

URUGUAY: NATIONAL FICTION RETURNS TO THE SCREENS¹

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

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Introduction

The Uruguayan broadcast television panorama maintained the programming trends of large international formats in prime time, in national version or retransmission of productions from other countries (such as Argentine’s *Big Brother*). Television fiction, meanwhile, continued to be displaced to the afternoon and night time slots.

The most relevant novelty was the reappearance of national fiction with the second season of the unitary *Temporario* and the first one of the comedy *Alí Sócrates*. On the other hand, the participation of Uruguayan production companies in the transnationalization processes of fiction production for VoD platforms continued, both in co-production and in production and post-production services.

1. The Uruguayan Audiovisual Context in 2023

1.1 The Uruguayan broadcast television

The broadcast television system remains stable, made up of three private and two public channels, one of them dependent on the government of the city of Montevideo, the country’s capital, and the other integrated into the national public media system.

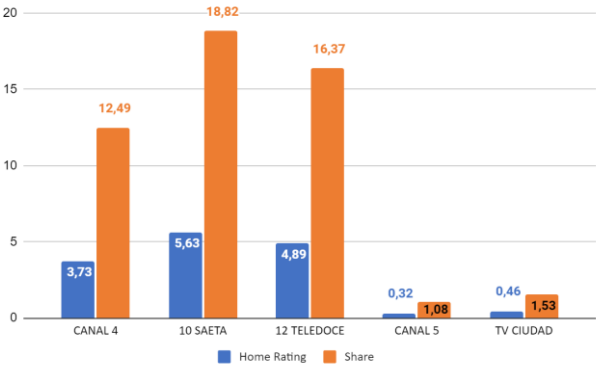
Chart 1. National broadcasting networks/channels in Uruguay

Private networks/channels (3)	Public networks/channels (2)
Canal 4 (Channel 4)	Canal 5 (Channel 5)
Saeta (Channel 10)	TV Ciudad
Teledoce (Channel 12)	
TOTAL PRIVATE CHANNELS = 3	
TOTAL PUBLIC CHANNELS = 2	

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

Graph 1. Audience and TV share by network (home rating).

Network	Home Rating	%	Share
10 SAETA	5.63	37.46	18.82
12 TELEDUCE	4.89	32.53	16.37
CANAL 4	3.73	24.82	12.49
TV CIUDAD	0.46	3.06	1.53
CANAL 5	0.32	2.13	1.08
Total:	15.03	100	50.29



Source: Kantar Ibope Media Uruguay-Obitel Uruguay

The annual audience of broadcast television in 2023 increased its *rating* by one point and its *share* by four points compared to the previous year. Graph 1 clearly shows the unbalanced performance between private and public channels in terms of capturing the audience; the historical trend of a low audience for Uruguayan public television continues. Although TV Ciudad has a slight advantage over Canal 5, it is not very significant. In commercial television, Saeta Canal 10 maintained its leadership, reaching 37.46% of the *rating*, followed by Teledoce and Canal 4, as in previous years.

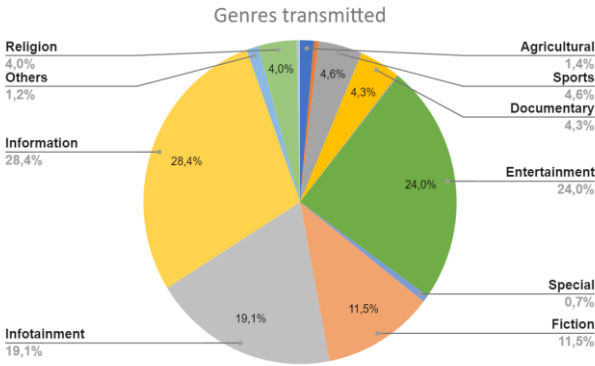
According to Kantar Ibope data, among the ten most watched programs of the year, considering the total programming, were *La Voz* (in its two versions, *La Voz Kids* and *La Voz Uruguay*), *Master Chef Celebrity* and the newscast *Subrayado*, all Saeta programs. It was followed by *¿Quién es la Máscara?*, the *Greg Mortimer* documentary, broadcast by Teledoce, and *Concentrados* on Canal 5.

Broadcast television, Kantar points out, continues to be the one that concentrated the greatest turning on in Uruguay. In second place was pay TV and 28% corresponded to streaming content. On the other hand, the average viewing time was three and a half hours a day, 67% individually and 33% co-viewing².

² <https://www.montevideo.com.uy/Negocios-y-Tendencias/Kantar-Ibope-Media-llevo-a-cabo-el-encuentro-Kimnovation-Uruguay-uc889531>

Graph 2a: Genres and hours transmitted in TV programming

Genre	Hours	%
Agricultural	461:54:00	1.43
Cultural	147:01:00	0.46
Sports	1469:13:00	4.55
Documentary	1385:43:00	4.29
Education	32:57:00	0.10
Entertainment	7748:07:00	24.01
Special	224:05:00	0.69
Fiction	3696:22:00	11.45
Infotainment	6168:58:00	19.11
Information	9150:08:00	28.35
Others	388:41:00	1.20
Religion	1295:35:00	4.01
Health	105:50:00	0.33
Total:	32274:34:01	100

