

URUGUAY: THREE DIMENSIONS OF TELEVISION INTERNATIONALIZATION

DOI: <https://doi.org/10.7764/obitel.23.e.uru>

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Introduction

Ibero-American television experienced internationalization flows very early, mainly referring to the circulation and commercialization of scripts, as well as the presence of American series and films in the programming grid of all countries. The processes became more complex over the decades and expressions such as transverse television (Straubhaar, et. al., 2021) and transnational television (Chalaby, 2016) have been used to name new manifestations of the phenomenon, in particular, how *streaming* platforms and VoD have shaped a new era of offer and consumption but have also affected ways of production.

In this chapter we will analyze three manifestations of the phenomenon in Uruguay: one is the historical broadcast TV trend of importing programs of different genres, especially fiction; another is the local production of large formats, realities and or contests, such as *Master Chef* or *¿Quién es la Máscara?*, which have versions in different countries, showing a global homogenization of the offer; finally, Uruguay's participation in the internationalization of television fiction production processes, by producing series for platforms such as Prime Video or HBO Max, which however have other countries of origin.

1. The Audiovisual Context of Uruguay in 2022

1.1. Broadcast television in Uruguay

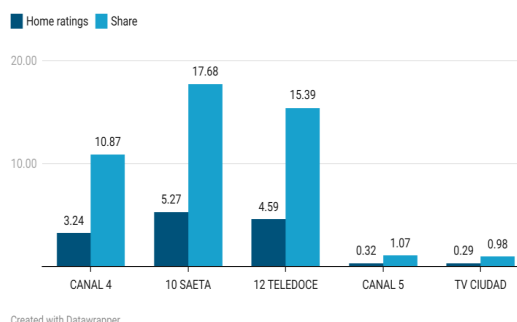
Chart 1. National broadcast television networks/ channels in Uruguay

Networks/private channels (3)	Networks/public channels (2)
Canal 4 (Channel 4)	Canal 5
Saeta (Channel 10)	TV Ciudad
Teledoce (Channel 12)	
PRIVATE CHANNELS TOTAL= 3	
PUBLIC CHANNELS TOTAL= 2	

Source: Obitel Uruguay

Graph 1. TV rating and share by station¹

TV station	Home Rating	%	Share
CANAL 4	3.24	23.63	10.87
10 SAETA	5.27	38.44	17.68
12 TELEDUCE	4.59	33.48	15.39
CANAL 5	0.32	2.33	1.07
TV CIUDAD	0.29	2.12	0.98
Total:	13.71	100	45.99



Source: Kantar Ibope Uruguay.

For this report we used audience data from public channels, which did not occur for several years; this enabled us to have a complete picture of the audience preferences in terms of *rating* and *share*.

Graph 1 shows that Channel 10 Saeta maintained its predominance with 5.27 *rating* points and Teledoce followed shortly behind with 4.59 points. Public channels kept the historical trend of very low audience levels.

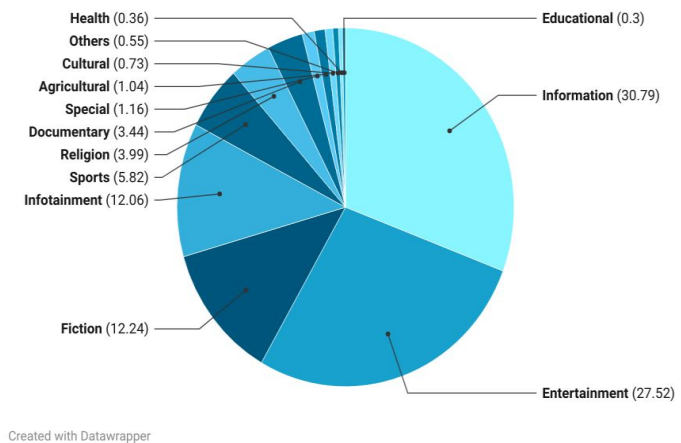
Broadcast television audience has been declining in its global volume and this occurred again in 2022. In a diachronic perspective, the successive reports of Obitel Uruguay revealed how, while in 2013 the *share* exceeded 60% and the *rating* was 21 points, in 2014 –with 58% *share* and 18.7 *rating*– began a decline that continues until today. In 2021 the total *rating* had been 14.81 and in 2022 it fell again by one

¹ We thank Kantar Ibope Uruguay for providing us with the necessary data for producing this report, especially we want to recognize the collaboration of Carolina Arigón and Valentina Cal for the generosity of their time.

point. Broadcast television as a whole reached almost 50% of the share and pay-TV 31%, while the remaining 20% refers to the consumption of other contents. If the type of viewing of broadcast television and pay-TV is considered, 67% of consumption is individual and 33% is co-viewing (Kantar Ibope Uruguay, 2023).

Graph 2a: TV broadcast genres and programming hours²

Broadcast genres	Hours	%
Agricultural	336:32:00	1.04
Cultural	235:55:00	0.73
Sports	1881:25:00	5.82
Documentary	1112:08:00	3.44
Educational	96:58:00	0.30
Entertainment	8893:16:01	27.52
Special	375:03:00	1.16
Fiction	3956:05:00	12.24
Infotainment	3896:50:00	12.06
Information	9948:01:00	30.79
Others	176:19:00	0.55
Religion	1289:28:00	3.99
Health	116:17:00	0.36
TOTAL	32314:17:00	100



Source: Obitel Uruguay based on Kantar Ibope Media Uruguay data

Graph 2a represents how broadcast hours are distributed among television genres of all origins, including domestic and imported production. The data reveal the consolidation of a trend that has been settling in the last five years: the hegemony of the information and entertainment categories in screen time and the decrease in the number of hours devoted to fiction.

In 2022, information and entertainment accounted for 58.31% of total hours. Fiction, almost in the same percentage as infotainment, ranks third, but this is not the novelty because it has already happened before³, but the most substantive is the reduced number of hours devoted to this genre, 3,956 hours, representing 12.24% of the total hours, confirming the phenomenon of the shift of such programmes to entertainment programmes as has been noted in Obitel’s previous reports.

