

TV fiction in Argentina 2011 - 2016: state financing and the crisis of private production

La ficción televisiva en Argentina 2011 - 2016: el fomento estatal y la crisis de la producción privada

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Abstract

The production of TV fiction in Argentina, as elsewhere in the region, was historically characterized by geographic centralization in a few urban centers. As of 2009, the National State introduced a disruption through a set of public promotion plans for the federal content production, with the aim of diversifying the players involved in this activity. The change in the Government's leadership in December 2015 modified the logic of these promotion plans, leaving them unfinished. The objective of this work is to produce empirical knowledge and interpretations that allow recognizing the achievements and limitations of state intervention in this market, in view of an evaluation of this public policy and its impact in industrial and cultural terms. This work frames the policy of state promotion in the broader context of the productive crisis that the local TV fiction industry is going through.

Keywords

Fiction, television, public policies, audiovisual, cultural diversity

Resumen

La producción de contenidos de ficción en Argentina, a partir de 2009, introdujo una novedad mediante un conjunto de planes de fomento público para la producción federal de contenidos, con el objetivo de diversificar a los actores involucrados en esta actividad. El recambio en la conducción del Gobierno en diciembre de 2015, modificó la lógica de estos planes de fomento, dejándolos inconclusos. El objetivo de este trabajo es producir conocimiento empírico e interpretaciones que permitan reconocer los logros y limitaciones de la intervención estatal en este mercado, en vistas a una evaluación de la política pública y su valorización como política industrial y cultural. Este trabajo sitúa la política de fomento estatal en el contexto más amplio de la crisis productiva que atraviesa la industria local de la ficción.

Palabras clave

Ficción; televisión; políticas públicas; audiovisual; diversidad cultural

1. Introduction

The drop in production and broadcast of televised fiction from Argentina in the last years is the result of a combination of several factors. On one hand, the acquisition policy of a large number of foreign soap operas -particularly Brazilian and Turkish- that achieved high audience numbers and very successfully occupied prime-time slots on channels in Buenos Aires; in second place, the slow but sure movement of audiences towards other modes of exhibition like paid television or internet-based services, that are added to the audiovisual diet of viewers, compete for their attention, and challenge the business models of different players of the value chain. A third component of the current fiction crisis in Argentina, central to the purpose of this investigation, is the public policy of audiovisual production promotion that began in 2009, that strengthened the weak local industry, and was substantially modified in the way it works starting in 2016¹.

The local fiction crisis being reported from different sectors² is part of a larger issue in the audiovisual sector. In a context of slow but sustained drop in open TV channel audiences and the stagnation in subscriptions to cable TV, the strategy of TV channels tends to minimize or diversify risks, not only through outsourcing to independent production companies or co-productions with local or international partners, but also and especially via the purchase of foreign programs.

The broadcasting of "remakes" on open national television is nothing new, but until 2014 it was limited to full-length soap operas from Ibero-American countries, that generally occupied afternoon time slots, having moderate success. The lower market value of these fictions that, in the case of Brazilians and Turkish, achieved prime-time slots, increased even more the tendency in detriment to local production. According to data from the Ibero-American Observatory of Televised Fiction (known as OBITEL for its Spanish acronym), in 2015 open TV of Buenos Aires broadcasted

527 hours of local fiction and 1,662 of foreign fiction from Mexico, Spain, Colombia, Brazil and Turkey (Aprea, Kirchheimer & Rivero, 2016).

Just before the crisis of private fiction, when fiction production was predicted to include fewer and fewer players, the intervention of the State starting in 2009 introduced a series of novelties, that, without altering the structure of the market, meant the initial push towards a larger federalization of production and diversification in the different stages of the value chain.

Since that year, in the context of the launching of *Televisión Digital Abierta (TDA)* or "Open Digital Television", the State financed the entire production and acquisition of audiovisual content, the majority being fiction, by way of various contests. This promotion mechanism diversified the spectrum of companies dedicated to fiction production and allowed provincial, college, public and private channels to include fiction content in their programming. Some of the content emerging from these contests showed disruptive aesthetic proposals and included social issues in their plot that appeared less in privately-funded fiction.

From the beginning, state funding plans were the object of criticism, especially from the journalist perspective (Crettaz, 2015). After the change in government administration in December 2015, these initiatives were also questioned by the State. First, they were the object of heavier economic scrutiny, and later, public funding was reduced in terms of the total financing of projects.

The partial backing out of the State as fiction industry promoter brought spotlight to and increased a crisis in local production that already existed. This investigation project, empirical and analytical in nature, seeks to characterize the current situation of the Argentine fiction industry. Therefore, it will use indicators such as the reduction in audience numbers and demographic changes in fiction

audiences broadcast on open television. At the same time, it analyzes in detail the policy of promotional financing that the State provided, discussing its main achievements and limitations.

2. Key to theoretic interpretations and methodological aspects

Theoretically speaking, the paper is inscribed in the framework of studies on Political Economics of Communication that provide some factors on how to analyze the changes to the value chain and distribution of the audiovisual industry (Arsenault & Castells, 2008; Zallo, 2011). In addition, this focus enables analysis of the very concentration tendency of cultural industries and the double-sided material and symbolic of cultural goods, whose implications on social production of meaning and the construction of cultural identities propose relative aspects to guarantee cultural diversity in these new scenarios (Garnham, 1990; Mosco, 1996; Sierra, 2006).

In particular, the media system in the region is characterized, among other aspects, for having a marked commercial framework and high levels of concentration in media ownership, in addition to the centralization of content production in large cities. There is also the presence of government-run state media in their editorial lines and with little audience penetration, which has worked to strengthen the private commercial system (Arroyo, Becerra, García. & Santamaría, 2012; Becerra & Mastrini, 2009). In the latter, authors like Fuenzalida (2005) indicate there should be an advance towards a public television matrix with a social focus, as a showcase for national and local events but seeking the largest audience possible (2005: 170). In my opinion, public TV does not occur with the mere broadcasting of a program or work, but rather requires complementarily an effective public audience, that is, neither elitist nor marginal.

