

Content characterization of Latin American film productions on Netflix: a Bolivian perspective

Caracterización de las producciones cinematográficas latinoamericanas en Netflix: perspectivas desde Bolivia

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We study international film flows between Bolivia and Latin America to explore the lack of Bolivian content on Netflix and its limited presence in other SVOD platforms. We characterize Netflix originals, third-party content, and recent Bolivian films, and develop a thematic analysis of their synopsis and genre description, completed with the results of a survey on the Bolivian consumption of streaming content. We identify common patterns in Netflix content and show how it differs from the more nationally minded Bolivian cinematic tradition. Our results point to a homogenizing effect SVOD platforms like Netflix might have on film productions.

KEYWORDS: Netflix, film production, international film distribution, Bolivia, content analysis.

En este artículo estudiamos los flujos filmicos entre Bolivia y Latinoamérica para explorar la subrepresentación del país en Netflix y su limitada presencia en otras plataformas de streaming. Caracterizamos el contenido original y de terceros disponible en Netflix y películas bolivianas recientes, desarrollando un análisis temático basado en sus sinopsis y géneros cinematográficos, que se completa con resultados de una encuesta sobre el consumo boliviano de streaming. Identificamos patrones comunes en el contenido de Netflix y mostramos sus diferencias con la producción boliviana, más alineada con una tradición típica de un cine nacional. Los resultados sugieren un efecto homogeneizador que podrían tener plataformas como Netflix en la producción audiovisual local.

PALABRAS CLAVE: Netflix, producción cinematográfica, distribución internacional, streaming, Bolivia, análisis de contenido.

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INTRODUCTION

The emergence and rapid spread of new digital technologies, at the end of the 20th century, sparked a series of transformations in the consumption habits of people around the globe. In the case of entertainment and cultural goods,⁵ the proliferation of domestic Internet connections, personal computers, and digital video devices such as the DVD, led to significant changes both on their supply and demand. Research efforts on the synergies and tensions between traditional business models in the cultural industries, and those emerging with digital technologies, began to appear in the mid-2000s. Eliashberg et al. (2006) were the first to put forth the idea that releasing a new movie on video-on-demand (VOD) or home video, before or at the same time as in cinemas, could lead to higher revenues for the studios. Later studies would similarly hold that digital technologies offered opportunities for optimization in film release strategies. For instance, in the channels, timing and promotional strategies used (Calzada & Valletti, 2012; Cunningham et al., 2010; Doyle, 2016; Hennig-Thurau et al., 2007); beginning to outline the research agenda today focusing on digital film distribution worldwide.⁶ Nonetheless, since these transformations tended to replicate existing asymmetries in the entertainment industries, with the leading companies established in the US, more recent works began to look into international film flows in the context of the Global South and the cinematic traditions of developing countries (Albornoz & García Leiva, 2017a; Cornelio-Marí, 2020; Lobato, 2019; Lobato & Lotz, 2020). The

⁵ UNESCO (2009) defines cultural goods as those “that convey ideas, symbols and ways of life, i.e., books, magazines, multimedia products, software, recordings, films, videos, audio-visual programmes, crafts and fashion”. In this study we consider cultural goods to be the larger category, thus using that notation to refer to both artistic and entertainment goods.

⁶ Simultaneously, as pointed by Albornoz & García Leiva (2017a), there is a growing concern among different social actors (UNESCO, the EU, to mention a few), about the role of cultural industries in the very dynamic and complex digital ecosystem and how to design and adopt promotion and protection policies for them.

present work attempts to contribute to these lines of research, analyzing the effects of digital film distribution through streaming platforms on the internationalization of Bolivian audiovisual productions.

Netflix, a company based in Los Angeles with a global presence in over 190 countries, is the most emblematic of the new digital video streaming platforms and, thus, of the disruptions they have provoked. By late 2019, Netflix had 167 million subscribers worldwide, with more than 60% of them outside the US (Statista, 2019). Indeed, the company has adopted an expansive global strategy, entering the Latin American market in 2011, where it has experienced significant growth, doubling its subscriber base between 2017 and 2019 (Lee, 2019). Beyond this globalized nature, researchers have noted that the best way to approach its analysis is by looking at regional markets, since the company's catalog fluctuates geographically (Lobato & Lotz, 2020). Some of these changes are due to copyright issues, since part of the content Netflix distributes is not owned by the company. This led the company to invest in proprietary content, spending over 17 billion dollars in 2020 (Spangler, 2020), with a growing focus on regional markets. In the case of Latin America, Netflix greenlighted 70 original regional productions in recent years (De la Fuente, 2018). In this line, to understand what are the characteristics of the content that Netflix decides to acquire, produce, and distribute for the Latin American market, and how these decisions affect local film production and consumption, are the questions motivating our study.

Digital film distribution has upended the traditional internationalization dynamics in the industry. In the past, theater chains and TV firms (broadcast, cable, and pay-per-view) were the main international exhibitors of entertainment media (Mirrlees, 2013), with festivals and specialized circuits completing the channels used by Latin American film producers to distribute their work to regional and global markets. In the past, Bolivian filmmakers had found some success following such internationalization routes.⁷ Yet, as of December,

⁷ Among the films released since 2015 and restricted to top international film festival participation, *Viejo calavera* directed by Kiro Russo, won a Special Mention (Filmmakers of the Present) was nominated to the Golden

2020, no Bolivian content is available on Netflix. This is an intriguing observation, given that streaming platforms have not only changed how a local film finds an international audience, but also the type of content a local audience has access to, setting in motion a cycle that can affect local film industries beyond their participation on specific platforms. With this in mind, we take focus on the Bolivian case for our characterization of the content found on streaming platforms, outlining a comparison with the Latin American films available for Bolivian audiences to stream on Netflix, as well as those which reached the Bolivian market through the traditional channels previously mentioned.

