introduction in which late President Hugo Chávez and his administration were praised. The use of public media was frequent for the dissemination of threats, insults and information related to the private life of journalists, opinion leaders, human rights defenders and important political leaders. The same did President Nicolas Maduro Moros in official speeches or chains of free and compulsory transmission of all radio and television stations across the country. In 2015, the TV government chains reached 146 hours, 39 minutes and 42 seconds (Cantv, 2015)

1.8. Pay TV

Pay TV penetration reached 66.86% for a total of 1,403,474 households that have this service, according to the Latin American Multichannel Advertising Council (Lamac, 2016). The universe of individuals with TV used to generate the information handled by Lamac is 9,404,021 subjects⁵, equivalent to 30.07% of the population of the country⁶, while the households universe is 2,099,111. The distribution of the universe by socioeconomic level is: high segment (A, B, C) – out of 440,960 households, 382,149 have pay

⁵ Lamac uses data from AGB Nielsen Venezuela measurement of the cities with the highest population density: Caracas, Maracaibo, Valencia, Barquisimeto, Puerto La Cruz and Ciudad Guayana. Quantification follows the parameters established in the *Global Guidelines for Television Audience Measurement* (GGTAM).

⁶ Venezuelan population for 2015 was projected in 31,267,000 inhabitants, according to the Economic Commission for Latin America and the Caribbean (Cepal).

TV (86.66%); middle segment (D) – out of 1,099,845 households, 755,449 (68.69%) have pay TV; lower segment (E) – out of 558,306 households, 265,876 (47.62%) have pay TV. In relation to 2014, there is an increase in pay TV of 9.22% (Conatel, 2015a). The percentage of satellite subscribers is 69%, compared to 31% of cable subscribers. The percentages of provision of pay TV service (cable and/or satellite) for content distribution companies are: Inter-Cable (32.5%); DirecTV (28.2%); Cantv (6.4%); Net Uno (4.3%); Movistar/Telefónica (3.9%); Supercable (3.7%); and others (21%).⁷ Exchange control imposed in the country since 2003 affects the growth of pay TV in Venezuela.⁸

1.9. Independent producers

National production is regulated by the LRSRTV-ME. We consider national productions the works containing at least six of the following eight elements: 1. Venezuelan capital; 2. Venezuelan locations; 3. Venezuelans screenplays; 4. Venezuelan authorship; 5. Venezuelan directorate; 6. Venezuelan artists; 7. Venezuelan technicians; 8. values of Venezuelan culture. To be classified as independent, a national production must be registered within the Ministry of People's Power for Communication and Information (MinCI, in Spanish) and its responsible must not have any kind of relation with public entities or services regulated by the LRSRTV-ME or entities providing radio television services.

Each broadcast TV station in the country is required to include in its daily grid a minimum of five hours of Independent National Production (PNI, in Spanish), which is a mode of production that arises with the idea of promoting the inclusion of content generated by the citizens. Certification as PNI lasts two years and is renewable. The action of PNIs is supervised and promoted through the

⁷ These data are presented without considering the pirate subscribers, which have various strategies to use the services without a subscription.

⁸ The national channels of pay TV, which are also internationally available, are: Canal Plus; DirecTV Sports Venezuela; Sun Channel; TV Venezuela; TVR; Ve Plus TV; and Venevisión Plus.

MinCI's General Directorate of Social Responsibility and Independent National Production. Among the fiction contents offered in the catalog of PNI-Conatel are: *Heroínas del Oriente* (series, 12 chapters, 30 min.); *Nos Vemos en el Espejo* (comedy, ten chapters, 21 min.); *Un Hotel de Locura* (comedy, ten chapters, 21 min.); *Autolisis* (unitario, 90 min.); *Saga Bicentenario* (saga, three chapters, 26 min.); *Sucre, el Mariscal de América* (series, six episodes, 24 min.); *Teresa en Tres Estaciones* (series, 20 chapters, 42 min.); *Mía Magdalena* (unitario, 90 min.); *Guerreras y Centauros* (telenovela, 105 episodes, 41 min.); *Barrio Sur* (series, 13 chapters); *El Diario de Bucaramanga* (miniseries, three chapters).

1.10. International trends

Within international trends in television, we observe the expansion of platforms for the display of digital content in multimedia format that allows interaction, which requires diversification of formats and narratives. An example of this is the streaming service offered by Netflix, Drama Fever, Google Play Movies, Amazon Prime Instant Video or Crackle, which can be accessed through devices like Chromecast, Apple TV, Fire TV Stick, ezCast, Roku or smart TVs. In Venezuela, paid streaming technology is offered through Play.net Live, which broadcasts movies, series, news, documentaries, variety shows and *telenovelas*, some produced in Venezuela. The company also established a strategic alliance with US distributor Alterna TV and added to its offer PX TV sports channels, Latin American Sports and AYM Sports, for the audience from Mexico, Puerto Rico and Cuba, besides channels TV Venezuela (United States), Meridiano (Venezuela), Telefe (Argentina) and Caracol (Colombia). Its aim is to become a leading company in the continent. Also, Compañía Anónima Nacional de Teléfonos de Venezuela (Cantv), which is a state company, added to its offer the option of IPTV, available in Caracas, capital of Venezuela, which includes the possibility of watching video on demand. It is worth remembering that access to any of these technologies is very limited and expensive due to state

control of foreign exchange. Still, content is offered in Bolívar on websites like MercadoLibre.com, but with unaffordable prices for the average consumer.

In short, the economic crisis affecting Venezuela, government restrictions expressed in restrictive laws and high levels of inflation, which generate unconscionable and recurring increases in the prices of goods and services, have hit Venezuelan private television companies, generating poor production of television fiction. Meanwhile, public television has handled generous financial resources that were invested in strengthening government propaganda, which has had a counterpart in premiere national *telenovela*.

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

Table 1. Fiction broadcast in 2015 (national and foreign; premieres and reruns; and co-productions)

<p>PREMIERE NATIONAL TITLES – 5</p> <p>Venevisión – 2 titles</p> <p>1. <i>Amor Secreto</i> (<i>telenovela</i>)</p> <p>2. <i>Cartas del Corazón</i> (capsules)</p> <p>Televen – 1 title</p> <p>3. <i>A Puro Corazón</i> (<i>telenovela</i>)</p> <p>TVes – 2 titles</p> <p>4. <i>Guerreras y Centauros</i> (<i>telenovela</i>)</p> <p>5. <i>Vivir para Amar</i> (<i>telenovela</i>)</p> <p>PREMIERE FOREIGN TITLES – 33</p> <p>Venevisión – 9 titles</p> <p>6. <i>Amores con Trampa</i> (<i>telenovela</i> – Mexico)</p> <p>7. <i>Como Dice el Dicho</i> (series – Mexico)</p> <p>8. <i>DeMente</i> (series – Estados Unidos)</p> <p>9. <i>La Rosa de Guadalupe</i> (Docudrama – Mexico)</p> <p>10. <i>Lo que la Vida Me Robó</i> (<i>telenovela</i> – Mexico)</p>	<p>32. <i>Una Familia con Suerte</i> (<i>telenovela</i> – Mexico)</p> <p>33. <i>Volver a Nacer</i> (miniseries – Argentina)</p> <p>34. <i>Violetta</i> (youth series – Argentina)</p> <p>Colombeia – 1 title</p> <p>35. <i>El Show de Perico</i> (capsules – Colombia)</p> <p>CO-PRODUCTIONS – 2</p> <p>Televen – 2 titles</p> <p>36. <i>Desenterrando a Mi Suegra</i> (miniseries – Venezuela/Panama)</p> <p>37. <i>Escándalos</i> (unitario – Venezuela/Mexico/USA/Panama)</p> <p>RERUNS – 21</p> <p>Venevisión – 9 titles</p> <p>1. <i>El Chavo</i> (series – Mexico)</p> <p>2. <i>La Viuda Joven</i> (<i>telenovela</i> – Venezuela)</p>
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11. <i>Los Hombres También Lloran</i> (series – Colombia)	3. <i>Natalia del Mar</i> (telenovela – Venezuela)
12. <i>Mamá También</i> (series – Colombia)	4. <i>Por Siempre Mi Amor</i> (telenovela – Mexico)
12. <i>Mi Corazón Es Tuyo</i> (telenovela – Mexico)	5. <i>Qué Clase de Amor</i> (youth telenovela – Venezuela)
14. <i>Que Te Perdone Dios, Yo No</i> (telenovela – Mexico)	6. <i>Teresa</i> (telenovela – Mexico)
Televen – 11 titles	7. <i>Tomasa Te Quiero</i> (telenovela – Venezuela)
15. <i>Alma de Hierro</i> (telenovela – Mexico)	8. <i>Válgame Dios</i> (telenovela – Venezuela)
16. <i>Avenida Brasil</i> (telenovela – Brazil)	9. <i>Voltea pa' que Te Enamores</i> (telenovela – Venezuela)
17. <i>Carrusel</i> (telenovela – Brazil)	TVes – 2 titles
18. <i>Confesiones del Más Allá</i> (series – Mexico)	10. <i>India, una Historia de Amor</i> (telenovela – Brazil)
19. <i>Hasta el Fin del Mundo te Amaré</i> (telenovela – Mexico)	11. <i>Zorro, la Espada y la Rosa</i> (telenovela – Colombia)
20. <i>La Impostora</i> (telenovela – Mexico)	Televen – 10 titles
21. <i>La Mujer del Vendaval</i> (telenovela – Mexico)	12. <i>11-11: En Mi Cuadra Nada Cuadra</i> (youth series – USA)
22. <i>La Vida Sigue</i> (telenovela – Brazil)	13. <i>Carita Pintada</i> (telenovela – Venezuela)
23. <i>Miss XV</i> (telenovela – Mexico)	14. <i>El Desprecio</i> (telenovela – Venezuela)
24. <i>Para Volver a Amar</i> (telenovela – Colombia)	15. <i>El Sueño de Leo</i> (youth miniseries – Venezuela)
25. <i>Yo Amo a Juan Querendón</i> (telenovela – Mexico)	16. <i>La CQ</i> (sitcom – Venezuela/Mexico)
Canal I – 2 titles	17. <i>Guayoyo Express</i> (telenovela – Venezuela)
26. <i>El Secreto de Toño Palomino</i> (telenovela – Argentina)	18. <i>La Mujer de Judas</i> (telenovela – Venezuela)
27. <i>El Cholito</i> (telenovela – Ecuador)	19. <i>Mi Prima Ciela</i> (telenovela – Venezuela)
TVes – 7 titles	20. <i>Pantanal</i> (telenovela – Brazil)
28. <i>Amores de Historia</i> (unitario – Argentina)	21. <i>Viva la Pepa</i> (telenovela – Venezuela)
29. <i>Cuento Encantado</i> (telenovela – Brazil)	TOTAL PREMIERE TITLES: 37
30. <i>Lado a Lado</i> (telenovela – Brazil)	TOTAL RERUN TITLES: 21
31. <i>Porque el Amor Manda</i> (telenovela – Colombia)	TOTAL BROADCAST TITLES: 58