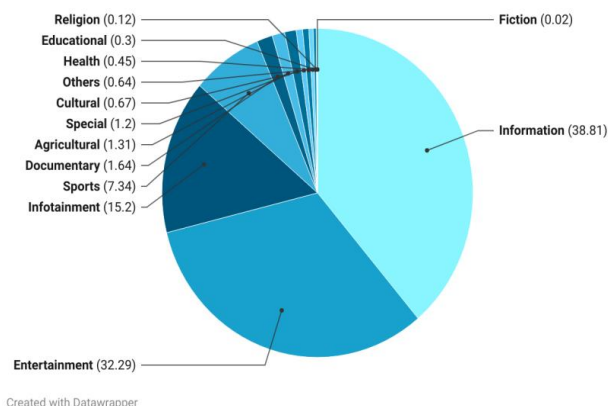
² The programming graphs include this year again the programming of Channel 5 that we had not been able to report between 2017 and 2021, as it was not included in the measurements of Kantar Ibope. The programming or broadcast hours of Tevé Ciudad are not included because it is a channel of Montevideo.

³ Thus, in 2016 and 2017 fiction ranked third place in screen time, but the volume was 7,850 hours, which represented 26% of the total broadcast. In 2014 it ranked first with more than 8,000 hours.

The hours occupied by domestically produced programmes accounted for 79% of total broadcast hours. The distribution between the different genres is detailed in Graph 2b.

Graph 2b. Broadcast TV genres of national production

Genre	Broadcast hours	%
Agricultural	336:32:00	1.31
Cultural	171:14:00	0.67
Sports	1881:25:00	7.34
Documentary	420:06:00	1.64
Educational	77:43:00	0.30
Entertainment	8277:00:00	32.29
Special	308:35:00	1.20
Fiction	06:02:00	0.02
Infotainment	3896:50:00	15.20
Information	9948:01:00	38.81
Others	164:41:00	0.64
Religion	30:25:00	0.12
Health	116:17:00	0.45
	25634:51:00	100



Source: Obitel Uruguay based on Kantar Ibope Media Uruguay data

The programming structure shows that the broadcast television channels defined a screen time distribution strategy that prioritized information, mainly newscasts and some journalistic programs, allocating 38.81% of the screen time to that genre and 32.29% to entertainment. The resources devoted to production were directed to the latter: some large international formats and, in some cases, new national programs that depend on those. National television fiction is the great absentee this year. The six hours assigned to fiction recorded in the graph correspond to a Uruguayan film cycle broadcast by Channel 5.

1.2. Pay-TV and VoD platforms in Uruguay

Chart 2. Main pay-TV networks in Uruguay

Network	Origin
TCC	Uruguay
Nuevo Siglo	Uruguay
Cablevisión (Flow)	Argentina
Multiseñal	Uruguay
Montecable	Uruguay
Direct TV	United States

Source: Obitel Uruguay

According to the annual report of the Communications Services Regulatory Unit (Ursec, 2022) the television services for subscribers were 573,746 and had a slight decrease compared to the previous year, with 33,163 fewer ones. Direct TV has 30% of the market, Cablevisión 8%, TCC 7%, Nuevo Siglo 6% as well as Montecable, while 2% corresponds to Multiseñal. 53% of the services are in Montevideo and the metropolitan area (pp. 116-117). In October 2022, Direct TV, which offers satellite television services throughout the country, joined the Uruguayan Chamber of Television for Subscribers (CUTA), which brings together 82 television cable operators from the rest of the country, which meant a change in the relationship with its main competitor (Búsqueda, 2022).

The main international SVoD platforms are Netflix, Amazon Prime, HBO Max, Flow (Cablevisión), Movistar+ (Telefónica), Claro Video (América Móvil), Disney+, Star+, Paramount+, Mubi (Cinema – feature films). In addition, two national platforms operate. One is Cinemateca, dedicated exclusively to cinema, and the other is the public platform dependent on the state telephone company National Telecommunications Administration (Antel), VeraTv that in August 2022 was renamed as AntelTV.

In March 2022 was announced the availability for Uruguay of the free streaming platform Vix, from the Televisa-Univision group. It is an AVOD service (advertising-based video on demand) that offers mainly soap operas from Televisa. This platform would be added to another already operational AVOD: Pluto TV. Both function as live channels that also enable on-demand content.

1.3. Sources of financing for the audiovisual sector

As in previous years, information on financing is difficult to access. According to data provided by Kantar Ibope, prepared from Monitor Evolution, 92.77% in

a media advertising investment in 2022 was devoted to television. In television fiction, the five main advertisers took around 545,374 seconds.

The state support instruments continue to be the same as those reported in previous yearbooks with the exception that in 2022 there was no call for SeriesUy, a public fund intended to support national television fiction.

1.4. Communication policies (laws, reforms, incentives, digital TV, etc.)

The most relevant event of the year 2022 was the change in the institutional framework for the audiovisual sector. The Uruguayan Film and Audiovisual Agency (ACAU) was born, replacing the Uruguayan Film and Audiovisual Institute, created in 2008⁴ and which depended on the Ministry of Education and Culture. The new agency is a non-state legal entity of public law whose function will be the management of already existing incentive instruments, in addition to generating others that give impetus to the development of “the national film industry, within the framework of creative and cultural industries” (Law 20075). The new agency has a paid director and an honorary representative from the Ministry of Education and Culture (MEC), another from the Ministry of Industry, Energy and Mining (MIEM) and another from the Ministry of Economy and Finance (MEF), in addition to a representative of the audiovisual sector. The board of the new entity took office in January 2023.

