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# **Impact of the COVID-19 Pandemic on Media sustainability in Latin America**

**Changes and Transformations in the  
Production Models, Sources of Income,  
and Products of Latin American Media**



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# **Impact of the COVID-19 Pandemic on Media sustainability in Latin America**

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Production Models, Sources of Income,  
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## Introduction

The dimension of the economic crisis derived from the coronavirus (COVID-19) pandemic is still difficult to estimate. Latin America is the region where this crisis had—and still has—the strongest impact. The media market is not the exception to these negative numbers and, after years of gradual losses of income (especially in companies related to journalistic production), 2020 was a major blow to the industry.

This study examines the effects of the pandemic on the business models and the sustainability strategies of Latin American media. The text includes an analysis of the sources of income, the crisis in

the advertising market and the decisions that have been taken, by the commercial private media, in terms of income models and the new ways to reach their audiences at times of major transformations in social habits and uses.

Additionally, the study also includes a section describing the actions of the state and community media, which played a critical role in the accessibility and universality of access to crucial relevant information. The study concludes with a look at the policies adopted by Latin American countries to meet, or not meet, the needs of the media industry.

## Section 1. Advertising Market and Impact on Commercial Media

Significant changes have been registered in habits and uses in relation to the media during the pandemic. The relationship between these changes and the media volume of business or ability to earn income was proportionate but not direct. Especially during the first four months of more restrictive social isolation in Latin America (March, April, May and June) in 2020, the media outlets increased their vocation to inform.<sup>1</sup> TV news programs played a prominent role at home, although, according to viewers, they are considered “sensationalist and biased”, and with more opinions than information. For young people, linear consumption of TV was not attractive. Radio, on the other hand, had lower penetration but higher levels of trust; it had a higher informational value in Brazil and Mexico, whereas its role in Colombia and Argentina was more tied to entertainment and accompaniment. Among the different types of media, print media was the most affected by quarantines. It is a deep-rooted habit among older people, who make a ritual out of their consumption of news and value the deepness of the stories.<sup>2</sup>

Beyond growth and centrality in the access to news and entertainment content during the different

stages of isolation and social distancing, the media economy was severely impacted by coronavirus.

The economy of the media and culture system was severely impacted by the COVID-19 pandemic worldwide. According to PriceWaterhouseCoopers (PWC) data, 2020 shows a decrease in revenue along the industry caused mainly by the advertising market downturn. Revenue was lower than in 2018, when the total amount exceeded US\$2,000bn for the first time. The global business registered a 6% decrease (approximately US\$120bn), which implies losing the 4.7% growth achieved in 2019. Estimates suggest that the industry will have to wait until 2022 to recover lost ground.<sup>3</sup>

PWC's data acknowledge that in Latin America the circulation of the print media has suffered a 16.5% decrease in 2020, which will not be recovered in the next few years. TV advertising market has also registered a fall of more than 10% in pay TV and open channels, although digital revenue remained constant. In the audiovisual segment (between advertising revenue and subscriptions to pay TV services) the only increase during the year of the pandemic was in the OTT platforms (such as Netflix) sector (20%). Another sector which has not stopped growing in spite of the general downturn was digi-

1 Digital News Report 2020”, by the Reuters Institute and the University of Oxford. Available at:

<https://www.digitalnewsreport.org/survey/2020/overview-key-findings-2020/>

2 “Consumo y pago de noticias digitales: oportunidades y desafíos del modelo de suscripción en América Latina”, available at: <https://luminategroup.com/storage/985/Reporte-Consumo-y-Pago-de-Noticias-Digitales-Regional-%28ES%29---Luminate-2020.pdf>

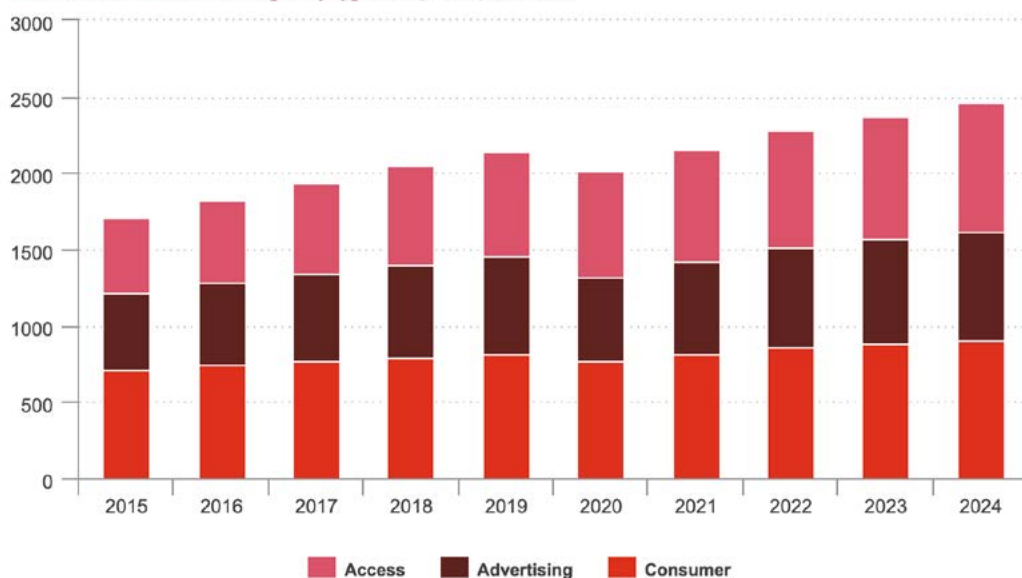
3 Global Entertainment and Media Outlook 2021. PWC. Available at:

<https://www.pwc.com/gx/en/industries/tmt/media/outlook/segment-findings.html>

**Figure 1. Global Income of the Media and Entertainment Industry in Billions of Dollars (2015-2024)**

*Advertising will be hit the hardest by the pandemic*

Global, total E&M revenue split by type, 2015-2024 (US\$bn)



Source: Global Entertainment & Media Outlook 2020–2024. PwC. Omdia

Source: Agencia PWC

tal advertising, which in Latin America maintained a US\$6bn turnover in 2019 and 2020.<sup>4</sup>

The advertising market as a whole has declined by 10.2% across all media and platforms, according to WARC's data.<sup>5</sup> However, sectors related to online advertising showed an increase even in 2020: social media (9.3%) and online video (7.9%). Advertising displayed in browsers (-1.9%) and online classified ads (-14.2%) did show a decrease. But these percentages are below those registered by traditional media. While TV has lost 16.1% of its advertising, radio decreased by 18.4%, magazines by 25.4%, and newspapers by 25.5%. Logically, advertising in cinemas and on public roads has showed the greatest decline. However, the bad news does not stop there, as the pandemic appears to have taken too much of a toll on traditional media to recover in the short-term: Only for radio is a significant recovery projected in 2022 (4.6%).