Among its multiple effects, concentration of ownership tends to produce "reduction in diversity" (Becerra: 2010: 104) and geographically concentrate production.

Concentration of ownership of the media was facilitated by the different administrations in office at each time, which also provided economic support to large companies and kept regulations weak favoring concentrated interests. In the case of Argentina, recently in 2009, there was a new regulation - Law of Audiovisual Communication Services (known as LSCA for its Spanish acronym)- that, formally, put a limit on commercial treatment of communication and ownership concentration.

Therefore, contrary to the historical tendency that concentrated fiction production in the hands and lands of few, the State introduced a novelty by way of an ambitious promotion plan for production of federal content, which sought to diversify the players involved in the production of audiovisual content. Nevertheless, the experience, just as it was created, did not get very far, and towards the end of 2015, communication policies restored the state of things as it was previous to the LSCA, greasing the gears that allow large economic players favorable conditions and concentration.

In this context, there was a change in the logic and scope of public subsidy plans for fiction production that had been in the works since 2009. The new scenario invites therefore an analysis of the achievements and limitations of the previous experience. In effect, it is important to produce empirical knowledge in attempts to perfect these initiatives in the future and their value as an industrial policy and from a cultural and social perspective.

For this, methodologically speaking the paper is diachronic, exploratory and descriptive, founded in the systemization and analysis of empirical data collected over a period of 6 years. Firstly, it characterizes in general the TV fiction industry crisis in regards to its de-

creasing audience level and changes in viewer demographics.

Secondly, it fully addresses this work's object of study, the public subsidy policy of fiction production. At this point, it partially returns to its main analysis proposed by OBITEL to characterize some aspects linked to production, emission and reception of subsidized fictions, taking into account indicators like the origin of the production; the number of programs and hours broadcast; dominant themes; programming decisions; audience profiles in regards to the main demographic indicators and the scope of these fictions measured in terms of rating and share.

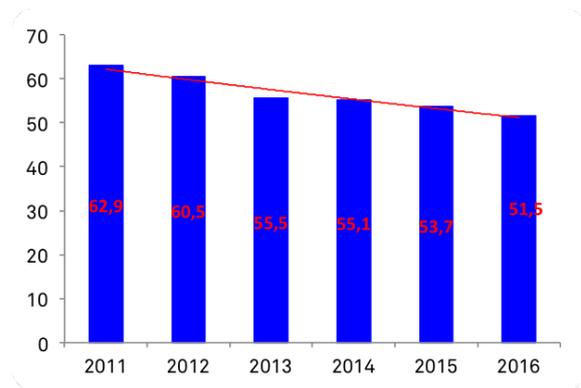
The period began in 2011 with the first broadcasting of subsidized fictions occurs on open TV and finalizes in 2016, after a change in government, that brought with it a change in the logic of this policy. The study does not consider all the productions made as a result of these state subsidy contests, but rather those broadcast between 2011 and 2016 by one of the 5 leading channels in Buenos Aires: Telefe (Channel 11); El Trece (Channel 13); América (Channel 2); Channel 9 and TV Pública (Channel 7). The corpus does not consider broadcasts on local or provincial channels, or the internet.

Finally, it is important to note that this work comes from the analysis of data provided by Kantar Ibope during the last 6 years. This consulting firm plays a key role for the regional audiovisual industry, which bases some of its artistic and commercial decisions on its market studies. However, one must be aware the biases and limitations of the data used, that, at the same time, influence the type and scope of the questions possibly formulated based on them.

3.3. TV fiction on air: less audience and new features

The TV fiction crisis is part of a larger phenomenon that goes beyond even national borders, referring to the slow yet progressive loss of popularity of TV channels in the audiovisual consumption of viewers.

Graph 1: share loss of the 5 open TV channels (2011-2016).



Source: made by author with data from Kantar Ibope

Between 2011 and 2016 the 5 main open TV channels in Argentina, all of them with headquarters in the city of Buenos Aires and with national broadcast via reruns³, lost 11.4% of share. In terms of rating, in 2004 the sum of the 5 channels was 39.1 points and in 2016 this number reached 26.1, a 13-point drop, or 33% of the audience in 12 years. The drop in audience of the open channels could be explained, partly, by a migration to cable TV. According to LAMAC data, starting in 2009, there was a growing tendency of increased rating for cable TV channels in light of a drop in open channels. Finally, from 2014 to the present, the rating sum of all cable TV channels surpasses the sum of public channels⁴. An additional factor is the migration of the audience towards internet based on-demand video services, particularly starting in 2011, with the massification of home broadband connections⁵ and Netflix begins operation in Argentina, which,

according to data from the consulting firm Business Bureau, in August 2017, had reached 847,458 independent subscriptions, leading the video on demand segment. Fiction series, on one hand, was not immune from the drop in rating and share that affected open television, and, since 2013, experienced a decreasing tendency; between then and 2016 it lost 2.2% of audience⁶.

