

MEXICO: TELEVISION ADAPTS TO FORMATS AND NARRATIVES OF VOD SYSTEMS

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Introduction

After a year of confinement due to the pandemic caused by COVID-19, Mexico slowly began to pick up its pace. The economic pressures, but above all the generalized violence against women that worsened within households, led to the feminist fights and resistances to take the streets once again.

The reason for taking the streets again is that during the pandemic, violence against women increased by 24% and, even worse, 81,6% of the victims were girls and adolescents (ONU-Women, 2021). This violence was not unrelated to the topics shown by fiction TV shows' narratives, since several telenovelas and unitary dramatized shows such as *La Rosa de Guadalupe*, *Vencer el Pasado* or *Contigo Sí* -all Televisa productions- took this issue to denounce impunity about gender-based violence suffered by women.

What was partially left out of the topics of fiction was the pandemic itself, since just a few fiction productions addressed the issue, not only as a news and health event, but also as a sociocultural event, since the effects that COVID-19 caused on Mexicans' lives were not addressed either. Only in dramatized unitary shows such as *La Rosa de Guadalupe* was this topic addressed, same as in the telenovela produced by Juan Osorio: *¿Qué le Pasa a mi Familia?*

Another issue that marked the national media scene was the surly relationship that the President of Mexico, Andrés Manuel López Obrador, held with the media and journalists who criticized his government or his political-ideological approach called "La Cuarta Transformación" (The Fourth Transformation). In addition to this, there is the serious security crisis that Mexican journalist went through, since, according to the Article19 organization, during 2021 were reported "seven murders and 644 attacks against the press, related to journalistic activity, which means an average of one aggression to a journalist because of their work every 14 hours; in these aggressions, the Mexican Government was involved in two out of each five" (Article 19, 2022).

As for the television and telecommunications market, the most important event was, without a doubt, the consolidation of the technical and commercial merger between Televisa and Univision, which will allow them to reach more than 100 million Spanish-speaking viewers every day, by having coverage of 60% of the audience both in Mexico and in the United States.

1. The Audiovisual Context of Mexico in 2021

1.1. Open television in Mexico

Despite the promises of the current federal administration to further democratize open national TV and to analyze, in depth, the current concessions, the truth is that there has been no change at all, since the same national networks and channels remain. Nor have the capacities of public channels been increased.

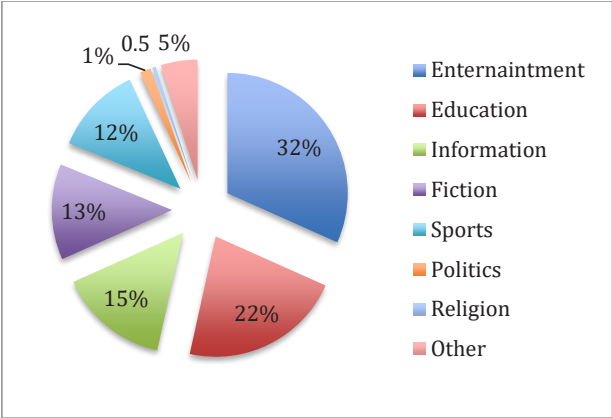
Chart 1. National open television networks/channels in Mexico

Private networks/channels (3)	Public networks/channels (2)
Televisa (Channels 2, 5, 9 y Foro TV)	Once TV (Channel 11 y 11.1)
TV Azteca (Channels 1, 7, Adn 40 y A+)	Conaculta (Channel 22)
Imagen Televisión (Channel 3)	Channel 14
TOTAL NATIONAL NETWORKS/CHANNELS = 12	

Source: Obitel Mexico.

Graph 2¹: Genres and hours broadcast on TV programming

Genres broadcast	Hours of transmission	%
Entertainment	46047	32%
Education	31330	22%
Information	21787	15%
Fiction	18110	13%
Sports	16534	12%
Politics	1787	1,5%
Religion	510	0,5%
Other	7787	5%



Source: Obitel Mexico.

¹ Graph 1 was not made due to lack of information.

1.2. Pay TV and VoD platforms in Mexico in 2021

Although it was predicted that the pandemic would bring a great number of subscribers to pay TV, this did not happen in Latin America where, according to Digital Tv Research, VoD platforms grew their revenues by 97% in the region, while pay TV lost four million subscribers in 2021 (Digital Tv Research, 2022).

In Mexico, according to data from the Instituto Federal de Telecomunicaciones (Federal Institute of Telecommunications), the pay TV market remained the same, and it was Grupo Televisa with its 8.2 million subscribers -with Sky- who leads the sector, having an increase of more than 100 thousand new subscribers in 2021.

During 2021, according to Statista data, the exclusive pay TV channel that was most tuned in Mexico was Star Channel (formerly Fox Channel) with 35% of viewers; the rest of the audience is segmented between children audiences and those who enjoy sports or scientific content.

Chart 2. Pay TV Channels in Mexico

10 most watched pay TV channels in Mexico			
Channel	Genre	Country	Preference percentage
Star	Fiction	USA	35%
Discovery Channel	Information	USA	33%
Fox Sports México	Sports	Mexico	16%
History Channel	Information	USA	13%
TNT	Fiction	USA	12%
National Geographic	Information	USA	10%
Golden	Fiction	Mexico	10%
Disney Channel México	Children	Mexico	9%
ESPN	Sports	USA	9%
Cartoon Network	Children	USA	9%

Source: Statista (2022)².

²To access data go to: <https://es.statista.com/estadisticas/1188311/canales-television-paga-mexico/>

At the end of 2021, according to the National Survey of Audiovisual Content Consumption (Encuesta Nacional de Consumo de Contenidos Audiovisuales: ENCCA), 40% of the Mexican audience watches Netflix, which owns 79% of the market; it is followed by Disney+, although it only owns 7% of the audience's preference, it increases fast due to exclusively offering the Disney, Marvel and Star Wars productions.

Chart 3³. VoD in Mexico

Top active VoD platforms in 2021
Netflix
Disney +
Dish móvil
Amazon Prime Video
Movistar+
Blim
Star+
Apple TV
Cinépolis Klic
Claro-Video
HBO Max
Pluto TV
Paramount+
Acorn-TV
Crunchyroll
Curiosity stream
Filminlatino
Fox Premium
Tubi
Mubi
Plataformacine
Fox Play
Fox Premium
Casa Canibal
TOTAL: 24

Source: Obitel Mexico.

1.3. Independent television fiction production companies

In Mexico, independent companies have grown more and more in recent years. In 2021 the following production companies were the top ones: **Argos Televisión**, which produced for Telemundo the super series *Buscando a Frida*; **Lemon Studios** produced *Control Z* (second season) for Netflix. **BTF Media** produced the long-awaited series about one of the most popular soccer players in the world: *Maradona Sueño Bendito*, which was broadcast on Prime Video, while **W Studios** produced for Televisa-Univision the telenovela *Si nos Dejan*, based on the Colombian

³ This Chart does not include YouTube channels, nor open or pay TV Networks.

story *Señora Mujer*, by Bernardo Romero y Mónica Agudelo, and which in 1997 would be the successful telenovela *Mirada de Mujer*.