The proposal for the creation of the new institutional framework -included in the Accountability Law discussed in Parliament in mid-2022- caused opposition in some sectors. One of the controversial aspects referred to the suspicion that it would have an exclusively industrial orientation to the detriment of the cinematographic and artistic aspects, because of the dependency of the MIEM Agency and the absence of a definition of a cinematographic work in the original project. Dialogue and negotiation took place between different actors and the original text was finally modified. The registration of the Agency’s operation in the orbit of the MEC and its Directorate of Culture, in addition to the explicit emphasis on cinema, including the definition of a cinematographic work, led to a certain consensus for its creation. ACAU will have a budget of 40 million pesos and the Cinematographic and Audiovisual Promotion Fund of 54 million pesos, in addition to other funds that may be assigned.

1.5. Digital and mobile connectivity infrastructure

Internet and mobile telephony infrastructure is provided mainly by Antel⁵. Fixed broadband services have grown steadily in the last decade and reached 1,135,500 in

⁴The predecessor of this institution was the National Audiovisual Institute created in 1994 (under the government of Luis Alberto Lacalle Herrera by Decree N° 270/994) which had, among other tasks, to prepare a draft Law for the Promotion of national audiovisual production. Finally, in 2008 the Law for the Creation of the National Film and Audiovisual Institute and the Film and Audiovisual Promotion Fund (Law N° 18284) was passed, modified partially with the creation of this new agency.

⁵A more detailed description of these aspects can be found in the 2019 Yearbook chapter, “Uruguay: broadcast television, the new actors and the rules of the VoD game” (Sánchez Vilela, Gadea, 2019, pp. 379-382).

2022. Almost all of them are operated by Antel and only 2,027 services correspond to the company Enalur (known in the market as Dedicado) which lost 50% compared to what it had in 2018.

98% of the services are residential and the rest correspond to the government and companies. 93% are wired connections -they all belong to Antel- and the predominant transmission medium is optical fibre, covering 87% (Ursec, 2022, pp. 44-48). The laying of optical fibre enabled wide coverage of high-speed internet access, positioning Uruguay as a case that stands out in the region. The expansion of connectivity provides good conditions for the consumption of internet television.

In 2022 the Executive authorized five cable operator companies to provide internet services in their coverage areas. Media Law 19307 passed in 2014 prevented these companies from providing this service. In 2016 article 56 that established this imposition was appealed as unconstitutional to the Supreme Court of Justice, which ruled in favour of the companies. In June 2022, the current government made the authorization effective, as a first phase of new authorizations for cable companies in the rest of the country. These companies will be able to negotiate with Antel the use of the state telephone infrastructure or invest in optical fibre rewiring to offer television and internet service. The political opposition has pointed out that this resolution weakens the state telecommunications company, Antel.

As for mobile telephony, the upward trend continued with 6,247,641 services at the end of the year: 57% correspond to Antel, 26% to Movistar and 17% to Claro. Mobile broadband subscriptions were 3,670,007 and 62% were concentrated by Antel (Ursec, 2022, p. 69). On the other hand, the number of people with a smartphone reached 2,450,000 (Radar Group, 2022) in a population of around 3,400,000 inhabitants.

According to the survey *El Perfil del Internauta Uruguayo* (Grupo Radar, 2022), the entire population lives in homes that have some type of device with internet access. 97% live in homes with a smartphone and 72% with a Smart TV. The gap in access to devices by socioeconomic status is reduced in relation to the smartphone: 95% of the low income level population have a device of this type in their home and 99% of the high income level. On the other hand, the gap increases by about thirty points when referring to Smart TVs or other types of devices. In any case, of the total equipment with internet access, the sum of smartphones and Smart TVs constitutes 60%, while only 10% corresponds to Plan Ceibal and Ibirapitá computers.

The survey reveals a 97% internet penetration, with a reduction in the access gap of two points between the highest and lowest levels. Regarding the age ranges, a growth in the last two years was observed in people over 65 years of age: nine out of ten are internet users. An increase was also found in children under five years of age: three out of four use the internet (Grupo Radar, 2022).

41% of those surveyed spend more than ten hours a day using the internet. Regarding audiovisual consumption, 69% used the internet to watch movies or series and 26% watched internet television channels. The preferred device for watching

movies or series is the Smart TV (54%), followed by the cell phone with 48%, while the preference for TV with Chromecast is 18%. The preferred social networks are Facebook and Instagram, 76% and 74% respectively; in third place is Tik Tok with 34% and Twitter dropped to 23%.

As for Digital Television (DTV), so far no single date has been established for the analog blackout. Progress has been made gradually since the first broadcasts in 2012 and there are some towns in the rest of the country where only DTV is broadcast. Meanwhile, the channels will continue to broadcast digital and analog programming in parallel⁶.

2. Analysis of the Year: National and Ibero-American premiere fiction in 2022

**TABLE 1. Premier fictions aired in 2022
(national, foreign of Obitel, and coproductions).**

PREMIER NATIONAL TITLES- 0	PREMIER FOREIGN TITLES - 14
	<p>Canal 4</p> <ol style="list-style-type: none"> 1. <i>El Secuestro de Mateo</i> (soap opera, Chile) 2. <i>Juegos de Poder</i> (soap opera, Chile) 3. <i>Oro Verde</i> (soap opera, Brazil) <p>Teledoce</p> <ol style="list-style-type: none"> 4. <i>Corazón de Madre</i> (soap opera, Brazil) 5. <i>Corran por sus Vidas</i> (soap opera, Brazil) 6. <i>Éramos Seis</i> (soap opera, Brazil) 7. <i>La Usurpadora</i> (soap opera, Mexico) 8. <i>Los Ricos también Lloran</i> (soap opera, Mexico) 9. <i>Orgullo y Pasión</i> (soap opera, Brazil) 10. <i>Rock Story</i> (soap opera, Brazil) 11. <i>Si nos Dejan</i> (soap opera, Mexico) 12. <i>Sol Naciente</i> (soap opera, Brazil) 13. <i>Solo se Vive Dos Veces</i> (soap opera, Brazil) <p>Canal 5</p> <ol style="list-style-type: none"> 14. <i>Vivir Sin Permiso</i> (series, Spain) <p>PREMIERE TITLES BROADCAST TOTAL: 14</p>

Source: Obitel Uruguay.

