

## BRAZIL: 2021, YEAR OF RESUMPTION OF TELEVISION FICTION, BUT STILL PANDEMIC<sup>1</sup>

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## 1. The Audiovisual Context of Brazil in 2021

### Introduction

*Utopia is on the horizon. I move two steps closer; it moves two steps away. I walk ten more steps and the horizon runs ten steps further. No matter how far I walk, I will never reach it. So, what is the point of utopia? That is the point: keep walking.*

Eduardo Galeano

In October 2021, the pandemic reached in Brazil the mark of 600,000 dead Brazilians,<sup>2</sup> composing the advance of the *suicidal state* (Safatle), necropolitics (Mbembe) and the construction of an *ethos* of naturalization of indifference.

With the improvement of vaccination in 2021, there was a drop in deaths, still without signs of approaching the end. The economy was recovering in some industries, such as audiovisual which, in 2021, after almost two years, resumed the recordings of television fictions and launched unreleased products on open TV. It was also the year of the *streaming* protagonism, with the domestic market heated by the high demand coming from the restrictions of pandemic daily life and the entry of new platforms such as HBO Max and Star+, intensifying competition, especially

<sup>1</sup> The Obitel Brasil team thanks Kantar Ibope Media, whose kindly provided information made it possible to carry out the analyses presented.

<sup>2</sup> In 2022, when this text is being written, Brazil has 668.000 dead people, second in the world, only behind the United States which reached the record of one million deaths from Covid-19. Source: Vehicle Consortium.

with Globoplay, Netflix and Disney+. However, as we will see, open TV remained the leader of the ratings.

### 1.1. Open TV in Brazil

**Table 1. Open national television broadcasters in Brazil in 2021**

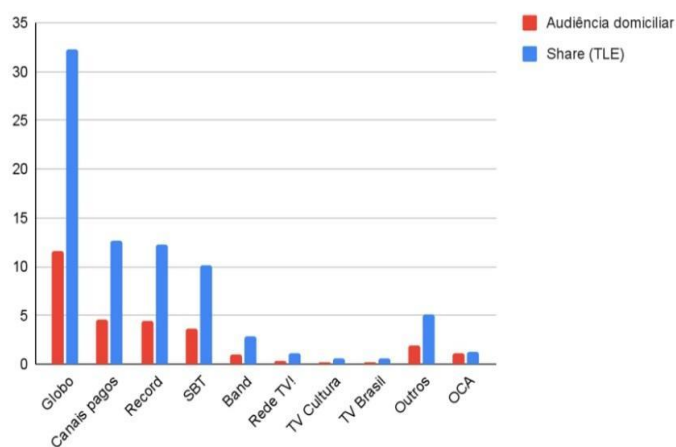
| <b>PRIVATE BROADCASTERS (5)</b>               | <b>PUBLIC BROADCASTERS (2)</b> |
|---|--------------------------------|
| Globo<br>Record TV<br>SBT<br>Band<br>Rede TV! | TV Brasil<br>TV Cultura        |
| <b>TOTAL TV STATIONS: 7</b>                   |                                |

Source: Obitel Brazil

The Brazilian television system consists of seven domestic television networks, five of which are private and two are public.

**Graph. 1. TV audience and share by broadcaster in 2021**

| <b>Broadcaster</b>  | <b>Home audience</b> | <b>Share (TLE)</b> |
|---------------------|----------------------|--------------------|
| Globo               | 11.6                 | 32.2               |
| Paid channels       | 4.6                  | 12.6               |
| Record              | 4.4                  | 12.3               |
| SBT                 | 3.6                  | 10.1               |
| Band                | 1.0                  | 2.9                |
| Rede TV!            | 0.4                  | 1.1                |
| TV Cultura          | 0.2                  | 0.6                |
| TV Brasil           | 0.2                  | 0.6                |
| Others <sup>3</sup> | 1.8                  | 5.1                |
| OCA <sup>4</sup>    | 0.8                  | 2.2                |
| <b>TOTAL</b>        | <b>27.0</b>          |                    |



Source: Kantar Ibope Media/ Instar Analytics  
Base RM Completo/ 06h-30h/Total Domicílios /JanDez2021

According to the data, we verify a slight decrease in the total audience of open TV, which scored 21.4 in 2021 compared to 23.3 in the previous year, a drop of 1.9 points, confirming a trend of gradual reduction observed in recent years.

<sup>3</sup> Others: Record News, TV Câmara, TV Justiça, TV Senado

<sup>4</sup> OCA - Other Open Channels: open TV stations that have no individually published audience.

In open TV, the leadership continues to be Globo, with 11.6 points, even with a drop of 0.8 points compared to 2020. Record remains in second place with 4.4 points, maintaining the same number as in 2020. SBT appears in third, with a downturn of 0.7 points.

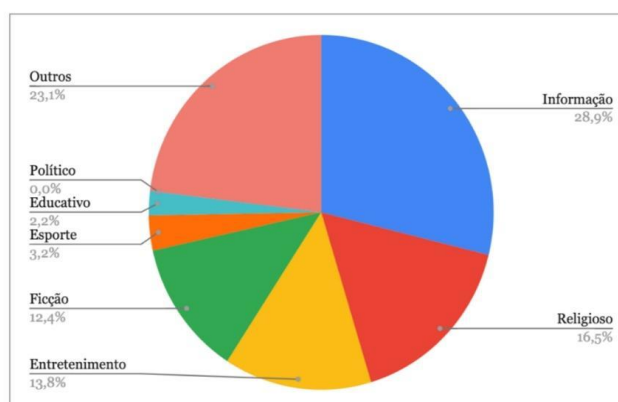
Whether in number of audience points or *share* percentages, there is relative stability in the open TV audience - a positive fact for a second year of the pandemic.

On the other hand, we observe a continued decline in the audience of paid channels from 5.2 points in 2020 to 4.6 points in 2021 (-0.6) and 13.8% of *share* to 12.6% in 2021 (- 1.2%).

As for the media penetration ratings<sup>5</sup>, the internet reached 87.7% and consolidated itself as the most popular vehicle among Brazilians, as in 2020. The 5% drop in television penetration dialogues with previous data, which confirm a certain relative stability in the national territory. As in other years, printed media also fell, especially newspapers. However, no decrease was comparable to that of movie theaters, from 15.4% to 2.4%, data visibly explained by social isolation measures and, to a lesser extent, the arrival of new VoD *players* in the country, such as HBO Max, Star+.

**Graph 2. Genres and hours broadcasted on TV programming in 2021<sup>6</sup>**

| Broadcast genres | Exhibition hours | %     |
|------------------|------------------|-------|
| Information      | 32,822.0         | 28.9  |
| Religious        | 18,722.9         | 16.5  |
| Entertainment    | 15,734.8         | 13.8  |
| Fiction          | 14,053.1         | 12.4  |
| Sports           | 3,637.8          | 3.2   |
| Educational      | 2,503.0          | 2.2   |
| Political        | 8.5              | 0.01  |
| Others           | 26,231.0         | 23.1  |
| Total            | 113,713.1        | 100.0 |



Source: Obitel Brazil and Kantar Ibope Media

<sup>5</sup> Media penetration ratings comparing 2021 with 2020: Internet, 87.7% vs. 87.2%; Extensive Media, 84.5% vs. 83.7%; Open TV, 80.0% vs. 85.2%; Radio, 41.9% vs. 57.2%; Paid TV, 34.3% vs. 34.9%; Magazines, 6.2% vs. 8.7%; Newspapers, 5.2% vs. 11.0%; Movie Theaters, 2.4% vs. 15.4%. Source: Kantar Ibope Media: Target Group Index.

<sup>6</sup> Genres: Fiction: film, miniseries, telenovela, series; Entertainment: auditorium, cars and engines, culinary, game show, humorous, children's, musical, awards, reality show, show; Information: debate, documentary, interview, journalism, TV report; Sports: sports, football; Religious; Educational; Political; and Others: others, not listed, rural, health, raffle, telesales, travel and tourism. This final classification was made by Obitel Brasil, based on categories from Kantar Ibope Media.

