

# MEXICO: TELEVISIUNIVISION AND THE INTERNATIONALIZATION OF TELEVISION FICTION PRODUCTION; BETWEEN GIANTS AND INDEPENDENT AGENCIES

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## **Introduction**

Following three years of global changes and restrictions brought about by the COVID-19 pandemic, life has returned to normal. Nevertheless, there have been notable alterations in audiovisual consumption practices compared to the pre-pandemic era. In the context of Mexico, the implementation of televised school classes had potential for a greater success. However, the pandemic forced thousands to millions of individuals from low-income backgrounds to acquire internet services and even engage in streaming for virtual courses. This accelerated the learning process and necessitated the use of mobile platforms and devices.

In 2022, the Soccer World Cup took place in Qatar, drawing the attention of viewers worldwide. Audiences opted to watch the matches on television via open television and streaming platforms that provided live game broadcasts. Specifically, Televisa, a prominent company, secured exclusive rights to transmit World Cup matches on the internet. Its newly established Vix platform exclusively aired 30 matches, while eight games were broadcast on Vix+. The remaining matches were accessible through open TV and satellite services like SKY. However, a few weeks after the conclusion of the World Cup, Televisa faced legal action from investors, including Palm Tran Inc., Amalgamated Transit Union, Local 1577, Pension Plan of Atlanta, among others. The investors accused Televisa of engaging in corrupt practices, alleging that the influential Mexican company had bribed FIFA to obtain exclusive rights for four World Cups (2018, 2022, 2026, 2030). To resolve the lawsuit, Televisa agreed to pay a settlement amount of 95 million dollars.

The recently formed conglomerate of TelevisaUnivision, comprised of familiar entities, has emerged as a significant transnational powerhouse in the realms of open television and competition with Subscription Video on Demand (SVOD) services in Mexico. By integrating the content from both dominant television corporations in

the Americas, they aim to cater to the Latin American market as well as the Hispanic market in the United States.

Meanwhile, the political landscape in Mexico is undergoing a growing polarization. With federal and state elections scheduled for 2024, it is anticipated that media coverage will heavily focus on the electoral process. Moreover, attacks by certain candidates, particularly those belonging to opposition parties against Morena, the ruling party led by Andrés Manuel López Obrador (AMLO), are expected to take center stage. AMLO himself has persisted in targeting media outlets and journalists unaffiliated with his government, often divulging private information about them. This was evident in a recent incident during one of his “mañanera” sessions, where AMLO disclosed the income of Loret de Mola, with whom he has been engaged in a prolonged media feud characterized by mutual attacks and attempts to discredit one another.

A significant issue in Mexico pertains to forced disappearances, with over 109,000 reported cases. Another pressing concern is gender violence and femicides. Tragically, ten women are killed every day in Mexico, yet the federal government dismisses various feminist movements, and acts of violence and femicide are not adequately addressed, much less resolved. Furthermore, violence against journalists in the country continues to escalate. In 2022 alone, 17 journalists were brutally murdered in Mexico, making it one of the most perilous places worldwide to practice journalism.

## **1. The Audiovisual Context of Mexico in 2022**

### **1.1. Open television in Mexico<sup>1</sup>**

A new concession for a fourth open television channel has yet to be launched. Cadena Tres, the concessionaire of Imagen TV, became the third private channel with national projection in 2015; however, according to information from the Federal Institute of Telecommunications (IFT), the chain only has a reach in the national territory of 71.67%. At the end of 2022, Imagen TV obtained an extension of 24 months to achieve nationwide coverage since the concession granted to this obliges it.

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<sup>1</sup> Graphs 1 *Rating and Share by station* and 2 *Genres and hours transmitted in TV programming* are not presented this year in this chapter because the necessary information for their preparation was not obtained.

**Chart 1. National open television networks/channels in Mexico**

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

Source: Obitel México.

### 1.2. Pay TV and VoD platforms in Mexico in 2022

In the last yearbook, we mentioned that pay TV is decreasing in terms of the number of subscribers. The strong presence of streaming platforms significantly affects companies that offer pay-tv services. Some data indicates that this has reduced its participation in the Mexican market by ten percent, from 45 to 35%.

Information provided by the Federal Institute of Telecommunications (IFT) indicates that the consumption of paid television channels remains at 23%. Disney Channel, Discovery Channel, De Película, and TNT, are the most watched channels. This information was obtained according to a National Survey of Consumption of Audiovisual Content carried out in 2022, and those surveyed indicated the following among the reasons for contracting pay television: “to have more options for content and channels” (28%); “for distance classes” (26%); and “being able to contract other services such as telephone or internet with the same provider” (20%). Among the reasons for not contracting this service, 49% of the people surveyed mentioned that it is because of the price, and 31% that they watch little television. The channel “De Película” also stands out in the report, where Mexican films from the golden age are broadcast.

The data available when writing this chapter on the rating of pay TV channels are those provided by Statista in 2021, presented in the 2022 yearbook, so we reproduce them in Table 2. Together with the two sources mentioned, we observe that the preferred channels of Mexicans who access pay TV are those that broadcast movies, sports, and children’s programming.

**Chart 2. Pay TV Channels in Mexico**

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

Source: Statista (2022)<sup>2</sup>.

At the end of the second quarter of 2022, in the country, according to the streaming market report from the consultancy *The Competitive Intelligence Unit* (CIU), Netflix continues to dominate the market with a 61.1% share; followed by Disney +, with 12.8%, still very distant but above the other two competitors such as HBO Max, with 10.3% and Amazon Prime with 7.6% of the market. Thus, Netflix still dominates the market with more than four times the share of Disney, its closest competitor.

The leading SVoD platforms in Mexico are Blim (now Vix and Vix+, Mexican); Casa Canibal (Cannibal Cinema, Mexican); Movistar+ (Telefonica); Star+ (Walt Disney Company); HBO Max (Warner Bros. Discovery); Apple TV (Apple Inc.); Netflix; Cinépolis Klic (Ramírez Organization, Mexican); Disney+; Claro-Video (América Móvil, Mexican); DAZN (Perform Group); Pluto TV (Paramount Global); Prime Video; Paramount+; Acorn-TV (AMC Networks); Curiosity Stream (Amazon Prime); Crunchyroll (Sony Group Corporation); Filminlatino (IMCINE, Mexican); FoxPremium; Tubi (Fox Corporation); Mubi; cinema platform; Fox Play; YouTube.

The vast majority come from the capital of US companies. However, some national companies such as Claro-Video also stand out; while offering catalogs with independent film content, Casa Canibal and Filminlatino stand out, the latter dedicated mainly to providing content on Mexican cinema, administered by the Min-

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

istry of Culture and the Mexican Institute of Cinematography (IMCINE). Likewise, Plataformacine also presents Mexican films on demand since it does not require a subscription; instead, the user pays for the content they see. In addition, the platform offers movies for free consumption.

### **1.3. Sources of financing for the audiovisual sector**

2022 was a year of financial recovery for Televisa after three years of suffering the effects of the COVID-19 pandemic. Reports indicate a 493% increase in net benefits, with a profit of 43.628.8 million pesos (about 2.181.44 million dollars), after the merger with Univision and its presence in other businesses. Profits come from its various companies, including movie distribution.

