

De México p'al mundo y viceversa:

Netflix's branding articulations in the domestic Mexican market

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ABSTRACT

Branding has become a quintessential practice in modern day media corporations. The current globalized marketplace where there is an abundance of local (and global) identities, tastes and preferences, prompt companies to think globally, yet act locally. Netflix, as a global company that operates in distinct domestic marketplaces, has tailored its branding strategies to fit the local environments in which it exists. The Latin American market was one of Netflix's first strategic marketplaces for expansion in 2011 and has become one of the corporation's biggest markets. While recent research has begun with the investigation of Netflix's branding strategies in specific domestic markets, little research has focused on Netflix's local branding strategies in countries pertaining to the LATAM market. Therefore, the aim of this thesis is to find out what local articulations are present in one specific Latin American country: Mexico. The relevant research questions were the following: What are Netflix's branding strategies in Mexico? What are Netflix's local articulations in the Mexican market? In order to find an answer to these questions, this thesis employed a thematic content analysis. The systematic process entailed the creation of an initial and final coding frame which revealed the following themes: 'innovation', 'accessibility', 'content', 'local articulations', 'the Netflix experience' and 'competitors'. These themes reflected that Netflix employed three distinct branding approaches: portal-as-brand, portal-as-content and portal-as-producer. The latter is a new discourse that has scarcely been discussed in contemporary academic studies. Thus, when entering the Mexican market Netflix utilized a branding approach consistent with its global discourse, yet local elements were added to increase the relevance of the platform to the domestic market by emphasizing its (local) content on the platform. This approach changed once Netflix started identifying as a content producer in the Mexican market. The research in this thesis has shown that Netflix's intentions as a content producer – at least in Mexico – is to bring global content to the local market, but also bring the local content to the global market.

KEYWORDS: *Netflix, Branding, Globalization, Localization, Subscription video-on-demand, Mexico*

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1. Introduction

Multichannel media consumption, deregulation, global market economies, and heightened competition have increased the importance of branding to one of the most quintessential practices in modern day media corporations (Bottomley, 2015; Creeber & Hills, 2007; Johnson, 2007; Malmelin & Moisander, 2014). Scholars' attention to local and global branding strategies (Ford, Taylor, & Mueller, 2011; Papavassiliou & Stathakopoulos, 1997) in such a globalized marketplace, indicate the relevance of these approaches – which are particularly relevant in today's television industry.

Globalization of the television industry began in the 1980s when technology became more reliable and affordable, and regulatory changes allowed for international reception of satellite television (Chalaby, 2008). Ever since, the steady improvement and innovation of technology has further propagated globalization in the industry. In particular, the emergence of subscription video-on-demand (SVOD) platforms in the media landscape, is a clear manifestation of how television is crossing geographic borders and thus, becoming transnational and global (Lobato, 2019). For instance, both Netflix and Amazon Prime Video, as SVOD platforms, simultaneously operate in a large number of countries transcending national borders (Lobato, 2019). Cayla and Arnould (2008) specify that such corporations that operate on a global scale are in direct contact with the global consumer culture. A culture where a plethora of global and local identities co-exist with different tastes, genre preferences and cultural traits (Lobato, 2019; Makri, Schlegelmilch, & Papadas, 2018). In order to appeal to these identities, media firms have to think globally, yet act locally. It is in this globalized environment that branding practices become paramount. The reason why, as explained by Keller (2003), is that consumers often see brands as heuristic cues in their decision-making process: brands serve as a form of risk-reduction because the product or service becomes identifiable and recognizable by the consumer (Keller, 2003). They also facilitate the assignation of quality as a consequence of the set of associations that are correlated to the brand (Keller, 2003). Adapting a local, global or glocalized approach to branding can have different consequences for a brand and such approaches should largely depend on the market in which the (media) firm is operating (Grigorescu & Zaif, 2017; Kanso & Nelson, 2002).

Thus, transnational and global corporations should see the consumer culture as a "symbolic repertoire for the construction of identities and the shaping of consumer preferences"

(Cayla & Arnould, 2008, p. 101). Based on this "symbolic repertoire", companies can decide how they can adapt their global (and local) branding strategies. In this thesis, the aim is to analyze and understand how a transnational and global corporation, such as Netflix, utilizes these symbolic repertoires to adapt their branding strategies in a specific local market. Netflix is a prime example of a company that understands its global and local audience. Lobato (2019) noted that the wider Netflix's reach becomes, the more localized and geographically differentiated their services become. This is possible, because the tech-forward media company utilizes their global consumers' data on the platform to learn about their tastes, and viewing habits (Wagman & Barra, 2016 as cited in Lobato, 2019). In turn, this user feedback is also used to inform strategic moves regarding local and global promotional activities and marketing amongst other things. So, in a way, the company is drawing from an information database that functions as a symbolic repertoire to which they refer to when making informed decisions. What results from this approach is a "culture of Netflix" where the platform's use, viewing experience, and word-of-mouth differ across geographic locations (Wagman & Barra, 2016 as cited in Lobato, 2019).

With such personalized approaches, Netflix is widely recognized for its successful market entries and savvy branding strategies that appeal to the global audience (Escalada, 2020). Latin America (LATAM) is one of the successful markets that Netflix has entered into in 2011. Lobato (2019) mentions in his book that, at the time of this international expansion, LATAM was one of the most strategically important markets for the corporation. The reason being, countries in LATAM were a 'low-hanging fruit': for the most part they have a single regional language (Spanish), are familiar with the concept of Pay TV, have reasonable cable infrastructure, and a large middle class (Lobato, 2019). Particularly in Mexico, Netflix has been widely accepted. The media corporation has been the predominant player in the Mexican SVOD market. As of 2018, 8.3 million users were subscribed to an SVOD platform in Mexico, wherefrom 80% was subscribed to Netflix (Cahun, 2018; Cornelio-Marí, 2020). Not to mention that Mexico has become the most dominant exporter of Netflix's cultural products in LATAM (Jenner, 2018). This makes Mexico a cultural production hub and a country where the "culture of Netflix" as referred to by Wagman and Barra (as cited in Lobato, 2019) is present. Hence, the research question(s) in this research address Netflix's articulations in the local Mexican market. They are the following:

Main RQ: What are Netflix's branding strategies in Mexico?

Sub-RQ₁: What are Netflix's local articulations in the Mexican market?

This research utilizes news articles, official corporate documents, trade press coverage, audio interviews and audiovisual content that shed light on Netflix's local articulations in the Mexican market. This content was systematically analyzed by using a thematic content analysis as the data analysis method. Results show that Netflix's local articulations are in line with their global branding strategies yet are adapted to the Mexican market. More than that, the Mexican market has proven to be an important one for Netflix's core activities. This will be elaborated upon in the 'Results' chapter.

1.1. Relevance

This thesis addresses issues of both academic and social relevance. Regarding the latter, the social relevance lies in the importance of the findings for marketers who are interested in entering the Mexican market. The current research is focused on the global/local branding of a transnational and global media firm, and therefore, adds understanding and knowledge of how global corporations adapt to local circumstances to appeal to their target audience. So, the information can help steer successful market entries and managing international brands. Since traditional television brands are also incorporating streaming services in their businesses, these best practices could be adapted to enter the Mexican market.

Regarding the former, the academic relevance is two-fold: (1) this paper helps to fill the knowledge gap between the emerging industrial branding practices in the television industry and adaptation to international markets, and (2) it analyzes one of the first countries in Latin-America which Netflix expanded to, and that is under-researched in the academic field: Mexico. Thus, the current project can become a steppingstone for further research and also narrow the gap between the new practices in the industry as a consequence of globalization and how these new practices work in foreign markets.

1.2. Chapter outline

This first chapter served to briefly introduce the topic of this thesis by elaborating on the globalized environment that media firms are currently operating in, with Netflix included. This has gradually led to the research questions which are central to this thesis. The following chapter is the theoretical framework. Chapter 2 first addresses the technological changes that the

television industry has faced and is currently facing so that the reader can understand Netflix's positioning and branding as an online form of television. This is followed by a section that discusses branding and best practices to build brand equity – the value of a brand for consumers. Consequently, and lastly, this knowledge is placed in the discussion of Netflix's local and global branding strategies. Chapter 3 is the methods section which justifies the methodological decisions that were made when conducting this research. First, the data and its collection are discussed followed by the methodological approach taken in this research. Since this research employed a thematic content analysis, the qualitative procedure is explained in the context of the research. The next chapter (4) consists of the results of this thesis. Data analysis revealed six main themes with twenty-three subcategories. The main themes to be discussed are 'Innovation', 'Netflix accessibility', 'Content', 'Local articulations', 'The Netflix experience', and 'Competition'. This chapter is followed by the last chapter (5) which reaches a conclusion about Netflix's branding strategies in the local Mexican market and how local articulations help Netflix's branding in Mexico. Thereafter, the implications of this study and future suggestions for further research are explained.

2. Theoretical framework

This chapter firstly focuses on technological transitions in the television industry, whereunder the emergence of online television and its affordances are discussed. Terms like media convergence, user agency and ‘mass customization’ are points of discussion because they are important concepts that can give the reader an overview of the current developments in the television entertainment field – the same field that Netflix is operating in. Further, this chapter utilizes scholarly research to explicate branding, brand equity and its meaning for global corporations. Since the focus is on Netflix as a global entertainment firm, the media-tech firm’s branding strategies and practices are then discussed with the help of contemporary research, such as those by Wayne (2018), Pilipets (2019), van Esler (2020), and Daidj and Egert (2018). The last section of this theoretical framework addresses the Mexican media landscape, its history and what position Netflix and other online television platforms occupy in that scape. This section is particularly important for this thesis as the context/environment that Netflix operates in, is a crucial part for the analysis of the data in the ‘Results’ section.

2.1. The state of television

“Welcome to convergence culture, where old and new media collide, where grassroots and corporate media intersect, where the power of the media producer and the power of the media consumer interact in unpredictable ways” (Jenkins, 2006, p. 2).

Jenkins’ (2006) ‘convergence culture’ explicates the flow of content across a variety of media platforms as well as the migratory behavior of the contemporary audience from one media to another – or multiple media simultaneously. It implicitly provides a narrative of technological determinism where the affordances provided by the Web merge and blur the lines between the old and new media.

The field of television has always been subject to constant transition with technology as the catalyst (Dawson, 2010; Mikos, 2020). The changes were both tangible and intangible. For instance, flat-panel televisions with high-definition resolutions have replaced the traditional analog television set in modern homes (Dawson, 2010). What is more, users are no longer bound to the television set to have a television experience. Now, content can be consumed through every portable device, such as mobiles, laptops and tablets. The fact that content is now ‘on the

go' has affected the intangible: the users' experience. Users are now accustomed to watching high-quality television, when and where it best suits them (Dawson, 2010). Online television provides users with content libraries rather than scheduled programming, which increases the audience's ability to self-schedule (Lüders & Sundet, 2021). All these changes point toward the notion that users have more agency than before. Not only in when and where they want to watch, but also in regards to what they want to watch (Lüders & Sundet, 2021).

Concerning users' agency, Chamberlain (2009) argues that there is a double logic to this notion of human agency that works in favor of users, but also of corporations. The author asserts that users willingly allow their behaviors and actions to be constantly tracked, because they consider that the value or experience is worth the trade-off. So, what arises from this 'new' system of surveillance is an "emergent industry based on principles of mass customization" (Chamberlain, 2009, p. 15). Meaning, although users utilize the same media platforms, each experience is unique to each viewer at a particular moment in time (Chamberlain, 2009).

These shifts in materiality and experience has led some to consider the possible demise of traditional television (Ganos, 2011). Dawson (2010) argues, however, that although newer technological developments can challenge already-existing technologies, it is unlikely that these newer developments will entirely eradicate incumbent technologies. Similarly, it is not the purpose of this thesis to place online television as a radical replacement for traditional television. In fact, traditional television has been adapting to this 'new ecosystem'. For example, in 2016, the British broadcasting channel – BBC – decided to close its linear youth channel (BBC Three) to launch an online-only platform where the younger audience could watch content (Woods, 2017). Their ability to tell their stories on multiple platforms as well appeared to be a successful approach to appeal to their target audience (Woods, 2017). In addition, there are several instances where online TV and traditional TV co-exist or cooperate with the intention of mutual benefit. Hence, the intention is not to analyze Netflix's operations as a substitute of traditional television, rather how they co-exist and market themselves in a competitive market where media convergence, and "mass customization" seem to be the recent norm.

As a form of online television, Netflix offers the same affordances that were mentioned above. The next sections will elaborate on branding, brand equity, and how Netflix employs branding strategies to brand themselves on a global market. Additional points of discussion also include the relations between Netflix's practices and those of existing traditional television.