According to WARC's data, Latin American countries have been the most adversely affected by the advertising market downturn. Venezuela has been most adversely impacted, along with Brazil and Argentina. Chile, Ecuador and Colombia are among the countries that have been less affected by the crisis.

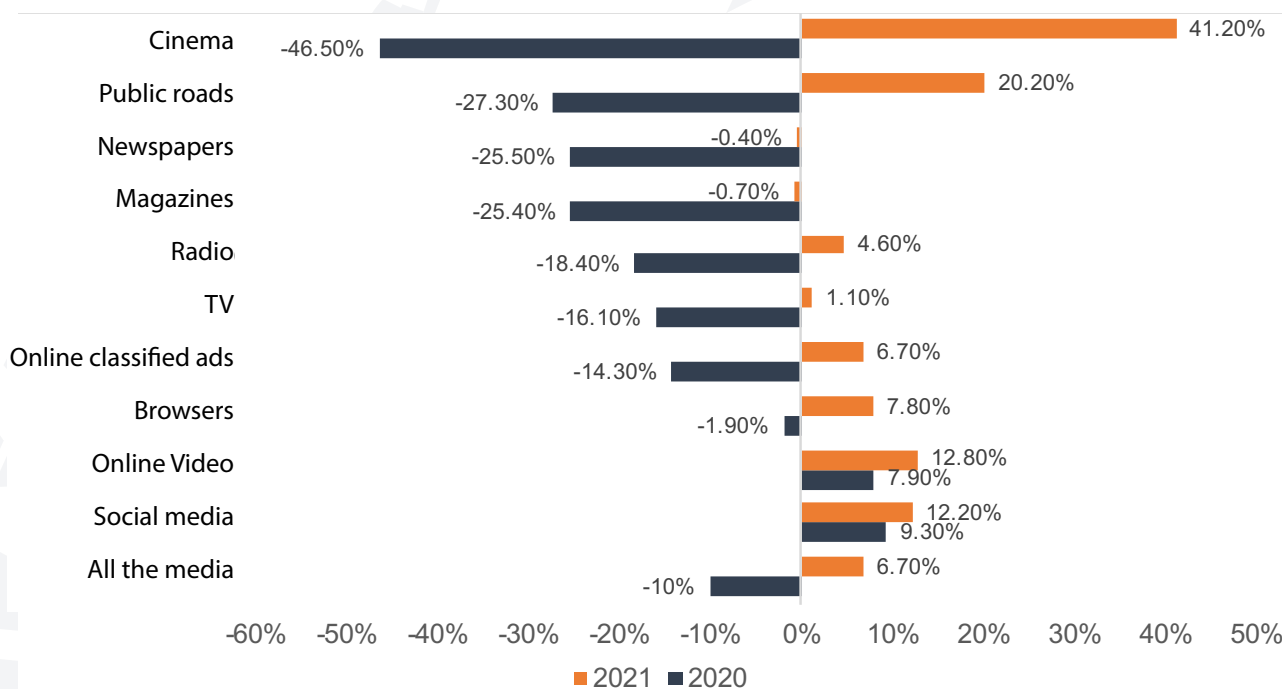
Beyond these critical numbers that suggest a major setback in the Latin American market compared to other regions in the world, the digital advertising market shows encouraging numbers. Six out of the ten countries in which advertising turnover has increased the most are Latin American countries. Colombia (11.2%) is the country that has showed the greatest year-on-year growth, with Chile (5.9%) and Brazil (5.2%) completing the worldwide podium. Argentina (4.4%) and Mexico (4.1%) are in the 5th and 6th place, respectively, while Peru (2.4%) is in the 10th place, with a score equal to the global average.<sup>6</sup>

4 "Impacto del COVID-19 en el sector de media e internet", by Comscore and Statista. Available at: <https://www.comscore.com/lat/Prensa-y-Eventos/Presentaciones-y-libros-blancos/2020/Impacto-del-COVID-19-en-el-sector-de-media-e-internet>

5 "The Publisher's Guide to Navigating COVID-19", by the University of Oregon. Available at: <https://whatsnewinpublishing.com/the-publishers-guide-to-navigating-covid-19-report-download/>

6 "Global Ad Spend Forecasts. January 2021", Dentsu Agency. Available at: [https://assets-eu-01.kc-usercontent.com/7bf8ef96-9447-0161-1923-3ac6929eb20f/e81fba48-540d-48b8-b793-d9785212525e/Adspend\\_Report\\_2021\\_2001\\_int.pdf](https://assets-eu-01.kc-usercontent.com/7bf8ef96-9447-0161-1923-3ac6929eb20f/e81fba48-540d-48b8-b793-d9785212525e/Adspend_Report_2021_2001_int.pdf)

**Figure 2. Comparison of the Global Advertising Investment in the Media between 2020 and 2021**



Source: WARC Agency

This growth is driven by display<sup>7</sup> advertising, which accounts for 57.2% of the digital turnover in these Latin American countries. This is the most traditional advertising: static banners, rich media<sup>8</sup>, sponsoring campaigns, pre-roll videos and audios.<sup>9</sup> This sector accounted, for example, for 76.9% of digital advertising in Peru and 67% in Mexico and Colombia. Ads in browsers represented 37.8% of the total turnover in this region, being more important in the Argentine (42.5%) and Brazilian (43.4%) markets.

Based on the data generated by Mercado Libre<sup>10</sup>, the digital advertising market in Mexico, Brazil and Argentina has a US\$9bn share (in 2020). According to this same source, Google and Facebook concentrate 68% of the advertising turnover in the Internet. Thus, the COVID-19 pandemic impacts the advertising business of the media in two ways. Not only the advertising pie to be shared is smaller and it will take time for it to get back to its usual size, but

the increase of the investment in digital platforms means that this money is increasingly captured by the digital giants.