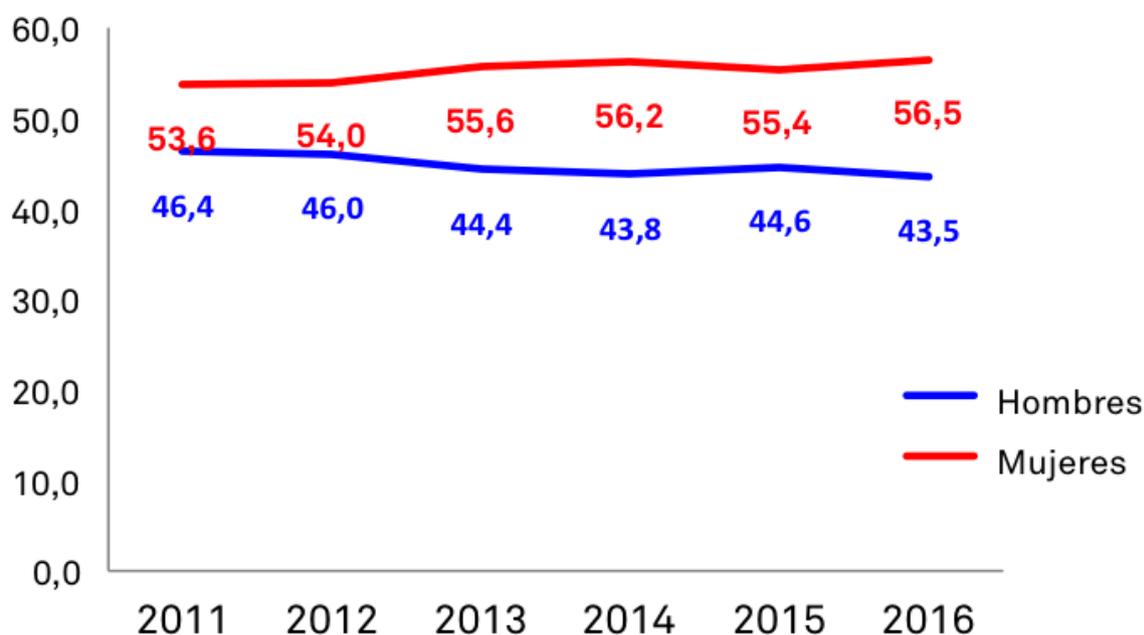
At this point it is necessary to consider the new characteristics of those who still watch open TV to see fiction series, in terms of gender, socioeconomic level and age. These three demographic variables are considered key due to their influence in determining the artistic and communicational projects of channels, and for their interest for the advertising industry.

Although the audience of TV fiction is traditionally largely made up of women, this tendency has increased in recent years. In 2011, the difference between men and women who watch fiction was 7.3%, and in 2016 the di-

fference increased to 12.9%. The greater diversification of the supply on cable and other internet-based screens, together with the supply of open television mainly being soap operas and class melodramas, which are generally more popular with the female audience, makes up part of the explanation.

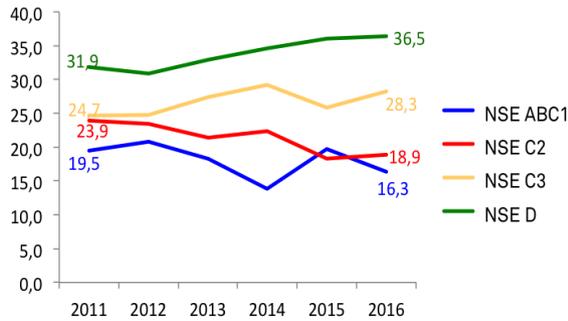
An additional element in audience characterization of open television is the socioeconomic Level (SEL) of viewers, considering that the options of paid cable TV and streaming platforms generally imply paid subscriptions or payments per transaction. In the case of internet platforms, the user must also have a home broadband connection and even an internationally-accepted credit card to make payments in dollars outside Argentina. In this context, audiences watching fiction on open television grows among sectors of lower socioeconomic levels.

Graphic 2: composition of the public fiction audience by gender (2011-2016).



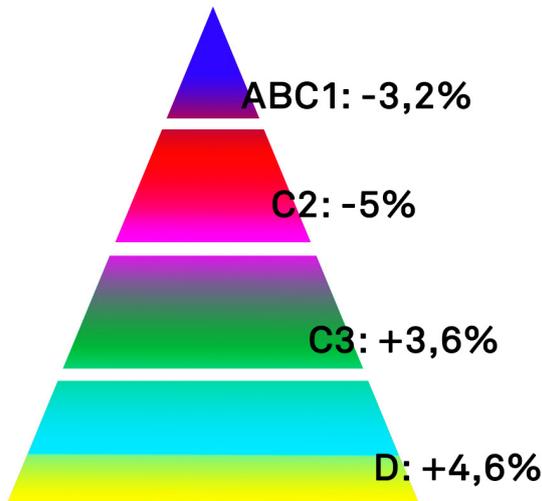
Source: made by author with data from Kantar Ibope

Graph 3: audience composition according to SEL



Source: made by author with data from Kantar Ibopee

Graph 3.1: variation per segment.

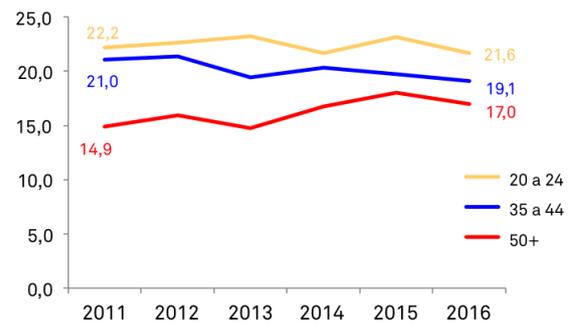


Source: made by author with data from Kantar Ibopee

As you can see in the previous figures, the audience from the lowest SEL segments (D and C3) grew +8.2% during the period of study, with is compensated with the same amount of loss in audiences of higher SEL levels (C2 and ABC1). From this it can be deduced that sectors of higher purchasing power are in better conditions to diversify their cultural consumption by adding premium

cable TV subscriptions and streaming platforms, that capture part of their attention, while open and free TV is the option most preferred by viewers with fewer resources. Nevertheless, it is necessary to indicate that in Argentina the penetration of paid cable TV by subscription surpasses 80% of homes⁷. Finally, there is an increase in the average age of the people that watch fiction series on open TV.

Graph 4: composition of audience by age.



Source: made by author with data from Kantar Ibopee

If you look at both the segment that goes from 20 - 44 years, between 2011 and 2016, the drop is 2.5%, which is compensated with a similar increase among viewers age 50+. In other words, the audience watching fiction on open television is getting older.

In summary, the analysis of these indicators shows that the decline (moderate) in audience levels is not the only novelty for the fiction series in open television between 2011 and 2016. Audience characteristics also changed: the public is growing in its number of female viewers; there was an 8.2% increase in the participation of segments of lower socioeconomic level and the older audience grew. These statements deserve separate studies that explain the changes more in detail, which possibly obeys a concurrence of variables related not only to the artistic proposal of open television, but to others linked to the proliferation of the offer on multiple screens, changes in consumption habits and the de-programming of audiovisual content in general.