In the fourth quarter of 2022, concerning TelevisaUnivision, had an increase in advertising by 10% and 47% in subscriptions and licenses. While for the second most important private television station, TV Azteca, the year 2022 was not good at all: there was a collapse because, due to the drop in advertising, the net profit of the television station in the third quarter fell by 96% since it only earned 4 million, compared to the 102 million it had obtained in 2021. Therefore, television stations need help regarding advertisers, given the diversity of ways products can now be advertised.

On the other hand, we are increasingly seeing the product placement strategy in television fiction. While streaming, Vix offers free content but with ads. Netflix also provides a cheaper basic package but with commercials, so the audiovisual industry looks for models to make a profit. However, it is increasingly diversifying into other more affordable channels and platforms that are also powerful in reaching the consumer.

An essential source of income for television stations is what they receive from official advertising. The two television stations that have received the most money for this concept from the government of Andrés Manuel López Obrador are Televisa (933 million pesos / 51.8 million dollars) and Televisión Azteca (848 million / 47 million dollars).

### **1.4. Communication policies**

With its entry into the mobile market, the Federal Electricity Commission (CFE) ventures into telecommunications and the internet, offering prepaid plans starting at 30 pesos (1.5 USD), 40 GB of the internet, and 250 minutes of calls. With this, there will be access to the internet throughout the national territory, especially to those sites that were disconnected. The AMLO government will install 5.000 antennas to expand network coverage for all of ALTÁN, which is why the Altán + CFE alliance seeks to guarantee internet for all, especially the most remote towns, usually rural ones; This initiative aims to reduce the digital divide. The country experienced

an increase in internet use in the context of the pandemic, from 69.6% in 2017 to 75.6% in 2021 (INEGI, 2022). However, the digital divide is perceived between urban households (74.2%) and rural households (40.3%), a very considerable percentage in terms of access<sup>3</sup>.

### 1.5. Digital and mobile connectivity infrastructure

In Mexico, by 2022, there was a notable increase of 16 million internet users. From 82.8 million in 2021, it went to 98.6 million (Statista, 2023)<sup>4</sup>; this is a considerable increase. However, there are still almost 30 million people who still need access. With the arrival of CFE in the telecommunications field, this gap is expected to be reduced. Men are the ones who connect the most (51.8%) while women a little less (48.23%). Users connect through smartphones (95%) and computers (42%), while digital television is gaining more space (23%) for connection every day. The hours in which they connect the most are in the afternoon-night. 83% percent of users maintain an active account on Facebook, but Tik Tok is gaining more users daily, especially in the youth sector (Infobae, 2023)<sup>5</sup>.

<sup>3</sup> See information at <https://www.evaluare.mx/2023/01/28/brecha-digital-politicas-publicas-y-acceso-a-internet-en-mexico-como-vamos/>

<sup>4</sup><https://es.statista.com/estadisticas/1171866/usuarios-de-internet-mexico/#:~:text=En%202022%2C%20se%20estim%C3%B3%20que,de%20usuarios%20registrados%20en%202021>

<sup>5</sup> <https://www.infobae.com/educacion/2023/03/29/como-son-los-habitos-de-los-mexicanos-en-internet/>

## 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)**

<p><b>National premiere titles: 30</b></p> <p><b>Televisa: 25 national titles</b></p> <ol style="list-style-type: none"> <li>1. <i>Amor Dividido</i> (telenovela)</li> <li>2. <i>Los Ricos también Lloran</i> (telenovela)</li> <li>3. <i>El Último Rey. El Hijo del Pueblo</i> (series)</li> <li>4. <i>Corazón Guerrero</i> (telenovela)</li> <li>5. <i>La Herencia</i> (telenovela)</li> <li>6. <i>Mujer de Nadie</i> (telenovela)</li> <li>7. <i>Vencer la Ausencia</i> (telenovela)</li> <li>8. <i>La Mujer del Diablo</i> (series)</li> <li>9. <i>La Madrastra</i> (telenovela)</li> <li>10. <i>Mi Secreto</i> (telenovela)</li> <li>11. <i>Cabo</i> (telenovela)</li> <li>12. <i>Mi Camino es Amarte</i> (telenovela)</li> <li>13. 15. <i>Como Dice el Dicho</i> (unitary)</li> <li>14. <i>Esta Historia me Suena</i> (unitary)</li> <li>15. <i>La Rosa de Guadalupe</i> (unitary)</li> <li>16. <i>Corona de Lágrimas</i> (telenovela)</li> <li>17. <i>Una Familia de Diez</i> (sitcom)</li> <li>18. <i>Vecinos</i> (sitcom)</li> <li>19. <i>40 y 20</i> (sitcom)</li> <li>20. <i>Tal Para Cual</i> (sitcom)</li> <li>21. <i>Relatos Mascabrothers</i> (sitcom)</li> <li>22. <i>Renta Congelada</i> (sitcom)</li> <li>23. <i>Perdiendo el Juicio</i> (sitcom)</li> <li>24. <i>¿Tú Crees?</i> (sitcom)</li> <li>25. <i>Albertano Contra los Mostros</i> (sitcom)</li> </ol> <p><b>TV Azteca: 5 national titles</b></p> <ol style="list-style-type: none"> <li>26. <i>Un Día para Vivir</i> (series)</li> <li>27. <i>Lotería del Crimen</i> (series)</li> <li>28. <i>Rutas de la vida</i> (series).</li> <li>29. <i>Lo que la Gente Cuenta 8</i> (series)</li> <li>30. <i>Supertitián</i> (sitcom)</li> </ol> <p><b>Imagen TV: 0 national titles</b></p> <p><b>Canal Once: 0 national titles</b></p> <p><b>Canal 22: 0 national titles</b></p> <p><b>COPRODUCTIONS – 0</b></p> <p><b>TOTAL PREMIERE NATIONAL TITLES: 30</b></p>	<p><b>Foreign premiere titles OBITEL: 4</b></p> <p><b>Televisa: 1 imported title</b></p> <ol style="list-style-type: none"> <li>31. <i>La Biblia</i> (miniserie/USA).</li> </ol> <p><b>TV Azteca: 1 imported title</b></p> <ol style="list-style-type: none"> <li>32. <i>Enfermeras</i> (telenovela/Colombia)</li> </ol> <p><b>Imagen TV: 2 imported titles</b></p> <ol style="list-style-type: none"> <li>33. <i>Verdades Secretas</i> (telenovela/Brasil)</li> <li>34. <i>Génesis. El origen de todo</i> (series Brasil).</li> </ol> <p><b>Non OBITEL Foreign titles: 5</b></p> <p><b>Imagen TV: 4 imported titles</b></p> <ol style="list-style-type: none"> <li>35. <i>Kuzgun</i> (telenovela /Turkey)</li> <li>36. <i>Esposa Joven</i> (telenovela/Turkey)</li> <li>37. <i>Pecado original</i> (Turkey)</li> <li>38. <i>Madre</i> (Telenovela-Turkey)</li> </ol> <p><b>Canal 22: 1 imported title</b></p> <ol style="list-style-type: none"> <li>39. <i>Iván el Terrible</i> (series/ Russia).</li> </ol> <p><b>Reruns national titles: 10</b></p> <p><b>Televisa</b></p> <ol style="list-style-type: none"> <li>40. <i>Marimar</i> (telenovela)</li> <li>41. <i>María la del Barrio</i> (telenovela)</li> <li>42. <i>Lo que la vida me Robó</i> (telenovela)</li> <li>43. <i>Alborada</i> (telenovela)</li> <li>44. <i>Silvia Pinal frente a ti</i> (series)</li> <li>45. <i>Mujer casos de la vida real</i> (unitary).</li> <li>46. <i>Abismo de Pasión</i> (telenovela)</li> </ol> <p><b>TV Azteca: 1 title</b></p> <ol style="list-style-type: none"> <li>47. <i>Mirada de Mujer, el Regreso</i> (telenovela)</li> </ol> <p><b>Canal Once: 2 titles</b></p> <ol style="list-style-type: none"> <li>48. <i>Soy tu Fan</i> (series)</li> <li>49. <i>Anne with and E</i> (series)</li> </ol> <p><b>TOTAL OBITEL PREMIERE TITLES: 4</b></p>
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Source: Obitel México.

