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Netflix consumption in Mexico during the Covid-19 Pandemic

Consumo de Netflix en México durante la Pandemia de Covid-19

Abstract

Covid-19 generated new interactions and changes in the practices and habits of Netflix users in Mexico, establishing agencies that include innovative social and cultural relationships. In the line of this research, this article sought to identify these changes and transformations, as well as the "power circuits" developed by Netflix to produce, distribute and sell its audio-visual content. Based on the use and application of a descriptive quantitative methodology, indicators were obtained on the regular and daily consumption of Netflix in Mexico during the pandemic, after applying questionnaires to users of the platform. The study identified a robust integration of Netflix into the daily activities of cultural consumption, thereby consolidating its power, hegemony and predominance in the Mexican market. The findings highlight the increase in Netflix use during the Covid-19 pandemic, an increase in selectivity in content, greater shared access, an intensive use of the platform's recommendation mechanisms, the use of fandom as a database and the strengthening of corporate interests.

Keywords

Covid-19; Netflix; Mexico; consumption; agency; power

Resumen

La pandemia de Covid-19 ha generado nuevas interacciones y cambios en las prácticas y hábitos de los usuarios de Netflix en México, estableciendo agencias que incluyen novedosas relaciones sociales y culturales. En esta línea de investigación, la intención de este artículo es identificar estos cambios y transformaciones, así como los "circuitos de poder" desarrollados por Netflix para producir, distribuir y vender sus contenidos audiovisuales. A partir del uso y la aplicación de una metodología de corte cuantitativo descriptivo se obtuvieron indicadores sobre el consumo regular y cotidiano de Netflix en México durante la pandemia después de aplicar cuestionarios a usuarios de la plataforma. Las principales observaciones del estudio distinguen una sólida integración de Netflix a las actividades cotidianas de consumo cultural, que consolida su poder, hegemonía y predominio en el mercado mexicano. Los principales hallazgos destacan el incremento en el uso de Netflix durante la pandemia de Covid-19, un aumento selectividad en los contenidos, mayor acceso compartido, un uso intensivo de los mecanismos de recomendación de la plataforma, el uso del fandom como base datos y el afianzamiento de intereses corporativos.

Palabras clave

Covid-19; Netflix; México; consumo; agencia; poder

1. Introduction

The Covid-19 pandemic that initiated on 2019 and spanned all the way up to 2022, has generated an array of processes and transformations for media consumption from a series of factors that, to name one, include lockdown restrictions, which established a number of new habits for cultural consumption, among which stand out, for instance, the consolidation of audio-visual streaming platform services (Montaña, Ollé & Lavilla, 2020). In this regard, Netflix, Amazon, HBO Max, Disney +, Paramount +, to name a few, have experienced a sustained growth in the international markets that produced revenues going from 17 billion USD in 2016, to 67 billion USD in 2020, with a projection of 126 billion dollars by 2026 (Stoll, 2022).

From this context, the objective is to identify some of the characteristics present in the practices and consumption habits for Netflix, developed during the Covid-19 pandemic in Mexico. In this case, the hypothesis of this research proposes that, during this sanitary emergency, a series of consumption interactions were established that consolidated the power position of Netflix in the Mexican market. In this case, the main approach consists in pointing out that Netflix services consolidation during the Covid 19 pandemic generated and strengthened a series of "power circuits" that, in agreement with the latest contributions to the state-of-the-art by Hesmondhalgh & Lotz (2020), make reference to a series of mechanisms based on the control exercised on creators and audiences by media companies involved in the production and distribution; such mechanisms can be identified in three different levels: 1) interphase location; 2) recommendations, searches and other functions; 3) visualization metrics.

On the specific case of Netflix, in 2019 the subscriptions in Mexico to the streaming platform increased by a 40.5%, while in Brazil reached a 35.1%, being these two the Latin-American countries in which the platform has had a major impact, since the growth during the same period in other countries of the region was not as important, as the numbers from Argentina (7.2%), Colombia (5.9%) or Chile (4%) can attest (Navarro, 2021). By 2020, Netflix in Mexico became the audio-visual content streaming platform with the highest demand, above YouTube, Amazon Prime, Claro Video, HBO, Blim, Fox Premium, Apple TV, Disney+, among others (Navarro, 2022a).

From this reference data, it can be observed that the Mexican market represents one of the most important for Netflix by number of subscribers and revenue (Gómez & Muñoz, 2022). Therefore, the purpose of this piece is to identify: Which were the consumption characteristics for Netflix in Mexico during the Covid 19 pandemic? What kind of content was the preferred one during this period of time? Which were the most common forms to access the platform? What kind of foreign and Mexican contents were preferred by the users? Which are the forms of interaction for content recommendations? Which are the characteristics of phenomena such as *fandom*, regarding Netflix productions? Lastly, which are the main streaming platforms consumed in Mexico?