1.4. Sources of financing for the audiovisual sector

Despite the background of economic losses reported by the media and telecommunications market in Mexico the previous year, during 2021 the main company in this sector, Grupo Televisa, obtained a net profit of \$5.387 billion pesos at the end of 2021, with this, it was possible for the company to partially recover from the economic loss of \$1.250 billion pesos generated during the pandemic in 2020⁴.

This injected economic life into the television fiction market, which was evident in the increase of new national productions, unlike what happened in 2020, when production decreased.

1.5. Communication policies

The highlight in this area is that on September 6, 2021, the agreement that issues the Estrategia Digital Nacional (EDN) 2021-2024 (National Digital Strategy 2021-2024) was published in the Diario Oficial de la Federación (Federal Official Gazette). This instrument is the roadmap for the federal administration to guide technology and security efforts and initiatives. This strategy has two objectives: 1) Technological independence, which implies not being subject to commitments and conditions arbitrarily imposed by technology providers or manufacturers, to avoid monopolies and determined dependencies; and 2) Technological autonomy, in order to guarantee the possibility of generating its own technical solutions and to make the most of the available technical talent.

Some of the criticism of this strategy is that media literacy campaigns are not being considered in parallel, but neither is it granting greater strength to regulatory authorities such as the Federal Institute of Telecommunications, and if this is not given coercive powers, there will be a risk of having a concentrated telecommunications market and in which the State depends more and more on its infrastructure.

1.6. Digital and mobile connectivity infrastructure

In Mexico, by 2021, there were 84.5 million internet users, with people between the ages of 16 and 64 connecting, on average, from 8 hours to 55 minutes. During the pandemic, there was an accelerated growth in contracting internet services, due to virtual classes and work. However, there is still a large digital divide, since more than 30 million Mexicans do not have access to the internet, that is, a quarter of the total population. The reasons for this gap can be several: low purchasing power, lack of interest/no need, lack of digital skills, lack of connectivity device⁵.

⁴ See information at: <https://www.elfinanciero.com.mx/empresas/2022/02/24/televisa-respira-revierte-perdidas-y-cierra-2021-con-mas-de-5-mil-mdp-de-utilidad/>

⁵<https://www.theciu.com/publicaciones-2/2021/5/23/hbitos-de-los-usuarios-de-internet-en-mxico-2021>

Regarding cell phone penetration, data provided by *The Competitive Intelligence Unit* show that in Mexico there are more cell phones than inhabitants, which means that teledensity has been reached. In Mexico, 92,4% of cell phones are smartphones, therefore, Mexico is one of the countries with the highest levels of competition between smartphones’ manufacturers.

In relation to the use of social networks, 100 millions of Mexicans are active users, being YouTube (96,3%); Facebook (95,3%); and WhatsApp (91,3%), the three most used.

2. Analysis of the year: National and Iberoamerican premiere fiction on open TV

Table 1. Premier fiction titles broadcast in 2021
(national, foreign -OBITEL area-, and coproductions)

National premiere titles: 16 Televisa: 12 nacional titles 1. <i>Te Acuerdas de Mí</i> (telenovela) 2. <i>Fuego Ardiente</i> (telenovela) 3. <i>¿Qué le Pasó a mi Familia?</i> (telenovela) 4. <i>Diseñando tu Amor</i> (telenovela) 5. <i>Si Nos Dejan</i> (telenovela) 6. <i>La Desalmada</i> (telenovela) 7. <i>Vencer el Pasado</i> (telenovela) 8. <i>S.O.S Me estoy Enamorando</i> (telenovela) 9. <i>Contigo Si</i> (telenovela) 10. <i>Mi Fortuna es Amarte</i> (telenovela) 11. <i>La Fuerza del Destino</i> (telenovela) 12. <i>La Rosa de Guadalupe 16</i> (Unitary) 13. <i>Como Dice el Dicho 11</i> (Unitary) 14. <i>Esta Historia me Suena 4</i> (Unitary) TV Azteca: 1 national title 15. <i>Un Día para Vivir</i> (series) Imagen TV: 1 national title 16. <i>La Taxista</i> (telenovela) Canal Once: 0 national titles Canal 22: 0 national titles CO-PRODUCTIONS - 0	Foreign premiere titles OBITEL: 9 Televisa: 4 imported titles 17. <i>100 Días para Enamorarnos</i> (series-USA/Hispanic). 18. <i>Buscando a Frida</i> (series-USA/Hispanic). 19. <i>Enemigo Íntimo</i> (series-USA/Hispanic). 20. <i>Mariposa de Barrio</i> (series-USA/Hispanic). TV Azteca: 2 imported titles 21. <i>Las Enfermeras</i> (telenovela/Colombia) 22. <i>Betty, La Fea</i> (telenovela/Colombia) Imagen TV: 3 imported titles 23. <i>Pedro El Escamoso</i> (telenovela /Colombia) 24. <i>Un Poquito Tuyo</i> (telenovela/Chile) 25. <i>Vuelve Temprano</i> (telenovela/Chile) Canal Once: 0 imported titles Canal 22: 0 imported titles Non OBITEL foreign titles: 2 Imagen TV: 2 imported titles 26. <i>Esposa Joven</i> (series -Turkey) 27. <i>Hercai</i> (series - Turkey) Reruns National titles: 8 Televisa: 2 titles 28. <i>Sortilegio</i> (telenovela) 29. <i>Corazón Indomable</i> (telenovela) TV Azteca: 3 titles 30. <i>Cuando Seas Mía</i> (telenovela) 31. <i>Lucho en Familia</i> (series) 32. <i>Amor en Custodia</i> (telenovela) Imagen TV: 1 title 33. <i>Muy Padres</i> (telenovela) Canal Once: 2 titles 34. <i>Soy tu Fan</i> (series) 35. <i>Kipatla</i> (series)
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Source: Obitel Mexico.

In 2021, 16 unreleased national titles premiered, this shows that the television fiction market is stabilizing after the drop in production in 2020. It is notable, as well, during 2021 TV Azteca and Imagen TV premiered fiction titles, which they had not done since 2018; this year TV Azteca did so with *Un día para vivir*.

**Table 2. National premiere fiction in 2021
and its evolution in the five-year period**

Year	Titles	%	Hours	%
2017	27	66	1545:00	52,16
2018	28	80,0	1807:00	84,0
2019	25	80,0	1146:00	83,0
2020	13	62,0	906:20	51,0
2021	16	57,0	853:00	45

Source: Obitel Mexico.