This article investigates the following research question: What are the thematic and narrative characteristics of Latin American and Bolivian films distributed internationally on subscription video on demand (SVOD) platforms such as Netflix? We employ a mixed quantitative and qualitative approach consisting of a characterization of these films, which we complete with primary information from users of SVOD in Bolivia. Our goal is to bring light to the types of content flowing inside and outside specific countries and regions through streaming platforms, with a focus on Bolivia, Latin America, and Netflix. The main contributions of this study are: 1) A thematic and genre characterization of the content Netflix produces as original films and the content it licenses from third parties in the Latin American market; 2) A thematic and genre characterization of recently released

Leopard at the Locarno International Film Festival, and was nominated to the Horizons Award at the San Sebastián International Film Festival. Similarly, *Eugenia*, directed by Martín Boulocq, was nominated to the Best Latin-American Film award at the Mar del Plata Film Festival. International TV distribution has also been a channel successfully used by Bolivian producers to reach international markets. For instance, European TV networks such as RAI or RTVE have broadcast Bolivian films in the past. However, given the data available and the apparent predominance of festivals as a channel over TV or traditional theatre distribution, among Bolivian films released between 2015 and 2020, when examining the internationalization channels these audiovisual products have used we focus exclusively on streaming platforms and international film festivals.

Bolivian films; 3) A comparison between Latin American and Bolivian content available internationally on SVOD; 4) Insights on the effect of Netflix and international digital video distribution on national film production and consumption. We find some common characteristics between the content Netflix licenses from third parties and Bolivian films available on SVOD, and an apparent trend towards homogeneity in the thematic and narrative characteristics of Netflix originals films. On the other hand, Bolivian films showcase a strong focus on national and historical themes; particularly those that are internationally distributed outside of SVOD platforms (i.e., in film festivals). Regarding the effect on local audiences, the consumption of international content distributed by Netflix is vastly superior to Bolivian content available on streaming platforms. Although this disproportionality may not be surprising given the size of the Bolivian film industry, when coupled with the homogenizing trend observed in Netflix's content, it may have implications on the types of content favored by local audiences and thus potentially extend its effect to local film production a well.

DIGITAL FILM DISTRIBUTION, INTERNATIONALIZATION, AND ITS EFFECTS ON THE CONSUMPTION AND PRODUCTION OF CONTENT

The last decade has seen the consolidation of new business models in the film industry, with distinct logics and priorities, sometimes at odds with the traditionally prevailing ones (Clement et al., 2018; Hadida et al., 2020; Jenner, 2018; Lobato, 2019; Lotz, 2014; Navarro Sierra, 2015). Among these, we find the appearance and global expansion of Subscription Video on Demand (SVOD) services like Netflix, Amazon Prime Video, Disney+, among many others. The extent of this disruption has gone beyond film distribution and exhibition, as SVOD platforms realized that the control of the intellectual property they were distributing was key to strengthening their strategic positions. The content these platforms distribute comes from two sources: licensed third-party content (film and TV productions created and owned by different people or companies, who get paid royalties whenever a distributor wants to include the content in their platform) or proprietary content (in-house productions that do not involve significant payments beyond the production costs).

In recent years, SVOD companies have begun to acquire new content or invest in their own productions. How these investment decisions are made, and which content is produced and then distributed to which markets is a question that has intrigued academics and practitioners. Research on the relation between content and market metrics in the film industry is abundant. Indeed, there seem to be links between certain content characteristics (series, sequels, book adaptations, actors and directors involved) and its success. Kübler et al. (2020) developed a framework for the valuation of the content available on digital video subscription platforms, proposing to analyze: 1. Storytelling characteristics and quality signals (length, format, genre, adaptation, remake, etc.); 2. Monetary and artistic power (actors and directors box-office records and audience awareness, awards and nominations, etc.); and 3. Forward and reciprocal spill-overs (number of seasons and episodes, recency, number of viewers, etc.).

To a large extent, our analysis builds on these criteria to develop a characterization of the Latin American content distributed on Netflix (both licensed and proprietary) and of Bolivian films produced between 2015 and 2020. However, we also bring a focus to the effect of internationalization on the content that is created and distributed by SVOD platforms. Netflix envisions itself as a “global business”, offering local-language content in 70 of the 190 countries where it is present, often expecting to turn these shows and films into pan-regional hits (Spangler, 2018). Hence, the characteristics of the content that might at one time cater to country specific demands, but also possess the potential to attract international markets, is one of the company’s main concerns.

Several studies have approached this issue. For instance, Aguiar and Waldfogel (2018) examine whether the internationalization of content is unidirectional and/or may lead to the overrepresentation of US-content. They find that international theatrical distribution already favored US productions, while in the case of Netflix this bias is slightly diminished, with many countries exporting content through the platform. However, this analysis is limited to the quantitative aspects of such content.⁸ An

⁸ Aside from the macro level of international film distribution, facing exhibition and consumer decisions, it is not yet clear how Netflix’s algorithms

approach based on numeric indicators alone may not reveal if the market logic brought forward by Netflix and international film distribution on SVOD is reshaping the content itself. It may be true that more films produced in countries with less developed film industries are finding international audiences through SVOD, but how are those productions in terms of their format, themes, and narratives? Are they comparable to content that finds international distribution elsewhere? And how do they compare to the international content being imported?

These questions have been explored in the literature from different perspectives and with diverse methodological strategies. One of the main preoccupations of such studies has to do with diversity and the situation of local film industries that may struggle to compete with the reach and financial might of Netflix, or simply get lost in the middle of catalogs monopolized by foreign productions and largely driven by algorithm-based recommender systems. Lobato (2018) proposes several paths to analyze said catalog (cultural and linguistic diversity, location strategy, imperialism, distribution practices for local and foreign content), highlighting the increased complexity introduced by recommendation systems and suggesting to complement catalog examinations with evidence from the audiences (a strategy we follow).

Similar studies can be found for the cases of Australia (Cunningham & Scarlata, 2020) and Mexico (Cornelio-Mari, 2020). The latter finds that locally-created content offered on Netflix has certain characteristics that seem either to replicate or critique existing archetypes in local tastes (for instance, melodramas such as Televisa's telenovelas and their ironic Netflix counterpart *La Casa de las Flores*). The former holds that regional Netflix content may appear to struggle to grasp the sensibilities of a local public, while established national producers can more closely cater to it (i.e., audience and critical reviews of Stan's Australian original content were far superior to their Netflix-produced

work when prioritizing some content and obscuring others. The company has not revealed much about this, simply mentioning that their consumer-centric approach bases those decisions on the user's past choices and behaviors, and academic research on the topic is still emerging (see Siles & Espinoza-Rojas, 2019).

regional counterparts). Subtler transnational dynamics are also at play through translations and dubbing, as examined by Jenner (2018), or the scheduling of releases.⁹