Source: Obitel Venezuela

Table 1 highlights, as in previous years, that fiction broadcast in Venezuela is maintained thanks to the purchase of broadcasting rights of fiction produced both in Obitel scope and in other contexts. In the case of premiere, the highest percentage (35%, 14 titles) corresponds to Mexico, followed by Brazil and Colombia (with 12.5%,

five titles each). Venezuela reduced its premiere to five – in the previous year, they were seven – and included two co-productions in which emphasizes the participation of Panama. Among premiere, but not shown in the table, are: Canadian *Hospital Esperanza*; Italian miniseries *Tierra Indomable*, Korean telenovela *Cuento de Otoño* and Iranian series *Split Entre Dos Mundos*. Another interesting aspect is the increase of Argentine productions compared to 2014. Canned fiction from English-speaking USA are maintained, including *Escena del Crimen Las Vegas*, *Escena del Crimen Miami* and *Escena del Crimen New York*. During 2015, Venevisión broadcast several national youth series within the space of children’s program *Atómico*.⁹

Table 2. Premiere fiction in 2015: countries of origin

Country	Titles	%	Chapters/ episodes	%	Hours	%
NATIONAL (total)	7	18.9	502	17.7	467:00:00	20.4
OBITEL COUNTRIES (total)	30	81.1	2329	82.3	1826:00:00	79.6
NON OBITEL COUNTRIES (total)	0	0.0	0	0.0	0:00:00	0.0
Argentina	4	10.8	282	10.0	211:00:00	0.0
Brazil	5	13.5	448	15.8	334:00:00	0.0
Chile	0	0.0	0	0.0	0:00:00	0.0
Colombia	5	13.5	485	17.1	382:00:00	0.0
Ecuador	1	2.7	93	3.3	0:00:00	0.0
Spain	0	0.0	0	0.0	0:00:00	0.0
USA (Hispanic production)	1	2.7	52	1.8	39:00:00	0.0
Mexico	14	37.8	1031	36.4	790:00:00	0.0
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	5	13.5	459	16.2	467:00:00	0.0
TOTAL	37	100.0	2831	100.0	2293:00:00	100.0
National co-productions	2	0.0	43	0.0	0:00:00	0.0
Ibero-American co-productions	37	0.0	2831	0.0	0:00:00	0.0

Source: Obitel Venezuela

⁹ Unfortunately the transmission details of those fiction productions were not provided by the production team of *Atómico*. For this reason, the information was not included in this chapter.

Table 2 shows that the number of national productions remained at seven, implying a decrease of two titles in relation to 2014. However, there were two co-productions with Panama, a country that had not been included in Venezuelan fiction along the past nine years. Venevisión had two premieres, but, actually, it only produced one, since *Cartas al Corazón* is a program that includes fragments of dramatization, so we believe that there is a production work in it in which fiction is present. Also it is worth highlighting the presence of fiction in production aimed at children, namely *El Show de Perico*, in which dramatized short stories are included using the puppet theater as a technique and presented through Colombia, Venezuelan educational broadcaster.

Table 3. Co-productions

Co-productions	Titles	Co-producer countries	Producers	Format
Venezuela + Obitel countries	-	-	-	-
TOTAL TITLES CO-PRODUCED WITH OBITEL COUNTRIES: 0				
Venezuela + non Obitel countries	-	-	-	-
TOTAL TITLES CO-PRODUCED WITH NON OBITEL COUNTRIES: 0				
Other Obitel countries + non Obitel Countries	<i>Desenterrando a Mi Suegra</i>	Venezuela/ Panama	Esbozo Producciones Televisora Nacional (TVN)	Miniseries
	<i>Escándalos</i>	Venezuela/ USA/Mexico/ Panama	Telegen, Caaliopie Productions, Pop- cornbrain, Nirvana Films, Nitro Group, Emotion TV AD & Films, VIP 2000, Ideas Estudios	<i>Unitario</i>
TOTAL TITLES CO-PRODUCED BY OTHER OBITEL COUNTRIES + NON OBITEL COUNTRIES: 2				
TOTAL CO-PRODUCTIONS: 2				

Source: Obitel Venezuela

The co-production is an alternative to generate content in Venezuela, given the severe crisis that there has been for several years, and Telegen is the channel that acquires such co-productions. *De-*

senterrando a Mi Suegra is a miniseries that counted with Venezuelan talent in the direction, production and some performances, that is why it is classified as national production. The project, with three chapters, was recorded in 2014 and included the participation of Televisora Nacional (TVN), from Panama. The second production, *Escándalos*, is a series of *unitarios* based on real life cases, which involved a lot of writers and a diverse technical team in each country that participated of the production.

As shown in Table 4, the time slot in which national fiction is mostly broadcast is prime time. However, some of the contents are broadcast in shorter formats and as reruns. Likewise, changes in the grid seem to be a practice that broadcasters have established, especially TVEs.

Table 5 shows that *telenovela* is the favorite format in Venezuelan television programming, followed by series aimed at young audience. This shows that there are possibilities of generating productions in other formats such as miniseries and series of *unitarios* as a strategy to expand the supply.

Table 4. Chapters/episodes and hours broadcast by time slot

Time slot	National			Ibero-American			Total		
	C/E	%	H	C/E	%	H	C/E	%	H
Morning (6:00 - 12:00)	3	0.6	1:00:00	0	0.0	0:00:00	3	0.1	1:00:00
Afternoon (12:00 - 19:00)	0	0.0	0:00:00	1050	45.1	826:00:00	1050	37.1	826:00:00
Prime time (19:00 - 22:00)	499	99.4	466:00:00	789	33.9	646:00:00	1288	45.5	1112:00:00
Night (22:00 - 6:00)	0	0.0	0:00:00	0	0.0	354:00:00	490	17.3	354:00:00
Total	502	100.0	467:00:00	2329	100.0	1826:00:00	2831	100.0	2293:00:00

Source: Obitel Venezuela

Table 5. Formats of national and Ibero-American fiction

Format	National			Ibero-American					
	Titles	%	C/E	H	%	Titles	C/E	%	H
<i>Telenovela</i>	4	57.1	401	79.9	394:00:00	21	1814	77.8	1421:00:00
<i>Series</i>	0	0.0	0	0.0	0:00:00	6	314	13.5	245:00:00
<i>Miniseries</i>	1	14.3	3	0.6	1:00:00	1	13	0.6	13:00:00
<i>Telefilm</i>	0	0.0	0	0.0	0:00:00	0	0	0.0	0:00:00
<i>Unitario</i>	1	14.3	32	6.4	32:00:00	2	88	3.8	88:00:00
<i>Docudrama</i>	0	0.0	0	0.0	0:00:00	0	0	0.0	0:00:00
<i>Others (soap opera, etc.)</i>	1	14.3	66	13.1	40:00:00	1	102	4.4	59:00:00
Total	7	100.0	502	100.0	467:00:00	31	2331	100.0	1826:00:00

Source: Obitel Venezuela

Table 6. Formats of national fiction per time slot

Formats	Morn- ing	%	After- noon	%	Prime time	%	Night	%	To- tal	%
<i>Telenovela</i>	0	0.0	0	0.0	4	66.7	0	0.0	4	57.1
Series	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Miniseries	0	0.0	0	0.0	0	0.0	1	100.0	1	14.3
Telefilm	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
<i>Unitario</i>	0	0.0	0	0.0	1	16.7	0	0.0	1	14.3
Docudrama	0	0.0	0	0.0	0	0.0	0	0.0	0	0.0
Others (soap opera, etc.)	0	0.0	0	0.0	1	16.7	0	0.0	1	14.3
Total	0	0.0	0	0.0	6	100.0	1	100.0	7	100.0

Source: Obitel Venezuela

According to Table 6, in the last year the concentration of national fiction in Venezuela is at prime time. This time slot is reserved for the transmission of *telenovelas* as in previous years. The morning schedule is reserved for the transmission of other types of content, especially news and varieties.

Table 7. Time period in which fiction is set

Time	Titles	%
Present	6	85.7
Period	0	0
Historical	1	14.3
Other	0	0.0
Total	7	100.0

Source: Obitel Venezuela

Table 7 shows that the offer maintained the dominant trend of productions aimed at the present time. Venezuelan *telenovela* *Guererras y Centauros* is set in the 19th century, between the years 1821 and 1863. Shooting began in 2012 and, after innumerable conflicts, ended in 2014, despite being financed by the Social Responsibility Fund and the Presidency of the Bolivarian Republic of Venezuela since 2007. This is what explains that, even at a time of severe crisis, national production of this magnitude is released.

Table 8. The ten most watched titles: origin, rating, share

	Title	Country of original idea or script	Production house	Channel	Scriptwriter or author of the original idea	Rating	Share
1	<i>Lo que la Vida Me Robó</i>	Mexico	Televisa	Venevisión	Caridad Bravo Adams	4.67	22.37
2	<i>Avenida Brasil</i>	Brazil	Globo	Televen	João Emanuel Carneiro	4.17	18.40
3	<i>Mi Corazón Es Tuyo</i>	Mexico	Televisa	Venevisión	Ana Obregón	4.11	19.10
4	<i>Voltea pa' que Te Enamores</i>	Venezuela	Venevisión	Venevisión	Mónica Montañez	3.70	22.86
5	<i>Amores con Trampa</i>	Mexico	Televisa	Venevisión	Carlos Oporto, David Bustos, Jaime Morales	3.44	17.65
6	<i>Amor Secreto</i>	Venezuela	Venevisión	Venevisión	César Sierra	3.34	17.61
7	<i>Válgame Dios</i>	Venezuela	Venevisión	Venevisión	Mónica Montañez	3.18	21.63
8	<i>La Rosa de Guadalupe</i>	Mexico	Televisa	Venevisión	Carlos Mercado Orduña	3.14	20.07
9	<i>Confesiones del Más Allá</i>	Mexico	TV Azteca	Televen	Various	2.66	15.05
10	<i>Por Siempre Mi Amor</i>	Mexico	Televisa	Venevisión	Abel Santa Cruz, Eric Vonn	2.90	19.24
Total productions: 10				Foreign scripts: 7			
100%				70%			

Source: Obitel Venezuela and ABG Nielsen Venezuela

Just as during 2014, a foreign production has the first place in the top ten list. Two of the Venezuelan scripts belonging to Monica Montañez are reruns, fact that draws attention to the preferences of the audience, which has not been particularly seduced by the new national productions, except for the story presented by Cesar Sierra.

