CHILE: THE SILENT DISAPPEARANCE OF IBERO-AMERICAN FICTION[1]

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Introduction

In 2025, the first full year of digital terrestrial television operations, Chilean broadcast television confirmed its economic and editorial decline in the area of fiction programming. Nationally broadcast channels accumulated losses totaling US$17 million, with the public channel on the brink of insolvency and only Mega maintaining a regular output of fiction programming. The quantity of new telenovelas was reduced to six titles, all from Mega, and a single Ibero-American premiere, while Turkish fiction, with eleven titles, established itself as the dominant alternative on free-to-air television. The refuge for national and Ibero-American fiction was the rerun of successful titles from past decades.

In *streaming*, the domestic offering is concentrated on Mega's telenovelas available on Mega Go, shown simultaneously with the free-to-air broadcast; the only Chilean premieres for international platforms were *Baby Bandito* Season 2 (Netflix) and *Sin Frenos* (Prime Video), both from Fábula. Canal 13, TVN, and Mega introduced a new trend by producing vertical dramas for social media, which are revitalizing domestic fiction through a digital lens. The theme of the year focuses on the women behind the scenes in Ibero-American fiction.

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1. Audiovisual Context of Chile in 2025

1.1 Free-to-air television in Chile

Table 1. National Free-to-Air Television Channels in Chile[3]

Private Channels (5)	**Public channels (2)**
Canal 13: Luksic Group (Chilean). Chilevisión (CHV): Vytal Group (Argentine/Chilean). Mega: Bethia Group (Chilean) La Red: Albavisión Group. TV+: Media 23 (Chilean, 90%), Pontifical Catholic University of Valparaíso (10%).	Televisión Nacional de Chile (TVN), funded by advertising. UChile TV: University of Chile
Total number of channels with national reach: 7	

Source: Obitel Chile.

In late 2025, Chilevisión, the second-most-watched channel, was sold by Paramount as part of a divestment process involving free-to-air television in Latin America. The buyer was Vytal Group, formed shortly before the purchase by Argentine Tomás Yankelevich along with Chilean partners. In March 2026, Vytal Group acquired Latina TV Perú, thereby adding a second free-to-air television channel to its portfolio.

The acquisition took place at a time when broadcast television was going through a difficult period. The advertising-supported channels—the main ones being all those listed in Table 1, excluding the University of Chile's channel, as well as La Red and Telecanal—collectively posted losses of US$17 million in 2025, similar to those in 2024, but with the relief that advertising spending did not continue to decline, at least in nominal pesos (see Section 1.3). The composition of the results did change, due in large part to the transfer of the Viña del Mar Festival—and its losses—from Canal 13 and TVN to Mega.

Nevertheless, Mega remained the only private channel to turn a profit, though its profits fell from US$ 13.1 million in 2024 to US$ 5.1 million in 2025. The decline was attributed not only to the Viña del Mar Festival but also to rising production costs for telenovelas, among other factors (CMF, n.d.), as well as to the establishment of Global Content, its international subsidiary aimed at projecting

[3] As an operational definition, a "nationally broadcast channel" is defined as the primary broadcast signal of a channel whose coverage exceeds 80% of the country's population. The University of Chile's channel does not meet this criterion. Technically, it is the second broadcast signal under Chilevisión's license, but the two channels are editorially independent. It is not mentioned elsewhere in this chapter because it rarely airs television dramas, and when it does, they are not new episodes.

the holding company's production capacity (telenovelas and *reality shows*) internationally through third-party production, co-productions with *streaming* platforms, and format distribution. Its main asset is a 20,000-square-meter hub on the outskirts of Lima, which opened in August 2025.

Canal 13 and Chilevisión reduced their losses. TVN also reduced its losses but accounted for 16 of the US$17 million lost by the industry (section 1.4). TV+ is also facing a difficult situation, and its financial costs are beginning to rise due to the need for liquidity.

The Albavisión Group's channels, Telecanal and La Red, accumulated losses of US$71 million over the previous seven years. This year, they managed to contain those losses thanks to non-operating income.[4]

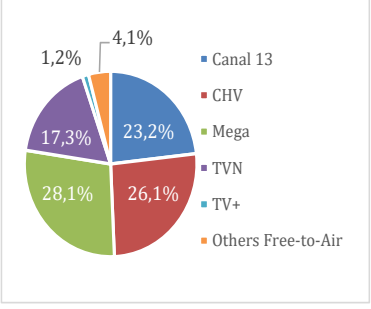
Another significant development for the Chilean television industry is the change in its audience measurement system. The *People Meter* was introduced in 1992, and after decades of gradual adjustments, the changes that Ibope Chile implemented in April 2025 were far-reaching. The sample was expanded in size (1,100 households) and geographic coverage (96% of Chile's urban population), and the segmentation in GSE and age classifications was modified; however, the most significant change was its transformation into a *cross-media* measurement system. Using the same sample, it now measures platform consumption within the household. Furthermore, the results for both consumption areas are presented using the same metric—thousands of people—and *ratings* are no longer used in day-to-day operations. This facilitates direct comparisons not only between television and streaming platforms but also with other media, and especially social media.[5] The initial measurements helped dispel a myth: people have not abandoned television. Patricia Novoa, TVN's Manager of Data and Strategic Analysis, states that, within the household, only 3.8% of people watch *streaming* platforms exclusively (Anda, 2026).

[4] At the close of this chapter, Telecanal's license had expired due to failure to meet the required coverage and broadcast start dates.

[5] The change in the measurement method also affected this article. The measurement samples differ between the first quarter and the rest of the year.

Graph 1. TV *Ratings and Share* by Network in 2025[6]

Channel	Household Rating (%)	Total TV Share (%)	Share of Free-to-Air TV (%)
Canal 13	4.2	16.7	22.1
CHV	4.7	18.8	24.9
Mega	5.1	20.2	26.7
TVN	3.1	12.5	16.5
TV+	0.2	0.9	1.1
Other Free-to-Air TV	0.7	3.0	3.9
Total Free-to-Air TV	**18.0**	**72.1**	**-**
Pay TV	**5.3**	**21.4**	**-**
Total Pay TV and Free-to-Air TV	**23.3**	**100.0**	**100**



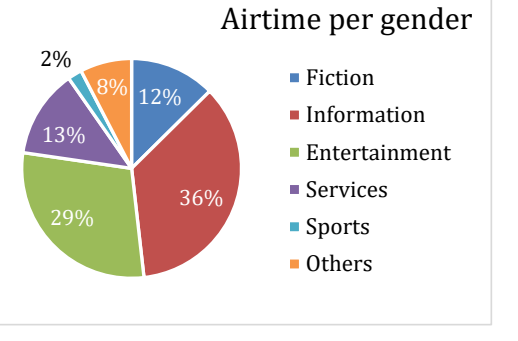
Source: Ibope Chile – OBITEL Chile.

The changes in measurement described above affect Figure 1. It shows both the previous standard, applied in the first quarter, and the new standard, applied for the rest of the year. The picture is very similar to that of 2024, with a 5% decline in the overall audience for free-to-air TV and a 12% decline for pay TV. While these changes represent a slowdown in the trend seen in previous years, it is not possible to determine whether this is a result of the sample's expanded geographic coverage.