This phenomenon also occurs —and even more deeply— in non-Latin American markets. In the United States, for instance, Facebook and Google accounted for 53% of the total digital advertising turnover in 2020, but Amazon has a much bigger presence there than in our region, and accounted for 9.5% of the total.<sup>11</sup> The sum of these three actors confirms the triopoly's projection of the digital market that hinders news and content producers' access to this segment of the business.

By specifically analysing the impact of the pandemic in Google, it can be found that advertising turnover only decreased during the second quarter of 2020, when its revenue was reduced by 8% year-on-year. The first and third quarter of the year saw

7 Display advertising is advertising that is inserted in a website in the format of a banner, fixed images, or images combined with some text.  
 8 Rich media formats are those formats that are inserted in a website, but in a dynamic way, including video or audio, and they can be mobile or appear when opening a particular section.  
 9 Pre-roll ads in audio or video format are those that appear before the user begins reproducing the selected content (either audio or video).  
 10 "El rol de los marketplaces en la construcción de marca". Available at: <http://www.marketersbyadlatina.com/articulo/7090-en-awareness-mercado-libre-es-un-244%25-mas-eficaz-que-otros-medios->  
 11 "Google's US Ad Revenues to Drop for the First Time". Available at: <https://www.emarketer.com/newsroom/index.php/google-ad-revenues-to-drop-for-the-first-time/>

an increase of 10%, while the fourth quarter registered a 22% high in advertising turnover growth.<sup>12</sup> Facebook did not register any quarter with year-on-year reductions in advertising revenues. The fourth quarter of 2020 marked a 40% increase in advertising.<sup>13</sup> As it can be noted, the numbers are very different from the content production and media system.

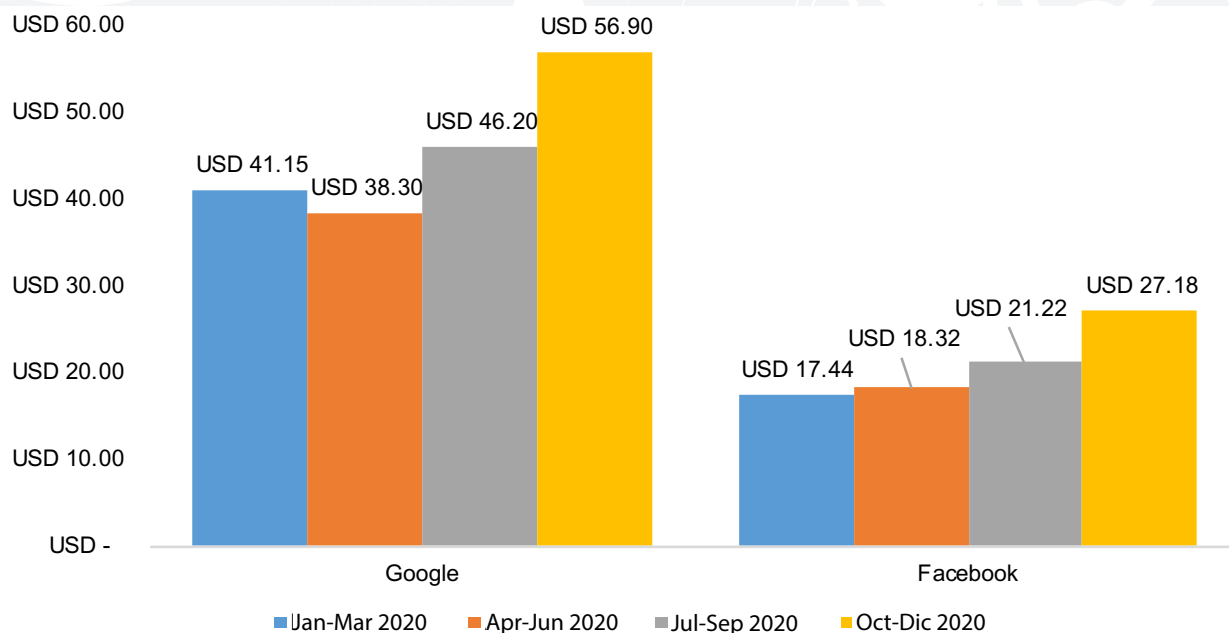
The advertising segments that have reduced their advertising budget the most include the automotive industry, retail trade, tourism and culture in general. In March and April, the closure of companies and premises led to a great halt in the advertising activity and many campaigns were cancelled. In order to adjust to the “new normal”, many big advertisers (such as telephone companies, laboratories or big retailers), redirected their budgets towards corporate communication and corporate social responsibility campaigns.

The impact of the advertising market downturn on media finances depends on the level of diversification of each company. Considering this scenario, news portals’ producers increased (or accelerated) their subscription models in order to substitute some revenues with others.

The revenue models of the press through digital readers’ subscriptions faced a major challenge during the pandemic because, although access to information, stories and content was massive, the media had to find ways to turn that into money.<sup>14</sup> This has put on the table the dichotomy of building paywalls and limiting access in times of great increases of clicks or *looking for advertising revenue leveraged on the volume of visits*. According to Cerezo, four models of revenue directly from readers were set out:

1. Models of partial openness: A mixed model where basic information on the pandemic can be freely accessed, while more specific and in-depth stories are kept behind a

**Figure 3. Google and Facebook Global Income during 2020, in Billions of Dollars**



Source: Developed by the author

12 Report on Alphabet Inc’s Revenues Reported to NASDAQ. Available at: <https://news.alphastreet.com/alphabet-google-q4-revenue-jumps-23-on-search-power/>

13 Facebook Official Report on Earnings. Available at: [https://s21.q4cdn.com/399680738/files/doc\\_financials/2020/q4/FB-Earnings-Presentation-Q4-2020.pdf](https://s21.q4cdn.com/399680738/files/doc_financials/2020/q4/FB-Earnings-Presentation-Q4-2020.pdf)