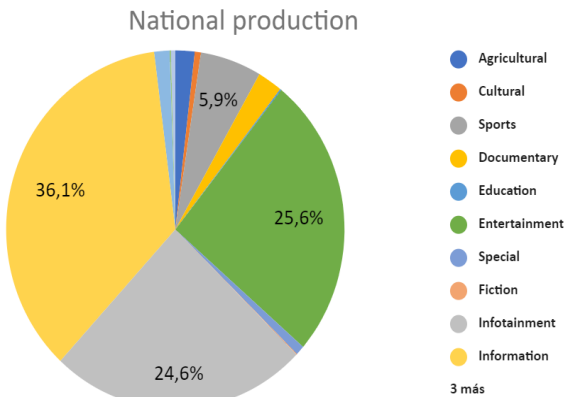


Source: Obitel Uruguay based on Kantar Ibope Media Uruguay data

The Fiction category, with 11% of screen time, ranked fourth after Information, Entertainment and Infotainment; between the three they accounted for 70% of the total broadcast hours. In recent years, there has been a constant decrease in time devoted to the fiction genre and in 2023 there was a new decrease: about 300 fewer hours were broadcast than in 2022. One of the factors that explains this loss of hours is the decrease of titles of Turkish origin, a trend that has been consolidated in the last three years: nine titles were broadcast in 2021, six in 2022 and four in 2023.

Graph 2b. Exhibited genres of national production

Genre	Hours	%
Agricultural	461:54:00	1.84
Cultural	147:01:00	0.59
Sports	1469:13:00	5.86
Documentary	594:59:00	2.37
Education	32:57:00	0.13
Entertainment	6422:54:00	25.60
Special	214:05:00	0.85
Fiction	16:50:00	0.07
Infotainment	6168:58:00	24.59
Information	9058:27:00	36.10
Others	368:08:00	1.47
Religion	30:34:00	0.12
Health	105:50:00	0.42
	25091:50:00	100



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

78% of the total screen time was occupied by nationally produced programs, composed in its greatest proportion of Information and Entertainment. The sum of both genres occupied more than 60% of the produced Uruguayan programs. Infotainment constituted almost 25%, while national fiction barely managed to occupy 16 hours and 50 minutes, 0.07% of the time devoted to national productions.

1.2. Pay TV and VoD platforms in Uruguay

Table 2 details the main pay television companies in Uruguay. In general terms, the number of services in 2023 was 496,127, which was 77,619 less than in 2022. This confirms the trend of decline that pay television has been experiencing progressively since 2016 (URSEC, 2023, p.91). The highest number of this type of television services was reached in 2015 and since then the drop has been 40% (Radar, 2023, p.7).

Chart 2. Pay TV companies³ in Uruguay

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

Source: Obitel Uruguay.

Direct TV has the largest number of services nationwide with 29%, followed by Flow with 9%, TCC with 7% and finally, Montecable and Nuevo Siglo with 6%. The region that registers the largest number of services continues to be the country’s capital, Montevideo, with 35% of the total (URSEC, 2023, p.92).

The main international SVoD platforms are Netflix, Amazon Prime, HBO Max (now Max), Flow (Cablevisión), Movistar+ (Telefónica), Claro Video (América Móvil), Disney +, Star +, Paramount+ and, exclusively dedicated to cinema, Mubi. The two national platforms are Cinemateca, which offers cinema, and Antel TV, the public platform, dependent on the State telephone company.

In March 2022, the availability of the Vix streaming platform, from the Televisa-Univision group, was announced for Uruguay. It is an AVoD service (content on demand with advertising) which is mainly made up of Televisa soap operas. This

³ This table reports pay TV companies and not networks or channels because there are no measurements of cable channels that allow identifying which are the most relevant.

platform would be added to another AVoD already operational: Pluto TV. Both function as live channels that also enable on-demand content.

1.3. Financing sources in the audiovisual sector

According to data from Kantar Ibope's Monitor Evolution, advertising investment in fiction aired on broadcast television was 1,317,691 seconds and the main advertisers were Teleshopping, L'Oréal and Unilever.

During 2023, the main instrument of support for the audiovisual industry continued to be the Uruguay Audiovisual Program (PUA), which has 12 million dollars managed by the Uruguayan Film and Audiovisual Agency (ACAU) and has several lines (national, international and advertising). The two Uruguayan fictions released on broadcast television in 2023 were supported by this program.

SeriesUy has been the only specific fund for the creation of television fiction series, but it had its last call in 2021. It was an inter-institutional fund that brought together entities dependent on the Ministry of Education and Culture (ACAU, and Channel 5), of the Ministry of Industry and Energy and the Municipality of Montevideo (Montevideo Audiovisual and TV Ciudad). Created at the end of 2016, SeriesUy, had its first winning fiction in 2017. So far, three fictions have been broadcast as a result of this program: *Todos Detrás de Momo*, released in 2018, *Metro de Montevideo*, in 2021 and *Alí Sócrates* in 2023. The last project to emerge from the 2021 call, *¿Es Amor?*, from the production company Coral, is in the process of execution.

The fund of \$5,000,000 (about 125,000 dollars) changed its bases, with different requirements in terms of number of chapters, duration of each one and execution times. The fictions would be broadcast by public media that would have the rights for a few years. The evaluation of the entities involved in the performance of the fund led to the decision to close it. Instead, a new design with a regional approach is now being considered.

In 2023, a novelty occurred when the fund of the Ministry of Industry and Energy (MIEM) devoted for commercial broadcast television channels, which transmit in digital terrestrial television (DTT) mode for the production of content, was modified to admit the application for production of international formats. The fund is \$85,000,000 and the applicant projects had to be of more than 20 million pesos, of which up to 30% is reimbursed and they must have started before December 2022. In this way, the commercial channels could receive financial support to produce entertainment formats (such as *¿Quién es la Máscara?*, *Teledoce*, *La Voz*, Canal 10, *Bake off*, Canal 4), regardless of international origin, as long as they use national resources. The initiative received criticism from the opposition party, Frente Amplio, and observation from the Court of Auditors.