Chart 2. Genres and Time Slots in TV Programming in 202 5[7]

Genres Broadcast	Hours of airtime	% of Airtime	% Audience
Drama	5,514:27	12.6%	14.6%
News	15589:56	35.6%	39.1%
Entertainment	12,743:20	29.1%	25.2%
Service	5,692:04	13.0%	18.0%
Sports	916:08	2.1%	2.8%
Other	3,330:56	7.6%	0.3%
Total [8]	43,786:51	100%	100%

Source: Ibope Chile – OBITEL Chile.



[6] Figure 1 shows the average viewership figures for the 24 hours of the day.
[7] Graph 2 includes the same channels as Table 1, with the exception of UChile.
[8] This table includes the primary signals of free-to-air television channels with national reach, excluding La Red and Telecanal, which are not included in the audience measurement system.

The most notable finding in Figure 2 is the decline in the proportion of programming time devoted to fiction. The 12.6% figure for 2025 was 18.4% in 2024 and 20.6% in 2023, with measuring the same channels in all three cases. Conversely, the genres that have grown the most are news and, within entertainment, game shows and celebrity news.

1.2 Pay TV in 202 5

Pay-TV subscription levels have fallen by 23% from their all-time high in 2017: from 3,294,954 subscribers at that time to 2,546,543 in December 2025. However, this overall figure masks opposing trends. Cable TV, which accounted for 50% of pay-TV subscribers in 2017, not only weathered the decline but actually grew: by 2025, it was 31% above its 2017 levels. In contrast, satellite television plummeted by 57% over the same period and now accounts for only 20% of pay TV (Undersecretariat of Telecommunications [Subtel], 2026b).

The structural reasons behind this divergence are already well known: the increased penetration of mobile internet connections facilitates access to *streaming* platforms in areas with low population density—where satellite used to be strongest—while cable remains a primary source of broadband access in households. This, along with bundled packages that include other services, allows cable to retain subscribers despite the fact that pay-TV consumption has fallen—according to Ibope figures—by 65% over the past five years.

Table 2. Pay-TV Networks in Chile

Top 10 Most-Watched Pay-TV Channels in Chile in 2025			
Channel	**Genre**	**Origin**	**[9] Household Rating (%)**
TNT Sports Premium	Sports	Chile	0.40
TNT Series	Fiction	Foreign	0.29
ESPN	Sports	Chile	0.29
24 Horas	Information	Chile	0.22
TNT Sports	Sports	Chile	0.18
Space	Fiction and More	Foreign	0.17
TNT	Drama and More	Foreign	0.17
Cartoon Network	Kids	Foreign	0.17
Latin America	Miscellaneous	Chile	0.16
Universal TV	Fiction	Foreign	0.15

Source: Ibope Chile.

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[9] Calculated over a 24-hour period and based on a weighted average of the ratings from January through March and from April through December.

Table 2 shows the ten channels with the highest viewership within a significantly broader lineup. For the second consecutive year, the list is topped by TNT Sport Premium, and overall, sports have consolidated a dominant position that was previously held by news channels and, before that, by children's channels[10] . Prior to TNT Sport Premium, the news channel 24 Horas led the *rankings* for the rest of the decade, and CNN Chile remained in the top five until 2022.

A striking feature of the 2025 ranking is the concentration around Warner Bros. Discovery. Six of the ten most-watched channels belong to that conglomerate: TNT Sports Premium, TNT Sports, TNT Series, TNT, Space, and Cartoon Network. Among them, the importance of soccer as a key player in the pay-TV industry is clear, as evidenced by the aforementioned free-to-air competition.

1.3 Funding Sources for the Audiovisual Sector

In pay TV, television services are often just one component among various bundled services—such as internet access, telephone service, and *streaming* services, among others—which makes it difficult to obtain revenue figures for television alone. However, it is possible to establish a lower bound based on the lowest prices of basic TV-only packages offered by some operators and the number of subscribers. This rough estimate yields minimum annual revenue of US$650 million from television services, but this figure is embedded within an industry with annual revenue exceeding US$5,000, excluding equipment sales (PwC, 2024). To this must be added its revenue from advertising sales, estimated by the Association of Media Agencies ([AAM], 2026) at US$24 million. Regardless of its revenue, with very few exceptions, pay TV does not produce fiction in Chile.

Free-to-air television, on the other hand, does produce fiction, and its main source of funding is advertising, estimated by the AAM (2026) at US$230 million in 2025. This figure remained unchanged from the previous year but was 30% lower than it was 10 years ago. It also receives competitive grants from the National Television Council (CNTV) totaling US$5 million. Growth in these sources seems unlikely. This has pushed channels to seek alternative sources of revenue. The most successful has been Mega, which has managed to generate 28% of its revenue from sources other than television advertising, particularly from streaming platforms, subscriptions, and content sales (Megamedia, 2026).

For television, CNTV funding helps enable the production of some programs with greater resources and higher quality than would be possible with advertising-only funding, but that additional 2% is not the pillar that sustains the industry.

[10] In 2010, for example, the top five pay-TV channels were children's channels, and their combined viewership was three times that of the top five in 2025.

1.4 Communication Policies

One of the challenges of digital terrestrial television is providing complete nationwide coverage. To supplement this coverage, in late 2025 Subtel approved a resolution that will allow, under certain conditions, coverage to be provided through an *online* app that must be installed on all new televisions (Subtel, 25c). According to industry executives, another goal is to strengthen free-to-air television by giving it presence through an app installed on all new *smart TVs* sold.

From a public policy perspective, the most pressing issue is the situation TVN, the public broadcaster, is facing. Its cumulative losses over the past 10 years exceed US$95 million, and if one additional year—the worst in its history—is included, the total reaches US$135 million. In May 2025, TVN's board of directors issued a dramatic statement: "We consider it our duty to inform the public that the conditions under the current public television model make the company's economic viability impossible" (Senate of the Republic, 2025). That model was very successful for 15 years, but today there is agreement that a reform is needed. The government of Sebastián Piñera in 2022 introduced a legislative initiative that was taken up by the government of Gabriel Boric with adjustments in 2024. The proposal aimed at a new funding mechanism, changes to internal governance, and an update to the channel's public mission. In January 2026, the Chamber of Deputies' Finance Committee approved the creation of an endowment fund with an initial government contribution of US$30 million, intended exclusively to finance the channel's public mission; however, the proposals regarding governance were rejected, and discussion of the mission remains pending. The committee's proposal must be approved by both the Chamber of Deputies and the Senate, but the average annual losses far exceed what that *endowment* could generate, and the discussion will be carried over to the new legislature that took office in March alongside the new government of José Antonio Kast, whose coalition has opposed public funding for the channel; thus, TVN's crisis has no clear path to resolution.

1.5 Digital and Mobile Connectivity Infrastructure

According to the Twelfth Survey on Internet Access, Usage, and Users in Chile, commissioned by the Undersecretariat of Telecommunications, 96.6% of households have their own paid Internet access. When broken down by urban or rural location, both groups exceed 95%. However, gaps persist in some specific segments, particularly in lower-income households and those composed solely of older adults, which continue to show lower levels of access to and adoption of advanced technologies than the national average (Subtel, 2026a).

Regarding internet usage, the same survey confirms a high degree of digitalization in daily life. Smartphones remain virtually ubiquitous among users: 95.7% report using one. This reinforces the central role of mobile access in daily connectivity. Furthermore, according to Subtel's sector reports, mobile internet access via smartphones continued to grow throughout 2025, while 3G connections continued to be replaced by 4G and 5G plans. In this regard, rather than a simple expansion of access, what is observed is a gradual shift in consumption and daily connections toward mobile devices, even in a context where fixed connectivity remains highly relevant within the home (Subtel, 2025a; 2026b).

