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CHILE: THE YEAR WE STAYED HOME¹

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Introduction

Were it not for the arrival of the COVID-19 pandemic, it is probably that Chilean television (TV) during 2020 would have been marked by the social demonstrations and political events occurred in early October, 2019. In the weeks following the beginning of the outbreak, low advertising activity was notorious. Given the perplexity caused by the events, advertisers withdrew their advertisements. The social and political facts were so significant that the advertising messages could not be longer the same, but to adjust them would probably have been understood as frivolity or opportunism. Silence was the answer. Demon-

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strations were expected to be back in force in March, after the arrival of summer, but instead the pandemic came along.

As it happened in almost all the countries, efforts to fight the pandemic implied serious restrictions to individual mobility, and many were forced to stay, for long periods, at home, with no possibility of going out to work, study or just to entertain. The presence of a greater number of people at home increased the necessity and the availability of time to consume audiovisual contents. Open TV as well as pay TV audiences, that had been declining, grew; pay TV subscriptions stopped dropping and subscriptions to video on demand (VOD) services increased. The growth of home fixed internet doubled while the growth of mobile connections accelerated, and data traffic tripled in comparison to the previous year. Excepting cinemas, all the screen were on.

However, as consumption increased during 2020, the production collapsed. National fiction premier dropped nearly by half due to the production difficulties imposed by sanitarian restrictions, and reruns of national productions already exhibited characterized the screen of open TV.

1. The context of audiovisual services in Chile in 2020

1.1 Open television in Chile

Chart 1: National open television channels in Chile

Private broadcast / channel (6)	Public broadcast / channel (1)
Canal 13: Grupo Luksic (chilean)	TVN, just with advertising financing
Chilevisión: Viacom CBS[1].	
La Red: Grupo Albavisión.	
Mega: Grupo Bethia (chilean), Discovery Communications (27.5%)	
Telecanal: Owned by Alfa Tres, (vinculado a Albavisión).	
TV+: Media 23 (chilean), P. Universidad Católica de Valparaíso.	
CHANNEL TOTAL= 7	

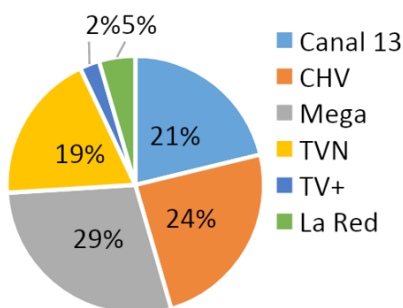
Source: Obitel Chile

The economic performance of main TV channels during 2020 were dissimilar. Both, channel 13 and TVN, which had sustained losses of US\$9 million y US\$17 million, respectively, in 2019, managed to have positive figures in 2020 as a consequence of substantial restructuring efforts and cost reductions. Channel 13 made profits for US\$9 million and TVN for US\$1.1 million. TVN case was particularly significant, because this company had been having losses since 2013, and risked to be intervened and transformed into a public channel.

Different were the cases of CHV and Mega. The latter ended the year with losses of around US\$6.7 million that, added to those from 2019, US\$23 million, and the negative figures accumulated since 2013, showed how frustrate the Chilean experience has been for Warner Media, from the purchase of the company until its sale. While, Mega had losses for US\$4 million, but even worse, it started to have losses after continuously deteriorating financial results since 2016.

Graph 1. TV share and rating by channel in 2020³

Channel	Home Rating (%)	Total TV Share (%)	Open TV Share (%)
Canal 13	5,2	13,1	21,2
CHV	6	14,9	24,3
Mega	7	17,6	28,5
TVN	4,7	11,7	18,9
TV+	0,6	1,5	2,5
La Red	1,1	2,8	4,6
Telecanal[1]	n/d	n/d	n/d
Total open TV	24,6	61,6	-
Total pay TV	15,3	38,4	-
Open TV + pay TV	39,9	100	100



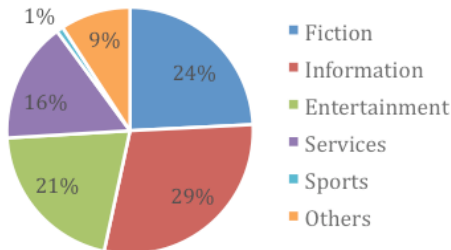
Source: Kantar IBOPE Media Chile – OBITEL Chile

3 Home rating measured 24 hours daily, regardless of channels transmission schedules.

Mega continues to hold the audience leadership conquered in 2014, but it was the only one of the four main channels that decreased its audience results. Considering those four channels as a total, Mega reached its greater share in 2017 with a 37%, and since then its participation has been decreasing until it reached 31% in 2020. This company is still the leader by far, even though both its market participation and its profits have dropped. Other channels have maintained their positions.

Graph 2. Television genres and hours broadcast by TV programming in 2020.

Genres broadcasts	Hours of broadcasting ¹	% Time	% Audience
Fiction	10.980:00	24,2%	38,8%
News	13.235:55	29,2%	31,3%
Shows	9.381:45	20,7%	8,8%
Services	7.184:15	15,8%	6,2%
Sports	402:10	0,9%	0,5%
Others	4.177:10	9,2%	14,3%
Total ²	45.361:15	100%	100%



Source: Kantar IBOPE Media Chile – OBITEL Chile

Even though at the aggregate level screen time and consumption preferences tend to be relatively steady, the effect of the pandemic resulted in an increase of screen time dedicated to news, while audiences' preferences for fiction remained the same. The latter may be construed having in mind that all sources of alternative audiovisual contents that grew in 2020, such as platforms or pay TV, are basically orientated to fiction. During this year, the total of displayed or exhibited hours on open TV dropped to 922 compared to 2019, and although all the categories experimented decreases, the number of hours dedicated to news increased up to 534.