1.4. Communication policies

One of the most relevant events in 2023 was the setting up of the new institutional framework of the State entity that directly deals with audiovisuals. In mid-2022, the Uruguayan Film and Audiovisual Agency (ACAU) was created, which would replace the Film and Audiovisual Institute. The ACAU concentrated some functions that were distributed to various organizations and centralized the administration of the incentive funds, among them the Uruguay Audiovisual Program (PUA).

The board of the new entity took over in January 2023, made up of a representative from the Ministry of Education and Culture, another from the Ministry of Economy, representatives of the audiovisual sector and its president, Facundo Ponce de León. During this first year, much of the work was committed to the transition from the old to the new institutionality. An Audiovisual Observatory was created and a process management system was designed. The lines of action defined by the new Agency are aimed to achieve an intersection between cultural and industrial purposes; they propose to allocate resources not only to audiovisual production, but also to three other dimensions: distribution, access and preservation. On the other hand, it is intended to strengthen the funds allocated for development to support the first creative stage of audiovisual⁴ projects.

At the Parliament, this year the discussion on a new Media Law that would repeal the current law 19,307, passed in 2014, once again gained prominence. The new law promoted by the current government eliminates the organizations created by law 19,307: the Council of Audiovisual Communication, the Honorary Advisory Commission for Audiovisual Communication (CHASCA), the Ombudsman's Office and the Honorary Advisory Council of Public Media, most of which have not been implemented since the law was passed. Other aspects that the new law would modify refer to the increase in the number of frequencies that can be concentrated in the hands of a single owner and the repeal of the fee that television channels had to pay for the use of frequencies, intended to form the Fund of Promotion of the Audiovisual Sector, although in fact successive governments exempted the channels from paying this fee. The new bill was passed by the Lower House and went to the Senate for consideration in 2024.⁵

1.5. Digital and mobile connectivity infrastructure

Fixed broadband services were 1,097,847, of which 93% corresponded to fiber optics operated by Antel, the State company that until mid-2023 maintained a monopoly on this type of technology. Since then, several cable operating companies were authorized to provide internet⁶ services. The parliamentary resolution is from 2022, but

⁴ Interview conducted by the author Rosario Sánchez with the president of ACAU, Facundo Ponce de León, on May 6, 2024.

⁵ At the end of this report, the bill had been passed with modifications by the Senate, so it must go back to the Lower House. The controversy over the changes introduced is causing problems in order to obtain the approval of this law. We will surely deal with these aspects in the chapter on Uruguay, in the next yearbook.

⁶ The central reason for granting licenses is that in this way the countryside cable companies will be helped. [ht-](#)

licenses were only granted in 2023.

Mobile telephony had a year-on-year increase in the number of services of 7.5% compared to 2022 with 6,532,569 active services of which 60% corresponded to An-tel, 23% to Movistar and 17% to Claro. Uruguay occupies fourth place in terms of mobile internet speed with 149.08 megabytes per second⁷.

According to the latest survey by *El Perfil del Internauta Uruguayo 2023*, 100% of the population lives in homes with a device with internet access, 97% with a smart-phone and 69% with Smart TV. The gap between socioeconomic levels is very small with respect to the ownership of a smartphone (93% at low levels, 98% at medium levels and 100% at high levels), but it deepens in other devices, such as notebooks, tablets and Smart TVs (Radar, 2023, p.5).

95% of the population is an internet user and 78% has Wi-Fi internet access in their homes. If the age of the users is considered, the survey shows that at the extremes of age range, Internet use continues to grow: seven out of ten children between 0 and 5 years old use the Internet and nine out of ten people over 65 years of age also do so. The average time of daily Internet use is 6.6 hours per person, and in women it is one hour higher than in men. The Internet use with highest percentages is chatting on Facebook or Whatsapp and social networks in general (96% and 84% respectively) while watching or downloading movies or series reached 58%. This last use reached rates of more than 70% between 12 and 29 years of age and decreased as age increased until reaching 40% in those over 65 years of age. As for social networks, Facebook and Instagram continue to be the favorites and in third place, much further away, Tik Tok, although together with Instagram it is the predominant one in the younger sectors (Radar, 2023).

[tps://www.elpais.com.uy/negocios/noticias/un-hito-para-los-cableoperadores-le-aprobaron-la-primera-licencia-para-que-puedan-ofrecer-internet](https://www.elpais.com.uy/negocios/noticias/un-hito-para-los-cableoperadores-le-aprobaron-la-primera-licencia-para-que-puedan-ofrecer-internet); <https://www.elobservador.com.uy/nota/once-cables-ya-recibieron-autorizacion-para-ofrecer-internet-y-dan-los-pasos-finales-para-dar-el-servicio-20238820350>.