2.2. Branding

Branding as a marketing practice has been widely discussed and analyzed in the academic marketing field (Chaudhuri & Holbrook, 2001; Keller, 1993; Sallam, 2016). While each study is different in their focus and investigation of branding, the overarching conclusion is that branding can create brands that become a source of competitive advantage (Chaudhuri & Holbrook, 2001; de Chernatony, 2001; Keller, 1993). Basically, the aim of this practice is to differentiate a service, product or organization from that of the competitor (Aaker, 1996). If done successfully, brand differentiation can indeed serve as a form of leverage (Keller, 1993; Chaudhuri & Holbrook, 2001). Such leverage is dependent on a company's brand identity, brand image, and brand equity (Kapferer, 2008; Siegert, 2008). For clarification purposes: brand identity is not to be confused with brand image. While brand identity is what a brand stands for and how strategists want that specific brand to be perceived, brand image is about how the brand is actually perceived by the audience (Aaker, 1996).

Both brand image and identity are central to the discussion of branding. Nandan (2005) refers to them as “essential ingredients of strong brands” (p. 270). The reason being that a congruence in brand image and brand identity can enhance brand loyalty, brand trust and brand equity (Alhaddad, 2015; Nandan, 2005; Siegert, 2008). While all these outcomes are relevant, brand equity stands out as it is a combination of the elements mentioned above. This is very evident in Chan-Olmsted's (2008) definition of the concept. Brand equity is defined as the “value – that is, both tangible and intangible – that a brand adds to a product or service as a result of a combination of factors such as awareness, loyalty, perceived quality, images, and emotions that consumers associate with the brand name” (Chan-Olmsted, 2008, p. 66). When done correctly, brand equity has many advantages. Firms that have high brand equity enjoy greater profit margins, greater loyalty by consumers towards the brand, opportunities for brand extensions, and increased effectiveness of marketing communication (Keller, 2003). Because of these advantages, brand equity has become increasingly important for corporations.

So, based on the information written above, one can deduce that brand equity is built based on a chain reaction of favorable factors such as brand image, loyalty, and awareness. Accordingly, building customer-based brand equity consists of constructing a familiar brand that has strong, favorable and unique brand associations (Keller, 1993). Particularly in the current multimedia channel environment, there are some steps that managers should follow. Keller

(2010) delineated these steps. First, managers should create brand awareness around a brand, which is then reinforced by positive brand associations (Keller, 2010). Consequently, managers should focus on enhancing (potential) consumers' attitude and attachment to the brand. All these factors should lead to the last step of building brand equity, which is consumer activity – or in other words, the active engagement of the consumer (Keller, 2010).

Keller's (2010) steps to building brand equity point towards a process that is consumer-centric. This process is important, especially in industries that operate on a more intangible level, such as the media industry (Weinacht, 2015). The media environment is 'invisible', unstable, competitive and fragmented, wherefore media corporations rely on their most important assets: users (Ots, 2008). They try to build strong and long-lasting relationships with their audiences by offering value and differentiating from other competitors (Ots, 2008). In this case, brand equity helps because it defines the brand in terms of its uniqueness, importance and it guides consumer preference. So, through their brands, media firms make "value propositions about what their customers can expect in terms of type of content, interactivity, and user experience" (Ots, 2008, p. 3).

This thesis is specifically interested in investigating Netflix's branding strategies and practices. As a media-tech firm, Netflix is also offering an intangible service in the media industry. Wherefore, it would be interesting to analyze the firm's value proposition to its (potential) users in a specific market. Because of its wide and international reach, Netflix is considered to be a transnational and global brand (Lobato, 2019). According to Roberts and Cayla (2009) brand equity is important for global brands, yet how the branding is executed is more important. The authors argue that it is imperative that managers understand that there are similarities as well as differences in distinct markets, and they are not to be treated the same (Roberts & Cayla, 2009).

The remainder of this chapter will be addressing Netflix's local and global approaches in the globalized media marketplace. Before that, however, I consider that it is important to briefly address – in more detail – the technological developments that have shaped the current media scape that Netflix and other SVOD corporation operate in. This, in order to first create a foundation that will help the reader understand Netflix's place in the television and entertainment industry, and how the affordances of online television are pronounced in their positioning as a media-tech firm.

2.3. Netflix in the global scene

Netflix's history is one of constant – dynamic – transition. The company started as a local DVD rental and sales business in the United States in 1997 and grew exponentially – and globally – after adopting its streaming technology into its business model in 2007 (“About Netflix”, n.d.). As it grew, it became increasingly clear that Netflix is a first mover by nature. In its early years renting DVD's, Netflix was the first online DVD rental company that developed an interface which offered features of personalization where customers' movie renting preferences and patterns were leveraged to make suitable movie recommendations (Varadarajan, Yadav, & Shankar, 2008). Similarly, a couple years later, the company's move as the first entertainment platform into the streaming industry – again – gave the company big first-mover advantages as it acquired a large number of subscribers on a global scale without having to compete (Saurel, 2019).

The media-tech firm utilizes their international and global status to brand the platform. Having crossed most geographic boundaries in 2016, Netflix officially announced itself as a “global television network” (Elkins, 2019). More than the literal meaning of globalized television, the firm claims that its ‘cutting edge’ technology extends past geographic locations and demographic identities to create “taste clusters”. To elaborate, Netflix positions itself as an innovative technological media company that has sophisticated data analytics systems which are precise and powerful enough to cluster together like-minded individuals based on their viewing activities, scrolling patterns and other undisclosed data. While this is an elaborate branding approach to promote an innovative experience, it also promotes a narrative of a cosmopolitan and global society with Netflix as the catalyst (Elkins, 2019). Thus, Netflix is aiming to co-create a global brand that is shared between people around the world based on notions of cosmopolitanism and globality. Van Esler (2020) argues that Netflix's technology is indeed innovative as it is far from the norm of traditional television approaches. Conventionally, audience research would involve set-top boxes, surveys, viewer diaries and focus groups to provide better programming. What Netflix has managed to do, however, is passively collect viewer information on such a granular level that no other media corporation or traditional television channels have done before (van Esler, 2020). What differentiates Netflix further from traditional linear television, is the ability that consumers have to binge-watch content (Pilipets, 2019). This practice is partly enabled by the data that Netflix collects from its viewers.

According to Pilipets (2019), binge-watching has become one of Netflix's main marketing strategies in the course of streaming popularization and cord-cutting practices. Not only does the firm provide its viewers with on-demand access to all episodes of a newly released show without commercial interruptions, but it also keeps recommending content. Their recommendation system is designed to provide the user with more of what he or she 'wants to see' by fusing subscriber information with their tagging technology. What this does is it places "the idea of attentive, culturally informed spectatorship at the heart of the brand" (Pilipets, 2019, p. 2).

Further, contemporary research has shown that, in some cases, Netflix employs a rather 'antagonistic' approach towards linear television. Wayne (2018) studied how traditional television network branding is represented on Netflix and Amazon, as SVOD portals, and found differing results for each platform (Wayne, 2018). While Amazon created beneficial relationships with television networks in order to attract consumers and grow its retail business, Netflix actively positioned itself as "a replacement for linear television and views traditional television networks as its primary competitors" (p. 726). The firm intentionally makes itself the primary point of identification. Instead of acknowledging television network content on the platform, Netflix deliberately omits television network logos from its platform and brands exclusive content as Netflix originals (Wayne, 2018). Also, by emphasizing the affordances of the platform and its advantages for users, Netflix is actively using its service as a selling point, rather than the content library that it provides. Wayne (2018) used the term 'portal-as-brand' to refer to this strategy. Havens (2018) written work also corroborates Wayne's (2018) 'portal-as-brand' strategy. The author mentions that Netflix actively brands its service as a disruptive, tech-enabled, individualistic and youthful one that is "capable of satisfying immediate viewer desire" (Havens, 2018, p. 327).

Another way in which Netflix is directly competing with traditional linear television and networks is by producing its own original content. Netflix's constant and increasing investment in content production, shows the firm's intent to provide quality television to its consumers (Lobato & Lotz, 2020). As of 2016, Netflix invested around six billion dollars on original production and invested and collaborated with renowned talents, such as Shonda Rhimes (van Esler, 2020). This amount was increased to eight billion dollars in 2018.

2.4. Local positioning: Netflix and its partnerships

Next to Netflix's global branding efforts, the company also engages with the local culture and actors within that local media scene. More than merely addressing Netflix's local activities, the effects of Netflix's presence in a certain market can also be an indicator of the extent of Netflix's localization. Ramasoota and Kitikamdhorn (2021) studied the "Netflix effect" in Thailand in terms of its repercussions in the broadcasting and film industry as well as on regional regulations in the country. The most interesting points for this thesis are the consequences in the broadcasting and film industry. Albeit different from traditional television, over-the-top services like Netflix have disrupted the television industry in Thailand. Broadcasters have had to change their schedules to accommodate Netflix because it has become such a prevalent platform in the country. Netflix's case is exceptional in the sense that the media-tech firm is not only a content aggregator – like other platforms such as YouTube, Spotify and Apple iTunes – in its respective field. The firm is also a producer and distributor. According to the authors, Netflix has acquired Thai content into its catalogue from film studios, broadcasters and local content providers (Ramasoota & Kitikamdhorn, 2021). Another consequence of Netflix's presence in the Thai entertainment industry is the reduction of monopolistic power in the Thai film industry. While the monopolistic industry was reluctant of working with local independent filmmakers as well as actors and small studios, Netflix gave a platform to this local talent by investing and integrating them into their platform (Ramasoota & Kitikamdhorn, 2021). This is a clear manifestation of the global firm with local actors.

In addition to localized articulations, co-branding is another way to bring the global brand closer to the local audience. It is a nontraditional and innovative approach to marketing that surfaces in environments where there is (intense) competition and dynamism (Desai & Keller, 2002). Scholarly research that focused on the effectiveness of co-branding – or cooperation – corroborated the benefits of this approach for parties involved (Besharat, 2010; Grossman, 1997). To name a few, global brands can enter foreign markets easier and at a reduced cost as well as profiting from favorable brand spillover – the brand image of one brand is transferred onto the other (Rodriguez, Souza, & Leitão, 2011).

Media firms operating in the television and broadcasting industry often employ this nontraditional mode of branding to achieve their strategic end goals (Chan-Olmsted & Shay, 2015). The aim is to firstly, learn about the audience and bring relevant brand messages, and

secondly to make the brand omnipresent across all possible platforms to reinforce and maintain brand associations (Jenkins, 2008). As a transnational and global media-tech firm, Netflix has been the subject of academic studies that have investigated the firm's partnership activities. For instance, Daidj and Egert (2018) examined Netflix's presence in France and how the firm co-exists with other national incumbents. What the authors found was that in order to comply with French regulations and compete with powerful incumbents, Netflix engaged in cooperative links and also partnered with telecom providers. The cooperative links represented television channels that bought TV show rights from Netflix and vice versa, making the relationships between these parties mainly dyadic and 'simple' in nature (Daidj & Egert, 2018). The media-tech firm's distribution agreements with telecommunication providers, however, were much more vital to Netflix's presence in France. At the time (2014), French regulations were set in place to protect France's film financing system, which is built on subsidies that are generated by taxes (on the movie's tickets) and investment quotas from pay TV and free-to-air channels (Daidj & Egert, 2018). Thus, without partnering with telecom providers, it would have been impossible for the firm to enter the French market. These partnerships entailed access to Netflix through the providers' set-top boxes by paying for the streaming service through existing customer monthly contracts (Daidj & Egert, 2018). Ultimately, what Daidj and Egert (2018) argue throughout their paper is that Netflix – as a global brand – can acclimate to national circumstances and form cooperative relationships with competitors for various reasons – whether it be regulatory, technological, or commercial.

Further scholarly works on Netflix's localization strategies reveal a similar course of action in distinct national markets (Wayne, 2020; Wayne & Castro, 2020). In their work, Wayne and Castro (2020) denote that Netflix's localization practices in Israel and Spain take place on micro-, meso-, and macro-levels. So, somewhat similar to Daidj and Egert's (2018) findings, Netflix's best local practices in these markets entail adaptation to local language, taste and content (micro-level), partnerships with local actors (meso-level), and regulatory and infrastructural commitments (macro-level). Wayne (2020) elaborates more on Netflix's local operations in the Israeli market and coins the term 'portal-as-content'. By partnering with national television providers in the country, the media-tech firm managed to position itself in the Israeli market. Here, the focus was not on Netflix's service. Rather, it was on the content that Netflix provided to the local audience. This 'portal-as-content' strategy is understandably

different from Wayne's (2018) 'portal-as-brand' strategy. According to Wayne (2020) it appears that "streaming services are appearing as content-based forms of television in national markets" (p. 152).

Ultimately, relationships like the ones that Netflix had with telecommunication providers and television channels in the French, Spanish and Israeli market are, according to Lee and Griffith's (2012) adapted governance value analysis (GVA), relational weak ties. This means that both parties relied on each other for mutual value creation without altering their value chain – through either horizontal or vertical integration (Lee & Griffith, 2012). Seeing that Netflix has forged relationships in different countries in order to achieve global expansion, the aim of this thesis is to analyze whether these relationships exist in the Mexican market, what the nature of these relationships are, and how they contribute to Netflix's goals of market expansion.