As response to the crisis open television is experiencing, in recent years channels have put strategies into practice in order to adapt to the new times of lower rating and changes to the viewer profile and customs. In some cases, they sought to establish links with the web, especially in those fictions focused on the youngest audience, thus expanding the narrative fiction universe broadcast on online television. Plus, the public channels seek to make agreements with cable channels, international distributors or cable TV providers, to co-produce high-budget series, reducing commercial risks and guaranteeing a larger international distribution. Nevertheless, the most common strategy on local screens of late was the broadcasting of foreign fiction. As previously mentioned in the introduction, only in 2015 open TV of Buenos Aires broadcast 527 hours and Argentine fiction and 1,662 hours of foreign production. These fictions come from various places: Brazil, Turkey, Mexico, Colombia, and even South Korea. This recession in the national industry alerted the main associations comprised by the industry's key players (actors, screenwriters, directors, independent production companies), with particular emphasis starting in 2016 when, after the change in government, the state subsidy policies of fiction production, until then in full effect, changed their logic and the resources destined for these purposes decreased noticeably, fully revealing the preexisting crisis in the sector.

4. The State and Fiction: achievements and limitations of policy for the promotion of content production (2011-2016)

Starting in 2009, during the administration of Cristina Fernández (2007-2011 and 2011-2015), in the context of implementation of the Argentine System of Digital Terrestrial Television (known as "SATVDT" for its Spanish acronym), the State financed the production and acquisition of audiovisual content via different contests. The Operative Plan of Subsidy and Promotion of

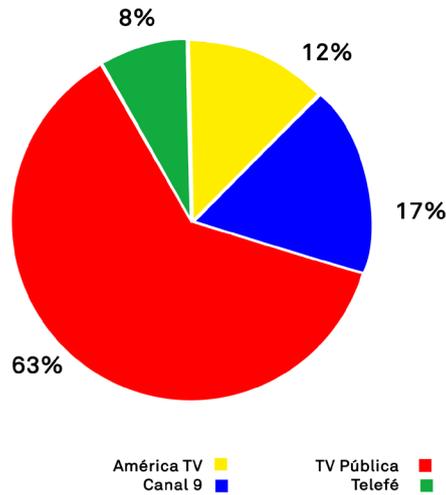
Digital Audiovisual Content for television held 43 contests and distributed 573 subsidies that resulted in 267 productions; including series, cartoons, short films and documentaries, equivalent to 1,521 hours of content (MPFIPyS, 2015). Some of them were broadcast by private channels from the city of Buenos Aires and outside the capital, as well as public channels, while others were not broadcast on TV. The majority of the productions were stored in the Banco Audiovisual de Contenidos Universales Argentino (BACUA), a repositorium that, according to official numbers, since its creations has distributed 12,000 hours of programming to 74 public and private channels members from all over the country. In addition, within the context of BACUA, the new defunct Contenidos Digitales Abiertos (CDA) was created. This was a free platform created as an internet showcase. Today, some of the series financed by the State can be seen *online* on the platform Cont.ar created in May 2018 by the Federal System of Public Media and Content (known as "SFMyCP" for its Spanish acronym).

As previously mentioned in the introduction, the subsidy plans have been a subject of controversy, especially from the journalism industry, in regards to the volume of the investment made by the State, the criteria used to award funding and the difficulty for the programs to reach mass audiences. Nevertheless, no in-depth studies are known to have addressed the full impact of this policy in regards to subsidizing the local audiovisual industry and the diversification of players in the different stages of the value chain. For now, according to UNESCO data, thanks to the LSCA and state subsidy policies, there was a 28% increase in broadcast of local content on the country's regional channels (UNESCO, 2015: 53).

4.1 Analysis of state-subsidized fiction premiered on public channels⁸

Between 2011 and 2016 64 state-funded fictions aired on four of the five public channels located in the city of Buenos Aires.

Graph 5: Programs broadcast by channel (2011-2016).



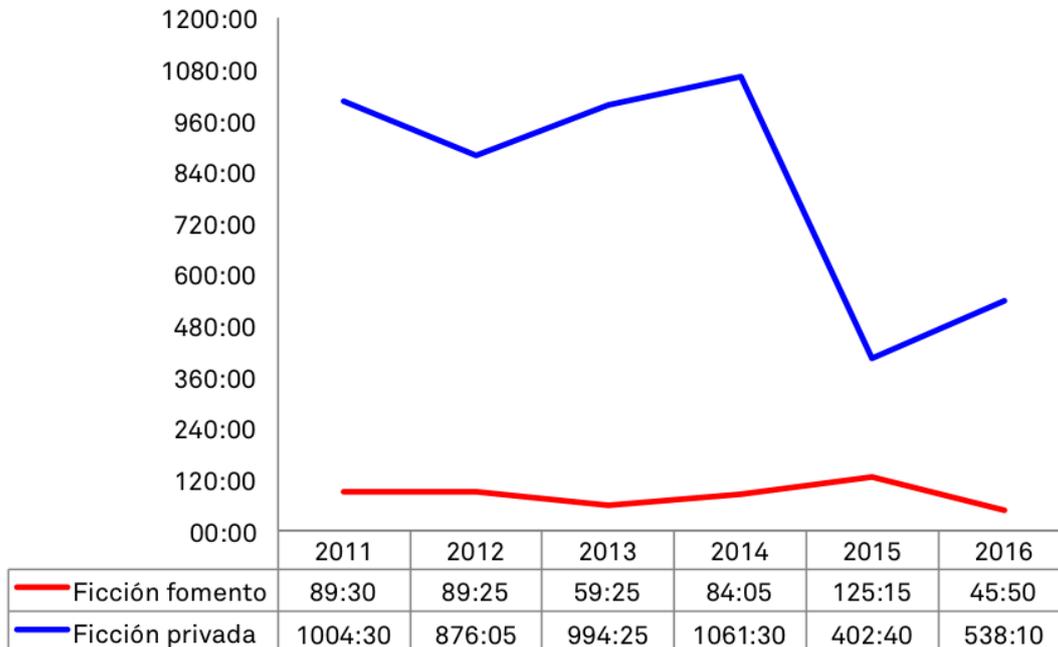
Source: made by author with data from Kantar Ibope and Obitel.