⁷ <https://www.uruguayxxi.gub.uy/es/noticias/articulo/uruguay-se-ubico-entre-los-paises-con-mayor-velocidad-de-internet-movil-del-mundo/>

2. Analysis of the Year: national and Ibero-American fiction premieres on open TV

Table 1. Premiered Fictions Broadcast in 2023

PREMIERED NATIONAL TITLES - 2	PREMIERED FOREIGN TITLES - 14
10 Saeta	12 Teledoce
1. <i>Temporario</i> 2 (unitary)	1. <i>Café Con Aroma De Mujer</i> (soap opera-USA-Colombia)
Canal 5	2. <i>La Madrastra</i> (soap opera-Mexico)
2. <i>Alí Sócrates</i> (series)	3. <i>Los Ricos También Lloran</i> (soap opera-Mexico)
	4. <i>Más Que Una Ilusión</i> (soap opera-Brazil)
	5. <i>Orgullo y Pasión</i> (soap opera-Brazil)
	6. <i>Pantanal</i> (soap opera-Brazil)
	7. <i>Solo Confía</i> (soap opera-Brazil)
	8. <i>Solo Se Vive Dos Veces</i> (soap opera-Brazil)
	9. <i>Travesía</i> (soap opera-Brazil)
	Canal 4
	10. <i>Juegos de Poder</i> (soap opera-Chile)
	11. <i>La Ley de Baltazar</i> (soap opera-Chile)
	12. <i>Oro Verde</i> (soap opera-Brazil)
	13. <i>Tierra de Amor y Venganza</i> (soap opera-Argentina)
	Canal 5
	14. <i>Vivir sin Permiso</i> (series-Spain)
	PREMIERED TITLES TOTAL: 16

Source: Obitel Uruguay

In 2023, 16 titles were released, two more than in 2022. Teledoce continued to be the largest provider of premieres: nine of the 16 titles were offered on that channel. Meanwhile, Canal 4 continued to include Chilean fiction and is the only channel that offered Argentine fiction.

In addition to the reappearance of Argentinian fiction in the offering, the other novelty was that national fiction was released again: one title on public television, *Alí Sócrates*, and the other on Saeta Canal 10, *Temporario*. As seen in Table 2, in the last five years the presence of national fiction has oscillated between one and two titles per year, with a low volume of hours which in that period reached a total of almost 80 hours. The formats adopted have been the unitary and the series. This last format is the one that reached the greatest number of hours, 70:39.

Table 2. National fiction formats released in 2023 and their evolution in the five-year period

Format	Titles						Hours					
	2019	2020	2021	2022	2023	Total	2019	2020	2021	2022	2023	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	1	1	1	0	1	4	3:22:30	46:52:30	8:00:00	0:00:00	12:24:00	70:39:00
Miniseries	0	0	0	0	0	0	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00
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	1	0	1	2	0:00:00	0:00:00	4:50:00	0:00:00	4:26:00	9:16:00
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	0	0	0	0	0	0	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00	0:00:00
Total	1	1	2	0	2	6	3:22:30	46:52:30	12:50:00	0:00:00	16:50:00	79:55:00

Source: Obitel Uruguay based on Kantar Ibope data.

Table 3. Premiere fictions released in 2023: countries of origin

Country	Titles	%	Hours	%
NATIONAL (total)	2.00	13	16:50:00	2
OBITEL COUNTRIES (total)	14.00	88	1014:28:00	98
Argentina	1	6	130:07:00	13
Brazil	7	44	478:51:00	46
Chile	2	13	222:21:00	22
Colombia	0	0	0:00:00	0
Ecuador	0	0	0:00:00	0
Spain	1	6	30:22:00	3
USA Hispanic	0	0	0:00:00	0
Mexico	2	13	65:23:00	6
Peru	0	0	0:00:00	0
Portugal	0	0	0:00:00	0
Uruguay	2	16	16:50:00	2
Venezuela	0	0	0:00:00	0
COPRODUCTIONS (total)	1	6	87:24:00	8
National Coproductions	0	0	0:00:00	0
Obitel Countries Coproductions	1	6	87:24:00	0
TOTAL	16,00	100	1031:18:00	100

Source: Obitel Uruguay based on Kantar Ibope data.

The volume of hours of premiere fiction increased by about 300 hours compared to 2022, but it represented less than a third of the total time devoted to fiction. The two national fictions represented 2% of the total time covered by Ibero-American premieres and 13% of the titles. The offer was mainly composed of titles of Brazilian origin and the constant number of Chilean and Mexican fictions was maintained.

Argentinian fiction, which had been absent in the last two years, returned to the offer although with only one title.

In terms of formats, the soap opera dominated, representing 97% of the time dedicated to Ibero-American fiction premieres. On the other hand, the series, which had a major presence in previous years, remained the same as in 2022 with a single premiere.

Table 4. National and Obitel fiction formats shown in 2023

Format	Titles				Hours			
	Nationals	%	Obitel Rest	%	Nationals	%	Obitel Rest	%
Soap opera	0	0.0	13	93.0	0:00:00	0.0	984:06:00	97.0
Series	1	50.0	1	7.0	12:24:00	74.0	30:22:00	3.0
Miniseries	0	0.0	0	0.0	0:00:00	0.0	0:00:00	0.0
Sitcom	0	0.0	0	0.0	0:00:00	0.0	0:00:00	0.0
Unitary	1	50.0	0	0.0	4:26:00	26.0	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	2	100.0	14	100.0	16:50:00	100.0	1014:28:00	100.0

Source: Obitel Uruguay based on Kantar Ibope data.