Another concern surrounding international film distribution through SVOD relates to representational and diversity issues. Namely, the effect it may have on what could be considered a “national cinema”, defined as a filmic production that, as a corpus:

on the one hand... look[s] inward, reflecting on the nation itself, on its past, present and future, its cultural heritage, its indigenous traditions, its sense of common identity and continuity. [And o]n the other hand... seems to look out across its borders, asserting its difference from other national cinemas, proclaiming its sense of otherness (Higson in Hjort & Mackenzie, 2000, p. 67).¹⁰

The digital disruption experienced in the film industry has affected national cinemas as well. Hershfield (2000) noted that the new technologies of production, distribution and exhibition would allow producers to focus on localized audiences, forgoing competition for global markets, although fitting into such models may cause narrative and aesthetic conventions to be modified. He also suggested that national cinemas are the product of the “complex operation of shifting strategies and alliances of domestic and foreign policies, economic and political ideologies, and social and cultural practices” (Hershfield, 2000, p. 273). Hence, even if national cinemas would continue to exist away

⁹ Studies at the consumer level, from the perspective of recommendation systems and choice, are still far less common. Perhaps McKenzie et al. (2019), Siles et al. (2019) and Turner (2019), offer the insights most relevant to our work.

¹⁰ We are aware of the complex and still-developing research on this conceptualization. However, we are forced to leave such discussion outside of the scope of this study, opting for a more pragmatic definition of national cinemas, built on Higson (1989) and operationalized through the nationality with which the film has been indexed in international databases such as IMDB and Filmaffinity. We expand on this in the methodological section.

from Digital video Subscription Platforms (DSPs), their singularities could not remain unaffected in a highly globalized industry. Moreover, audience choices do not follow categorical local-global patterns, instead operationalizing more complex and impermanent identity constructs (Lobato, 2019). For instance, preferring international programming for some things and national productions for others (e.g., Hollywood dramas and local news). How much of viewer experience is determined by supply is not obvious, which invites researchers to develop measures of welfare that move from economic criteria to contemplate media democratization and the fair representation of the diverse components of a society (Albornoz & García Leiva, 2017b). We approach some of these issues in the following sections.

METHODS AND MATERIALS

This work follows a three-step, two-sided, predominantly qualitative methodology. Specifically: 1) We develop a supply-side analysis of film production in Latin America; 2) Characterize these films; and 3) Analyze the consumer side in Bolivia. Our study comprises the films released between 2015 and 2020 in the following categories: Netflix original Latin American films, third-party Latin American films, and Bolivian films released between 2015 and 2020 (available on SVOD or not). The content we study on Netflix was limited to the films available to stream in Bolivia by early December, 2020. In the case of Bolivian productions, we cover all major releases in the six-year period, irrespective of the distribution channels used.

For the analysis of the supply side, we first compiled a systematic list of the Latin American films released within our period of study. A database including each film's release date, title, run time, production company, synopsis, genres, keywords, platforms where it is available, festival participation, box office revenue, and audience rating, was then developed with data gathered from Filmaffinity. We chose this movie recommendation website because of the language (Spanish) and the comprehensive information it has for films in the period and region. Our database was completed with information from IMDB, The Numbers and Box Office Mojo, as well as the personal archives

of the research team and some Bolivian film producers. We separated Bolivian films from those released in other Latin American countries in the period. Our criteria for determining the nationality of a film was based on the country it was indexed with in FilmAffinity. We hence excluded international co-productions not based in a Latin American country (for instance, *Narcos*, *Street Food*, *El Vato* or *Third Mile*) as well as films produced in Spain and Brazil. Series were also left out, since there is no Bolivian serialized content to establish a comparison.¹¹

The next stage of the analysis consisted in a two-tier process of characterization. First, we classify the films based on their format, production company, and country of origin. Next, we follow a quantitative analysis of qualitative content methodology, in line with Schreier (2012), with the goal of understanding each category in terms of their themes and narrative. Schreier proposes to develop a frame for content analysis (in general not just film) in a “concept-driven way”, which in our case is structured through the nationality and release date, with other categories emerging from the data. We created tables with those two categories as thread lines, then we processed the films’ synopsis and genre tags using the software NVivo 12 and developed word-frequency count tables, following an iterative process to exclude grammatical connectors, adverbs, adjectives, and names. The resulting tables are discussed in a hermeneutic interpretation of the narrative characteristics they entail, contemplating the content valuation criteria developed by Kübler et al. (2020). That is, the content under study is taken to a framework including: length, genre, festival participation, and audience ratings, to complete its analysis following the word counts.

¹¹ FilmAffinity does not reveal their criteria for indexing a film with a specific nationality. However, it is consistent with other platforms like IMDB, which bases their decision on the source of funding (i.e., the country where the production company is based on). We acknowledge the limitations of using such simplifying heuristic and have decided to leave co-productions and international shoots outside of our scope of analysis due to the distinct dynamics intervening in those relations, which predate and go beyond international film distribution via SVOD. Brazil is not included in our study due to the size of the industry and because it is often considered a separate market.

On the side of the consumers, we gathered information on the usage of Netflix and other DSPs from 340 adult Bolivians, who voluntarily and anonymously participated in a survey. This survey was developed including questions about their viewing habits, the films and series they had seen in the past year (using lists with 10 randomly selected titles for each category of analysis), the factors influencing their viewing decisions and relevant background data. We also controlled for Covid-19 effects in the frequency of use and adoption of SVOD. We followed a non-probabilistic convenience sampling method, which we believe to be appropriate given the exploratory and descriptive nature of the study. The survey was circulated during 20 days in December 2020 and is available in Appendix N° 1.¹²

RESULTS: CHARACTERIZATION OF THE CONTENT AND THE CONSUMERS

Participation and consumption habits in Bolivia: SVOD, Netflix and Latin American films

Netflix started offering their services in Bolivia in 2011, although it did not gain widespread adoption until 2015 (Statista, 2020). To the best of our knowledge, there is no data available on the number of users the platform has in the country, nor on the entertainment consumption habits of Bolivians in general. We obtained data on some of the most relevant variables pertaining to these aspects using a survey, as previously described.¹³

The participants are evenly split between men and women, in line with the demographic data for the country. There are slight sample biases in terms of the age and educational attainment. A 28.3% of the respondents are between 18 and 24 years old, which might lead to the overrepresentation of this age group. This could come from having distributed the survey among university students, although not

¹² All appendices can be found online, following the link included in the concluding sections.