State-owned TV Pública programmed the largest amount of mini-series and individual programs (63%), followed by privates Canal 9

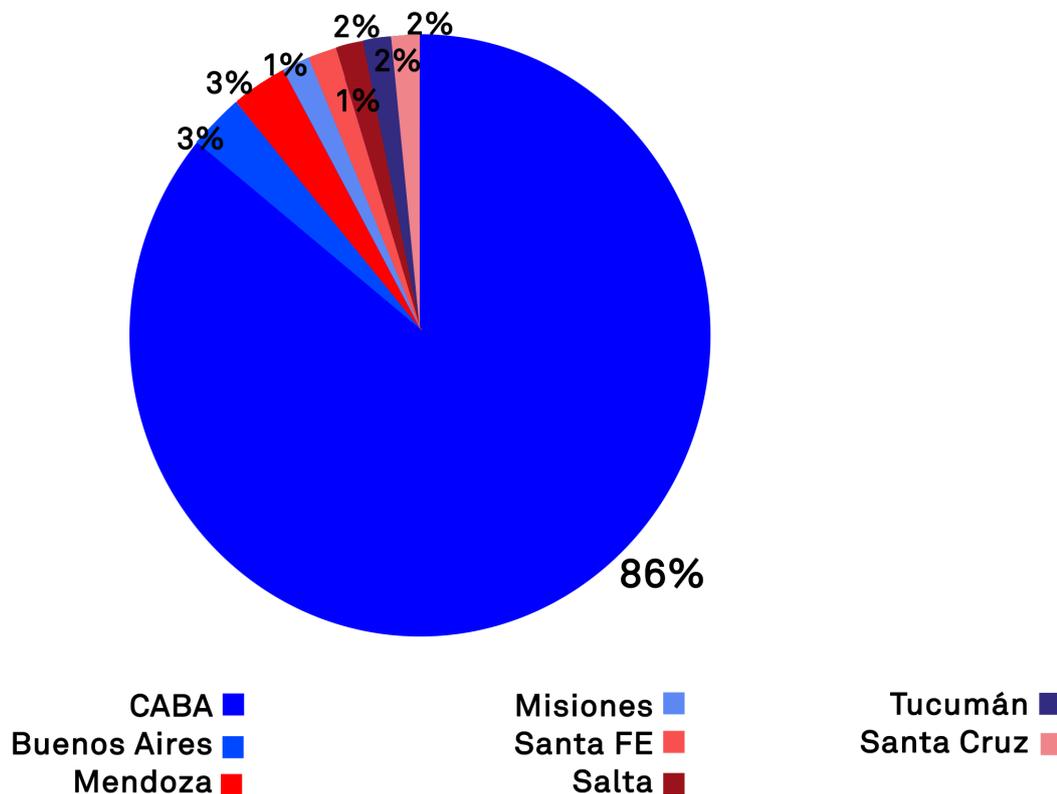
(17%), América (12%) and Telefé (8%). El Trece (Grupo Clarín) was the only licensed public television network that did not broadcast a fiction financed by the State, which should be considered in the context of the tense relationship between Grupo Clarín and the executive office during the last two Kirchnerist administrations (2007-2015). On the other hand, 52 privately financed and produced fictions premiered in the same period⁹.

Nevertheless, if you count the hours broadcast¹⁰, the participation of subsidized fictions is less, given that, the majority were mini-series and individual programs of short duration, of 8 to 13 episodes, between 20 and 45 minutes each one, while private television produces, in general, longer fictions, over 120 episodes, of 45 minutes without commercials on average. Maximum point of broadcasting occurred in 2015 which coincides with an abrupt decline of over 50% in private production. In 2016, after the change in government, subsidized fiction broadcasting is the least of all series.

Graph 6: Changes in hours broadcast - subsidized and private fiction (2011-2016).



Source: made by author with data from Kantar Ibope and Obitel.

Graph 7: Subsidized fictions by province of origin (2011-2016).

Source: made by author with data from Kantar Ibope and Obitel

As a reflection of the historic centralization of the audiovisual production in the city of Buenos Aires, open television channels programmed largely fictions of production companies from that same city (86%). However, for the first time there were also some contents broadcast that were fully produced in other regions of the country. Although this did not manage to alter the market structure or go beyond a few certain cases of subsidized fictions, it did represent a novelty in terms of this public policy. At this point it is necessary to point out a limitation in the body of this study, given that local and provincial channels did program numerous federal fictions during these years.

Although the public subsidy policy brought about the diversification of players with capacity to produce fiction in the country, including

others from different places and organizations, like colleges and cooperatives, channels in Buenos Aires, including TV Pública, favored products from local companies, many of them with recognized experience in the industry. As observed in the previous table, the totality of the top 20 most watched subsidized programs correspond to production companies located in the country's capital.