Table 2 shows how, little by little, the production and premiere of national television fiction titles has decrease, which can be explained due to the low investment of television stations in this format, since in recent years they have chosen other formats such as reality shows like *Master Chef* or *Exatlón*, in their Mexican versions. Of the total number of premieres, 14 are from Televisa, which is why this company continues to dominate fiction production, given that TV Azteca has preferred to produce reality shows, while Imagen TV broadcasts foreign telenovelas.

**Table 3. Formats of national premiere fiction in 2021
and its evolution in the five-year period**

Format	Titles					Hours				
	2017	2018	2019	2020	2021	2017	2018	2019	2020	2021
Telenovela	17	10	14	5	12	1245:00	985:00	750:00	426:00	775:00
Series	11	14	9	5	1	232:00	455:00	298:50	249:20	50:00
Miniseries	0	0	0	0	0	0:00	0:00	0:00	0:00	0:00
Telefilm	0	0	0	0	0	0:00	0:00	0:00	0:00	0:00
Unitary	1	4	2	3	3	152:00	367:00	167:00	231:00	324:00
Docudrama	0	0	0	0	0	0:00	0:00	0:00	0:00	0:00
Other	0	0	0	0	0	0:00	0:00	0:00	0:00	0:00

Source: Obitel Mexico.

If we compare the growth of TV formats in the last five years, what we observe is that the produccion of telenovelas has gradually decreased, since 1.245 hours of fiction (telenovelas) were produced in 2017, while in 2021 only 775, which means 48% fewer hours. Production of series also decreased, only six were produced during 2020 and 2021, but it was because of the pandemic.

Table 4. Premiere Fiction broadcast in 2021: countries of origin

Country	Titles	%	Hours	%
NATIONAL (total)	16	64	853:00	45
OBITEL COUNTRIES (total)	9	36	1041:00	55
Argentina	0	0	0:00	0
Brazil	0	0	0:00	0
Chile	2	8	195:00	10
Colombia	3	12	572:00	30
Ecuador	0	0	0:00	0
Spain	0	0	0:00	0
USA Hispanic	4	16	274:00	15
Mexico	16	64	853:00	45
Peru	0	0	0:00	0
Portugal	0	0	0:00	0
Uruguay	0	0	0:00	0
Venezuela	0	0	0:00	0
CO-PRODUCTIONS (Total)	0	0	0:00	0
National Co-productions	0	0	0:00	0
Obitel countries Co-productions	0	0	0:00	0
TOTAL	25	100	1894:00	100

Source: Obitel Mexico

With 16 titles, the national fiction market seems to breath again; however, the high-light of this year is that channels that did not produced fiction in recent years began to do so in 2021, like TV Azteca (*Un Día Para Vivir*) and Imagen TV, with the ad-aptation of *La Taxista*.

Table 5. National and Iberoamerican fiction formats broadcast in 2021

Format	Titles				Hours			
	National	%	Obitel area	%	National	%	Obitel area	%
Telenovela	12	75	0	0	775:00	67,5	0:00	0
Series	1	6,2	6	66,7	50:00	4,5	184:00	17,7
Miniseries	0	0	0	0	0:00	0	0:00	0
Sitcom	0	0	0	0	0:00	0	0:00	0
Unitary	3	18,8	3	33,3	324:00	28	857:00	82,3
Docudrama	0	0	0	0	0:00	0	0:00	0
Other	0	0	0	0	0:00	0	0:00	0
Total	16	100	9	100	1149:00	100	1041:00	100

Source: Prepared by OBITEL with national data supplied by Nielsen Ibope México, S.A. de C.V. Software MSS TV, Base “Rating regular 5 dominios +Dish. Total television programming during 2020.

Although fiction broadcast of the Obitel area had grown in the last three years, this year had -as in 2020- a decrease. The reason is the reformulation of the programming lineup of the channel previously known as Galavisión, today called Canal Nu9ve, where telenovelas from Univision or Telemundo used to be broadcast.

Table 6: Ten most watched titles in 2021

Title		Channel	Produced by	Format/genre	Number of episodes in 2020	Time-slot	Rating	Share
1	<i>La Desalmada</i>	Channel 2	Televisa	Telenovela/Drama	152	Afternoon	18,64	29,09
2	<i>Vencer el Pasado</i>	Channel 2	Televisa	Telenovela/Drama	95	Prime time	16,94	25,61
3	<i>Mi Fortuna es Amarte</i>	Channel 2	Televisa	Telenovela/Drama	86*	Prime time	15,55	23,51
4	<i>Si Nos Dejan</i>	Channel 2	Televisa	Telenovela/Drama	36	Prime time	15,37	26,65
5	<i>Qué le Pasa a mi Familia</i>	Channel 2	Televisa	Telenovela/Comedy	102	Afternoon	15,28	23,31
6	<i>La Rosa de Guadalupe</i>	Channel 2	Televisa	Unitary / Drama	156	Afternoon	14,77	23,43
7	<i>Como Dice el Dicho</i>	Channel 2	Televisa	Unitary / Drama	142	Afternoon	14,31	25,69
8	<i>Te Acuerdas de Mi</i>	Channel 2	Televisa	Telenovela/Drama	76	Prime time	13,44	20,75
9	<i>S.O.S. Me Estoy Enamorando</i>	Channel 2	Televisa	Telenovela/Comedy	120*	Afternoon	12,41	21,32
10	<i>Diseñando tu Amor</i>	Channel 2	Televisa	Telenovela/Drama	120	Prime time	12,38	25,34
Total National productions: 3				Foreign original scripts: 7				

Source: Prepared by OBITEL with national data supplied by Nielsen Ibope México, S.A. de C.V. Software MSS TV, Base “Rating regular 5 dominios +Dish. Total television programming during 2021. (*): In the case of *Mi Fortuna es Amarte* and *S.O.S. Me Estoy Enamorando*, its broadcasts began in 2021 and ended in 2022.

As usual, Televisa dominates the “Top Ten” in Mexico; however, it is important to notice that this year -unlike the past three years- *La Rosa de Guadalupe* was not up in the chart of preferences; and the top position is for the telenovela *La Desalmada*, a revenge story of a woman victim of sexual abuse and whose husband is murdered. Attached to the melodramatic genre, love would be the only thing to make her stop her revenge, to open up to a new relationship. It is also noteworthy that only three scripts of the “Top Ten” titles are Mexican, the rest are foreign, and two of them stand out: *¿Qué le Pasa a mi Familia?*, which is a South Korean script, and *Te Acuerdas de Mí*, based on a Turkish production.