1.2 Pay TV and VOD platforms in Chile

Chart 2. Chilean pay TV Networks

The ten most viewed pay TV channels in Chile			
Channel	Genre	Origen	Home Rating
24 Horas	News	Chile	0,72
Fox Channel	Fiction	Foreign	0,68
Cartoon Network	Children	Foreign	0,67
Discovery Kids	Children	Foreign	0,53
CNN Chile	News	Chile	0,47
TNT	Fiction	Foreign	0,45
Disney Channel	Children	Foreign	0,41
AXN	Fiction	Foreign	0,40
Disney Junior	Children	Foreign	0,35
Discovery H&H	News	Foreign	0,35

Source: Kantar IBOPE Media Chile

Chart 3: VOD platforms in Chile

Main VOD active platforms in 2020
Five most popular platforms for those who have at least one subscription: Netflix, Prime Video, HBO, Disney +, CDF Estadio
VOD from cable operators: Movistar Play, VTR+, Claro Video, Entel Go, DirecTV Go
Other popular platforms: Apple TV, Onda Media, 13Now, Cining, Punto Ticket, CNTV Play

Source: for the five most popular, Streaming Studio in Chile from Jelly Agency; the rest, OBITEL Chile

1.3 Independent TV fiction production companies

During the last great economic crisis in Chile, the *Subprime* crisis, in 2008 and 2009, most of the main TV independent production companies, such as Cine Cien, Roos Film, Nueva Imagen, Cubo Negro, Buen Puerto, Cinembargo, Calypso, among others, had to close down. The reason for this is that production companies are usually organizations with little working capital and dependent on the continuity of their projects. The industry has become more sophisticated and main production companies now, such as Parox, DDRío, AGTV or Fábula TV, are better structured and diversified. But, the suspension and postponement of projects during 2020 and 2021 have strongly reduced the production volume, and it could be possible that some of these companies or other of lesser size find it difficult to remain in business.

1.4 Funding sources of the audiovisual sector

Advertising investment is still the main source of funding of open TV, despite its ongoing decline as investment target, as well as

fiction TV. Pay TV, which has other sources of funding, is not relevant for this matter since this TV does not produce any fiction in Chile.

Until September, advertising investment in open TV had a similar behavior compared to 2018, but during the last quarter of 2019, which traditionally is the time of strongest revenues, this investment dropped as a consequence of the social convulsions that started in Chile in October. Advertising investment remained about flat in January 2020, and in February, when it seemed to start recovery, the Covid-19 pandemic arrived and negatively impacted on it, and the investment started to fall again until April.

From May, it started a slow recovery, and it was just in September when it could recover levels compared to those of 2018. Nevertheless, advertising investment in open TV ended 2020 in US\$227 million, which represents 20% less of the investment inflows recorded in 2019, 36% less than those registered in 2018 and 63% less than the investment in 2011, when it reached its all-time high (AAM, 2021 y ACHAP, 2012). In other words, open TV and fiction TV are being financed from resources similar to those of 2000, and this happens in a period when Chile's GDP per capital has tripled.

Unlike advertising resources, funds from the National Council on Television (CNTV), which main goal is to promote a quality television in different formats, had a significant increase of 45% regarding the previous year, reaching the sum of \$4.585 million. However, despite the increase, this fund represents just 2,5% of advertising resources, thus it cannot compensate the decline in open TV budget.

New funding sources for fiction are expecting from VOD platforms. Although the cases are sporadic, the four Chilean series released on Prime Video in 2020, being two of them co-productions, show this to be an emerging but feasible path for developing national fiction series.

1.5 Communication policies

The closure of schools due to the Covid-19 pandemic and the consequent presence of children at home revealed something that has been dragged on for years: the reduction of TV programs specifically for children in Chilean TV. According to data prepared for Obitel previous reports, the sum of animated series and education and instructional programs signified 1,3% of the screen time in 2019. A decade before, in 2009, this figure represented 9,4%. This is due to the nearly disappearance of animated series.

Pay TV offers different content options for kid's entertainment, but few of them have an educational purpose; therefore, houses with or without pay TV were equally affected by the lack of an education component. The answer to this problem was the creation of the TV signal *TV Educa Chile* launched on April 27, 2020. This is an educational experience jointly promoted by TV channels and supported by the CNTV and the Ministry of Education, as well as other collaborators who made available to this TV signal their contents at no cost. Contents were broadcast through multiple ways: streaming channels, digital TV signal from the main open TV channels and many pay TV operators.

This experience motivated the projection of other initiatives. Based on a study made in 2019, the CNTV (CNTV, 2019) identified a shortcoming of programs for older adults, although they represent a population group with more time for consumption. This lack was highlighted during the lockdown caused by the pandemic. In September 2020, the launching of a new signal for older adults in 2021, *TV Mayor*, aimed at filling educational and services information for this specific population, was announced by the CNTV. *TV Mayor*, if it is actually created, will not be the first segmented channel but the

first far reaching with a greater ambitious program. There is already an experience initiated in 2020, Vitalidad TV, but restricted to a geographical area. The channel is operated by the cable TV company Mundo, with a presence in regions like Valparaíso and Los Ríos. The creation of TV Mayor has been announced, but no progress on the project have been reported.

As it was mentioned before, one of the transmission ways of TV Educa Chile was the digital TV even though its full implementation is far from complete. According to the digital terrestrial television (TDT) law enacted in 2014 by then president Michelle Bachelet, the analogue blackout should have happened in 2020, but in 2019 TV channels managed to postpone it until 2024. If this deadline is met, 15 years will have passed since the definition of the norm to be used in Chile (ISBD-Tb) and its full implementation.

1.6 Digital and mobile connectivity infrastructure

Quarantines, confinements and circulation restrictions increased people needs for internet connections from homes, whether to study, to work or to entertain. This meant a rise of 13% in houses with a fixed internet connection and, at the same time, a fall of 6% in business internet connections. This increase in home connections almost tripled previous year's growth, and 2020 ended with approximately 58% of houses with a fixed connection to internet (Subtel, 2021b). The growth of fixed connection was accompanied by, from March, a rise of 64% in data traffic in comparison to the previous year (Subtel, 2021d).

Even if growth proved to be lower than in fixed connection, 3G and 4G mobile, which represent 99% of the total mobile connections, increased in 7% between December 2019 and December 2020, reaching a rate of 104,7 connections per 100 inhabitants (Subtel, 2021c) and an increase in data traffic of 40%.