Now, the turning point in every aspect of the human life posed by the Covid 19 pandemic implies, for authors such as Vlassis (2021), a new paradigm in the development of the cultural industries, from its impact in the markets and the flow of digital content, which implies the consolidation of digital platforms and their production, distribution and consumption models. On this matter, the strengthening of streaming operators such as Netflix, increases the economic power concentration in companies that produce and distribute audio-visual content (Poell, 2020). It is important to highlight that this processes of "platformisation" not only have reorganised the production and distribution of audio-visuals, but also the cultural practices (Poell, Nieborg & van Dijck, 2019).

In this context, among other elements, are developed new "dimensions on experiences and use practices and in relation with the content of this platforms, by establishing different mechanisms on searching, navigation, scrolling and recommendation" (Lotz, Lobato & Thomas, 2018: 41). Therefore, new and diverse forms of commitment with the platforms themselves and the content are being generated (Turner, 2019). Now, thiese relations established between the users and the platforms acquire a bigger complexity when turned into an exercise of power, which are established from the data exchange stored by means of an algorithm, in order to identify further movements of "human behaviour" (Rouvroy, 2012: 1).

Therefore, a "behaviourist perspective on the data usage" is established, eroding the individual experience with the existence of an unequal interaction or feedback between user and platform, generated by a power form based on an algorithm that intends to predict consumption (Shapiro, 2020: 660). From this perspective, it is intended to reduce uncertainty in the selection of content, by establishing simplified indicators on preferences, attitudes and behaviours without deepening on motivations (Desrosières, 2012). The risk on this pragmatic and operational vision is the proposition of structuration processes that oppose and don't take into account a series of agencies conceived as the capacities of people to act and change decisions on any given moment (Giddens, 1986).

On this sense, the algorithm application is turning into a strategical element with an ubiquitous and unavoidable form for the consumer, having the possibility to alter strictly human cultural and decision making processes (Pajkovic, 2022). Hence, under the pretence of establishing a personalized service, streaming platforms intend to widen the taste and preferences of the users in order to keep them in the platform, what is in exchange turned into one of the main values of their business model, and that, in the end, has an impact in the consumption preferences and aesthetic experiences (Arielli, 2018).

In accordance to this, there are tensions developing amongst human agency and the algorithms related to recommendations and cultural consumption; this implies that, primarily, there are decisions on content that can be taken by the user, but without controlling the access channels, hence limiting the space for agency (Finn, 2017). In this case, the idea for the user to be able of watching a show or film at any moment and place is a fact, although it immediately implies an action that is observed and registered by the platform, transforming it on valuable information for technological companies, establishing in such way the conditions for a digital capitalism based and supported on technological systems (Murdock & Golding, 2016).

In this case, upon the expansion of a daily flux of connexion experiences, a two level fictitious corporate discourse is developed, in which, on one hand, it is proposed that the consumer has the possibility of making personal choices in the different digital services, which represents a characteristic essential in modern capitalism, and, on the other hand, it is exploited the idea of an egalitarian citizenship and social participation; this ideas therefore are, from critical perspectives such as that of political economy, questionable, since there are a series of interests and power relations upon consumer data, hence limiting the chances of equity, access and diversity (Murdock, 2021).

The weight of the data has implied transformations affecting the development of social life, businesses, politics and mainly the culture, by acquiring a fundamental economic value since they have turned into digital traces that reflect permanent patterns of interests, commitments and actions that can be used to identify tastes and preferences, with the intention of establishing certain interactions or recommendations on others, establishing new forms of agency in the digital platforms (Couldry, 2018).

However, it is important to point out that this exploitation on the consumption information of digital services has a commercial intention expressed through advertising and marketing strategies directed towards audio-visual platforms users. Hence, different business models are established, such as subscriptions, content payment, etcetera; but then, depending on the user's browsing history, certain content is suggested from the stored information on their behaviour, history and preferences on digital devices and networks. Deep inside, this inquiry processes to gather consumer information, are turned into "ubiquitous surveillance" practices, by means of their interactions with technologies that collect, store and classify information, establishing a series or power relations (Andrejevic, 2012: 92).