14 “Consumo y pago de noticias digitales: oportunidades y desafíos del modelo de suscripción en América Latina”, available at: <https://luminategroup.com/storage/985/Reporte-Consumo-y-Pago-de-Noticias-Digitales-Regional-%28ES%29---Luminate-2020.pdf>



- paywall that offers promotions to increase the number of readers;
2. Models in which COVID-19 is an incentive: Other media have decided to open all the pandemic coverage to their free readership, while inviting to a subscription in order to have access to the stories on other issues as a way of promoting the activity;
  3. Replacement of the paywall with the register wall: COVID coverage is offered after registering, but it is not payment-mediated. The objective is to generate trust in the readers so that they would become pay clients.
  4. Maintenance of the paywall: News is maintained with a subscription-mediated access even in the stories related to the pandemic.<sup>15</sup>

In some special cases, media such as La Nación (Argentina), El Espectador (Colombia), El País (Uruguay), or Estado de São Paulo (Brazil), have expressed that they had not changed their subscription model regarding access to stories or services, although they had redesigned the promotion plans so as to make them more accessible to readers. In this way, they sought to turn the surge of visitors during the first weeks of quarantine into an increase of “clients.”<sup>16</sup>

## Section 2. Productive and Labour Changes

The health emergency, the economic transformation and the new social environments resulting from the pandemic, have accelerated the digitalization processes of media companies and their productive organizations. On the other hand, these changes brought about new labour situations that altered working conditions and sparked new conflicts between the unions related to the activity, the employers and the State.

### 2.1. Changes in the Productive Organization

One of the main aspects of these changes is the decentralization of the work of the journalists that, due to the restrictions, had to leave the newsrooms to start working from home.<sup>17</sup> One of the changes that many entrepreneurs say they will maintain once the pandemic is over involves, precisely, the flexibilization of the workers’ obligation to be present in physical locations, along with a greater use of digital platforms when carrying out the work. This not only implies the already classic model of remote CMS<sup>18</sup>, but also newsroom or sections meetings outside the traditional places and new forms

of hiring. Decentralization and delocalization were two key words during the pandemic for media workers and managers in Latin America.<sup>19</sup>

This productive transformation that reduces the costs for companies, while increasing them, in many cases, for workers, who have to make sure they have a connection service and the necessary equipment to carry out their work, involves a series of labour threats. First, as it was already mentioned, if companies do not make a greater investment in technology (not only in management software, but also in equipment), workers will be responsible for having the necessary equipment and conditions to carry out their work.

It is indeed very interesting to hear the words of the director of a Caribbean regional media outlet, who states that virtuality impacts press freedom and the access to sources and public information: “virtuality is very impersonal; you cannot reach officers in the same way; they do not make statements; there are less press conferences and when these take place, you cannot ask easily because they do not

15 “El impacto de la pandemia en la prensa” by Pepe Cerezo”. Available at: <https://www.apmadrid.es/wp-content/uploads/2020/04/dosier-evoca-09-medios-y-coronavirus.pdf>

16 Statements taken from the story “Suscripciones digitales en América Latina: datos y conocimiento del usuario, claves en el éxito del “reader revenue””, by Laboratorio de Periodismo. Available at: <https://laboratoriodeperiodismo.org/suscripciones-digitales-en-america-latina-datos-y-conocimiento-del-usuario-claves-en-el-exito-del-reader-revenue/>

17 “COVID-19 and the media and culture sector” report by the International Labour Organization (ILO). Available at: [https://www.ilo.org/sector/Resources/publications/WCMS\\_750548/lang--en/index.htm](https://www.ilo.org/sector/Resources/publications/WCMS_750548/lang--en/index.htm)

18 A CMS (content management system) is a software that generates an interface para to manage digital contents and portal designs in the same system, thus allowing for joint, networked and simultaneous work by programmers, editors, writers, and managers in order to develop a digital product, usually a website.

19 “The impact of COVID-19 on Journalism in Emerging Economies and the Global South”, by Thomson Reuters Foundation. Available at: [https://papers.ssrn.com/sol3/papers.cfm?abstract\\_id=3796666](https://papers.ssrn.com/sol3/papers.cfm?abstract_id=3796666)

let you ask if they do not want to answer, let alone cross-question them. You have to settle for the mayor's office newsletter, and that is not enough guarantee for information, nor for information freedom".<sup>20</sup>

In a survey carried out between media executives worldwide, 55% say they are concerned about the impact that remote work could have on their employees' creativity and productivity. 77% said that teleworking had complicated interpersonal relationships in newsrooms, while internal communication and the employees' mental health are central issues to be addressed. Beyond this, half of the surveyed executives said that their companies' plans include the reduction of fixed workspaces in order to support a model of hybrid newsrooms that combine working in the office, working in the streets and working from home. This model appears in the horizon as one of the main legacies of the pandemic for journalism and its productive organization.

The pandemic has accelerated the digital transformation processes of the media, mainly those coming from the print media, and digital portals have become the main product of the regional news centres. Cost savings (and quarantines) have led, for example, to the suspension of travels and coverages abroad. With its proven effectiveness and good results, this practice is likely to continue beyond COVID-19. On the other hand, there is a boom in digital products and project management tools, along with networked organizational models that rely on a (increasingly reduced) core of permanent employees and journalists that are inspired by and diversify from specialized journalists, experts, researchers and technicians outside the productive organization, who are outsourced and add value to the final product. The figure of the "product manager" has greater value and hierarchy in these "networked" organizations.

The list of newspapers that have stopped printing as a result of the pandemic is extensive. For instance, in Mexico, *Récord* newspaper, *Crónica* editions in Jalisco and Hidalgo, and *El Economista* have stopped issuing their paper editions. In Uruguay, *El*

*Observador* discontinued its printing editions from Monday to Friday. In Bolivia, *Los Tiempos*, *Página Siete* and *El Deber* have also changed their printing policies. In Brazil, *Globo* stopped printing six of its magazines, while in Colombia, *Publimetro* has also stopped issuing its printing edition. *La Discusión* and *Publimetro*, of Chile, are also part of the list.