Table 9. The ten most watched titles: format, length, time slot

	Title	Format	Genre	Number of chap./ ep. (in 2015)	First and the last transmission (in 2015)	Time slot
1	<i>Lo que la Vida Me Robó</i>	<i>Telenovela</i>	Drama	115	10/01/2014-06/24/2015	Prime time
2	<i>Avenida Brasil</i>	<i>Telenovela</i>	Drama	72	08/13/2014-04/20/2015	Prime time
3	<i>Mi Corazón Es Tuyo</i>	<i>Telenovela</i>	Drama	96	08/14/2014-06/24/2015	Prime time
4	<i>Voltea pa' que Te Enamores</i>	<i>Telenovela</i>	Dramedy	2	01/21/2014-1/03/2015	Afternoon
5	<i>Amores con Trampa</i>	<i>Telenovela</i>	Romance	126	08/14/2014-cont.	Prime time
6	<i>Amor Secreto</i>	<i>Telenovela</i>	Drama	140	06/18/2015-cont.	Prime time
7	<i>Válgame Dios</i>	<i>Telenovela</i>	Dramedy	120	01/19/2015-06/24/2015	Afternoon
8	<i>La Rosa de Guadalupe</i>	<i>Unitario</i>	Drama	20	06/25/2013-01/18/2014	Prime time
9	<i>Confesiones del Más Allá</i>	<i>Unitario</i>	Drama	10	01/05/2015-03/16/2015	Prime time
10	<i>Por Siempre Mi Amor</i>	<i>Telenovela</i>	Drama	78	09/23/2014-04/28/2015	Afternoon

Source: Obitel Venezuela and ABG Nielsen Venezuela

Table 9 shows that dramedy, or dramatic comedy, is one of the favorite genres. This occurs in two Venezuelan productions that reached the top ten and that are reruns.

Table 10. Themes in the ten most watched titles

	Title	Dominant themes	Social themes
1	<i>Lo que la Vida Me Robó</i>	Love, revenge, family secrets.	Poverty, insecurity.
2	<i>Avenida Brasil</i>	Interest marriage and infidelity, revenge, identity change, love.	Child neglect, cultural differences, social advancement.
3	<i>Mi Corazón Es Tuyo</i>	Love, infidelity, disillusion, betrayal.	Stigmatized body practices (pole dance), emotional struggles for a conservative moral.
4	<i>Voltea pa' que Te Enamores</i>	History of various contemporary kinds of love: realistic love, impossible love, complicated love, old love about to expire, new love.	Informal economy and decent work, single mother, desire to excel, social class differences, promotion of architecture studies.

5	<i>Amores con Trampa</i>	Trap, love, family relationships and revenge.	Culture and habits of rural and urban world, inequality and social mobility, migration.
6	<i>Amor Secreto</i>	Love at work, stepmother, widowed father.	Low self-esteem, personal insecurity, job success.
7	<i>Válgame Dios</i>	Bastardy, conflicting family relationships, love, comedy, revenge.	Unwanted pregnancy, diseases.
8	<i>La Rosa de Guadalupe</i>	Love, heartbreak, faith, hope.	Domestic violence, drug addiction, prostitution.
9	<i>Confesiones del Más Allá</i>	Mythical, paranormal and religious stories.	Fear, loneliness, religion.
10	<i>Por Siempre Mi Amor</i>	Love, family problems, frauds.	Domestic abuse, public health, family unit.

Source: Obitel Venezuela

As in previous years, love, revenge and family conflicts were the dominant themes. Social themes were strongly influenced by the struggle between classes and morally accepted practices in society. However, *Confesiones del Más Allá* kept throughout the series fear and loneliness as predominant themes.

Table 11. Audience profile of the ten most watched titles: gender, age, socioeconomic status

	Title	Channel	Gender %		Socioeconomic status %			
			Women	Men	AB	C	D	E
1	<i>Lo que la Vida Me Robó</i>	Venevisión	5.83	3.46	0.64	12.21	61.78	25.37
2	<i>Avenida Brasil</i>	Televen	4.91	3.38	0.18	11.70	46.26	41.86
3	<i>Mi Corazón Es Tuyo</i>	Venevisión	5.01	3.16	0.76	13.56	62.24	23.44
4	<i>Voltea pa' que Te Enamores</i>	Venevisión	4.26	3.12	0.21	13.04	43.50	43.26
5	<i>Amores con Trampa</i>	Venevisión	4.14	2.71	0.59	13.69	57.01	28.71
6	<i>Amor Secreto</i>	Venevisión	4.15	2.51	0.27	14.26	58.43	27.03
7	<i>Válgame Dios</i>	Venevisión	3.72	2.61	0.40	15.69	50.25	33.66
8	<i>La Rosa de Guadalupe</i>	Venevisión	3.58	2.67	0.16	12.47	47.81	39.55
9	<i>Confesiones del Más Allá</i>	Televen	3.27	2.69	0.03	10.47	56.54	32.96
10	<i>Por Siempre Mi Amor</i>	Venevisión	3.37	2.41	0.35	17.21	45.44	36.99

Source: AGB Nielsen Venezuela

Titles		Channel	Age group %							
			4/7	8/11	12/17	18/24	25/34	35/44	45/54	55+
1	<i>Lo que la Vida Me Robó</i>	Venevisión	3.33	5.16	10.20	12.39	11.76	16.08	16.11	24.97
2	<i>Avenida Brasil</i>	Televen	4.23	4.56	8.69	11.90	10.09	15.62	18.37	24.54
3	<i>Mi Corazón Es Tuyo</i>	Venevisión	3.25	5.02	12.30	11.13	11.83	16.09	15.18	15.18
4	<i>Voltea pa' que Te Enamores</i>	Venevisión	3.87	7.71	9.26	11.12	11.51	18.33	15.42	28.78
5	<i>Amores con Trampa</i>	Venevisión	2.85	3.62	11.09	10.43	11.38	13.76	17.65	29.23
6	<i>Amor Secreto</i>	Venevisión	2.28	3.34	11.80	11.73	12.09	12.61	16.48	29.68
7	<i>Válgame Dios</i>	Venevisión	3.54	4.90	11.02	10.44	12.01	15.93	16.23	25.92
8	<i>La Rosa de Guadalupe</i>	Venevisión	4.22	6.88	10.56	10.73	12.89	17.27	18.42	19.03
9	<i>Confesiones del Más Allá</i>	Televen	5.09	4.35	9.77	12.95	8.33	14.84	18.73	25.93
10	<i>Por Siempre Mi Amor</i>	Venevisión	3.37	5.96	11.50	10.29	12.05	16.67	15.55	24.61

Source: AGB Nielsen Venezuela

During 2015, television fiction in Venezuela had a largely female audience, focused on socioeconomic status E and in the age group above 55 years old, maintaining the same pattern of the previous years. It is presumed that this behavior is because most viewers are housewives or retired women who have more time in their homes and can watch television programming regularly.

Telenovelas are maintained as the most watched fiction format in Venezuelan TV. These are mostly watched by female viewers with socioeconomic status E and older than 55. The age group 4-11 maintains the lowest percentages in relation to the rest of the results.

3. Transmedia reception

In 2015, private broadcasters Canal I, Televen and TVes changed their screen image. These changes were reflected in the freshening of their websites. On the other hand, the website of La Tele disappeared from the cloud and the channel did the same with its radio spectrum. But another TV channel arrived: TVepaco, which is transmitted by the same signal of La Tele. TVepaco's website¹⁰ stands out for its extreme simplicity, where we can only see its live signal and the timeline of its Twitter account. Moreover, before the new legislative changes, a new web channel emerged: Asamblea Nacional Televisión, responsible for broadcasting parliamentary sessions, which can be seen in a page of Venezuelan Parliament's official website¹¹ and on its YouTube channel.¹²

In spite of this scenario of modifications, transmedia strategies linked to television fiction in Venezuela have a constant particularity in 2015: the interaction with the audience and its participation in television content has been relegated only to comments through Facebook and Twitter, the most popular social networks in Venezuela. However, in information and opinion programs, viewers had more interaction manifested in the possibility of asking questions to interviewees in the studio. We see that, for one more year, regarding fiction, Venezuelan stations bet only in the presence in social networks, which promoted their contents and showed "behind the scenes" or "curious information" related to the productions and actors.

In Venezuela, national *telenovelas* have their own accounts on the most popular social networks or, in the television channels' accounts, they massively promote the release and advancement on screen of local productions. This trend draws our attention because, in 2015, a Venezuelan production, *DeMente*, was almost unnoticed on the social network accounts of Venevisión, channel that issued it

¹⁰ Available at: <http://tvepaco.com.ve/>.

¹¹ Available at: <http://www.asambleanacional.gob.ve/ANTV>.

¹² Available at: https://www.youtube.com/channel/UCbSDz7_rVKXjZ9fRON16apQ.

and has significant number of subscribers and followers.¹³ The controversial story, based on best seller *Sangre en el Diván*, written by Venezuelan journalist Ibéyise Pacheco, went from being a real case based on the story of a famous psychiatrist linked to Venezuelan political power and accused of murder to a book, and then to a digital book, reaching the theater and the television, but it had no impact in the transmedia reception. The multimedia story, except for the availability of the complete chapters of the *telenovela* on YouTube, did not succeed on social networks, which represent the main transmedia bet in Venezuela. During the period when it was on air (from June 16th to August 14th), the following number of posts on the channel's social network accounts were registered: five on Twitter (four to announce its release, on June 15th and 16th, and one to promote its second chapter), one on Facebook (on June 15th, to announce its release) and three on Instagram (two images to promote its release and the release of other productions, and to announce that on that day the work would be released, but in restricted time). *DeMente* was a Venezuelan-American co-production based on a history of national recognition, which did not stir up social networks of the country as others have done so; besides, the audience could no longer influence the plot (a form of transmediation) because the recordings had been completed during its transmission. It could have been different, but the television station did not encourage it, as the Venezuelan media usually do in the world 2.0. Neither Ibéyise Pacheco, author of the original story, seemed to be motivated: she wrote about the *telenovela* only three times on her Twitter account (@ibepacheco). The audience data of this fiction, which was transmitted with censorship at night, may also explain this phenomenon.

In contrast to *DeMente*, a national production did have a totally different treatment on social networks: *Amor Secreto*, from Venevisión. Besides being widely spread by Venevisión's social network accounts (since its premiere, on June 15th, a day after *DeMente*,

¹³ At the time of writing this analysis, the channel's Facebook account had 259.000 subscribers, Twitter had 2.5 million followers and Instagram had 378,000.

until December 31st: 21 posts on Facebook, 67 on Twitter and 30 on Instagram, with texts, photos and videos), it had a fan page on Facebook, called *Amor Secreto*, a Twitter account, @AmorSecretoVV, and an Instagram profile, @amorsecretovv; the three accounts were created and managed by the same TV channel. On Facebook, *Amor Secreto* reached 40,000 subscriptions; on Twitter, 13,000 followers; and on Instagram, 87,000. Also, on the channel's website, a page with the fiction title allowed visitors to see the summary of the chapters, backstage material (photos and videos), bloopers and interviews with the actors and the characters. Venevisión also transmitted the *telenovela* using the hashtag #AmorSecreto, inviting the audience to participate on Twitter with the tag and to express their opinion about the characters and the plot in general. It is what the channel always does with its own production, even if it is based on an original idea of a foreigner, as the case of *Amor Secreto*, which is inspired on a story created by Cuban Delia Fiallo.

These two examples prove that transmediation in Venezuelan fiction is limited to the audience participation, as stated in the social network accounts of *Amor Secreto* and other national productions. The audience remains passive, does not create or change anything in the frames. In addition, in the country, the media encourage such participation in greater extent with own productions, as can be seen in the promotions on their social networks. Following the same case, it is what Venevisión does with foreign productions, as *DeMente* (despite being based on a Venezuelan book and on a true story known by Venezuelan people), *Amores con Trampa* and *Lo que la Vida Me Robó*. Also, it is important to mention that two foreign fictions were released by this channel in the same month. This is striking, since foreign productions make up most part of the programming grid and lead the lists of television audience in Venezuela.