Table 5: 10 Most watched titles in 2023

Title		Channel	Producer (Country)	Format/genre	No. of chap/ep in 2023	Time slot	Rating	Share
1	<i>Pantanal</i>	12 Teledoce	Brazil	Soap opera	83	Night	8.03	16.67
2	<i>Travesía</i>	12 Teledoce	Brazil	Soap opera	88	Afternoon	7.68	18.88
3	<i>Solo Confía</i>	12 Teledoce	Brazil	Soap opera	58	Afternoon	6.91	17.71
4	<i>Café Con Aroma De Mujer</i>	12 Teledoce	(USA-Colombia)	Soap opera	95	Afternoon	6.71	17.37
5	<i>Solo Se Vive Dos Veces</i>	12 Teledoce	Brazil	Soap opera	69	Afternoon	6.25	16.40
6	<i>Temporario 2</i>	10 Saeta	Uruguay	Unitary	8	Night	6.01	12.77
7	<i>La Madrastra</i>	12 Teledoce	Mexico	Soap opera	50	Afternoon	5.74	15.58
8	<i>Los Ricos También Lloran</i>	12 Teledoce	Mexico	Soap opera	20	Afternoon	5.26	15.86
9	<i>La Ley De Baltazar</i>	Canal 4	Chile	Soap opera	131	Night	5.06	10.52
10	<i>Más Que Una Ilusión</i>	12 Teledoce	Brazil	Soap opera	55	Afternoon	4.90	14.17
Total of national productions: 1				Original foreign scripts: 9				
10%				90%				

Source: Kantar Ibope Media Uruguay – Obitel Uruguay

Five of the titles of the ten most viewed are from Brazil, two from Mexico, one from Chile and one from Uruguay. The novelty that this table presents compared to the previous year is precisely the presence of a national fiction, the second season of *Temporario*, which obtained the sixth place. The title that achieved the highest *rating* percentage was *Pantanal*, with 8.03%, however that number is one point less than that obtained in 2022 by the soap opera that ranked first that year, that was *Si Nos Dejan*. As we had already pointed out in the previous report, the audience for Ibero-American fiction continues to decline.

Some trends that had been shown in previous reports are confirmed: the predominance of Brazilian products, the almost absence of Argentinian fiction, the dominance of soap operas and the location of these titles in the afternoon and night hours. The fiction offer was absent from prime time, which was instead occupied by entertainment formats. Finally, the most viewed titles were broadcast mainly by Teledoce: this channel, which was also the one that offered the most premieres of Ibero-American fiction, broadcast eight of the ten titles.

**Table 6: Audience profile of the 10 most watched titles:
sex, age, socioeconomic status**

Title		Channel	Sex %		Socioeconomic status%				
			Women	Men	U+U-	M+	M	M-	L+L-
1	<i>Pantanal</i>	Teledoce	57.7	42.2	15.7	13.3	16.8	23.3	30.6
2	<i>Travesía</i>	Teledoce	70.7	29.21	8.0	9.8	23.4	24.8	33.8
3	<i>Solo Confía</i>	Teledoce	68.3	31.6	6.7	8.45	24.8	27.9	32.0
4	<i>Café Con Aroma De Mujer</i>	Teledoce	68.1	31.8	10.3	10.5	21.0	26.1	32.0
5	<i>Solo Se Vive Dos Veces</i>	Teledoce	75.9	24.0	7.0	9.1	28.6	25.6	29.4
6	<i>Temporario 2</i>	Canal 10	56.7	43.2	20.6	9.5	39.3	6.2	24.3
7	<i>La Madrastra</i>	Teledoce	76.3	23.6	6.37	9.3	31.0	23.3	29.9
8	<i>Los Ricos También Lloran</i>	Teledoce	71.5	28.5	15.1	6.2	25.4	23.0	30.1
9	<i>La Ley De Baltazar</i>	Canal 4	70.4	295	24.1	8.0	21.1	30.8	15.8
10	<i>Más Que Una Ilusión</i>	Teledoce	67.3	32.6	9.5	10.9	26.6	24.3	28.5

Title		Channel	Age %						
			4-11	12-17	18-24	25-34	35-49	50-59	60+
1	<i>Pantanal</i>	Teledoce	3.2	3.2	7.1	10.4	22.5	15.6	37.6
2	<i>Travesía</i>	Teledoce	3.7	3.3	8.1	9.9	17.9	11.0	45.9
3	<i>Solo Confía</i>	Teledoce	2.7	5.6	12.4	10.5	15.6	8.7	44.1
4	<i>Café Con Aroma De Mujer</i>	Teledoce	3.8	3.8	8.0	11.7	18.3	10.2	43.9
5	<i>Solo Se Vive Dos Veces</i>	Teledoce	3.2	2.8	6.0	13.5	14.8	5.4	54.0
6	<i>Temporario 2</i>	Canal	4.3	4.8	6.1	3.8	16.4	18.8	45.6
7	<i>La Madrastra</i>	Teledoce	3.0	2.8	6.8	14.2	15.8	5.9	51.2
8	<i>Los Ricos También Lloran</i>	Teledoce	4.4	3.0	4.4	12.8	11.1	8.8	55.1
9	<i>La Ley De Baltazar</i>	Canal 4	1.4	2.7	5.0	4.1	9.7	7.9	68.8
10	<i>Más Que Una Ilusión</i>	Teledoce	4.3	2.6	7.4	17.0	15.6	8.1	44.7

Source: Obitel Uruguay based on Kantar Ibope data.

The composition of the top ten audience reveals, in general, a predominance of women in the audience and low percentages of the audience located in the high and medium-high socioeconomic levels. Especially in the Medium + level, it is the one that registered the lowest audience volume, while the percentages increased progressively between levels M to L-.

However, some significant variations are observed in some titles. Thus, it is confirmed that in *Pantanal* and *Temporario*, the percentages corresponding to women and men tend to balance, registering an increase in the number of men who watched these fictions. In the first, 57.7% of the audience were women and 42.2% men; in the second, 56.7% were women and 43.2% men, while in the rest of the titles the percentages of women exceeded those of men by more than thirty points.