Table 7: Profile of the audience of the 10 titles most watched:
gender, age, socio-economic status

Titles		Channel	Gender %		Socio-economic status %			
			Women	Men	ABC+	C	D+	DE
1	<i>La Desalmada</i>	Channel 2	10,9	6,8	3,8	8,5	10,5	15,1
2	<i>Vencer el Pasado</i>	Channel 2	10,1	6,1	3,2	7,9	9,5	13,4
3	<i>Mi Fortuna es Amarte</i>	Channel 2	9,3	5,5	2,8	6,9	8,2	15,1
4	<i>Si Nos Dejan</i>	Channel 2	8,9	5,7	3,3	6,8	8,7	14,0
5	<i>¿Qué le Pasa a Mi Familia?</i>	Channel 2	8,8	5,4	2,7	7,1	7,6	14,1
6	<i>La Rosa de Guadalupe</i>	Channel 2	8,7	14,0	2,8	6,4	7,9	14,0
7	<i>Como Dice el Dicho</i>	Channel 2	7,8	4,4	3,0	5,6	7,0	11,2
8	<i>Te Acuerdas de Mi</i>	Channel 2	8,3	4,7	3,1	6,8	7,0	10,4
9	<i>S.O.S. Me Estoy Enamorando</i>	Channel 2	7,1	3,9	2,1	5,9	5,9	12,2
10	<i>Diseñando tu Amor</i>	Channel 2	7,1	3,9	2,1	5,0	6,7	9,0
Titles		Age group %						
		04-12	13-18	19-29	30-44	45+	-	-
1	<i>La Desalmada</i>	8,3	8,1	6,2	9,2	11,8	-	-
2	<i>Vencer el Pasado</i>	7,8	7,8	6,2	7,7	11,1	-	-
3	<i>Mi Fortuna es Amarte</i>	7,7	7,4	5,5	7,8	10,1	-	-
4	<i>Si Nos Dejan</i>	7,2	7,4	5,0	7,9	10,1	-	-
5	<i>¿Qué le Pasa a Mi Familia?</i>	7,2	7,1	5,8	6,4	9,6	-	-
6	<i>La Rosa de Guadalupe</i>	7,8	7,0	5,5	6,4	9,6	-	-
7	<i>Como Dice el Dicho</i>	7,1	5,6	4,7	5,9	8,2	-	-
8	<i>Te Acuerdas de Mi</i>	6,2	5,2	4,6	5,6	9,6	-	-
9	<i>S.O.S. Me Estoy Enamorando</i>	5,9	4,9	4,5	5,4	8,2	-	-
10	<i>Diseñando tu Amor</i>	5,4	5,3	3,7	4,8	8,1	-	-

Source: Prepared by OBITEL with national data supplied by Nielsen Ibope México, S.A. de C.V. Software MSS TV, Base “Rating regular 5 dominios +Dish. Total television programming during 2021.

As has been a constant in the last five years, the profile of the audience that consume fiction in Mexico is: women over 45 years of age who belong to D+ and DE socio-economic status. It is also important to notice the increase in viewing from children and young people, being audiences that had walked away from TV. One answer, that requires more empirical density, is that National open TV was, in some cases, the only entertainment option during the pandemic.

3. VoD Monitoring 2021

3.1 VoD Platform market in 2021

As we had pointed out in 2020, also in 2021 there was an increase of SVoD subscriptions in Mexico, we believe this is largely due to the Covid-19 pandemic. The platforms that have grown the most in the number of subscriptions are Disney+ and HBO Max. We consider that, despite the fact that Netflix has over 4.500 titles in Mexico, perhaps the way in which content is displayed has tired the audience, by not finding new and attractive titles; in addition, there is great competition between platforms and its subscription prices. Netflix prices are the highest of all platforms: \$139 pesos (\$6.82 USD) basic account; \$266 pesos (\$13.06 USD) Premium account. It should be noted that several telecommunications companies such as Telmex offer their subscribers a combo that includes internet service plus access to platforms such as HBO Max, Disney+ and Star+ (only for one month), and Claro Video. They also offer Netflix, but at an additional cost. 27% of streaming platforms users are subscribed to two of them, and 17% to three or more⁶. Many users share their passwords to friends or family, and it is because of this that the growth results have not been as expected.

According to data from the consulting firm *The Competitive Intelligence Unit*, it is believed that 57% of SVoD users in Mexico use some platform to watch TV content online. Data from the same company indicate that the distribution of subscription TV is divided as follows: 34% for Satellite TV, 22% for Cable TV, and 44% for OTT⁷. The SVoD subscription model is preferred in the country, with 74% users, while the model that includes advertising is used by 71% of users, and the third position is for TV Everywhere with 40% of users. Free content on VoD had 15% of preferences, and 12% did not see content online⁸.

As can be seen in Chart 3 of this chapter, OTT platforms offering has increased in Mexico, some of them are independent and offer non-commercial content, such as movies or productions that have won awards at international film festivals.

⁶ <https://www.milenio.com/negocios/usuarios-plataformas-streaming-crecieron-mexico-2021>

⁷ <https://www.eleconomista.com.mx/arteseideas/Fatiga-de-suscripcion-modifica-habitos-de-consumo-en-plataformas-de-streaming-20211111-0026.html>

⁸ <https://www.reporteindigo.com/indigonomics/mexico-y-el-streaming-pais-de-espectadores-en-linea/>

Regarding the profits from OTT platforms, the Federal Institute of Telecommunications estimates annual revenues of 1.899 billion dollars. This is explained given the incursion of actors like Disney+, HBO and Paramount. In the last four years, profits have tripled, going from 621.1 million dollars to 1.899 billion dollars.

3.2. Local VoD platforms supply in 2021 (national, regional within the country)

In Mexico, several platforms that supply VoD content now are used for free. In 2021 BLIM offered up to 40 channels on its live platform. Its catalog mainly included telenovelas, premiere and classic films, classic and recent Mexican cinema, Mexican and international series, telenovelas such as *Muchachitas*, *Sortilegio*, *Teresa*, among others. By mid-2021, it included advertising on its platform, so it became free of charge. By 2021, it had around 9% of the streaming subscriptions in the country.

Another platform that has established itself in Mexico, and that is offered free of charge to those who acquire the Telmex service (fixed telephony + internet) is **Claro-Video**. This platform belongs to América Móvil, whose owner is Carlos Slim. Its access modality is mixed, since it offers free content, as well as for rent and sale.

On another hand, **Dish móvil** also offers on-demand content. For Dish customers (satellite TV) content is provided free of charge. Its catalog includes series, movies, and special live events. In Mexico, the company is losing more and more subscribers, because it has eliminated content on its channels so as not to raise the cost of subscription to satellite TV. This company is owned by MVS Comunicaciones.

The **Cinépolis Clic** platform does not request a subscription, rather the user pays only for the content they wish to watch, either for purchase or rent. Its catalog mainly offers movies. The owner of the platform is the Ramírez Organization, owners of one of the most powerful film exhibition chains: Cinépolis.