2. Methods

The fieldwork for this research was of the quantitative descriptive kind, using a non-experimental, trend longitudinal design, for which it was used a standardized, multiple choice survey, that functioned as data collection instrument (Gunter, 2014). The survey was applied via digital channels in two instances, before and after the Covid 19 pandemic period, being the first in November 2020 and the latter on August 2022. In the survey some of the main activities of Netflix users are described, in order to establish a comparative in two different periods of time, therefore producing a series of important variable tendencies in the field of digital environments consumption behaviour research (Jensen, 2014). The survey included a filtering question in order to obtain the informed consent of participants. Also, another filtering question asked them about legal age, after which the following categories where covered:

a) Demographic data, which included sex, age, residence country, level of studies, civil status, employment status and socioeconomic status, using the indicators from the AMAI coefficient (2018).

b) Regarding the access to Netflix, there were established characteristics on platform access, such as if the user had access to it previously or during the Covid 19 pandemic, places where it was used, spaces and devices where the content is reproduced.

c) Regarding use, there were added items on use frequency, content type and preferred genres, before and after the Covid 19 pandemic. In this case, a catalogue with 20 of the most reproduced movies and shows in the platform was proposed, Mexican as well as international, selected from the most popular new releases published by Netflix in their page.

d) In the section pertaining user interaction, a series of phenomena were observed, including recommendation mechanisms that can influence in the decision of watching a specific content, fan groups affiliation, transmedia content production and the use of other platforms competing with Netflix.

The estimated number of Netflix users in Mexico in 2020 was around six million active accounts (Navarro, 2022b). Faced with the difficulty of having a sampling frame to establish a probabilistic strategy, a net or snowball sampling method (Izcara, 2007) was used, initiating the survey application to different age cut-off groups. The first data collection, during November 2020, generated a sample of 418 participants, and the second, during August 2022, a total of 438. In spite of the limitations for the non-probabilistic strategy, this kind of data collection mechanisms represents an alternative for descriptive studies that establish social changes trends in the context of digital convergence (Rogers, 2013).

The samples correspond to 418 and 438 persons that participated in the study, from which 58% are women and 42% are men, with a mean age of 25 years, ranging from 18 to 67 years of age. Four out of ten indicated they had postgraduate studies and the same quantity indicated their maximum level of studies was undergraduate, with only two out of ten indicating high school, either finished or incomplete, as their maximum level of studies. Most of the participants indicated single as their civil status (52.8%) and in a lesser level married (39.6%). Employment status for more than half of the participants was full-time employee (35%) and student (32%), followed by part-time employee (15%) and self-employed (9.5%); other less represented conditions were unemployed (6.9%) and retiree or pensioner (2.3%).

This specific situations are related with the socioeconomic status established by the AMAI coefficient (2018), that represents in seven strata (AB to E, highest to lowest), the expenditure capacity and consumption habits for Mexico; in the case of the study participants, 53.1% were classified in the highest stratum (AB); 30.5% were located in the next, C+; 12.3% in the C and 4.1% in C-; it is important to highlight that people from the lowest socioeconomic status (D+, D or E) did not participate. From this remarks, regarding the participants in the study, are derived the main descriptive results on their access and use of the Netflix platform.

3. Results

3.1. Increase in the use of Netflix during the pandemic

From the results obtained by the survey, in Mexico, during the Covid-19 pandemic, there has been an increase in the daily use of Netflix (Figure 1). It is important to point out that, during the first months of the pandemic, Netflix place itself among the 3 most used mobile phone applications, only bellow Facebook and Microsoft Outlook (Statista, 2022). It is also important to highlight that, during the second trimester of 2022, up until August that year, a decrease in the daily access to the platform can be observed, even though it still was up to two times a week, suggesting a series of situations related with the return to regular in person activities at school, work, etcetera.

**Figure 1. Frequency in the use of Netflix platform**
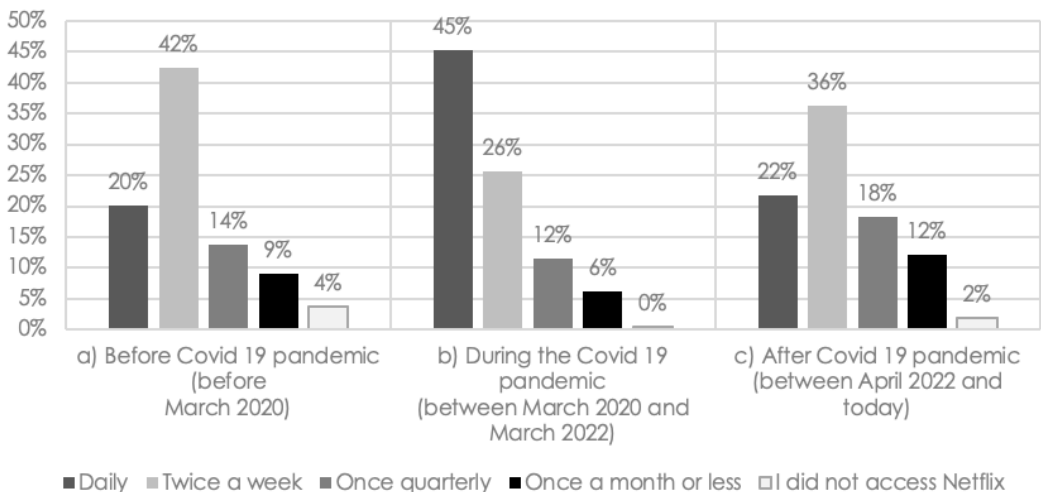
Source: elaboration from own data.