Regarding the total number of hours broadcast on television, we note an increase of 11.3% compared to 2020. As for the performance by genre, we highlight: (1) the maintenance of information leadership, due to the continuous journalistic coverage of the pandemic; (2) the strong rise of the Religious genre to second place; (3) the decrease of Entertainment to third place; and especially, (4) the increase of 6.5% of the broadcast hours of Fiction (from 13,198.3 to 14,053.1), which should be correlated to the resumption of telenovela premieres.

### 1.2. Paid TV and VoD platforms in Brazil

In 2021, the number of paid TV subscribers continues to decline. According to data from the National Telecommunications Agency (Anatel)<sup>7</sup>, the reduction corresponded to around 1.4 million subscribers<sup>8</sup>.

**Table 2. Paid TV Channels in Brazil**

| Paid TV Channels   |                       |                              |                   |
|--------------------|-----------------------|------------------------------|-------------------|
| 1 - VIVA           | 6 - Discovery Channel | 11 - SPORTV 4                | 16 - Space        |
| 2 - GloboNews      | 7 - Cartoon Network   | 12 - GLOOB                   | 17 - Star Channel |
| 3 - SPORTV         | 8 - Universal TV      | 13 - Discovery Home & Health | 18 - ESPN Brazil  |
| 4 - Discovery Kids | 9 - MEGAPIX           | 14 - TNT                     | 19 - TLC          |
| 5 - AXN            | 10 - MULTISHOW        | 15 - SPORTV 2                | 20 - Warner       |

Source: Kantar Ibope Media

Of the 20 domestic channels with the highest paid TV audience, Viva Channel, dedicated to reruns of Globo's content, is the leader, indicating the receivers' interest in (re)watching fictions. Multishow was the only one to broadcast an unreleased domestic production, the humorous *Tô de graça* (Season 5). There was also the premiere of three foreign series, all Spanish, *A Peste* (1st and 2nd seasons), *Vergonha* (Season 1) on HBO; and *Maricón Perdido* (Season 1), on TNT.

<sup>7</sup> Cf. <https://bit.ly/3KZWSyF>

<sup>8</sup> The number of paid TV subscribers in Brazil went from 14.830 million in 2020 to 13.414 million in 2021, a drop of 9.5%. However, a change made to the subscriber metrics, which began to count viewers with prepaid equipment, raised the number of subscribers from 13 million to 16.040 million.

Table 3. VoD in Brazil

| Types  | Platforms  |
|--|--|
| <b>VoD linked to open TV chains (5)</b>              | Globoplay (from Globo), SBT Vídeos (from SBT), PlayPlus (from Record), EBC Play (from TV Brasil) and Sara Play (from TV Gênese)  |
| <b>VoD linked to paid TV chains (31)</b>             | AXN, Sony Channel, NOW NET and Claro, WatchESPN, Discovery Kids Plus, Globo Channels, Gloob Play, Box Brazil Play, Fox Play, TNT Go, TCM Play, HBO Go <sup>9</sup> , Cartoon Network, Rá Tim Bum Play, A&E Play, EI Plus, FishTV, History Play, Tamanduá TV, Artele Play, Premiere, SKY Play, Telecine Play, A&E Brasil Channel (YouTube), Lifetime Brasil Channel (YouTube), CineBrasil Já, Combate Play, Noggin, Pluto TV, Directv GO and Paramount+.  |
| <b>VoD linked to telecommunication companies (8)</b> | Claro Video, Apple TV Plus, Oi Play, Vivo Play, VID+ (AlgarTelecom), Brisa Play (Brisa Net) e Now Online (Claro)   |
| <b>VoD without link to TV chains (48)</b>            | Afrolix, Prime Video, Babidiboo.Tv, Pluto TV, Crackle, Crunchyroll, Enter Play, Google Play, HBO Max, LibreFlix, Looke, Microsoft Movie and TV, Mubi, My French Filme Festival, NBA TV, Netflix, Oldflix, Smart VoD, Univer, Vevo, Videocamp, Vemeo, Youtube, O2 Play, Sot.TV, Dazn, Estadio TNT Sports, À La Carte, Apple TV +, Box Brasil Play, Vix Filmes and TV, UolPlay, Crunchy, Roll, Inff Online, Filme Filme, Samsung TV Plus, Supo Mungan Plus, Disney+, Quibi, SPCine Play, Netmovies, Vix Cine TV, StarzPlay (Lionsgate), SPCine Play, Kinopop, Darkflix, Cinema Virtual, STAR+ and SescDigital. |
| <b>Total</b>   | <b>92</b>  |

Source: Obitel Brazil

In 2021, there were 92 VoD platforms, two more compared to 2020. The two new *players* are HBO Max and STAR+. In addition to expanding its catalog, Globoplay has invested in partnerships with other platforms, such as Disney+, STAR+, Dever and Apple TV+. Facing the growth of competitors, Netflix, the market leader, announced the investment in 40 Brazilian productions in 2022<sup>10</sup>. *Streaming* subscriptions grew by 8% in 2021, with two out of three subscribers paying for more than one service<sup>11</sup>.

These changes are reflected in the role of both producers/creators and receivers, and lead to new relationships, referred to by Hall (1997) as *circuits of culture*, consisting of consumption, production, regulation, representation, and identity.

<sup>9</sup> HBO Go was discontinued in June 2021, when HBO Max was launched.

<sup>10</sup> This fact was denied in early 2002 due to the losses of 20 million subscribers, in addition to the crisis of its shares on the stock market.

<sup>11</sup> Cf. <https://bit.ly/3ypNpOj>.

### 1.3. Independent production companies of television fiction

In 2021, the number of independent production companies registered with Ancine (National Film Agency) was 9,506<sup>12</sup>, representing an increase of 9,88% compared to 2020, that is, there were 855 new registrations in the year.

On open TV, three unreleased series were aired in co-production between Globo Studios and independent production companies, a drop of 67% compared to 2020 (9). On paid TV, there were 12 domestic titles produced or co-produced with a drop of 14.28%. In contrast, 28 works were produced or co-produced for VoD, an increase of 21.7%. It follows that VoD was the only platform responsible for keeping the audiovisual market warm in 2021.

Conspiração was the independent production company with the largest number of contents for *streaming* with four titles, followed by Gullane, with three works and, O2 e Cristal Líquido Produções, with two works each.

It is worth mentioning two dates celebrated in 2021: the 20th anniversary of Ancine's creation and the 10th anniversary of the Pay TV Law<sup>13</sup>, milestones in the financing of domestic telefiction production, which contrast with the dismantling of the current federal policy, responsible for the second year of great losses for the industry.

### 1.4. Sources of funding for the audiovisual industry

The advertising market moved R\$ 19.7 billion reais in 2021, an increase of 38.8% compared to 2020, with a growth of 74.2% of resources destined to digital media. However, open TV remained as the media of greatest advertising investment, with a growth of 21% in 2021<sup>14</sup>.

Although the invoicing of all media vehicles increased in 2021, it was not proportional to the increase in *share*, since only the internet and paid TV obtained an increase regarding this matter, of 33.5% and 6.4%, respectively, compared to the previous year.

With the resumption of recordings, the campaigns of *product placement*<sup>15</sup> returned to telenovelas. We mention a beer campaign, featured in *Amor de Mãe* (Globo, 2021) and which was digitally inserted in a scene from the rerun of *Império* (Globo, 2021).

### 1.5. Communication policies

In 2021, communication policies were marked by economic uncertainties, with budget cuts<sup>16</sup> at the Ministry of Communications (MCom).

<sup>12</sup> Cf. <https://bit.ly/3P85vKG>.

<sup>13</sup> The Act 12.485 or SeAC Act (Conditional Access Service) caused a profound transformation in the Brazilian audiovisual market, as it regulated domestic exhibition quotas on Paid TV.

<sup>14</sup> Data from Cenp-Meios (Advertising Market Self-Regulation Forum). Cf. <https://bit.ly/3OfJDfa>.

<sup>15</sup> Correct name for the popularly known commercial *merchandising*.

<sup>16</sup> Cf. <https://bit.ly/3MZ0Nx9>.