An independent company for promoting Mexican cinema is **filminlatino.mx**. It was founded after the former director of the Instituto Mexicano de Cinematografía (Mexican Institute of Cinematography), Jorge Sánchez, met with one of the partners of the Spanish platform filmin. The idea from this meeting was to digitize a good part of the production of Mexican cinema. In its catalog it has films by filmmakers such as Arturo Ripstein, Carlos Reygadas, among others, as well as films that have been released at national and international film festivals; it also offers series. It provides content for free, but there are also subscriptions at a cost of \$80 pesos (\$4 USD) per month.

On the other hand, **plataformacine** offers movie rental services without subscription. Like Cinépolis Clic, you only pay for what you watch. It mainly offers independent and award-winning Mexican films. It was created at the initiative of the Universidad Nacional Autónoma de México and the Cineteca Nacional.

Casa Caníbal was created by the production and distribution company Cine Caníbal. Their catalog provides content for sale or rent including their own productions, but also cult movies, classic, comedy, queer films, among others.

3.3. VoD analysis in 2021: national premiere fiction and co-productions

By 2021, we observe that the percentage of national premieres on streaming platforms decreased. In 2019 we point out that Netflix produced six series, in 2020 there were seven productions, while in 2021 the company produced eight, being the only VoD platform that increased its Mexican productions. But unlike Netflix, Prime Video produced five series in 2019, five again in 2020, and only three in 2021. The Claro-Video platform produced only one series in 2019, and in 2020 it showed a notable increase in its productions as it premiered six series, but in 2021 it again decreased its production series and only premiered one.

For its part, Televisa’s Blim, in 2019 produced six series, in 2020 it only produced one, same as in 2021, which is the series titled *40 y 20*. Based on the data released, Mexican premiere productions have dropped from 2019 to 2021, by 37%.

Table 8. National fictions and co-productions displayed in 2021 in VoD systems

NATIONAL PREMIERE TITLES	CO-PRODUCTIONS
Netflix – 8 national titles 1. <i>Madre Solo Hay Dos</i> (Series) 2. <i>¿Quién Mató a Sara?</i> (Series) 3. <i>Somos</i> (Miniseries) 4. <i>Guerra de Vecinos</i> (Series) 5. <i>Todo Va a Estar Bien</i> (Series) 6. <i>La Venganza de las Juanas</i> (Series) 7. <i>Maya y los Tres</i> (Series) 8. <i>Control Z</i> (2nd season) (Series)	Netflix – 1 title 1. <i>Élite</i> (4th season, series) – Spain.
Amazon Prime – 2 national titles 9. <i>De Brutas, Nada</i> (series) 10. <i>El Juego de las Llaves 2</i> (series)	
Claro Video: 11. <i>La Negociadora</i> (Series)	
Blim: 12. <i>40 y 20</i> (series, 6th and 7th seasons)	
Total: 12	Total: 1

Source: Obitel Mexico.

3.4. Narrative features of VoD in 2021

In 2019, Netflix established in Mexico their production and marketing offices for the Latin American region. The objective was to increase the number of original productions directed both for the Mexican (mainly) and Latin American market. This has meant a gradual increase in the production of series; that is the reason why eight series were premiered in 2021.

These series explored not only various themes but also various genres: drama, suspense and comedy; *Todo Va Estar Bien* is a notable production as it is the debut as series director of the renowned Mexican actor, Diego Luna, and which portrays a couple in Mexico City who ended up forming a diverse family.

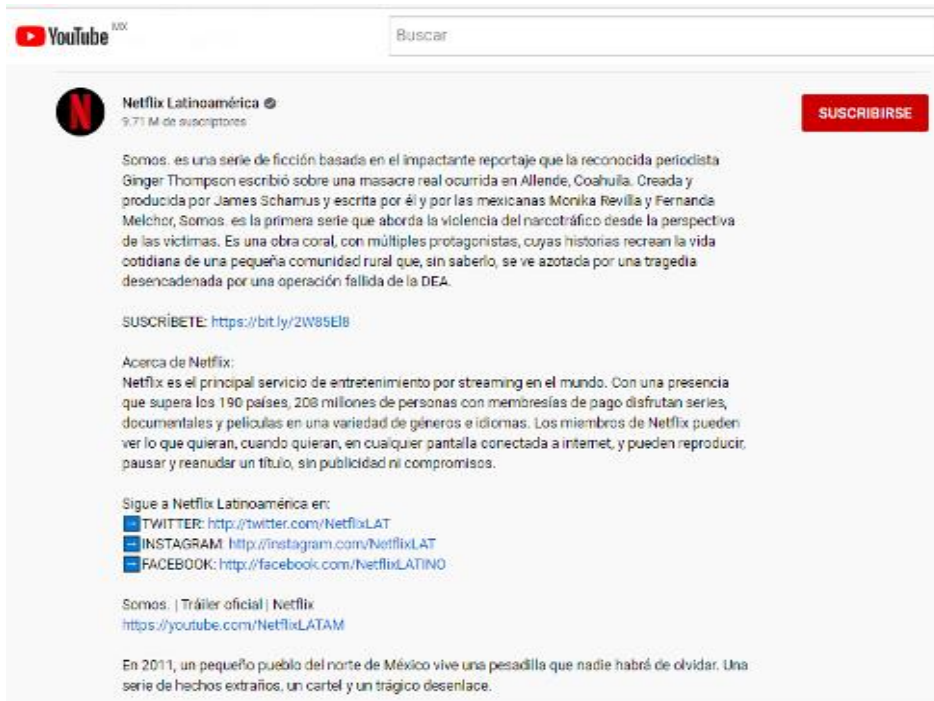
Likewise, it stands out the miniseries *Somos*, a story based on the journalistic investigation of Ginger Thompson: “*Anatomía de una masacre*” (Anatomy of a massacre) that explains how it was the massacre of Allende, Coahuila, in 2011, by the cartel Los Zetas, and that it was triggered by a failed DEA operation in Mexico. The miniseries portrays the massacre that occurred in Allende, between March 18 and 21, 2011, and which caused the disappearance and death of more than 300 people. In the words of its producers, the aim was to offer audiences the other face of the “drug war”, since -until now- other series have focused on portraying narco figures, thus making invisible the violence and pain this causes to the victims.

Lastly, and regarding Netflix productions in Mexico, it is noteworthy that comedy has been the central element of series such as *Guerra de Vecinos* and *Madre Solo Hay Dos*, which enlarge the number of productions, movies included, going for this approach in this platform. That same comedy series approach was taken by platforms such as Blim and Prime Video with series like *40 y 20* and *De Brutus, Nada*, respectively. While Claro-Video chose a different road with *La Negociadora*, that addressed the drama of a hijacked company, for which a woman police officer who is one of the best negotiators is invited to help.