The quality of available connectivity also continued to improve throughout 2025. According to Subtel's year-end sector report, 84.0% of fixed connections were fiber-optic, and the percentage of households with fixed internet reached 68.8%. In the mobile sector, 5G connections totaled 9,698,786 as of December 2025. These figures show that the recent development of connectivity in Chile cannot be described solely as an increase in access, but also as a sustained migration toward higher-capacity networks, capable of better supporting intensive consumption of video, platforms, social media, and other online digital content (Subtel, 2026b).

2. Analysis of the Year: the national and Ibero-American fiction premiere on Open TV in 2025

TABLE 1. Newly Released Fiction televisions Screened in 2025[11]

PREVIOUSLY UNRELEASED NATIONAL TITLES - 6	PREVIOUSLY UNRELEASED FOREIGN TITLES – 1
Mega	**Mega**
1. *Aguas de Oro* (telenovela)	1. *Tierra de Deseos* (telenovela—Brazil)
2. *El Jardín de Olivia* (telenovela)	
3. *Juego de Ilusiones* (telenovela)	
4. *Los Casablancas* (telenovela)	
5. *Nuevo Amores de Mercado* (telenovela)	
6. *Reunión de Superados* (telenovela)	**TOTAL NUMBER OF NEW TITLES: 7**

Source: Ibope Chile – OBITEL Chile.

[11] It should be noted that La Red does meet the criterion of national reach stated in the article3 . Despite this, it is not included in this chapter because neither its viewership nor its programming data are available. Due to nonpayment, it is excluded from audience measurement systems. Since it does not produce fiction, this omission does not affect national figures; however, it does air Ibero-American productions such as, in 2025, the Peruvian series **Al Fondo Hay Sitio** and **De Vuelta al Barrio**, the Colombian series **Sinú** and **Río de Pasiones**, and the Portuguese series **Nazaré**. Nevertheless, its audience is negligible. When adding La Red, Telecanal, the secondary channels of all the channels that are included, and dozens of smaller coverage channels, its total audience was 0.78 household *rating* points.

Although the number of Chilean and Latin American premieres has been declining in recent years (27 and 28 in 2015; 10 and 4 in 2024), 2025 saw an unprecedented situation in which the list of the 10 most-watched titles (Table 5) could not be completed because there were only seven. In this scenario, the only program that remained was Mega's in-house production. The other channels neither produced nor imported new content of Ibero-American origin. And the only one that does appear in Table 1 is *Tierra de Deseos*, which began airing in 2024. What did premiere, however, were titles of Turkish origin. A total of 11, distributed among Mega (6), Canal 13 (3), TVN (1), and CHV (1).

There were, however, reruns of both domestic and foreign titles, as well as Turkish ones (6), but these are not included in Table 1b.

TABLE 1b. Broadcast of reruns during 202 5

RE-RUN DOMESTIC PROGRAMS - 23	**RE-RUN FOREIGN PROGRAMS - 11**
CHV	**CHV**
1. *La Doña* (Telenovela)	1. *Justicia* (Miniseries—Brazil)
2. *La Sexóloga* (Telenovela)	**Canal 13**
Channel 13	2. *Rastros de Mentiras* (Telenovela—Brazil)
3. *Héroes: Bernardo O'Higgins* (TV Movie)	**Mega**
4. *Héroes: Manuel Rodríguez* (TV Movie)	3. *Chespirito* (Sitcom—Mexico)
Mega	4. *The Boarding School* (Series—Spain)
5. *El Niño Rojo* (Miniseries)	**TVN**
6. *I Love Robin* (Series)	5. *Café con Aroma de Mujer* (Telenovela—U.S.—Hispanic)
TV+	6. *El Chapulín Colorado* (Sitcom—Mexico)
7. *Infieles* (TV Series)	7. *El Chavo del Ocho* (Sitcom—Mexico)
8. *Los años dorados* (Sitcom)	8. *El Clon* (Telenovela—Brazil)
TVN	9. *José de Egipto* (Telenovela—Brazil)
9. *Aquelarre* (Telenovela)	10. *Moisés los 10 Mandamientos* (Brazilian Telenovela)
10. *Delantero Romano* (Telefilm)	11. *Rey David* (Telenovela—Brazil)
11. *Dónde Estás Constanza* (Telefilm)	
12. *El Cuento del Tío* (Serie)	
13. *El Día Menos Pensado* (Docudrama)	
14. *El Niño que Enloqueció de Amor* (Telefilm)	
15. *El Pozo* (Telefilm)	
16. *Gracia y el Forastero* (Telefilm)	
17. *La Chascuda* (Telefilm)	
18. *La Chica del Crillón* (Telefilm)	
19. *La Fiera* (Telenovela)	
20. *La Quintrala* (Miniserie)	
21. *La Vida es una Lotería* (Unitarios)	
22. *Romané* (Telenovela)	
23. *Teresa de los Andes* (Miniserie)	**TOTAL NUMBER OF REPLACED TITLES: 34**

Source: Ibope Chile – OBITEL Chile

The list of reruns is long and includes all channels, but in terms of total hours, it is only significant for TVN, which aired more than 1,000 hours of rerun Ibero-American fiction programming, 63% of which was produced in-house. Almost all of it

premiered more than 20 years ago, and in one case, as long as 40 years ago. Turkish productions also featured heavily in reruns, with six titles and 270 hours, surpassing any Ibero-American country except Chile.

TABLE 2. Formats of Newly Aired Domestic Fiction and Their Evolution Over the Five-Year Period

Format\Titles	2021	2022	2023	2024	2025	Average
Telenovela	7	7	6	9	6	7.0
Series	2	2	1	0	0	1.0
Miniseries	3	0	3	1	0	1.4
Telefilm	0	0	0	0	0	0.0
Unitarian	0	0	0	0	0	0.0
Docudrama	1	0	1	0	0	0.4
Others	0	0	0	0	0	0.0
Total	**13**	**9**	**11**	**10**	**6**	**9.8**

Format\Hours	2021	2022	2023	2024	2025	Average
Telenovela	545:00	457:00	470:50	458:35	366:35	459:36
Series	20:50	19:55	11:25	0:00	00:00	10:26
Miniseries	10:45	0:00	11:45	2:25	0:00	4:59
Telefilm	0:00	0:00	0:00	0:00	0:00	0:00
Unitarian	0:00	0:00	0:00	0:00	0:00	0:00
Docudrama	10:05	0:00	2:30	0:00	0:00	2:31
Others	0:00	0:00	0:00	0:00	0:00	0:00
Total	**586:40**	**476:55**	**496:30**	**461:00**	**366:35**	**477:32**

Source: Ibope Chile – OBITEL Chile

Table 2 shows a decline in 2025 compared to 2024 in both the number of titles and the number of hours of new programming produced. Rather than a one-time occurrence, this appears to represent a new normal for Chilean fiction. Excluding the hiatus caused by the COVID-19 pandemic in 2020–2021, the four preceding years averaged 18.5 titles and 870 hours, while the four subsequent years averaged 7 titles and 438 hours, with only Mega continuing to produce fiction on a regular basis.