Since the beginning of the current government, ANCINE has suffered political and ideological persecution and, in 2021, registered its worst result in the Integrated Governance and Management Index (IGG21)<sup>17</sup>. In addition, there were no advances in the development of laws that would ensure the growth of the Brazilian audiovisual, such as the proposals – not implemented – made by the OECD<sup>18</sup> to modernize the Pay TV Law<sup>19</sup>.

The 5G technology<sup>20</sup>, installed in Brazil in 2021, implies the generation of a mobile internet network with higher quality, speed and coverage. Among the obligations of the telecommunication companies that participated in the auction are: providing internet access in schools, roads and small municipalities; migrating open satellite TV to another frequency and building a high-security private network for the federal government.

### 1.6. Digital and mobile connectivity infrastructure

Despite the pandemic, the digital environment registered growth in 2021, driven by strong market demand, which led to the platforming of companies. Several online activities remained present in Brazilian daily life, even with the hybrid format (face-to-face and virtual activities) initiated in some segments.

When comparing the 2021 data<sup>21</sup> to those of the previous year<sup>22</sup>, we found an increase in both the internet connection (11 %) and the use of computers, *notebooks* and *tablets* (12%). Digital television consumption grew by 4% and mobile phone consumption by 1%. The most practiced activities were: instant messaging (96%); digital media (91%); audiovisual (89%), music (86%) and voice or video calls (82%). We highlight the growth of both the search for health information and the “infodemia”<sup>23</sup>, in addition to the expansion of financial transactions over the internet given the creation of Pix, instant digital payment system. *Streaming* and VoD consumption remained high, with 43% of internet users paying for these services, which, however, remain inaccessible to most Brazilians<sup>24</sup>. Even with the digital connection disparity, Brazil is the second most consuming country in the world for *streaming*<sup>25</sup>. According to estimates in 2021, the number of subscriptions was about 22 million<sup>26</sup>.

<sup>17</sup> Cf. <https://bit.ly/3kUEexK>.

<sup>18</sup> The Organisation for Economic Co-operation and Development (OECD) pointed out in 2020 the need for a review in the legal and regulatory model of the paid TV market. Available at: <https://bit.ly/3vX3MjR>

<sup>19</sup> Cf. <https://bit.ly/3wzx4V5>.

<sup>20</sup> Cf. <https://bit.ly/3KRYevm>.

<sup>21</sup> CETIC survey, COVID-19 TIC panel: online research with Internet users in Brazil, 4 ed., 2021. Available at: <https://bit.ly/3N0OAYS>

<sup>22</sup> Cf. <https://bit.ly/3N0OAYS>

<sup>23</sup> A term created by the WHO for the phenomenon of the dissemination of misinformation about the health crisis.

<sup>24</sup> Cf. <https://bit.ly/3Mxthxv>.

<sup>25</sup> Cf. <https://bit.ly/3lmlfvW>.

<sup>26</sup> Cf. <https://bit.ly/3mlB7iJ>.

## 2. Analysis of the year: premiere domestic and Ibero-American fiction in 2021

In the VoD era, 93% of the Brazilian population, more than 205 million people, watched open television stations in 2021, with an average daily individual consumption time of 5h37m. The search for content shows that the consumption of open TV and VoD are combined in people's daily lives. Linear TV consumption is the most popular, watched by 79% of the population, while 21% watch video platforms: 15% AVoD (free, with advertising); 6% SVoD (subscribed by users)<sup>27</sup>. This brief summary refers to the general scenario through which the production and consumption of serial fiction transits.

**TABLE 1. Premiere fictions exhibited in 2021  
(national, foreign of the Obitel scope and co-productions)**

Table 1. Fiction broadcasted in 2019 (national and imported; premieres and reruns; co-productions)

| UNRELEASED DOMESTIC TITLES - 17   | UNRELEASED FOREIGN TITLES - 6   |
|---|---|
| <p><b>TV Globo – 14 titles</b> <sup>28</sup></p> <ol style="list-style-type: none"> <li>1. <i>Amor de Mãe</i> (telenovela)</li> <li>2. <i>Arcanjo Renegado</i> (series, VoD)</li> <li>3. <i>As Five</i> (series, VoD)</li> <li>4. <i>Carcereiros</i> (series, VoD)</li> <li>5. <i>Desalma</i> (series, VoD)</li> <li>6. <i>Eu, a Vó e a Boi</i> (series, VoD)</li> <li>7. <i>Ilha de Ferro</i> (series, VoD)</li> <li>8. <i>Nos Tempos do Imperador</i> (telenovela)</li> <li>9. <i>Quanto Mais Vida, Melhor</i> (telenovela)</li> <li>10. <i>Salve-se Quem Puder</i> (telenovela)</li> <li>11. <i>Shippados</i> (series, VoD)</li> <li>12. <i>Sob Pressão</i> (series)</li> <li>13. <i>Todas as Mulheres do Mundo</i> (series, VoD)</li> <li>14. <i>Um Lugar ao Sol</i> (telenovela)</li> </ol> <p><b>Record – 2 titles</b></p> <ol style="list-style-type: none"> <li>15. <i>Amor sem Igual</i> (telenovela)</li> <li>16. <i>Gênesis</i> (telenovela)</li> </ol> <p><b>TV Cultura - 1 title</b></p> <ol style="list-style-type: none"> <li>17. <i>Velhas Amigas</i> (miniseries)</li> </ol> | <p><b>SBT – 5 titles</b></p> <ol style="list-style-type: none"> <li>18. <i>Amores Verdadeiros</i> (telenovela – Mexico)</li> <li>19. <i>A Usurpadora</i> (series – Mexico)</li> <li>20. <i>Quando me Apaixonou</i> (telenovela – Mexico)</li> <li>21. <i>Te Dou a Vida</i> (telenovela – Mexico)</li> <li>22. <i>Triunfo do Amor</i> (telenovela – Mexico)</li> </ol> <p><b>Band – 1 title</b></p> <ol style="list-style-type: none"> <li>23. <i>Nazaré</i> (telenovela – Portugal)</li> </ol> <p><b>TOTAL UNRELEASED TITLES: 23</b><br/> <b>DOMESTIC: 17</b><br/> <b>FOREIGNERS: 6</b><br/> <b>CO-PRODUCTIONS: 0</b></p> |

Source: Kantar Ibope Media - Obitel Brazil

<sup>27</sup> All data are from Kantar Ibope Media, Video streaming Report, 2022, with the first video audience measurements in all platforms.

<sup>28</sup> Globo's strategy of showing fictions produced for Globoplay, its streaming platform, and then premiering them on another platform, open television, has become habitual, through which it prolongs



domestic reruns fell by 4% compared to 2020, from 25 to 24 titles. That is, despite the resumption efforts, 2021 data remained in the same range as in 2020.

In the first months of 2021, Globo continued reprising telenovelas, reissuing them as “Special Edition” - pandemic format for *prime time* reruns - while finishing the postponed productions. Once the rerun of *A Força do Querer* (2017) was finished, the telenovela *Amor de Mãe* (2019), interrupted in 2020, was resumed in two parts: the first, with a summary in 12 chapters of the original telenovela and the second with 23 unreleased chapters, recorded at the end of 2020, during the pandemic. In its resumption, it maintained its good pre-pandemic audience ratings, with an average of 30.9 points. We consider *Amor de Mãe* the first *pandemic telenovela*<sup>29</sup>, for incorporating the context of the pandemic into its plot, including significant changes in the paths of some characters. Its replacement was the rerun of *Império* (2014), since the worsening of the pandemic postponed the production of the successor, the unreleased *Um Lugar ao Sol*.

The other channels also maintained reruns during the year of 2021. SBT did not produce any domestic titles, doubling the number of imported ones, from three to six. Record, on the other hand, premiered two unreleased domestic productions, against only one the previous year and exhibited 6 reruns.

As for public televisions, TV Brasil did not show fiction in the year of 2021 and TV Cultura premiered an unreleased title, the miniseries *Velhas Amigas* (from the TV Series 2018, from the *streaming* channel Box Brasil Play), with a drop of five productions compared to 2020.