2.5. Mexico: the media landscape

The history of the Mexican media landscape is one of complex relationships and power structures. The television sector in Mexico has gradually shifted from a near-monopolistic – and later near-duopolistic – market to one of effective competition and constant (infrastructural) development (Saenz De Miera, Rovalo, & Morales Contreras, 2017). It is in this environment that Netflix is also operating. Therefore, this section of the paper will briefly recapitulate on the historical evolution of the television market in Mexico, and how infrastructural developments are allowing for media convergence and propelling healthy competition. This, in order to understand Netflix's place in the Mexican market, and how this might affect Netflix's branding and positioning in said market.

Much like other developing countries, Mexico witnessed a slow, yet gradual transition from fixed landlines, to radio stations and television sets (Saenz De Miera et al., 2017). The establishment of both radio and television in the Mexican market was the result of a collaboration between radio proprietors, who would later converge and become Televisa – Mexico's biggest commercial television provider from 1973 to 1993 (Saenz De Miera et al., 2017; Gutiérrez Rentería, 2007; Sánchez Ruiz, 1990). Televisa's coverage became nation-wide, with the exception of smaller states that were less attractive to the company's commercial purposes (Espino, 1979). What was remarkable about Televisa at the time, was the media company's effective vertical and horizontal integration: the company was the creator/producer as well as the distributor of its own content on different platforms – radio, television

(Gutiérrez Rentería, 2007). These competitive advantages made it possible for Televisa to maintain near-monopoly for twenty years. This ended, when state-owned – TV Azteca – was launched and became Televisa’s direct competitor in 1993. Starting this point, scholars started referring to the Mexican television market in terms of a duopoly (Gutiérrez Rentería, 2007; Vázquez-Maguirre & Hartmann, 2013). Together, the companies provided 90% of the audiovisual content in the industry and possessed 80% of the total television concessions in the country (Villamil, 2006 as cited in Vázquez-Maguirre & Hartmann, 2013). What is most interesting about this duopoly is (1) TV Azteca’s approach to overcome entry barriers, and (2) the companies’ active efforts – nonmarket strategies – to remain relevant in the media/television industry (Gutiérrez Rentería, 2007; Vázquez-Maguirre & Hartmann, 2013).

Given the near-monopolistic structure, Televisa’s position in the television market was consolidated. The company was a well-established corporation that had achieved vertical and horizontal integration with twenty years of experience in the media industry. In addition, the monopoly from Televisa meant that the level of media concentration in Mexico was 1 at the time. Meaning that the company had twenty years to secure its position in the Mexican media market (Gutiérrez Rentería, 2007). So, when TV Azteca was entering the market, it needed to effectively position itself against the biggest competitor in the market.

After investigation, Gutiérrez Rentería (2007) found that TV Azteca adopted a similar strategy to that of the market leader, Televisa. TV Azteca focused on its vertical and horizontal integration by networking with and acquiring producers and distributors, to create a ‘soap opera factory’ (Gutiérrez Rentería, 2007, p. 73). Especially its horizontal integration strategies were aimed towards the internationalization of the company; to reach the Hispanic audience outside Mexican borders. Interesting enough is how they achieved their audience both nationally and internationally. TV Azteca’s approach was to create programs based on differentiation and innovation. Contrary to Televisa, TV Azteca refrained from the “Cinderella” formula and instead opted to create original stories based on social realities in Mexico. Their stories were about drugs, economic inequality, insecurity and corruption. These stories resonated in other Latin-American countries since these stories are relatable to the intended audience (Gutiérrez Rentería, 2007). This was a conscious choice on TV Azteca’s part as they believe that “Mexico’s histories are, in great part, the histories of Spanish-speaking America – we share the same language and culture, the same dreams and passions” (Salinas, 1997, p. 27). Ultimately, TV Azteca’s intention

was to use “star” content – soap operas, news and sports programs – to appeal to the middle-class audience (Gutiérrez Rentería, 2007).

The effectiveness of these approaches can be measured against TV Azteca’s success to become Televisa’s main competitor in a near-duopolistic structure. As the two main linear television providers in the country, both companies have tried to secure and maintain their position through lobbying and launching “aggressive” campaigns against competitors. Both Televisa and TV Azteca are known to have created extensive relationships with politicians and congressmen in the Mexican government. Their relationship was based on reciprocity: politicians would grant licenses and advocate for legislations in favor of the duopoly, and in exchange the politicians would get special coverage on the duopoly’s channels (Vázquez-Maguirre & Hartmann, 2013). They have also launched “aggressive” campaigns to avoid entrants from obtaining national TV concessions (Vázquez-Maguirre & Hartmann, 2013). Whether these actions are ethically correct are outside of the scope of this thesis. However, they show the power and influence that these two Mexican giants have in the market, and which competitors must compete against.

For the last two decades, the government has been actively trying to foster a healthier competitive environment for other incumbents in the Mexican media field. For instance, it is enforcing regulations and sanctions that guarantee free competition. Thus, working against disproportionate mergers and monopolistic practices (Saenz De Miera et al., 2017). With technological advancements and the rising digital economy, the Mexican government is also trying to enforce the rules and regulations in a manner that continuously works in the favor of the market as a whole (Saenz De Miera et al., 2017). Especially, in Mexico, the development of the digital economy has been relatively slow. Mecinas Montiel (2016) speaks of a digital divide where Internet penetration in Mexico reflects the social inequalities and poverty that are present in certain groups, cities and even areas in the country. As a result, Internet penetration is mostly visible amongst wealthy groups in urban areas. A national survey revealed that the Internet adoption rate in Mexico’s rural areas is 39.2% in contrast to 71.2% in urban areas (Martínez-Domínguez & Mora-Rivera, 2019). Although disproportionately, however, Internet penetration is increasing in the country.

At the beginning of 2011, the growth and potential for Internet penetration was the factor that drew Netflix to Mexico. At the inauguration, Sarandos – Netflix’s chief content officer at the

time – expressed: "We have done public researches before coming [to Mexico]. We noticed that the adoption rate has been increasing. Especially, when it comes to Internet in households. This is why we wanted to come [to Mexico]" (Rubio, 2011). Netflix's executives saw the increasing Internet adoption rate as an opportunity to be a first-mover in the Mexican media market because households in the "Latin-American (LATAM) market were four times more likely to have broadband Internet connection than households in Canada. Therefore, there is a lot of space to grow" (Netflix Inc., 2011, p. 6). While Netflix's arrival in Mexico in 2011 was earlier than other incumbents, it was not the only form of "Internet television" in the country. The streaming platform, iTunes, had been offering video-on-demand services since 2009: consumers could buy content and watch it online (Cornelio-Marí, 2020). Nonetheless, Netflix's innovative proposal and narrative as a new form of watching television for a fixed monthly subscription is what differentiated its proposal from iTunes (Cornelio-Marí, 2017).

The migration to digital television, according to Cornelio-Marí (2020), began when local competitors started to adopt Netflix's business model. Only months after Netflix's arrival, Televisa launched VeoTV, América Móvil launched Claro Video, and Grupo Salinas – the proprietor of TV Azteca – launched Totalmovie (Cornelio-Marí, 2020). Towards the beginning of 2014, the Mexican media scape counted seven major competitors: Claro Video, Sony's Crackle, Televisa's Veo TV, Walmart's Vudu, Netflix, TV Azteca's Totalmovie and Klic (Cornelio-Marí, 2020). Up until that point, Netflix was competing mainly with local competitors. It was not until 2016 when bigger companies like Amazon and HBO entered the Mexican streaming market. Despite the competition, however, Netflix has been the predominant player in the Mexican SVOD market. As of 2018, 8.3 million users were subscribed to an SVOD platform, wherefrom 80% was subscribed to Netflix (Cahun, 2018; Cornelio-Marí, 2020).

This section served to show Mexico's media landscape in an age where the digital economy is only growing. The country's media landscape transitioned from a monopolistic/duopolistic structure where Televisa – and later also TV Azteca – were the only providers of television content in the country to one of increased competition. As technology advanced, and the 'Internet television' arrived in the country, the structures changed. Another adjacent market was established where Televisa and TV Azteca were no longer the main leaders, they were competitors. The fact that Netflix was the first-mover and, to some extent, has propelled the SVOD market in Mexico, shows the advantage that the company has in the SVOD

market. Nonetheless, it still must deal with local incumbents that are transitioning to the streaming industry. Therefore, it will be interesting to investigate Netflix's efforts to maintain points of parity between its service and other local Mexican streaming services that are emerging.

Conclusion

The content in this chapter discussed branding and its value for global corporations. Current technological developments have (re-)shaped the television industry, wherefore the branding of online television follows a different narrative than those of traditional linear television. Further emphasis was placed on how Netflix uses these affordances to position the company as a technological innovation that is better than traditional television. The media-tech firm draws from these technological affordances to make claims about tailored individual experience (personalization) and unlimited content which enable binge-watching practices. The firm's core activities revolve around notions of cosmopolitanism and globality.

Contemporary research has also shown that Netflix operates at different levels in national markets. Their most salient local strategy is their partnerships and collaborations with local actors. The motive for these partnerships can vary, yet the primary reason is so that Netflix can get access to the national audience through these local actors. What was clear from this chapter is that Netflix operates on both global and local levels.

3. Methods

This section justifies and rationalizes the methodological choices utilized in this thesis. First, the data, the collection process and the reasoning behind the selection of the data for the focused coding process will be explained. This is followed by a brief explanation of the methodological approach used in this thesis – thematic analysis – and how it was employed to analyze the data.

3.1. Data (collection)

Data was collected between 2011 – the year that Netflix launched in Mexico – and 2021 as Netflix still operates in the market. In total, fifty articles were collected varying from digital news articles, trade press coverage, (audio) visual content, corporate press releases to blogs posted by Netflix. These materials were chosen because they (1) addressed Netflix and the Mexican industry, (2) included interviews with Netflix representatives, and/or (3) were official communications made by other official corporations or Netflix itself. From these fifty items, eight articles were deliberately chosen and subsequently coded to create an initial coding frame. This initial coding frame, then, became the reference to code the remaining forty-two items and was adapted where necessary. After finishing the first and second phase of coding, however, I decided to place focus on thirty-two items that possessed the most relevant information about Netflix’s brand identity and brand strategies. These include three Netflix blogs, six videos from Netflix representatives introducing Netflix, six promotional videos released by Netflix, one digital news article from ‘Forbes.com’, one news article from ‘BBC Mundo’, one news article from ‘Infobae.com’, one digital article from ‘nextvlatam.com’, and one online article from ‘etcetera.com.mx’. Other sources included five press releases – from Netflix, AT&T, Televisa, Telmex and Telefónica – three articles from Mexican trade press magazine ‘Expansión.mx’, two from ‘El Financiero’, and two from ‘El Universal’.

Each of the fifty items were found online and were public at the time of recruitment. Press releases were found on the respective websites of the diverse telecommunication corporations, whereas audiovisual content was found on YouTube by searching keywords such as “Netflix in Mexico”, “Netflix Latinoamérica” and “Netflix LATAM”. This search led to the official YouTube channel of Netflix as well as other suggested videos. The suggestions were extremely helpful as they included interviews of both Ted Sarandos and Reed Hastings speaking on the relevance of the Mexican market. Trade press coverage, on the other hand, was found

through Google with the following keywords: “Netflix en Mexico”, “Netflix y América Latina”, “Reed Hastings y Netflix Mexico”, “Ted Sarandos y Netflix Mexico”, “Gestión de marca y Netflix Latinoamérica” [translation: branding and Netflix LATAM]. In the end, these items included diverse Netflix representatives/spokespersons, and covered every year of the stipulated ten-year frame.

3.2. Thematic content analysis

The research at hand concerns the branding strategies that Netflix employs in the Mexican market, and thus, by default, also concerns the local articulations that are to be found within these branding strategies. With this purpose, a qualitative content analysis seemed like the most suitable approach to analyze and understand the articulations that are present in the content. Content analysis (CA) entails subjective interpretation of the content “through the systematic classification process of coding and identifying themes or patterns” (Hsieh & Shannon, 2005, p. 1277). According to Mayring (2015), the premises of the qualitative CA method are strongly rooted in communicative sciences. What this means is that the communication material that is of interest is analyzed and understood from a particular context. In other words, the researcher analyzes the material taking into account its origin and the effects of the material in that particular environment (Mayring, 2015). This particular characteristic of the CA method is relevant for this thesis because it allows the interpretation of Netflix’s branding communication within the context of the Mexican television entertainment field. The aim of this is to provide a relevant analysis that fit the circumstances of the Mexican media market since little research has focused on this market. So, this thesis utilizes the means of a qualitative content analysis.

To be more specific, this thesis employs a thematic content analysis. Thematic content analysis is also a method for identifying, analyzing and interpreting patterns of meaning (‘themes’) within qualitative data (Braun & Clarke, 2013). What makes this qualitative method relevant in the context of this study is its flexibility. Thematic CA gives researchers flexibility in terms of sampling size, methods for data collection, and approaches to meaning generation (Clarke & Braun, 2015). Especially when it comes to data collection, it is allowed to select the units of analyses that potentially capture the most interesting features of the data – including the smallest units of analyses (Clarke & Braun, 2015). This knowledge of thematic CA, thus, allowed the focus on specific units of analysis that were considered the most relevant to building themes around Netflix’s branding strategies and local articulations in the Mexican market.