4. Highlights of the year

There are five aspects that are worth highlighting in relation to Venezuelan television universe in 2015. First is that Radio Caracas

Televisión – channel whose concession was withdrawn by Venezuelan state in 2007 – presently works as a production house and content distributor internationally, since, due to various legal and political decisions, it cannot transmit content through broadcast or subscription television. During 2015, this broadcast house, named now RCTV Producciones, performed *Piel Salvaje*, a Martín Hahn adaptation made of the popular *telenovela* of Julio César Mármol, *La Fiera*, released in 1978 and broadcast as *Pura Sangre* in 1994. Comprising 120 episodes, *Piel Salvaje* tends to boost fiction production in Venezuelan context, since it generated 260 direct jobs in the country. The *telenovela* was broadcast in Ecuador by TC Televisión and in South Africa by Eva, the subscription channel specialized in Latin American *telenovelas*, operated by AMC Networks International.

Second, we observe the emergence of a new television channel that comes to reinforce media service to the government. Thus, on August 31st, 2015, La Tele, one of the channels that broadcast fiction in Venezuela, ceased operations. This TV channel began broadcasting in 2002, replacing Marte Televisión. The position of La Tele was taken by TVepaco, subsidiary channel of Trust Mediático Group. This group is composed by Vepaco advertising company, which has been operating in the country since 1926, Patriacell, Valbuena & Makarem Lawyers and Consultants, AA Media Creative and North American Opinion Research. This last company has obvious connections with Venezuelan government, even reaching to the point of presenting opinion polls in which results always favored the government. Although this new television station appears as a private channel, it has strong government traits. An evidence of it is the inclusion in the grid of the following shows: *En Contacto con Maduro*, *Con Cilia en Familia* and *Con el Mazo Dando*. The first one, produced by Venezolana de Televisión (VTV) and transmitted on a weekly basis, tries to emulate *Aló Presidente*, a program in which Hugo Chávez exerted his leadership. *Con Cilia en Familia*, also produced by VTV and premiered in May, is a dominical show

whose host is the wife of the President and also congresswoman of the official party, Cilia Flores, defined by the governmental rhetoric as the “first combatant”. *Con el Mazo Dando*, again produced by VTV, is hosted by former President of the National Assembly (Congress) and former Captain of the Army Diosdado Cabello. It is a gossip show in which stories are created in favor of the government and, at the same time, there are attempts at nullifying and discrediting opposition leaders.

In third place, once again, are the negative opinions of President Maduro about television content. During the year 2015, Nicolás Maduro reaffirmed his views in regards to private television in the country, which, according to him, airs superficial and negative content. This political line is destined to implement the proposals defined during the year 2014 to be executed by the Promotional Committee of the New Venezuelan Television with the intent of promoting peace and coexistence. According to the President, the new television will only be possible through the creation of contents under the form of Independent National Production (PNI, in Spanish). It is from there that Colectivo La Moviola is created as part of the Socialist Movement of Independent National Producers. These are self-defined allies of the state, ready to be part of the so-called communicational revolution from the educative revolution. From that collective, it is considered that, with the participation of national and foreign talents, they will be able to develop *telenovelas* and micros that may stand against the violence of the television. This shall be done, despite one of its main members is José Rafael Melo, who worked as scriptwriter of *Archivo Criminal*, produced in alliance with RCTV, a sensationalist criminal program that shined for broadcasting the most renowned crimes, in which violence was not subtle or short. Even with noble intentions, the programming created by the PNIs is far from generating fiction content that may sustain the Venezuelan TV grid. During the year 2015, only one production generated by this figure was broadcast, called *Guerreras y Centauros*. *Vivir para Amar* was a *telenovela* produced by TVes

and, as such, it has to be classified as an institutional production, not as a PNI.

In fourth place, the absence of a public broadcasting service is remarkable. The promise upon which TVes came, to become a public television service, was never honored. According to Antonio Pasquali, a public broadcasting service has to fulfill principles of formal-ideal and specific-concrete character. Among the formal-ideal principles are: universality (provision of services to all the citizens without distinction); continuity (uninterrupted service, making blackouts impossible); versatility (programming crafted for a differentiated audience); adaptation (proper technology to provide an adequate service). Amongst the specific-concrete principles are: the adequate and sufficient funding; the separation from any partisan or political interest; and the autonomy in its administration and direction. Shamefully, it is a criterion that TVes does not fulfill. The current director of the station, Winston Vallenilla, is well known for expressing the phrase “Commander, I am Chávez and I am committed to the process”, expressing his commitment to the Bolivarian Revolution. It can be observed that, eight years after its creation, TVes has 70% of its programming of national origin based on the formats of information and entertainment, with sports as a flag; national fiction is barely produced. Lately, TVes has tried to emulate the structure and look like commercial channels as Venevisión and Televen. Even further, some of the contents produced and broadcast by the station have been criticized for their sexist character, the inclusion of gossip talk shows, as *El Batacazo*, based on stories from the national jet-set, and its proposed impulse of beauty contests and sex-based competition shows.

Finally, on fifth place, we highlight the content generated by ConCiencia TV (TDA), a thematic channel dedicated to the diffusion of science, technology and innovation. This is a network that seeks to offer contents with a high definition audiovisual level, based on innovative programming strategies that can become a catalyzer for a critic-based formation, showing the power of the Venezuelan

and Latin American creativity (ConCiencia 2016). So, even when it has no link to fiction programming, there is a clear effort to generate quality contents, whose priority is the audience, not promoting the governmental communicational platform.

5. Theme of the year: (re)invention of TV fiction genres and formats

The selected product is *Voltea pa' que Te Enamores*, a Venevisión production intended for all audiences that was in the top ten list of 2007, during its first broadcast from September 18th, 2006 to September 4th, 2007. With more than 267 episodes, at first, it was aired at night (10 p.m.) until April 26th, when it was moved to prime time (9 p.m.). In this new time slot, it reached 48.5% of share. After that, *Voltea pa' que Te Enamores* was broadcast again by Venevisión Plus, in 2011, at prime time and, in 2014-2015, in the evening. Likewise, during 2014 and the beginning of 2015, a remake was produced under the alliance of Venevisión International Productions, Univision Studios and Carlos Sotomayor, distributed by Cisneros Media Distribution. This new version, with María Elena Dávila and Pedro Moreno playing the leading roles, premiered in Ecuador on November 14th, 2014, based on 123 episodes of 45 minutes each.

In relation to the format and the syntactic conditions, *Voltea pa' que Te Enamores* is considered a daily broadcast *telenovela*. Built under a hybrid scheme, its structure is developed through small intrigues or conflicts that are solved on an episode-basis after being announced to the viewers at the beginning. For example: “He didn’t forgot that he forgot you, but he didn’t believe you at all” (episode 185); “Now, what can I do to see him? What if he left to the slum?” (episode 186). This happens even when the arc of the story – which is much longer – gets resolved episode after episode. From that point, we can call it a traditional structure since we cannot see any innovative element on this point. In regards to narrative strategies and the topics, we can use the words of Verónica Fuenmayor (2016), who describes *Voltea pa' que Te Enamores* as

a drama through which the story of several women is told, each living every day in a very different way in relation to each other. Yet, even when they add to the story that we are all different from each other, they also express that there may be points in common, being one of them the love, which cannot be missing from any *telenovela*. The main storyline of the opera spins around the almost “impossible” love between Dileidy Lopez, a lower class young woman, and Luis Fernando García, a middle class young architect. Yet, it is the microstories or small intrigues that give sense to the whole argument (Fuenmayor, 2016:97-98).

Even when the love story is the guiding line, there are other elements that also make part of the story, giving life to its female characters. On the same line, and in relation to the social class, some cases of dissatisfaction for belonging to a lower social class are shown, expressed in part by the desire of some female characters of overcoming this condition by their professionalization to “get out of poverty” and, on other part, the shame of belonging to this social class – which is the case of Dileidy or the concerns of La Nena Cifuentes, an upper middle class woman who is bankrupt for sustaining the image of her former social status. Yet, the desire to climb the social ladder is not the only incentive for women to study and professionalize, since their will to become independent and overcome themselves intellectually is also a motivation (as in the case of Felicita). One element that exposes an attempt to change the traditional conception of the gender roles is evident with the participation of female characters on professional labors that not long ago were linked to masculinity, for example, engineering and the street selling of newspapers. Even when this does not mean the resolution of gender conflicts that exist in our society, it is a timid effort to present diverse types of feminism, although in a much smaller

scale than in the case of men, which continue to display their roles and characteristics on patriarchal cultures, except for the case of Santiaguito.

The plot develops equitably in two spaces: the public and the private. In the first, they are on the academic space (the university where Dileidy studies); the workplace, on the street where she works as a newspaper peddler; the company, where Luis Fernando García has a prominent role as an architect. In that company converge most of the characters as well as infrastructure projects developed by the company. Another public space is the grocery, a neighborhood store where Gabito and La Gladis live their platonic love story, but also where the values of coexistence and solidarity among neighbors are shown. The intimate space is represented by homes of female characters who live the incidence of different subplots. These characters, although presented as multidimensional people that evolve insofar as the plot progresses and are shown as transgressors in some very specific cases, like La Gladis and Matilde, generally remain within stereotype genders, like the poor young woman who aspires to find the love of her life, which is represented by the gallant, a professional upper middle class man. However, we can find areas where traditional stereotypes are not marked as in the case of Dileidy's corporeality. She is a young woman who has the most common female body patterns in *telenovelas*: blonde, tall, thin, with prominent breasts and buttocks and that, despite this, has very white skin and straight hair. In turn, it is observed that the social structure is shown by: the couple, with their conflicts and difficulties; the family; the village, that is shown in the life of the neighborhood in which Dileidy and her family live and the community where the rest of the characters live; and, finally, the city, which is the privileged setting in the plot.

Regarding to the expectations aroused by the program in terms of dramatic facts and how the characters solve it, we see that, although there is a satirical and parodic component, almost all actions have the melodramatic component in which the emotionality is at risk. But the fact that humor is a kind of fine line that crosses the

whole story may be considered as an innovation in Venezuelan fiction. This element is tested by authors like Martín Hahn, Leonardo Padrón and Mónica Montañez, author of *Voltea pa' que Te Enamores*. About stylistic conditions, we see the nonexistence of a particular esthetic that we consider an innovation, although every thing in the plot seeks to show the city from the image, the design and the sound. However, there is an effort to work outdoors, although most of the scenes take place in the studio and try to use scenic resources (atmosphere, props and lighting) so that it is located in the naturalistic realism.

Concerning the production entity and industrial dynamics, *Voltea pa' que Te Enamores* is one of the products that has provided more economic benefits to Venevisión, the leading producer and broadcaster of *telenovelas* in the country. The economic benefits came not just for more than 30 retransmissions in different countries but for the remake done with the same name. This number was surpassed only by productions like *Kassandra* (1993) and *Mi Gorda Bella* (2003), both by Radio Caracas Televisión. Since 1961, when Venevisión produced and transmitted its first *telenovela*, *La Cruz del Diablo*, until 2015, this channel has made 246 *telenovelas* and 13 youth series.