Tables 2, 3 and 4 that follow below are strategic because they demonstrate the production capacity of television fiction in the country.

**TABLE 2. Premiere domestic fiction in 2021  
and its evolution in the five-year term**

| Year  | Titles | %    | Hours    | %    |
|-------|--------|------|----------|------|
| 2017  | 43     | 81.1 | 1430:50  | 79.1 |
| 2018  | 45     | 90.0 | 1299:26  | 81.9 |
| 2019  | 48     | 92.3 | 1307:25  | 85.3 |
| 2020  | 23     | 85.2 | 416:07   | 50.0 |
| 2021  | 17     | 74.0 | 418:35   | 50.0 |
| Total | 176    |      | 4,871:43 |      |

Source: Obitel Brazil

<sup>29</sup> We address it as the theme of the year in the Obitel 2020 Yearbook.

Through this new Table 2, it is possible to follow the evolutionary dynamics of the unreleased domestic production, over a five-year period, through the number of titles and hours.

With an average of 40 titles/year, Brazil has always been among the Obitel countries with high *production capacity*<sup>30</sup>. This flow data is reiterated in the table above, in the first three years of the 2017-2021 five-year term, with an average of 45.3 titles/year, and with a growth trend. This is followed by a brutal rupture in the last two years, mainly caused by the Covid-19 pandemic, in which the average number of titles fell deeply to 20 titles/year. The result was a 56% loss of titles, more than half the average of the first three-year term. Consequently, the number of hours produced also fell sharply: before 2020, the average was 1,346 hours/year and in the two years of the pandemic it fell to 417 hours/year, resulting in a drop of 69%. The numbers speak for themselves about how deep the cut has been in the production capacity of television fiction in the country. The transition year, called “post” pandemic of 2021, has not shown how it will happen, nor what to expect from a resumption process.

**TABLE 3. Formats of premiere domestic fiction in 2021 and its evolution in the five-year term**

| Format            | Titles |      |      |      |      | Hours   |         |         |        |        |
|-------------------|--------|------|------|------|------|---------|---------|---------|--------|--------|
|                   | 2017   | 2018 | 2019 | 2020 | 2021 | 2017    | 2018    | 2019    | 2020   | 2021   |
| <b>Telenovela</b> | 15     | 15   | 15   | 6    | 7    | 1225:15 | 1193:25 | 1075:00 | 339:35 | 366:40 |
| <b>Series</b>     | 10     | 18   | 18   | 9    | 9    | 74:40   | 102:50  | 85:00   | 34:10  | 50:45  |
| <b>Miniseries</b> | 2      | 4    | 5    | 1    | 1    | 19:20   | 12:55   | 20:25   | 7:45   | 1:05   |
| <b>Sitcom</b>     | 0      | 0    | 1    | 2    | 0    | 0:00    | 0:00    | 0:45    | 1:40   | 0:00   |
| <b>Unitary</b>    | 1      | 1    | 0    | 0    | 0    | 2:10    | 2:25    | 0:00    | 0:00   | 0:00   |
| <b>Docudrama</b>  | 0      | 0    | 0    | 0    | 0    | 0:00    | 0:00    | 0:00    | 0:00   | 0:00   |
| <b>Others</b>     | 3      | 5    | 6    | 5    | 0    | 113:25  | 119:40  | 118:15  | 32:55  | 0:00   |

Source: Obitel Brazil

Continuing to present the production capacity of the five-year term, Table 3 shows the trends of the formats which present some important changes. The first of these is the increase in series compared to telenovelas, a fact that we have already pointed out since 2018. Even with the drops in the two pandemic years, this format appears on the rise, with its increase being 10% in the five-year period. Thus, there is a significant transformation in the serialization regime that traditionally marks Brazilian telefiction, that is, the telenovela is a long-serialized fiction and the

<sup>30</sup> The *production capacity* of a television station is a concept that refers to its infrastructure conditions and technical resources that allow a continuous cycle production and high volumes of products, added to human resources with specialized *know how*.

series is short-serialized.<sup>31</sup> Which forces us to ask how far will the Brazilian's taste for short narratives go and how will the country articulate it with the telenovela culture that exists in the territory? A second trend concerns the production of mini-series, format of large audience and fictions remembered for their quality. Its regime of seriality is diverse, of a short narrative told in chapters and without seasons.

**TABLE 4. Premiere fiction in 2021: countries of origin**

| <b>Countries</b>                               | <b>Titles</b> | <b>%</b>     | <b>Hours</b>  | <b>%</b>     |
|--|---------------|--------------|---------------|--------------|
| <b>DOMESTIC (total)</b>                        | <b>17</b>     | <b>74.0</b>  | <b>418:35</b> | <b>50.0</b>  |
| <b>OBITEL COUNTRIES (total)</b>                | <b>6</b>      | <b>26.0</b>  | <b>416:30</b> | <b>50.0</b>  |
| <b>Argentina</b>                               | 0             | 0.0          | 0:00          | 0.0          |
| <b>Brazil</b>                                  | 17            | 74.0         | 418:35        | 50.0         |
| <b>Chile</b>                                   | 0             | 0.0          | 0:00          | 0.0          |
| <b>Colombia</b>                                | 0             | 0.0          | 0:00          | 0.0          |
| <b>Ecuador</b>                                 | 0             | 0.0          | 0:00          | 0.0          |
| <b>Spain</b>                                   | 0             | 0.0          | 0:00          | 0.0          |
| <b>USA (Hispanic production)</b>               | 0             | 0.0          | 0:00          | 0.0          |
| <b>Mexico</b>                                  | 5             | 22.0         | 342:00        | 41.0         |
| <b>Peru</b>                                    | 0             | 0.0          | 0:00          | 0.0          |
| <b>Portugal</b>                                | 1             | 4.0          | 74:30         | 9.0          |
| <b>Uruguay</b>                                 | 0             | 0.0          | 0:00          | 0.0          |
| <b>Venezuela</b>                               | 0             | 0.0          | 0:00          | 0.0          |
| <b>CO-PRODUCTIONS (total)</b>                  | <b>0</b>      | <b>0.0</b>   | <b>0:00</b>   | <b>0.0</b>   |
| <b>Domestic co-productions</b>                 | 0             | 0.0          | 0:00          | 0.0          |
| <b>Co-productions between Obitel countries</b> | 0             | 0.0          | 0:00          | 0.0          |
| <b>TOTAL</b>                                   | <b>23</b>     | <b>100.0</b> | <b>835:05</b> | <b>100.0</b> |

Source: Obitel Brazil

Still within a pandemic scenario, as was the year of 2021, the number of Brazilian titles fell from 23 to 17 works, or 26% compared to 2020, however, the number of fiction hours exhibited increased by 0.5%. On the other hand, there was a great growth in the number of Ibero-American productions, with 50% more titles released in 2021, representing 26% of the total number of titles released - against 14.8% in 2020. The lack of new domestic fictions may have found a handy substitute in imports. The nationality of the imported productions remained similar to that of the previous year, with five of Mexican origin and one Portuguese.

<sup>31</sup> It is not the case to deal here with the serialization of the telenovela and the series and we have already made sparse remarks about their distinctions. We believe, however, that this is a study that is imposed, especially in Latin America, due to the consolidation of streaming, whose preferred format is the series.