In 2022, 30 unpublished national titles were released, which means increased productions compared to 2021, where 16 were made. This increase is also because we include sitcoms in this table. There was an increase in fiction, without counting sitcoms, 20 shows were produced between series and telenovelas. The production in the sitcom format by Televisa stands out. The return of the project *La Fábrica de Sueños* is worth mentioning, with shows such as *Los Ricos También Lloran*.

On Televisión Azteca's part, the series production stands out, which is a format in which they are investing more, while the production of telenovelas has been on pause since 2016.

**Table 2. National premiere fiction in 2022 and its evolution in the five-year period**

Format	Titles					TOTAL	Hours					TOTAL
	2018	2019	2020	2021	2022		2018	2019	2020	2021	2022	
<b>Telenovela</b>	10	14	5	12	11	52	985:00	750:00	426:00	775:00	695:00	3631:00
<b>Series</b>	14	9	5	1	6	35	455:00	298:50	249:20	50:00	253:00	1305:70
<b>Miniseries</b>	0	0	0	0	0	0	0:00	0:00	0:00	0:00	0:00	0:00
<b>Telefilm</b>	0	0	0	0	0	0	0:00	0:00	0:00	0:00	0:00	0:00
<b>Unitary</b>	4	2	3	3	3	15	367:00	167:00	231:00	324:00	313:00	1402:00
<b>Docudrama</b>	0	0	0	0	0	0	0:00	0:00	0:00	0:00	0:00	0:00
<b>Others</b>	0	0	0	0	10	10	0:00	0:00	0:00	0:00	71:50	71:50 <sup>6</sup>

Fuente: Obitel Mexico

<sup>6</sup>In previous years, sitcoms were not counted, so this figure only corresponds to the year 2022.

**Table 3. Premiere Fiction broadcast in 2022: countries of origin**

Country	Tittles	%	Hours	%
<b>NATIONAL (total)</b>	<b>30</b>	<b>88</b>	<b>1332:50</b>	<b>83</b>
<b>OBITEL COUNTRIES (total)</b>	<b>4</b>	<b>12</b>	<b>281:50</b>	<b>17</b>
Argentina	0	0	0:00	0
Brazil	2	6	202:00	72
Chile	0	0	00:00	0
Colombia	1	3	72:50	26
Ecuador	0	0	0:00	0
Spain	0	0	0:00	0
USA Hispanic	1	3	7:00	2
<b>Mexico</b>	<b>30</b>	<b>0</b>	<b>1332:50</b>	<b>83</b>
Peru	0	0	0:00	0
Portugal	0	0	0:00	0
Uruguay	0	0	0:00	0
Venezuela	0	0	0:00	0
<b>COPRODUCTIONS (Totals)</b>	<b>0</b>	<b>0</b>	<b>0:00</b>	<b>0</b>
<b>National Coproductions</b>	<b>0</b>	<b>0</b>	<b>0:00</b>	<b>0</b>
<b>Obitel Countries Coproductions</b>	<b>0</b>	<b>0</b>	<b>0:00</b>	<b>0</b>
<b>TOTAL</b>	<b>34</b>	<b>100</b>	<b>1614:00</b>	<b>100</b>

Source: Obitel México.

In 2022, the national production stood out with 30 titles, while of countries belonging to Obitel, only five products were released (two from Colombia, one from the United States (Hispanic), and another from Brazil). Imagen TV continues importing products; last year from countries belonging to Obitel, there were two from Brazil, *Verdades Secretas* and *Génesis, the origin of everything*.

**Table 4. National and Iberoamerican fiction formats broadcast in 2022**

Format	Titles				Hours			
	National	%	Obitel area	%	National	%	Obitel area	%
<b>Telenovela</b>	10	33,3	2	50	695:00	52,1	117:50	42
<b>Serie</b>	6	20	1	25	253:00	19	156:50	55
<b>Miniseries</b>	0	0	1	25	0:00	0	7:50	3
<b>Sitcom</b>	10	33,3	0	0	71:50	5,4	0:00	0
<b>Unitary</b>	4	13,4	0	0	313:00	23,5	0:00	0
<b>Docudrama</b>	0	0	0	0	0:00	0	0:00	0
<b>Others</b>	0	0	0	0	0:00	0	0:00	0
<b>Total</b>	<b>30</b>	<b>100</b>	<b>4</b>	<b>100</b>	<b>1332:50</b>	<b>100</b>	<b>281:50</b>	<b>100</b>

Source: Prepared by OBITEL with national data supplied by Nielsen Ibope México, S.A. de C.V. Software MSS TV, Base "Rating regular 5 domains +Dish. Total television programming during 2022.

Telenovelas and sitcoms are national productions that stand out in several shows. While in terms of production hours, single programs (such as *La Rosa de Guadalupe* and *Como Dice el Dicho*), as well as telenovelas, are the formats with the highest number of episodes and hours made. Telenovelas are the format that continues to be the king in terms of Televisa's preference for its production and international distribution. As we will see in Table 5, it is the format that ranked first in terms of audience preference.

**Table 5. Ten most watched titles in 2022**

	Title	Channel	Produce by	Format/ genre	Number of episodes in 2022	Time-slot	Rating	Share
1	<i>Los Ricos También Lloran</i>	Las Estrellas	Televisa	Telenovela/ Drama	60	Prime Time	16,67	25,16
2	<i>La Rosa de Guadalupe</i>	Las Estrellas	Televisa	Unitary/ Drama	156	Afternoon	16,27	24,71
3	<i>El último rey. El Hijo del Pueblo (1)</i>	Las Estrellas	Televisa	Bioseries/ Drama	10	Prime Time	15,27	23,35
4	<i>La Madrastra T2</i>	Las Estrellas	Televisa	Telenovela/ Drama	50	Prime Time	14,76	23,53
5	<i>La Herencia</i>	Las Estrellas	Televisa	Telenovela/ Drama	80	Prime Time	14,18	21,90
6	<i>Mi Camino es Amarte</i>	Las Estrellas	Televisa	Telenovela / Drama	83	Prime Time	13,8	21
7	<i>Vencer la Ausencia</i>	Las Estrellas	Televisa	Telenovela/ Drama	80	Prime Time	13,75	21,64
8	<i>Cabo</i>	Las Estrellas	Televisa	Telenovela/ Drama	85	Prime Time	12,82	20,63
9	<i>Amor Dividido</i>	Las Estrellas	Televisa	Telenovela/ Drama	107	Afternoon	12,76	20,76
10	<i>Mujer de Nadie</i>	Las Estrellas	Televisa	Telenovela/ Drama	45	Prime Time	12,53	19,82
<b>Total of national productions: 6</b>				<b>Foreign original scripts: 4</b>				
<b>60%</b>				<b>40%</b>				

Source: Prepared by OBITEL with national data supplied by Nielsen Ibope México, S.A. de C.V. Software MSS TV, Base “Rating regular 5 domains +Dish. Total television programming during 2022”. (\*):  
In the case of *Mi Camino es Amarte* and *Cabo*, its broadcasts began in 2022 and ended in 2023.