3.2. More selectivity in the content

Contents preferred by Netflix users before and after the start of the pandemic have varied. Particularly, the frequency in the reproduction of serial shows has diminished, but also, the number of visualizations

for documentaries increased. In the case of films, preferences show some changes, among which a decrease in the reproduction of fiction films can be observed (Figure 2). In this case, this factor can be analysed and poses questions in several perspectives or derivations regarding the quality of the catalogue and Netflix original productions. Also, the show reproduction in the platform had its height during the pandemic, even though currently has been decreasing, probably due to factors that require a more detailed review, such as the return to in person activities or, maybe, the quality of their stories.

**Figure 2. Types of content more frequently visualized in Netflix**
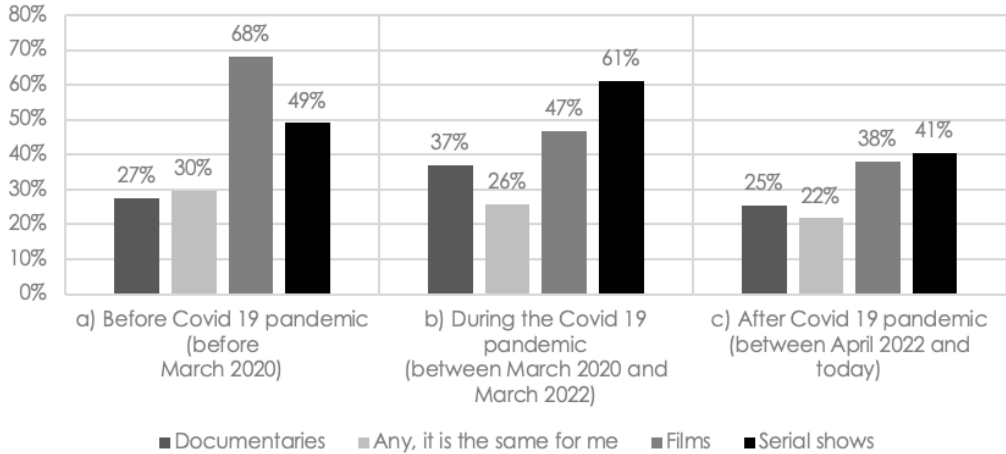
Source: elaboration from own data.

3.3. Changes and consistency in the selection of drama genres

Before the pandemic, regarding the preferred genres, there was a noticeable predilection for dramas, comedies and science fiction; later on, during and after the pandemic, although this three remain among the main preferences, it can be observed a bigger homogeneity in the diversity of available formats, probably due to the possibility of exploring more titles and productions, even though, as mentioned before, the case of documentaries stands out with an increase of visualizations during the pandemic (Figure 3).

**Figure 3. Preferred genre in Netflix content**
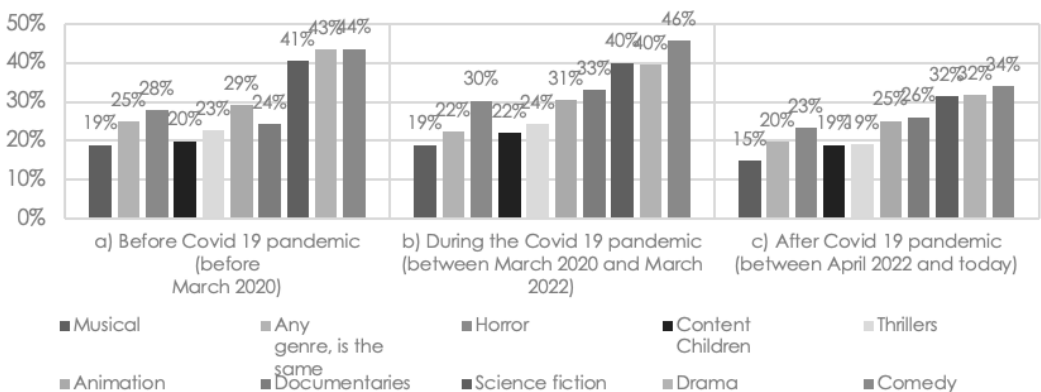
Source: elaboration from own data.

3.4. Shared access

Among the predominant practices of Netflix's users in Mexico is to access the service employing accounts of other user, like those belonging to a family member, friends or acquaintances (Figure 4). Also, it is noticeable that Netflix service is preferably acquired directly by the user, without the use of intermediaries such as Internet or telephone operators, due to the increase in costs.