TABLE 5. Domestic and Ibero-American fiction formats exhibited in 2021

| Format            | Titles    |            |                 |            | Hours         |            |                 |            |
|-------------------|-----------|------------|-----------------|------------|---------------|------------|-----------------|------------|
|                   | Domestic  | %          | Ibero-Americans | %          | Domestic      | %          | Ibero-Americans | %          |
| <b>Telenovela</b> | 7         | 41         | 5               | 83         | 366:40        | 87.6       | 401:55          | 96.6       |
| <b>Series</b>     | 9         | 53         | 1               | 17         | 50:50         | 12.1       | 14:35           | 3.4        |
| <b>Miniseries</b> | 1         | 5.9        | 0               | 0          | 01:05         | 0.26       | 00:00           | 0          |
| <b>Sitcom</b>     | 0         | 0          | 0               | 0          | 00:00         | 0          | 00:00           | 0          |
| <b>Unitary</b>    | 0         | 0          | 0               | 0          | 00:00         | 0          | 00:00           | 0          |
| <b>Docudrama</b>  | 0         | 0          | 0               | 0          | 00:00         | 0          | 00:00           | 0          |
| <b>Others</b>     | 0         | 0          | 0               | 0          | 00:00         | 0          | 00:00           | 0          |
| <b>Total</b>      | <b>17</b> | <b>100</b> | <b>6</b>        | <b>100</b> | <b>418:35</b> | <b>100</b> | <b>416:30</b>   | <b>100</b> |

Source: Obitel Brazil

In 2021, short serialization formats (series and miniseries) corresponded to 59% of the total number of unreleased domestic fictions exhibited on open TV, surpassing telenovela (41%), a long-serialized narrative. The diversification in production formats was even less than in 2020, with the absence of sitcoms, docudramas, and telemovies. The number of imported telenovelas increased by 25% from 2020 (4) to 2021 (5) and this year also had an imported series.

TABLE 6. The 10 most watched titles in 2021

|                                | Title                                     | Channel | Producing Country | Format/Genre                | No. of chapters/episodes in 2021 | Time Slot  | Rating | Share |
|--------------------------------|---|---------|-------------------|-----------------------------|----------------------------------|------------|--------|-------|
| 1                              | <i>Amor de Mãe</i>                        | Globo   | Brazil            | Telenovela/Drama            | 23                               | Prime Time | 30.9   | 46.2  |
| 2                              | <i>A Força do Querer, Special Edition</i> | Globo   | Brazil            | Telenovela/Drama            | 62                               | Prime Time | 29.2   | 45.4  |
| 3                              | <i>Império, Special Edition</i>           | Globo   | Brazil            | Telenovela/Drama            | 180                              | Prime Time | 26.3   | 41.1  |
| 4                              | <i>Salve-se Quem Puder</i>                | Globo   | Brazil            | Telenovela/Romantic Comedy  | 102                              | Prime Time | 25.6   | 39.6  |
| 5                              | <i>Haja Coração, Special Edition</i>      | Globo   | Brazil            | Telenovela/Romantic Comedy  | 68                               | Prime Time | 25     | 40.1  |
| 6                              | <i>Pega-Pega, Special Edition</i>         | Globo   | Brazil            | Telenovela/Romantic Comedy  | 108                              | Prime Time | 22     | 36    |
| 7                              | <i>Um Lugar ao Sol</i>                    | Globo   | Brazil            | Telenovela/Drama            | 47                               | Prime Time | 21.1   | 36    |
| 8                              | <i>A Vida da Gente, Special Edition</i>   | Globo   | Brazil            | Telenovela/Drama            | 138                              | Afternoon  | 20.6   | 34.8  |
| 9                              | <i>Flor do Caribe, Special Edition</i>    | Globo   | Brazil            | Telenovela/Drama            | 50                               | Afternoon  | 20.5   | 36.5  |
| 10                             | <i>Laços de Família Rerun</i>             | Globo   | Brazil            | Telenovela/Drama            | 66                               | Afternoon  | 19.9   | 39.7  |
| Total domestic productions: 10 |   |         |                   | Foreign Original Scripts: 0 |                                  |            |        |       |

Source: Kantar Ibope Media - 15 markets and Obitel Brazil

The list of the ten most watched titles registers the interesting fact of having more reprised titles than unreleased ones, a consequence of the pandemic. In 2020, the number was six reruns and four unreleased productions and in 2021 one more rerun entered the list. Table 6 shows all the titles of reruns chosen by Globo to fill the grid in 2021: *A Força do Querer* (2017), *Império* (2014), *Haja Coração* (2016), *Pega-Pega* (2017), *A Vida da Gente* (2011), *Flor do Caribe* (2013) e *Laços de Família* (2000). However, unlike 2020, the first place was not a rerun, but the unreleased second part of *Amor de Mãe*. In 2021, another interesting fact was that the telenovela dominated alone as the most watched format on open TV, with 100% of the titles, as well as all productions still belonging to Globo.

In comparison with data from the previous year, audience ratings fell. *Amor de Mãe*, the first telenovela to show unreleased chapters at 9 pm, guaranteed a good audience, registering 30,9 points, while *Fina Estampa*, the first place of 2020, reached the mark of 31 points. The other nine titles of 2021 showed a greater drop, in all placements, with the last four registering the lowest *ratings* within the historical series of Obitel, with an average of 20.5 points. One hypothesis for this general drop in audience is the spectators' saturation with reruns and consequent lack of premieres. *Fina Estampa* achieved good ratings for having been the first one to be broadcast in

the pandemic period, that is, it was a novelty for the public even though it was a re-run. As for genres, 70% are dramas and 30% are romantic comedies, with the former being characteristic of high *prime time*.

**TABLE 6a. The ten most watched domestic titles in 2021**

Table 6a does not apply, since all the ten most watched titles in Brazil in 2021 are domestic and from TV Globo.

**TABLE 7. Audience profile of the ten most watched titles: gender, socioeconomic status, and age group**

|    | Title                                     | Channel | Gender % |      | Socioeconomic status % |      |      |
|----|---|---------|----------|------|------------------------|------|------|
|    |   |         | Women    | Men  | AB                     | C    | DE   |
| 1  | <i>Amor de Mãe</i>                        | Globo   | 63.4     | 36.6 | 30.8                   | 49.5 | 19.7 |
| 2  | <i>A Força do Querer, Special Edition</i> | Globo   | 59.8     | 40.2 | 48.3                   | 48.6 | 3.1  |
| 3  | <i>Império, Special Edition</i>           | Globo   | 62.7     | 37.3 | 30.4                   | 48.8 | 20.8 |
| 4  | <i>Salve-se Quem Puder</i>                | Globo   | 56.3     | 43.7 | 54.2                   | 37.1 | 8.7  |
| 5  | <i>Haja Coração, Special Edition</i>      | Globo   | 53.4     | 46.6 | 44.2                   | 53.8 | 2.1  |
| 6  | <i>Pega-Pega, Special Edition</i>         | Globo   | 64.6     | 35.4 | 26.9                   | 49.7 | 23.3 |
| 7  | <i>Um Lugar ao Sol</i>                    | Globo   | 62.7     | 37.3 | 30.0                   | 48.7 | 21.3 |
| 8  | <i>A Vida da Gente, Special Edition</i>   | Globo   | 67.4     | 32.6 | 27.8                   | 50.1 | 22.1 |
| 9  | <i>Flor do Caribe, Special Edition</i>    | Globo   | 63.9     | 36.1 | 57.3                   | 41.7 | 1.0  |
| 10 | <i>Laços de Família Rerun</i>             | Globo   | 66.0     | 34.0 | 66.5                   | 29.7 | 3.9  |

|    | Title                                     | Channel | Age Group |          |          |          |          |      |
|----|---|---------|-----------|----------|----------|----------|----------|------|
|    |   |         | 4 to 11   | 12 to 17 | 18 to 24 | 25 to 34 | 35 to 49 | 50+  |
| 1  | <i>Amor de Mãe</i>                        | Globo   | 4.8       | 4.5      | 5.9      | 11.5     | 25.3     | 48.0 |
| 2  | <i>A Força do Querer, Special Edition</i> | Globo   | 3.2       | 7.2      | 5.6      | 15.6     | 35.6     | 32.8 |
| 3  | <i>Império, Special Edition</i>           | Globo   | 4.5       | 4.2      | 5.6      | 10.9     | 24.3     | 50.6 |
| 4  | <i>Salve-se Quem Puder</i>                | Globo   | 4.1       | 9.3      | 3.9      | 15.2     | 28.7     | 38.8 |
| 5  | <i>Haja Coração, Special Edition</i>      | Globo   | 4.8       | 5.6      | 1.9      | 16.9     | 36.0     | 34.8 |
| 6  | <i>Pega-Pega, Special Edition</i>         | Globo   | 4.7       | 4.2      | 5.1      | 10.6     | 23.2     | 52.2 |
| 7  | <i>Um Lugar ao Sol</i>                    | Globo   | 3.9       | 3.6      | 5.4      | 10.5     | 24.0     | 52.6 |
| 8  | <i>A Vida da Gente, Special Edition</i>   | Globo   | 4.6       | 4.3      | 5.6      | 10.4     | 22.2     | 53.0 |
| 9  | <i>Flor do Caribe, Special Edition</i>    | Globo   | 5.1       | 3.5      | 3.2      | 10.6     | 28.4     | 49.1 |
| 10 | <i>Laços de Família Rerun</i>             | Globo   | 3.7       | 4.1      | 4.8      | 7.8      | 40.6     | 39.0 |