Televisa’s fiction productions continue to dominate the Top Ten. It stands out that *Los Ricos también Lloran*, tops the list and is part of the “La Fábrica de Sueños” project. It is also important to point out that *La Rosa de Guadalupe* remains in the audience’s preferences, recovering the top positions—eight of the ten top aired in primetime. The unauthorized bioseries of the singer Vicente Fernández occupy the third place. By 2022, most Mexican scripts stand out, unlike other years where foreigners have prevailed.

**Table 6. Profile of the audience of the 10 titles most watched:  
gender, age, socio-economic status**

Title		Channel	Gender %		Socio-economic status%			
			Women	Men	ABC+	C	D+	DE
1	<i>Los Ricos También Lloran</i>	Las Estrellas	9,82	5,75	10,98	14,82	17,68	26,52
2	<i>La Rosa de Guadalupe</i>	Las Estrellas	9,38	5,49	8,49	14,45	17,63	26,99
3	<i>El Último Rey: el Hijo del Pueblo</i>	Las Estrellas	7,6	5,74	9,25	12,48	17,04	22,18
4	<i>La Madrastra</i>	Las Estrellas	8,54	4,47	8,77	11,33	16,81	22,83
5	<i>La Herencia</i>	Las Estrellas	8,34	4,59	7,98	12,8	15,78	23,23
6	<i>Mi Camino es Amarte</i>	Las Estrellas	8,25	4,6	7,81	11,25	16,08	23,34
7	<i>Vencer la Ausencia</i>	Las Estrellas	8,54	4,29	7,64	12,43	15,3	24,07
8	<i>Cabo</i>	Las Estrellas	7,94	4,79	8,78	10,01	14,58	22,13
9	<i>Amor Dividido</i>	Las Estrellas	7,36	4,2	7,11	11,67	13,6	22,79
10	<i>Mujer de Nadie</i>	Las Estrellas	7,32	4,23	8,11	11,64	13,57	20,53
Titles		Age group %						
		04-12	13-18	19-29	30-44	45+	-	-
1	<i>Los Ricos también Lloran</i>	8,04	7,46	5,64	7,42	10,82	-	-
2	<i>La Rosa de Guadalupe</i>	7,11	6,9	5,92	6,76	10,3	-	-
3	<i>El Último Rey: el Hijo del Pueblo</i>	5,89	6,11	3,77	6,7	9,76	-	-
4	<i>La Madrastra</i>	5,3	5,53	4,74	6,54	9,8	-	-
5	<i>La Herencia</i>	5,95	5,78	5,14	6,26	9,21	-	-
6	<i>Mi Camino es Amarte</i>	6,57	5,56	5,74	5,99	9,2	-	-
7	<i>Vencer la Ausencia</i>	5,61	5,61	5,79	5,95	9,24	-	-
8	<i>Cabo</i>	5,58	5,33	5,11	6,06	9,11	-	-
9	<i>Amor Dividido</i>	5,58	5,66	4,28	6,04	8,08	-	-
10	<i>Mujer de Nadie</i>	4,88	4,87	4,95	5,99	8,61	-	-

Source: Prepared by OBITEL with national data supplied by Nielsen Ibope México, S.A. de C.V. Software MSS TV, Base "Rating regular 5 domains +Dish. Total television programming during 2022".

It has been established as a pattern that those who consume fiction in Mexico are mainly women over 45 who belong to socioeconomic levels D+ and DE, that is, the lowest SES. In contrast, ABC is the socioeconomic group that consumes telenovelas the least. Among the youngest group, children and adolescents stand out, and those

who watch telenovelas the least are young people between the ages of 19 and 29 who consume other content on other platforms.

### 3. VoD Monitoring 2022

#### 3.1 VoD Platform market in 2022

In 2022, the growth of Video on Demand services continued, especially the subscription model, although with ups and downs. In Mexico and during the pandemic, the subscription to audiovisual content platforms experienced an acceleration of contracting until reaching an annual increase of 18.2% in 2020. In the first half 2022, this level was reduced to less than half to get 8.4%. However, by the end of 2022, VoD subscription accounting had a growth of 12.6 million, which implies that six out of ten internet users, or 56.2 million Mexicans, have access to audiovisual services and content of the platforms<sup>7</sup>. The streaming market in Mexico diversified and experienced greater competition between platforms such as Netflix, Amazon Prime Video, Disney+, HBO Max Latin America, Apple+, Paramount+, Vix+, Claro-Video, and Starz+, as the most significant, the same competition that has fostered a change in tariff strategy and supply model: a considerable reconfiguration (Piedras, 2022).

For example, the Netflix company, given the continuous loss of subscriptions, and the preference for other competitors such as Disney+ and HBO Max Latin America, has launched a new “basic plan with ads” at a reduced price of \$99 pesos per month (USD 5), and a limited catalog. According to the consultancy *The Competitive Intelligence Unit*, Netflix still maintains its prevalence with 61.1% of total subscriptions -a loss of 2.4 percentage points (pp) compared to the end of 2021. The increase was achieved by Disney+ (12.8% of subscriptions to SVOD), HBO Max (10.3%), and Amazon Prime Video (7.6%), which registered a subscription increase of 0.2, 1 and 0.5 percentage points (pp), respectively. These platforms have used affordable prices that range between \$70 and \$159 pesos per month (\$5 and 7 USD) that can be reduced with promotional rates and subscriptions to cable companies and electronic purchases such as Izzi or Mercado Libre; Likewise, these platforms have invested in original productions of Mexican series and telenovelas such as Disney+, HBO Max, Apple+ and Paramount+. Other platforms are defined by their low participation, such as Claro-Video (2.8% of total subscriptions to SVOD) and Blim TV (1.6%).

Concerning the earnings of companies that offer audiovisual content via subscription, the Mexican internet user spends around USD 48.58 per year for this service<sup>8</sup>, which estimates annual revenues of \$1.9 billion in 2022 and a prospect of 2.32 billion dollars per year by 2026, according to the consulting firm Statista.