The number of Ibero-American premieres remained stable compared to the previous year in terms of the quantity of titles. However, it confirms the reduction that

⁶ Details of locations can be found at <https://www.gub.uy/ministerio-industria-energia-mineria/comunicacion/noticias/despliegue-television-digital>

occurred from 2020 when the drop to 16 titles, in contrast to the 27 premieres of 2019. Another relevant aspect regarding this decline in Ibero-American fiction is the total absence of premieres on Channel 10 Saeta. Teledoce continues to be the channel that broadcasts more Ibero-American fiction: ten of the fourteen premieres were broadcast on that channel. Added to this panorama is the absence of national fiction.

TABLE 2. National premiere fiction formats in 2022 and their evolution in the last five years.

Format	Titles						Hours					
	2018	2019	2020	2021	2022	Total	2018	2019	2020	2021	2022	Total
Soap opera	0	0	0	0	0	0	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00
Series	0	1	1	1	0	3	00:00:00	3:22:30	46:52:30	8:00:00	0:00:00	58:15:00
Miniseries	1	0	0	0	0	1	7:33:11	0:00:00	0:00:00	0:00:00	0:00:00	7:33:00
Sitcom	0	0	0	0	0	0	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00
Unitary	0	0	0	1	0	1	0:00:00	0:00:00	0:00:00	4:50:00	0:00:00	4:50:00
Docudrama	0	0	0	0	0	0	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00
Others	1	0	0	0	0	1	8:19:30	0:00:00	0:00:00	0:00:00	0:00:00	8:19:30
TOTAL	2	1	1	2	0	6	15:52:41	3:22:30	46:52:30	12:50:00	0:00:00	78:57:41

Source: Obitel Uruguay based on Kantar Ibope Media Uruguay data.

In the last five years, six national titles have been produced, mostly broadcast by public television networks, with a total of 78 hours and 57 minutes. In 2022 there was no national production. Financing difficulties, lack of investment from private television channels and the slow pace of the execution of the few projects result in low productivity in screen time.

TABLE 3. Premiere fiction aired in 2022: countries of origin

Country	Titles	%	Hours	%
NATIONAL (total)	0	0	0:00:00	0
OBITEL COUNTRIES (total)	14	100	770:18:00	100
Argentina	0	0	0:00:00	0
Brazil	8	57	494:16:00	64
Chile	2	14	99:00:00	13
Colombia	0	0	0:00:00	0
Ecuador	0	0	0:00:00	0
Spain	1	7	32:33:00	4
US Hispanic	0	0	0:00:00	0
Mexico	3	21	144:29:00	19
Peru	0	0	0:00:00	0
Portugal	0	0	0:00:00	0
Uruguay	0	0	0:00:00	0
Venezuela	0	0	0:00:00	0
COPRODUCTIONS (total)	0	0	0:00:00	0
National Coproductions	0	0	0:00:00	0
Obitel Countries Coproductions	0	0	0:00:00	0
TOTAL	14	100	770:18:00	100

Source: Obitel Uruguay based on Kantar Ibope Media Uruguay data.

The countries of origin of the 2022 Ibero-American titles were Brazil, Mexico⁷, Chile and Spain, with a preponderance of the former, which provided 64% of the premier hours. For the second consecutive year, the absence of Argentine television fiction premieres on national broadcast TV screens has been observed, while Chile has once again had a presence in the offer. Regarding the formats, the almost absolute predominance of the soap opera is observed (See Table 4).

In global terms, the number of hours assigned to Ibero-American fiction premieres constituted 19.46% of the total hours dedicated to fiction programming of all genres and origins, including the broadcast of films. The reduction of television fiction in the programming is also shown in the decrease in titles of Turkish origin, which had a strong presence since 2015. In 2022, six titles of that origin were offered, three less than the previous year.

⁷ The labelling of these titles as Mexican shows the complexity of the current processes of transnationalization. These are fictions from TelevisaUnivision, which is a transnational conglomerate, and are produced by W Studio, which is a binational, Mexico-USA production company.

TABLE 4. Formats of national and Ibero-American fiction exhibited in 2022

Format	Titles				Hours			
	Nationals	%	Other Obitel countries	%	Nationals	%	Other Obitel countries	%
Soap operas	0	0.0	13	92.9	0:00:00	0.0	737:45:00	95.8
Series	0	0.0	1	7.1	0:00:00	0.0	32:33:00	4.2
Miniseries	0	0.0	0	0.0	0:00:00	0.0	0:00:00	0.0
Telefilm	0	0.0	0	0.0	0:00:00	0.0	0:00:00	0.0
Unitary	0	0.0	0	0.0	0:00:00	0.0	0:00:00	0.0
Docudrama	0	0.0	0	0.0	0:00:00	0.0	0:00:00	0.0
Others	0	0.0	0	0.0	0:00:00	0.0	0:00:00	0.0
TOTAL	0	0.0	14	100	0:00	0.0	770:18:00	100

Source: Obitel Uruguay

TABLE 5. Ten most viewed titles in 2022

Title	Channel	TV Producer (Country)	Format/genre	N°of chap/ep in 2022	Time Slot	Rating	Share
1 <i>Si nos Dejan</i>	Teledoce	Televisa-Univisión	Soap opera	99	Afternoon	9.04	19.95
2 <i>Corazón de Madre</i>	Teledoce	Globo	Soap opera	52	Afternoon	7.77	19.88
3 <i>Sol Naciente</i>	Teledoce	Globo	Soap opera	125	Afternoon	6.42	16.41
4 <i>Éramos Seis</i>	Teledoce	Globo	Soap opera	50	Afternoon	5.30	15.25
5 <i>Solo se Vive Dos Veces</i>	Teledoce	Globo	Soap opera	10	Afternoon	5.07	14.6
6 <i>Rock Story</i>	Teledoce	Globo	Soap opera	115	Afternoon	4.93	13.85
7 <i>Los Ricos también Lloran</i>	Teledoce	Televisa-Univisión	Soap opera	41	Afternoon	4.81	13.97
8 <i>La Usurpadora</i>	Teledoce	Televisa-Univisión	Soap opera	13	Night	4.64	11.68
9 <i>Orgullo y Pasión</i>	Teledoce	Globo	Soap opera	81	Afternoon	4.36	12.99
10 <i>Corran por sus Vidas</i>	Teledoce	Globo	Soap opera	80	Afternoon	4.27	13.12
Total National Productions: 0			Original Foreign Scripts: 10				