Another aspect that can be observed in *Temporario's* audience is that its composition by socioeconomic level had a greater volume at the high level, 20.6%, and at the medium level, 39.3%, compared to the other titles. The connection of this fiction with the theatrical institution El Galpón that gave birth to it may be an explanatory hypothesis for this characteristic of the audience. Regarding ages, however, it follows the same trend as the rest of the titles in which the highest percentage of the audience corresponded to people over 60 years of age.

3. VoD Monitoring 2023

3.1. VoD systems market

The panorama of VoD platforms in 2023 remained unchanged compared to the previous year (see section 1.2), although according to the report *El perfil del Internauta Uruguayo 2023* (Radar, 2023), Netflix once again reduced the percentage of users to 70% , while YouTube remained at 53%, Disney and HBO at 15% and Prime at 10%. Star+ was the one that experienced the most pronounced growth, reaching 23% (p.21). The dimensions and characteristics of the market remain very opaque to the extent that there is no access to the number of users of each platform or amount of money involved.

3.2. VoD analysis in 2023

In 2023, the series *Barrabrava* was released, a co-production of Uruguay with Argentina, directed by Jesús Braceras -who was also its showrunner- and starring Matías Mayer and Gastón Pauls. The Uruguayan production company was Cimarrón Cine for Prime Video, which also provided production services for other series released in 2023, such as the second season of *Iosi, el Espía Arrepentido* or the latest seasons of *Impuros*, also on Prime.

This production company is the one with the greatest presence in the development of television and film fiction projects (as is the case of *Society of the Snow*, by Juan Antonio Bayona, made in Spain and Uruguay), but it is not the only one. The growth of Uruguay as an audiovisual hub has led to talk of a kind of “Hollywood Uruguayan-style”⁸.

TABLE 7: National fictions and co-productions released in 2023 in VoD systems

PREMIERE COPRODUCTIONS
Prime Video (1)
<i>Barrabrava</i> ⁹ (Argentina-Uruguay)
Total: 1

9

⁸<https://www.lanacion.com.ar/espectaculos/series-de-tv/producciones-en-fuga-los-actores-los-directores-y-las-tramas-son-argentinas-pero-se-filman-en-nid29092023/>; <https://www.cronista.com/apertura/empresas/uruguay-quiere-ser-el-hollywood-del-sur-seduce-a-la-industria-del-cine-con-beneficios-fiscales/>

⁹ Produced by Red Fish, Cimarrón and Amazon.

Barrabrava revolves around the conflict that grew among the hooligans of Atlético Libertad del Puerto club based on the intention of the club's leadership to sell a fundamental player to promote to the first division. A violent struggle breaks out for the leadership of the hooligans, which determines the death of its historical leader, "El Tío" and the expulsion of the Urrutia brothers, César and "El Polaco". In addition to recreating the plots of power and corruption around football, taking a fictional club as its axis, the series represents complex characters who move in a context of marginality, poverty and violence from which it seems difficult to escape. The two main characters undergo transformation processes and have trajectories in the opposite direction that come into conflict: one towards sinking, that of César, and the other towards ascent, that of "El Polaco". This character develops in a narrative arc in which he seems to be going towards a certain redemption, in impulses aimed at distancing himself from the violence of the hooligans' violence, but finally he approaches the profile of the tragic hero, subjected to fatal forces that he cannot control, to a destiny that must be fulfilled. The circle cannot be broken. The representation of marginality is presented as vital conditions in a world closed in itself and without an exit.

Finally, towards the end of 2023, the presence of Uruguayan fiction will once again be registered on the Argentinian channel UN3TV. In November, the web series *No Hay Nadie* premiered, created and directed by Joaquín Bravo, who defines this fiction as a comedy of "existential humor"¹⁰. In eight unitary episodes, of varying duration around ten minutes, the series covers everyday situations crossed by the absurd, with a narrative logic concentrated in a single location. The fiction is the result of the alliance between the production companies Básico and Puré with UN3TV.

4. Interactivity and audience participation

For the topic of this section we will deal with *Alí Sócrates*, that in terms of interactivity, has the most frequent characteristics of Uruguayan television fiction. We mean that these are projects based on personal efforts, that for several years seek to add resources from different funds and build up alliances, until they finally manage to produce the fiction and broadcast it. This determines that the call to the public is present long before the fiction takes shape, with press releases, media reports and the opening of social media accounts.

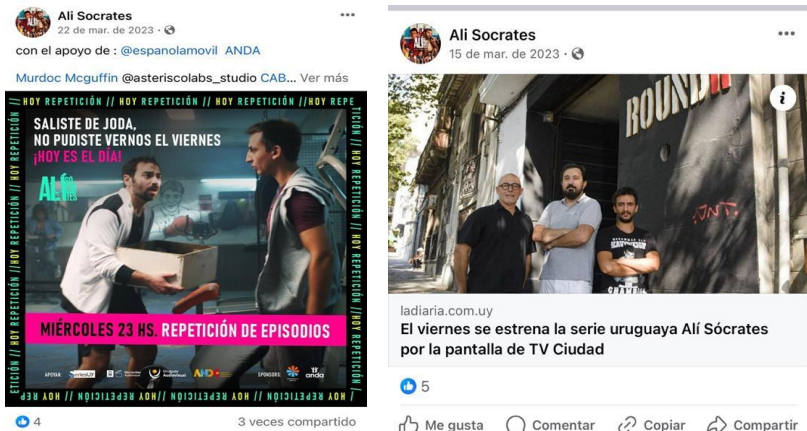
Such is the case of *Alí Sócrates*, which began to develop in 2015. At the end of that year, a pilot was recorded and it had its first presence on social networks in April 2016.