2. Analysis of the Year: Chilean and Ibero-American premier fiction

Table 1. Fictions exhibited in 2020 (national, imported, premiers, reruns and co-productions)

UNRELEASED NATIONAL TITLES- 12
Channel 13
1. <i>Amor a la Catalán</i> (telenovela)
2. <i>Helga y Flora</i> (serie)
3. <i>Los Carcamales</i> (serie)
CHV
4. <i>Gemelas Idénticas en Nada</i> (telenovela)
5. <i>Héroes Invisibles</i> (miniserie)
Mega
6. <i>100 Días para Enamorarse</i> (telenovela)
7. <i>Dignidad</i> (serie)
8. <i>Historias de Cuarentena</i> (series)
9. <i>Verdades Ocultas</i> (telenovela)
10. <i>Yo Soy Lorenzo</i> (telenovela)
TVN
11. <i>Berko, el Arte de Callar</i> (series)
12. <i>La Jauría</i> (serie)
UNRELEASED FOREIGN TITLES - 13
Channel 13
1. <i>Luis Miguel La Serie</i> (series-USA Hispanic)
CHV
2. <i>Jesús</i> (telenovela-Brazil)
Mega
3. <i>El Otro Lado del Paraíso</i> (telenovela-Brazil)
4. <i>Nuevo Sol</i> (telenovela-Brazil)
5. <i>Orgullo y Pasión</i> (telenovela-Brazil)
TV+
6. <i>Pecado Mortal</i> (telenovela-Brazil)
7. <i>La Bruja</i> (telenovela-Colombia)
8. <i>Decisiones</i> (Unitary- USA Hispanic)
9. <i>Raphael de Spain</i> (miniseries-Spain)

La Red

10. *Cita a Ciegas* (telenovela-Mexico)
11. *La Rosa de Guadalupe* (series-Mexico)
12. *Rosario Tijeras* (telenovela-Mexico)
13. *Vencer el Miedo* (telenovela-Mexico)

NACIONAL RERUNS - 31

Canal 13

1. *Brujas* (telenovela)
2. *Irreversible* (series)
3. *Los 80: más que una moda* (series)
4. *Machos* (telenovela)
5. *Pacto de Sangre* (telenovela)
6. *Papi Ricky* (telenovela)
7. *Soltera otra vez* (telenovela)

CHV

8. *Lo que Callamos las Mujeres* (Unitary)

Mega

9. *Amanda* (telenovela)
10. *Eres mi Tesoro* (telenovela)
11. *Isla Paraíso* (telenovela)
12. *Papá a la Deriva* (telenovela)
13. *Perdona Nuestros Pecados* (telenovela)
14. *Pituca sin Lucas* (telenovela)
15. *Pobre Gallo* (telenovela)
16. *Señores Papis* (telenovela)
17. *Te Doy la Vida* (telenovela)

TVN

18. *Aquelarre* (telenovela)
19. *Aquí Mando Yo* (telenovela)
20. *Cuentos Chilenos* (telefilm)
21. *Dama y Obrero* (telenovela)
22. *Dónde Está Elisa* (telenovela)
23. *El Circo de las Montini* (telenovela)
24. *El Día Menos Pensado* (docudrama)
25. *La Canción de tu Vida* (series)
26. *La Chúcaro* (telenovela)
27. *Mea Culpa* (docudrama)

TV+

28. *Familia Moderna* (series)
29. *Infieles* (series)
30. *Los Años Dorados* (sitcom)

La Red

31. *Tira* (series)

FOREING RERUNS

Canal 13

1. *Pablo Escobar el Patrón del Mal* (series-Colombia)

CHV

2. *Victoria* (telenovela-México)

Mega

3. *Insensato Corazón* (telenovela-Brazil)

TVN

4. *José de Egipto* (telenovela-Brazil)
5. *Moisés los 10 Mandamientos* (telenovela-Brazil)
6. *El Chavo del Ocho* (sitcom-Mexico)

TV+

7. *El Secretario* (telenovela-Colombia)
8. *Decisiones* (Unitary- USA Hispanic)
9. *Marte* (serie- USA Hispanic)
10. *Tierra de Reyes* (telenovela- USA Hispanic)
11. *Cuenta Atrás* (series-Spain)

La Red

12. *La Esclava Blanca* (telenovela-Colombia)
13. *Águila Roja* (series-Spain)
14. *Hay Alguien Ahí* (series-Spain)
15. *Caer en Tentación* (telenovela- Mexico)
16. *Como Dice el Dicho* (series- Mexico)
17. *El Chapulín Colorado* (sitcom- Mexico)
18. *Esta Historia me Suena* (series-Mexico)
19. *Mujer Casos de la Vida Real* (docudrama-Mexico)

TOTAL UNRELEASED TITLES: 25

TOAL RERUNS: 50

TOTAL BROADCAST TITLES: 75

From its appearance in 2014, Turkish TV fiction is a necessary piece of information to understand Chilean TV panorama. Both, for its role in TV programming and for its consumption forms, Turkish fiction is almost indistinguishable from Ibero-American TV fiction, and it is broadcast by five TV channels. Moreover, in terms of TV fiction premiere, the importance of Turkish fiction is greater than any from other market player. In terms of time, it is equivalent to 61% of national and Ibero-American hours premiere, and in terms of audience, it represents 60% of the total audience reached by these two players.

But beyond the significance and persistence of Turkish phenomenon, the relevant fact of 2020, and specifically from March, was the impact of COVID-19 pandemic on TV production, programming and consumption.

Data from table 1 can illustrate the changes occurred between 2019 and 2020: the exhibition of national premieres was reduced from 17 to 12 titles, and just 5 of them were telenovelas that started its broadcasting in 2019; the rest were shorter duration formats. However, the presence of national fiction on the screen far from diminishing increased. The reruns of titles moved from 9 in 2019 to 31 in 2020.

At the Ibero-American level, although the number of titles premiere was slightly lower than 2019 (13 versus 14), reruns experienced an almost explosive increase, similar to the national case, by moving from 11 titles in 2019 to 19 in 2020.