<sup>7</sup> See information at <https://www.theciu.com/publicaciones-2/2022/10/17/mercado-de-contenidos-por-suscripcion-al-2t-2022-crecimiento-y-preferencia-de-plataformas>

<sup>8</sup> See information at <https://www.elfinanciero.com.mx/empresas/2022/05/18/streaming-deja-en-el-suelo-al-cine-tiene-ingresos-4-veces-mas-grandes/>

### 3.2. Local VoD platforms supply in 2022 (national, regional within the country)

The offer of VoD platforms in Mexico underwent several changes in 2022. The main difference was the creation of Vix+ (launched on March 31, 2022), a platform that combines Blim TV with Vix and Prende TV as part of the merger of Grupo Televisa with Univision Communications: a transnational conglomerate known as TelevisaUnivision, with headquarters in New York and Mexico City. The Vix+ platform offers two VoD service plans; the first is free with ads; its catalog consists of 40 thousand hours with more than 100 thematic channels. There is another premium plan with paid SVoD (USD 6.99 monthly) without advertising. In this service, ten thousand hours of content are added, additions to the original content consisting of telenovelas, television series, movies, news, and sports (live broadcasts of matches of the men's and women's Mexican Soccer League). Likewise, Vix+ broadcasts exclusively, live, and direct the World Cup by sublicensing the rights, representing a 20% increase in subscription and license revenues. The offer of original titles as a launch as "Vix+ Originals" of the paid plan was the series by *María Félix: La Doña* and *La Mujer del Diablo*. However, in 2022 Blim TV continued to offer 40 live television channels of different genres, only available in Mexico, due to compliance with contracts, licenses, and annual subscriptions entered into before the merger between *Grupo Televisa* and *Univision Communications*.

Claro-Video continues its free offer to subscribers who contract some telephone, cable, and internet service packages from its company. In addition to some original series productions, Claro-Video has added the Paramount+ catalog to its platform at no additional cost and established agreements with Google Play so that its App or application is available on Android TV.

The entry of platforms such as Vix, HBO Max, and Disney Plus led to intense competition in the streaming market, consolidation and exclusivity of content, and more entertainment at home. One of the consequences of the world of on-demand content was the displacement of Cinépolis Klic in 2022 and the announcement of its exit from the Mexican and Latin American market in May 2023, after ten years of its streaming launch and offering films, works theater, sporting events, and national and international concerts. The changes in the strategy and business model of Netflix, Prime Video, and Disney+ with free versions and advertisements made it impossible for the company Organización Ramírez, owner of the major movie exhibition chain, Cinépolis, to compete. The Cinépolis Klic platform offered films purchased for an average of \$300 pesos (USD 15), a higher price than the average for other platforms (Alfaro, 2023).

The offer of Dish México, a satellite TV company owned by MVS Comunicaciones, was modified in 2022. It continues with live series, movies, and special events on-demand programming. However, as of April 13, it withdrew the Fox Sports channels from its programming schedule due to a lack of an agreement with

Grupo Multimedia Lauman, a company that bought shares of Fox Sports Mexico<sup>9</sup>, to continue its broadcast. Instead, the Dish México offer added the sports channels of the NBA, NFL Network, and TVC Deportes, among others.

Likewise, FilminLatino, created in alliance with Filmin Spain, continues offering Mexican and international cinema. In 2022, the company Filmin España turned 15 and premiered its first original documentary film on its platform. FilminLatino continues showing movies released at national film festivals at the cost of USD 4 per month. Plataformacine and Casa Caníbal, which offer independent, festival, and cult cinema, are other platforms that continue with movie rental services without a subscription. Another platform that made its foray into Mexico is Mubi (formerly *The Auteurs*, a social network for moviegoers), a distribution, production, and streaming service company that offers a curated selection of films for a monthly subscription of 7.50 usd per month.

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

By 2022 we will see an increase in national premieres on streaming platforms compared to the previous year. In 2021 we point out that Netflix produced eight series, but in 2022 there are other platforms to produce Mexican series. The increase in productions from 2021 to 2022 has been considerable: from 12 to 25 original productions, 15 premieres, and the remaining ten are second or third-season series. That is, double the production or an increase of one hundred percent compared to the previous year. Prime Video has increased its output in Mexico. In 2021 it produced three series, a lower figure than in 2020, but increased with four in 2022. For its part, Vix+ premiered as another option platform with four productions.

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<sup>9</sup> See information at <https://www.elfinanciero.com.mx/empresas/2021/06/08/ift-aprueba-a-grupo-lauman-la-compra-de-fox-sports>

**Table 7. National fictions and co-productions displayed in 2022 in VoD systems**

<b>NATIONAL PREMIERE TITLES</b>	<b>CO-PRODUCTIONS</b>
<p><b>Netflix – 12 national titles</b></p> <ol style="list-style-type: none"> <li>1. <i>El Rey</i>, Vicente Fernández (Series)</li> <li>2. <i>Donde Hubo Fuego</i> (Telenovela)</li> <li>3. <i>La Flor más Bella</i> (Series)</li> <li>4. <i>Control Z</i> (Series)</li> <li>5. <i>Madre Solo Hay Dos</i> (Series)</li> <li>6. <i>¿Quién mató a Sara?</i> (Serie)</li> <li>7. <i>Rebelde</i> (Series)</li> <li>8. <i>Oscuro Deseo</i> (Series)</li> <li>9. <i>Belascoarán</i> (Series)</li> <li>10. <i>Dale Gas</i> (Series)</li> <li>11. <i>Guerra de Vecinos</i> (Series)</li> <li>12. <i>Club América vs Club América</i> (Mini-Series)</li> </ol> <p><b>Amazon Prime – 4 national titles</b></p> <ol style="list-style-type: none"> <li>13. <i>Un Extraño Enemigo</i> (Series)</li> <li>14. <i>Harina</i> (Series)</li> <li>15. <i>Mi Tío</i> (Series)</li> <li>16. <i>Cómo Sobrevivir Soltero</i> (Series)</li> </ol> <p><b>Disney Plus – 2 national titles</b></p> <ol style="list-style-type: none"> <li>17. <i>Los Hermanos Salvador</i> (Series)</li> <li>18. <i>Papás por Encargo</i> (Series)</li> </ol> <p><b>HBO Max – 3 national titles</b></p> <ol style="list-style-type: none"> <li>19. <i>Las Bravas</i> (Series)</li> <li>20. <i>Amsterdam</i> (Series)</li> <li>21. <i>Los Espookys</i> (Series)</li> </ol> <p><b>Claro-Video – 2 national titles</b></p> <ol style="list-style-type: none"> <li>22. <i>Código Implacable</i> (Series)</li> <li>23. <i>Reputación Dudosa</i> (Series)</li> </ol> <p><b>Vix + – 4 national titles</b></p> <ol style="list-style-type: none"> <li>24. <i>Mujeres Asesinas</i> (Series)</li> <li>25. <i>Travesuras de la Niña Mala</i> (Series)</li> <li>26. <i>40 y 20</i></li> <li>27. <i>María Felix, la Doña</i> (Series)</li> </ol> <p><b>Total: 27</b></p>	<p><b>Netflix – 2 titles</b></p> <ol style="list-style-type: none"> <li>1. <i>Élite</i> (5th season, series) – Spain.</li> <li>2. <i>Érase una vez... pero ya no'</i> (Serie) – Spain</li> </ol> <p><b>Total: 2</b></p>

Source: Obitel México.