When it comes to meaning generation, Elo and Kyngäs (2007) elaborated on the two approaches employed in qualitative content analyses: the inductive and deductive approach. While inductive approaches are commonly used when there is a lack of knowledge in a specific field, deductive approaches are employed when the analytical structure is based on previous knowledge (Elo & Kyngäs, 2007). One advantage of qualitative content analyses – thus, including thematic analysis – is that the researcher has the ability to combine both inductive (‘data-driven’) and deductive (‘concept-driven’) processes to attain a final coding frame with themes that are related to the data (Schreier, 2014). This thesis followed this process to meaning generation. The reason for such an approach is that while there are relevant research on branding strategies in (media) corporations (Chan-Olmsted, 2011; Malmelin & Moisander, 2014; Wayne, 2020), less is known about branding strategies and local articulations in the SVOD entertainment industry – especially in a specific local market, such as Mexico. So, the development of themes and categories, in this case, were partly based on existing knowledge and partly based on categories that emerged from the data itself. This, to ensure that the results of this thesis would be relevant and insightful to how modern-day SVOD media corporations approach local markets.

This process to meaning generation followed systematic steps. According to Peterson (2017) the process of building a final coding frame consists of two iterative processes: open coding and focused coding. During open coding is when the researcher comes in initial contact with the data and starts identifying primary codes, whereas the focused coding phase is when the researcher starts synthesizing the data and identifying patterns. Accordingly, this thesis employed the same process in three phases: (1) building the initial coding frame, (2) re-assessing the coding frame, and (3) creating the final coding frame.

To start with, the open coding process was the first interaction with the data. In this first phase, eight articles were examined to identify relevant concepts with their respective properties and dimensions; where applicable some concepts were created based on previous knowledge. This first round of coding resulted in fourteen concepts, which were then clustered together – focused coding – in four distinct themes based on their relationship with each other and how they represented and explained the theme. Afterwards, the remaining forty-two items were analyzed with the initial coding frame that resulted from the first analysis. The coding frame was then re-assessed and adapted when necessary to encompass new concepts that were found in the new items.

Seeing that the thematic content analysis is a flexible method when it comes to meaning generation, I chose to conduct a final focused coding on purposefully selected items that would deliver the final coding frame. So, as mentioned before, the thirty-two most relevant pieces of content were chosen to form part of this final phase. These thirty-two items delivered twenty-three concepts pertaining to six different themes (see Appendix B). The themes (with their corresponding definitions) were the following:

INNOVATION: any information or statement that addresses Netflix as a service that is technologically innovative, and/or invoking qualities that pertain to nontraditional television, e.g. adaptive streaming.

CONTENT: any information or statement that addresses the content on Netflix's platform, whether it be about quantity, quality, or its production.

ACCESSIBILITY: any information or statement about the ability of the audience to acquire Netflix through conventional or other unconventional, but easier methods, such as third-party suppliers.

LOCAL ARTICULATIONS: any statement or information that indicates Netflix's adaptation to the Mexican market. This includes investment in local talent, local promotional activities, pricing, local services, subtitling and/or dubbing.

THE NETFLIX EXPERIENCE: any statement or information addressing the social experience that results from Netflix content consumption as well as using the platform itself.

COMPETITORS: any statement or piece of information that addresses Netflix's competition in the Mexican media scene, whether it be legal or illegal forms of competition.

Each of these categories and their respective concepts will be elaborated upon in the next chapter. The results will be discussed based on the theoretical perspectives that were discussed in the theoretical framework of this thesis.

Conclusion

This chapter discussed the data collection as well as the methodological reasoning of this thesis. Based on academic information, this research purposefully employed a thematic content analysis

in a systematic manner. This happened in three phases: creating initial coding frame, re-assessing the frame, and creating a final coding frame. The eight items that were analyzed during the initial open coding phase created an initial coding frame that would serve as a reference for the coding of the remaining forty-two items. Ultimately, the focus was placed on thirty-two items that were deemed more relevant to answering the research question. This resulted in twenty-three concepts spread across six distinct themes. The next chapter will discuss the results in more detail.

4. Results

The current chapter discusses the results based on the findings which are in the final coding frame in Appendix B. As mentioned in the previous methods chapter, this research analyzed a total of fifty items, wherefrom thirty-two items received a full analysis. These items were chosen because they embodied the most relevant results found across the whole data set and they contained important statements made by Netflix representatives. In total, the full analysis of these selected items resulted in six themes with twenty-three subcategories that are in certain contexts related to each other. So, the sections in this chapter are dedicated to explaining each theme with their corresponding subcategories in detail. Where relevant, it will also be discussed how these themes and/or subcategories relate to each other. This, in order to create an accurate picture of Netflix's branding and how this has created the brand image that Netflix has today in the Mexican market.

The statements included in this results section are from Netflix representatives that operate in Mexico. For instance, the communications manager from Netflix LATAM – Mary Carmen Albarrán provided information about Netflix's branding in Mexico and their recommendation and personalization system. Jonathan Friedland, who was the vice-president of global corporate communication at Netflix, was responsible for the communication of Netflix at the beginning of Netflix's market entrance in Latin-America. Besides them, most statements that are included are made by Reed Hastings, the chief-executive officer at Netflix or by Ted Sarandos, the chief content officer and Co-CEO of Netflix (at the time of writing this paper). While Reed Hastings was more engaged with the communications of Netflix at the beginning of the roll-out of the platform in Latin-American countries, Ted Sarandos is currently – at the time of writing this thesis – actively participating in Netflix's communications in Latin-America and Mexico. He is actively involved with the Mexican talent and is physically present in the Mexican scene, which can be seen by the number of interviews and speeches that the chief content producer has given in Mexico. The remaining official documents such as press releases, Netflix blogs or promotional videos were either co-signed or released by Netflix itself, wherefore I consider them to be official statements made by Netflix.

Collectively, the statements and information in this chapter will help generate an answer to the research question central to this thesis. Thus, the focus lies on Netflix as a global brand and how local articulations are present within their overarching global strategies in the Mexican

market. The following sections will discuss the following themes: innovation, content, Netflix accessibility, local articulations, the Netflix experience, achievements and competitors.

4.1. Innovation

The theme ‘innovation’ was one of the themes that emerged from this thematic analysis. It represents all information or statements that discuss Netflix as a service which rests on technological innovation or that describe qualities pertaining to nontraditional television. This theme occurred mostly at the beginning of Netflix’s entrance in the Mexican market in 2011, where representatives were emphasizing the affordances of Netflix. The subcategories pertaining to this theme are the following: ‘innovative technology’, ‘availability on multiple devices’, ‘ease of use’, and ‘personalized recommendations’.

These subcategories relate to each other in the sense that they all emphasize Netflix as a platform enabled by technology that gives the user access to a catalogue of content. As Wayne (2018) denotes, this pertains to the ‘Netflix-as-portal’ strategy. The fact that this theme was more present in the beginning of their market entry, shows the intent of Netflix to differentiate itself from competitors in the Mexican field. Considering the Mexican media landscape, at the time, Televisa and TV Azteca were operating in duopolies, and were providing linear television in most Mexican homes (Gutiérrez Rentería, 2007; Vázquez-Maguirre & Hartmann, 2013). One way that Netflix distinguished itself from linear television was by placing Netflix as a form of ‘innovative technology’ that gives the user instant access to content. In Netflix’s introduction video to Latin-America, Reed Hastings presented the platform as one that has “revolutionized entertainment” (16:1), because it is an “online subscription streaming service with unlimited television shows and movies” (16:2). Another Netflix representative also said the following (24:4): “Todo viene a través del Internet. No se ocupa nada del disco duro de la máquina. Todo es a través de transmisión instantánea” [“Everything comes from the Internet. Nothing is saved on the device’s hard drive. Everything happens via instant transmission”]. Naturally, these statements emphasize qualities that are different from linear television. As a form of online television, Netflix can provide users with content libraries where they can choose what they want to watch as opposed to scheduled programming on linear television (Lüders & Sundet, 2021). This of course was also a branding strategy to create awareness of this new form of watching television in a market where Netflix would become the first streaming service. Creating brand awareness is the first step to building brand equity (Keller, 2010).

Another way that Netflix branded its platform is by highlighting its convenience. The platform would be “easy to use” and “available on multiple devices”. These were also reoccurring subcategories in almost every communication about Netflix at the beginning. On multiple occasions, Reed Hastings, pointed out that the user just has to “click and watch” (16:3). While making a product demonstration in Mexico, he also said the following: “You see it’s very fast. Within ten seconds, it’s starting and playing. So, it’s very easy to use.” This demonstration showed the audience that there are four simple steps to follow when watching Netflix: signing in, searching for content, clicking on the content and watch the content. Again, this was the introduction of the platform for an audience that up until that time was mainly consuming content on linear television (Vázquez-Maguirre & Hartmann, 2013). Showing the crowd that the technology was easy to use would make the platform more enticing to the target audience. Netflix’s ‘availability on multiple devices’ was also an innovative point that Netflix representatives were constantly pointing out: “We have also started focusing on new platforms, like televisions, Android phones, Apple TV, and before the end of the year, our service will also be available on Apple devices and Microsoft’s Xbox 360” (5:3). What’s more, Jonathan Friedland, vice-president of global corporate communication at Netflix in 2011, mentioned that Netflix’s streaming technology “fluctuates and adjusts immediately to the quality of the broadband” [... Que ajusta y se adapta inmediatamente con las condiciones de la banda ancha] (23:3). Meaning that with Netflix, users could watch content everywhere based on the quality of their internet service. This, again, highlights another affordance of online television as users can watch content when and wherever they please – including ‘on the go’ (Dawson, 2010). As mentioned in the theoretical framework, broadband connectivity is increasing in Mexico. However, most of this increase is witnessed in urban areas rather than rural areas, which means that connectivity and broadband quality was, at the time, an important topic of discussion. Wherefore, having a technology that adapts to the internet quality of users is convenient for many people who cannot afford the highest quality of internet.

Lastly, another subcategory that was prominent in the thematic analysis was ‘personalized recommendations’. Here, the focus lied on depicting Netflix as a tech entertainment firm that recollects users viewing patterns to make relevant suggestions. It is important to note that this subcategory presented itself across all the years of the data analyzed for this thesis (2011-2021). One of Netflix’s main point of difference is their ability to make

informed decisions based on their database system (Wagman & Barra, 2016 as cited in Lobato, 2019). So, this is a fundamental part of their business model, which explains the reoccurrence of this theme throughout the years. Utilizing its database as a form of “symbolic repertoire” means that the company can make suggestions that are – as mentioned in the theoretical framework – based on platform activities, rather than the conventional demographic characteristics (Elkins, 2019). This is corroborated by the communications manager of Netflix LATAM, Mary Carmen Albarrán (19:2):

“El lugar de origen de una persona, sexo o rango de edad no impacta en los gustos de entretenimiento que alguien pueda tener, por esto los algoritmos de recomendación no se basan en estos factores. Se basan primordialmente en lo que ves, pero no quiere decir que si te gusta un solo género solo te va a recomendar ese tipo de programas”

[“A person’s place of origin, sex or age range does not impact their taste in entertainment, which is why the recommendation algorithms are not based on these factors. They are based, primarily, on what you watch. But it does not mean that if you favor a certain genre, that that is the only type of program that will be recommended to you”].

This granular and passive collection of user data is part of Netflix’s operations to build “taste clusters” (Elkins, 2019). For instance, “if someone likes Orange is The New Black and stand up comedy, we analyze what other things these people like and we start suggesting similar programs and every member’s decision feeds the algorithm to make more relevant suggestions based on their taste” (19:5). This is an elaborate branding approach to promote the innovative experience that Netflix can provide its users with, and which differentiates the platform from other platforms.

In short, this theme showed Netflix’s strategy at the beginning of its market entry. The strategy entailed the opposition of Netflix against traditional linear television in accordance to Wayne’s (2018) findings. This was highlighted by displaying the affordances of Netflix by invoking qualities of online television, such as availability on multiple devices, ease of use and personalized recommendations. Personalized recommendations, however, keeps emerging throughout the years as it is a core activity of Netflix’s business. All the strategies mentioned above mostly pertain to Netflix’s global strategy as they aimed to brand themselves as a “revolutionary” portal that can offer a wide content library to all of its users.

4.2. Accessibility

The current theme ‘Netflix accessibility’ entails information about the ability of the audience to get access to Netflix through conventional or other unconventional methods. The conventional method would be to sign up via Netflix itself, whereas the unconventional method would be to enter payment agreements through third-parties or access Netflix via the portal of a third party. Accordingly, this theme consists of the following subcategories: ‘cheap access price’, ‘limited free access to Netflix’, ‘alternative payment options’, and ‘Netflix subscription through suppliers’.

The first two subcategories ‘limited free access to Netflix’ and ‘cheap access price’, again, were most occurrent in the first year of Netflix’s presence in the Mexican market. The limited free access was a standard approach to entice users to use the platform, get to know it and subsequently, subscribe once they have experienced it. Reed Hastings noted that “everyone can try Netflix for free by going to Netflix.com” (16:4). In 2011, he said that Netflix currently “started with a free-trial period in Mexico, Central America and the Caribbean” (26:1). Free trial periods are usually a method that helps facilitate the distribution of a commercial product (Yi, Li, & Ma, 2019). So, the fact that Netflix offered their service free of charge for a limited period of time was a form of accruing brand awareness, which would eventually lead to brand equity.