4. Interactivity and audience participation: The series *Somos*

For this section we decided to present the type of marketing strategies that the industry has used to promote the series *Somos*. This was a Netflix production and premiered on this same platform on June 30, 2021, and narrates the testimonies of people involved in the massacre (people responsible for it and also victims) of more than 300 people in the town of Allende, Coahuila, Mexico, by the organized crime. The production was based on the journalistic work by Ginger Thompson, published in 2017. The series has six episodes, and stars Alejandro Ruiz, Jero Medina and Areli González, among other non-professional actors.

The producer of this series is James Shamus, and dozens of people were interviewed to play the various roles, all Mexicans. It is important to point out how this series that narrates these serious events that occurred in Mexico was publicized to get viewers.



(Translation below)⁹

Netflix Latin America publicized the series on social networks such as YouTube, as well as the official trailer on the platform's page. We did not find social networks created specially to publicize the series, as Netflix has done for other of its productions, but we did find mentions on the company's official channels. It is only through the social networks of Netflix Latin America that the premiere of the series was publicized (Twitter, YouTube, Facebook).

⁹ *Somos* is a fiction series based on the striking story that the renowned journalist Ginger Thompson wrote of a true massacre that occurred in Allende, Coahuila. Created and produced by James Schamus and written by him and by Mexicans Monika Revilla and Fernanda Melchor, *Somos* is the very first series to address narco and drug violence from the victims' perspective. It is a choral work, with multiple protagonists, whose stories recreate the daily life of a small rural community that, without knowing, is hit by a tragedy triggered by a failed DEA operation.

SUBSCRIBE: <https://bit.ly/2W85E18>

About Netflix:

Netflix is the leading streaming entertainment service in the world. With a presence that exceeds 190 countries, 208 million people with paying memberships enjoy series, documentaries and movies in a variety of genres and languages. Netflix members can watch what they want, when they want, on any screen connected to the internet, and can play, pause and resume a title, with no ads or commitments.

Follow Netflix Latin America on:

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INSTAGRAM: <http://instagram.com/NetflixLAT>

FACEBOOK: <http://facebook.com/NetflixLATINO>

Somos. | Official Trailer | Netflix

<https://youtube.com/NetflixLATAM>

In 2011 a small town in the North of Mexico lived a nightmare that no one would be able to forget. A series of strange events, a cartel and a tragic ending.



(Source: <https://www.facebook.com/page/684961094904799/search/?q=Serie%20Somos>
Translation below¹⁰

We found that only a very basic level of publicity was given to the series on social media: we got some notes in national media publicizing the premiere, as well as emails advertising the series.



Source: authors' personal email.

Also, virtual events were held, such as the one at Columbia University in the United States, where the series was publicized:

10 *Somos*

The story of a tragedy. The violence of organized crime has marked Mexico's reality and fiction in recent decades.

Somos shows us the point of view of the victims of a true massacre, through different fiction stories. A massacre that occurred in 2011, in Allende, Coahuila, a small town nearby the US border. Starring actors like Alejandro Riuz and Mercedes Hernández, and real inhabitants of northern Mexico. Despite the fact that non official numbers speak of hundreds of victims, the massacre of Allende was ignored for years.

Somos is on Netflix and is based on the journalistic story “Anatomía de una masacre” by Ginger Thompson.)



Source: <https://twitter.com/sofheyman/status/1413549185526284293>

Regarding the reception of the series, due to the serious problems it portrays, there are conflicting opinions, since some people have stated that the series barely represents a part of the reality lived in Allende, Coahuila.

In this regard, the writer of *Somos*, Mónica Revilla, wrote in a column in *The Washington Post* that what they sought with the series was to create:

“An *anti-narcoseries*, the counterpart of the prevailing television narratives. To do so, we needed to approach the whole process differently or we risked falling into the same vices. The first thing was to change the point of view from where we were going to tell the story. Instead of giving a voice —once again— to the drug traffickers, the approach was to tell the experiences of the victims. In other words, we decided to make leading roles of the characters that would normally be the extras in the *narcoseries*” (Revilla, 2021).

And she continues:

“*Somos* is not about the eccentricities of the brothers Omar and Miguel Ángel Treviño, former leaders of Los Zetas, it is about the brave people of Allende who dared to speak out about what narco traffickers did in their community” (Revilla, 2021).

For her, this type of fiction, although it is not its main objective, does contribute to creating awareness and memory about the recent past; it is because of this that creating an *anti-narcoseries* means betting that fiction does not contribute to the violence that plagues the country is trivialized, because in her words: “those narratives do not contribute anything to understand what we are experiencing as a country”. Fictions such as *Somos*, as Sánchez (2022) says, become pedagogies of

popular culture because they help people to resignify the past by different facts and events being updated in the present and shown to them.

Next, we present some comments that various audiences wrote on the *Somos* trailer, which was published on the YouTube platform:



Source:YouTube Mexico.
(Translation below)¹¹

These comments point out how relevant the series was because it showed people for the first time the victims’ suffering and not just the “heroism” of the narco-traffickers; they also emphasized that, after watching the series, they were able to learn about a massacre that they were unaware of, which also allowed them to understand that these tragedies, unfortunately, have not ended.

¹¹ **zA Mi**

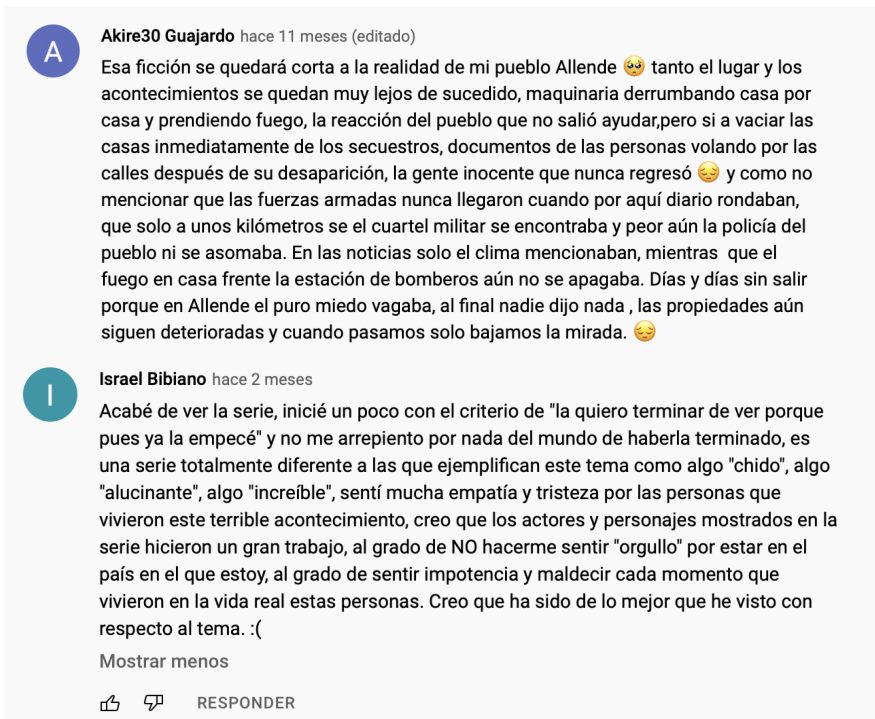
The story of the massacre of Allende, Coahuila.
I just hope that they focus on the victims, people that just because they were walking on the streets were murdered. Hundreds of innocents were killed.
Stop putting narco-traffickers on altars as they always do in the series.