### 3.4. Narrative features of VoD in 2022

In 2022 several SVoD companies set up their production and marketing offices in Mexico, with the objective, as in Netflix, of increasing original production aimed at both the Mexican and Latin American markets. The increase in productions from 2021 to 2022 has been considerable: from 12 to 25 original productions, 15 premieres, and the remaining ten are second or third-season series.

The series that renewed its second or third season stands out for its drama, suspense, and comedy, for example, *¿Quién Mató a Sara?* or *Oscuro Deseo*, which focus their narrative on crime or the police investigation of murders; or comedy like *Los Espookys* or *Madre Solo Hay Dos*, series that base their comic formula on misunderstandings and the situations that they trigger.

The most watched premiere production on platforms was *Donde Hubo Fuego*, a 39-episode telenovela produced by Argos Televisión for Netflix. This telenovela, of the suspense and crime genre, tells the story of a character who decides to travel to Mexico City and infiltrate a fire department to investigate the death of his journalist brother, who was trying to figure out the identity of a serial killer.

Other premiere series that stand out involve bioseries, a format that is serialized or fragmented into minifications about the life of a famous character or artist. This is the case of *El Rey, Vicente Fernández*, which addresses the life and artistic career of Vicente Fernández with a plot related to a success story for establishing himself as an icon of Mexican music. This Netflix production was less successful than *El Último Rey, El Hijo Del Pueblo*, another bioseries about the singer's life, produced by TelevisaUnivision and broadcast on open television from March to June 2022. The TelevisaUnivision production was based on a book unauthorized biographical, which addressed scandalous issues such as extramarital affairs and the kidnapping of his son.

The other bioseries was *María Félix, la Doña*, considered one of the best actresses in Mexican cinema and an icon of mass culture. A TelevisaUnivision production and broadcast on Vix+ as part of the twentieth anniversary of the actress' death. The series addresses the life of María Félix, from childhood to her adult life, portraying her figure in the way of female empowerment, ahead of her time, challenging gender stereotypes and the world of men.

Finally, regarding the productions of Disney+ and HBO Max in Mexico, stand-out comedy narratives such as *Papás por Encargo* and *Las Bravas FC* represent these companies' incursion and commitment to compete for the market with novel themes for Mexican audiences. The first series deals with a teenager who lives with her three adoptive parents (a family made up differently). One day, she decides to look for her mother, who mysteriously disappeared many years ago. For its part, *Las Bravas FC* tells the story of a retired soccer player who, forced by his precarious economic situation, trains the women's soccer team of a town in Mexico. In addition to

portraying what happens in sports from the female perspective, the series addresses issues such as insecurity, being overweight, and the relationship with parents from a youthful perspective.

#### 4. Fiction, interactivity and audience participation

For this section, we chose two exemplary cases that account for the different dissemination strategies of the platforms and thematic participation of the audiences: the series *Papás por Encargo* (Disney+) and *María Félix: La Doña* (Vix+), of which we mention a little in the previous section.

##### 4.1 *Papás por encargo*

*Papás por Encargo* is the second original production of Disney+ in Mexico, and it premiered on July 13, 2022, with ten episodes. BTF Media made it for Disney, a production company founded in Mexico in 2010 but now based in Miami; It maintained a production and distribution agreement with *Disney Media Distribution Latin America* and collaborated in the production of *Hasta que te conocí* (2016), a bioseries about the artist Juan Gabriel, and *El César* (2018), a bioseries about the Mexican boxer Julio Cesar Chavez. *Papás por Encargo* tells the story of California, a teenager who was taken in as a child by three young people who became her adoptive parents since her mother entrusted them to her indefinitely. The story unfolds when the mother contacts the daughter through a gift to look for her in a town outside of Mexico City. So, the three adoptive parents (who make up a pop band) and California set out on a road trip searching for the mysteriously missing mother. With a cast that had previously participated in Disney Channel Latin America productions such as Jorge Blanco (Argentine children's-youth telenovela *Violetta*, 2012-2015), Michael Ronda (Argentine children's-youth telenovela *Soy Luna*, 2016-2018), and the actor and singer Lalo Brito, who was part of La Nueva Banda Timbiriche.

The dissemination and promotion of *Papás por Encargo* had a double strategy. The first was to promote the series as a content innovator on social networks and media, particularly as a series that addresses the topic of integrated families diversely. An updated vision of an ordinary family, where the new generations can notice how homoparental homes and children growing up in diverse dwellings can be as natural as possible compared to other generations. In an interview with the *Milenio* newspaper, actress Fátima Molina, who plays California's mother, commented "This teaches us that there are different families and that we must stop judging, pointing out, we are simply different people; It is time to change optics" (Moreno, 2022).

The second promotional strategy was the songs included in each series episode. An approach similar to *Luis Miguel La Serie*, where the soundtrack was integrated into the narrative. The songs are reference points that are not only included in the

narrative as financial-marketing support but also transform the format (González, et al., 2020).



Source: <https://twitter.com/disneyplusla/status/1547974271820898310>

Disney+ posted music videos on platforms like YouTube and Facebook, with thousands of views and user comments. Likewise, the songs were promoted by Spotify on the premiere day. To date (April 2023), the song *Oye Mujer* is the most popular song on the album on the Spotify platform, with 652.803 views. On YouTube, it has 549.809 views.



Source: [https://www.youtube.com/watch?v=1sClT-hwYpY&ab\\_channel=DisneyMusicLAVEVO](https://www.youtube.com/watch?v=1sClT-hwYpY&ab_channel=DisneyMusicLAVEVO)

The *Papás por Encargo* audience showed their love for the songs in Twitter, Facebook, and YouTube comments sections.



Source: YouTube México.

However, the issue of California teenagers’ menstruation caused participation in social networks.



Source: <https://twitter.com/PxEUpdates/status/1547776518230720517>

In the comments, the users of these social networks point out the relevance of “breaking the menstruation taboo” and addressing it “openly” in the series. They also emphasized the historical sense of addressing this topic in the context of the production of audiovisual content in Mexico and that it serves the conversation with the family at home.



Source: YouTube México.

#### 4.2. *María Félix, La Doña*

This miniseries was launched as one of the original products on which the Vix+ streaming platform became known in July 2022 as part of the TelevisaUnivision merger. The eight-episode series narrates aspects of the life of actress María Félix, from her childhood to her mature age. The story was based on testimonials from people close to the actress and other reports, unlike other bioseries that have been based on unauthorized (or authorized) biographies, which have been great successes, such as that of singer Luis Miguel. *María Félix, La Doña*, stars Sandra Echeverría (mature María Félix); Ximena Romo (as a young man) and Abril Vergara (girl); as well as the actors Guillermo García Cantú, who personifies his father, among other actors. The strategy at Vix+ for this program was not to launch all its episodes in one broadcast but two episodes every week until completing eight.