TABLE 3. New fiction series aired in 2025: countries of origin

Country	Titles	%	Hours	%
NATIONAL (total)	**6**	***85.7***	**366:35**	***92.7***
OBITEL COUNTRIES (total)	**1**	***14.3***	**29:00**	***7.3***
Argentina	0	*0.0*	0:00	*0.0*
Brazil	1	*14.3*	29:00	*7.3*
Chile	6	*85.7*	366:35	*92.7*
Colombia	0	*0.0*	0:00	*0.0*
Ecuador	0	*0.0*	0:00	*0.0*
Spain	0	*0.0*	0:00	*0.0*
U.S. Hispanic	0	*0.0*	0:00	*0.0*
Mexico	0	*0.0*	0:00	*0.0*
Peru	0	*0.0*	0:00	*0.0*
Portugal	0	*0.0*	0:00	*0.0*
Uruguay	0	*0.0*	0:00	*0.0*
Venezuela	0	*0.0*	0:00	*0.0*
CO-PRODUCTIONS (Total)	0	*0.0*	0:00	*0.0*
Domestic Co-productions	0	*0.0*	0:00	*0.0*
Co-productions with Obitel countries	0	*0.0*	0:00	*0.0*
TOTAL	**7**	***100.0***	**395:35**	***100.0***

Source: Ibope Chile – OBITEL Chile

The long-standing decline in Ibero-American fiction, which has been a recurring theme in previous years' Chilean reports, appears to have reached its final stage. Table 3 shows the Brazilian title as the sole example of new Ibero-American fiction screened in Chile. Its screening did not begin in 2025 but in 2024. A comparison with data from 10 years ago reveals a complete transformation of the landscape. In 2014, Chilean production accounted for less than one-third of the total, with 27 titles instead of six. Another third was Mexican, and the rest was divided among six countries. It is the reruns that prevent us from asserting that the television fiction being watched is exclusively Chilean or Turkish.

TABLE 4. National and Ibero-American Fiction Formats Broadcast in 2024

Format	Titles				Hours			
	National	%	Rest of Obitel	%	Domestic	%	Other Obitel	%
Telenovela	6	100.0	1	100.0	366:35	100.0	29:00	100.0
Series	0	0.0	0	0.0	0:00	0.0	0:00	0.0
Miniseries	0	0.0	0	0.0	0:00	0.0	0:00	0.0
Telefilm	0	0.0	0	0.0	0:00	0.0	0:00	0.0
Unitarian	0	0.0	0	0.0	0:00	0.0	0:00	0.0
Docudrama	0	0.0	0	0.0	0:00	0.0	0:00	0.0
Other	0	0.0	0	0.0	0:00	0.0	0:00	0.0
Total	6	100	1	100	366:35	100	29:00	100

Source: Ibope Chile - OBITEL Chile

The shift in fiction consumption has affected all formats. The one that persists is the telenovela. In other years, miniseries have been produced, but this is almost always a strategy to secure funding. The CNTV Fund promotes audiovisual creation in television. To qualify for it, some films have been produced in such a way as to also have a television version consisting of just a few episodes.

[12]

TABLE 5: Top 10 Most-Watched Titles in 2025

	Title	Channel	Production Company (Country)	Format/Genre	No. of Episodes in 2025	Time Slot	Rating	Share
1	*Los Casablanca*	Mega	Megamedia/Chilefilms (CL)	Telenovela/ Drama	143	*Prime time*	11.5	20.9
2	*Reunión de Superados*	Mega	Megamedia/Chilefilms (CL)	Telenovela/ Romantic comedy	54	*Prime time*	11.3	19.6
3	*Juego de Ilusiones*	Mega	Megamedia/Mazal (CL)	Telenovela/ Melodrama	53	*Afternoon*	10.5	22.2
4	*Aguas de Oro*	Mega	Megamedia/ Mazal (CL)	Telenovela/ Romantic comedy	80	*Prime time*	10.4	17.4
5	*El Jardín de Olivia*	Mega	Megamedia/ Mazal (CL)	Telenovela/ Melodrama	202	*Afternoon*	9.1	20.1
6	*Nuevo Amores de Mercado*	Mega	Megamedia/Mazal (CL)	Telenovela/ Romantic comedy	121	*Prime time*	8.9	14.8
12[12]	*Tierra de Deseos*	Mega	TV Globo (BR)	Telenovela/ Drama	42	*Afternoon*	5.5	12.2
Total domestic productions: 6				Original foreign screenplays: 1				
86%				10%				

Source: Ibope Chile – OBITEL Chile

[12]The Brazilian series *Tierra de Deseos* appears with a rating of 12 instead of the 7 that would correspond in the table, indicating that this is the position it would occupy if the Turkish drama were included in this list.

Mega's dominance with its in-house productions among the highest-rated programs has held steady in recent years, so the top half of Table 10 comes as no surprise. The bottom half, however, represents an unprecedented anomaly in at least 35 years—dating back to when Mega, then known as Megavisión, launched private television and attempted, with little success, to compete with TVN and Canal 13 by airing Ibero-American fiction. In 2025, there were no more than seven Ibero-American television fiction programs.

TABLE 6: Audience profile of the 10 most-watched titles in 202 5[13]

Title		Channel	Gender %		GSE%		
			Women	Men	High	Medium	Low
1	*Los Casablanca*	Mega	63.3	36.7	14.8	46.8	38.5
2	*Reunión de Superados*	Mega	65.8	34.2	18.1	47.0	34.9
3	*Juego de Ilusiones*	Mega	71.2	28.8	-	-	-
4	*Aguas de Oro*	Mega	64.6	35.4	14.8	46.4	38.8
5	*El Jardín de Olivia*	Mega	73.7	26.3	14.7	43.1	42.3
6	*Nuevo Amores de Mercado*	Mega	67.2	32.8	16.4	45.0	38.6
12	*Tierra de Deseos*	Mega	69.5	30.5	-	-	-

Title		Age %					
		04–12	13–17	18–24	25–34	35–49	50–99
1	*Los Casablanca*	3.8	2.1	3.7	7.5	20.7	62.3
2	*Reunión de Superados*	4.1	1.7	3.2	7.8	23.8	59.3
3	*Juego de Ilusiones*	2.6	2.6	4.8	8.8	16.7	64.5
4	*Aguas de Oro*	4.7	1.9	3.6	8.1	21.9	59.9
5	*El Jardín de Olivia*	4.5	1.6	2.3	7.3	17.6	66.7
6	*Nuevo Amores de Mercado*	4.4	3.1	4.8	9.3	22.6	55.8
12	*Tierra de Deseos*	4.3	2.6	6.1	7.7	15.3	64.0

Source: Ibope Chile – OBITEL Chile

A comparison of the audience profiles for the 10 most watched shows in 2015 and 2025 helps illustrate this phenomenon. Focusing the comparison solely on those aged 25 and older, in 2015 the 25–49 age group accounted for 37% of the audience,

[13] The change in audience measurement also resulted in changes to its segmentation between the first quarter and the other three. It shifted from four socioeconomic groups to three and in the age division for the over-50s bracket. This was resolved in the table by combining both brackets, but two of the telenovelas are primarily in the first quarter. In their case, the data was omitted.

and those aged 50 and older accounted for 42%. That's 5% more for the older demographic. In 2025, those percentages shifted to 28% and 62%. That's 34% more.