## 2.2. Changes in Labour Conditions and Conflicts

In a survey of Latin American press workers, 70% indicated their bosses had no idea how to manage labour concerns generated by quarantines (for example, they did not offer flexible schedules, they increased their workload, and there is a lack of humane treatment). There is also a lack of concern or attention to physical or psychological problems arising from the new situations of daily and working life. Additionally, those workers who had to cover the different battlefronts against the virus said that their employers did not provide them with adequate protection to prevent infection. 45% of the press workers surveyed said that they were not given a mask to protect themselves when covering the situation in the streets.<sup>21</sup>

Regarding labour, unions face great problems when it comes to discussing labour conditions, making demands and participating in joint meetings with employers. Digitalization and decentralization of labour also had an impact on the union strength of press workers. This report shows that in many cases, the business sector showed hostility and prevented solidarity among workers. An example of this is the refusal to provide information on the number of colleagues who were sick or infected with COVID-19.

It was also found that in most of the countries, state action collaborated with the precarious practices of employers by failing to control activities. The main measures taken by companies were remote work or teleworking, despite the fact that this form of practice is not regulated in the majority of Latin American countries. Thus, employers felt free to charge costs to their employees and to disregard health

20 "Periodistas en pandemia: El virus de la indiferencia", by FELCOPER, IFJ and Union to Union. Available at: <https://fecolper.com.co/wp-content/uploads/2021/02/PeriodistasEnPandemia.pdf>

21 "Un análisis sobre las relaciones laborales de lxs trabajadorxs de prensa y medios de comunicación de América Latina y el Caribe en el nuevo contexto de la pandemia", by Friedrich Ebert Stiftung Argentina and the International Federation of Journalists. Available at: <https://www.ifj.org/media-centre/news/detail/category/press-releases/article/un-analisis-sobre-las-relaciones-laborales-de-lxs-trabajadorxs-de-prensa-y-medios-de-comunicacion-de.html>

measures and care, as well as to implement new forms of hiring.

Although, according to the main press unions in Latin America, most of the workers have a contractual relationship with their companies, labour instability of those workers in more precarious situations increased during the pandemic. One of unions' greatest fears is that those workers that were sent to work from home are not called to work in physical places anymore. Unions, on the other hand, claim that they were unable to negotiate working or salary conditions while plant reduction procedures were further developed (with a pre-pandemic trajectory). Employers used temporary layoffs, early retirements, dismissals with double compensation, reduced working hours, shift rotation, or partial salary payments to burden workers with the costs of the crisis across the continent.

Journalists' opinions can be used to infer the negative impact on labour conditions. The International Federation of Journalists (IFJ) conducted a global survey of more than 1,300 journalists in April 2020, and 65% of the respondents said that the pandemic had worsened their labour conditions, their salary and their labour security. This is even worse among freelancers or independent journalists, since almost all of them said that they had lost income and working opportunities. On the other hand, 60% of the respondents acknowledged that their levels of stress and anxiety had increased due to this new and strange situation.

The numbers of the labour crisis in the Latin America media speak for themselves: the Uruguayan Press Association reported 350 layoffs in the entire sector in mid-2020; in Chile, more than 900 jobs were lost in radio, TV and print media; the Journalists' Union of Paraguay reported 300 dismissals as of May 2020; in Peru, the National Association of Journalists reported 400 job losses after the pandemic; Fundamedios reported 600 layoffs in Ecuador; National Federation of Journalists of Brazil reported 205 layoffs and almost 4,000 workers had their salaries reduced.<sup>22</sup>

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22 Information from Convoca (<https://convoca.pe/agenda-propia/covid-19-periodistas-de-latinoamerica-entre-condiciones-precarias-despidos-contagios>), Cuestión Pública (<https://cuestionpublica.com/el-coronavirus-deja-a-la-prensa-en-cuidados-intensivos/>) and Latam Journalism Review (<https://latamjournalismreview.org/es/articles/periodistas-latinoamericanos-enfrentan-despidos-masivos-y-falta-de-proteccion-sanitaria-para-cubrir-pandemia-de-covid-19/>).

## Section 3. New Information Products and

### New Forms of Reaching the Audiences

The rising demand for information content and new consumption habits, which are directly tied to mobile devices and Internet connections, have not only altered the media's productive structure and business models, but also their products. As previously mentioned, there is a long list of media outlets that no longer publish print editions. In contrast, it is worth highlighting the emergence of new information products in digital format to show the acceleration of the convergent adaptation process of the continent's main journalistic producers.

The main product strategies that were reinforced or launched during the COVID-19 pandemic in information media include newsletters for different platforms: newsletters for subscribed readers (payment-mediated or not); improvement of the emerging alert systems for mobile apps (also known as pop-ups); development of messaging groups in Telegram and WhatsApp; data and information verification services, and podcasts' production.<sup>23</sup>

Twitch was one of the platforms that grew the most during the quarantines in Latin America, with live broadcasting of contents for young people aged 10 to 35. Twitch has more than 15 million active users in Argentina, Brazil, Chile, Colombia and Mexico.<sup>24</sup> El auge de los streamers tuvo su capítulo latinoamericano y los medios tradicionales no tardaron en prestarle atención y diseñar estrategias de contenido para estar presentes. Viacom, la empresa estadounidense de producción de contenidos para televisión en todo el continente, selló una alianza para retransmitir allí los contenidos infantiles de Nickelodeon. El diario deportivo Olé, de Argentina, comenzó las transmisiones del Fornite Champions Series por esa plataforma con grandes resultados en audiencia.

The boom of streamers had its Latin American chapter and the traditional media soon began to pay attention and design content strategies to be present. Viacom, the US company that produces TV content in the whole continent, established an alliance to broadcast Nickelodeon's content for

children. Olé, the Argentinian sports newspaper, began broadcasting the Fortnite Champions Series through that platform with great audience results.

In the same way, TikTok is a social network that has been socially used for a longer time than Twitch, but which has a similar audience profile and its use has greatly increased during their pandemic. Its contents face the great challenge of adjusting to an environment where entertainment and challenges are the rule. This platform offers immense potential for virializing audio-visual content and emphasizing the significance of particular public-interest information or news in quick and concrete terms. Some of the continent's historical newspapers, Folha and Clarín, for example, have their own channels in this network, albeit with behaviours that are more marketing-related than information-related. TV channels such as Telefe or Canal 13 of Chile have a more active presence, as do radio stations with a younger demographic, such as Los 40 or Jovem Pan, that show not only their programming contents, but also behind-the-scenes footage of their productions or interviews with the protagonists.