Source: Kantar Ibope Media - 15 markets

Women continue to be the main audience of the top 10 fictions, mostly in exhibitions that take place in the afternoon and from 6 p.m. to 7 p.m., as can be observed with *A Vida da Gente*, *Laços de Família* e *Pega-Pega*. All of these titles are reruns, unlike the titles most watched by women in 2020 which were all unreleased. Among the favorite fictions of the male audience, an unprecedented fact appeared: the title with the highest audience was *Haja Coração*, 7 p.m. telenovela, which is usually one of the fictions of the high *prime time*.

*Haja Coração* was also the most watched production by the C-Class. The DE class maintains its preference for the romance and comedy genres, with *Pega-Pega* as the most watched one. The AB class, on the other hand, maintains its preference for dramas, however in 2021 the most watched title by this class was the comedy *Salve-se Quem Puder*. As for the age group, once again the audience over 50 years old was the one that most consumed fictions, with emphasis on plots aired at 6 p.m. and 7 p.m. that favor melodramatic matrices, with *A Vida da Gente* as the most watched one.

Despite the difficulties arising from the pandemic, 2021 was the year of the resumption of recordings and the release of new titles and showed an improvement in most of the data compared to 2020. Brazilian open television continues to be the most watched by the public, in front of *streaming* platforms, as we will show in the next topic. TV Globo continues its isolated leadership, producing all 10 of the year's highest-rated titles. In Brazil, open TV is still the greatest audiovisual power when it comes to fictional narratives.

### 3. VoD Monitoring 2021

The *streaming* market in Brazil, in 2021, consolidates itself as one of the largest in the world, and the number of users continues to grow. The crisis in audiovisual still has reflections, but the increase in domestic premieres on VoD platforms, the consolidation of services and the arrival of new *players* demonstrate the country's market potential.

#### 3.1. VoD platforms market in 2021

In 2021, 57% of the Brazilian population had connected TV<sup>32</sup>. With 64.58%, Brazil is the second country with the highest number of individual subscribers to *streaming*<sup>33</sup> platforms, the world average for subscriptions being 55%<sup>34</sup>. The *streaming* audience is second only to TV Globo's audience<sup>35</sup>. On the other hand, Netflix is subscribed by 81% of Brazilians, Amazon Prime Video being the second place with 46%; while

<sup>32</sup> Kantar Ibope Media, Target Group Index.

<sup>33</sup> Survey conducted among 18 countries by *Finder*, a *streaming* measurement company. The first country is New Zealand. The survey also reports that 35.42% of the Brazilian population does not have any *streaming* service. <https://www.finder.com/br>

<sup>34</sup> Cf. <https://bit.ly/3lmlfvW>

<sup>35</sup> Cf. <https://bit.ly/3Lvxd1Z>

Disney+ (21%) and Globoplay (20%) are technically tied for third<sup>36</sup>.

Between 2020 and 2021 there was a 50% increase in new subscriptions<sup>37</sup>, due to the isolation caused by Covid-19 that transformed the ways of consuming VoD. With more time at home, Brazilians sought alternatives to open TV, which programming was taken over by news about the pandemic, reruns of telenovelas and reality shows. In the same survey, about 80% stated that they do not intend to cancel their subscriptions.

With the market heated up in 2021, two new VoD platforms arrived in Brazil: HBO Max and STAR+. The former belongs to the Warner Media group and was launched throughout Latin America and the latter is part of the Disney group and was not integrated into the Disney+ platform in Brazil<sup>38</sup>.

Domestic production shows a relevant role in the context of audiovisual platforms, considering telenovelas produced in the past by SBT, such as *Carrossel* (2012) *Carinha de Anjo* (2016) e *Chiquititas* (2015), which were among the most watched productions on Netflix, as well as the partnership signed between Globoplay and Sony for series production; in addition to Globoplay's partnerships with TV Globo and with several closed channels belonging to Grupo Globo.

### **3.2. Offer of local VoD platforms in 2021 (domestic, regional within of the country)**

VoD had already been growing worldwide, but the impacts of the pandemic made it possible for an even greater increase.

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<sup>36</sup> Data from Panorama Mobile Time/Opinion Box. <https://www.mobiletime.com.br/pesquisas/>.

<sup>37</sup> Data from NZN Intelligence's research . <https://bit.ly/38Tu6CE>

<sup>38</sup> Cf. <https://bit.ly/3F1ILrq>.

**TABLE 8. Domestic fictions and co-productions exhibited  
in 2021 on VoD systems**

| Premiere domestic titles on VoD  | Ibero-American premiere titles on VoD   | Obitel countries' premiere co-productions on VoD   |
|--|---|--|
| <p><b>Globoplay - 33 titles</b><br/> <i>Riacho Doce</i> (Miniseries) - 1st season<br/> <i>Rotas do Ódio</i> (Series) - 1st season<br/> <i>Rotas do Ódio</i> (Series) - 2nd season<br/> <i>Rotas do Ódio</i> (Series) - 3rd season<br/> <i>Chocolate com Pimenta</i> (Telenovela)<br/> <i>Porto dos Milagres</i> (Telenovela)<br/> <i>O Bem Amado</i> (Telenovela)<br/> <i>Filhas de Eva</i> (Series) - 1st season<br/> <i>Vamp</i> (Telenovela)<br/> <i>Mulheres de Areia</i> (Telenovela)<br/> <i>Os Maias</i> (Miniseries) - 1st season<br/> <i>Unidade Básica</i> (Series) - 1st season<br/> <i>Unidade Básica</i> (Series) - 2nd season<br/> <i>Perrengue</i> (Series) - 1st season<br/> <i>Um Contra Todos</i> (Series) - 4th season<br/> <i>Onde está meu coração</i> (Series) - 1st season<br/> <i>Mulheres Apaixonadas</i> (Telenovela)<br/> <i>Sassaricando</i> (Telenovela)<br/> <i>Sessão de Terapia</i> (Series) - 4th season<br/> <i>A Gata Comeu</i> (Telenovela)<br/> <i>Hilda Furacão</i> (Miniseries)<br/> <i>Malhação</i> (Telenovela)<br/> <i>A Viagem</i> (Telenovela)<br/> <i>Era Uma Vez</i> (Telenovela)<br/> <i>Segunda Chamada</i> (Series) - 2nd season<br/> <i>Vereda Tropical</i> (Telenovela)<br/> <i>Rotas do Ódio</i> (Series) - 4th season<br/> <i>Renascer</i> (Telenovela)<br/> <i>Vlog da Berê</i> (Series) - 2nd season<br/> <i>Verdades Secretas II</i> (Miniseries)<br/> <i>Bebê à Bordo</i> (Telenovela)<br/> <i>Cama de Gato</i> (Telenovela)<br/> <i>O Salvador da Pátria</i> (Telenovela)<br/> <b>Prime Video - 12 titles</b><br/> <i>Um Contra Todos</i> (Series) - 4th season<br/> <i>Dom</i> (Series) - 1st season<br/> <i>Manhãs de Setembro</i> (Series) - 1st season<br/> <i>Impuros</i> (Series) - 1st season<br/> <i>Impuros</i> (Series) - 2nd season<br/> <i>Impuros</i> (Series) - 3rd season<br/> <i>#Mechamadebruna</i> (Series) - 1st season<br/> <i>#Mechamadebruna</i> (Series) - 2nd season<br/> <b>GLADRO 17</b><br/> <i>#Mechamadebruna</i> (Series) - 3rd season</p> | <p><b>Netflix - 24 titles</b><br/> <i>Um Mágico Nada Incrível</i> (Series, Colombia) - 2nd season<br/> <i>Elite</i> (Series, Spain) - 4th season<br/> <i>Elite Histórias Breves: Carla Samuel</i> (Miniseries, Spain) - 1st season<br/> <i>Elite Histórias Breves: Guzmán Caye</i> (Miniseries, Spain) - 1st season<br/> <i>Rebbe</i> (Miniseries, Spain) - 1st season<br/> <i>Elite Histórias Breves: Nadia Guzmán</i> (Miniseries, Spain) - 1st season<br/> <i>Elite Histórias Breves: Omar Ander Alexis</i> (Miniseries, Spain) - 1st season<br/> <i>Elite Histórias Breves: Patrick</i> (Miniseries, Spain) - 1st season<br/> <i>Elite Histórias Breves: Philip Caye Felipe</i> (Miniseries, Spain) - 1st season<br/> <i>Elite Histórias Breves: Samuel Omar</i> (Miniseries, Spain) - 1st season<br/> <i>Hache</i> (Series, Spain) - 2nd season<br/> <i>La Casa de Papel</i> (Series, Spain) - 2nd season<br/> <i>O Inocente</i> (Series, Spain) - 1st season<br/> <i>O Tempo Que Te Dou</i> (Miniseries, Spain) - 10th season<br/> <i>O Vizinho</i> (Series, Spain) - 2nd season<br/> <i>Sky Rojo</i> (Series, Spain) - 1st season<br/> <i>Valéria</i> (Series, Spain) - 2nd season<br/> <i>Luis Miguel: A Série</i> (Series, United States) - 2nd season<br/> <i>Luis Miguel: A Série</i> (Series, United States) - 3rd season<br/> <i>A Vingança das Juanas</i> (Series, Mexico) - 1st season<br/> <i>Control Z</i> (Series, Mexico) - 2nd season<br/> <i>Mãe só tem duas</i> (Series, Mexico) - 1st season<br/> <i>Monarca</i> (Series, Mexico) - 2nd season<br/> <i>Quem matou Sara?</i> (Series, Mexico) - 1st season<br/> <i>Quem matou Sara?</i> (Series, Mexico) - 2nd season<br/> <b>HBO Go/Max - 8 titles</b></p> | <p><b>Netflix - 1 title</b><br/> <i>Narcos: Mexico</i> (Series, United States and Mexico) - 3rd season</p> |