The subcategory ‘cheap access price’, on the other hand, is a durable access where the user is paying to maintain a Netflix subscription. Ideally, this is the next step after the free-trial period. After mentioning the free-trial period, oftentimes what followed was the accentuation of their “low price” (4:1). Reed Hastings said: “we keep investing in content. Three years ago, we entered the Mexican market charging a subscription fee of 99 Mexican pesos. Now, three years later, we have so much more content and it only costs 89 Mexican pesos in standard definition” (2:3). Thus, Netflix’s promise to their market is that they provide the maximum content experience, whilst maintaining their services affordable to everyone. The promise of abundant content also comes back in the “Content” theme of this results section. Noteworthy is the fact that this narrative has been maintained throughout the years as Netflix increased its prices. In 2019, the price of the service was increased to 129 Mexican pesos (from 5 US dollars to 7 US dollars). In their communication about this price increase, the press manager at Netflix LATAM, mentioned that the price increase’s purpose “is to maintain the balance between improving the

service and keeping the prices accessible” [“es con el propósito de mantener un balance entre mejorar el servicio, al mismo tiempo que mantenemos nuestros precios accesibles”] (4:2). This shows that service quality, content and affordability are at the core of Netflix’s brand.

The two remaining subcategories ‘alternative payment methods’ and ‘Netflix subscription through suppliers’ pertain to the unconventional methods of subscription. To start with, ‘alternative payment methods’ were established by closing contractual relationships with telecommunication providers where users could “subscribe to Netflix, by paying through their monthly bill” (1:1a). One of the companies with which Netflix signed a contractual relationship with in 2017 was AT&T. Netflix’s motive for this alliance was that it would “benefit millions of consumers that will be able to subscribe to Netflix through their monthly AT&T bill. Thus, bringing another payment option to our subscribers as well as more control” (1:5a). This approach would make it possible for the Mexican audience without a credit card to still be able to subscribe to the platform and access the content easily. ‘Netflix subscription through suppliers’, on the other hand, entails that the Netflix portal would be accessible through a third-party portal. Such an agreement was made with Telefónica in 2018. In short, the official video promotion announced the multi-year partnership where “users could access Netflix content through [Telefónica’s] platform” (13:1) – Movistar Go. In that same video, Reed Hastings reassured the audience that “better Netflix is coming” (13:2). These partnerships, again, place Netflix’s service quality at the core of the brand. In regards to the nature of these partnerships, they are – in accordance with Lee and Griffith’s (2012) standards – relational weak ties. Both parties are mutually benefitting from the contractual relationship: Netflix becomes more accessible to the audience and the telecommunication providers utilize Netflix’s reputation and global brand to attract and maintain consumers to their services.

4.3. Content

Any statement or information that commented on the content on Netflix’s platform, whether it be about quality, quantity or its production was coded as part of the overarching ‘Content’ theme. The subcategories in this theme were ‘wide array of content’, ‘Netflix as content producer’, ‘quality content’, ‘storytelling’, ‘local originals’, and finally ‘local originals to global audience’.

In line with the branding of Netflix-as-portal strategy in the beginning of market entry in 2011 (see ‘Innovation’ theme), the platform was branded as a technological innovation that gave access to a ‘wide array of content’. Netflix’s narrative was that users could access “unlimited

movies and television series for only 99 Mexican pesos per month” (26:1). This directly ties in with the ‘cheap access price’ that was elaborated upon in the ‘Netflix accessibility’ theme. Accordingly, the value that Netflix provided to its audience, at the time, was abundance for a small price. While introducing the platform, Netflix representatives would reiterate that there is content for everyone. This is where the company also started utilizing the ‘portal-as-content’ strategy next to the ‘portal-as-brand’ strategy. The focus was not only on Netflix as a platform, but also on the diversity of (local) content. For instance, one representative said: “For example, if someone is an anime aficionado, we have a great range of programs from Japan of anime. If someone has a taste for documentaries, we have a lot of documentaries. It’s this type of stuff. It’s a species of “single casting” instead of broadcasting. So, the consumer can choose what (s)he wants, when (s)he wants. It’s not everything, but it’s a lot” (23:5). One phrase that was used repeatedly in Netflix’s presentation and introduction is that they have “thousands of hours of content” (24:5) on the platform, which resumes the abundance of content on the platform. Although, Netflix “shared a variety of content across all territories” that the firm is operating in, “there are some differences, because the markets are different” (23:1). So, these thousand hours also included a wide variety of Latin content: “For example, we have a lot of telenovelas produced by TV Azteca, Televisa, Televe, Telemundo, RCN, Caracol. A great assortment of some of the great favorites, such as *La Reina del Sur*” (23:2). Specifically for the Mexican audience, the Netflix representative stated that the platform contains a “wide variety of new movies and a great assortment of Mexican content, such as *El Chavo del ocho*, *El Santo* and *Cantinflas*. Even movies like *Nicotina*, *Amores perros* and a bunch of telenovelas from Televisa and TV Azteca. It’s a pretty impressive collection” [“Tenemos un gran surtido de películas mas nuevos y un gran surtido de contenido Mexicano. Desde *El Chavo del ocho* y *El Santo* y *Cantinflas* hasta películas como *Nicotina*, *Amores perros* y un montón de telenovelas de Televisa, y de Azteca. Es una colección bastante impresionante”] (25:1). In Tryon’s (2015) paper there was mention of Netflix’s borrowed approaches from traditional television to define the service as one of plenitude. From the statements in the paragraph above, Netflix’s offer of abundance became obvious. The platform was branded as a portal that contained a wide array of global content as well as local Mexican content. While this also has to do with the licensing agreements which differ per country, the fact that Netflix provided Mexican content increased the relevance and appeal of the platform to the local

audience. As it would turn out, Mexican shows like *Teresa* and *Rebelde* became the most watched content on Netflix in Latin America. Thus, including Mexico (Vargas, 2016). In turn, the streaming of Mexican content on the platform was a form of local articulation made possible through contractual licensing agreements with television giants in the Mexican television industry: Televisa and TV Azteca. This will further be elaborated upon in the ‘Local articulations’ theme.

While Netflix borrows from traditional television discourses, the media-tech firm also firmly places itself against linear television by promising new storytelling practices, and textual novelty (Tryon, 2015). These promises began to emerge in the data once Netflix started identifying itself as a producer of content in Mexico. Hence, the inclusion of the subcategory ‘Netflix as content producer’. In 2016, the firm produced its first Mexican content *Club de Cuervos*, which turned out to be a great success in Mexico. From this point onwards, Netflix started investing in content in the Mexican scene (this will be elaborated upon in the ‘Local articulations’ theme). In 2017, the firm announced an expansion in their Latin-American investment with Mexico as their first production hub. Reed Hastings said that Netflix is “investing a lot in a lot of countries, but [they] are particularly investing around 200 million US dollars to create content in Mexico’ (6:1b). Ted Sarandos also confirmed the previous statement by saying that Netflix is producing “quite a bit of original programming in Mexico” (44:2). The aim of such content production is because the firm aims to be “the best firm in the creation of television shows and movies” [“Lo que queremos es ser la mejor empresa en la creación de series y películas”] (6:2). What this data shows is that, with time, the media firm’s narrative of ‘portal-as-brand’ and ‘portal-as-content’ has shifted to ‘portal-as-producer’. Now, ‘quality content’, ‘storytelling’ and ‘local originals’ became the center of their self-promotion.

As a content producer, Netflix stressed the importance of ‘quality content’ to their strategy: “Our ambitious focus reflects our objective of satisfying the entertainment needs of our 158 million members and attracting as much of the millions of non-subscribers as we can. In order to accomplish this, we need a great amplitude of quality content” (21:1). This sentence reflects Netflix’s global expansion ambitions. The way that this is manifested in the Mexican scene is through their aim of creating content that will “redefine the boundaries of Latin American entertainment” (41:5). Mexican production shows, such as *Diablero* are “unique and of high quality” (41:5). This narrative of creating quality content, then, gradually flows into the

company's notion of 'storytelling'. Netflix's objective to redefine Latin American entertainment goes hand in hand with the breaking of "paradigms of what storytelling has traditionally looked like in Latin America" (41:4). Ted Sarandos says that Netflix's "local language shows that play around the world [do so] mostly because they are just great stories, and great shows and they're produced well and you want to see them" (44:3). In this case, "great storytelling" is, to some extent, one of Netflix's criterion for quality content. Netflix's aims to revolutionize storytelling in Mexico and other countries, only reiterates the firm's promises of new storytelling practices (Tryon, 2015). Remarkably enough, Netflix claims to have found a storytelling formula that works. Ted Sarandos said the following (8:10): "I think there is something that is deeply rooted in the way of storytelling in Mexico that has to do with telenovelas. It's a part of Mexican storytelling and the formula works." ["Creo que hay algo muy enterrado en la forma de contar historias en México que tiene influencia de esas telenovelas, es parte de la forma de contar historias de los mexicanos. Y la fórmula funciona"]. Based on this statement, one can deduce that the 'telenovela-formula' is working for the media-tech firm and they intend to keep producing these types of content. Remarkably enough, while Netflix is trying to revolutionize the Mexican entertainment industry (and that of LATAM) through unconventional storytelling, the firm utilizes the same 'telenovela' approach that traditional media corporations like Televisa and TV Azteca use. As mentioned in the theoretical framework, when TV Azteca was entering the market, their successful approach to internationalization was to tell stories that reflected the social realities in Mexico, e.g., by addressing drug smuggling, economic and social inequalities, corruption and so on (Gutiérrez Rentería, 2007). Consequently, the effectiveness of this storytelling approach is also to be found in Netflix's successful 'local originals'. Ted Sarandos further specifies (8:10):

"La Casa de las Flores ya se alista para una nueva temporada. *Ingobernable*, otro contenido señalado ampliamente de tener un 'tufio' telenovelesco sigue siendo un show ampliamente descargado y *Luis Miguel, la serie* fue un éxito absoluto en materia de audiencias e impacto cultural."

[*"La Casa de las Flores* is getting ready for a new season. *Ingobernable*, is another piece of content that has been signaled to have a telenovela 'feel' and is still downloaded widely. *Luis Miguel: la serie* was an absolute success in terms of audience and cultural impact."]

Judging by the paragraphs above, Netflix is solidifying its position as a content producer in the media landscape, including in the Mexican scene. The firm aims to keep producing content that is relevant for the audience. For instance, Hugo Sánchez – a character in *Club de Cuervos* – received its own spin-off show: “Hugo Sánchez is our first spinoff at Netflix. Because the character became very loved, the decision was taken to make this series” [“Al publico mexicano le gusta mucho el contenido local, *Club de Cuervos* se convirtió en una franquicia muy querida, incluso por eso Hugo Sánchez es nuestro primer spinoff en Netflix, al ser un personaje super querido se tomó la decisión de hacer la serie”] (19:6). By producing quality content based on great storytelling and relevant content, Netflix is further building its value – or consumer-based brand equity (Keller, 2010) – amongst the local audience.

The last subcategory that was found in this theme was ‘local originals to global audience’. When it comes to licensing, most of Netflix’s original productions are owned by Netflix itself, and can therefore be streamed anywhere in the world (“How does Netflix license TV shows and movies?”, n.d.). Possessing its own licensing rights helps the firm maintain a large catalogue from which the user can choose from. What appears from Netflix’s own statements is that Mexican shows have become a significant part of this global repertoire. Ted Sarandos said the following: “*La Casa de las Flores* is coming back for a second season in Mexico. It has had great success. What has also been great is that a lot of these titles that have a great impact in the country where they are produced, tend to travel throughout the whole region. Sometimes, even around the world” [“*La Casa de las Flores*, que regresará para una segunda temporada en México, ha tenido éxito tremendo. Lo que también ha sido genial es que muchos de estos títulos que tienen un gran impacto en el país donde se producen también tienden a viajar por toda la región, a veces alrededor del mundo”] (21:3).

In another interview, Ted reiterated the same thing by saying that Mexican stories “are very universal. They travel around the world and can be very very authentically Mexican”. Another representative similarly emphasized that the fact that Netflix operates on a global level “opens the doors to many countries that would not have seen a Mexican movie or series before” (18:4). He continues: “Our hope is that more and more people in Mexico, Latin America as well as the rest of the world will fall in love with these stories that we are producing, and that they see them as authentic Mexican stories, but which are made for the world” (18:4). In other words, Netflix is positioning itself as a content producer that aims to tell the ‘authentic Mexican story’

and who's objective is to bring this authenticity to the world. This formula works for the firm not only because of its success, but also due to the fact that Mexico was a strategic location that worked in advantage of the firm. Ted Sarandos said that producing in Mexico meant that the company could "produce local programming kind of close to home. So, our exposure to the market was better, to know the storytellers better, the producers better" (44:3).