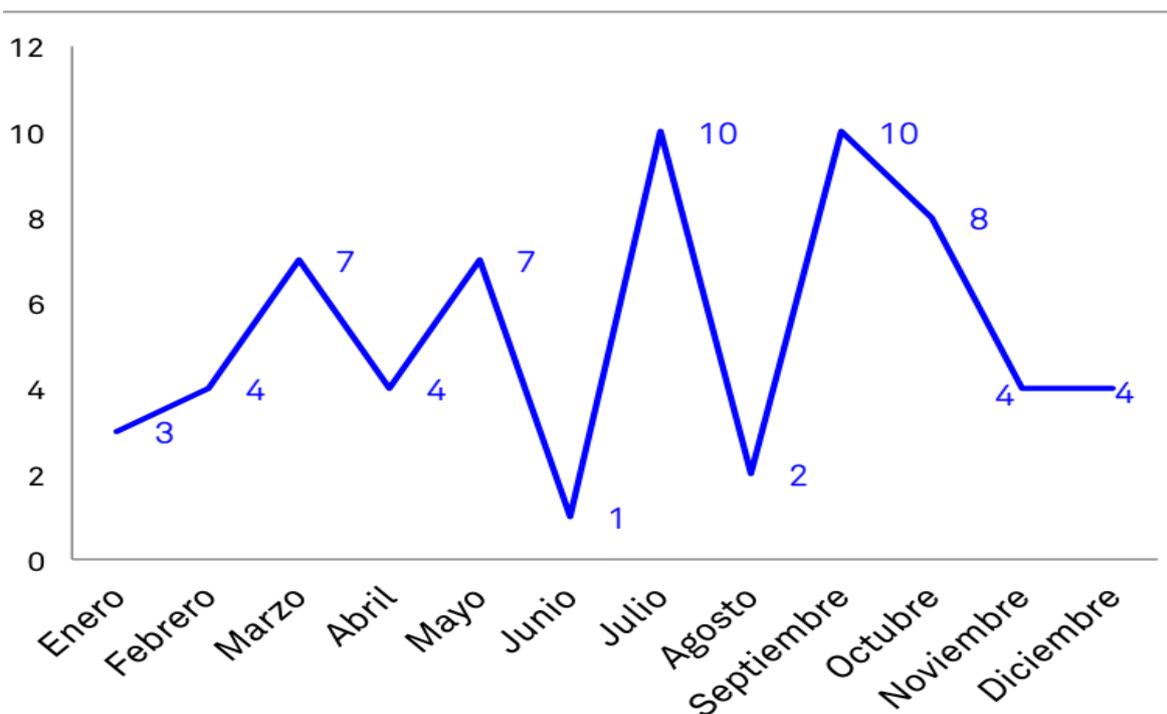
In addition, despite TV Pública being the one that broadcast 63% of these fictions, the majority of the most watched programs are those that were broadcast by private channels, especially Telefé, the audience leader since the early 90's. Among the creators of the fictions with the best *rating* are companies with a long history of experience in audiovisual production, some with habitual ties to private channels.

Table 1: top 20 most-watched subsidized fictions (2011-2016).

	Título	Origen	Productora	Canal	Franja	Rating	Share
1	Historia de un clan	CABA	Underground	Telefe	Prime Time	11,78	19,54
2	El Donante	CABA	Eyeworks Cuatro Cabezas	Telefe	Prime Time	11,3	19,88
3	Fronteras	CABA	Zoelle Producciones	Telefe	Prime Time	8	s/d
4	La Celebración	CABA	Underground	Telefe	Noche	6,61	14,64
5	Historia Clínica	CABA	Underground	Telefe	Noche	6,27	14,1
6	Maltratadas	CABA	T y C	America 2	Prime Time	4,2	6,7
7	Historias de la primera vez	CABA	Illusion Studios	America 2	Prime Time	3,3	5,3
8	Televisión x la inclusión	CABA	ONTV Contenidos	Canal 9	Prime Time	3,2	5,3
9	Santos y Pecadores	CABA	ONTV Contenidos	Canal 9	Prime Time	2,66	3,6
10	Conflictos Modernos	CABA	ONTV Contenidos	Canal 9	Prime Time	2,63	4,11
11	Víndica	CABA	Promofilm	America 2	Prime Time	2,5	4,1
12	Los Sonicos	CABA	GP Media	Canal 9	Prime Time	2,5	3,8
13	El Pacto	CABA	Oruga Cine y Tostaki	America 2	Prime Time	2,4	4
14	Círculos	CABA	Zarlek	America 2	Noche	2,34	5,94
15	Decisiones de vida	CABA	LC Acción/Diego Estevanez	Canal 9	Noche	2,3	4,2
16	Tiempo de pensar	CABA	a + A Group	TV Pública	Prime Time	2	s/d
17	La Casa	CABA	Campo Cine	TV Pública	Prime Time	2	s/d
18	Viento Sur	CABA	Azteka Films	America 2	Noche	1,91	4,83
19	Milagros en Campaña	CABA	El oso producciones	Canal 9	Prime Time	1,76	2,48
20	Amores de Historia	CABA	Oruga Cine y Tostaki	Canal 9	Prime Time	1,73	2,74

Source: made by author data from Kantar Ibope and Obitel.

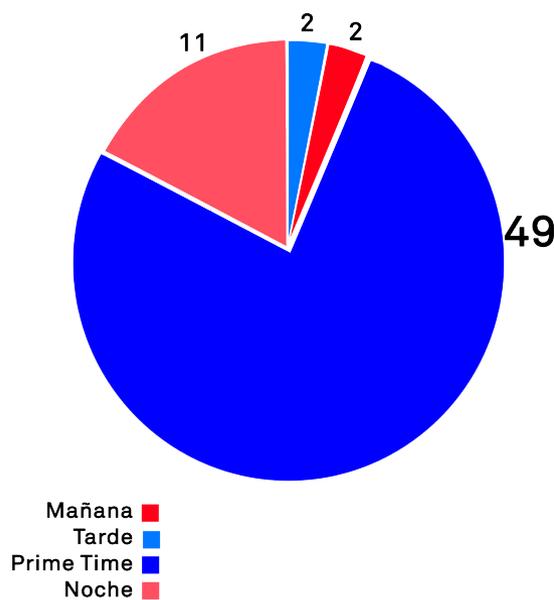
Graph 8: Total subsidized fictions by premiere month (2011-2016).



Source: made by author data from Kantar Ibope and Obitel.

As observed in the previous graph, it is difficult to establish a tendency in regards to the premier dates of these fictions, that were programmed at irregular times during the entire year. The short duration format and unavailability of second seasons was a challenge for the channels' programming policies. As Martín Bonavetti (Executive Director of TV Pública between 2008 and 2016) says "in terms of programming, an 8-episode fiction, just when the people begin to watch it, it's already over", to which he adds "you can't create a fiction without knowing on which screen it will be broadcast, because the screens have their own identity"¹¹. The premiere date of a television show and its time slot provide information about the hierarchy given to the product. For example, the first subsidized fiction, *El Paraíso* (2011), was broadcast by TV Pública between December 19, 2011 and January 4, 2012, with scarce previous promotion and during a time of low television consumption.