The producer is Carmen Armendáriz, recognized for her work on television and in the cinema. She is the daughter of Pedro Armendáriz, an actor from the golden age of Mexican cinema. The miniseries' director is Máfer Suárez, who has directed several episodes of the series *Mujeres Asesinas*; An interesting detail is that the production consisted mainly of women. María Félix is considered a woman ahead of her time, who was never weak before men, and coincides with Televisa's recent strategy of broadcasting content based on empowering women. María Félix is a reference for many Mexican women, as an icon for her great physical beauty, but also for not being a submissive woman and always speaking openly and behaving in some way like a man. Even one of the episodes is titled "a woman with a Man's Heart".



Source: [https://www.instagram.com/tv/Cf430SSJLAG/?utm\\_source=ig\\_web\\_copy\\_link](https://www.instagram.com/tv/Cf430SSJLAG/?utm_source=ig_web_copy_link)

A few days after its premiere, Vix+ released a one-minute trailer through its YouTube channel, with some information about what the series would tell, such as the romances that María Félix had, how she ventured into acting, the bad relationship he had with his father, the crush on his brother who died prematurely, among other details of his life.

TelevisaUnivision promoted the series' launch through the media, but also using the Vix+ social networks such as Twitter.



Source: [https://www.instagram.com/tv/Cf7LRjVr\\_LY/](https://www.instagram.com/tv/Cf7LRjVr_LY/)

When consulting followers' comments on Vix + on his Twitter account, we found complaints about the advertisements the series contains on the platform, despite being a subscription that requires payment. And it is that Televisa has always handled many promotions in its programming, and as an audience, it is expected that by paying a fee, its consumption can be avoided. When writing this chapter, we checked if there was advertising in the content since they were subscribed, and there wasn't.

On the other hand, a strategy of TelevisaUnivision is that at the beginning of 2023, it decided to broadcast the series on open television (Canal de las Estrellas), two episodes per week. This may also be to promote the product and reach a larger audience. Referring to this, Parrot Analytics reports indicate that *María Félix, La Doña* has 1.6x the demand for television series in Mexico, and 64% of all programs in this market have this level of demand in the country, that is, is average. The series has not stood out in a nutshell. Another piece of information presented by this company is that the market of origin of the series is one hundred percent Mexican, two percent from the United States, two percent from Spain, and one percent Colombian, Chilean, and Argentine. Therefore, other markets would have to be analyzed to see the penetration of the series with which the Vix+ platform was launched into the world.<sup>10</sup>

It is interesting to observe how TelevisaUnivision operates by launching the series on the Vix and Vix+ platforms and later on Canal de las Estrellas. This reveals that all possible platforms are used to obtain benefits from the product, which distinguishes TelevisaUnivision from other platforms, such as Netflix and Claro-Video, which do not have open television channels.

## 5. Highlights of the year 2022

Among what stands out in 2022, as we mentioned, was the launch of the Vix+ streaming platform owned by TelevisaUnivision. In April 2021, a long merger process began between two large companies, Televisa (owner of the video-on-demand service, Blim TV) and Univision (owner of the Univision Now platform, Prende TV and Vix Latin America), which together will reach more than 100 million Spanish-speaking audiences every day. The merger had the approval of the regulatory authority in the United States, the FCC, and the financial support of Sotfbank and Google. With the launch of Vix+, 60% of viewers are covered in both Mexico and the United States (although it is planned to have access to 19 countries, including the Latin American region) with a broad unified catalog that includes content from other entertainment companies and of sports such as Lionsgate, Metro-Goldwyn-Mayer, TV Globo, The Walt Disney Company, NBC-Universal, among others. As part of this launch, one of the first successful original or Vix+ Original titles in the premium plan was the series *María Félix: La Doña* and *La Mujer del Diablo*<sup>11</sup>.

On the other hand, it highlights how Televisa and TV Azteca are investing in technology to position themselves better and produce content for different platforms. We have observed that the two television stations have opted to invest in state-of-the-art technology to make their diverse content with higher image and

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<sup>10</sup> <https://tv.parrotanalytics.com/MX/maria-felix-la-dona-vix-plus?hl=es>

<sup>11</sup> <https://www.forbes.com.mx/negocios-vix-plataforma-que-televisa-univision-competir-netflix/>

sound quality and create products that can be marketed on other platforms, which is why the two television stations are positioned as the two leading television content producers in Mexico.

One of the critical changes in TV Azteca in 2022 is the appointment of a new content director for the television station, Adrián Ortega, who announced that by 2023 the television station would once again produce telenovelas as one of its strategies to boost ratings. This announcement is important, given that since 2016 TV Azteca has stopped making them. This suggests that audiences and income from the production of reality shows have not been as good as expected. As reported in previous years, TV Azteca produced reality shows such as *Exatlón*, *Master Chef*, and *Survivor*. Data from Nielsen Ibope for 2022 shows that it has not been the products of the Ajusto television station that have obtained the biggest audience, but the reality shows produced by Televisa (*Who is the mask*, for example).

Likewise, fiction is therefore, an essential product for television stations but also streaming companies. Netflix Mexico's commitment to melodrama and the telenovela format stands out. *Donde Hubo Fuego* became the first streaming novel, the most viewed not only on Netflix in Mexico but worldwide, even though it did not have an advertising campaign. The production house of this telenovela was Argos Comunicación. This production company brought together accomplished actors of the telenovela that are broadcast on open television, such as Eduardo Capetillo and Itatí Cantoral, to tell a melodramatic story that brings together aspects of romance, passion, crime, and action. However, the pole of attraction, according to Álvaro Cueva, a television critic, had to do with the fact that a story of the fire department of Mexico City is told:

When you see those cases, those emergencies, those fires, your mouth will drop open. Still, when you see them on the largest, busiest, and most emblematic avenues in Mexico, in front of many buildings and monuments that are part of our collective imagination, you will experience an emotion never felt before. You won't believe it because something like this had never been done before, something this good had never been done, and it had never been done with the support and advice of our real-world superheroes: the firefighters of Mexico City (Cueva, 2022).

### 5.1 Turkish production in Mexico

Another aspect to highlight is the penetration and acceptance of Turkish products in the country. Since its inception, the television station Imagen Televisión has invested in buying successful Turkish telenovelas to broadcast in Mexico. Although the ratings do not reach those of Televisa with its telenovelas, we observe that more and more people watch products from Turkey. It may be, we believe, that the stories that are presented are more similar to the traditional Mexican telenovelas of the eighties, with a central love story, the nuclear family, etc. Mexican stories today

increasingly contain more violence, not only implicit but also explicit. In addition to Turkish products, companies from that country have established themselves in Mexico to produce reality shows, such as *Survivor*, *La Voz Kids*, *La Voz Senior*, and Acun Medya Global for TV Azteca.

## **6. Topic of the year 2022: Independent production companies in Mexico and the internationalization of television fiction production in Ibero-America**

Companies such as Netflix, Disney+, HBO Max, and Vix+ are established as global transmission platforms that structurally modify and alter the logic of production, distribution, exhibition, and consumption in each country (Gómez & Muñoz, 2022; Carboni & Rivero, 2022). In the case of Mexico, the country has emerged in recent years as a center or hub of Mexican and Latin American production (Piñón, 2014) thanks to the presence of these transnational companies of United States origin but also of production companies and agencies -and workers audiovisual sector - from other Latin American countries.