¹³ The detailed demographic information of the participants is presented in Appendix N° 2.

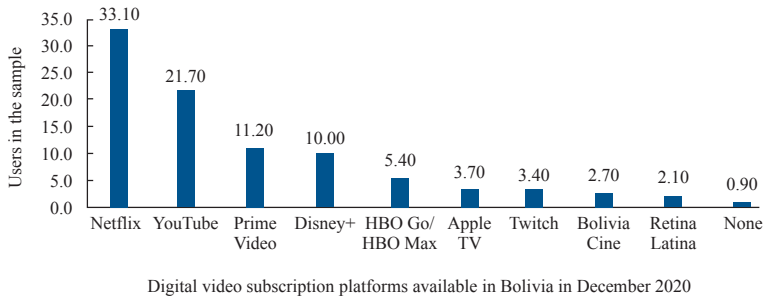
exclusively. A similar bias occurs in terms of the educational level of the respondents. The survey was informally circulated in social media by the researchers (WhatsApp, Facebook), which could have led to a higher number of university-educated participants. Nevertheless, this study did not follow a probabilistic or stratified sampling procedure because we do not intend to present a comprehensive picture of the Bolivian population, but to provide primary information on the use of SVOD in the country.

Furthermore, even if the majority of the respondents may come from a wealthier, urban, and highly-educated subset of the population, such biases potentially reflect other characteristics of the participation in these services. In the case of the US, there is no explicit relation between the educational level and the use of Netflix (Iqbal, 2020), even though people with higher degrees more often have a SVOD subscription (Jay, 2020). The median age of Netflix subscribers in the US was lower when the streaming service was first introduced (today it is between 35 and 44), which could also be happening in Bolivia, where the service market penetration is still in its early stages. And although the subscriber base of Netflix is evenly split across the income brackets in the US, it has been argued that the market niche of the service in developing countries could be closer to “cosmopolitan upper classes” and those who can afford high-speed Internet connections (Lobato, 2019), which might explain that 73.2% of our sample who is a Netflix subscriber has at least a Bachelor’s degree, while 37.5% of those with vocational or technical training claim not to use any DSP. We present a summary of the subscription and usage statistics below.

It is interesting that less than 1% of the survey participants do not use any of the DSPs presented to them.¹⁴ Unsurprisingly, Netflix is the leading streaming service, with a 33.1% of users in the sample. The closest competitor is Prime Video, with a third of the users that Netflix has in the sample. The third place goes to Disney+, which has positioned itself in a comparatively short time. Specialized SVOD platforms such as Retina Latina (Latin American film) and Bolivia Cine (Bolivian

¹⁴ The survey included eight other options which are not presented in the graph because they obtained less than 2% replies each.

FIGURE 1
USE OF DIGITAL VIDEO SUBSCRIPTION PLATFORMS IN THE SAMPLE



Source: The authors.

film) are used by 2.1% and 2.7% of our sample.¹⁵ Free DSPs such as YouTube and Twitch are also widely used (25.4% of the sample).

Based on the results of our survey we can characterize the audiovisual content consumption of Bolivians, who regularly use DSPs, in the following summary.¹⁶

1. Bolivian audiences overwhelmingly consume audiovisual content at home.¹⁴
2. Bolivian audiences largely decide what to watch once they enter the platform.

¹⁵ Launched in February, 2020, Bolivia Cine is the first Bolivian streaming platform. Most of its catalog comprises Bolivian cinema, although it also offers some Latin American content. As of December, 2020, it offers 79 movies (63 feature films, including fiction and documentaries, and 16 short films). The service is available worldwide, with copyright restrictions (some films are only available in Bolivia or Latin America). The platform allows users to buy/download films or rent them for a few days. Their short films are offered to stream for free.

¹⁶ A detailed examination of these results is included in Appendix N° 3.

¹⁷ To a certain extent, economic factors could be driving these numbers. On average, the price of a cinema ticket in Bolivia is around 8 USD, with an urban

3. Bolivian audiences decide what to watch based on recommendations from friends and professional reviews.
4. Bolivian audiences seldom watch Bolivian films.
5. Bolivian audiences seldom watch Latin American cinema.
6. Production or distribution by Netflix is an important factor in the decision of Bolivian audiences who watch Latin American cinema.
7. Bolivian audiences' consumption of international films and series is influenced by media and audience phenomena.

These patterns are broadly equivalent to what has been observed at a global level or in regionalized audience studies (Iqbal, 2020; Jay, 2020; Jenner, 2018). Moreover, our results provide empirical support for arguments theoretically put forth by Lobato (2019), among others, highlighting the effects of Netflix on the practices and participation of streaming users. Nonetheless, economic, social, and technological factors play important roles in the establishment and consolidation of such consumption habits and practices, which calls for a nuanced interpretation that should go beyond mere content analysis.

*A characterization of SVOD and international audiovisual content:
Bolivian film, Netflix originals and Latin American cinema*

We now turn our attention to the analysis of the supply side of SVOD in Bolivia and Latin America. For this we use data we obtained for the films and series available on Netflix in Bolivia (by early December, 2020), released between January, 2015 and December, 2020. As described in the methodological section, we characterize these following a two-

average monthly income of 465 USD in 2019, according to the National Statistics Institute (INE, 2019). A monthly Netflix subscription in Bolivia costs 7.99 USD, making it a rather cost-effective entertainment option for families. The subscription prices of other DSPs are similar: Disney+ 5.99 USD, Amazon Prime 5.99 USD. Bolivia Cine, a SVOD platform specialized on Bolivian films, offers several pricing options: to buy a new release for 5.05 USD, to buy a “classic” film for 2.89 USD, to rent a new release for 2.89 USD, and to rent a “classic” for 1.44 USD (all the prices and exchange rates were valid for December, 2020).

tier process. First, we classified the films and series according to their format, production/distribution company, and country of origin. Then, we proceeded with a content-analysis methodology.

The categories we propose for the first tier of the analysis are:

- a. *Format*: Film, TV series.
- b. *Production and/or distribution company*: Third-party licensed content, Netflix owned content.
- c. *Country of origin*: Bolivia, Other Latin American countries.