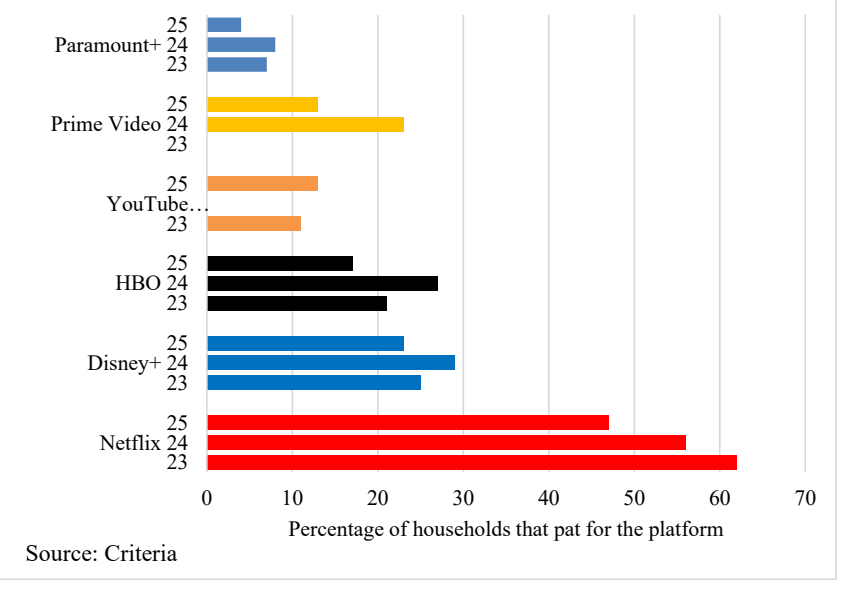
3. VoD Monitoring 202 5

3.1 VoD Platform Market

Following the growth in platform penetration during the pandemic, a period of readjustment has set in for the Chilean streaming market: virtually all SVOD platforms are losing ground in households. Several factors are contributing to this: the restriction (and charging for) of shared accounts on Netflix since late 2023; rate hikes and the introduction of ad-supported plans on HBO, Disney+, and Prime Video.

The longitudinal data series from the consulting firm Criteria shows an across-the-board decline in 2025 compared to 2024: Netflix fell from 56% to 47%, HBO from 27% to 17%, Prime Video from 23% to 13%, Disney+ from 29% to 23%, and Paramount+ from 8% to 4% (Figure 3). Cumulatively since 2023, Netflix's decline amounts to 15 percentage points. The proportion of households with at least one paid subscription fell from 88% to 68% over the same period, with a marked gap by socioeconomic status (82% for ABC1, 58% for D)[14] . At the same time, platform prices rose 13.1% between January 2024 and March 2025 alone. This is more than double the rate of general inflation (Economic and Social Observatory of the University of La Frontera [OES-UFRO], 2025).

Figure 3. Penetration of the main paid VoD platforms

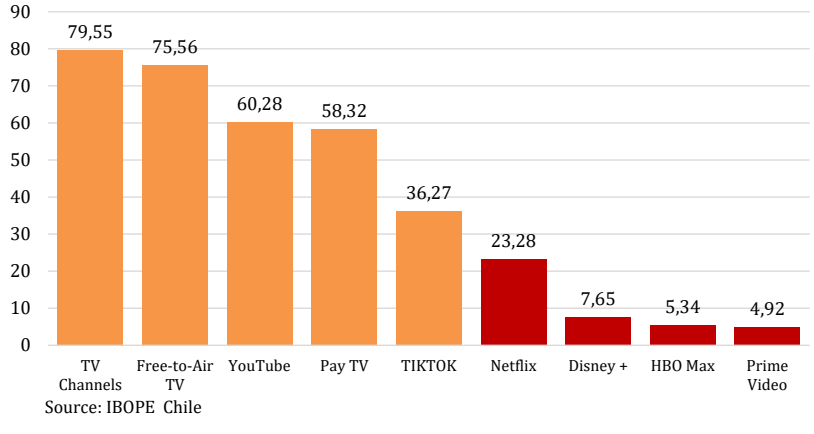


Source: Criteria

[14] Criteria Insights, a longitudinal series on streaming platform penetration in households, with data from 2023, 2024, and 2025. Household-level recall survey.

A second perspective on the actual reach of consumption is provided by Ibope's new *cross-media* measurement, based on the electronic recording of content streamed on devices in the home (Figure 4). Free-to-air TV leads in weekly reach with 76%, followed by YouTube (60%) and pay TV (58%); Netflix reaches 23.3%, and Disney+, HBO Max, and Prime Video range between 5% and 8% (Figure 4). The gap with Criteria allows for a more nuanced interpretation of a common assumption: the widespread adoption of streaming platforms has not displaced traditional TV in terms of actual consumption, although it does compete with it for viewing time—streaming averaged 86 minutes per day among Chilean households, according to the 11th National Television Survey (National Television Council, 2024).

Figure 4. *Cross-media* consumption: percentage of the population reached in a week [15]



The structural landscape could soon be reshaped: the acquisition of Warner Bros. Discovery announced by Netflix in October 2025, with the deal expected to close in the third quarter of 2026, would combine the current market penetration of Netflix and HBO Max under a single operator, reaching nearly 60% of Chilean households.[16]

3.2 Analysis of VoD in 2025

As in the rest of the region, most of the major international subscription platforms operate in the Chilean VoD market. This section focuses on platforms created or operated from Chile, which are driven by their own institutional, commercial, or cultural logic. The following table classifies the main platforms according to their operating entity, business model, and distribution type.

[15] Data from the first week of December 2025.
[16] Netflix, Inc., Form 8-K, October 2025, filed with the U.S. Securities and Exchange Commission.

Table 3: National Platforms

Platform	Model[17]	Type[18]	Profile
GOVERNMENT-RUN			
CNTV Play (CNTV)	Free	VoD	Catalog of fiction, documentaries, and audiovisual works funded by the public competitive grant program.
CNTV Kids (CNTV)	Free	VoD/LS	Children's programming. Combines domestic productions with curated educational and developmental content.
Ondamedia (Ministry of Culture)	Free	VoD	Publicly funded Chilean films, documentaries, and audiovisual works. Pays creators based on viewership.
TVN Play (TVN)	Free	VoD/LS	Four live channels (TVN, NTV, TVN 3, TV Chile) plus an archive of fiction, news, and other genres.
TV Senado (Chilean Senate)	Free	VoD/LS	Live legislative sessions, news content, and events of public interest such as the Congress of the Future.
CDTV (Chamber of Deputies)	Free	VoD/LS	Live plenary and committee sessions, plus an archive of past sessions and news and institutional programs.
HERITAGE AND UNIVERSITY CHANNELS			
National Film Archive (CNCA)	Free	VoD	Works from Chile's film heritage. Dedicated to the preservation and dissemination of historical audiovisual memory.
USACH Archive (Universidad de Santiago)	Free	VoD	Historical audiovisual records related to the former National Technical University.
UC Film Archive (Universidad Católica)	Free	VoD	Historical film archive with an extension into contemporary productions.
Film Archive Universidad de Chile)	Free	VoD	Heritage archive organized around thematic collections with records dating back to 1903.
FREE-TO-AIR TELEVISION CHANNELS			
13Go (Canal 13)	Freemium	VoD/LS	Archived themed channels (*reality shows*, TV series, festivals, culture) on the paid tier; live channels on the free tier.
América Vivo (Canall 13)	FAST	LS	Latin American content in Spanish. Available globally. Targeted at the Hispanic market in the U.S.
MiCHV (Chilevisión)	Freemium	VoD/LS	Offers exclusive *reality* TV content via subscription on YouTube
Mega Go (Megamedia)	SVOD	VoD/LS	Available directly and as part of pay-TV operator packages.
PAY-TV OPERATORS			
VTR Play (VTR)	Operator	VoD/LS	Linear television with included access to *streaming* platforms (Max, Prime Video, Riivi, among others)

[17] FAST: Free Ad-Supported Streaming TV; AVOD: Advertising Video on Demand; SVOD: Subscription Video on Demand; TVOD: Transactional Video on Demand; Freemium: A hybrid model with a free tier for basic access and a paid tier; Operator: A digital platform associated with a pay-TV or telecommunications provider.
[18] VoD: Video on Demand; LS: Linear Streaming.