Mónica Montañez, the author of *Voltea pa' que Te Enamores*, is not only a scriptwriter but also serves as story writer and playwright. Among her most famous texts are: *Mi Vida con Sharon o ¿Qué Te Pasa a Ti?* (cinema, 2006); *El Aplauso va por Dentro* (theater, 1996); *Bella No, Bellísima* (theater, 2006); *La Víctima Perfecta* (novel, 2013); *Harina de Otro Costal* (*telenovela*, 2010); *¿Vieja Yo?* (*telenovela*, 2008); and *Válgame Dios* (*telenovela*, 2012). This author has stood out for including in her plots social issues such as gender violence and love in middle age with a protagonist who exceeds 50 years and approaches life with effrontery.

The business model or form of financial sustainability of the production house is handled through a new consortium called Cisneros Media, which brings together Venevisión, Venevisión Plus,

RedMas and Miss Venezuela, deployed in the broadcast and cable television as well as in the digital world. These companies belong to one of the most powerful economic groups in Latin America, the Cisneros Group, which comprises various media, audiovisual content production, content distribution, entertainment, telephony, digital media, real estate investments, tourism development, sports teams and certain consumer products. Venevisión is currently the leader of the Venezuelan market in terms of fiction content production, followed closely by Televen, RCTV International and RCTV Mundo. The innovative element is in the fact that the same consortium is responsible for generating alliances to produce and distribute new content arising from the remake, as a strategy to penetrate new markets, such as the Latino audiences in North America.

The content circulation is guaranteed by Venevisión through two marketing strategies: pre-selling titles in pre-production – as is the case of the title that will be broadcast in July 2016, *Entre Tu Amor y Mi Amor* – and the sale of products through what is known as Legends Package, in which various flagship titles are included.

We also see that the Venevisión's broadcasting strategy is clear: if the broadcast product is successful, it is shown at prime time, which in Venezuela is from 7 p.m. to 10 p.m. *Voltea pa' que Te Enamores*, a successful *telenovela*, was broadcast in the afternoon, from 1 p.m. to 2 p.m., from Monday to Friday, between 01/14/2014 and 12/01/2015. At the end of this *telenovela*, the channel aired *Válgame Dios*, another rerun, on the same schedule. Within its programming grid, Venevisión broadcasts from noon to 1 p.m. *El Noticiero* and then begins the afternoon dramatic block, ranging from 1 p.m. until 3 p.m., followed by the child block. This channel airs, at 3 p.m., fiction series aimed at young audiences (*El Chavo*) and, at 4 p.m., *Atómico*, a variety show in which series fragments are included. The dramatic block continues at 10 p.m., when the last news broadcast is aired and then again a dramatic block, ranging from 11 p.m. to 1 a.m. in most cases. Major networks, such as Televen and TVes, broadcast from 1 p.m. to 2 p.m. *telenovela La Mujer del*

Vendaval, while TVes broadcast *Una Familia con Suerte*, both premieres.

Although this is a company that has a key location in the Venezuelan market, consolidated throughout its history, strategies aimed at increasing innovation, quality and modernity are timid and can be considered proposals of the screenwriters and playwrights rather than a consortium strategy to stay in the market. So Martin Hahn has innovated the genre by introducing suspense and humor in a plot that unfolds with hints of thriller (*Angélica Pecado*, 2000; *La Mujer de Judas*, 2002; *La Viuda Joven*, 2011). Leonardo Padrón strives to introduce into the content glances seeking to sensitize audiences on various social issues through a language that explores metaphors (*El País de las Mujeres*, 1999; *Ciudad Bendita*, 2007; *La Mujer Perfecta*, 2011) and Mónica Montañez she works with class identities and introduces a gender perspective. However, Cisneros Media has explored other themes through series as *DeMente Criminal*, *Ruta 35* and *La Válvula de Escape*.

The innovations of genre as a result of studying consumer behavior and interaction are very few. *Voltea pa' que Te Enamores* was basically distributed through the open signal and basic cable. Almost all of its chapters are offered through YouTube, some episodes are in the virtual community Viki.com, on the websites *tvdevenezuela.com* and *fulltv.com.ar*. Some productions are on *SNT.com.py*, the Paraguayan channel's, and on *DailyMotion.com*, *videomix.cz*, *vplay.pk* and *bigcinematv.com* (where it appears under the title *Ты влюбился*). The 2015 emission of *Voltea pa' que Te Enamores* has its fan page on Facebook¹⁴ and on the channel's official website. There are not possibilities of interaction with the audience. Finally, the impact of the global market and regional flow is shown through the remake done by consortium Cisneros Media in Miami, during 2014 and part of 2015, under the co-production strategy, with Ven-

¹⁴ Available at <https://www.facebook.com/NovelasVenevision/timeline>.

ezuelan, Cuban-American, Cuban, Mexican, Spanish, Colombian and American cast.

In short, the reinvention of genres and formats are shown on three fundamental aspects: the inclusion of characters that increasingly point to the complexity and multidimensionality; the inclusion of social issues in which sensitive femininities are presented with special care (breast cancer, domestic violence, eating disorders, etc.); and format hybridization through the inclusion of thriller as format.

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TOP TEN TV FICTION IN OBITEL COUNTRIES

ARGENTINA

1. *Esperanza Mía*

Production: Pol-ka

Direction: Sebastián Pivotto, Lucas Gil

Script: Marta Betoldi

Cast: Lali Espósito, Mariano Martínez, Gabriela Toscano, Federico D'Elia, Tomas Fonzi

2. *Rastros de Mentiras*

Production: Globo

Direction: Marcelo Travesso, Marco Rodrigo, André Felipe Binder, André Barros

Script: Walcyr Carrasco; collaborators: Daisy Chaves, Eliane Garcia, Daniel Berlinsky, Marcio Haiduck

Cast: Paolla Oliveira, Malvino Salvador, Mateus Solano, Vanessa Giácomo, Juliano Cazarré

3. *Niños Robados*

Production: Telecinco Cinema

Direction: Salvador Calvo

Script: Helena Medina

Cast: Nadia de Santiago, Pepa Anierte, Macarena García, Manuela Paso, Blanca Portillo

4. *Historia de un Clan*

Production: Underground Contenidos

Direction: Luis Ortega

Script: Luis Ortega, Javier Van de

Couter, Pablo Ramos

Cast: Alejandro Awada, Ricardo "Chino" Darín, Cecilia Roth, Nazareno Casero, María Soldi

5. *Viudas e Hijos del Rock & Roll*

Production: Underground Contenidos, Telefe, Endemol

Direction: Miguel Colom, Mariano Ardanaz, Javier Pérez, Diego Sánchez

Script: Ernesto Korovsky, Silvina Frejdkes, Alejandro Quesada

Cast: Damián Desanto, Paola Barrientos, Celeste Cid, Julieta Ortega, Juan Minujin

6. *Signos*

Production: Pol-ka, Turner Broadcasting System

Direction: Daniel Barone

Script: Leandro Calderone, Carolina Aguirre

Cast: Julio Chávez, Claudia Fontán, Alberto Ajaka, Leonor Manzo, Pilar Gamboa

7. *Noche & Día*

Production: Pol-ka

Direction: Rodolfo Antúnez, Jorge Nisco

Script: Marcos Osorio Vidal, Willy Van Broeck

Cast: Facundo Arana, Romina

Gaetani, Gabriel Corrado, Eleonora Wexler, Florencia Raggi

8. *Guapas*

Production: Pol-ka

Direction: Daniel Barone, Lucas Gil

Script: Leandro Calderone, Carolina Aguirre

Cast: Mercedes Morán, Carla Peterson, Florencia Bertotti, Isabel Macedo, Araceli González

9. *Amores Robados*

Production: Globo

Direction: José Luiz Villamarim

Script: George Moura

Cast: Cauã Reymond, Ísis Valverde, Murilo Benício, Patrícia Pillar, Dira Paes, Cássia Kis

10. *Entre Caníbales*

Production: Telefe, 100 Bares, Monte Carlo Televisión, Fox Life

Direction: Miguel Colom, Pablo Vásquez, Diego Sánchez

Script: Juan José Campanella, Gustavo Belatti, Emanuel Diez

Cast: Natalia Oreiro, Benjamín Vicuña, Joaquín Furriel, Natalia Lobo, Gabriel Gallichio

BRAZIL

1. *Império*

Production: Globo

Direction: Rogério Gomes, Pedro Vasconcelos, André Felipe Binder

Script: Aguinaldo Silva

Cast: Alexandre Nero, Lília Cabral, Caio Blat, Leandra Leal, José Mayer

2. *A Regra do Jogo*

Production: Globo

Direction: Amora Mautner, Joana Jabace, Paulo Silvestrini

Script: João Emanuel Carneiro

Cast: Alexandre Nero, Giovanna Antonelli, Vanessa Giácomo, Tony Ramos, José de Abreu

3. *Babilônia*

Production: Globo

Direction: Dennis Carvalho, Maria de Médicis

Script: Gilberto Braga, Ricardo Linhares, João Ximenez Braga

Cast: Glória Pires, Adriana Esteves, Camila Pitanga, Thiago Fragoso, Marcos Palmeira

4. *Alto Astral*

Production: Globo

Direction: Jorge Fernando, Fred Mayrink

Script: Daniel Ortiz

Cast: Cláudia Raia, Thiago Lacerda, Nathália Dill, Sérgio Guizé, Christiane Torloni

5. *Totalmente Demais*

Production: Globo

Direction: Luiz Henrique Rios
Script: Rosane Svartman, Paulo Halm

Cast: Marina Ruy Barbosa, Fábio Assunção, Juliana Paes, Felipe Simas, Humberto Martins

6. *I Love Paraisópolis*

Production: Globo

Direction: Wolf Maya, Carlos Araújo

Script: Alcides Nogueira, Mário Teixeira

Cast: Bruna Marquezine, Maurício Destri, Caio Castro, Letícia Spiller, Tatá Werneck

7. *Tim Maia – Vale o que Vier*

Production: Globo, RT Features

Direction: Mauro Lima, Luis Felipe Sá

Script: Mauro Lima, Antônia Pellegrino, Patrícia Andrade

Cast: Babu Santana, Robson Nunes, Cauã Reymond, Alinne Moraes, Luis Lobianco

8. *Ó Paí, Ó – Luz, Câmera 50 Anos*

Production: Globo

Direction: Monique Gardenberg

Script: Guel Arraes, Jorge Furtado, Mauro Lima, Monique Gardenberg

Cast: Lázaro Ramos, Matheus Nachtergaele, Aline Nopomuceno, Tânia Toko, Luciana Souza

9. *O Canto da Sereia – Luz, Câmera 50 Anos*

Production: Globo

Direction: Ricardo Waddington, José Luiz Villamarim

Script: George Moura, Patrícia Andrade, Sérgio Goldenberg

Cast: Ísis Valverde, Gabriel Braga Nunes, Camila Morgado, Marcos Palmeira, Marcos Caruso