Citli Soto S

I finished watching the series and this is one of the series that has made the strongest impression on me, to the point that I was in shock since despite I’m a Mexican I didn’t know anything about this event, it seems that there was a media silence about the issue.
I am scared to think this happened in my own country and I am deeply sad at the same time.

Historian Antonio Montoya

I am from Gómez Palacio, Durango, next to Torreón, although I fled to Mexico City, I still remember the violence experienced first hand. This advertisement makes me cry. I became a Historian and now I am working on a thesis on “The war against the narco” during Calderon’s administration. I will never forget what soldiers did to me in 2010. I was sexually assaulted.



Source:YouTube Mexico.
(Translation below)¹²

We believe that Netflix’s decision to produce a series about an event as sensitive as what happened in Allende, Coahuila, reveals the company’s interest in bringing to common knowledge violent events that have been silenced, aiming to show what really happened in Allende. And that, given the opacity about the event, the audience may be interested in watching this kind of content, although as some subjects who have already watched the series claim, reality exceeds what is represented in *Somos*.

¹² **Akire30 Guajardo**

This fiction falls short in portraying the reality of my town Allende, both the place and events they just don’t go far enough on what happened: machinery demolishing house by house and setting fires, the reaction of the people that did not came out to help, but did went to ransack houses just after kidnaps, flying on the streets there were personal documents of people that had just disappeared, innocent people that never came back. And I have to mention that the military never showed up, when they used to be around all the time, when the military barracks were just a few kilometers away, and de town police, even worse, they didn’t even go out. In the news, they just talked about the weather report, while the house across the street from the fire department remained on fire. Many days people were locked up in their houses because there was fear all over Allende. At the end nobody said anything. Many properties remain damaged, and when we pass by we just look away.

Israel Bibiano

I finished watching the series. At the beginning, I was a little bit under the premise “I’ll watch it to the end just because I already started”. And I don’t regret it at all. Is a series that is totally different to other ones that address this topic as something “cool”, something “fascinating”, something “amazing”, I felt a lot of empathy and sadness for all the people who lived this terrible event, I think that the actors and people portrayed on the show did a great job, to the point I don’t feel any “pride” for my country, to the point of feeling helplessness and to curse every moment that the real people had to go through. I believe this has been one of the best series that I’ve watched regarding this topic.)

5. Highlights of the year 2021

As we pointed out up in the introduction, the disruption generated in the country by the various feminist resistances has not been left out of the narratives of television fiction, and proof of this is that, for the third consecutive year, Televisa produced and premiered a telenovela focused on talking about the various forms of violence that cross the lives of Mexican women belonging to different generations.

“Vencer” is a trilogy of telenovelas that revolve around four women from different generations, who represent problems such as gender violence, teenage pregnancy, bullying and harassment, as well as cyberbullying, rape, etc.

In 2021, *Vencer el Pasado* was premiered, and its four cases were: Renata, who fought against digital harassment; Carmen, who confronts the social prejudices suffered by adult women; Dana, who has to overcome the loss of her lifestyle and is addicted to social networks where she’s victim of digital violence; and Mariluz, also a victim of digital violence that forced her to leave her home.

With a more realistic approach than past Televisa productions also focused on portraying women’s problems -such as the unitary classic *Mujer, Casos de la Vida Real*, “Vencer...” has consolidated itself as a widely accepted telenovela due to its treatment of gender-based violence, which is proven by the fact that its three productions are among the ten most watched fictions in Mexico over the last two years.

Another element to highlight, talking about telenovelas that with a gender approach turned national productions upside down, is the broadcast on Televisa of *Si Nos Dejan*, which is a remake -although on a different television station- of the successful *Mirada de Mujer*, telenovela produced by TV Azteca in 1997, which was the first telenovela not produced by Televisa to lead the preferences of Mexican audiences.

2021 was also relevant because *La Rosa de Guadalupe*, the most important Mexican fiction product in the last decade, ceased to be the most watched by the Mexican audience: from being in the first places in the last three years, it now ranked sixth place. This happens alongside the fifteenth anniversary of this show on the air, which was on February 22, 2022, the date on which the unitary show had broadcasted a total of 1.680 episodes.

Álvaro Cueva, the most important television critic in Mexico, pointed out that *La Rosa de Guadalupe* should be considered a television phenomenon because it addressed various social issues that, before the existence of the show, were not addressed on national television; however, it is relevant to point out that many of these issues, insofar as their social relevance, turned out to be minimized after “the miraculous effect of the white rose” that ends up overriding the agency of the victim characters, because in the end they were not the ones who resolved their problems, but the miracle that overshadow other individual or collective ways to solve the conflict.

Something to highlight in the field of national fiction is that in 2021 it stopped the trend of producing bioseries and the remake of classic Mexican telenovelas (what Televisa called “The Factory of Dreams”); however, the trend will recover in 2022 with the premiere of *Los Ricos Tambien Lloran* and the production of the bioseries *El Último Rey: el Hijo del Pueblo*, which narrates the life of the Mexican singer Vicente Fernández, who died on December 12, 2021.

Portraying the life of this singer also involved a legal dispute between the Fernández family, Televisa and Netflix, because of the exploitation rights of the “Vicente Fernández” trademark. The problem is that the Televisa production was made without the consent of the family and based on the unauthorized biography: *The Last King*, by Olga Wornat, published in 2021.

While the Netflix series, which is yet to be released, was made in agreement with Vicente Fernández himself, who in 2019 signed the rights for the platform and Caracol Tv, from Colombia, to portray his life.

6. Topic of the year 2021

Transformations in television seriality and its impact on Mexican television fiction formats in times of streaming

The successful emergence of SVoD systems is having a significant impact on television fiction formats and their narrative strategies, which can be seen both on open television, cable television or on digital platforms (Piñón & Lacalle, 2022). Thus, in this section we aim to report how the narrative structures of television fiction and its formats have been transformed in Mexico.

In recent years in Mexico, we have observed that Televisa has produced telenovelas with a smaller number of episodes and with a type of narrative that is more in line with series style. One of the first telenovelas to undergo these changes was *Mujeres de Negro*, starring Mayrín Villanueva, Alejandra Barros and Ximena Herrera, which aired in 2016. In the style of a thriller, broadcast in prime time, the story is about three women who decide to murder their husbands, and they are complicit in keeping their secrets. This telenovela was broadcast as a series, and had only 51 episodes.