Table 2. Fiction premiere: Countries of origin

Country	Titles	%	Chapters/ Episodes	%	Hours	%
NATIONAL (total)	12	48,0	504	35,5	274:00	27,6
OBITEL COUNTRIES (total)	13	52,0	914	64,5	719:50	72,4
Argentina	0	0,0	0	0,0	0:00	0,0
Brazil	5	20,0	451	31,8	349:50	35,2
Chile	12	48,0	504	35,5	274:00	27,6
Colombia	1	4,0	36	2,5	31:20	3,2
Ecuador	0	0,0	0	0,0	0:00	0,0
Spain	1	4,0	3	0,2	3:00	0,3
EE.UU. Hispano	2	8,0	11	0,8	7:50	0,8
Mexico	4	16,0	413	29,1	327:55	33,0
Peru	0	0,0	0	0,0	0:00	0,0
Portugal	0	0,0	0	0,0	0:00	0,0
Uruguay	0	0,0	0	0,0	0:00	0,0
Venezuela	0	0,0	0	0,0	0:00	0,0
COPRODUCTIONS (Total)	0	0,0	0	0,0	0:00	0,0
National co-productions	0	0,0	0	0,0	0:00	0,0
Obitel countries co-productions	0	0,0	0	0,0	0:00	0,0
GRAND TOTAL	25	100,0	1.418	100,0	993:55	100,0

Source: Kantar IBOPE Media Chile – OBITEL Chile

Table 2 shows Ibero-American fiction TV premiere broadcast in 2020. For a completed vision, data from Turkish fiction TV broadcast during the same period must be considered: 7 titles, 725 episodes and 556 hours. This fact cannot be omitted because it far exceeds, in screen time, figures from any country from the region. Although, the broadcast of Turkish titles is spread over different TV time, except morning, it differs from national and Ibero-American in being less concentrated in prime time (30%), and a bigger proportion is intended to be broadcast during afternoons and evenings, resulting in a majority participation of Turkish titles during evening hours.

Focusing in Obitel environment, the drop of fiction premiere is the greatest seen since the beginning of this yearbook: both, the

number of episodes broadcast in 2020 and the number of transmission hours represented 56% of the behavior of these variables during 2019. Only Brazil achieved to increase its fiction premiere, but it grew from a relatively low base. Indeed, Brazilian titles went from 2 to 5, its episodes grew by 94% and the number of transmitted hours by 62%. Mexico represented the opposite case: number of titles, episodes and transmission hours decreased in 40%, 49% and 45%, respectively, compared to 2019. Just one title, *La Rosa de Guadalupe*, represented almost 25% of the general episodes and hours transmitted in 2020.

Table 3. Chilean and Ibero-American fiction formats

Format	National						Ibero-Americans					
	Titles	%	C/E	%	H	%	Titles	%	C/E	%	H	%
Telenovela	5	41,7	435	86,3	224:55	82,1	9	69,2	795	87,0	632:00	87,8
Series	6	50,0	65	12,9	44:35	16,3	1	7,7	5	0,5	3:50	0,5
Miniseries	1	8,3	4	0,8	4:30	1,6	1	7,7	3	0,3	3:00	0,4
Telefilm	0	0,0	0	0,0	0:00	0,0	0	0,0	0	0,0	0:00	0,0
Unitary	0	0,0	0	0,0	0:00	0,0	2	15,4	111	12,1	81:05	11,3
Docudrama	0	0,0	0	0,0	0:00	0,0	0	0,0	0	0,0	0:00	0,0
Others	0	0,0	0	0,0	0:00	0,0	0	0,0	0	0,0	0:00	0,0
Total	12	100,0	504	100,0	274:00	100,0	13	100,0	914	100,0	719:50	100,0

Source: Kantar IBOPE Media Chile - OBITEL Chile

Table 3 shows that national fiction premiere in all formats, except *telenovela*, did not change significantly. It can be attributed to the fact that production and exhibition times for series and mini-series are longer than those for *telenovelas*, thus the effects of suspension on film shooting are more lagging. But, being *telenovela* the predominant genre in Chilean fiction, that even in a low production year represented 82% of screen time, it is understandable that a drop in this format will impact the overall figures. Indeed, the number of broadcast hours for national *telenovelas* premier decreased by 67% regarding 2019.

Even if 2020 is not a good year to establish trends, the absence of other formats has been observed during the last year, and it seems that the exploration of new TV formats does not include fiction. Options for this format seems to be, according to the interest of creators, on stream platforms.

Table 4. The ten top titles

	Title	Channel	Producer company	Format/genre	No. of chap/ep in 2020	Time slot	Rating	Share
1	<i>Verdades Ocultas</i> *	Mega	Chilefilms (CL)	Telenovela/Drama	152**	Afternoon	19,4	53,8
2	<i>Yo Soy Lorenzo</i> *	Mega	Mega (CL)	Telenovela/Musical comedy	95**	Prime time	17,0	40,9
3	<i>100 Días para Enamorarse</i> *	Mega	Mega + DDRío Studios (CL)	Telenovela/ Musical comedy	86**	Prime time	15,8	35,3
4	<i>Historias de Cuarentena</i> *	Mega	Mega (CL)	Serie/Drama	36**	Prime time	11,4	28,4
5	<i>El Otro Lado del Paraíso</i>	Mega	Globo (BR)	Telenovela/Drama	22**	Afternoon	10,7	38,4
6	<i>Nuevo Sol</i>	Mega	Globo (BR)	Telenovela/Drama	127**	Afternoon	10,4	31,4
7	<i>Los Carcamales</i> *	Canal 13	Kuarzo (CL)	Serie/Comedy	1**	Prime time	9,8	23,7
8	<i>Gemelas Idénticas en Nada</i> *	CHV	Parox (CL)	Telenovela/Drama comedy	73**	Prime time	9,6	21,7
9	<i>La Jauría</i> *	TVN	Fábula (CL), Fremantle (UK), Kapow (AR)	Series/Drama	8	Prime time	9,3	21,0
10	<i>Héroes Invisibles</i> ¹ *	CHV	Parox (CL), Kaiho Republic (FI), Yleisradio (FI)	Miniseries/Drama	4	Prime time	9,0	23,5
Total national productions: 8				Foreign Original Scripts: 5				

Source: Kantar IBOPE Media Chile – OBITEL Chile

(*): national production, (**): Emission started in 2019 or was deleted to 2021

Although 2020 represented a constraint to the exhibition of national titles premiere, it seems that national fiction has recovered the local public preferences. Prior to the Turkish appearance in TV, only exceptionally a foreign title managed to be in the top ten. Then, the industry entered into a deep crisis, and national production was partially displaced by Ibero-American fiction. However, since 2017, eight out

of the top ten titles are national productions. It is important to mention that the last title of the list in table 3 corresponds to a Chilean and Finnish co-production.