**Figure 4. Means of access to the content of Netflix Platform**
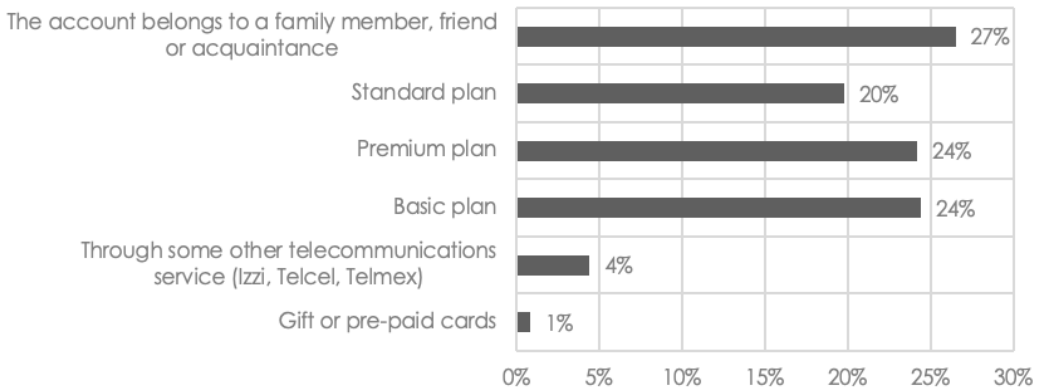
Source: elaboration from own data.

3.5. Transnational prevalence

In Mexico, among the main content preferred by the users during the pre and post pandemic periods, were those related to Netflix's original productions. Products such as *Stranger Things* (Netflix, 2016), *La Casa de Papel* (Netflix, 2017-2021), *Dark* (Netflix, 2017-2020), were in the most prominent positions in preferences, although, acquired content such as *Breaking Bad* (Sony Picture Television, 2008-2013) also had a high rank among the preferences (Figure 5).

**Figure 5. Titles of foreign films and shows seen in Netflix platform**
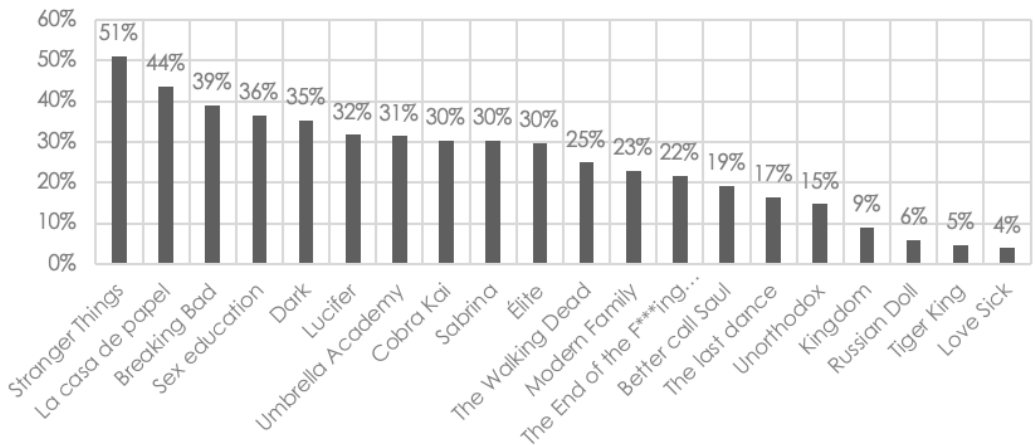
Source: elaboration from own data.

3.6. The "Roma" effect

The film *Roma* (Netflix, 2018), has been one of the contents with more visualizations in Netflix's platform in Mexico since its premiere in the same platform up until this date (Figure 6). Among some of the reasons by which *Roma* has become a phenomenon worth analysing, are those related with topics that go from its production to its distribution, which is, by itself, a case of study, since it managed, through a series of economic resources provided by Netflix, to generate a broad marketing campaign that did not require a projection in the chain Cinepolis, a Mexican movie theatre monopoly. Through a series of market strategies, the producer Pimienta Films, backed by Netflix, was able to articulate its own projection circuit in cinematheques, arthouse cinemas and cultural spaces through the entire country and in some regions of the world, generating an unprecedented cultural phenomenon in the Mexican context.