Platform	Model[17]	Type[18]	Profile
Claro Play (Claro Chile)	Operator	VoD/LS	Linear TV with a selection of integrated platforms equivalent to VTR Play.
Movistar Play (Movistar Chile)	Operator	VoD/LS	Combines content included in the plan with titles available for rental or individual purchase.
Entel Go (Entel)	Operator	VoD/LS	Live channels and on-demand catalog. Offer varies depending on the plan subscribed to.
DGO (DirecTV)	Provider	VoD/LS	Live channels (including DSports). Extensive VoD library and *streaming* platform packages depending on the plan.
TNT Sports Stadium (TNT Sports Chile)	SVOD	VoD/LS	Specializes in sports. Chilean professional soccer (First Division) and international tournaments, live and on demand.
INDEPENDENT			
Pijamafilms (Fábula)	TVOD	VoD	Independent film rentals without conventional territorial distribution. 80% of the revenue goes to the creators.
MicroCine.tv (Pro Cine SpA)	TVOD/AVOD	VoD	Chilean and Latin American short films and short-form series.
Riivi (Riivi Streaming SpA)	AVOD	VoD	Catalog of Latin American films, series, documentaries, and telenovelas. Available in four countries.
Zapping (Zapping TV Inc.)	Operator	LS	IPTV without a set-top box or cable installation. Over 150 live national and international channels with various subscription plans.

Source: Compiled by the authors

A distinctive feature of this period is the emergence of small-scale, independent initiatives targeting specific niches in the film market. Riivi, which has been operating since 2021 on an advertising-based model, has established itself as a distribution platform for Latin American films that do not find a place on major commercial platforms. Joining it are two more recent initiatives that share this same approach: MicroCine.tv, which specializes in Chilean and Latin American short films and short-form series; and Pijamafilms, owned by the production company Fábula and focused on renting out independent feature films that lack territorial distribution in conventional circuits. All three share a key feature for the national audiovisual ecosystem: through different access models, they replicate the distribution role that the public sector has historically fulfilled via platforms such as Ondamedia, but from the private sector and with a scope that extends beyond the local market.

3.3 Nationally Premiered Fiction televisions and Co-productions

The Chilean production company with the strongest international presence remains Fábula, with offices in Santiago, Mexico City, Los Angeles, and, more recently, Spain; it contributes two titles to Table 7: the second season of *Baby Bandito* (Netflix) and the comedy *Sin Frenos* (Prime Video). Domestically, the bulk of the national fiction

content available on VoD in 2025 comes from Mega's telenovelas streamed on Mega Go, most of which were co-produced by Mazal Producciones in partnership with Chilefilms.

TABLE 7. Domestic Titles and Co-productions Premiering in 2025 on VoD Platforms

NATIONAL PREMIERE TITLES[19]	PREMIERE CO-PRODUCTIONS
Mega Go (6) 1. *Juego de Ilusiones, Season 3* (telenovela) 2. *Nuevo Amores de Mercado* (telenovela) 3. *Los Casablanca* (telenovela) 4. *El Jardín de Olivia, Season 1, Season 2* (telenovela) 5. *Aguas de Oro* (telenovela) 6. *Reunión de Superados* (telenovela) **Netflix (1)** 7. *Baby Bandito, Season 2* (series) **Prime Video (1)** 8. *Sin Frenos* (series)	

Source: Obitel Chile

The telenovelas listed in Table 7 were aired simultaneously on broadcast television and on Mega Go, the channel's own streaming platform, so their presence on VoD functions as an extension of television viewing rather than as a standalone platform market. Only two titles on the list break this pattern: *Baby Bandito* and *Sin Frenos*, both produced by Fábula for international platforms.

In 2025, *Baby Bandito* returned with a second season of eight episodes, also produced by Fábula. The first season had reached the number one spot globally among non-English-language series on the platform.

Sin Frenos premiered on October 10, 2025, on Prime Video. It is a comedy created by Rodrigo Bastidas, directed by Colombian Felipe Martínez Amador, and produced by Fábula. Starring Javiera Contador and Venezuelan Yul Bürkle, it addresses the phenomenon of migration through the comedy genre. The project is explicitly part of Amazon Studios' lineup of Latin American originals, which includes titles such as *Vencer o Morir* and the *Sayen* trilogy.

Perhaps this is simply a consequence of Chile's low volume of exclusive production for streaming platforms, but in reality, there is no clear boundary between television and *streaming* in Chile. Most of the *streaming* content consists of telenovelas. In these shows, broadcast on free-to-air TV and distribution via OTT tend to be simultaneous or nearly simultaneous, but within the channel's own ecosystem (Mega Go, TVNPlay, 13Go), and only to a lesser extent on international platforms. This means that the *streaming* reach of these telenovelas is difficult to separate from their

[19] NTV content is not included since it is streamed on its website, not through platforms

television reach, and it largely falls outside the metrics of Netflix or Prime. In fact, Ibope Chile's new multiplatform measurement system, which went live in April 2025, addresses exactly that need, but it is still incomplete, as it measures television in detail but does not distinguish between the content consumed on different platforms.

4. Interactivity and Audience Participation

Telenovelas and fiction programming on Chilean television did not introduce any major innovations in audience engagement during 2025, particularly because such programming was concentrated on a single channel, Mega. On that channel, Instagram was the most widely used platform, although TikTok followed very closely behind. The Mega Drama Department's account, @teleseries_mega, is the most active, with more than 16,600 posts and 800,000 followers. The account @megashorts.mega was also added to this channel; it features vertical fiction productions, which we will explore in greater detail later in this chapter. Content from Mega's telenovelas is also shared on the @mega.tv account, which has 3.5 million followers, bringing the total reach to over four million people. The content consists mainly of video *reels* lasting approximately 90 seconds, featuring scenes from the various telenovelas currently airing; in the first few seconds of each reel, a title appears with a three-line explanatory phrase in the center of the image. However, the title overlays do not appear in the profile grid images of the accounts, so selection from there must be based on recognition of the character appearing in the frame (the telenovela's title is not indicated). In this regard, it appears that the main objective is to encourage on-screen *scrolling* through videos from Mega's entire fiction lineup, without differentiating by specific show. On the other hand, Teleseries Mega's TikTok account, mega_teleseries, has 1.2 million followers and nearly 80 million likes. The layout of the videos on the platform provides more information, as it allows the titles of each *reel* to be displayed with t having to select them, and they can also be accessed through a title menu. In this regard, the experience of interactivity and content selection on social media appears to be richer, although it requires more active engagement from users.