Moreover, if Turkish titles were included in this list, three *telenovelas* from that country would be part of the top ten, displacing three national titles.

Table 4a. The ten top national titles

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4	<i>Historias de Cuarentena</i>	Mega	Mega (CL)	Serie/Drama	36*	Prime time	11,4	28,4
5	<i>Los Carcamales</i>	Canal 13	Kuarzo (CL)	Serie/Comedy	1*	Prime time	9,8	23,7
6	<i>Gemelas Idénticas en Nada</i>	CHV	Parox (CL)	Telenovela/Drama comedy	73*	Prime time	9,6	21,7
7	<i>La Jauría</i>	TVN	Fábula (CL), Fremantle (UK), Kapow (AR)	Series/Drama	8	Prime time	9,3	21,0
8	<i>Héroes Invisibles</i>	CHV	Parox (CL), Kaiho Republic (FI), Yleisradio (FI)	Miniseries/Drama	4	Prime time	9,0	23,5
9	<i>Helga y Flora</i>	Canal 13	Suricato (CL)	Series/Drama	10	Night	5,9	18,4
10	<i>Amor a la Catalán</i>	Canal 13	AGTV (CL)	Telenovela/Drama comedy	29*	Prime time	5,8	14,3
Total nacional productions: 10				Foreign Original Scripts: 3				

Source: Kantar IBOPE Media Chile – OBITEL Chile

(*): Emission started in 2019 or was deleted to 2021

Players are the main reason for the recovery of national predominance. Before Turkish irruption, the main players were Canal 13 and TVN. After the recovery, the absolute predominance corresponds to Mega, which obtained the first four places of the list in table 4a. Two

productions from Canal 13 got in the national top ten list, but their audience levels are significantly lower than those from the original table.

It is important to highlight that the only title from TVN in the top ten list, *La Jauría*, does not correspond to a traditional production in its dramatic area, but to an Amazon co-production, released almost simultaneously on that platform and on open TV.

Table 5. Audience profiles of the top ten titles: sex, age, socio-economical levels

	Titles	Channel	Gender %		Socioeconomic level %			
			Female	Male	ABC1	C2	C3	D
1	<i>Verdades Ocultas</i>	Mega	68	32	6	15	23	56
2	<i>Yo Soy Lorenzo</i>	Mega	62	38	5	16	25	54
3	<i>100 Días para Enamorarse</i>	Mega	59	41	8	15	25	52
4	<i>Historias de Cuarentena</i>	Mega	60	40	9	14	27	51
5	<i>El Otro Lado del Paraíso</i>	Mega	68	32	4	17	26	53
6	<i>Nuevo Sol</i>	Mega	65	35	4	15	24	57
7	<i>Los Carcamales</i>	Canal 13	65	35	10	35	16	40
8	<i>Gemelas Idénticas en Nada</i>	CHV	63	37	7	20	30	43
9	<i>La Jauría</i>	TVN	61	39	6	8	27	58
10	<i>Héroes Invisibles</i>	CHV	49	51	10	16	29	45

	Titles	Age groups %						
		04-12	13-17	18-24	25-34	35-49	50-64	65-+
1	<i>Verdades Ocultas</i>	4	3	6	16	19	21	30
2	<i>Yo Soy Lorenzo</i>	6	3	7	16	21	21	25
3	<i>100 Días para Enamorarse</i>	5	4	8	15	26	22	20
4	<i>Historias de Cuarentena</i>	6	3	9	16	26	25	14
5	<i>El Otro Lado del Paraíso</i>	4	4	7	13	19	26	28
6	<i>Nuevo Sol</i>	4	3	6	14	21	20	32
7	<i>Los Carcamales</i>	2	4	2	15	29	24	23
8	<i>Gemelas Idénticas en Nada</i>	4	3	6	13	28	21	24
9	<i>La Jauría</i>	2	2	3	8	19	29	38
10	<i>Héroes Invisibles</i>	0	1	9	9	25	29	26

Source: Kantar IBOPE Media Chile, OBITEL Chile

Standard behaviors from the audience profiles of the 2020 top ten list are verified: the audience from the most viewed TV fiction is mainly female, despite the fact these programs are broadcast when the whole family is at home, and this is particularly significant considering that during 2020, due to the confinements caused by the pandemic, there was a greater presence of all the members of the family in the home. The notable exception to this pattern was the Chilean-Finnish production *Héroes Invisibles*, whose main audience was male in a proportion superior to that from total population.

3. Monitoring VOD 2020

3.1. VOD platform market

2020 represents an anomaly in relation to the gradually growth experimented by VOD platforms during the years prior to COVID-19 pandemic. Indeed, quarantines and mobility restrictions, imposed by national authorities in direct response to this pandemic, forced people to stay at home, and this fact encouraged a higher consumption of VOD platforms.

Netflix is the most popular platform, and was the first to reach a significant presence of all the VOD services offered in Chile⁴. A study published in January 2021 indicated that from the group of people subscribed to streaming services, 41,9% had just one subscription, 30,1% had two, 15,4% three and 3,3% has cancelled the subscription⁵.

4 The study Chile 3D from GfK Adimark identified that Netflix had a home penetration of 35% in 2018 (report from September, 2018) and of 51% in 2020 (report from May, 2020).

5 Streaming in Chile: the battle to come, done by the Agency Jelly. Available in <https://www.jelly.cl/streaming-en-chile/>

The same study shows that Netflix is the VOD platforms preferred by the group already mentioned, it is present in 88,7% of Chilean homes, followed by Prime Video (40%), Disney+ (23,3%), HBO GO (17,6%), CDF Estadio (8,1%) and others (11,3%). It is important to highlight that Disney+, which reached the third place, was just launched in August, 2020.