Source: Obitel Uruguay based on Kantar Ibope Media Uruguay data

The ten most viewed premiere titles of the year were broadcast entirely by Teledoce and were mostly produced by Globo. Although this channel has historically led the top ten, you have to go back to 2015 to see an absolute predominance like the one shown in Table 5.

As for the *ratings*, if we compare them with those of the ten most viewed of 2021 we will observe a significant decrease. Except for the first three titles, the rest of the fictions that make up the top ten of 2022 were below six *rating* points, while the previous year the ten titles were above that level. On the other hand, unlike previous years in which some Turkish fiction reached higher *rating* values than the ten most watched of Ibero-American origin, in 2022 none surpassed the nine points of *Si nos Dejan*. The most watched Turkish soap opera was *Tierra Amarga*, with 8.40 *rating* points and 21.48 *share*. Thus, it is observed a general decrease in the volume of audience that preferred fiction, probably because of the time slot assigned to those programs.

**TABLE 6. Audience profile of the 10 most watched titles:
gender, age, socioeconomic status**

	Title	Channel	Gender %		Socioeconomic Status%				
			Women	Men	U+U-	M+	M	M-	L+L-
1	<i>Si Nos Dejan</i>	Teledoce	73.23	26.77	9.90	15.90	25.28	18.30	30.61
2	<i>Corazón De Madre</i>	Teledoce	72.61	27.39	9.61	20.00	25.63	22.78	21.98
3	<i>Sol Naciente</i>	Teledoce	67.48	32.52	9.39	15.09	24.02	21.88	29.62
4	<i>Éramos Seis</i>	Teledoce	70.28	29.72	15.20	17.10	24.16	22.47	21.06
5	<i>Solo Se Vive Dos Veces</i>	Teledoce	71.03	28.97	6.87	8.79	25.64	21.41	37.30
6	<i>Rock Story</i>	Teledoce	65.79	34.21	13.29	14.00	23.09	21.34	28.28
7	<i>Los Ricos También Lloran</i>	Teledoce	72.05	27.95	11.49	6.94	25.46	18.81	37.30
8	<i>La Usurpadora</i>	Teledoce	69.82	30.18	10.72	10.10	26.30	33.53	19.34
9	<i>Orgullo Y Pasión</i>	Teledoce	62.90	37.10	9.61	11.67	22.64	28.63	27.45
10	<i>Corran Por Sus Vidas</i>	Teledoce	68.31	31.69	17.08	9.19	28.46	22.08	23.20

	Title	Channel	Age Group %						
			4-11	12-17	18-24	25-34	35-49	50-59	60+
1	<i>Si Nos Dejan</i>	Teledoce	3.71	2.43	5.70	12.47	13.42	12.51	49.76
2	<i>Corazón De Madre</i>	Teledoce	2.34	3.36	4.07	10.83	18.80	11.58	49.02
3	<i>Sol Naciente</i>	Teledoce	3.66	2.78	5.35	16.35	15.20	14.28	42.38
4	<i>Éramos Seis</i>	Teledoce	2.69	4.24	4.02	11.05	19.93	13.95	44.12
5	<i>Solo Se Vive Dos Veces</i>	Teledoce	9.68	3.90	3.49	16.50	14.48	5.54	46.41
6	<i>Rock Story</i>	Teledoce	5.25	3.80	5.28	16.48	18.34	13.69	37.17
7	<i>Los Ricos También Lloran</i>	Teledoce	5.79	3.21	4.90	15.48	12.28	15.95	42.38
8	<i>La Usurpadora</i>	Teledoce	2.55	3.34	5.66	15.54	19.13	14.21	39.56
9	<i>Orgullo y Pasión</i>	Teledoce	4.91	4.30	5.72	17.41	14.23	17.85	35.57
10	<i>Corran Por Sus Vidas</i>	Teledoce	4.78	5.30	4.91	13.85	21.82	14.10	35.23

Source: Obitel Uruguay based on Kantar IBOPE Media Uruguay data

The structure of the audience of the ten most watched titles maintains the historical trend of an audience made up mostly of women and people over 60 years of age. The first age ranges that had slightly risen in the last two years, probably as a result of the pandemic, fell again.

Regarding socioeconomic status, the audience of these titles is mainly made up of people located in the middle and lower sectors. However, there are some specific observations that we consider relevant. In the first place, it is verified that there are some titles such as *Éramos seis* or *Corran por Sus Vidas*, with 15% of their audience in the first case and 17% in the second belonging to the two upper levels of income (U+ and U-), and the rest of their audience is distributed in similar percentages between the medium and low levels. On the other hand, *Los Ricos También Lloran*, *Solo se Vive Dos Veces* or *Si nos Dejan*, register higher percentages of their audience located in levels L+L-: 37.30% of their audience in the first two, and 30.61% in the last one corresponded to those sectors. In general terms, a greater presence of middle income sectors were observed in the structure of the audience compared to previous years.

3. 2022 VoD monitoring 2022

3.1. VoD Platforms Market in 2022

As pointed out in section 1.2, some 11 VoD platforms offering television fiction are operating in Uruguay, in addition to two AVOD platforms, all of them private and international.