**Figure 6. Titles of Mexican films and shows seen in Netflix platform**
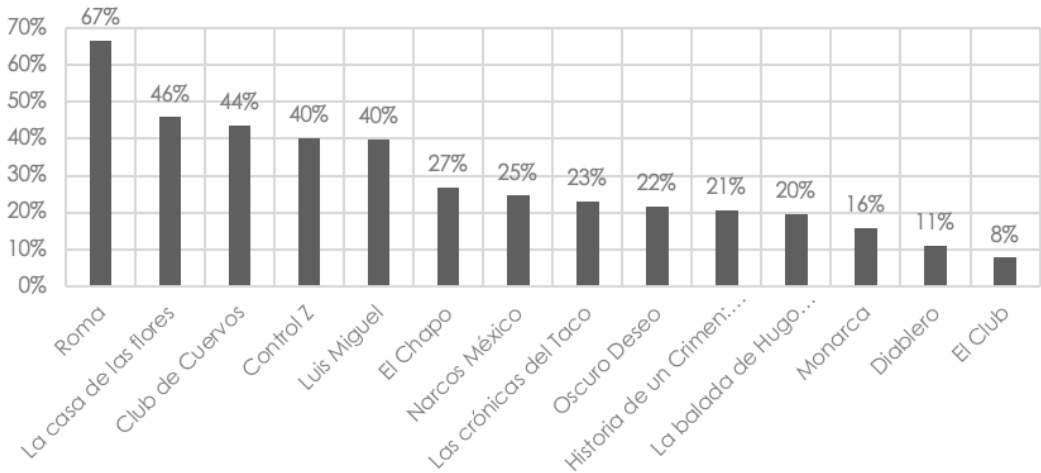
Source: self elaboration.

3.7. The permanent word-of-mouth

Recommendations on Netflix content during the Covid 19 pandemic in Mexico were established regularly through opinion exchanges between family, friends and acquaintances, although it is important to point-out that social networks) are now a fundamental element in the content selection (Figure 7).

Figure 7. Content recommendation mechanisms in Netflix
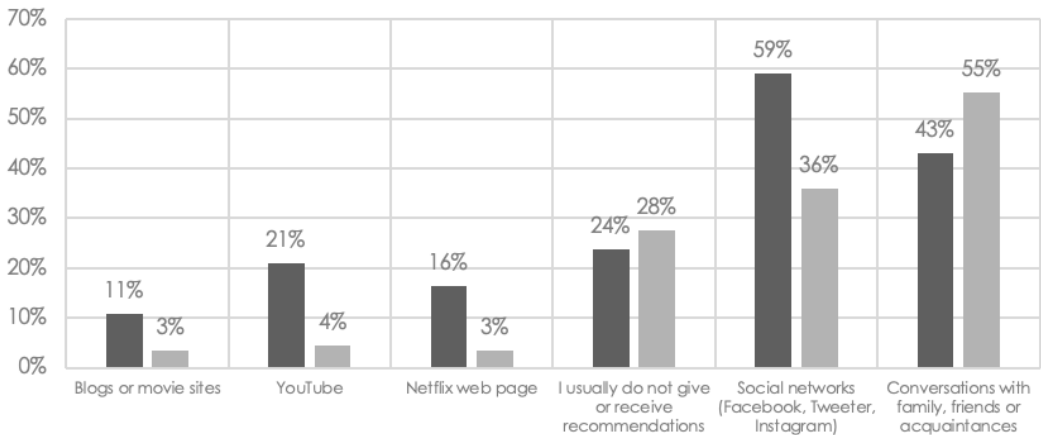
■ Through which media you search or receive recommendations on Netflix platform content that influence your decision of seeing something or not?

■ Through which media you provide recommendations on Netflix platform content?

Source: elaboration from own data.

3.8. The fandom as a data-base

Observation on expressions in social networks (Facebook, Twitter and Instagram) from fans of some of Netflix's content, expose that during the pandemic period there was not a high participation in Mexico regarding the creation of content related to series, such as memes, reports, reviews, videos, infographics, timelines, etcetera (Figure 8).

Figure 8. Fandom practices from Netflix's users
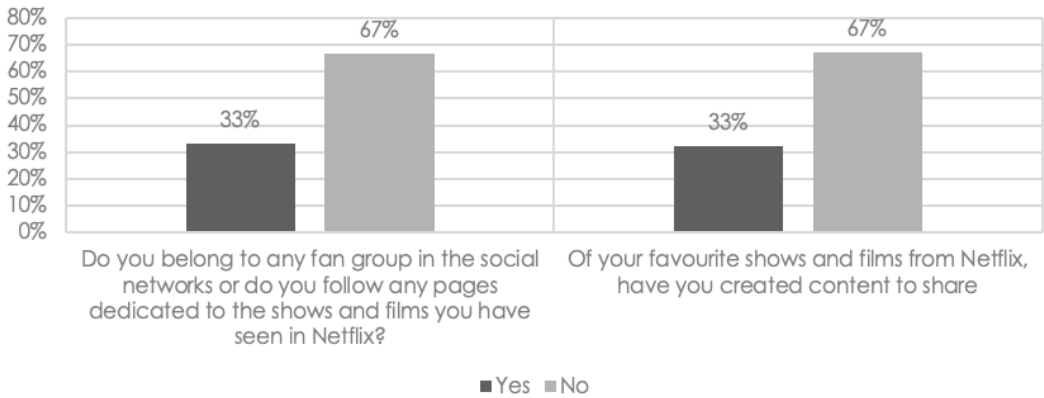
Source: elaboration from own data.