3.2. VOD analysis in 2020: national and Ibero-American fiction premiere

Table 6. Ibero-America and national fictions screened on VOD systems in 2020

National titles premiere (2)	14. <i>Secreto Bien Guardado</i> (serie - Argentina)
Prime Video	15. <i>3%</i> (serie - Brasil)
01. <i>El Presidente</i> (series - Chile)	16. <i>Buenos Días Verónica</i> (serie - Brasil)
02. <i>La Jauría</i> (series - Chile)	17. <i>Coisa Mais Linda</i> (serie - Brasil)
Ibero-American titles premiere (56)	18. <i>El Reto del Beso</i> (serie - Brasil)
Prime Video	19. <i>Espectros</i> (serie -Brasil)
01. <i>Caronte</i> (series - Spain)	20. <i>Omnisciente</i> (serie - Brasil)
02. <i>Desaparecidos</i> (series - Spain)	21. <i>Reality Z</i> (serie - Brasil)
03. <i>El Cid</i> (series - Spain)	22. <i>Amar y Vivir</i> (serie - Colombia)
04. <i>Pequeñas Coincidencias</i> (series - Spain)	23. <i>Chichipatos</i> (serie - Colombia)
05. <i>Backdoor</i> (series - Mexico)	24. <i>El Robo del Siglo</i> (serie - Colombia)
06. <i>Cómo Sobrevivir Soltero</i> (series - Mexico)	25. <i>La Reina de Indias y el Conquistador</i> (serie - Colombia)
07. <i>De Brutus, Nada</i> (series - Mexico)	26. <i>La Reina del Flow</i> (telenovela - Colombia)
08. <i>El Candidato</i> (series - Mexico)	27. <i>La Venganza de Analía</i> (serie - Colombia)
09. <i>Pan y Circo</i> (series - Mexico)	28. <i>Siempre Bruja</i> (serie - Colombia)
Claro	29. <i>100 Días para Enamorarnos</i> (serie - EE.UU. hispanos)
10. <i>Hijos de su Madre</i> (series - Mexico)	30. <i>Enemigo Íntimo</i> (serie - EE.UU. Hispanos)
11. <i>R</i> (series - Mexico)	31. <i>Esta mierda me supera</i> (serie - EE.UU. Hispanos)
Netflix	
12. <i>Casi Feliz</i> (serie - Argentina)	
13. <i>Puerta 7</i> (serie - Argentina)	

Ibero-American titles premiere (cont.)	
32. <i>Falsa Identidad</i> (telenovela - USA)	52. <i>La Casa de las Flores</i> (serie - México)
33. <i>No Te Puedes Esconder</i> (series - USA)	53. <i>La Piloto</i> (serie - México)
34. <i>El Desorden que Dejas</i> (series - Spain)	54. <i>Monarca</i> (serie - México)
35. <i>El Sabor de las Margaritas</i> (miniserie - España)	55. <i>Narcos México</i> (serie - México)
36. <i>Elite</i> (series - Spain)	56. <i>Oscuro Deseo</i> (serie - México)
37. <i>La Casa de Papel</i> (series - Spain)	
38. <i>La Valla</i> (series - Spain)	Coproducciones de estreno (6)
39. <i>Las Chicas del Cable</i> (series - Spain)	Prime Video
40. <i>Los Favoritos de Midas</i> (miniseries - Spain)	01. <i>Dignidad</i> (serie - Chile, Alemania)
41. <i>Perdida</i> (series - Spain)	02. <i>Inés del Alma Mía</i> (serie - España y Chile)
42. <i>Toy Boy</i> (series - Spain)	Movistar
43. <i>Valeria</i> (series - Spain)	03. <i>Dime Quién Soy</i>
44. <i>Vis a Vis</i> (series - Spain)	(serie - España y EE.UU. Hispanos)
45. <i>Vivir Sin Permiso</i> (series - Spain)	Netflix
46. <i>Bolívar</i> (telenovela - Mexico)	04. <i>Selena: la serie</i>
47. <i>Control Z</i> (series - Mexico)	(serie - México, EE.UU. Hispanos)
48. <i>Desenfrenadas</i> (series - Mexico)	05. <i>Alguien tiene que Morir</i>
49. <i>Diablero</i> (series - Mexico)	(miniserie - España, México)
50. <i>El Dragón: El Regreso de un Guerrero</i>	06. <i>White Lines</i> (serie - España, RU)
(serie - México)	
51. <i>Historia de un Crimen: La Búsqueda</i>	GRAND TOTAL: 64
(miniserie - México)	

Source: *Obitel Chile*

At the beginning, the presence of Latin American productions on VOD platforms was limited to titles already broadcast on TV or shown in cinemas, but the number of titles especially produced for these platforms or in alliance with TV channels has grown. In the case of Chile, it is important to mention that four national titles included in table 6 are Prime Video productions and two are co-production with other countries.

Even though, it cannot be categorized as a serial fiction, it is important to mention that in 2020 Chile released its first film on Netflix, *Nadie Sabe que Estoy Aquí*, which was produced exclusively for that platform.

Table 7. Fiction premiere on VOD in 2020 by country of origin

Country	Titles	%
NATIONAL (total)	4	6%
OBITEL COUNTRIES(total)	60	94%
Argentina	3	5%
Brazil	7	11%
Chile	2	3%
Colombia	7	11%
Ecuador	0	0%
Spain	16	25%
USA Hispanic	5	8%
Mexico	18	28%
Peru	0	0%
Portugal	0	0%
Uruguay	0	0%
Venezuela	0	0%
CO-PRODUCTIONS (Total)	6	9%
National Co-productions	2	3%
Obitel countries Co-productions	4	6%
GRAND TOTAL	64	100%

Source: Obitel Chile

The pandemic attributed a new role to VOD platforms different from TV fiction: not to compete with but to replace cinemas. The closure of cinemas prevented the release of dozens of films. After the initial confusion, it was realized that the closures would be for a long time. Both, film distributors and cinemas had to create mechanisms to keep the industry working and to find an income source different to ticket sell.

Likewise, they look for a way for creators to release their works already done. For this purpose, platforms different from those that required subscriptions and with a business model based on pay per view were created. In Chile, these options were offered by Cining and Punto Play, and on them 34 films were premiered, faced to the impossibility of their release in cinemas: *Algunas Bestias*, *Álvaro: Rockstars Don't Wet the Bed*, *Amukan*, *Camila Moreno: Pangea*, *Consuegros*, *Distancia Social*, *El Agente Topo*, *El Negro*, *El Origen del Cielo*, *El Príncipe*, *El Sabio de la Tribu*, *El Viaje Espacial*, *El Viejo del Poncho*, *Enigma*, *Esto es Spitfire!*, *Harley Queen*, *Haydee y el Pez Volador*, *Historia de mi Nombre*, *La Casa*, *La Cordillera de los Sueños*, *Lina de Lima*, *Los Jaivas: Todos Juntos*, *Matar a Pinochet*, *Mientes*, *Mi Norte es el Sur*, *Nona*, *Si Me Mojan*, *Yo los Quemo*, *Nunca Subí El Provincia*, *Parío y Críao*, *Piola*, *Santiago – Italia*, *Sobre los Muertos*, *Sumergida*, *Tengo Miedo Torero*, *Vendrá la Muerte and Tendrá tus Ojos*. Although it is true that these titles are not serial fiction, their forced appearance reveal changes in the relation between the public and the VOD platforms.