Although the use of the internet and the consumption of VoD platforms have expanded, broadcast television continues to be the main source of information and entertainment in Latin America, with daily individual consumption of around four hours, while daily consumption of streaming platforms reaches 1.3 hours a day (Produ, 2023). In Uruguay, the average television viewing time was three and a half hours per day, including broadcast and pay-TV (Kantar Ibope Uruguay, 2023).

The latest report from *El Perfil del Internauta Uruguayo* showed that *streaming* platforms in Uruguay reached two million users by the end of 2022. Netflix led the ranking with more than one million users, but the growth of other platforms such as HBO Max continued, with more than 300,000, while Disney+ and Amazon Prime already exceeded 200,000 each. The survey revealed that Netflix was the favourite to watch movies with 76%, followed by YouTube with 53%, HBO Max with 17%; very close were Disney+ and Prime Video with 10%. 96% of those surveyed have installed the YouTube application on their cell phones while the presence of applications from *streaming* platforms such as Netflix (56%) and online television channels (23%) are growing (Grupo Radar, 2022).

According to the *Social Media Intelligence* report by Kantar Ibope Uruguay, the most outstanding fictions for Uruguayan audiences were HBO Max's *House of the Dragon*, Star+'s *El Encargado* and *Santa Evita*, and Netflix's *Stranger Things*. Pluto Tv appeared prominently, but at events such as the 2022 MTV MIAW Awards (Kantar Ibope Uruguay, 2023).

3.2. Offer of local VoD platforms in 2022 (national, regional within the country)

Uruguay has a state VoD platform that belongs to Antel telephone company (Antel TV) that allows free and paid access to some national and international content but does not produce its own content. In 2022, Antel signed an agreement with channels 4, 10 and 12 for which it will pay 1.2 million dollars annually, which will allow access through Antel TV to the live or on-demand transmission of those channels, but exclusively on cell phones with Antel services, excluding other devices.

Towards the end of the year, Antel's agreement with Disney was accomplished, through which the state platform offers access to Disney+ and Star+ to its clients with optical fibre or cell phones, with different costs, depending on the type of plan they have with Antel. These agreements are added to those that already provided access to Quvit TV, Spotify or Netflix.

3.3. VoD analysis in 2022: national premiere fiction and co-productions

It was not possible to report Uruguayan fiction on VoD platforms in 2022. However, it could not be said that Uruguay was completely absent from the offer of platforms such as Prime Video or HBO Max. This paradoxical statement is explained by the processes of internationalization of production that we will deal with in section 6. Series such as *Porno y Helado* and the second season of *El Presidente*, as well as *Ámsterdam* and *Sentença*, the four released in 2022, were produced in Uruguay, with independent national companies and human resources in different roles (actors, editors and various technical staff), who developed production and post-production services.

4. Interactivity and audience participation

The absence of national television fiction premieres in 2022 led us to choose one of the imported fictions for this section. As mentioned before, Teledoce has been the channel with the most programming of Ibero-American fiction premieres and broadcast all the titles that make up the *top ten*, so the soap opera *Si nos Dejan* was chosen, not only because it was the one that ranked first in the top ten, but because it was the one that showed the greatest presence in terms of interactivity and audience participation and, also, shows the strategies that the channel used in general.

Interactivity design involves defining the contact environments between the product being broadcast and the audience, implementing the mechanisms to make it visible, promoting its consumption and interaction. In the case of *Si nos Dejan*, the interactivity designed by the channel was limited to a propagation strategy⁸, based

⁸ Fechine (2013) defines propagation strategies that are articulated from contents whose statements do not depend on the action of the addressee to be completed. The author also identifies strategies that appeal to playful contents, where the recipient is invited to participate in some type of transmedia experience and other of expansion that encompass procedures that complement or go beyond the narrative universe broadcast on television (p.34).

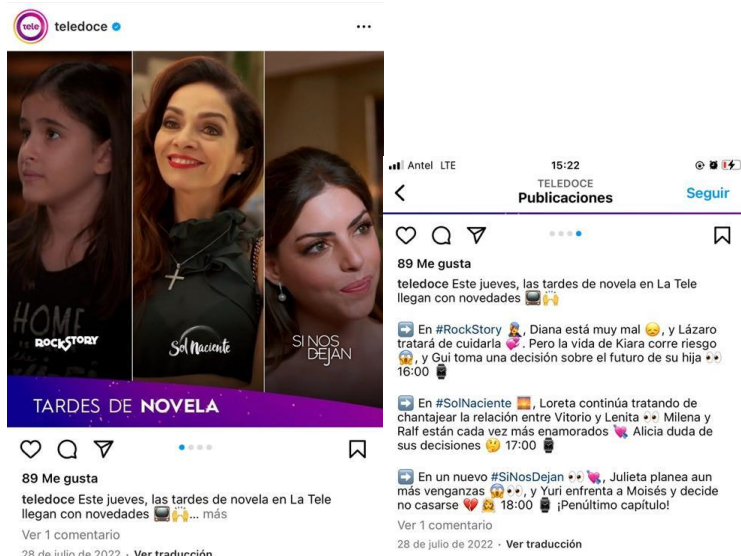
on anticipation content and recovery content of the episodes. The instruments used were the official accounts of Teledoce on Twitter, Facebook and Instagram.

The propagation strategies aim to reiterate and have an impact on the content of the series among different media and platforms. One piece of content draws attention to another, promoting a feedback loop of interest and attention, between television and the internet, which helps maintain consumer involvement in the proposed universe. However, in the case of Teledoce these contents were limited and with little diversity. On Twitter (@teledoce) and Facebook, most of the posts consisted of anticipation content and recovery content, the former encouraging people to watch the episode that was about to be broadcast or anticipating a situation, and the latter inviting people to access the episodes already broadcast on the channel's website. Some of the posts use emojis representing reactions to the narrated situation as a way to emotionally involve the viewer or emphasise the immediateness of the broadcast.