10. *Além do Tempo*

Production: Globo

Direction: Rogério Gomes, Pedro Vasconcelos

Script: Elizabeth Jhin

Cast: Alinne Moraes, Rafael Cardoso, Paolla Oliveira, Irene Ravache, Ana Beatriz Nogueira

CHILE

1. *Pituca sin Lucas*

Production: Mega (Patricio López)

Direction: Patricio González, Pablo Aedo, Felipe Arratia, Mauricio Lucero

Script: Rodrigo Bastidas, Elena Muñoz, Alejandra Saavedra, Hugo Castillo

Milena Bastidas

Cast: Paola Volpato, Álvaro Rudolphy, Ingrid Cruz, Mauricio Pesutic, Mariana Di Girólamo

2. *Papá a la Deriva*

Production: Mega

Direction: Felipe Arratia, Mauricio Lucero

Script: Daniella Castagno, Alejandro Bruna, Paula Parra, Felipe Contreras, Raúl Gutiérrez

Cast: Maria Gracia Omegna, Gonzalo Valenzuela, Francisca Imboden, Ignacio Achurra, Fernando Larraín

3. *Celia*

Production: Fox Telecolombia

Direction: Víctor Mallarino

Script: Andrés Salgado and team

Cast: Jeimy Osorio, Aymee Nuviola, Modesto Lacen, Willie Denton, Abel Rodríguez

4. *El Bosque de Karadima*

Production: Ocio

Direction: Matías Lira

Script: Elisa Eliash, Alicia Scherson, Álvaro Díaz
Cast: Benjamín Vicuña, Pedro Campos, Luis Gnecco, Ingrid Isensee, Marcial Tagle

5. *Eres mi Tesoro*

Production: AGTV, Mega
Direction: Nicolás Alemparte, Manuel Buch
Script: Yusef Rumie, Pablo Riquelme, Francisco Bobadilla, Luis Ponce, Rosario Valenzuela, Isabel Budinish
Cast: María José Bello, Álvaro Morales, Viviana Rodríguez, Felipe Contreras, César Caillet

6. *La Chúcará*

Production: DDRío, TVN
Direction: Matías Stagnaro
Script: Julio Rojas, Valeria Hoffman, Sandra Arriagada, Jaime Morales, Francisco Arriagada, Natalia Luque, Carlos Oporto
Cast: Antonia Santa María, Felipe Braun, Bárbara Ruiz Tagle, Eduardo Paxeco, Josefina Velasco

7. *Familia Moderna*

Production: Mega
Direction: Diego Rougier
Script: Rodrigo Gijón, Francisco Bobadilla
Cast: Patricio Contreras, Álvaro Escobar, Mariana Loyola, Nicolás Saavedra, Mario Soto

8. *Rastros de Mentiras*

Production: Globo
Direction: Wolf Maya

Script: Walcyr Carrasco
Cast: Paolla Oliveira, Malvino Salvador, Mateus Solano, Susana Vieira, Antonio Fagundes

9. *Chipe Libre*

Production: Canal 13
Direction: Herval Abreu
Script: Carla Stagno, José Fonseca, Pablo Toro, Anneke Munita
Cast: Fernanda Urrejola, Nicolás Poblete, Juanita Ringeling, Mario Horton, Loreto Aravena

10. *Lo que Callamos las Mujeres*

Production: Ojos Claros Films, CHV
Direction: variable
Script: variable
Cast: variable

COLOMBIA

1. *Diomedes, el Cacique de la Junta*

Production: RCN Televisión
Direction: Herney Luna
Script: Fernán Rivera, Sandra Gaitán, Juan Carlos Troncoso, Pedro Hernández
Cast: Orlando Liñan, Kimberly Reyes, Victor Hugo Trespalacios, Alejandra Azcárate

2. *Lady, la Vendedora de Rosas*

Production: RCN Televisión
Direction: Israel Sánchez, Juan Felipe Cano
Script: Lina Arboleda, Pedro Miguel Rozo, Juliana Lema
Cast: Natalia Reyes, Michell Orozco, Ernesto Benjumea, Juan Pablo Barragan

3. *Las Hermanitas Calle*

Production: Caracol Televisión

Direction: Luis Alberto Restrepo, Juan Carlos Vásquez, Jorge Sandoval

Script: César Betancurt

Cast: Yury Vargas, Carolina Gaitán, Juan Pablo Urrego, Gill González Hoyos

4. *Sala de Urgencias*

Production: Resonant TV, RCN Televisión

Direction: William Barragán, Rodrigo Triana

Script: Jörg Hiller

Cast: Rafael Novoa, Paola Rey, Cristina Umaña, Carlos Torres, Rubén Zamora

5. *Celia*

Production: Fox Telecolombia, RCN Televisión

Direction: Víctor Mallarino, Liliana Bocanegra

Script: Andrés Salgado, Paul Rodríguez

Cast: Jeimy Osorio, Aymee Nuviola, Willie Denton, Modesto Lacen

6. *Laura, la Santa Colombiana*

Production: Caracol Televisión

Direction: Juan Camilo Pinzón

Script: Ana María Parra

Cast: Julieth Restrepo, Linda Lucía Callejas

7. *El Laberinto de Alicia*

Production: Vista Producciones, RCN Televisión

Direction: Felipe Cano

Script: Tania Cárdenas, Santiago Ardila

Cast: Marcela Carvajal, Patrick Delmas, Juan Pablo Shuk, César Mora, Patricia Castañeda

8. *La Viuda Negra*

Production: RTI Producciones, Caracol Televisión

Direction: Alejandro Lozano, William González Zafra, Carlos Cock

Script: Gustavo Bolívar, Yesmer Uribe

Cast: Ana Serradilla, Julián Román, Katherine Porto, Ramiro Meneses, Juan Pablo Gamboa

9. *Niche*

Production: Caracol Televisión

Direction: Luis Orjuela Cortés, Anselmo Calvo Villamizar

Script: Arlet Castillo

Cast: Jair Romero, Abril Schreiber, Helga Díaz, Luis Fernando Salas, Fernando Solórzano

10. *Tiro de Gracia*

Production: Caracol Televisión, Televisa

Direction: Andrés Marroquín, Unai Amuchastegui

Script: Jörg Hiller

Cast: Robinson Díaz, Nicolás Montero, Indhira Serrano, Natalia Durán

ECUADOR

1. *Rastros de Mentiras*

Production: Globo

Direction: Mauro Mendonça Filho

Script: Walcyr Carrasco

Cast: Mateus Solano, Antonio Fagundes, Susana Vieira, Paolla Oliveira, Malvino Salvador

2. *La Guerrera*

Production: Globo

Direction: Marcos Schechtman, Fred Mayrink

Script: Gloria Pérez

Cast: Nanda Costa, Rodrigo Lombardi, Giovanna Antonelli, Claudia Raia, Totia Meirelles

3. *En Otra Piel*

Production: Telemundo

Direction: Julio Jiménez

Script: Laura Sosa, Eduardo Macías

Cast: María Elisa Camargo, Laura Flores, David Chocarro, Jorge Luis Pila

4. *Los Hijos de Don Juan*

Production: TC Televisión, Ana Franco, Ruth Coello

Direction: Manuel Arias

Script: José Navarrete, Bertha Tejada, Karina Villavicencio, Ángela Chavarría, Ronald Hidalgo

Cast: Víctor Aráuz, Leonardo Moreira, Isaam Eskandar, José Urrutia

5. *La Sombra de Helena*

Production: Globo

Direction: Jayme Monjardim, Leonardo Nogueira, Teresa Lampreia, Adriano Melo, Luciano Sabino, João Boltshauser

Script: Manoel Carlos

Cast: Julia Lemmertz, Gabriel Braga Nunes, Humberto Martins, Bruna Marquezine, Erika Januza

6. *Así Pasa*

Production: Ecuavisa, Javier Campuzano, Patricia Rivera

Direction: Catrina Tala

Script: Eddie González, Alfredo Piguave, Titov Zavala

Cast: Christian Maquilón, Efraín Ruales, Claudia Campusano, Tania Salas, Vicente Romero

7. *Imperio*

Production: Globo

Direction: Rogério Gomes, Pedro Vasconcelos

Script: Márcia Prates, Nelson Nadotti, Rodrigo Ribeiro, Maurício Gyboski, Renata Dias Gomes

Cast: Alexandre Nero, Lília Cabral, Leandra Leal, Chay Suede

8. *3 Familias*

Production: Ecuavisa, Martín Calle

Direction: Lucho Aguirre

Script: Eddie González, Alfredo Piguave

Cast: Diego Spotorno, Marcela Ruete, Cristhian Maquilón, Érika Vélez, Cecilia Cascante, Martín Calle

9. *Celia*

Production: Fox Telecolombia, Nelson Martínez

Direction: Víctor Mallarino, Liliana Bocanegra

Script: Andrés Salgado, Paul Rodríguez

Cast: Jeimy Osorio, Aymée Nuviola, Modesto Lacen, Willie Denton, Abel Rodríguez

10. *La Ronca de Oro*

Production: Caracol Televisión, Clara María Ochoa, Ana Piñeres

Direction: Klych López, Liliana Bocanegra

Script: Gerardo Pinzón, Andrés Guzmán, Janneth Pacheco, Manuel Cubas, Sandra Motato

Cast: Majida Issa, Ana María Estupiñán, Diego Cadavid, Viviana Serna, Leonardo Acosta

SPAIN

1. *El Príncipe*

Production: Plano a Plano

Direction: Norberto López Amado, José Ramos Paíno, Iñaki Mercero, Javier Quintas

Script: Aitor Gabilondo, César Benítez (creators and coordinators)

Cast: José Coronado, Hiba Abouk, Álex González, Rubén Cortada, Elia Galera

2. *Allí Abajo*

Production: Plano a Plano for Atresmedia

Direction: Iñaki Mercero

Script: Aitor Gabilondo, César Benítez, Óscar Terol (creators), Óscar Terol (coordinator), Olatz Arroyo, Marta Sánchez, Natxo López (scriptwriters)

Cast: Jon Plazaola, Carmina Barrios, Mariano Peña, Ane Gabarain, Maribel Salas

3. *La que se Avecina*

Production: Contubernio, Mediaset España

Direction: Laura Caballero

Script: Alberto Caballero, Laura Caballero, Daniel Deorador (original idea), Araceli Álvarez de Sotomayor, Sergio Mitjans, Félix Sabroso

Cast: María Adán, Ricardo Arroyo, Cristina Castaño, Pablo Chiapella, José Luis Gil

4. *Los Nuestros*

Production: Multipark Ficción, Mediaset España

Direction: Salvador Calvo

Script: Alejandro Hernández (script), Juan Carlos Cueto, Rocío Martínez, Pablo Tébar, Alberto Manzano (plot)

Cast: Hugo Silva, Blanca Suárez, Antonio Velázquez, Álvaro Cervantes, Luis Fernández

5. *Mar de Plástico*

Production: Boomerang, Atresmedia

Direction: Norberto López Amado

Script: Julio de la Rosa (original idea), Rocío Martínez, Juan Carlos Cueto, Pablo Tébar, Alberto Manzano (original idea and script)

Cast: Rodolfo Sánchez, Belén López, Pedro Casablanc, Lucho Fernández, Patrick Criado