4. Fiction and audience's participation in digital environment

From the mid '90 of last century to the first decade of this one, *telenovelas* from the public channel, TVN, led the audience and are remembered by those who, during those years, gathered as a family in front of the TV, after school or returning from work. These maybe were the last years when *telenovelas* also had a time function in Chilean TV viewers' day.

Telenovelas were preceded by magazines that prepared audiences to "close the day" and, then they, in turn, delivered to prime time

news the highest ratings. During the pandemic, the repeat of several productions was not limited to free-to-air reception, analogical or digital, but also to web platforms from some channels. National Television of Chile took advantages of this situation to make available a dozen of titles from that time: Oro Verde (1997), Estúpido Cupido (1994), Romané (2000), Rompecorazón (1994), La Fiera (1999), Amores de Mercado (2001), El Circo de las Montini (2002) y Cómplices (2006), among others (El Contraste, 2021).

In 2017, the public station opened a YouTube channel called *Teleseries y series / TVN* and, at the time this report was prepared, had more than 751 million visualizations. It is not an exclusive initiative emerged from the pandemic, and, when the number of interactions generated by the channel in the section Community are counted, it is evident that it is not an organic strategy to reach new audiences and to interact with them: in 2019 and 2020 just 17 messages were sent to YouTube channel's subscribers. In any case, the 11 messages published in 2020 announcing new titles on the channel doubled the frequency from the two previous years. Series and *telenovelas* are organized by playlist, but each video also has direct access, facilitated by a nomenclature including title, number and title of the episode and the year. This information is also visually included in the image *thumbnail*.

The resto of Chilean open TV channels does not have a YouTube channel exclusive to its fiction production. While it may be possible to have access to some titles, they are mixed up with other kind of programs like morning-time slot and comedy shows. This is the case of Mega, unlike TVN, its YouTube channel presents a higher interaction with the audience in the section Community. In this segment, it encourages people to subscribe and promotes exclusive programs for its members. As TVN, thumbnails of the videos from Mega YouTube

channel show the *telenovela* isotype and typographically the chapter number. Both take one third of the image, and this suggest the channel strategy to promote the access to its fiction contents online through the home and video section.

The resto of national open TV channels is different. Their YouTube channels are just used to promote their fiction contents. In the case of Chilevisión, there is just access to some programs based on franchises such as *La divina comida* o *Yo soy Chile*. On the contrary, Channel 13 includes posters promoting the new prime time *telenovela* and it has its own channel dedicated to the station file production, called RecTV, where segments from old *telenovelas* can be found. However, as it happens in other countries, it is possible to have access to national fiction through individual accounts not linked to any production company or to the rightsholders channel.

5. Highlights of the year: the case of Stories of Quarantine

Historias de Cuarentena has been selected as the highlight of this year, because it has been designed and produced during a year, 2020, marked by the Covid-19 pandemic, and it managed to be among the ten most watched titles of the year.

In order to examine *Historias de Cuarentena* a narratological analysis has been made, as well as interviews to five TV agents related to its production. Their names and careers are described in the following table.

Table 8. Interviewees for the analysis of *Historias de Cuarentena*

NAMES	POSITION IN <i>Historias de Cuarentena</i>	ROLE IN THE TV INDUSTRY
Daniela De Micheli	Executive producer	Producer renowned for her large experience , noted for her work on <i>La Fiera y Papá a la deriva</i> , among others.
Nicolás Alemparte	Main director	Director of several <i>telenovelas</i> such as <i>Aquí Mando Yo</i> and <i>Perdona Nuestros Pecados</i> , among others
María Eugenia Rencoret	General Director of Dramatic Area, MEGA	Director and Executive in charge of the Dramatic Area in both Mega and TVN. Noted for her work in <i>Amores de Mercado</i> and <i>Vuelve Temprano</i> , among others.
Rodrigo Cuevas	Script Chief	Script writer of successful shows as <i>Los 80</i> and <i>Sres. Papis</i> .
José Fonseca	Co-script writer	<i>Telenovela</i> script writer from channel 13, TVN, Chilevisión and Mega. Noted by his work in <i>Isla Paraíso</i> and <i>Yo Soy Lorenzo</i> .

Source: *Obitel Chile*

Rodrigo Cuevas' idea was conceived taking into account the production conditions resulting from the pandemic's crisis, and it was brought into being instinctively. "In March, the sanitarian crisis and the pandemic were starting, and the true is that I started getting a little anxious creatively speaking. I was working on a TV series to broadcast in 2021, and the feeling of lack of reality became heavier. And it was in this context, thinking about "what can be done" under these circumstances that the idea appeared". It was thanked to the pandemic that this kind of product was broadcast, so

There was a big necessity to contribute based on the experience we were going through and to keep generating contents. That's how I came

up with this project, which probably otherwise would not have never been broadcast on open TV (Cuevas, 2020).

María Eugenia Rencoret maintains that *Historias de Cuarentena* was conceived thinking about the need to keep the connection with the “audience’s emotions in [those] difficult moments, focusing the content on the contingency, and giving the depth of the dialogues the character of leading role. On the other hand, Daniela de Micheli specified a practical and concrete need “of doing a new content for Mega, a contemporary one, that people will identify with”.

The plot was quickly structured and the project was born with “a contingency calling”, instead of being based on a big love story. This meant eliminating the coherence around the love story, which was developed in a superficial way, and changing the traditional nature of support roles; now they were neither connected to each other or associated to the love story of the leader roles.

The key issue was that all the stories “were connected, in a high percentage, to the pandemic, without caring that later one could find some conflicts closed to the pandemic” (Alemparte, 2020). This way, plots, usually a priori defined, had to be done in process, because even if there was a concrete argument related to some characters, “news events, with the support from journalistic research”, were an important source to develop the stories.