The content published on Instagram was even scarcer, compared to the other two social media networks, since the material related to the soap opera was part of the

channel strategy to install the afternoon slot as the space for the soap opera as a distinctive sign of Teledoce. Thus, a single publication *Tardes de novela* included images and anticipations of the other afternoon soap operas on the channel.



Regarding participation, all the instances had very low levels of effective interaction, which can be explained because, when it comes to calling for the creative and participatory involvement of the recipients, propagation strategies have limited potential, inciting a *like* or a comment. The greatest participation occurred on Facebook, which is consistent with the fact that it continues to be the most used social network in Uruguay, especially in the age range of the audience for this fiction. Participation was limited to *likes*, two or three comments, and few cases of sharing content. Even so, the participation is much higher than on Twitter and on Instagram (see the examples below).



5. The highlights of the year

Broadcast TV channels reaffirm their inclination to program entertainment and to invest resources in the production of this type of programs. They dedicate promotional spaces to them during commercial breaks and use the rest of their programs to create synergy in the installation of the product. For example, the central newscasts of channels 10 and 12 regularly mention as news some aspect of the shows, such as what was the identity of one of the participants of *¿Quién es la Máscara?* or what decisive instance occurs in *Got Talent*. In addition, “satellite” programs of these formats have been created, such as *Amamos el Talento* around the latter. The highlight of the year is the absolute predominance of national entertainment production in these formats by private channels.

The 2022 programs, which were added to those already installed, were *La Voz*, *¿Quién es la Máscara?* and the Uruguayan version of *Ahora Caigo*, which in its Spanish edition was on channel 10 screen for several years, even during the first months of 2022. However, not only these formats in local production occupied the central broadcast hours, but other imported programs such as the Spanish *El Desafío* or *El Hormiguero* were broadcast. But the most extreme event in this direction was the transmission of the Argentinian version of *Gran Hermano* that generated a derivative program of national production from Saeta Canal 10 -*La Previa de Gran Hermano*- in which some Uruguayan figures commented and analysed the progress of the reality show that was being broadcast in the neighbouring country. In this scenario, Ibero-American fiction has once again been relegated, and limited to afternoon and night time, after 11 pm.

When zapping broadcast television in prime time, it is difficult to find anything other than some entertainment program, whether national or imported, so that the aesthetics, the scenery, the sound, make the image on the screen very similar to the ones of many other televisions in the world. It is one of the manifestations of transnational television.

6. Theme of the year: Independent production companies and the internationalization of television fiction production in Ibero America

In Uruguay, the internationalization of television fiction production corresponds to what has been defined as a transnational media order “that is reassigning media spaces and involving new practices, flows and media products”, redefining the intertwining of the local, the national, the regional and the global (Chalaby, 2005, p.30). This new paradigm is characterised by fragmentation processes caused by the increasing number of companies that disaggregate and “outsource part or all of the production process” (Chalaby, 2016, p.37), and many times these processes

are internationalised. Thus, in the transnationalization of television, independent production companies acquired a fundamental role, both for fiction and for entertainment formats.

In the case of Uruguay, after the expansion of HBO Go, later HBO Max, Prime Video or Netflix, independent production companies carried out television fiction projects for these platforms, providing services related to filming, locations, production and post-production in general. However, these are not Uruguayan fictions, and are registered as products of Brazil, Argentina or Chile. In this section we will analyze this phenomenon, focusing on the last four years (2019-2022) and on the main production companies involved in these processes.

6.1. National structural level

In Uruguay, an independent production company is understood as a company dedicated to the production of audiovisual content for other national or international companies (television channels, platforms, advertising agencies, etc.) with which it maintains an autonomous relationship. A definition from the legislative point of view is the one offered by Law 19307 approved in 2014, which in its definitions chapter, dedicates article 3 to establish what is understood by independent production. It defines that independent production is “that carried out by a company that, not being the owner of audiovisual communication services, does not belong to or work exclusively for an owner of audiovisual communication services, and has the intellectual independence and the professional and technical capacity to produce programs with professional standards”.

In the directory of Uruguay Audiovisual⁹ 80 audiovisual production companies are registered, although it has been verified that not all of them appear in this registry. There is an organization, the Association of Film Producers and Directors of Uruguay (Asoprod, <http://asoprod.org.uy/>), created in 1994 with the purpose of promoting national fiction and documentary cinema and which brings together a good number of the producers linked to audiovisual production in recent decades, but the affiliation is personal and not that of the production companies. However, taking the Uruguay Audiovisual list as a reference, it can be observed that some production companies are mainly focused on advertising, others towards fiction or documentary films and to a lesser extent towards television fiction itself. Although in many of the production companies' websites the development of television fiction projects is announced, then no specific products are registered. In general, they are small companies that work on their own projects, sometimes in co-production or for international production companies to which they provide services, so they hire personnel in relation to the size of those projects.

⁹ <https://uruguayaudiovisual.com/directorio-empresas-instituciones/>

The initiatives to promote the internationalization of production to promote the development of the audiovisual industry led to the creation in 2016 of what was called Uruguay Audiovisual, which is the brand of the audiovisual industry in Uruguay. It was a specific development of the Uruguay Natural country brand¹⁰. Its purpose is to contribute to the development of the sector and position the country as a place for audiovisual production. It connects public institutions -Ministry of Education and Culture, Ministry of Industry and Energy, Montevideo Audiovisual (Municipality of Montevideo), Uruguay XXI¹¹- and private organizations such as Asoprod and the Business Chamber of Advertising Producers of Uruguay, which brings together all the advertising production companies in the country.

6.2. The most relevant production companies

For the survey of the internationalization of television production in Uruguay, we have taken as a reference the implementation of the Uruguay Audiovisual Program (PUA) that had its first pilot test in 2019, and which was adopted as a continuous policy from 2020. It is a program that has a national and an international line and that consists of the refund of up to 25% of the production expense made in the country (*cash rebate*), which varies according to the size of the production and has different maximum refund limits. Although before that year fictions were produced for platforms with the participation of national production companies¹², it is the implementation of the PUA as a policy, added to the one that already existed of zero VAT, which gave a boost to the development of the audiovisual industry linked to television fiction in the country. This instrument encouraged local production companies to seek major international projects that would not be possible within the restricted framework of the Uruguayan market. Although the state support of the PUA is a central factor, not all the projects accomplished in this period used it.