Digital channels on social media have also been used as a way to build audience loyalty before a telenovela's premiere. In this regard, the audience's constant use of social media and the 360-degree nature of content creation are acknowledged. Thus, several weeks before a telenovela premieres, the aforementioned accounts post short videos of rehearsals, scriptwriters' meetings, brief interviews with the actors who will play roles in the series, and visits to the locations where the story will unfold. The narrative strategy involves a casual, relaxed interview conducted by at least two journalists dedicated to this task, in which they themselves become

part of the content shared on social media. In any case, the reactions are not particularly significant, given the number of followers these accounts have, as the Reels with the most "Likes" have 14,000.



Source: @teleseries_mega and @mega.tv, Instagram, accessed May 25, 2026

5. Highlights of the Year: The "New" Chilean Melodrama: Mobile Consumption and Vertical Narratives

The rise of *streaming* has profoundly transformed the ways in which audiovisual content is accessed and consumed, positioning mobile devices as the central hub of contemporary viewing (Valiati, 2019). In recent years, a significant transformation has emerged in digital entertainment: vertical dramas or micro-dramas (Chen, 2025). This narrative format, which originated in China in the late 2010s, was driven by the widespread adoption of *smartphones*, mobile internet, and short-form video platforms such as Douyin and Kuaishou (Hanney, 2025).

In Latin America, vertical dramas began to expand with their own distinct characteristics, particularly linked to social media and funding models based on views rather than paid subscriptions. In Chile, this phenomenon takes on particular significance due to the recent crisis in domestic television drama (Julio Pohlhammer et al., 2025). The production of telenovelas, historically central to Chilean television, was reduced almost exclusively to Mega following the closure of the drama departments at Canal 13 and TVN due to financial problems. However, since October 2025, Canal 13 has resumed fiction production through "mini-novelas" for Instagram, launching the vertical drama format in the country with *Mi Boda es una Trampa* and *El Obrero que me enamoró*, both broadcast via the official @mininovelas13 account and surpassing 25 million views (Gálvez, 2025).

The phenomenon initiated by Canal 13 and its "Mininovelas13" brand—a pioneer in the production of fiction specifically designed for Instagram in vertical format—quickly established itself as a new digital fiction strategy driven by the major free-to-air television channels, amid a shift in audiovisual consumption practices toward mobile devices and social media platforms. Televisión Nacional de Chile (TVN) launched "TVN Vertical," developing series such as *Auditoría de Amor*, *Mi Marido me Robó la Memoria*, and *Acelera mi Corazón*, which, according to the channel's official figures, collectively surpassed 100 million views on digital platforms. In addition, TVN announced in 2026 a production plan for at least ten vertical series to premiere monthly, viewing the format as an alternative means of monetization and a way to connect with audiences who no longer consume linear television (TVN, 2026a, 2026b).

For its part, Mega—the only Chilean channel with a robust and permanent drama division—entered the format in 2026 with "MegaShorts," an initiative led by Quena Rencoret and conceived as a digital expansion of the channel's telenovela tradition. Its first production, *Salvando a Ema*, starring Juanita Ringeling and Mario Horton, was presented as a "high-impact" drama designed for social media and mobile devices, retaining classic elements of the Chilean telenovela but adapted to short episodes and vertical viewing (Mega, 2026a, 2026b).

More than a technical innovation, vertical dramas involve a reconfiguration of the logic of production, circulation, and consumption of Latin American melodrama, which remains the dominant structural framework, albeit adapted to the fast-paced rhythms of mobile consumption. However, while vertical dramas allow for the emergence of new voices and reduce production costs, their circulation depends heavily on digital platforms and recommendation algorithms. Unlike the Chinese model, which is based on paid apps, Chilean vertical dramas operate through funding supported by view counts and local virality.

6. Theme of the Year: Women Behind the Came295 ras in Television Fiction

6.1. A Gap the Chilean Industry Also Faces

As in the rest of Ibero-America, the Chilean audiovisual industry has been fundamentally rooted in a deep androcentric bias. Evidence gathered over the past few decades confirms that women in the field have traditionally faced structural and everyday obstacles to their career development in an environment marked by a work culture frequently described as a "Toby Club."[20] This is particularly relevant for women in technical roles, who describe a male-biased environment that begins during their training at technical schools and universities and becomes more entrenched as they enter the professional workforce.

Available data show a wage gap of around 13% among individuals with stable employment contracts in an industry where informal employment and self-employment are common (Lobos, 2023). Other studies go further and show that women working in the audiovisual sector could earn 27% less than their male counterparts, as demonstrated in "Women in the Audiovisual Field: Gender Barriers and Gaps in the Chilean Arts Sector" (OPACE, 2021).

The gaps are not limited to wages but also extend to the creation and distribution of roles within the industry, as there is a marked hierarchical pyramid and deep-seated segregation (OPACE, 2021). Historically, more than 80% of Chilean feature films have been directed by men and only 12% by women. The rest are directed by mixed-gender teams.

According to Cinema Chile's international catalogs (El Mostrador Cultura, 2023; Cinema Chile, 2022a and 2022b), between 2021 and 2022, more than 200 Chilean women participated in audiovisual productions, with many women frequently holding multiple roles on a single project, including 52 female directors (37 in film, 15 in TV), 130 female producers (63 in film, 67 in TV), and 171 women in technical roles. Participation was concentrated in art direction, screenwriting, and editing, and was lower in cinematography, sound, and animation direction.

The same catalog for the 2023–2024 period notes that 8 of the 16 completed TV series and 7 of the 22 in development were directed by women (Cinema Chile, 2024). Among the former are Pepa San Martín, Vanesa Miller, María Elena Wood, Rosario Jiménez-Gili, Joy Penroz, Macarena Denisse, and Klaudia Kemper; among the latter are Tiare Pinto, Manuela Espineira, Javiera Norambuena, Josefina Cabezón, Carola Fuentes, and Constanza Maldonado. In film, the catalog lists 122 women on technical crews: 40 art directors, 24 editors, 23 screenwriters, 18 cinematographers, 13

[20] In reference to the character from the comic strip and cartoon **La Pequeña Lulú**, in which the character Toby had a club of friends whose motto was "No women allowed."

sound engineers, and 4 animation directors.

Despite the increase in women's participation behind the camera, women are concentrated in middle management and technical-aesthetic roles with limited decision-making power (Lobos, 2023), while men dominate leadership positions—such as directing, screenwriting, and production—and technical-specialist areas, such as cinematography and sound (OPACE, 2021). In Chile, cinematography in fiction— television, and streaming platforms—remains predominantly a male world. This pattern is replicated across Ibero-America: in 2021, Latin America had approximately 20% women in directing and screenwriting, achieving parity only in traditionally feminized roles such as costume design and makeup (FIACINE, 2022). This is not a neutral distribution, but rather a reflection of hierarchies of prestige and compensation that place precisely those areas where women have greater access in a subordinate position.