Graph 9: Total fiction by broadcast time slot (2011-2016).



Source: made by author data from Kantar Ibope and Obitel.

The majority of these fictions was broadcast during prime-time, from 21 to 24 (76%), followed by the evening, from 0 to 6 (17%) and to a lesser degree in the morning, from 6 to 13 (3%) and the afternoon, from 13 to 21 (3%). Nevertheless, it is observed that many of them were programmed close to or after midnight, a less common practice in the case of privately-funded fictions, that usually take up popular slots like prime-time and afternoon. Broadcasting frequency varied between 1 to 5 days per week. Some came on Monday through Friday resulting in them being on screen barely two weeks, while others came on once a week, managing to last more than three months. The overabundance of programs and the different days and times chosen for their broadcast hurt the following and continuity of the stories on behalf of the audience. This fact explains why the fiction with better performance in terms of *rating* were those individual shows.

In effect, although in total a greater amount of mini-series (44) were shown than individual shows (20) this proportion is just the opposite among the top 20 most watched, 13 of which were individual shows. As we have said, the brevity of the programs, added to their different programming strategies and the abundance of the supply favored the self-concluding formats that did not require continuity on behalf of the audience.

Some of these fictions proposed a disruptive aesthetic treatment, in some cinematographic case, due to the provenience and expertise of its creators, together with good technical quality. In almost all the cases, a social issue was addressed: gender violence, discrimination and marginality. A second group of fictions adopted the agenda of Kirchnerism as *leitmotiv*, with plots referring to human rights and identity, communication media, dictatorship, Peronism or expanding and conquering of social rights. On some occasions the political motivations behind some fictions overshadowed the artistic logic, resulting in stories a priori, interesting but poorly created due to a Manichaeian treatment of the events and people.

Table 2: Total fictions according to era of narrative.

Época	Títulos	%
Presente	49	76,6
de Época	6	9,4
Histórica	7	10,9
Otra	2	3,1
Total	64	100,0

Source: made by author with data from Kantar Ibope and Obitel.

The larger diversity of themes is also reflected in the time of the narrative. Although the majority draws in the audience from the present (76%), contrary to privately-funded fiction, where this almost exclusively predominates, the subsidized introduce proposals set in other eras (9%); based on historical events and people (10%) and others that take place in more than one era (3%).

Table 3: Comparison of subsidized and private audiences according to gender and SEL (average).

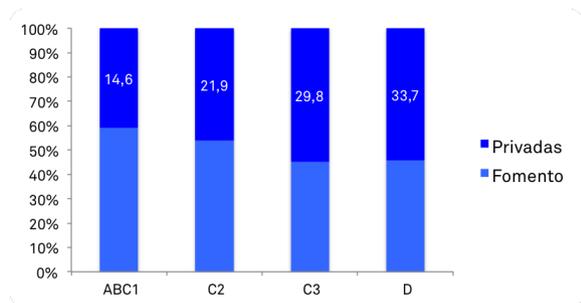
	10 ficciones fomento más vistas (2011- 2016)	10 ficciones privadas más vistas (2016)
Hombres	46,8	40,5
Mujeres	53,2	59,5
ABC1	21	14,6
C2	25,6	21,9
C3	24,5	29,8
D	28,4	33,7

Source: made by author with data from Kantar Ibope and OBITEL

In terms of audience characteristics of the subsidized series, the main demographic variables show some similarities but also differences with fiction in general, of which we previously mentioned in this paper. As seen the table above, the female audience leads in both subsidized fiction and pri-

vately-financed fiction, but in the case of the first, the difference between genders reduces noticeably (public: 6.4%; private: 19%). This is caused, in part, by the brevity of the formats, and fundamentally, to the large thematic variety that allows draw in other audiences.

Graph 10: audience of private and subsidized fiction according to SEL¹².



Source: made by author with data from Kantar IBOPE and OBITEL

In terms of audience composition by age, we observe that private fiction has a larger audience among young people (4 to 24), while subsidized fiction has almost half of its audience in the older segments of the population (+35 and +50 years).

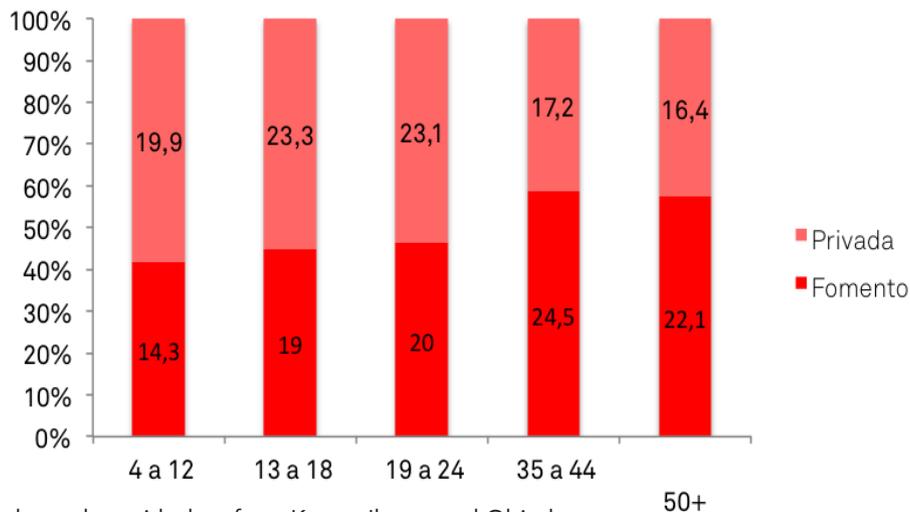
Finally, we observe a socio-economic and age difference in relation to the viewing of these subsidized fictions. In terms of socio-economic level (SEL), the ABC1 and C2 segments, of higher income, have more weight among subsidized fictions, while, as we saw in the previous section, the audience of segments C3 and D, of less income, have more weight in the composition of the audience of private fiction.