¹⁰<https://ladiaria.com.uy/cultura/articulo/2023/11/no-hay-nadie-la-serie-uruguay-que-hace-humor-des-de-una-plataforma-argentina/>



That year its Facebook and X account (then Twitter) were created in which people were invited to watch the pilot of the first chapter on a website that is no longer active and events were announced to raise funds and there were also calls for extras for the filming. The design of interactivity in social networks then had its configuration from that moment and the contents changed when the series was produced as it was a project selected by SeriesUy.

The audience engagement strategy consisted of the publishing of content on three social networks: X (@alisocratesgym), Instagram (@alisocrates) and Facebook. The propagation of content was implemented: some in advance through announcements of premieres and previews of episodes and also recovery content (fragments of scenes and announcements of episode repetitions), with the aim of keeping the public updated on past and future events. Within the framework of this strategy, informative content was produced, both contextual and promotional, which are those that seek either to expand knowledge about the diegetic universe (presentation of characters, star guests) or to provide the public with access to the extradiegetic universe (the contents of presentation of the technical team, backstage photos and press and radio notes with the directors).





The greatest flow of publications by broadcasters and public interaction occurred through Facebook. In general terms, public participation in relation to interaction with the content was low on all networks.

This performance can be explained because the contents that make up the propagation strategies, although they serve to “diversify the points of contact of consumers with the narrative universe”, have limited potential to achieve audience involvement (Fechine, et al, 2013 p .38).

5. Highlights of the Year

Broadcast television in 2023 maintained the same characteristics as the previous year: entertainment and information programs predominated, especially long news-casts. The most relevant aspect of the year was the reappearance of national fiction on the screen with two titles, *Temporario* and *Alí Sócrates*. In the first case it is the second season of a series of eight single episodes and in the second it is a comedy with a series format, also with eight chapters.

Despite the little promotion, *Temporario* was placed in sixth place in the top ten with 6 rating points, in the same place in the ranking and with the same audience capture as in its first season of 2021. This fact is quite extraordinary, in two senses: it is not common to have a second season in national television fiction and even less to repeat in the top ten.

This fiction was born from the theatrical institution El Galpón¹¹, with a long tradition in the country that, faced with the crisis caused by the pandemic situation due to the closure of theaters, partnered with the production company La Vorágine

¹¹ Founded in 1949, the institution was linked to the dense history of independent theater in Uruguay.

Films to carry out this production using the theater as a location and its acting resources. The first season of *Temporario* was the result of those efforts. It also received support from various public funds, including the PUA. As in the first season, this new chapter brought together various scriptwriters and directors. It was broadcast by Saeta Canal 10 screen, which, as noted at the beginning of this chapter, is the channel with the highest levels of audience that may have contributed to the performance of the series.

Alí Sócrates, that also announces a second season, stands out for aspects that we will analyze in the following section, but we will point out here that, unlike *Temporario*, it was broadcast on the two public television stations at different times of the year, first on TV Ciudad and then on Canal 5. The audience data was in line with the general performance of both channels: it obtained 0.52 rating and 1.06 share on TV Ciudad and 0.20 and 0.36 respectively on Canal 5. The series created by Gonzalo Durante and Sebastián Pérez Pérez, director and screenwriter, added several funds, including SeriesUy, PUA, Montevideo Audiovisual and the Cultural Incentive Fund, in addition to combining the work of several production companies: the Uruguayan Murdoc and McGuffin, together to Asterisco Labs from Argentina and Cabruja Films from Bolivia.

6. Theme of the Year

The theme of the year revolves around a broad question about the narratives in the fiction produced by each country, what their ways of narrating, their themes and characters are like. A global response in the Uruguayan case could be summarized by pointing out that in recent years the stories told in Uruguayan television fiction were presented in two formats, the series and the unitary one, and were distributed between educational fiction, comedy and drama. The six titles released in the last five years were distributed equally between these three types of narration and the spectrum of their possibilities. We will focus here on the two releases of the year, emphasizing the main features in terms of their themes, characters and narrative resources.

6.1. *Temporario*

The second season of this fiction maintains the same characteristics as the first one: a self-conclusive narrative seriality, with each episode presenting a different theme, with different characters in a story that closes in each episode. The only connecting element between the episodes that gives it the character of an anthology is the space where all the action takes place: the temporary rental apartment (Airbnb style) that

gives its name to the fiction. There are neither exteriors, nor movement to other interior settings.

The anthology nature of this fiction allows it to cover a wide range of themes: the elderly, Alzheimer's, the love encounter between older people, prejudice and fears, gender identity, sexual abuse. The format also makes it possible to use a diversity of tones, so that some episodes are clearly dramatic and others introduce humor and satire.

Thus, the episode entitled "Don't Open" presents a situation of intrafamilial sexual abuse that is revealed through suggestion, some gestures introduced progressively accompanying the discovery process made by the mother of the abused young woman. On the other hand, in "Neighbors on Alert", in a tone closer to comedy, characters satirize this type of neighborhood associations and the prejudices that define their behavior.

The narrative structure usually follows a linear temporality, except in one of the episodes in which the chronological order is altered. The secret works as a narrative engine in almost all episodes. Sometimes, as in "Inheritance", the secret articulates a narrative structure in sections organized around each of the characters, aspiring to the inheritance. The tension is sustained around a truth that each character has to reveal to access their share of an inheritance. Other times, the secret is part of the twist of the outcome, revealing a hidden identity or action. With different degrees of relevance, revelation or anagnorisis are resources used in all episodes.