The data obtained for all the films and series released between 2015 and 2020, indexed with a Latin American country of origin (including Bolivia), and available to stream in Bolivia by December, 2020, was classified as presented below.

TABLE 1
LATIN AMERICAN AND BOLIVIAN CONTENT RELEASED BETWEEN 2015
AND 2020 AVAILABLE TO STREAM IN BOLIVIA BY DECEMBER 2020

	<i>Netflix owned</i>	Third-party	Bolivians	Total
TV series	55	19	0	74
Films	30	96	41	167
Total	85	115	41	241

Source: The authors.

It must be noted that none of the 41 Bolivian films released in the period are available on Netflix, but on other platforms such as Bolivia Cine, Prime Video or Vimeo on demand. From now on, for brevity, whenever we say, “other platforms”, we mean any streaming service available in Bolivia but Netflix. Moreover, there are no Netflix original productions from Bolivia, or any Bolivian content available to stream on the platform.¹⁸ There are 23 other Bolivian films, released between

¹⁸ It must be noted that there are Netflix original shows and documentaries that have been shot in Bolivia (*Andes Mágicos*, *Street Food: Latin America*), in

2015 and 2020, not available on any SVOD platform by December 2020. This may be because these films were previously on some platform but not anymore or are subject to copyright issues that do not allow for their digital distribution. What is certain is that a vast majority of them (between 80 to 90%) were internationally premiered in film festivals. A summary table with the ten Bolivian films included in the survey, randomly selected from those premiered in the period, irrespective of their streaming availability, can be found in Appendix N° 4.

Regarding the international content, it is worth mentioning that a majority of the Latin American productions released on Netflix in this period corresponds to film (70%). This content is still mostly licensed from third parties, but only on a proportion of 4 to 3 in favor of productions not owned by Netflix. With that in mind, it is interesting that 65% of Netflix original content corresponds to series, while 83% of the third-party content comprises films. These ratios are consistent with Netflix's global content strategy.¹⁹ Indeed, the bias for serialized content may align with the positive spill-overs in valuation from repeated engagement suggested by Kübler et al. (2020).

As a result, we determine the following categories to carry on to the content analysis stage:

- Netflix original films
- Third-party films licensed by Netflix
- Bolivian films available on SVOD
- Bolivian films not on SVOD

some cases with local crews, although these are left out of the study as described in the methodological section because their indexing country, per the production company, is the US and not Bolivia.

¹⁹ In the past decade, Netflix's film catalog has decreased while its investment in serialized content has continued to grow. Even if the proportion of series in its catalogue is still around 28 or 33%, this rate was only 7% in 2010 (Clark, 2018; Jones, 2019). The estimation is that Netflix now has in its global catalogue 45% less movies and 400% more series than in 2010 (Cassillo & Schwindt, 2020). Based on our findings we could argue that the company's global strategy follows similar patterns in its regional markets.

The data for each of the films was classified in these categories before processing their synopses and genre information, to find the most frequently used words. This gives us an overview of the narratives, themes and interests depicted in these films and series. We present the word frequency counts for each of the film categories in Table 2.

The word clouds for each of the categories and the bar charts with the top 20 most frequently used words are included in Appendix N° 7. To avoid any interpretation bias stemming from translation, we kept the words in Spanish, as originally gathered from FilmAffinity. However, we include a table with the English equivalences in Appendix N° 8. Now, we analyze the themes and narratives of each category, based on the results from the word frequency count.

THEMATIC AND NARRATIVE ANALYSIS OF NETFLIX ORIGINAL FILMS

In Table 2 we can see that the most frequently used words in the synopsis and genre description for these films are: “familias” (families), “comedia” (comedy), “drama”, “documental” (documentary), “carrera” (career), “hombre” (man), “grupo” (group), and “historia” (story). In terms of the genre, those three are the most prevalent in Netflix global catalogue as well: 41% of its content are documentaries, while 21% of the fiction feature-length productions are dramas and 16% comedies (Follows, 2017). This is also consistent with the demand, since 16.23% of our sample claims to most often watch dramas, 15.98% comedies, and 14.42% documentaries. Family comedies such as *La boda de la abuela* were watched by 6.73% of our sample. Family-centric plots are also common in melodramas, one of the recurrent subgenres of Netflix original content, as noted by Cornelio-Mari (2020). On the other hand, while “historia” could both signal a narrative approach to storytelling, over more observational or experimental forms, it could also be a term related to period-pieces and documentaries, such as *La Noche de 12 años* or *Roma*.²⁰ It should not go without mentioning that these films are ostensibly male-centric narratives, as evidenced by “hombre” (man)

²⁰ *La boda de la abuela* (Dir. Javier Colinas, Mexico, 2019), *La noche de 12 años* (Dir. Álvaro Brechner, Uruguay, 2018), *Roma* (Dir. Alfonso Cuarón, Mexico, 2018).

TABLE 2
WORD FREQUENCY COUNT FOR THE SYNOPSIS OF LATIN AMERICAN AND BOLIVIAN FILMS RELEASE BETWEEN 2015 AND 2020 AVAILABLE TO STREAM IN BOLIVIA BY DECEMBER 2020

	Netflix Original Films	Third-party Films	Bolivian films on SVOD	Bolivian films not on SVOD			
Families	2.36%	Comedy	4.03%	Story	2.91%	Drama	1.60%
Comedy	1.81%	Drama	2.66%	Bolivia	2.61%	Bolivia	1.37%
Drama	1.81%	Family	2.32%	Documentary	2.30%	Documentary	1.37%
Documentary	1.63%	Documentary	2.05%	Drama	1.99%	Moment	1.37%
Career	1.27%	Story	1.64%	Family	1.23%	Police officers	1.14%
Man	1.09%	Father	1.37%	World	1.23%	Story	1.14%
Group	0.91%	Friends	1.16%	Father	1.23%	Man	0.92%
Story	0.91%	Woman	1.16%	City	1.07%	Wife	0.92%
Unexpected	0.91%	Romance	1.16%	Bolivian	0.92%	Stays	0.92%
Together	0.91%	Young	1.02%	War	0.92%	Friendship	0.69%

Source: The authors.

being the sixth most frequent word. Moreover, not only is “mujer” (woman) missing in the count; when it appears, it is in gendered roles (“madre” (mother), “abuela” (grandmother), “esposa” (wife) or as “chica” (girl), failing to put women on the same level with “hombre” (man).