5. Conclusions

The crisis of fiction series on television in Buenos Aires is framed within a mayor that affects the entire open television industry, which slowly but surely is losing ground to other forms of access of audiovisual consumption, while there are changes in audience characteristics. The creation of some co-productions, and fundamentally the programming of foreign fiction, were the main responses in an uncertain scenario, of high business risk and constant transformation.

When the crisis loomed and everything indicated that content production would be focused on fewer and fewer players, the State introduced a novelty, and starting in 2009, it became one of the country's main fiction producers. This public policy allowed for the generation of some interesting

Graph 11: Audience of private and subsidized fiction according to age (average).



Source: made by author with data from Kantar Ibope and Obitel

experiences and capacities of production in places where there had not been before. However, its redesign in the last two years, which included the partial backing out of the State, completely revealed a critical situation for the national industry, that began at the beginning of the decade.

The market and ownership concentration as characteristic on which the media industry is structured in Argentina is ensured by the production and distribution of fiction series. Two public TV channels of Buenos Aires concentrate the production of almost all televised fiction broadcast on a national level. In regards to this, and the need to generate content for the new Open Digital Television, the State created a subsidy policy for content production that survived barely 5 years. The little amount of running time of the experience combined with the mistakes attributed to it, brought about its disassembly by the current administration, interrupting, with arguments related to economics and the market, the process of maturity of a novel experience for the country.

The question that currently emerges is with what objectives and to what degree should the State intervene in order to promote the local industry of televised fiction. The change in logic and scope of the subsidy plans starting in 2016 invites for a detailed analysis of the achievements and limitations of the previous experience. It is important to seek empirical knowledge in terms of perfecting these initiatives and their value as an industrial and cultural policy.

During the study period, public television in Buenos Aires broadcast 64 individual programs and fiction series produced with state subsidies; TV Pública was the channel that broadcast the most of these contents. Some 86% of the subsidized fictions broadcast were created by production companies from the city of Buenos Aires, but many shows coming from outside the capital also managed to be aired nationwide.

The programs with the highest rating were shown on private channels and many of them were produced by companies with a long history of experience. Due to the brevity (8 to 13 episodes), these fictions were a challenge for

channel programming policies. They premiered throughout the year, with a variable frequency of 1 to 5 airings weekly, the majority during the last prime-time slot or after midnight. In terms of content, they contribute issues of social interest not commonly addressed in private fiction.

The demographic variables show that, thanks to their wide variety of themes, these fictions attracted more male audience members than private fictions which reduced the existing gender gap in the audience composition of televised fiction, traditionally comprised of more females. In terms of age, there was more viewing by people age 35 and older. In terms of SEL, subsidized fiction audience increased among segments with higher purchasing power.

Notes

1. For more clarity on the time period of this study, we note that in 2009 the first call for audiovisual production projects with state subsidy was held, which officially launched this policy. In 2011, the first completed productions began to be broadcast on television in Buenos Aires and in the rest of the country. In December 2015, there is a change in government administration which brought about a modification in the way these subsidy plans work. In effect, the period of study, 2011-2016, allows for analysis of the object starting with the first TV broadcasts, on one hand, and observe the functioning of this public initiative before and after the change in government, on the other.

2. Various entities related to the audiovisual industry like the Asociación Argentina de Actores; el Sindicato Argentino de Autores (SADA); Directores Argentinos Cinematográficos (DAC); Sindicato Argentino de Músicos (SADEM); Sindicato Argentino de Televisión (SATSATID), among others, came together in 2016 in the Multisectorial Audiovisual, with the objective of calling attention to and finding solutions to the sector's production crisis. In late 2017, the organization presented to the national congress a project of TV and new platforms subsidy law. See <http://multisectorialaudiovisual.org/>

3. Channels with their headquarters in the city of Buenos Aires broadcast their programming to the rest of

the country in different ways. In some cases, it was through their own network channels they controlled directly; representative channels that rebroadcast the programming via reruns and by way of selling content to provincial independent channels, which only increases the influence of programming in Buenos Aires on a national level.

4. See information at <http://www.lamac.org/argentina/me-tricas/rating/>

5. Home broadband connection is fundamental for home consumption of videos by streaming. According to data from the UIT, the penetration in Argentina in 2011 was 11.3 connections per 100 people, while 5 years before, in 2007, it was 6.6 per 100 people. See ITU Statistics. Time Series by Country: <http://goo.gl/3P0Axh>

6. Kantar Ibope data processed by the author.

7. See penetration of paid TV in Argentina per home per year at <http://www.lamac.org/argentina/metricas/total-por-tv-paga/>

8. Not part of the corpus of analysis are other fictions of public production and/or financing that did not come directly from the subsidy plans, like for exam-

ple: Esa Mujer, Área 23, Presentes, Doce Casas, Los siete locos y los Lanzallamas, Variaciones Walsh and El Marginal, all broadcast on TV Pública.

9. This number comes from the yearly study performed by OBITEL. The 2011-2016 annuals can be viewed at <http://obitel.net/>

10. To count the hours broadcast following the methodological protocol of OBITEL you must subtract the of 12-minutes-per-hour commercial break, as established in Article 82 of Law 26.522.

11. See There is a channel that begins to turn. Interview with Martin Bonavetti in the newspaper Tiempo Argentino 14.01.2013. Available on 22/01/2017 at <https://goo.gl/AGB3JS>

12. Graphics 10 and 11 compares the audience composition according to SEL and age respectively, of the top 10 most-watched private fictions during 2016, with the top 10 most-watched state subsidized fictions between 2011-2016. This methodological decision is based on the fact that private fictions are longer and thus a private soap opera of 180 episodes equals 13 mini-series at 45 minutes per episode.

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Webography

LAMAC. Latin American Multichannel Advertising Council. <http://www.lamac.org/argentina>

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- Kantar Ibope. Complete data matrix on fiction provided by Kantar Ibope to OBITEL Argentina 2011- 2016.
- Law 25.522/09 of Audiovisual Communication Services.

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