The companies linked to the production of television fiction for platforms are: Cimarrón Cine, Salado and La Productora Films. The fictions in which they played a leading role are detailed in the following table.

¹⁰ See <https://marcapaisuruguay.gub.uy/comenzo-el-desarrollo-de-la-marca-sectorial-audiovisual/>

¹¹ It is the agency responsible for the promotion of exports, investments and country image. It works to boost the export capacity and competitiveness of Uruguayan companies, promote the country as an attractive place for productive investments and promote the Uruguay Natural Country Brand.

¹² Such is the case of *El Hipnotizador*, released in 2015 and 2017 for HBO, with locations in Montevideo and production by Oriental Films.

Title	Release/ Situation	Platform	Production company	Origin
<i>Conquest</i>	No date	Netflix	Salado	
<i>Impuros</i>	2018, 2019, 2021 three seasons available, 4th and 5th in post- production	Prime Video/ Star+	Cimarrón	Brazil
<i>Manhãs de Setembro</i>	2021	Prime Video	Cimarrón	Brazil
<i>Dom</i>	2021	Prime Video	Cimarrón	Brazil
<i>Desjuntados en Río</i>	2021	Prime Video	Salado	Brazil
<i>Maradona: Sueño Bendito</i>	2021	Prime Video	La Productora Films	Argentina
<i>Lov3</i>	2022	Prime Video	Cimarrón	Brazil
<i>Insanía</i>	2022	Star+	Cimarrón	Brazil
<i>Iosí, el Espía Arrepentido</i>	2022 and second season in post- production.	Prime Video	Cimarrón	Argentina
<i>Ámsterdam</i>	2022	HBO Max	Cimarrón	Mexico
<i>Sentença</i>	2022	Prime Video	Cimarrón	Brazil
<i>Porno y Helado</i>	2022	Prime Video	Salado	Argentina
<i>El Presidente (2)</i>	2022	Prime Video	Salado	Chile
<i>Barrabrava</i>	Premiere scheduled for june 2023	Prime Video	Cimarrón	Argentina
<i>Cromañón</i>	In post- production	Prime Video	Cimarrón	Argentina

Source: Obitel Uruguay

Towards the end of 2019, the first project, *Conquest*, was produced with the application of the PUA incentive, which had a great impact in the local press and started a policy recognized as successful. This fiction has not been released and it is not clear what the situation is, but with it began a revitalization of the sector through the *cash rebate* instrument.

In our survey, 15 television fiction series were identified for international platforms between 2019 and 2022, some have already been released and others are in different stages of production, generally in post-production. *Impuros*, premiered its first season in 2018 for which Cimarrón provided production services; then another two seasons were released and there are two more in post-production with the same production company.

Cimarrón Cine is the production company with the greatest presence in these processes of internationalization of television fiction. Of the total of these fictions, ten received services of this production company and three of them are classified as

Cimarrón Originals. Of the rest of the titles, four involved Salado and one La Productora Films. Cimarrón and Salado have offices in Uruguay and in two other countries: in Mexico and Argentina, the first; in Puerto Rico and Argentina, the second.

The main platforms for which these production companies worked are Prime Video, HBO Max and Star+. An important part of these projects arose from the association of local production companies with regional offices of the platforms. For example, in *Sentença*, Amazon Brazil partners with Cimarrón to produce the series. In general, local production companies take the initiative in searching for projects, and associations are developed either for production or post-production services. However, in the cases of *Amsterdam*, *Sentença* and *Barrabrava*, they are originals from the Cimarrón production company (<https://cimarroncine.com/originales/>). The concept of “Original Cimarrón” for this production company implies that it strongly participated intensely in the development process of the idea and the project, before the platform acquired the intellectual property of the series¹³.

In the eyes of the viewer, these series are labelled as Brazilian, Argentine, Chilean or Mexican, however, the production was done in Uruguay, with Uruguayan human and technological resources, as well as many of the locations. Thus, stories that take place in São Paulo, such as the case of *Sentença* or *Manhãs de Setembro*, were shot in Montevideo; or the extreme case of the second season of *El Presidente* in which the action takes place in Switzerland, Africa or Rio de Janeiro and was shot without leaving Uruguay.

6.3. Some final considerations

The panorama of broadcast television in Uruguay shows different facets of internationalization: programming imports and the local production of international entertainment formats are two dimensions. As has been pointed out, 79% of the total hours of broadcasting are of national production, although this did not result in local investment for the production of television fiction. At the same time, the Uruguayan audiovisual industry has demonstrated the capacity to attract international fiction projects, although it has not yet generated its own production.

Some studies have revealed the impact of some of these productions supported by the PUA. Thus, the study by Ceres (2021) showed that the first project to which this *cash rebate* program was applied for the production of some scenes (*Conquest*), demonstrated that in an investment of 1.9 million dollars, for “every dollar an impact of 1.63 dollars was generated in the economy involving sectors other than the audiovisual industry” (p.2). Another study that analyzed two Cimarrón projects, *Sentença* and *Manhãs de Setembro Mahnas*, concluded that for each dollar of PUA reimbursement invested, 1.3 and 2.4 dollars of taxes were generated, in addition to the multiplying effect of the demand for audiovisual production services and the

¹³ Interview carried out by the author to Santiago López, May 2023.

generation of direct and indirect employment that produced “a mass of remunerations that implies multiplying by 3.1 to 5.6 times the amount invested in PUA” (CPA Ferrere, 2021). The sanitary conditions and stability of the country favoured the production of fiction projects in Uruguay for platforms during the pandemic. Activity has continued after the health emergency, although in a more competitive context.

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