Thematic and narrative analysis of third-party films available on Netflix

In Table 2 we can see that the most frequently used words in the synopsis and genre description for these films are: “comedia” (comedy), “drama”, “familia” (family), “documental”, “historia” (story), “padre” (father), “amigos” (friends), “mujer” (woman), and “romance”. Hence, generally speaking, we can say that the films Netflix licenses from other Latin American production companies are in the same genres as those it produces. Some differences appear from the side of romantic comedies and narratives about couples, as indicated by the words “romance” and the appearance of “mujer”, which is often found in the context of a relationship in these synopses (see *Gloria* or *Lo más sencillo es complicarlo todo*). Narratives about travel and others aimed at young adults and their groups of friends, like those found in *Una especie de familia*, *El otro hermano*, *Yo, adolescente* and *Mi mejor amigo*, mark a difference with respect to original content, too.²¹ Mexico remains the largest producer of content with 31.25%, followed by Argentina (18.75%) and Colombia (18.75%). However, other regions are more evenly represented in the catalog. For a comparison, in the case of original Netflix films, Argentina and Colombia, respectively, amount to 26.7% and 7%, to Mexico’s 55%. Moreover, third-party licensed films come from 10 different countries, whereas Netflix produced original films only in six of them.

Thematic and narrative analysis of Bolivian films available on streaming platforms

²¹ *Gloria* (Dir. Sebastián Lelio, Chile, 2013), *Lo más sencillo es complicarlo todo* (Dir. René Bueno, Mexico, 2018), *Una especie de familia* (Dir. Diego Lerman, Argentina, 2017), *El otro hermano* (Dir. Adrián Caetano, Argentina, 2017), *Yo, adolescente* (Dir. Lucas Santa Ana, Argentina, 2020), *Mi mejor amigo* (Dir. Martin Deus, Argentina, 2018).

FIGURE 2
SYNOPSIS AND GENRE WORD CLOUD FOR BOLIVIAN FILMS RELEASED IN 2015-2020 AND AVAILABLE TO STREAM INTERNATIONALLY



Source: The authors with data from Filmaffinity (2020).

FIGURE 3
SYNOPSIS AND GENRE WORD CLOUD FOR BOLIVIAN FILMS RELEASED IN 2015-2020 NOT AVAILABLE ON SVOD



Source: The authors with data from Filmaffinity (2020).

To graphically illustrate the themes and narratives of Bolivian films, we next present the word clouds obtained from the frequency count of their synopses and genre descriptions.

In Table 2 and the word cloud in Figure 2 we can see that the most frequently used words in the synopsis and genre description for these films are: “historia” (story), “Bolivia”, “documental” (documentary), “drama”, “familia” (family), “mundo” (world), “padre” (father), “ciudad” (city). The predominant genres in this case are documentaries and dramas, which aligns with Netflix and third-party produced content. However, only four out of 41 Bolivian films in this category are comedies. This might owe to the difference in each platform’s user profile; comedies are less frequently found in Mubi or Curiosity Stream, to cite two examples. The platforms where Bolivian films are most often available to stream internationally are Bolivia Cine (a specialized platform where 90% of Bolivian films available on SVOD

are present), Prime Video (28%), Filmin (21%), as well as Vimeo on Demand, and Mowies.

It is worth noting that “ciudad” (city) signals the predominance of urban narratives among these films, which is somewhat unexpected in a cinematic tradition where the stereotype of indigenous themes has been its international calling card since the 1950s. That said, this would nevertheless seem to be a film production that still caters to a national audience, if we are to consider the frequency of the word “Bolivia” a valid indicator. We can estimate that at least 57% of these films deal with historical or social themes of interest to Bolivians, thus requiring certain familiarity with the broader context of the country, unlike the comedies or romantic stories available on Netflix. This thematic prevalence might be an effect of the heritage of Third Cinema in Bolivia, since one of its leading lights was Jorge Sanjinés, a filmmaker who remains active today and whose work still has an outsized influence in Bolivian cinema.²²

Thematic and narrative analysis of Bolivian films not available on SVOD

In Table 2 and the word cloud in Figure 3 we can see that the most frequently used words in the synopsis and genre description for these films are: “drama”, “Bolivia”, “documental” (documentary), “momento” (moment), “policías” (police officers), “historia” (story), “hombre” (man), “esposa” (wife). In general, these are not dissimilar from the most repeated words in the synopsis and genre description of Bolivian films available on streaming platforms. The two main genres are still dramas and documentaries, although the proportion of comedies is higher in this case (24% to a 9.8% in the case of Bolivian films on SVOD). The family component is no longer present, which may signal a shift from melodramas to thrillers. Indeed, there are crime dramas (26%) and horror films (13%) in this category, which were not

²² Third Cinema was a 1960s and 1970s movement led by filmmakers from the so-called developing countries, whose intention was to create films that dealt with the post-colonial nature of their national experiences, moving away from Hollywood and cinema-as-entertainment views to become politicized and often position itself as a revolutionary tool. See Solanas & Gettino (1970) for a more precise introduction to the concept.

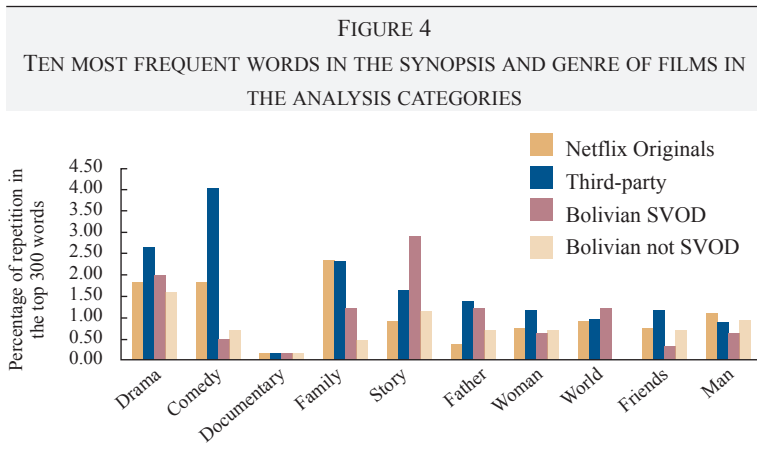
as prevalent in the case of Bolivian films available on SVOD. Something similar occurs with “historia” and “momento”, which could indicate a retrospective, ethnological or observational approach in these films, interested in capturing slices of social life (moments, per the word used in the synopsis). For example, one can see that about 20% of the Bolivian documentaries are heterodox registers flirting with the conventions of non-fiction, such as *Cómo matar a tu presidente* or *Procrastinación*, supporting this intuition. As discussed in the previous section, this is a character present in older films in the Bolivian cinematic tradition as well. Moreover, here, the frequent use of Bolivia in the synopses would seem to reiterate the domestic-market and/or national-cinema affectations of these films.