The year 2020 confirmed an increase in podcast output in the region. According to Voxnest, podcast production in Spanish grew by 94% year-on-year, with Brazil as the country that registered the highest increase worldwide, and Colombia and Mexico among the 10 countries with the greatest increase. Latin America has 5 of the 10 countries in which podcast listening has increased the most: Colombia (3rd place), Argentina (4th), Brazil (5th), Chile (9th) and Mexico (10th). In this area, it is worth noting the emergence of daily news podcasts and information summaries in major news outlets such as Infobae, Folha, El Tiempo, El Mercurio, and La Nación, both in the morning and afternoon. Spotify has upped its production investments in the continent, consolidated its "El Café de la Mañana" franchise with local media, and worked with big journalistic brands to create its "Ruta Diaria" service, which combines news podcasts with music, in Mexico, Brazil, and Argentina. Production companies such

23 Casero-Ripollés, A. (2020). "La COVID-19 en el periodismo: un impacto ambivalente", RAEIC, Revista de la Asociación Española de Investigación de la Comunicación, vol. 7, number 14, 2-26. Available at: <https://doi.org/10.24137/raeic.7.14.1>

24 Information provided by Gabriela Loyola, Twitch Sales Manager in Mexico. Available at: <https://plataformas.news/new-media/nota/twitch-duplica-su-audiencia-en-america-latina>

as Así Suena (Mexico), Posta (Argentina), Radio Ambulante (United States), La No Ficción (Colombia) and Emisor Podcasting (Chile) have increased their daily and regular productions with a strong focus on contents related to the pandemic.

The introduction of Google News Showcase in Brazil and Argentina (and soon in Colombia) stands out among new products, methods of reaching consumers, and generating new revenue streams. This platform to access news and information is laun-

ched with an agreement that includes a hundred or so of media from both countries through which they will receive money so that Google uses their news in this platform.<sup>25</sup> All the media that were convened belong to big profit-making journalistic corporations. The technology giant has also launched an emergency assistance fund to help local media during the first wave of the pandemic, which benefited 1,050 organizations from the whole continent with incentives from US\$5,000 to US\$85,000.<sup>26</sup>

## Section 4. Impact on Public and Community Media

The vast majority of Latin American public media have worked as important aids to the educational system, which has been compelled to close schools and use distant learning practices. In this context, state-owned radio and television stations collaborated with the ministries of education, culture, and communications in general to create another channel for reaching out to students with educational content. These policies were developed especially for the most economically disadvantaged children in terms of access to devices and Internet networks, as well as for those who resided in places with low or poor connectivity.

In Argentina<sup>27</sup>, one of the first measures taken by the government was the launch of a program called “Seguimos Educando” (We Continue Educating), implemented by the Ministry of Education, the Ministry of Culture and the state-owned media. In addition to a portal for access to educational services, the initiative entailed the creation of radio and television programs aimed at different school years of basic and secondary education, that broadcasted on the public channels Encuentro, Paka-Paka, DeporTV, and Televisión Pública, as well as on the National Radio network’s more than 40 stations. In total, 14 hours of educational programs were broadcasted daily on channels and stations that depend on the Secretariat of Media and Public Communication, and 7 hours were broadcasted on the radio. Each of the classes/programs had a tea-

cher and a presenter (journalist or artist) who worked with the educational material available.

In Chile, the pandemic prompted the development of the TV Educa channel, which was intended to support the remote education process accelerated by COVID-19. The channel, which broadcasted through digital signal, was intended to be broadcasted for just a few months, however, had to be prolonged due to the duration of social isolation and school closures. It delivered entertainment, educational, and cultural programming, as well as programs with content designed specifically for schools that corresponded to the curricula of the first through fourth grades of primary school (in Mathematics, Language, History and Natural Sciences). The channel was established as a collaborative effort between the public and commercial media, as well as the Chilean Ministry of Education, to develop and transmit programming generated by the public and private channels, as well as independent production businesses. TV Educa will become a cultural station in 2021, according to plans.

In Colombia, Radio Televisión Nacional Colombia (RTVC) has also developed a remote education program in collaboration with the Ministry of Education. The program “Profe en tu casa” (Teacher at home) was one of the few examples that were distributed to different regional channels throughout the country. Although it is not a program with an exclusively curricular content, it was launched to

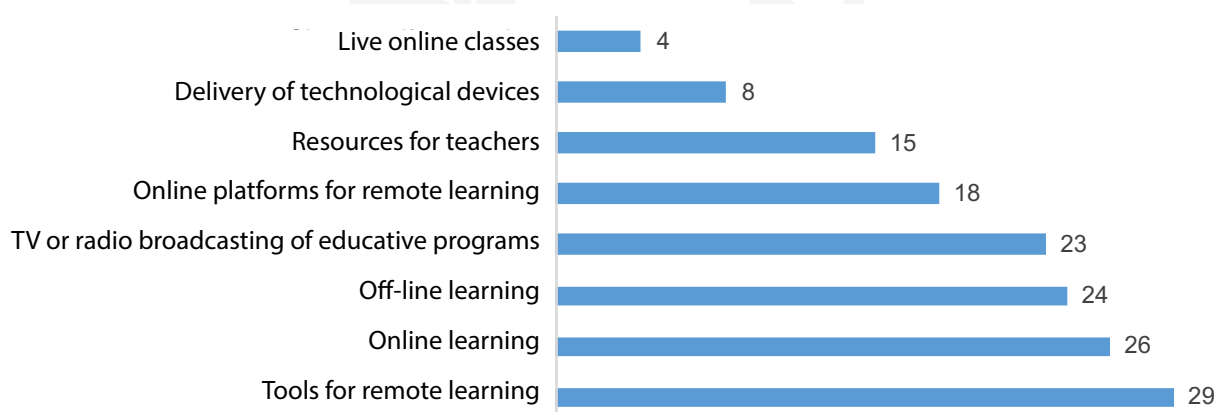
25 Information gathered from Google’s corporate blog for Latin America. Available at:

<https://latam.googleblog.com/2021/02/google-news-showcase-l.html>

26 Information gathered from Google’s corporate blog for Latin America. Available at: <https://latam.googleblog.com/2020/05/anunciamos-fondos-para-mas-de-mil-organizaciones-de-medios-locales-en-america-latina.html>

27 Information on remote education models in radios and TV channels gathered from the article “Informe preliminar: Políticas educativas en el contexto internacional (evaluación nacional del proceso de continuidad pedagógica)”, Revista Latinoamericana de Educación Comparada. Available at: [https://www.saece.com.ar/relec/revistas/18/revista\\_a11n18.pdf](https://www.saece.com.ar/relec/revistas/18/revista_a11n18.pdf)

**Figure 4. Strategies for Continuing Studying Remotely in Latin America and the Caribbean (29 countries)**



Source: ECLAC, based on SITEAL data

accompany children and parents during school closures. After more than 100 radio and TV broadcasts in 2020, the program will continue in 2021. Canal Institucional and Señal Colombia also had other education programs besides “Profe en tu casa”. Additionally, RTVC designed a call to finance education content production projects, selecting 70 of the 900 proposals received.

Mexico developed the “Aprende en casa” (Learn at Home) program, which was designed for students of all educational levels, including secondary and high school. A web platform is the central support for contents that strongly rely on a long list of public and private TV channels throughout Mexico. State productions were organized in different curricular levels in the morning and afternoon (not without obstacles) to achieve more than ten hours of educational broadcasting per day. The pre-existing “TELEsecundaria” (TELEsecondary) program of teacher resources focused towards high school pupils in rural regions was also maintained. Finally, various radio programs in 15 different languages were created for communities and indigenous peoples.

In Uruguay, the National Administration of Public Education (ANEP) and TNU (public television) presented the program “Tiempo de Aprender” (Time to Learn) designed for families and elementary school students. The “C+” program was designed for middle and high school students. All this content was broadcasted on the state channel and on its various

official platforms. these programs did not respond to the curricula, but rather to educational entertainment to accompany the isolation of children and adolescents.

Finally, in Brazil, the Ministry of Education launched a TV program oriented towards education, but without curricular content, called “How to Maximize Time with your Children” (Cómo aprovechar el tiempo con los hijos). Brazil was one of the countries that relied less on the media to promote and support remote education.

The community, cooperative and indigenous radio sector had a very important role during the COVID-19 pandemic in Latin America.<sup>28</sup> Its primary roles can also be discovered in the cause and origin of its formation. Radios played an important role in providing educational content as well as information of national, regional, or local public interest to their audiences due to their territorial capillarity and ability to reach remote geographic areas and communities that do not share the official language of the countries.

The Argentinian community and indigenous radio stations that joined the broadcast of the radio program “We Continue Educating” (Seguimos Educando), are an example of these actions. In this way, they complemented the public program by offering these contents to the audiences of a hundred or so of FM radio stations throughout the country.

28 Informe “Medios comunitarios en tiempos de pandemia: nueva normalidad, otra comunicación” by Friedrich Ebert Stiftung. Available at: <http://library.fes.de/pdf-files/bueros/argentini/en/16626.pdf>

Similarly, in Mexico, the indigenous radio stations had a key role in the translation of relevant information and messages of public interest into more than 15 local languages that represent these communities. In this case, the indigenous radio stations became the beneficiaries and partners of funding and support programs of UN agencies such as UNESCO and UNHCR.

In terms of network access, community radio stations have taken a variety of actions. Several rural communities in Colombia were completely cut off from the Internet and mobile telephone networks. Thanks to the access to their community networks, the citizens of Maní, Casanare, for example, could keep in contact with their families, make digital payments, and order food and different supplies without having to break their isolation. In Argentina, the National Communication Agency has also designed funding policies for the development of community telephone and Internet networks, with

the participation of many community radio stations.<sup>29</sup>

On the other hand, virtuality and decentralization at the time of producing content prompted community media to think of new ways to connect and expand the information agendas and contact horizons with other producers. An example of this was the “Cadenazo Radial: Salud y Vida de Todxs”. This initiative brought together community, alternative and independent media in Latin America to carry out a collaborative radio broadcast to communicate and analyze public policies against COVID-19 with a different agenda and a different perspective from the mainstream media. The first broadcast included actors from Argentina, Chile, Costa Rica, Ecuador, Guatemala, Honduras, Mexico and Panama. It was a joint and unique broadcast that lasted 14 hours. The interest generated by the “Cadenazo” and its success led to its regular broadcasting on ten occasions, with the participation of free broadcasters from Spain and Italy.

## Section 5. Public Policies of Assistance to the Media

In the context of the media economic crisis, Latin American states have taken a series of measures to collaborate, in some cases, with the media economy and to protect the work of journalists and other members of these teams. Edison Lanza, the Inter-American Commission on Human Rights (IACHR) Special Rapporteur for Freedom of Expression until October 2020, was adamant about the need to develop governmental aid programs as long as they are neutral. “Assistance should be established without discriminating on the basis of the editorial line, because the temptation exists. It could be [an economic aid]. Or a tax exemption for a certain period of time, or an emergency fund. There can be several formulas. Another formula is the access to partial unemployment insurances to allow journalists to continue working from home on a part-time basis. In the end, it’s a matter of being creative, depending on the tools available”, he proposed.

In this scenario, the assistance or measures adopted by the governments of the major Latin American countries can be classified as follows: those that protect labour sources; those that propose econo-

mic incentives for media operations; and various types of tax exemptions that also aim to improve the financial situation of the companies.

Brazil took a path contrary to the protection of workers: media companies were included among the beneficiaries of Provisional Measures No. 927 and No. 936, which allowed the suspension of contracts and reduction of salaries. In relation to the television industry, the government enabled the main channels to engage in multiprogramming in their digital TV signals. The objective of this measure was that the channels could broadcast school classes for students, who were forced to stay at home. In addition, the National Film Agency (ANCINE) developed an assistance package for the sector. The measures include credits to maintain employment in production and broadcasting companies, and the suspension for six months of the payment of credits taken with resources of the Audiovisual Sectorial Fund. The resources available formed a fund of US\$46 million for direct operations and US\$25.6 million for indirect actions. Additionally, payments

29 “Radios Pospandemia. Herramientas y estrategias para la nueva normalidad”, by DW Akademie. Available at: <https://www.dw.com/es/radios-pospandemia-herramientas-y-estrategias-para-la-nueva-normalidad/a-55718278>

due dates were suspended in favour of companies at a general level.