6. *Bajo Sospecha*

Production: Bambú Producciones for Atresmedia

Direction: Silvia Quer

Script: Ramón Campos, Gema R. Neira (original idea), Adolfo Valor, Eligio R. Montero, Moisés Gómez
Cast: Yon González, Blanca Romero, Lluís Homar, Alicia Borrachero, Pedro Alonso

7. *Vis a Vis*

Production: Globomedia
Direction: Jesús Colmenar
Script: Daniel Écija (creator), Álex Pina, Iván Escobar, Esther Martínez Lobato (creators and scriptwriters)
Cast: Maggie Civantos, Carlos Hipólito, Roberto Enríquez, Cristina Plazas, Berta Vázquez

8. *Velvet*

Production: Bambú Producciones
Direction: Carlos Sedes
Script: Ramón Campos, Gema R. Neira (creators and coordinators), Teresa Fernández-Valdés
Cast: Paula Echevarría, Miguel Ángel Silvestre, Aitana Sánchez-Gijón, Amaia Salamanca, Manuela Velasco

9. *Anclados*

Production: Globomedia
Direction: Mar Olid, Mario Montero, Roberto Monge, Begoña Álvarez
Script: Iñaki San Román (coordinator), Raúl Díaz, Julián Sastre, Nando Abad, Benjamín Herranz, Rodrigo Martín, Fernando Sancristóval, María Miranda, Juan Torres, Fernando Pérez, Jorge López, Paula López, Arantxa Cuesta, Tatiana Chisleanchi,

Verónica Fernández, Víctor López, Libe Ortiz, Marina Pérez, Luis Fabra
Cast: Miren Iburguren, Rossy de Palma, Joaquín Reyes, Alfonso Lara, Úrsula Corberó

10. *Cuéntame Cómo Pasó*

Production: Grupo Ganga
Direction: Agustín Crespi, Antonio Cano, Moisés Ramos, Óscar Aibar
Script: Eduardo Ladrón de Guevara, Ignacio del Moral, Jacobo Delgado, Curro Royo, Sonia Sánchez, Bárbara Alpuente
Cast: Imanol Arias, Ana Duato, Ricardo Gómez, María Galiana, Juan Echanove

UNITED STATES

1. *Mi Corazón Es Tuyo*

Production: Televisa
Direction: Jorge Fons, Lili Garza, Aurelio Ávila, Mauricio Manzano
Script: Ana García Obregón, Pablo Ferrer, Ana Obregón, Alejandro Pohlenz, Ricardo Tejada
Cast: Silvia Navarro, Jorge Salinas, Mayrín Villanueva, Pablo Montero, Carmen Salinas

2. *Hasta el Fin del Mundo*

Production: Televisa
Direction: Ricardo de la Parra, Martha Luna
Script: Enrique Estevanez, Kary Fajer
Cast: Pedro Fernández, Marjorie de Souza, María Rojas, César Évora

3. *La Malquerida*

Production: Televisa

Direction: Salvador Garcini

Script: Benavente, Ximena Suárez, Janely Lee, Alejandra Díaz, Vanesa Varela, Fernando Garcilita

Cast: Victoria Ruffo, Ariadne Díaz, Christian Meier, África Zavala, Arturo Peniche

4. *Que Te Perdona Dios, Yo No*

Production: Televisa

Direction: Manuel Barajas, Claudio Reyes Rubio

Script: Caridad Bravo Adams, Juan Carlos Alcalá, Rosa Salazar Arenas, Fermín Zuñiga, Jorge Cervantes, Rossana Ruiz

Cast: Zuria Vega, Mark Tacher, Sergio Goyri, Rebecca Jones, Sabine Moussier

5. *El Señor de los Cielos 3*

Production: Telemundo, Argos

Direction: Danny Gavidía, Walter Doehner, José Luis García Agraz, Carlos Villegas

Script: Luis Zekowicz, Mariano Calasso, Andrés López

Cast: Rafael Amaya, Carmen Villalobos, Mauricio Ochman, Fernanda Castillo, Carmen Aub

6. *Lo Imperdonable*

Production: Televisa

Direction: Mónica Miguel, Víctor Manuel Fouilloux, Alberto Díaz

Script: Caridad Bravo Adams, Ximena Suárez, Ricardo Fiagella, Janely Lee, Alejandra Díaz

Cast: Ana Brenda Contreras, Iván Sánchez, Sergio Sendel, Juan Ferrara, Claudia Ramírez

7. *La Gata*

Production: Televisa

Direction: Víctor Manuel Fouilloux, Víctor Rodríguez

Script: Inés Rodena, Carlos Romero, María Antonieta Calú Gutiérrez, Tere Medina, Dolores Ortega

Cast: Maite Perroni, Daniel Arenas, Laura Zapata, Erika Buenfil, Manuel Ojeda

8. *Amores con Trampa*

Production: Televisa

Direction: Salvador Garcini, César González,

Script: Carlos Oporto, David Bustos, María Antonieta Gutiérrez, Jaime Morales, Saúl Pérez

Cast: Itatí Cantoral, Eduardo Yáñez, Ernesto Laguardia

9. *Yo no Creo en los Hombres*

Production: Televisa

Direction: Eric Morales, Xavier Romero, Luis Vélez

Script: Caridad Bravo Adams, Aida Guajardo, Felipe Ortiz

Cast: Adriana Louvier, Gabriel Soto, Azela Robinson, Alejandro Camacho, Rosa María Bianchi

10. *Pasión y Poder*

Production: Televisa

Direction: Salvador Garcini, Alejandro Gamboa

Script: Marisa Garrido, Ximena Suárez, Janely E. Lee, Alejandra Díaz, Vanesa Valera

Cast: Jorge Salinas, Fernando

Colunga, Susana González, Marlene Favela

MEXICO

1. *Amores con Trampa*

Production: Televisa

Direction: José Cabello

Script: Emilio Larrosa

Cast: África Zavala, Itatí Cantoral, Eduardo Yáñez, Ernesto Laguardia, Harry Geithner, Nora Salinas

2. *Lo Imperdonable*

Production: Televisa

Direction: Aarón Gutiérrez

Script: Ximena Suárez

Cast: Grettell Valdez, Guillermo García Cantú, Claudia Ramírez

3. *Antes Muerta que Lichita*

Production: Televisa

Direction: Rosy Ocampo

Script: Covadonga Espeso

Cast: Maite Perroni, Arath de la Torre, Eduardo Santamarina, Ingrid Martz, Chantal Andere

4. *La Rosa de Guadalupe*

Production: Televisa

Direction: Miguel Ángel Herros

Script: Carlos Mercado

Cast: Several actors from Televisa's acting school

5. *Pasión y Poder*

Production: Televisa

Direction: José Alberto Castro

Script: Marissa Garrido

Cast: Susana González, Jorge Salinas, Fernando Colunga, Marlene Favela

6. *Como Dice el Dicho*

Production: Televisa

Direction: Genoveva Martínez

Script: José Olvera

Cast: Sergio Corona, Wendy González Michael Ronda, Brisa Carrillo

7. *A que no Me Dejas*

Production: Televisa

Direction: Hilda Santaella

Script: Eric Vonn

Cast: Camila Sodi, Osvaldo Benavides, Arturo Peniche, Alejandra Barros, Leticia Calderón

8. *Que Te Perdona Dios, Yo No*

Production: Televisa

Direction: Ignacio Alarcón

Script: Caridad Bravo

Cast: Rebecca Jones, Zuria Vega, Mark Tacher, Sergio Goyri, Sabine Moussier

9. *La Vecina*

Production: Televisa

Direction: Ángel Villaverde

Script: Lucero Suárez

Cast: Esmeralda Pimentel, Juan Diego Covarrubias, Natalia Guerrero, Javier Jattin, Luis Gatica

10. *Amor de Barrio*

Production: Televisa

Direction: Liliana Cuesta

Script: Fernanda Villeli

Cast: Renata Notni, Mane de la Parra, Ale García, Pedro Moreno, Marisol del Olmo

PERU

1. *Al Fondo Hay Sitio (7th season)*

Production: América Televisión, Efraín Aguilar

Direction: Jorge Tapia, Toño Vega

Script: Gigio Aranda

Cast: Gustavo Bueno, Sergio Galliani, Magdyel Ugaz, Andrés Wiese, Adolfo Chuiman

2. *Amor de Madre*

Production: Del Barrio Producciones, América Televisión

Direction: Francisco Álvarez

Script: Víctor Falcón, Eduardo Adrianzén

Cast: Pierina Carcelén, David Villanueva, Stefano Salvini, Tula Rodríguez, Jimena Lindo

3. *Ven Baila Quinceañera*

Production: Pro TV Producciones

Direction: Luis Barrios

Script: Guillermo Aranda, Luis Del Prado, Cinthia McKenzie, Jose Luis Varela

Cast: Flavia Laos, Alessandra Fuller, Mayra Goñi, Andrés Vilchez, Pablo Heredia

4. *Locura de Amor*

Production: Del Barrio Producciones

Direction: Francisco Álvarez

Script: Rita Solf, Michelle Alexander (original idea), Bruno Alvarad, Tito Céliz (script)

Cast: Andrea Luna, Fernando Luque, Diego Val, Daniela Camaioira, Carolina Cano

5. *Pulseras Rojas*

Production: Del Barrio Producciones

Direction: Michelle Alexander

Script: Albert Espinosa (original idea)

Cast: Stefano Salvini, Emilio Nogueroles, Valquiria Huerta, Mariano García-Rosell, Brando Gallesi

6. *Solamente Milagros (4th season)*

Production: América Televisión, César Arana Díaz

Direction: Jorge Tapia, Santiago Vitteri

Script: Luis del Prado, Rosa Gutiérrez

Cast: Juanjo Espinoza, Carolina Infante, Natalia Montoya, Fernando Pasco, Vania Accinelli

7. *La Paisana Jacinta*

Production: Jorge Benavides

Direction: Jorge Benavides

Script: Otoniel Díaz, Hugo Tasayco (scriptwriters), Jorge Benavides (original idea)

Cast: Jorge Benavides, Carlos Vilchez, Mariella Zanetti, Daysi Ontaneda

8. *Somos Family*

Production: Latina Televisión

Direction: Lucho Cáceres

Script: Lucho Cáceres, Alfonso Gálvez

Cast: Manuel Gold, Lucho Cáceres, Fernando Luque, Reynaldo Arenas, Kathy Serrano

9. *Ramírez*

Production: Imizu Internacional

Direction: Rubén Carpio

Script: Luis Felipe Alvarado,
Alonso Cueto (original idea)

Cast: Gianella Neyra, Regina Alcóver, Óscar Carrillo, Óscar Beltrán, Billy Bell Taylor, Brando Gallesi

10. *Nuestra Historia*

Production: TV Perú, Sol y Luna Producciones

Direction: Oscar Carrillo

Script: Eduardo Adrianzén

Cast: Oscar Carrillo, Hernán Romero, Sonia Seminario, Gonzalo Revoredó, Giovanni Arce

PORTUGAL

1. *Mar Salgado*

Production: SIC, SP Televisão, Globo

Direction: Patrícia Sequeira

Script: Inês Gomes

Cast: Margarida Vilanova, Ricardo Pereira, Joana Santos, José Fidalgo, Custódia Gallego