Telling the 'authentic Mexican story' is a form of local articulation, which is the name of the next theme. While the 'Content' theme explained why content was localized and how Netflix positioned itself as a content producer in the Mexican market, the next section/theme explains how these local articulations were made possible. Ultimately, both themes are interconnected, and this will be elaborated upon in this next section.

4.4. Local articulations

The theme 'local articulations' entails any statement or information that indicates Netflix's adaptation to the local Mexican market. This would include local promotional activities, co-operation with local actors, such as producers, actors and so on. Based on this definition, the theme consists of the following subcategories: 'local providers of content', 'superficial localization strategies', and 'investing in local talent'.

To start in a chronological order, when Netflix officially launched in Latin America and Mexico, the media firm partnered with the main content producers and content exporters in Mexico, Televisa and TV Azteca (Gutiérrez Rentería, 2007; Vázquez-Maguirre & Hartmann, 2013). Partnering with 'local providers of content' became a strategic part of Netflix's branding in Mexico because it provided local content for consumers – as already discussed in the 'Content' theme. Amongst other international television providers, like Walt Disney Studios and Paramount studios, Reed Hastings mentioned that Netflix is obtaining "licensed content from Televisa and TV Azteca" to watch "television shows from past years or classic movies" (26:4). Televisa's communication indicated that both corporations signed a non-exclusive contract where "three thousand hours annually of telenovelas, series, and other general entertainment programming from its extensive library" would be added (5:1a). Although Netflix representatives did not say much about these relationships, Netflix's aim to provide local content explains the firm's intention behind these partnerships. The fact that these contracts were non-exclusive and in pursuit of mutual benefit proves that this was merely a relational partnership according to Lee and Griffith's (2012) standards. Netflix's contractual relationship with

both Televisa and TV Azteca ended in 2016. The reason was because both media companies started their own streaming services (Cornelio-Marí, 2020).

‘Superficial localization strategies’ was also a manifestation of local articulations in the data. This meant that Netflix would either dub or provide subtitles on their content. Mary Carmen Albarrán, communications manager Netflix LATAM, said that all “original Netflix series are released on the same day, at the same time, subtitled in 26 different languages. So, it is no longer a barrier for anyone to consume content and we are of the idea that you do not have to be from the country to like the content. This opens up the possibilities enormously” [“Las series originales de Netflix se reciben al mismo tiempo, el mismo día, subtitulados en 26 idiomas y no es una barrera para nadie ya consumir el contenido y si nos basamos en que no tienes que ser del país para que te guste un contenido, pues eso abre las posibilidades enormemente”] (19:4).

Thus, Netflix is branding their platform as a place where the local and cultural barriers do not exist, because anyone in the world can watch content either dubbed or subtitled in their own language. Ted Sarandos reiterates this point: “People want to watch [Netflix’s local originals] and they use Netflix for what they should be using it for which is to solve the language barrier with technology and subtitling and dubbing in a way that people can really watch the same shows with the same level of passion” (44:4). The Netflix representatives both underlined Netflix’s efforts in bridging these cultural disparities on a global level. The inclusion of the local language in the form of subtitles is a form of localization, according to Alden et al. (1999). Seeing that this form of localization is a global approach, Mexico is included by default. The advantage with Mexico and other Latin American countries is that they are, for the most part, Spanish-speaking countries (Lobato, 2019). This makes subtitling and dubbing relatively easy in the region.

Another subcategory ‘investment in local talent’ started emerging in the data once Netflix started its content production in Mexico in 2016, and hence started investing as a content producer. For this reason, this subcategory is closely connected to the ‘Content’ theme. The results from data analysis show that Netflix started showing increased interest in investing in local production in Mexico because they delivered good numbers: their first show *Club de Cuervos* was a success in the country. Netflix discovered that “the Mexican public likes local content” (19:6). From that point onwards, Netflix started an aggressive roll-out in Mexico where

they would collaborate with local actors, producers and agencies. Mary Carmen Albarrán said the following statement (19:2):

“Latinoamérica, es un terreno fértil los creadores de aquí tienen una voz muy distinta y queremos continuar invirtiendo en estos narradores locales que expanden el rango de historias que se crean en la región y al darles esta libertad creativa están haciendo cosas muy interesantes”

[“Latin America is a fertile ground. The creators from here have a voice that is very distinct and we want to continue investing in local narrators that expand the range of stories that are created in the region. By giving them this creative freedom, they are doing very interesting stuff.”

Ted Sarandos further explained that “if you pick the right people and give them the resources to make their content, all the resources are in Mexico. The production infrastructure, the writers, incredible acting talent. So, [Netflix] has found it continuous to scale and scale and scale, and [Netflix is] producing quite a bit of original programming in Mexico” (44:4).

Netflix’s investment in local talent positions the brand, not only as an entertainment platform, but also as a potential employer for directors, writers and other local talents. Naturally, more investment in local Mexican content, also implies more local content that Mexican Netflix users will enjoy. By branding itself as a local content producer and local content provider, Netflix is purposefully creating favorable associations with its brand, which further build brand equity (Keller, 2010). Seeing that brand equity can help consumers’ choice-making, Netflix’s continuous involvement in building brand equity allows the platform to be favored against other competitors.

4.5. The Netflix experience

This theme revolves around the consumer. It concerns all statements and information that mention or explicate the social experience which results from using and consuming content on the platform. This theme consists of the following subcategories: ‘binge-watching on Netflix’, ‘Netflix cheating’, and ‘family consumption’.

‘Binge-watching on Netflix’ has always been an inherent asset of the streaming platform. From the beginning, Netflix marketed itself as a portal where users can watch content “as much as they want” (16:3). Users can freely select from a “never-ending” catalogue what they want to watch next. What’s more, Netflix supports this bingeing activity by providing a recommendation that

will start playing ten seconds after the user has finished a TV show or a movie. Ted Sarandos and Todd Yelling – VP of products at Netflix – filmed a promotional Q&A video where a fan asked how he can stop watching Netflix since he is always distracted by Netflix’s “ten-second rule”. Todd Yelling jokingly replied that if the user sees “Netflix as a productive activity, [...] then you’re productive. Let it keep playing and playing after ten seconds” (33:3). Further, they also commented in a joking manner that there are a lot of things that someone can do in ten seconds: “you can take on a whole new hobby. You can learn to speak another language, ten seconds at a time”. Although the promotional video was lighthearted in nature, it does not take away from the message that the Netflix representatives want to bring forth: it is okay to binge-watch content. So, what the recommending system does is that it suggests as much relevant content as possible in order to keep the user attached to their monitors and spending time on the platform. That time spent on the platform will then again feed the algorithmic system to create a better picture of a specific “taste cluster” as was written about in the “Innovation” section. In turn, this also positions culturally informed spectatorship at the heart of Netflix’s brand (Pilipets, 2019).

Another subcategory that has emerged from the data in the last five years, is the new concept of “Netflix cheating” or “modern cheating”. According to Mary Carmen Albarrán – communications manager at Netflix LATAM – it happens when “someone cannot wait for their ‘buddy’ to watch the next chapter and gets carried away by their curiosity to know what is going to happen next” [“... se declara culpable al no poder esperar a su “compañero de serie” para ver el siguiente capítulo y dejarse llevar ante la imperiosa necesidad de adelantarse para saber qué sucederá”] (19:8). This form of “modern cheating” is enabled by Netflix’s inherent affordances, such as instant access and the “ten-second rule”. What “Netflix cheating” also makes clear is that Netflix has become an activity in people’s social lives which they share with their significant others. It has become some sort of compromise, that if faltered is somewhat comparable to what cheating signifies in a relationship. Since the concept has surfaced, Netflix has made several promotional videos following the narrative. For instance, the firm released a “how-to” video on how to avoid the user’s partner from knowing that they have already watched the episode (34:1).

Netflix has also managed to become a social activity for families – ‘family consumption’. The communications manager for Netflix LATAM says the following (19:9):

“Particularmente en Latinoamérica que es un país allegado a la familia, hay contenido que se están sentando a ver juntos, ya no es como éstas son mis series y estas son las de mis hijos. También hay otras que generan un acercamiento entre generaciones, los papás se sienten más abiertos a hablar de temas difíciles porque hay contenidos que les ayuda a hacer ese puente”

[“Latin America, in particular, is a country that is very close to the family. There’s content that everyone is watching together. It’s not like “these are my series, and these are my children’s series” anymore. There’s also content that create a rapprochement between generations: parents feel more open to talk about certain difficult topics, because there’s content that helps them bridge the gap”].

How Netflix is purporting this family experience is by creating content “that is for everyone” (35:1). A promotional video that the media-tech firm released in 2015, contained this text: “Todas las familias tienen un romántico, un agente secreto, un pequeño travieso, un rebelde y un lugar con algo para todos. Todos tenemos una historia” [“Every family has a romantic, a secret agent, a playful little one, a rebel and a place with something for everyone. We all have a story”] (35:2). The attention-grabbing commercial shows that Netflix has a variety of content that can appeal to everyone in the family because its content is also family-friendly. This ties in with Netflix’s ‘wide array of content’ as mentioned in the “Content” theme. The promotional video alludes to the fact that although each individual in the family is different, there is always a story that brings them together, and that story can be found on Netflix. This, further positions Netflix’s brand as one that is family-friendly seeing that there is content available for everyone to watch individually or collectively.

4.6. Competitors

This last theme refers to any communication that addresses Netflix’s competition in the Mexican media landscape, whether it be legal or illegal. The theme helps to understand how Netflix’s branding approaches are shaped to maintain a clear distinction from other competitors, such as linear television and local streaming services. Although this theme did not present itself regularly in the data analyzed in this thesis, it is still important to see the context in which the competition is portrayed. Even more important is the absence or the lack of urgency in analyzing the competition, which implicitly indicated Netflix’s comfortable first-mover position in the

Mexican market. This theme consists of three subcategories: ‘different from traditional TV’, ‘Netflix counters piracy’ and ‘other entertainment platforms’.

Netflix’s distinction from linear television was mentioned in the ‘Innovation’ and ‘Content’ themes. When it comes to their innovative qualities, Netflix branded itself as a portal that gives on-demand access to content and which utilizes advanced algorithmic systems that appeal to each user’s taste. Content-wise, the company promises a wide array of quality content for everybody around the world. Accordingly, the former vice-president of global corporate communications used their wide array of content to differentiate the platform from linear television while introducing Netflix to the Mexican press in 2011 (25:11):

“Yo creo que es una gran oportunidad para que la gente pueda disfrutar cosas que nunca llegan aquí a América Latina o en México. Tenemos contenidos de todos lados: de anime, de Japón, de series como *Battlestar Galactica*, de *Madmen*, *Weeds*. Muchas películas clásicas y también muchas películas de todas partes del mundo. Lo bueno de Netflix es que cada persona puede encontrar algo bueno para ellos. Así mismo. Y ese es la gran diferencia entre lo que es Netflix y lo que es televisión tradicional”

[“I think that it is a great opportunity for people to enjoy things that would never get released here in Latin America or Mexico. We have content from everywhere: anime, Japan, series like *Battlestar Galactica*, *Madmen*, *Weeds*. A lot of classic movies and a lot of movies from all over the world. The good thing about Netflix is that every person can find something that is good for them. That’s the big difference between Netflix and traditional television”].

At this point in time (2011), telenovelas were the main local products that were being created, transmitted and exported by Televisa and TV Azteca (Salinas, 1997). Wherefore, global content was lacking. Netflix, then, used their content as leverage. Even though Netflix was not a content producer yet, they did have a global repertoire to market to the audience. By marketing its variety of content, Netflix was creating positive brand associations. Another step towards building brand equity (Keller, 2010).

Another subcategory that was found in the data was ‘Netflix counters piracy’. This subcategory only emerged in 2011, when Netflix recently entered the Mexican market. Piracy, at the time, was an issue of global concern as peer-to-peer torrent transactions enabled users to download content that they would otherwise pay for, for free (Cenite, Wanzheng, Chong, &

Shimin, 2009). Without exception, Latin America (including Mexico) was one of the regions where torrenting was at its peak (Chirinos, 2011). For those who were concerned that Netflix would purport piracy, Friedland highlighted that it is not possible because “when someone is streaming, you are not downloading anything, you are simply watching the content from a server. So, there is no way for someone to copy it.” [“Eso es imposible porque cuando haces streaming no estás bajando nada, estás viendo el contenido desde un servidor. Así que no hay manera de que alguien lo copie”] (6:4). So, Netflix would not sustain torrenting practices.

Reed Hastings also acknowledged piracy, yet he sustained that Netflix would be a better option (26:5): “ellos ven la piratería como agua gratis que pueden beber cuando quieran, aún así hay gente que va a comprar agua embotellada porque es más higiénica o porque les gusta más, así es Netflix.” [“They (the youth) see piracy as free water that they can drink whenever they want. Even so, there are people who’d rather buy bottled water because it is more hygienic or because they like it more. That’s Netflix”]. It is clear that Reed Hastings did not see the rampant piracy in Latin American countries as a threat to his business. Rather, he considered the people who would rather consume content legally. So, Netflix was branded as the platform where users could consume content legally by paying a small fee each month.