Added to this is an educational paradox: although women in the sector attain higher levels of education than men, their participation drops significantly upon entering the professional workforce (OPACE, 2021). These gaps are also explained by the difficulty of balancing long and precarious shooting schedules with motherhood and caregiving responsibilities, as well as by the persistence of sexual harassment and violence in the industry (OPACE, 2021). This imbalance extends to funding: as of 2019, 77% of productions supported by the CNTV were directed by men and only 20% by women (OPACE, 2021). In the face of this situation, forming associations and networking have served as survival strategies, with groups such as Nosotras Audiovisuales (NOA), Cabras Audiovisuales Concepción, Colectiva Lumbre, and Colectiva Varias Coquimbo working to highlight female talent, build support networks, and fight for spaces in a less patriarchal industry.

6.2. Women Behind the Camera in the World of Streaming

Even within this context of inequality, a new generation of female filmmakers has emerged in recent decades, diversifying narratives and bringing visibility to more complex female perspectives. Between 2020 and 2025, this boom was linked to profound transformations in the Chilean industry: the rapid incorporation of international *streaming* platforms as producers of local content and the emergence of new forms of independent production for digital platforms, which opened up opportunities for women in high-responsibility creative and technical roles. Notable works from this period include *42 Días en la oscuridad* (Netflix, 2022), directed and co-written by Claudia Huaiquimilla, a Mapuche-Chilean filmmaker who integrates perspectives on gender and territorial identity into her narrative; *La Jauría* (Amazon Prime Video, 2020), with Mariali Rivas on the directing team and a sustained

presence in serialized fiction and regional co-productions; and the adaptation of *La Casa de los Espíritus* for Amazon Prime, directed by Francisca Alegría. Also relevant to this maturation process is the development in Chile of Screen Capital, Latin America's first fund management firm for the audiovisual and entertainment industries, founded by Tatiana Emden, and Joyce Zylberberg to connect investors with film and series projects that have commercial potential.

6.3. The Leadership of María Eugenia Rencoret

Despite the sustained decline in fiction programming on broadcast television over the past decade—marked by the financial and editorial crisis at TVN, once the leading producer of telenovelas; the intermittent production by Canal 13 and Chilevisión; and the consolidation of Mega as the sole stable producer—Chilean television fiction, particularly the telenovela, continues to be a bastion of women's participation behind the scenes. In this context, María Eugenia "Quena" Rencoret plays a key role, both as a director and producer associated with a pivotal generation of telenovelas and as a manager capable of organizing teams, programming schedules, and production processes. Her move from TVN to Mega reshaped the landscape of Chilean television drama, and in 2023 she received the Anatel National Award in recognition of her 38-year career (Anatel, 2023). For more than 25 years, she was one of the main creative and executive leaders of TVN's drama division, where she helped establish afternoon and evening telenovelas as central programming pillars. Her resignation in 2013, along with other members of the drama department, was seen at the time as a blow to the industry. At Mega, she spearheaded the development of a drama department practically from scratch and led the resurgence of Chilean telenovelas in the 8:00 p.m. time slot, with productions designed for family audiences and mass viewership. With her at the helm, Mega's in-house productions have accounted for 60% of the ten most-watched titles each year (Table 5) over the past decade.

6.4. Women's Influence Behind Television Drama

Rencoret is not the only woman holding a highly influential role in national fiction. Daniela Demicheli, an executive producer, joined TVN as a production assistant on the teams led by Rencoret and Vicente Sabatini, and was promoted to executive producer in 2005, primarily overseeing late-night telenovelas. She was part of the senior leadership team that left TVN alongside Rencoret to establish Mega's drama division, where she has produced telenovelas across all time slots, including *Perdona Nuestros Pecados*, *Pobre Gallo*, *Como la Vida Misma*, *Nuevo Amores de Mercado*, and *El Jardín de Olivia*. Also notable in this field is Verónica Saquel, a producer, screenwriter, and head of scriptwriting, who led projects at TVN and Canal 13, where she

served as general director of the drama department, overseeing telenovelas such as *Machos*, *Tentación*, *Brujas*, and *Papi Ricky*. At Mega, she has spearheaded the scripts for daytime productions such as *Verdades Ocultas*—the longest-running telenovela in Chilean history— and *Juego de Ilusiones*.

The gender gap is difficult to document in production and assistant directing roles because Chilean television credits are not always publicly available or systematically organized. Even so, various sources make it possible to identify female producers on recent fiction teams, such as Cecilia Aguirre, Verónica Basso, Verónica Brañes, Claudia Cazenave, Patricia Encina, Evelyn Pezoa, Vania Portilla, Pilar Reynaldos, Shigri Sánchez Guajardo, and María Luisa Sousa; and, in assistant directing or second-unit directing, María Belén Arenas, Bárbara Della Schiava, and Susana Espinoza, among others.

6.5. The Women Behind the Scripts

Screenwriting has historically been one of the areas with the highest female participation in Chilean fiction, featuring figures such as Luz Croxatto (*Casado con Hijos*), Nona Fernández (*El Laberinto de Alicia*), Coca Gómez (*Machos*), and Catalina Calcagni (*Pacto de Sangre*). Although this participation tends to be concentrated in collaborative or supporting roles rather than as lead writers, the rise of independent content for digital platforms has opened the door to writing teams with greater female representation and to a burgeoning pool of writers with a gender perspective. In the realm of telenovelas, Daniella Castagno stands out as one of Mega's leading head writers, where she has spearheaded projects such as *Al Sur del Corazón*, *La Ley de Baltazar*, and *Edificio Corona*. Castagno has also taken on a mentoring role through workshops where screenwriters such as Claudia Villarroel (*Brujas*) and Isabel Budinich (*Eres mi Tesoro*) began their careers. Another prominent figure is Elena "Nena" Muñoz, an actress and playwright recognized for her theater career and her work on comedy series such as *Aquí Mando Yo*, *Pituca sin Lucas,* and *100 días para Enamorarse*. Joining them are, among others, Milena Bastidas (*Edificio Corona*), Ximena Carrera (*Los Casablanca*), Larissa Contreras (*Nuevo Amores de Mercado*), Josefina Fernández (*Demente*), Marianela Fuenzalida (*Juego de Ilusiones*), María José Galleguillos (*Los Casablanca*), Claudia Hidalgo (*Los Casablanca*), Fernanda Lema (*Generación 98*), Paula Parra (*Papá a la Deriva*), Valentina Pollarolo (*Como la Vida Misma*), Valeria Vargas (*Aguas de Oro*), Fernanda Vivado (*El Jardín de Olivia*), and Bárbara Zemelman (*No Nos Quieren Ver*).[21]

[21] Due to space limitations, only one title is mentioned in each case.

6.6. Challenges for Gender Equity in the Industry

The identification of women behind the camera in Chilean television fiction confirms a Latin American pattern: despite their significant participation in audiovisual production, their history is inconsistently documented in the industry's official archives. This lack of transparency is in itself a relevant finding from a gender perspective, as it reproduces the historical invisibility of women in the audiovisual field.

The Chilean case, however, presents some unique characteristics. On the one hand, there is the presence of strong female characters in the central roles of the television fiction already described; on the other, notable recognition in auteur cinema, where female filmmakers such as Maite Alberdi—whose documentary *La Memoria Infinita* was nominated for an Oscar and won awards at the Goya and Sundance film festivals, among others—demonstrate a rise in female talent that is beginning to reshape the composition of creative teams in the premium segment of national film production. Recovering this history is, in short, an act of epistemic justice and a contribution to a thorough understanding of how the audiovisual culture that shapes collective imaginaries is produced—in a field that must be understood not only as a space for symbolic creation but also as a workplace marked by power asymmetries.

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