Thus, this section seeks to account for how independent production agencies in Mexico have increased, due in part to their alliances with global platform companies whose strategy of insertion and access to audiences in each country implies the operation and collaboration with production companies of Middle range; an internationalization strategy developed by Netflix in several countries (Lobato & Lotz, 2020). This does not imply that the platform companies continue to co-produce in alliance with national television channels in Mexico, such as Televisa and TV Azteca, or other companies or production companies that have consolidated their work, such as Argos Comunicación and Alazraki Entertainment.

The landscape of audiovisual production in Mexico was dominated for a long time by open television or two private companies, Televisa and TV Azteca, which concentrated the market and audience participation. Local and national public television channels have been marginal in this context, with low production and small audiences. Before the launch of Netflix in Mexico, the national audiovisual production carried out co-productions (mainly series) with pay television channels concentrated in the United States (such as TNT or the Japanese Sony) to compete with open television channels (Gómez, 2016).

Currently, these companies have a series of alliances with open television channels, pay television providers and independent audiovisual production companies. According to the Filming Commission of Mexico City, the report was carried out in alliance with the National Chamber of the Film Industry (CANACINE) and the Mexican Association of Filmmakers AC (ANFI); 2020, 2,422 production houses were registered, of which 199 remain active. The statistical report highlights that

57% (1,805) of the permits granted were to produce series, 13% (401) for TV, 8% (246) for Cinema, and 22% (702) for commercials. This represents an industry's economic income of close to 4.600 million Mexican pesos.<sup>12</sup>

Netflix was the foreign company that began co-productions with Mexican companies in 2015 with the launch of the *Club de Cuervos* series, commissioned to be produced in Spanish with Alazraki Entertainment, producer of publicist Carlos Alazraki and his family. In 2018, Netflix agreed with the independent producer and creator Manolo Caro to broadcast *La Casa de las Flores*. According to Gómez and Rivero (2022), these co-productions and collaborations gradually increased. In 2020 Netflix began an aggressive strategy in the Mexican market by investing 200 million dollars in local production and announcing another 300 million for 2021. A year earlier, Netflix had established its local office in Mexico City, with more than 100 employees, becoming a production center to operate in the Latin American market.

SVOD companies like Disney, Amazon, HBO, and Paramount have also established local offices in Mexico City. According to Gómez and Rivero (2022), there are four production models exhibited by Netflix in Mexico, an aspect that could well be extrapolated to the other platform companies. The first production model corresponds to the content produced by the independent production agency (as in the case of Manolo Caro, creator of *La Casa de las Flores*). The second production model refers to the commissions or commissions of the companies to independent production companies or third parties, where the same corporations finance the projects from the beginning and maintain exclusive transmission rights on their platforms (the case of Alazraki Entertainment). The third model corresponds to co-productions with a prominent broadcaster or television network whose content is broadcast on television nationally, regionally, and globally (the case of *Luis Miguel: La Serie*, a Netflix and Telemundo co-production). Moreover, finally, the fourth model related to the acquisition of successful titles, already released in the country, and collected exclusively for transmission by the platform (the case of *El Chapo*, made by Gaumont International, Univision, and Urgencias, and broadcast by Netflix, or the case of *Hasta que te Conocí, Juan Gabriel*, a series produced by *Somos*, distributed by Disney for TNT and Claro-Video in Mexico).

In this way, with the investment of large companies and the amount of audiovisual content in recent years made by these production centers, the projects and production models have also expanded and hybridized due to the significant incorporation of various independent production companies. This incorporation implies a kind of subcontracting of agencies. On the one hand, the “big players” in audiovisual production can still be identified. For example, in a descriptive review of the amount of production and alliances or partnerships (from 2015 to 2021), Televisa,

<sup>12</sup> See information at: <https://senalnews.com/es/contenidos/como-fue-la-produccion-de-cine-en-mexico-durante-2020>

W Studios, and Blim can be identified with 14 original productions in alliance with Studios Morena Films, Univision, Sony Pictures, Lemon Studios, and ResonantTV; and, secondly, to Sony Pictures with eight productions in collaboration with Claro Video–Imagen Television, TV Azteca, Amazon, and Dopamine.

The independent production companies that have become relevant are Argos Comunicación, Alazraki Entertainment, and Dynamo (an agency of Mexican and Colombian producers). Other independent production companies participate and collaborate with these agencies and the big platform companies such as Anima Studios, BTF Media, 1:11 Films & TV México, Corazón Films, Traziende Film, Resonant TV, Adicta Films, Jaibol Films, Morena Films, Perro Azul, and Dopamine, among those that participate the most in the market.

Argos Comunicación is an independent content production company with years of television production for TV Azteca, cinema, and SVoD. Founded in 1992, it has three owners. The best known is Epigmenio Ibarra, who is a businessman close to the current Mexican government, and who recently confirmed a loan for 150 million pesos (\$ USD 7.5 million) from the Banco Nacional de Comercio Exterior (Bancomext) to invest in the hiring of more employees, purchase of equipment and remodeling of the Churubusco film studios. Argos Comunicación has 52 telenovela productions for TV Azteca, Telemundo, Cadena Tres, Imagen Televisión, and Netflix, as well as 12 series productions for two platforms such as HBO, Netflix, and two television channels such as Telemundo and Cadena Tres.

For its part, the production company Alazraki Entertainment belongs to the Alazraki family. Carlos Alazraki is a television producer known for founding the agency Alazraki y Asociados Publicidad. His son, Gary Alazraki, is a filmmaker, co-creator, and producer of *Club de Cuervos* (2015), the first Netflix original series made on commission. Alazraki Entertainment, in addition to having three film productions, including the commercial success of *Nosotros Los Nobles* (2013), has produced the *Club de Cuervos* saga and its spin-off *La Balada de Hugo Sánchez* (2018) and the unique *Yo, Potro* (2018), both broadcast on Netflix. In 2020, Gary Alazraki produced the comedy series *Acapulco*, starring Eugenio Derbez, for Apple TV+. Moreover, in 2022, he launched a film on the HBO Max platform, *The Father of the Bride*, starring Andy García and Diego Boneta. The services it promotes as an independent producer include production, casting, locations, equipment, post-production, and creativity.

Another independent production company, but due to its presence in the audiovisual industry, is Dynamo Producciones, a Colombian production house with local offices in Mexico City, New York, and Madrid. Dynamo has more than 50 audiovisual productions. However, in Mexico, it stands out for two series produced for Netflix, *Historia de un Crimen: Colosio* (2020), about the murder of the candidate for the presidency of Mexico, Luis Donaldo Colosio, and *Historia de un Crimen: La*

*Búsqueda* (2020), the case of the disappearance of the girl Paulette Gebara. The two productions are part of the Netflix franchise Crime Story, which resembles the stories that take place in the United States and broadcast on the FX channel (owned by the Walt Disney Company) as *American Crime Story*, creator of the series *The People vs. OJ Simpson* (2016), and *The Assassination of Gianni Versace* (2018).

This brief description of the independent production companies leads us to conclude, on the one hand, how Mexico City has established itself as one of the most critical production centers globally, and on the other, the continuous capital investment of millions of dollars by the SVoD companies that integrate these independent production companies into their business models and commissions for series or fiction with a certain degree of diversity in terms of television formats.

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