The last subcategory found in this theme is ‘other entertainment platforms’. This subcategory is notorious because, from what is seen in the data, Netflix is not intimidated by their direct competitors. In fact, Reed Hastings addressed the fact that a lot of people consider the competition between platforms as a “streaming war”, yet Netflix has been competing with other platforms like YouTube, Amazon and Hulu for over a decade (Martínez, 2021). He does acknowledge that “competition is increasing with Disney+, Apple TV+ and HBO Max”. Nonetheless, he also says that they – Netflix included – are all still “small in comparison to linear television” (21:8). In another interview, Ted Sarandos said that the reason that Netflix has started to create original content was because they believed that “studios and networks were going to, at some point, want to start their own direct-to-consumer services and not want to sell [Netflix] their content” (44:7).

What this shows is that despite the other entertainment platforms that are positioning themselves in the Mexican market, Netflix considers traditional linear television as a more relevant competitor. This might be because of the Internet infrastructure in Mexico. As mentioned in the theoretical framework, Mexico’s internet distribution shows a digital divide

which reflects the social inequalities in the country (Mecinas Montiel, 2016). Internet distribution is happening at a faster pace in urban areas than in rural ones (Martínez-Domínguez & Mora-Rivera, 2019). Wherefore, citizens still use linear television rather than paying for Netflix – an Internet-based service that they cannot enjoy. In addition, as Ted Sarandos indicated, both Televisa and TV Azteca would initiate their own direct-to-consumer platforms, which meant that they stopped providing their original content to Netflix. The fact that Netflix's branding strategies are less directed towards local streaming platforms show their commodified position in the Mexican market. The media-tech firm is also an alternative to illegal viewing practices, which makes it more enticing to its audience.

Conclusion

This chapter yielded the results of the systematic process of thematic coding. It discussed the six main themes that emerged from the data. These were: 'Innovation', 'Netflix accessibility', 'Content', 'Local articulations', 'The Netflix experience', and 'Competitors'. Each section was discussed in light of the subcategories and the relations between these subcategories and themes in order to create a panorama of Netflix's branding strategies in Mexico. The results revealed that Netflix's strategy changed throughout the years: while the media firm employed a portal-as-brand strategy and portal-as-content strategy in the beginning of their market entry in Mexico, the narrative changed once Netflix started identifying as a producer of content in the Mexican scene. To begin with, Netflix's portal-as-brand strategy entailed that the firm would emphasize its innovative affordances, such as 'ease of use', 'availability on multiple devices' and 'personalized recommendations'. Qualities which starkly positioned the platform as a better form of television. Netflix also made its services easily accessible by providing limited-time free-trials and closing contractual relationships with telecom providers so that users could pay through their pay TV subscriptions. This made it relatively easy for users to access the platform without having a credit card. One thing that Netflix also emphasized repeatedly, in the beginning, was its abundance of content that was accessible via the portal for a cheap price. Their argumentation was that the local audience can enjoy a diverse selection of genres and international content, but also local content – such as telenovelas and local television series. This was only possible due to Netflix's partnerships with Televisa and TV Azteca, which enabled the platform to brand the content instead of their service – Wayne's (2020) 'portal-as-content' strategy. So, the core of Netflix's strategy relied on its promises of service quality, content and affordability.

Later, when Netflix began producing content in Mexico in 2016, the firm's content producing activities became a main focus in the local scene. The data shows that Mexico has become a strategic production hub for Netflix and hence, has increased in importance for the corporation. Netflix has positioned itself as a storyteller that wants to tell the 'authentic Mexican story' to the world. These stories are then created by Mexico, for Mexico and then for the world to see. So, Netflix is creating opportunities for filmmakers and producers in the Mexican scene, which validates Ramasoota and Kitikamdhorn's (2021) assessment of the 'Netflix effect' in national markets. Further, Netflix has also become a social experience. More than a platform where users can watch content, watching Netflix has become a social activity for couples and families. By endorsing concepts like 'Netflix cheating' and 'content for everyone', Netflix has positioned itself in the lives of its audience as an activity to spend quality time with loved ones. Lastly, the theme 'competition' was also discussed and revealed that Netflix is not threatened by other SVOD incumbents. Rather, conditions in Mexico – such as social inequality which inhibit Internet penetration in rural areas – make traditional linear television Netflix's main competitors in the Mexican entertainment industry. Wherefore, Netflix's branding is less geared towards working with traditional Mexican television and more about creating content that appeals to the local Mexican audience, but also other international Spanish-speaking audiences.

5. Conclusion & Discussion

This thesis was interested in examining Netflix's branding strategies in terms of their global and local articulations in the Mexican media landscape. To further analyze and understand these articulations, these research questions were posed: *What are Netflix's brand strategies in Mexico? What local articulations are to be found within Netflix's overarching global branding strategy?* From a qualitative viewpoint, this thesis analyzed press releases, trade press coverage, news articles, Netflix blogs, (audio)visual content, official corporate documents and promotional videos that reflected Netflix's branding strategies in Mexico. The thematic content analysis yielded results that are somewhat in line with contemporary literature which have investigated Netflix's operations and strategies, such as Wayne's (2018) portal-as-brand strategy and portal-as-content strategy as well as Elkins' (2019) notion of Netflix's positioning as a catalyst of a cosmopolitan and global society.

The answer to the main research question regarding Netflix's branding strategies in Mexico was found by comparing the data which emerged from this research to the contemporary literature discussed in the theoretical framework. Naturally, by discussing the main research question, the sub research question will also be answered. To start with, Netflix's branding strategy in Mexico has evolved with the firm throughout the years. While the data revealed expected findings in regards to Netflix's portal-as-brand strategy and portal-as-content strategy, a new pattern emerged that positioned Netflix as a content producer. How this is reflected in the findings is as follows. In the beginning of Netflix's market entrance in Mexico in 2011, the firm utilized a portal-as-brand strategy (Wayne, 2018) where innovation and accessibility seemed to be the core of its branding. These pertain to the firm's global articulations of innovative technology which includes the firm's leveraging of consumer data and viewing patterns to make informed recommendations (Varadarajan, Yadav, & Shankar, 2008). This portal-as-brand strategy was used to highlight the differences between Netflix and traditional linear television that made the service superior to its counterpart. It is within these global articulations, however, that there are local adaptations to the Mexican market.

Although Netflix positioned itself as a better form of television in a general context, the firm provided the Mexican audience with local content by partnering with Mexico's most prominent linear television providers – TV Azteca and Televisa. So, in a national context, Netflix's initial portal-as-brand strategy was not to discredit the Mexican linear television

companies, but to create partnerships with them. They provided the content, and Netflix was the distributor. This is also where Wayne's (2018) portal-as-content strategy emerges. Partnering with local content providers allowed Netflix to bring relevant content to the Mexican audience – which is a form of localization. By positioning Netflix as a portal where users had unlimited access to global content as well as telenovelas and other Mexican movies and series, the global brand managed to bring value – or brand equity – to the Mexican audience.

Especially in Mexico, telenovela's are a big form of storytelling and the firm has noticed this. After gaining brand equity in the Mexican market, the firm started investing in the local market – from 2016 onwards – and started positioning itself as a content producer. Remarkably enough, Netflix's approach was similar to that of TV Azteca when the state-owned commercial channel first started its operations and started competing with industry giant Televisa. Netflix utilizes the 'telenovela formula' that shows Mexico's social realities because the formula works. This is not so different from Tryon's (2015) perspective: while trying to distinguish itself from traditional linear television, Netflix still borrows from traditional television's strategies. Although the media tech firm borrows from traditional practices, Netflix's 'portal-as-producer' strategy shows the firm's ability to act as a local producer, but also as a global distributor. Not only does Netflix want to create Mexican content, but they want to bring these 'authentic Mexican stories' to the world.

Besides telling the Mexican story, Netflix also aims to revolutionize and positively support the Mexican media landscape. Netflix's main local articulations are manifested in the firm's positioning as a content producer in Mexico. As discussed in the theoretical framework, Netflix gives a platform to local Thai talent by integrating them in the Netflix platform and investing into their small projects (Ramasoota & Kitikamdhorn, 2021). Similarly, the firm uses a similar approach to help small independent directors and local actors in Mexico. Netflix is increasingly investing in Mexico, making the country a valuable production hub for the firm. These local productions are then streamed on the global platform, which means that Netflix's local articulations in Mexico also become part of their global strategy to provide users worldwide with content. By telling foreign stories on a global service, the company is breaking cultural boundaries. Thus, purporting cosmopolitanism and globality (Elkins, 2019).

Ultimately, Netflix's branding articulations are interconnected as the global leads to the local, but the local also leads to the global. Their branding strategies show a synergy where there

is a consistent adherence to global branding strategies, which are then adapted to fit the national market. The fact that Netflix's local articulations are consistent in different foreign markets indicates that their strategy of partnering with local actors and producing local content is working. This is then reflected in Netflix's brand equity on both scales. Further, Mexico's significance to Netflix's production operations is becoming increasingly important. While this research has analyzed content from early 2021, it is imperative that future research maintains a close eye on the developments in Mexico. Seeing that the firm has announced its new headquarters in Mexico and its investment in fifty new projects (Hernández & Aguilar, 2021), the country becomes a suitable study object.

When it comes to practical matters, this study is not exempt of limitations. The employment of a partly inductive qualitative method means that there is a measure of subjectivity involved in presenting the results of this study. Other researchers could interpret the data differently, which would mean that there is less reliability in the results. What is more, the items in this study were selected based on their relevance to the research question. While there were more items to be analyzed, time-restriction did not allow for further analysis. Hence, in this case, saturation has not been reached. Further research is advised to analyze more data spread evenly throughout the ten-year period that Netflix has been present in the Mexican market.

Since Netflix and video-on-demand services are relatively new phenomena, comparative research between the different platforms are lacking. The Mexican television landscape is experiencing a rise in SVOD platforms from tech companies, but also from media giants, like Televisa. Hence, further research is also suggested to delve deeper into these platforms' branding strategies and compare the approaches. Wayne (2020) denoted in his work that there is often a lack of vocabulary for when streaming platforms operate and cooperate on a national/local level. With this thesis, I would like to make the same point: the academic field still lacks the vocabulary to make sense of new discourses that are emerging when it comes to online television branding practices. Although these practices are context-dependent, there are still some similarities in the approaches. Based on these similarities, researchers could develop new branding theories that fit the new online and globalized environment that television companies and media entertainment companies are operating in.

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Appendix A

Initial coding frame (eight articles)

Category	Subcategory	Units of analysis	Illustrative quote
Innovation	Availability on multiple devices	<p>Item 1 1:6</p> <p>Item 2 2:1</p> <p>Item 5 5:3</p>	<p>“Hemos puesto más enfoque en nuevas plataformas también, como en los televisores, los celulares Android, Apple TV y antes que termine el año, el servicio también estará en dispositivos de Apple y en el Xbox 360 de Microsoft”</p> <p>Translation: “we have placed more focus on new platforms too. Like television sets, Android phones, Apple TV, and before the end of the year, the service will also be available on Apple devices and Microsoft’s Xbox 360. ”</p>
	Innovative technology	<p>Item 2 2:2</p>	<p>“Nosotros estamos enfocados en la televisión por internet y en hacer nuestro contenido cada vez mejor. Somos una compañía que se dedica exclusivamente a hacer videos por internet en todo el mundo”</p> <p>Translation: “we are focused on providing television via internet and making improvements to our content.</p>

			We are a company that is exclusively dedicated to delivering videos via internet throughout the whole world”
Content	Quality content	Item 2 2:10 Item 6 6:1	<p>“Quizás sea más difícil para nosotros pues nos obliga a luchas más para tener mejores contenidos a precios más bajos.”</p> <p>Translation: “It might be harder for us, but it obliges us to fight for better content at low prices”</p>
	Instant content provider	Item 4 4:1	“ We are proud to bring them the Netflix experience of instantly enjoying as many movies and TV shows as they want, when they want”
	Binge-watching on Netflix	Item 2 2:15 Item 6 6:1	<p>“Puedes ver una hora a la semana si estás muy ocupado o bien puede elegir ver 3 horas al día. No publicaremos el promedio de horas que los usuarios destinan a ver Netflix”</p> <p>Translation: “You can watch one hour a week if you are busy or you can also watch three hours a day. We will not make the users’ average time spent watching Netflix public”</p>

	Global content appeal	Item 2 2:13	<p>“Por ejemplo Orange is the New Black ha permeado en muchas culturas distintas.”</p> <p>Translation: “For example, Orange is the New Black has permeated a lot of different cultures”</p>
	Wide array of content	Item 2 2:3 Item 4 4:2 Item 7 7:1 Item 8 8:7	<p>“Es por eso que seguimos expandiendo la oferta más allá de las series dramáticas para incursionar en comedias, aventura, documentales, acción e incluso realities.”</p> <p>Translation: “That is why we continue to expand the offer beyond dramatic series to venture into comedies, adventure, documentaries, action and even reality shows.”</p>
Netflix accessibility	Alternative payment options	Item 1 1:1 1:2 1:4 1:5 Item 2 2:7	<p>“Esto aumenta y facilita las opciones de pago para disfrutar del contenido de Netflix, incluso para aquellos clientes que no cuentan con una tarjeta de crédito.”</p> <p>Translation: “This increases and facilitates the options of payment to enjoy content through Netflix, including for those who do not own a credit card.”</p>