DISCUSSION, LIMITATIONS AND CONCLUDING REMARKS

Factors affecting the internationalization of Bolivian films, diversity and representation in SVOD platforms, local markets and national cinemas

There are multiple factors involved in lack of Bolivian content on Netflix, namely the bargaining dynamics in a sector where Netflix and other distributors hold significant (quasi-oligopolistic) power, as well as the smallness of Bolivia as a market and industry, product characteristics could still be a factor worth analyzing. Indeed, we use the data from content analysis and the characterization of Latin American and Bolivian film to argue the effects on audiences and production coming from Netflix’s outsized role as an international distributor with localized content and presence. And while it is still early to observe entrenched effects, some evidence may appear in the narrative and thematic characterizations developed in previous sections. Ultimately, we comment on how diversity may be affected, and if the characteristics of the films and series being created for SVOD may influence what could be called “national cinemas”, through our content analysis and demand data.

We first compare the word frequency counts to find insights on the thematic similarities and differences between each type of content, as presented in Figure 4.



Source: The authors.

Basing our comparison on the word frequencies presented in Figure 4, we can say that, on the thematic level, Bolivian films appear to have more in common with Latin American films that are not originally produced by Netflix. Although documentaries are a common genre to the three types of content, comedies, family stories and melodramas seem to be more prevalent among Netflix original films. Historical narratives are salient in the three types of content; however, the national specificity of the Bolivian case is different than the Mexican or Argentinian ones, for these countries have a greater level of cultural influence in the continent. Namely, Bolivia lacks figures as salient as Maradona, Luis Miguel or Pablo Escobar, who have featured in Netflix's original content.

The size of the Bolivian market is also a factor potentially driving the underrepresentation of Bolivian content on Netflix. The country has a relatively small population, even before considering the segment that may be able to access Netflix's service. Bolivia also lacks a support ecosystem for its film industry, with private and public participants, educational institutions, and a clear normative framework (even in matters as elemental as the enforcement of copyright law). This can certainly hinder the development of an international market for Bolivian films, affecting their supply and the local demand for content.

Moreover, that seems to be a problem common to several countries in Latin America with smaller markets and industries, like Ecuador or Honduras, both absent in Netflix's catalog. However, population alone or a country's relative wealth may not be a sufficient indicator to predict inclusion either, for Chile, Paraguay, and Perú are also underrepresented in Netflix's catalog. Then, if the profitability of a national market, nor the quality and characteristics of its products, can explain their exclusion, the matter could potentially be ingrained at the strategic level. Indeed, African, Asian, and European countries are similarly left out of Netflix's regional catalogs. Netflix would seem to favor internationalization strategies where they license some local content, or shoot in regional locations, to attract users who they plan on keeping with American content. This contrasts with other SVOD providers' strategies, like Amazon Prime Video, a company that bets on specific national markets and develops content more tailored to these, for that approach generates positive externalities for other business units under their corporate banner.

Nevertheless, we do not abandon content analysis entirely, even if it explains the exclusion of national films only partially. We are interested in understanding the characteristics of Netflix's original audiovisual products to analyze how the transformations in the supply can affect local audiences and, eventually, the content they demand from their national producers. With that goal, we built a content valuation table following some of the criteria put forth by Kübler et al. (2020), using data from the surveyed sample and Filmaffinity, which we present below.

The genres we present in Table 3 are the most commonly found on Netflix, based on our content analysis. We can see that comedies are less frequent in Bolivian films than their Netflix counterparts. The average length of Bolivian films is also shorter, which could be an effect of the numerous documentary features produced in the period with run times between 40 and 70 minutes.²³ The audience share of Bolivian films in

²³ Some examples, included in our data set, are: *Compañía* (2019, 60 min.), *Mar negro* (2018, 61 min.), *En el murmullo del viento* (2018, 61 min.), *Cómo matar a tu presidente* (2018, 60 min.), *Días de circo* (2018, 65 min.), *El rey negro* (2017, 68 min.), *Fuera de campo* (2017, 60 min.), *Nana* (2016, 65 min.), and *La última navidad de Julius* (2015, 48 min.).

TABLE 3
 CONTENT VALUATION FOR LATIN AMERICAN AND BOLIVIAN FILMS RELEASED BETWEEN 2015 AND 2020, AVAILABLE ON SVOD

	Genres	Average Length	Festival Participation	Average Audience Rating	Average Viewers in the Sample	
Netflix	Documentary	17%	92 minutes	30%	5.8	8.90%
	Drama	50%			(1.02)	(10.3)
	Comedy	34%				
Third-party	Documentary	20%	92 minutes	80%	6.7	6.75%
	Drama	40%			(1.03)	(4.8)
	Comedy	40%				
Bolivian	Documentary	20%	84 minutes	100%	5.8	6.90%
	Drama	70%			(0.3)	(4.4)
	Comedy	10%				

Source: The authors.

our sample is marginally higher than the one for Latin American films not produced by Netflix. It is also interesting to see that the average audience rating for Bolivian films and for Netflix originals are equal, with a greater variability in the case of Netflix. The literature shows that user and expert reviews are a good quality signal for films (Basuroy et al. 2003; Hennig-Thurau & Houston, 2019). Then, we could say that a difference in the perceived quality of Bolivian films is not one of the reasons behind its low representation in Netflix's catalog. However, this quantitative approach may fail to consider other differences (thematic disparities stemming from idiosyncratic sensibilities, humor that plays on regional stereotypes and local idioms, etc.) and admittedly draws from a sample that due to its proximity to film researchers and producers could have particular valuations for the works created by national artists.