Source: Obitel Brazil

According to the table above, 99 titles were released in the VoD market in 2021, versus 71 the previous year, a growth of 39.4%. For the second consecutive year, Brazilian productions surpassed those of Ibero-American countries, while Brazil produced 51 titles (51.5%), Ibero-American countries produced 48 titles (48.5%), being only one co-production.

The premieres of domestic titles (51) increased by 37.8% compared to 2020 (37), which confirms the virtuous dynamics of Brazilian production. They were exhibited, in order, on the following platforms: Globoplay (33), Prime Video (12), Box Brasil Play (2), Disney+ (2) and Netflix (2).

Globoplay increased its portfolio of domestic titles by 73.7%, releasing 33 titles compared to 19 the previous year - including the serial fictions produced for open TV and premiered on VoD. And as in 2020, it remained as the main *streaming* platform of premiere domestic fictions. On Globoplay, *Verdades Secretas II* was the first telenovela of Globo produced for *streaming*, accumulating 1,988,342 hours of playback the day after the premiere<sup>39</sup>. Also noteworthy for the release of “classic” telenovelas already exhibited on TV Globo, such as *O Bem-Amado* (1973), *Porto dos Milagres* (2001) e *Chocolate com Pimenta* (2003).

Prime Video premiered 12 titles, 7 more than in 2020, a remarkable increase of 140%. One of the main bets was the partnership with Conspiração Filmes for the production of *Dom*, a police drama, whose success led to the confirmation of a second season.

Netflix presented a strong reduction in its domestic production, from seven to two titles in 2021, a drop of 71.4%, which can be credited to the crisis that shakes the platform, with the global loss of subscribers. The two titles were *Cidade Invisível*, detective series and fantastic realism, and the children’s telenovela *As Aventuras de Poliana* (SBT, 2018-2020).

Regarding Ibero-American titles, 48 were premiered on VoD, which represented an increase of 71.4% compared to the year of 2020 (28), a growth never seen in the country’s *streaming* market, accompanied by greater diversification of producing countries. In 2020, all titles came from Spain and, although the majority of titles continue to be from this country (25), there were entries from Mexico (12) and Argentina (5) as shown in Table 10. The platforms that most premiered Ibero-American fictions were, in order: Netflix (25), HBOMax (8), Globoplay (6), Disney+ (5) and Prime Video (4). It is noteworthy that Netflix was the only platform that premiered a co-production with Obitel countries, in 2021, *Narcos: Mexico* (United States and Mexico, Season 3).

A theme sensitive to productions for *streaming* is the type of contract signed with independent production companies. Three models stand out: original production by the *streaming* platform, where it centralizes the development of the work and

<sup>39</sup> Cf. <https://bit.ly/3x6I1P2>

can impose its conditions; licensing, where there is not much involvement in the production, and the responsibility lies more with the producer; and co-production, with more unique characteristics. As the Brazilian market was established without the government defining how to regularize, categorize and tax VoD services, the advances of international experiences have been a reference.

#### 4. Interactivity and audience participation<sup>40</sup>

The year of 2021 was a year of resumption in the production of fiction by television stations. There were premieres, especially as of the second half of the year<sup>41</sup>, but reruns remained on the schedule grids<sup>42</sup>. Even so, the interaction of the public was active on social networks.

With the arrival of HBOMax and Star+ there was an increase in content<sup>43</sup>, however, Netflix remained dominant in both subscriber numbers and engagement.<sup>44</sup> *Round 6* (2021) broke all viewing records<sup>45</sup> and the series *Elite* (2021), the platform's Spanish production, was responsible for the largest number of comments on Twitter in Brazil. In truth, "people use social networks to find others with similar interests and keep contacts. The *streaming*, platforms are now links in the network" (Arditi, 2021, p. 99-100, free translation). They are also technical mediations that produce new ways of communicating, exchanging experiences and producing content, that is, "a movement that crosses and displaces culture" (Martín-Barbero, 2002, p. 228).

The telenovela began to be aired as a *closed work*, with all chapters already recorded. This new format was adopted in *Nos Tempos do Imperador* (Globo, 2021), but with the public's negative repercussion, texts were rewritten and re-recorded<sup>46</sup>, showing the relevance of dialogue with the public.

##### 4.1. Social interactivity

In 2021, TV Globo promoted initiatives to renew the relationship with the public. In December, in the traditional campaign *Hoje É Um Novo Dia*, the TV station launched on its website *Eu Na Globo* a filter for mobile phones in which the user recorded their face and was digitally superimposed over the face of one of the artists

<sup>40</sup> The topic adopts the distinction between the concepts of *interactivity* and *participation* made by Jenkins (2008), for assuming very different meanings. Interactivity is the set of production strategies to control the audience of a product, whereas participation are audience strategies created for their uses of media products.

<sup>41</sup> Cf. <https://bit.ly/3N3nSPi>.

<sup>42</sup> Reruns have a particular meaning within the "telenovela culture" that has historically been created in the country. They go beyond simple re-watchings and are part of the cultural and media memory of the country. Regarding the reruns of successful telenovelas as "Special Edition" in prime time on TV Globo, in 2020 and 2021, we call them *pandemic format* and they were analyzed in the Obitel 2021 Yearbook (Lopes, Santos et al.),

<sup>43</sup> Cf. <https://bit.ly/3LXLXXu>.

<sup>44</sup> Cf. <https://bit.ly/3LY3v5V>.

<sup>45</sup> Cf. <http://glo.bo/3L07n4S>.