	Netflix subscription through suppliers	<p>Item 1 1:3</p> <p>Item 2 2:12</p>	<p>“Los clientes podrán suscribirse a Netflix, pagando por medio de AT&T Conecta, el nuevo portafolio de entretenimiento de AT&T en México.”</p> <p>Translation: “Clients can subscribe to Netflix, by paying through AT&T Conecta. AT&T’s new entertainment portfolio in Mexico”</p>
	Cheap access price	<p>Item 2 2:3 2:10</p> <p>Item 4 4:1</p>	<p>“ We are proud to bring them the Netflix experience of instantly enjoying as many movies and TV shows as they want, when they want for one low price.”</p>
Local articulations	Superficial localization strategies	<p>Item 5 5:8</p>	<p>“Que la compañía planea enfocarse es en presentar su contenido en su idioma original y subtítulos en español o en portugués, dependiendo del mercado dirigido.”</p> <p>Translation: “The company plans on focusing on presenting its content in their original language with subtitles in Spanish or English, depending on the target market.”</p>
	Local content for consumers	<p>Item 3 3:3 3:5</p> <p>Item 8</p>	<p>“Todos estos títulos son de México para México y para el mundo”</p>

		8:8	Translation: “All these titles are from Mexico, for Mexico and for the world”
	Investing in local talent	Item 3 3:2 3:4 3:6 3:6 3:7 3:8 Item 7 7:1 7:2 Item 8 8:1 8:2	“ Desde entonces, hemos continuado expandiendo la inversión local y brindando una plataforma para el reconocimiento del talento mexicano en todo el mundo.” Translation: “From then on, we have continued to expand local investments and providing a platform for the recognition of Mexican talent all around the world.”
	Local producer	Item 3 3:7	“El talento mexicano fue clave para nuestra decisión de poner en marcha nuestra estrategia de producción con <i>Club de Cuervos</i> cuatro años atrás.” Translation: “The Mexican talent was key to our decision to start with our production strategy for <i>Club de Cuervos</i> four years ago.”

Appendix B
Final coding frame

Category	Subcategory	Units of analysis	Illustrative quotes
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Innovation	Innovative technology	<p>Item 4b 4:1b</p> <p>Item 16 16:1</p> <p>Item 19 19:7</p> <p>Item 24 24:7</p> <p>Item 44 44:1</p>	<p>"Surgen innovaciones como las descargas para ver contenidos sin necesidad de internet e igual la cantidad de dispositivos en los que la gente puede ver contenido es enorme porque siempre se están haciendo mejoras para que el usuario tenga la mejor experiencia al momento de dar play y que nada falle".</p> <p>Translation: "There are innovations such as downloading to watch content without Internet and the amount of devices on which the users can watch content is always increasing, because we are always making improvements so that the user can have the best experience when (s)he presses play"</p>
	Availability on multiple devices	<p>Item 22 22:1 22:3</p> <p>Item 24 24:6</p> <p>Item 25 25:8</p> <p>Item 26 26:3</p>	<p>"Las películas se pueden ver a través de dispositivos con internet como computadoras, consolas de videojuego como Sony PS3, Nintendo Wii, Microsoft Xbox y Smart TV y tardan en cargar en promedio 10 segundos."</p> <p>Translation: "Users can watch movies on different devices with Internet, like computers, gaming consoles like Sony's PS3, Nintendo Wii, Microsoft Xbox and Smart TV and it only takes ten seconds to load on average."</p>
	Ease of use	<p>Item 22 22:1</p> <p>Item 24 24:1</p>	<p>"You just click and play the movie. It's so easy"</p>

	Personalized recommendations	<p>Item 19 19:2</p> <p>Item 24 24:2 24:3</p>	<p>"El lugar de origen de una persona, sexo o rango de edad no impacta en los gustos de entretenimiento que alguien pueda tener, por esto los algoritmos de recomendación no se basan en estos factores. Se basan primordialmente en lo que ves, pero no quiere decir que si te gusta un solo género solo te va a recomendar ese tipo de programas."</p> <p>Translation: "A person's place of origin, sex or age range does not impact their taste in entertainment, which is why the recommendation algorithms are not based on these factors. They are based, primarily, on what you watch. But it does not mean that if you favor a certain genre, that that is the only type of program that will be recommended to you"</p>
Netflix availability	Cheap access price	<p>Item 16 16:3</p> <p>Item 26 26:2</p>	<p>"El precio es muy bajo"</p> <p>Translation: "The price is really low"</p>
	Limited free-access to Netflix	<p>Item 16 16:4</p> <p>Item 22 22:1</p> <p>Item 25 25:1 25:5</p> <p>Item 26 26:1</p>	<p>"Actualmente arrancamos en México, América Central y el Caribe con un periodo de prueba de un mes en la página www.netflix.com"</p> <p>Translation: "We have currently started in Mexico, Central America and the Caribbean with a free trial period of one month on our webpage www.netflix.com"</p>

	Alternative payment methods	<p>Item 1a 1:1a 1:2a 1:4a 1:5a</p> <p>Item 2a 2:7a</p> <p>Item 7 7:1</p> <p>Item 9 9:3</p>	<p>“Esto aumenta y facilita las opciones de pago para disfrutar del contenido de Netflix, incluso para aquellos clientes que no cuentan con una tarjeta de crédito.”</p> <p>Translation: “This increases and facilitates the options of payment to enjoy content through Netflix, including for those who do not own a credit card.”</p>
	Netflix subscription through suppliers	<p>Item 1a 1:3a</p> <p>Item 2a 2:12a</p> <p>Item 9 9:2</p>	<p>“Los clientes podrán suscribirse a Netflix, pagando por medio de AT&T Conecta, el nuevo portafolio de entretenimiento de AT&T en México.”</p> <p>Translation: “Clients can subscribe to Netflix, by paying through AT&T Conecta. AT&T’s new entertainment portfolio in Mexico”</p>
Content	Wide array of content	<p>Item 2a 2:3a</p> <p>Item 4a 4:2</p> <p>Item 5 5:1 5:2</p> <p>Item 7a 7:1a</p> <p>Item 7b 7:2b</p> <p>Item 8a</p>	<p>“Es por eso que seguimos expandiendo la oferta más allá de las series dramáticas para incursionar en comedias, aventura, documentales, acción e incluso realities.”</p> <p>Translation: “That is why we continue to expand the offer beyond dramatic series to venture into comedies, adventure, documentaries, action and even reality shows.”</p>

		8:7a Item 14 14:2 Item 16 16:3 Item 23 23:1 23:5 Item 36 36:1	
	Quality content	Item 2a 2:10a Item 6a 6:1a Item 8b 8:13b 8:14b Item 19 19:12 Item 21 21:1 Item 41 41:5 Item 44 44:8	“It’s also why a unique and high quality story like <i>Diablero</i> feels so compelling.”
	Storytelling	Item 41 41:4 Item 42 42:1 42:2 Item 44	“Local creatives are breaking the paradigms of what storytelling has traditionally looked like in Latin America”

		44:3 44:5 44:8	
	Local originals	Item 44 44:5 Item 8b 8:10b	<p>“<i>La Casa de las Flores</i> ya se alista para una nueva temporada. <i>Ingovernable</i>, otro contenido señalado ampliamente de tener un 'tufo' telenovelesco sigue siendo un show ampliamente descargado y <i>Luis Miguel, la serie</i> fue un éxito absoluto en materia de audiencias e impacto cultural”</p> <p>Translation: “<i>La Casa de las Flores</i> is getting ready for a new season. <i>Ingovernable</i>, is another piece of content that has been signalled to have a telenovela ‘feel’ and is still downloaded widely. <i>Luis Miguel: la serie</i> was an absolute success in terms of audience and cultural impact.”</p>
	Local originals to global audience	Item 2a 2:6 Item 8b 8:1b 8:2b Item 20 20:2 Item 21 21:3 Item 41 41:1	<p>“<i>La Casa de las Flores</i>, que regresará para una segunda temporada en México, ha tenido éxito tremendo. Lo que también ha sido genial es que muchos de estos títulos que tienen un gran impacto en el país donde se producen también tienden a viajar por toda la región, a veces alrededor del mundo.”</p> <p>Translation: “<i>La Casa de las Flores</i> is coming back for a second season in Mexico. It has had great success. What has also been great is that a</p>

		Item 42 42:2	lot of these titles that have a great impact in the country where they are produced, tend to travel throughout the whole region. Sometimes, even around the world.”
Local articulations	Local providers of content	Item 1b 1:2 1:3 Item 5b 5:1	“Televisa will make available to Netflix on a non-exclusive basis around three thousand hours annually of novelas, series, and other general entertainment programming from its extensive library.”
	Superficial localization strategies	Item 5a 5:8a Item 19 19:4	<p>“La compañía planea enfocarse es en presentar su contenido en su idioma original y subtítulos en español o en portugués, dependiendo del mercado dirigido”</p> <p>Translation: “The company is planning on focusing on presenting its content in its original language with subtitles in Spanish or Portuguese, depending on the target market.”</p>
	Investing in local talent	Item 3a 3:2a 3:4a 3:6a 3:6a 3:7a 3:8a Item 7a 7:1a 7:2a Item 8a 8:1a 8:2a	<p>“Desde entonces, hemos continuado expandiendo la inversión local y brindando una plataforma para el reconocimiento del talento mexicano en todo el mundo.”</p> <p>Translation: “From then on, we have continued to expand local investments and providing a platform for the recognition of Mexican talent all around the world.”</p>

		<p>Item 8b 8:4b 8:6b</p> <p>Item 41 41:2 41:5</p>	
The Netflix experience	Binge-watching on Netflix	<p>Item 2a 2:15a</p> <p>Item 6a 6:1a</p> <p>Item 21 21:5</p> <p>Item 33 33:1 33:3</p>	“[users] can watch as much as they want”
	Family consumption	<p>Item 19 19:9</p>	<p>“Particularmente en Latinoamérica que es un país allegado a al familia, hay contenido que se están sentando a ver juntos, ya no es como éstas son mis series y estas son las de mis hijos.</p> <p>También hay otras que generan un acercamiento entre generaciones, los papás se sienten más abiertos a hablar de temas difíciles porque hay contenidos que les ayuda a hacer ese puente”</p> <p>Translation: “Latin America, in particular, is a country that is very close to the family. There’s content that everyone is watching together. It’s not like “these are my series, and these are my children’s series” anymore. There’s also content that create a rapprochement between generations:</p>

			parents feel more open to talk about certain difficult topics, because there’s content that helps them bridge the gap”]
	Netflix cheating	<p>Item 19 19:8</p> <p>Item 28 28:1</p> <p>Item 36 36:1</p>	<p>“... se declara culpable al no poder esperar a su “compañero de serie” para ver el siguiente capítulo y dejarse llevar ante la imperiosa necesidad de adelantarse para saber qué sucederá”</p> <p>Translation: “[Netflix cheating happens when] someone cannot wait for their ‘buddy’ to watch the next chapter and gets carried away by their curiosity to know what is going to happen next”</p>
Competitors	Different from traditional TV	<p>Item 25 25:11</p>	<p>““Yo creo que es una gran oportunidad para que la gente pueda disfrutar cosas que nunca llegan aquí a América Latina o en México. Tenemos contenidos de todos lados: de anime, de Japón, de series como Battlestar Galactica, de Madmen, Weeds. Muchas películas clásicas y también muchas películas de todas partes del mundo. Lo bueno de Netflix es que cada persona puede encontrar algo bueno para ellos. Así mismo. Y ese es la gran diferencia entre lo que es Netflix y lo que es televisión tradicional”</p> <p>Translation: “I think that it is a great opportunity for people to enjoy things that would never get released here in Latin America or Mexico. We have content from everywhere:</p>

			anime, Japan, series like Battlestar Galactica, Madmen, Weeds. A lot of classic movies and a lot of movies from all over the world. The good thing about Netflix is that every person can find something that is good for them. That’s the big difference between Netflix and traditional television.”
	Netflix counters piracy	<p>Item 6a 6:4 6:5</p> <p>Item 26 26:5</p>	<p>“Ellos ven la piratería como agua gratis que pueden beber cuando quieran, aún así hay gente que va a comprar agua embotellada porque es más higiénica o porque les gusta más, así es Netflix.”</p> <p>Translation: “[They (the youth) see piracy as free water that they can drink whenever they want. Even so, there are people who’d rather buy bottled water because it is more hygienic or because they like it more. That’s Netflix].”</p>
	Other entertainment platforms	<p>Item 21 21:8</p> <p>Item 44 44:7</p>	<p>“Se incrementa la competencia con Disney+, Apple TV+ y HBO Max, pero todos somos pequeños en comparación con la televisión lineal”</p> <p>Translation: “competition is increasing with Disney+, Apple TV+ and HBO Max, but we are all small in comparison to linear television”</p>