In 2016 there was another change regarding format and content, when Televisa produced the bioseries *Por Siempre Joan Sebastian*, which portrayed the life of the singer of the same name. In 2017, Televisa produced the telenovela *La Doble vida de Estela Carrillo*, this story was also presented in a smaller number of episodes than what the company usually did (around 120-130); but in this case, this melodrama had only 72 episodes, and this production addressed the topics of Mexican emigration and regional music. This telenovela starred Ariadne Díaz and David Zepeda.

A production that already showed what would come with the Televisa-Univision merger is *La Piloto*, which is a television series produced by W Studios and Lemon Studios for Televisa and Univision; the second season was broadcast on El Canal de las Estrellas (Channel 2 on Mexican open TV) and had 81 episodes of 41-44 minutes each. The first season premiered on Univision. The story revolves around the life of Yolanda Cadena, whose dream is to fly planes. This series obtained a rating of 14,2 points. Also in 2017, *En Tierras Salvajes* (69 episodes) was premiered, starring actors Claudia Álvarez and Diego Olivera.

With these telenovelas, Televisa experimented with new formats and shorter productions; by 2018, it produced *Por Amar Sin Ley*, which is the beginning of the production of telenovelas with two seasons. The first season had 95 episodes, and was broadcast that same year. The second season continued with the unresolved stories of the first one, and had 91 episodes, broadcast in 2019. The melodrama, starring Ana Brenda Contreras and David Zepeda, is about the lives of the lawyers who work at the Vega y Asociados law firm, where cases on domestic violence, gender, among others issues are resolved. It appeared that this fiction would have a third season, but it is not yet known if it will be done.

Another Televisa production, also with the series format, is *Sin Miedo a la Verdad*, whose protagonist, Manu (Álex Pérea) is a cyber hero who protects all those who have been victims of some injustice. The series had three seasons; the first one with 21 episodes; the second one with 25, and the third and last one with 35. It started broadcasting in 2018 and finished in 2020.

In the same vein, the series format, we find *Médicos, Línea de Vida*, which is the Mexican version of the successful American series *Grey's Anatomy*. Broadcast in 2019, starring the Cuban actress Livia Brito, it had 87 episodes, and it is about the lives of doctors and residents who work in a hospital in Mexico City. Televisa had announced a second season of this series, but to date it hasn't been confirmed.

Also in 2019, Televisa started the "Fábrica de Sueños" project, which objective is to produce their classic hits, but in short episodes. The first of these productions is the miniseries *La Usurpadora*, which had 25 chapters and was broadcast in prime time. The leading actress is Sandra Echeverría, and each chapter had an average duration of 43 minutes. This new version obtained 14,73 rating points. Also in that year, as part of this "Fábrica..." project, the new version of *Cuna de Lobos* was premiered, a telenovela that back when the original version broadcast averaged more than 50 points, while this new short version, starring the Spanish actress Paz Vega, obtained 13,16 rating points. As can be seen, Televisa took a risk with these remakes in a format with fewer episodes.

That same year, 2019, the series *Esta Historia Me Suena* premiered, which addressed family and youth issues, and each episode tells a different story. This show had four seasons, and was broadcast on El Canal de las Estrellas from 2019 to 2021.

The main feature of this series is that it presents a musical anthology, it was broadcast in the evening time slot and obtained a rating of 13,14 points.

In 2020, the trilogy of telenovelas called “Vencer” began broadcasting: *Vencer el Miedo*, *Vencer el Desamor* and *Vencer el Pasado*. These telenovelas were produced by Rosy Ocampo, and the focus topic is violence against women. In *Vencer el Miedo*, the leading actress is Paulina Goto; the telenovela had 46 episodes, lasting 41-44 minutes each. A characteristic of this fiction is an introductory voice at the beginning of the story, as well as the use of flashbacks, where the stories of each one of the four protagonists are developed. At the end of that same year, the second fiction was released: *Vencer el Desamor*, starring Daniela Romo. In this telenovela, the protagonist of *Vencer el Miedo* is the one who introduces the story of the four women of *Vencer el Desamor*, and there are also scenes with flashbacks as well as flashforwards, which is a characteristic of all telenovelas. 93 episodes were produced, more than twice as long as *Vencer el Miedo*, lasting 41-44 minutes each.

One characteristic of these telenovelas is that some characters reappear in the second and third productions, so there is continuity in some of the stories and even the spaces where it takes place, for example, in *Vencer el Pasado*, which is related to the house where the story of *Vencer el Desamor* was developed. The third production of this trilogy is *Vencer el Pasado*, also with four leading women who suffer, in this case, from digital violence. Starring the French actress Angelique Boyer, it had 85 episodes and premiered in 2021. Like the other telenovelas, it also shows flashbacks and flashforwards.

The peculiarity of this trilogy is that at the end of each episode an actor from the telenovela appears talking to the audience and encouraging them to report any type of violence they have suffered; also, psychological support is offered through an organization that provides free service by telephone. *Vencer el Pasado*, as we reported in this year's yearbook, had an audience of 16,94 points, ranking second in the Top Ten of 2021.

After this brief description of some of the formats and narratives, we can conclude that, mainly, Televisa has been investing in short formats for some years now, seeking to reach more audiences, but also for budget reasons. Unlike a few decades ago when telenovelas could have up to 180 or more episodes, today there is some influence of the current media ecosystem, such as VoD, to produce content on other more topical issues, as well as on shorter formats, like series, with one, two, or even more seasons. We believe that Televisa is playing with different formats (some short, and others with an average of 120 episodes) to get to different audiences, and perhaps not investing as many resources. We cannot deny that as audiences we are also in a process of transformation, and given the enormous amount of fiction and other genres on offer, we no longer want to spend months and months in front of the screen, as in the old days, waiting for one story to end,

but now, in the face of the discursive and aesthetic proposals of the VOD platforms, which allow us to watch the fictions we like at the time we want, and with few episodes; the television stations, in this case mainly Televisa, have also decided to produce in the format of shorter series and presenting some of the fictions divided in seasons, to give continuity to the stories.

To sum up

The scenarios are changing and we are faced with new players, mergers, formats and narratives. Televisión Azteca has preferred to produce reality shows and has left telenovelas and series aside, to concentrate on contest shows that pay off better. For its part, Imagen TV continues to import fiction and producing telenovelas does not seem to be on its plans. While, on public television, non fiction shows (series or telenovelas) were produced for 2021. As for the streaming companies, they continue to grow and to gain audiences, although they face new challenges. How will Netflix reactivate its market in the face of competition with platforms such as HBO Max or Disney +?

On the other hand, we must keep an eye on how the Mexican market moves, given the merger of Televisa-Univision.

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