6.2. *Alí Sócrates*

It is a comedy in eight episodes that focuses on the project of two friends, Santi and Gonza, who want to open a gym, but pursue different aims. Gonzalo Pacherotti is devoted to martial arts, he is a fighter, and wants the gym to be dedicated to training in these disciplines. Santi has the dream of earning a lot of money in order to win back his ex-girlfriend, Pamela, Gonzalo's sister. His actions are going to be more marketing-oriented, to include fitness activities, which are in conflict with Gonza's convictions. They have a period of five months to recover the space of an old deteriorated gym, so that the owner agrees to sign the contract. That is the goal that unites the characters: making the *Alí Sócrates* gym possible.



It is a narrative that is organized in a continuous and cumulative seriality around the obstacles that must be overcome to achieve the common objective of the two main characters. However, linked to this central plot, parallel plots develop: that of the Santi-Pamela relationship, the Gonza-Magui relationship, the plan of Donald and his henchmen.

In terms of themes, the series includes classic themes such as the pursuit of a dream, friendship or love, but also others such as bullying, the use of social networks and the phenomenon of cancellation. The situations and conflicts are presented in comedy mode, underlining the ridiculous, with caricatured situations and characters or resorting to parody which introduces a certain critical perspective. The song that identifies the series, *Superpoderes del Gym*, constitutes another original component of this fiction.

The two main characters, on the one hand, have typical traits of the canonical hero, in the sense that they pursue a desire and will have to face obstacles, but on the other hand, they have traits that distance them from a heroic dimension: they are two young men in a precarious situation, such that they must live in the gym and share the mattress to sleep on; one wants to be champion, but doesn't seem close to achieving it, the other fantasizes about winning Pamela back and refuses to see the signs of her rejection.

The secondary characters adopt either the role of auxiliaries or adversaries, but in one function or another their caricature or parody features are accentuated. The comedy is sometimes sustained by the physical presence of the character, as is the case of Mateo, who supposedly goes to the gym to train and always carries a bag of biscuits in his hand and a construction helmet on his head; other times in their gestures and actions, such as Burton's choreographies, the language in which English terms are inserted or the parody of YouTubers in the character Willy de la Gente.



The narrative structure organized around the achievement of an objective implies the presence of antagonists that generate obstacles: one is Agustín who boycotts the project and another is the gang of criminals that intends to use the gym to carry out a robbery. The false names of the band members parody Donald Duck and his three nephews, Huey, Dewey and Louie, while their clumsiness constitutes another component of the humor.

The narrative begins *in media res*: the viewer encounters images of an advertising spot, while Santi's voice-over describes it, trying to get Gonza to imagine what that advertising piece would be like, which for now is only in Santi's mind, but that the viewer can see. The aesthetics of the images refer to martial arts films, in addition to having the marks or imperfections of a running VHS tape. The illusion dissolves when the two friends appear talking in the gym and talking about what it would cost to do that promotion. In this dialogue, the differential features of the characters are defined, as well as the central narrative arc.

Although the temporal development of the story is linear, different types of temporal alterations and disruptions occur throughout the narrative. Thus, at the beginning of the second episode ellipsis is used, introducing Gonza the day after a fight that we did not see and was not announced in the previous episode. The character is only shown walking down the street with a wound on his nose as a visual clue and then references in different moments of the dialogue.

The type of use of the flashback in this fiction has the particularity that two times overlap: the present in which an action is being carried out and the past. The scenes from the past are fragmentarily embedded, like small flashes, in the development of the present action: while Santi tells Ruben, the owner of the gym, about the questionable behavior of his son Agustín, images of the action of this character are introduced. These fragments function as a contrasting counterpoint to Santi's words that reinforce the comedy tone.

Temporal anticipation is also used, but here it involves the superposition of two times: the present and the future. Thus, in the last chapter, Magui relates a plan to deceive Agustín, but while her voice narrates, her words come out of the mouths of the different characters with images of the future phases of execution of the plan.

The humorous effect arises from the contrast between the female voice and the image of Agustín gesturing Magui's words. Instead of the typical flashforward in which we return to the present, in this case the movement to the future leaves the action installed at the time of the execution of the plan.

A moment of disruption of time and space occurs in chapter 7 when Gonza mistakenly takes a drug thinking it is a paracetamol pill and begins to hallucinate. Then, the time-space of the hallucination and the action in the present of the criminals who take over the gym develop in parallel. Gonza physically shares that time and space, but a parallel dream world moves that is visually marked with a treatment of the color and strokes of the image as if it were an animation. In this parallel world the heroic action of the character operates in rescuing his lady, with parodic allusions to this topic, which are added to others such as the reference to the Ninja Turtles.



One of the particularities of this fiction regarding the breaking of narrative linearity is the incorporation of small sections that are added after the end credits. These fragments, with the VHS aesthetic, sometimes parody a movie, but starring one of the characters the youtuber Willy de la gente or the advertisement for an exercise method to lose weight. In addition to these small pieces, each chapter is linked to the parody of question and answer programs. With the titles and header that announce the program *If you don't know, call*, the viewer may think that it is an independent program, but the host immediately appears on the scene and summons one of the characters of the series as a participant.

In conclusion both fictions have a thematic spectrum linked to current concerns and with characters from an average social profile, which could lead to broad identification. From the point of view of narrative resources, the comedy showed a broader and infrequent range of resources in the Uruguayan fictions that we have studied within the framework of Obitel.

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