3.9. Corporate strengthening

In the case of Mexico, during the application of the first survey in November, 2020, Amazon Prime Video was the streaming platform most viewed by the users, after Netflix. Later on, during the application of the second survey in 2022, Disney+ turned into the preferred platform, over Amazon Prime (Figure 9). In this case, it is important to evaluate the impact in the market from Disney +, especially due to some information placing it above Netflix in the number of subscribers worldwide.

Figure 9. Besides Netflix, what other content platforms you have access to?
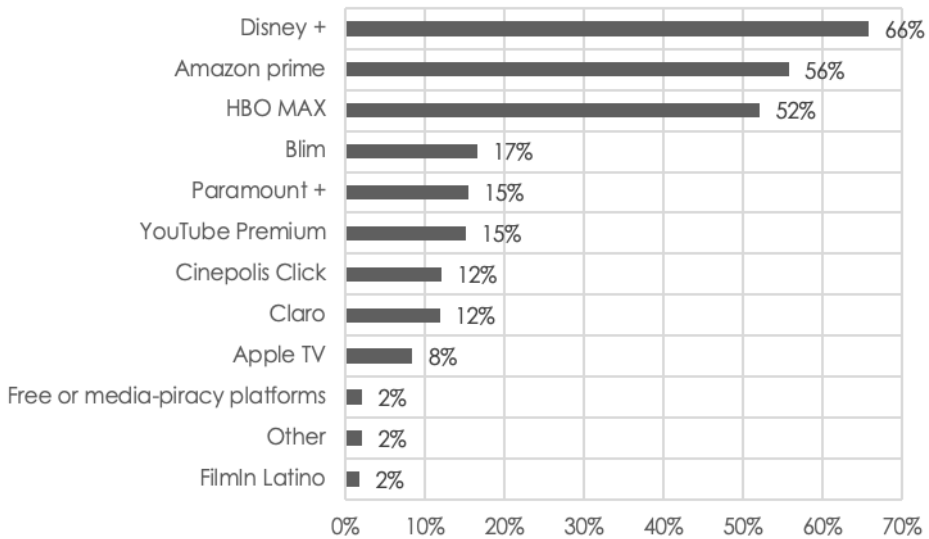
Source: elaboration from own data.

4. Discussion

The new experiences on visualization and reproduction of audio-visual content from digital platforms through Internet, as of now, is a process that coexists with the use of previous technologies, such as films, television and video. In this case, audiences combine the use of linear television and the digital platforms through mobile devices, tablets, computers, and decoder boxes, such as Apple TV, Roku, among other options. From this context, it is evident that exists a high diversity of possibilities regarding content circulation, but with the limitation that, since they are exclusively distributed only in a few platforms such as Netflix, they generate processes of concentration and restrict the access possibilities, developing in such manner power positions in the production, circulation and consumption (Hesmondhalgh & Lotz, 2020).

At this point, recommendation systems work as power circulation forms, and, also, the personalized configurations to see content result in a fundamental element to companies such as Netflix, that require to maintain its consumers using the service in a permanent manner in order to generate revenue, a difference with what usually happened during the broadcasting of television operators, in which the priority was to have a large audience in order to increase their income from advertisement. In this way, the business model of streaming platforms consists in offering an abundance of content, to establish a commitment from the personalization of the catalogue from the user.

Hence, the results presented offer data confirming that, during the Covid-19 pandemic in Mexico, Netflix consolidated its power mechanisms in the production and distribution of audio-visual content, but at the same time defined and established a series of consumption interactions that reinforced its position among the users. Among the main observations to the research questions posed, is the confirmation of the hypothesis presented at the beginning of this article, by introducing a series of processes that consolidate the position of power of Netflix in the Mexican market.

One of these processes can be defined as the selective look, which relates with the chosen or preselected content search systems, through filters with recommendations that can be shared (Lin, 2019). For instance, among the probable causes in the increase of visualizations of documentaries during the Covid-19 pandemic in Mexico, are those related to the interactions and comments in social networks (Vázquez, Negreira 6 Pereira, 2017). In this case, Netflix not only is producing shows or films, but also some brands that are integrated into the life of the consumer (Hills, 2018). Therefore, the consumption and affection processes for a storyline performed by the fan of a series, are used to develop and consolidate a data system, in which the user preferences identify to establish monetization processes for the platform (Gray, 2017).