The measures taken in Argentina were somehow different from those adopted in Brazil. Alberto Fernández issued a decree (No. 329/2020) prohibiting the suspension of workers and their dismissal for a period of 60 days, which was extended to 180 days. He also designed a plan for the payment of salaries to workers of the most affected companies in the different economic areas, such as commerce and tourism. The media were included in this measure and benefited with the payment of 50% of the salary (with a limit of US\$33) of their payroll for four quarters. There was also an investment in official advertising, consisting in 5,000 campaigns of public interest throughout the country.

In Peru, TV stations tried to negotiate payment for broadcasting educational programs and public welfare advertising campaigns with the government, but the government refused. In contrast, the Ministry of Transport and Communications enabled AM radio stations to raise their power in order to reach rural and outlying locations where students needed to access the material of the remote education program "Aprendo en Casa" (I Learn from Home). That same agency, through decree No. 010-2020, extended for another six months the deadline for the owners of radio stations and TV channels to pay fees and taxes. Additionally, the collection of interests for omissions in legal filings and non-payment of audiovisual fees and taxes was suspended. Finally, the possibility of requesting the renewal of the authorizations to provide audiovisual communication services was extended until December 2020.

In the instance of Mexico, President Andrés Manuel López Obrador opted to return to radio and television station owners the free minutes allowed to the government by law to broadcast messages of public interest. The objective of this measure was that the media could then sell those minutes, thus increasing their revenue. But that measure was questioned by the Mexican Association of the Right to Communication (AMEDI), since it implied putting the commercial interest above people's right to access relevant information.

In Colombia, President Iván Duque was among the most active in the region regarding the implementation of measures for the media sector. Through decree No. 516/2020, he reduced to 20% the obligation to include national production in open TV so that the channels would be able to include cheaper programs in their programming. This decision was strongly rejected by the union of actors and the unions of workers of the audiovisual industry, who considered it an affront against their work. Through another decree (No. 659/2020), the payment of fees and taxes by private TV channels was postponed for six months and the annual payment obligation of these companies, as well as the payment of the contributions to the Information and Communications Technology Unique Fund (FUTIC) for non-profit channels and radio stations, was postponed until 2021. Finally, the decree provides for: "Financing the development of credit lines, the promotion and strengthening of telecommunications services and networks providers, as long as the Health Emergency declared by the Ministry of Health and Social Protection due to the pandemic derived from the COVID-19 is in place".

The Colombian case also stands out due to the discussion, in 2021, of a proposal known as "Regulation for the economic stability and the operation of the media in Colombia". This initiative, generated by the Executive Power, acknowledges the need to consider the access to and production of information and news as a fundamental right and an essential good. Thus, it considers it essential to take measures to guarantee its production and funding. The public initiative establishes a series of aids aimed at solving the economic crisis of the media between 2021 and 2025. The measures for national and regional media include: incentives to guarantee the hiring of journalists through the progressive reduction of employers' obligations along the years; a subsidy plan through which the State covers up to 20% of the losses of the media in advertising revenue during 2020; the non-payment of VAT on revenue derived from advertising sold by the media; a deduction of up to 75% in income filings for those companies that invest in advertising in print media and similar measures for individual taxpayers; and a discount of the value of up to one annual subscription in media of the income tax for natural persons



## Conclusiones

The advertising market crisis, which is the primary source of income for the majority of the media sector, was widespread, but Latin America was the most affected region. Furthermore, forecasts indicate that it will take two years to recover and return to 2019 levels. In this environment, the digital advertising business has increased its expansion in the region. The media is finding it more difficult to compete in the Internet advertising industry with giants like Google, Facebook, and Amazon, who control a growing portion of the revenue.

To begin fighting the decline in advertising revenue, the media have accelerated their business model review processes in order to have the greatest diversity of sources. In this context, the model of obtaining payment and subscription models emerged as the main alternative. Despite of it being a global trend, Latin American media have not yet achieved great results with this model of exclusive access to content. However, it is one of the strategies that have been implemented even at times when information is an essential good. Companies such as Google and Facebook have launched their own assistance funds and have also entered into agreements with publishers in certain countries, such as Argentina and Brazil, to pay for their content.

Platforms such as TikTok and Twitch have turned into great centres of attention, not only for the audiences, but also for the media that generated in these platforms some embryonic strategies to reach mainly young users. Newsletters and podcasts are the other two products that have been more widely used to generate new instances of contact with the audience.

Productive models have been forced to decentralize and restructure to accommodate teleworking, which companies are not opposed to. Many publishers say that the model of working from home and reducing physical newsrooms could be a legacy of the pandemic. The media that have closed and the print editions that have stopped circulating produce an increase of the labour crisis that also expresses itself in the flexibilization in terms of hiring, the weakening of union strength and income instability. In this context, during the pandemic, workers assumed a portion of labour costs (equipment

and connection), and the companies found a place where they could reduce expenses.

In the midst of the commercial media's economic and labour crises, state and community media played a critical role in the spread of educational information to complement the virtual learning process. Furthermore, community media and its capillarity were critical in providing information and public welfare campaigns to remote or rural communities, as well as those that do not speak the official language, as is the case in Mexico.

Regarding public assistance policies to the media, it has to be highlighted that some countries implemented general measures, such as the prohibition of dismissals or salary reductions, as well as the extension or cancelation of payment of taxes or fees which are specific of the sector. Beyond the expenditure in official advertising, cases of development of funds specific for the activity were not found.

As a result, this study paints a critical picture of the Latin American media industry. The pandemic's strong impact on the advertising market appears to exacerbate the crisis, particularly the labour problem, creating a fertile environment for giant digital platforms to extend their presence (also economically), while local, regional, and small media struggle to restructure their revenue. The new products and channels through which contents can be distributed, coincide with major monetization problems. So, it seems that while there are increasingly more spaces to occupy and the relevance of serious and professional information is also increasing, the ability to generate revenues decreases. The State's assistance and its role as guarantor of the diverse and professional sources of information seem to be increasingly necessary to reverse this negative cycle.





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