Unlike traditional *telenovelas* format that usually has between 90 and 120 chapter already written, broadcast according to TV programs decisions, *Historias de Cuarentena* just had 36 chapters, broadcast between April, 20 and July, 1. This required the dramatic arc of the fleeting love story to be developed more expeditious and with few conflicts, and distance and confinement became the main antagonists instead of villains.

The previous statement can be probed by disaggregating the 36 chapters. Topic emerged in the world as well as in Chile, such as the sociological impact of the pandemic (Pizarro, 2020), intra-family violence (Gámez, 2020), elderly (Azaret, 2020) and crisis of couples (Pais, 2020) were addressed in the first 12 chapters.

At the time of creating the characters and the fiction, they were very, very determinant and very decisive (...) Besides the lead characters, we had to incorporate others that enabled us to address other issues that were emerging (Cuevas, 2020).

This can be seen all through the second group of chapters, where the closure of stories involving support characters gave way to different topics and to a new couple. A story about a woman reporting her husband for domestic violence is also closed.

The third part presents more touching breakdowns related to the love story, when the leader couple visualizes a possible date after the lockdown is over, ending the story with a hope note. It should be noted that the pandemic did not just affect the creative and narrative areas, it also affected the ways of productions. The shootings took place.

Just before the broadcast, because we needed the reality to nourish the stories (...) thus characters could be close as possible to reality (Alemparte, 2020).

Additionally, the shootings had to be done through zoom, and actors had to record from homes and then send the recordings for edition.

At the beginning, I took over of all technical aspects, of how we could do it, how we were going to shoot, which format we were going to use and how the broadcast was going to be (...) Not only we had to shoot but also edit, musicalize...and all that; more of less the same thing that need to be done for a TV series, had to be done for *Historias de Cuarentena*. (Alemparte, 2020).

6. Theme of the Year: effects of the pandemic on the creation, production and narrative of *telenovelas* in Chile⁶

Since the sanitarian crisis brook out in Chile, the pandemic resonated in different spaces, and social distancing implied the closures of many spaces, organizations and entities in order to avoid contagion. Chilean TV industry was particularly affected not just for the impossibility of physically connecting with actors and actresses, but also because, due to reduced capacity, it was not possible to put the necessary crew together for producing and shooting contents, not including the limitations screenwriters had to face in terms of creation and wiring. The recording studios of the most attractive channel for fiction production, Mega, stopped the shooting on March 18, 2020, leaving some *telenovelas* unfinished, as was the case with *Yo Soy Lorenzo* or ceasing the recording for an indefinite time, as it happened to *Verdades Ocultas*.

6 The information was obtained from interviews done to people working for the production, script, direction and *telenovelas* acting areas. At their request, their names are not included.

This is how Chilean fiction fell into a crisis affecting the most important audiovisual product in Latin America: *telenovela*. While Chilean screens kept repeating old *telenovelas* and imported TV productions, new products were scarce. In 2020, 31 national productions and 11 foreign productions were rebroadcast. National ones included *telenovelas*, series and *Unitary*, and some had more than 15 years. *Telenovelas* continued to be the most watched program from the programming grid (Reyes, 2020), and several referent people from the industry attributed this fact to the audience's necessity of holding up in familiar stories that would help in moments of uncertainty and anxiety (Tapia y Reyes, 2020).

However, the clear lack of new contents was noticed. This encouraged the creation of a *telenovela* explicitly linked to the reality and to the news events, complying with all the highest production standards for a *telenovela*: *Historias de Cuarentena: psicología online*.

The lack of new contents and the faster consumption of all the contents in the programming grid accelerated the creative process that usually lasts months and culminates in the creation of a "bible", based on an argument structured around a love story (Sepúlveda, 2003). In the case of *Historias de Cuarentena* this path changed, and the axis of a *telenovela's* argument, which is usually integrated by four matrices from the classical melodrama -desire/impediment, inter social classes, disregard/recognition, civilization/barbarism (Fuenzalida, Corro & Mujica, 2009) – was omitted to produce a hybrid between series and *telenovela*.

Later, when the sanitarian measures were eased, the shooting of new premieres as *Demente*, which has been written in 2019, and *Edificio Corona*, a *telenovela* with some comic interludes that takes place in a building during the pandemic, restarted

In order to protect TV workers some protocols were implemented, including COVID-19 tests (PCR) every 72 hours, temperature reading during shooting, the supply of mask on the arrival and for re-change and alcohol gel dispensers. The masks have to be worn during all the rehearsals; they can only be removed for the shooting. All these procedures are undertaken by medical staff who is always present.

The capacity of rooms for costumes, make-up and hairstyles is limited in order to guarantee social distance. Workers from those areas have to use protection masks and other special accessories to avoid contact. Additionally, each actor needs to have his own makeup case and other personal materials cannot be mixed.

Sets are frequently sanitized. In parallel, all staff members have to go out for air, and on their return, they need to go through the sanitizing procedures again.

Even if all these procedures have implied a higher spending of time, people interviewed agreed on how these requirements have been properly internalized, and complete the work on expected time has been possible. Shooting schedules became shorter to avoid long contacts.

In general, people interviewed positively valued the implementation of all these procedures. They feel safer and, in consequence, they are willing to continue despite all. It is important to take into consideration the economic instability of employees from the culture sector, who have particularly suffered as a result of limitations imposed by the pandemic.

From the audiovisual fiction point of view, protocols implied less changes. Intimate and kisses scenes were reduced to their minimum expression. Just those essential for the dramatic plot are recorded, and are scheduled for the day after the medical tests. Something similar happen to crowded scenes. Outdoor and nights recordings have been reduced according to quarantine protocols and curfew implemented in different parts of the city.

This has involved scrips changes since what has been written was not authorized to be recorded. Some interviewees considered this limitation a minor problem, but for others was a very complex issue. Nevertheless, all agreed that the works have been well received by the public as it has been reflected in rating levels.

This success is attributed to the ability to reflect the reality and the difficulties caused by the pandemic on fiction productions. In the case of *Edificio Corona* this has be done incorporating tender and comedy moments, besides the fears associated to the pandemic context. Until the writing of this article no COVID-19 case related to shooting has been reported.

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