Moreover, the Netflix original productions business model objective intent to invest in the development and production in different countries to establish a domain in global and local markets, which poses a threat for audio-visual diversity (García-Leiva, 2019). For instance, a German production such as *Dark* (Netflix, 2017-2020) or a Spanish production such as *La Casa de Papel* (Netflix, 2017-2021), upon their good reception by the Mexican market, generate a series of processes in which the production of original content by Netflix increases its value in the global markets, specially, by owning the exclusive rights of shows or films that have the possibility of attracting new subscribers and establishing protection barriers against the competition (Bouquillion, 2019).

Regarding the last point, some market research on film distribution indicate that producers still privilege the word-of-mouth strategy due to its importance in the film box-office gains (Herbera, Linares & Neira, 2015; Izquierdo, 2018). Particularly in the Netflix case, word-of-mouth interactions through social networks are fundamental to consolidate their content in the global markets (Rios & Scarlata, 2018; Basuroy et al, 2019). In this case, during the last times a series of permanent transformations have developed, among which stand out the adaptation to the digital format in terms of filmmaking, marketing and distribution, which implies redefinitions in the commercial structure in the case Hollywood, hence increasing its global preponderance in the emerging markets (Wasko, 2018).

The consolidation of streaming platforms such as Netflix, Amazon Prime, and Disney+, in the fim market, transforms the classic business model of the film industry, which was based on production, distribution and exhibition. Netflix consumption in Mexico during the Covid 19 pandemic was reinforced not only in economic and corporate terms, but also established and defined a series of agencies at the moment of consumption for their products. Hence, it is confirmed what is proposed by Hesmondhalgh & Lotz (2020), who observed that there are power pressures exercised by companies such as Netflix upon the production and distribution, as well as upon creators and audiences.

5. Conclusions

This research represents one of the first attempts regarding the consumption of Netflix in Mexico during the Covid-19 pandemic, in which it can be observed the consolidation of power circuits in this platform, in the interactions generated from daily habits and practices of users. Hence, it is also possible to point-out that Netflix business model trajectory departs from a capitalist process in which cultural production affects social relations and in which corporate concentration goes against cultural diversity, alterative policies for development and local cultures.

Therefore, it is noticeable that the offer of cultural production by Netflix is characterized by generating a property upon the rights of content, a "control" on the preferences of consumption through the "power of the algorithm", and an ideological dominance that intensifies the value of their cultural products in a digital environment (Garnham, 2011). From a major economic and advertisement investment, this company has developed a technological infrastructure that has information upon content and customers, who mutually reinforce the markets through immediacy and ubiquitousness of electronic commerce of goods & services.

The situations generated by the pandemic in the film exhibition context, in the form of restrictions to attend movie theatres, provoked the set-up of strategies of *majors* in Hollywood, to make simultaneous releases of their films through cinemas and the different platforms. The entrance and adaptation in the market of the online distribution has passed from being in an uncertainty stage due to several factors such as video quality, piracy, business model, to an acceptance and consolidation of market conditions generated by Netflix, as well as other operators such as YouTube, Amazon Prime Video, Hulu, HBO Max, etcetera.

The breakup with the traditional business model of the film and television industries, promoted by companies such as Netflix, has set up a series of innovations that undermine consolidated companies in the sector, which are confronted with new needs and requirements to adapt to such competition, even though, as suggested by Schumpeter (2012), a technological innovation through time will not reduce the distance between companies or affect their revenue, but instead will stir up a "creative destruction" effect, based on a series of transitions and strategies essential to the capitalist production system, in which economic structures are renewed in a permanent and cyclic manner.

Content transnationalisation is one of the strategies established by Netflix to insert itself in the capitalist development processes, characterized by, according to Ekecrantz (2011), three dimensions: 1) operation through several production centres, to influence global economy; 2) development of local projects to be promoted and sold as universal productions, regardless of the place in which they were produced; and, 3) deterritorialisation in communication practices.

Netflix acquired content and original productions cross national boundaries and transform themselves into global products, without being necessary to mention an identifiable place of origin, which generates that regional cultural expressions participate in hybridization processes, making hard to define the specific characteristics of a local culture, which in turn becomes a transnational culture inside the globalization processes, even though this apparent pluralism is limited to just a few products, thus not representing an alteration in the dominant cultural flux (Jin 2018; Elkins, 2019).

In Mexico, Covid-19 pandemic implied an increase in the use of Netflix services, by means of which its consumption has established a series of daily practices and habits in divergent forms and manners. From this observations it is convenient to make major approaches of qualitative research, in order to obtain more details on the interactions of the users regarding these and other audio-visual content platforms.

Among some of the topics pending on further research are those related with user agency and the identification of their consumption tastes and preferences to generate data bases. At a certain point, even though Netflix's algorithms are capable of identifying any movement before it can be performed, the user will always have the possibility of changing the process in content selection. Lastly, it is important to point out that the political economy of culture and communication must keep observing this consumption relations in an environment of technological and industrial changes and developments for the media (Wasko, 2018).

6. Acknowledgement

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