2. *Única Mulher*

Production: Plural Entertainment

Direction: António Borges Correia

Script: Maria João Mira, André Ramalho

Cast: Lourenço Ortigão, Ana Sofia Martins, Alexandra Lencastre, José Wallenstein, Rita Pereira

3. *Coração d'Ouro*

Production: SP Televisão

Direction: Sérgio Graciano

Script: Pedro Lopes

Cast: Rita Blanco, Mariana Teixeira, João Reis, Adelaide Sousa, Mariana Monteiro

4. *Jardins Proibidos*

Production: Plural Entertainment

Direction: Jorge Cardoso

Script: Manuel Arouca, José Eduardo Moniz

Cast: Vera Kolodzig, Pedro Granger, Rita Salema, Lurdes Norberto, Luís Alberto

5. *Santa Bárbara*

Production: Plural Entertainment

Direction: Hugo de Sousa

Script: Victor Carrasco, adapted by Artur Ribeiro

Cast: Benedita Pereira, Albano Jerónimo, São José Correia, Alménio Gonçalves, Susana Arrais

6. *Poderosas*

Production: SP Televisão

Direction: Hugo Xavier

Script: Patrícia Muller, Pedro Lopes

Cast: Rogério Samora, Margarida Marinho, Joana Ribeiro, Soraia Chaves, Maria João Luís

7. *Mulheres*

Production: Plural Entertainment

Direction: Jorge Queiroga

Script: Raquel Palermo, Eduardo Maia

Cast: Sofia Alves, Fernanda Serrano, Jessica Athayde, Maria Rueff, Susana Arrais

8. *Bem-Vindos a Beirais*

Production: SP Televisão

Direction: Bruno José, Manuel Rebelo

Script: Collective work

Cast: Pepê Rapazote, Oceana Basílio, Lúcia Moniz, Sandra Santos, Carla Chambel

9. *Água de Mar (telenovela)*

Production: Coral Europa

Direction: Catarina Delgado

Script: Raquel Palermo, Vera Sacramento

Cast: Leonor Andrade, Duarte Soares, Mariana Pacheco, Jorge Corrula, Mafalda Vilhena

10. *Nossos Dias*

Production: SP Televisão

Direction: Duarte Teixeira, Paulo Brito, António Figueirinha

Script: Collective work

Cast: Pedro Laginha, Anabela Teixeira, Débora Monteiro, Carla Maciel, Orlando Costa

URUGUAY

1. *Rastros de Mentiras*

Production: Globo

Direction: Marcelo Travesso, Marco Rodrigo, André Felipe Binder, André Barros

Script: Walcyr Carrasco; collaborators: Daisy Chaves, Eliane Garcia, Daniel Berlinsky, Marcio Haiduck

Cast: Paolla Oliveira, Malvino Salvador, Mateus Solano, Susana Vieira, Antonio Fagundes

2. *El Canto de la Sirena*

Production: Globo

Direction: José Luis Villamarín, Ricardo Waddington

Script: George Moura, Patrícia Andrade, Sérgio Goldenberg

Cast: Ísis Valverde, Gabriel Braga Nunes, Camila Morgado, Marcos Palmeira, Marcos Caruso

3. *Esperanza Mía*

Production: Pol-ka

Direction: Sebastián Pivotto, Lucas Gil

Script: Adrían Suar (original idea), Marta Betoldi

Cast: Mariano Martínez, Lali Espósito, Natalie Pérez, Tomás Fonzi, Ángela Torres, Federico D'Elia, Rita Cortese, Carola Reyna, Ana María Picchio

4. *Imperio*

Production: Globo

Direction: Rogério Gomes, Pedro Vasconcelos, André Felipe Binder

Script: Aguinaldo Silva; collaborators: Márcia Prates, Nelson Nadotti, Rodrigo Ribeiro, Maurício Gyboski, Renata Dias Gomes, Zé Dassilva, Megg Santos, Brunno Pires

Cast: Alexandre Nero, Lília Cabral, Caio Blat, Leandra Leal, José Mayer

5. *La Fiesta*

Production: Globo

Direction: José Luiz Villamarim, Paulo Silvestrini, Luisa Lima, Walter Carvalho

Script: George Moura, Sérgio Goldenberg; collaborators: Charles

Peixoto, Flávio Araújo, Lucas
Paraízo, Mariana Mesquita
Cast: Daniel de Oliveira, Sophie
Charlotte, Tony Ramos, Patricia
Pillar, Cássia Kiss

6. *Flor del Caribe*

Production: Globo
Direction: Leonardo Nogueira,
Jayme Monjardim
Script: Walther Negrão
Cast: Grazi Massafera, Henri Cas-
telli, Igor Rickli, Juca de Oliveira,
Sérgio Mamberti

7. *Dinosaurios y Robots*

Production: Globo
Direction: Rogério Gomes, Pedro
Vasconcelos, André Felipe Binder,
Fábio Strazzer, Marcelo Zambelli,
Roberta Richard
Script: Walcyr Carrasco, Claudia
Souto; collaborators: André Ryoki,
Daniel Berlinsky
Cast: Adriana Esteves, Marcos
Pasquim, Mateus Solano, Flávia
Alessandra

8. *Las Cariocas*

Production: Globo, Lereby
Produções
Direction: Daniel Filho, Cris
D'Amato, Amora Mautner
Script: Euclides Marinho, Adriana
Falcão, Clarice Falcão, Claudia
Tajes, Gregório Duvivier, Marcelo
Saback
Cast: Alinne Moraes, Adriana
Esteves, Paola Oliveira, Sonia
Braga, Deborah Secco

9. *Las Brasileñas*

Production: Globo, Lereby
Produções
Direction: Cris D'Amato, Tizuka
Yamasaki, Daniel Filho
Script: Jô Abdu, Márcio Alemão,
Marcos Bernstein, Carolina Castro,
Gregório Duvivier, Adriana Falcão,
Clarice Falcão, Sylvio Gonçalves,
Marcius Melhem, Ana Maria
Moretzsohn, Thalita Rebouças,
Marcelo Saback, Luis
FernandoVerissimo
Cast: Sophie Charlotte, Glória
Pires, Juliana Paes, Ísis Valverde,
Giovanna Antonelli, Juliana Alves,
Maria Flor, Cláudia Jimenez, Maria
Fernanda Cândido, Fernanda
Montenegro, Sandy Leah Lima,
Mariana Ximenes, Cléo Pires, Dira
Paes, Suyane Moreira, Patrícia
Pillar, Leandra Leal, Ivete Sangalo,
Xuxa, Alice Braga, Bruna
Linzmeier, Letícia Sabatella

10. *Guapas*

Production: Pol-ka
Direction: Daniel Barone, Lucas Gil
Script: Leandro Calderone,
Carolina Aguirre
Cast: Mercedes Morán, Carla
Peterson, Florencia Bertotti, Isabel
Macedo, Araceli González

VENEZUELA

1. *Lo que la Vida Me Robó*

Production: Televisa
Direction: Sergio Cataño, Claudio
Reyes Rubio
Script: Rosa Salazar, Fermin
Zungia

Cast: Daniela Castro, Angélique Boyer, Sebastian Rulli, Luis Roberto Guzmán, Sergio Sendel

2. *Avenida Brasil*

Production: Globo

Direction: Gustavo Fernandez, Joana Jabace, Paulo Silvestrini, Thiago Teiltelroít, André Camara

Script: João Emanuel Carneiro

Cast: Débora Falabella, Cauã Reymond, Murilo Benício, Adriana Esteves, Marcello Novaes

3. *Mi Corazón Es Tuyo*

Production: Televisa

Direction: Jorge Fons, Aurelio Ávila

Script: Ana García Obregón, Alejandro Pohlenz

Cast: Silvia Navarro, Jorge Salinas, Mayrín Villanueva, Adrián Uribe, René Casados

4. *Voltea pa' que Te Enamores*

Production: Venevisión

Direction: Claudio Callao

Script: Mauricio Barreto, Andrés Huerta

Cast: Anasol, Ricardo Vélez, Angela Vergara, Juan Pablo Shuk, María Cristina Pimiento

5. *Amores con Trampa*

Production: Televisa

Direction: Javier Yerandi, Salvador Garcini

Script: Carlos Oporto, David Bustos, Jaime Morales

Cast: Itatí Cantoral, Eduardo Yáñez, Ernesto Laguardia, África Zavala,

Nora Salinas

6. *Amor Secreto*

Production: Venevisión

Direction: Lili Garza, Mauricio Rodríguez

Script: César Sierra, Ana Teresa Sosa, Juan Carlos Duque, Mayra Villavicencio

Cast: Eduardo Santamarina, Mayrín Villanueva, Alexis Ayala, Silvia Pasquel, César Évora

7. *Válgame Dios*

Production: Venevisión

Direction: José Alcalde

Script: Mónica Montañes, Doris Segul, Gerardo Blanco

Cast: Sabrina Seara, Eduardo Orozco, Ricardo Álamo, Jean Carlo Simancas, Flavia Gleske

8. *La Rosa de Guadalupe*

Production: Miguel Ángel Herros

Direction: Marta Luna, José Ángel García, Ricardo de la Parra

Script: Carlos Mercado Orduña

Cast: Variable

9. *Confesiones del Más Allá*

Production: TV Azteca

Direction: Jorge Gutiérrez

Script: Several scriptwriters

Cast: Ivonne Montero, Raúl Osorio, Aline Hernández

10. *Por Siempre Mi Amor*

Production: Televisa

Direction: José Edgar Ramírez, Ana Lorena Pérez-Ríos

Script: Abel Santacruz

Cast: Susana González, Guy Ecker,
Dominika Paleta, Héctor Suárez
Gomís, Thelma Madrigal

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OBITEL 2016

(Re)Invention of TV Fiction Genres and Formats

It is with great pleasure that we present the Obitel Yearbook 2016, which is the tenth volume of a series started in 2007. Since then, the Obitel established itself in the field of Ibero-American communication studies as an international research network that produces quantitative and qualitative analyses whose main objective is to identify, through comparative studies, similarities, characteristics, adaptations and appropriations among the various national television narratives produced and broadcast in the region. The result of this work is an intercultural study that identifies and interprets the representations that different countries make of themselves and others through the TV fiction productions and the narratives by which such countries build and rebuild daily elements of their cultural identity.

Obitel is made up of 12 national research groups that perform systematic monitoring, throughout a year, of fiction programs produced and broadcast by public television channels in their respective countries. It is worth noting, along 11 years, the improvement of the unified methodological protocol, which includes quantitative and qualitative analysis procedures and techniques. The result of this work provides researchers and practitioners of communication with both synchronic and diachronic view of the transformations that have affected television industries in the Ibero-American context.

For this Yearbook 2016, the Obitel member countries elected as theme of the year the "(re)invention of TV fiction genres and formats", in an attempt to analyze the changes identified in television narratives over time concerning the serialization and the fiction genres. We observe that these narratives have become increasingly hybrid, mainly due to advances in transmedia production and reception. The most important outcome is that the comparative analysis enabled to identify, in all countries, a greater diversity of formats and genres in television fiction.



Editora Sulina