Moving now to the potential impact of Netflix and international digital video distribution, in light of the evidence we have found, it cannot be said that Bolivian film production has been affected as a "national cinema". If we consider the prevalence of Bolivian and/or historical narratives in the content analysis, following Higson's definition (1989) this is still a film production that gazes inward to analyze its present and past, while reasserting its otherness in relation to other countries. Nonetheless, we cannot generalize these findings to the rest of Latin America or even those with smaller film industries, for Bolivian movies are not available on Netflix nor are there Bolivian-produced Netflix originals, which limits what we can say about the effect of Netflix on other countries' "national cinemas". However, we can provide some insights on this direction, considering that the concentration of Netflix original content around certain themes and narratives (family comedies, melodramas, TV-style documentaries), as evidenced in the word-frequency charts of Appendix N° 7, could imply that there is less diversity in its catalog than in third-party licensed content or Bolivian films. A country-specific comparison like the one carried out here for Bolivia and its content inside and outside SVOD platforms may offer additional insights for other Latin American cases.

Regarding the channels these films use to find their international audiences, it is telling that all Bolivian releases included in the audience

survey participated in at least one international film festival. Only 30% of Netflix original films participated in them, while 80% of the third-party content it licenses did. This could be a signal that Latin American production companies use festivals and their adjacent film markets to reach distributors such as Netflix. However, the fact that no Bolivian films are available on Netflix hampers this reasoning, linking back to the conjecture of strategic motives behind the absences. The exclusivity of these channels can be a factor in the diversity of Netflix's catalog, too. Not all film productions can go to festivals nor do Netflix acquisition agents attend all festivals, which themselves have particular programming policies and criteria. International film distribution is far from being a competitive market where simply matching standards and cultivating audience tastes can guarantee participation. This is a line of research that deserves exploration, involving themes such as the cultural selectivity of programmers and the industrial logics of Hollywood and other institutions (Crofts, 1993).

On the side of domestic distribution, the programming choices of the DSPs are not trivial. Over 75% of our sample claim not to have decided what to watch before they access the streaming platform. Furthermore, Latin American films available on Netflix were more frequently watched by our sample than those not available on SVOD. This sounds obvious but carries implications for the diversity of the content being offered to the audiences, particularly when the global trends point towards a consolidation of DSPs over theatrical distribution. Digitization had already accelerated these processes, prompting policymakers to search for "ways to defend and incentivize, through policy and public-private partnerships" (Albornoz & García Leiva, 2017a), inclusivity and diversity in the cultural industries. This to make sure that the content involves "differences, variety, balance and disparity in terms of values, identities and aesthetics... reflecting the multiple groups living in a society" (Albornoz & García Leiva, 2017b, pp. 31-32), allowing citizens not only to access and choose from them, but also to create, distribute and share these contents. National quotas and incentives to production have proven successful in increasing the participation of certain countries in SVOD platforms' catalogs, but to be successful such policies need to bank on their national film industry being ready to

step up and fill the demand, a process where understanding the content characteristics favored by Netflix, as proposed by our study, can be advantageous.

LIMITATIONS

This study is framed by the fluctuating and localized nature of Netflix's catalog. To be precise, the information on the films and series available on the platform only reflects the case of Bolivia in early December, 2020. New content is being added on a regular basis, some other is removed, and even regional markets face copyright limitations to international distribution. This limitation has been noted in previous works and calls for the creation of a global network of scholars to collaborate in transnational analyses of the content. Our work takes a first step in that direction.

Another limitation comes from the sizes of the regional and national subsets of the catalog. There are more films from the whole of Latin America than from any single country, which makes comparisons difficult. One could pick equal-sized samples from each subset, but the trade-off there would be with the analytical power of quantitative analyses of qualitative content, for there would not be enough data to reach information saturation.

Similarly, there are no Bolivian films on Netflix as of December, 2020, which requires us to pool Bolivian releases from other SVOD platforms to establish a comparison. Given the descriptive, exploratory nature of this work, we consider this to be an adequate proxy. Furthermore, several of the third-party owned films available on Netflix could also be streamed in other platforms in the past (or even right now) in the country. Consequently, Bolivian films as a whole are proportionally overrepresented in our sample, in relation to the actual size of the Bolivian film industry. Dealing with these asymmetries demands a nuanced approach, considering the relative size of the Bolivian film industry in terms of the production and consumption of content, before leading to more robust conclusions.

CONCLUDING REMARKS

One of the aims of this work was to offer some key elements to understand the challenges that internationalization and digital distribution bring for small film industries. Our results align with the emerging literature on this subject, finding that the presence of Netflix and other SVOD platforms is reshaping entertainment consumption. Namely, that Netflix has become the main channel for Bolivian audiences to access Latin American films, as well as a broader catalog of content. On the side of production, we find that Bolivian films possess some characteristics such as a focus on national and historical themes, regional humor in their comedies, and non-traditional approaches to their documentaries, that distinguish them both from regional Netflix original films and licensed Latin American content. Some of these disparities could explain why there are no Bolivian films or series on Netflix to date.

According to our findings, Bolivian audiences are following the global trends, consuming audiovisual content primarily from home, often restricting their choices to what is available on the streaming platforms they already subscribe to (even if it is not entirely clear how much of a role recommendation systems play). Considering these behaviors and what our non-probabilistic sample reports, we can say that these audiences watch few Latin American or Bolivian films. When they do, they more often watch those that benefit from the audience and media buzz Netflix original productions can afford (*La casa de las flores*, *Roma*) or older third-party content licensed by Netflix (*Yo soy Betty, la fea*). The proportion of consumers who watch a Latin American films on Netflix is higher than that of those who watch in other channels (movie theaters, festivals). Hence, not being on Netflix could handicap the capacity of finding international audiences for a Latin American or Bolivian film.

Although we look at the 2015-2020 period, our work does not propose a longitudinal study. Hence, we are unable to discuss transformations in the content, narratives or genres of Latin American audiovisual products potentially due to the influence of Netflix. Nonetheless, even if their catalog seems to be diverse, with a representation of many Latin American countries, our analysis shows

that these products fit a quite specific profile, with a predominance of classical genres (drama, comedy, documentaries), structures (mainly narrative content, often serialized) and themes (family or male-centric stories, urban narratives). The concerns this raises in terms of diversity are not unfounded. Future works may bring attention to how “national cinemas” and local cinematic specificities can survive and find their own spaces in highly homogenized and globalized markets.

APPENDICES

All the appendices are online-only and can be found [here](#).

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