<sup>46</sup> Cf. <https://bit.ly/37t42xE>.

presents<sup>47</sup>. The sense effects of this inclusion recreated the imagery of the traditional end-of-year campaign, making the public literally see themselves in the middle of their idols.

Another similar device was used by TV Globo to promote the telenovela *Um Lugar ao Sol*. In allusion to the thematic recurrence of twins, the face of actor Cauã Reymond was digitally applied in scenes from other telenovelas such as *Mulheres de Areia* (1993)<sup>48</sup> and *Paraíso Tropical* (2007)<sup>49</sup>, carrying out the dialogue of a 2021 telenovela with national memory. The station also announced the creation of *Nov-elei*<sup>50</sup> (premiering in 2022), the first commercial project with YouTube: it is a series that brings together artists and digital influencers to recreate classic telenovelas in a parallel universe where they never existed.

#### 4.2. Audience participation

In 2021, the repercussion of the new telenovela format found ample space in Facebook groups. We identified the existence of at least 25 of them whose titles evoked *Um Lugar Ao Sol* and that proposed to offer summaries and discussion forums. The largest one of them, called *Um Lugar ao Sol* (All about Globo's telenovelas)<sup>51</sup> had about 223.6 thousand members.

The same phenomenon occurred in the Chico Barney Group<sup>52</sup>, responsible for television affairs coverage, with 12.9 thousand members, where for each chapter of *Um Lugar Ao Sol* a new topic was created. In all, there were 148 publications tagged with the hashtag #UmLugarAoSol. On YouTube, channels and videos like *Will Um Lugar Ao Sol be the A Usurpadora of Globo?* (66,000 views) and *Is Um Lugar Ao Sol a failure?* (69,000 views) expand the critical perspective of audience participation.<sup>53</sup>

#### 5. Highlights of the year

The resumption of recordings was marked by insecurity, stricter health protocols and a new suspension with the arrival of the omicron variant of Covid-19. Thus, we had a year made of intermittent stops and *closed* telenovelas. This scenario defined the year's most outstanding in the country.

<sup>47</sup> Cf. <https://bit.ly/3GF0B3X>

<sup>48</sup> Cf. <https://bit.ly/3M7QZzQ>

<sup>49</sup> Cf. <https://bit.ly/3x3RUNr>

<sup>50</sup> Cf. <https://bit.ly/3PTFNdf>

<sup>51</sup> This group has the characteristic of changing its nomenclature with each new telenovela shown. In this way, it referred to *Um Lugar Ao Sol* in its title, from November 7, 2021 until March 2022, when it was renamed *Pantanal* (All about Globo's telenovelas).

<sup>52</sup> From the journalist of the same name whose column is hosted on the Splash channel of the Uol news website.

<sup>53</sup> We cannot fail to mention the extraordinary production and circulation of content on platforms by YouTubers, TikTokers, Twitch *streamers* and Instagram *influencers*, which in itself would deserve special study.

### The “post”-pandemic fictions *Nos Tempos do Imperador*, *Salve-se Quem Puder*, *Quanto Mais Vida Melhor*: the resumption challenges

With the worsening of the pandemic and the return of restrictions, TV Globo’s recordings were again suspended. The measure interfered in the production of unreleased telenovelas such as *Nos Tempos do Imperador*, *Quanto Mais Vida Melhor*, *Salve-se Quem Puder* and *Amor de Mãe*.

*Nos Tempos do Imperador* (Aug/09/2021 to Feb/04/2022) was the first unreleased telenovela produced during the pandemic and shown at 6 pm, with 150 chapters. The narrative was pre-recorded when it premiered and presented a young Brazil, 30 years after its independence, with the trajectory of Emperor Dom Pedro II at the head of the Brazilian Court. In its plot, the search for progress in the country, the struggle for the abolition of slavery and the experience of the first female Brazilian doctor in practice.

*Quanto Mais Vida Melhor* (Nov/22/2021 to May/27/2022) was a all scripted telenovela, aired at 7 p.m., with 161 chapters, mixing comedy and drama, in a light way. The narrative deals with four victims of a plane crash and their supernatural experience with Death. It was initially called *A Morte Pode Esperar*, but due to the tragedy of Covid-19, it had its name changed.

*Salve-se Quem Puder*, aired at 7 p.m., was interrupted on Mar/28/2020, after 54 chapters, and had the second half exhibited from May 17th to Jul/16/2021, with 53 new chapters. Comical and dramatic, the narrative featured three women who enter the Witness Protection Program after witnessing a crime.

*Amor de Mãe*, aired at 9 p.m., was interrupted by the pandemic. The first part was exhibited from Nov/25/19 to Mar/21/2020, with 102 chapters, and the second part, from March 15th to Apr/09/2021, with 23 unreleased chapters, totaling 125 chapters. The strategy adopted to recall the first part drew attention: a compact with scenes already recorded, but with the addition of *off-screen* narration by the three protagonists, for two weeks, with 30-minute chapters.

### Telenovelas and *streaming*

The relationship between telenovelas and *streaming* encourages us to think about the particularities and differences between the former and the series featured on Netflix, Prime Video or HBOMax – the last one even brought the term *teleseries*<sup>54</sup> to characterize the works under the supervision of Sílvio de Abreu<sup>55</sup>.

In May 2020, Globo announced the progressive release of 50 classic telenovelas<sup>56</sup> at Globoplay, constituting a *telenovela digital library*. In 2021, the company produced and aired its first telenovela for *streaming*: *Verdades Secretas II* featured 50 chapters, made available in blocks of 10 chapters every 15 days. This is the second

<sup>54</sup> Cf. <https://bit.ly/3KWfHmj>.

<sup>55</sup> Cf. <https://bit.ly/395qq0G>.

<sup>56</sup> Cf. <http://glo.bo/3Lc0Zbb>.

season of the original *Verdades Secretas*, aired on TV Globo in June 2015. The strategy<sup>57</sup> to release *Verdades Secretas II* seeks to avoid Netflix being the first to bring the format to *streaming*<sup>58</sup>.

There is a consensus that a telenovela on *streaming* should be shorter, with fewer cores and more subject to formal experimentation. Being a culturally relevant format for the expansion of the service in Brazil, it is expected that we will see the emergence of hybrid products and bets of interlocution between the traditional format and the series, with aesthetic and narrative renovations.

### **Casting layoffs at Globo and new business model**

Echoed by the media in 2021, “Globo’s layoffs” are embedded in its new business model, under structuring at least since 2019, which fundamentally marks the station as a “*media tech*”, with investments in technology, focusing on the advance of *streaming* in the country and in its international insertion. In addition to investing in the production of its own content, the company restructures itself aiming at “only one Globo”, with more flexible management, such as the actions of progressive closure of fixed (exclusive) contracts of its artistic cast, and the adoption of contract per work. If on the one hand this reduces operating expenses, on the other, it causes unprecedented changes in the labor market, with “ex-globals” signing projects for *streaming*, with independent production companies and even with other open and paid channels.

## **6. Theme of the year: Transformations in television seriality and its impact on the formats of Ibero-American television fiction in times of *streaming***

### **The seriality issue in *Um Lugar Ao Sol*, a transitional telenovela**

Aired on TV Globo between November 8th, 2021, and March 25th, 2022, *Um Lugar Ao Sol*<sup>59</sup> reveals how contextual and discursive factors alter seriality. With the exhibition originally scheduled for May 2020, not only has its premiere been postponed by the pandemic, but its narrative structure has also been altered, implying significant changes in the format. Its recordings resumed in August 2020 and again stalled in March 2021<sup>60</sup>, given a new outbreak of contagion behind the scenes, and was finished in September of the same year. We highlight that it was exhibited completely recorded, a fact never before seen on TV Globo. In addition, its duration was reduced, leaving it with only 119 chapters<sup>61</sup>, bringing to the scene a new format for telenovelas, both in formal and narrative aspects.

<sup>57</sup> Cf. <https://bit.ly/3996VUZ>.

<sup>58</sup> Cf. <https://bit.ly/3skRLCQ>.

<sup>59</sup> Telenovela by Licia Manzo, one of the new authors brought to prime time.

<sup>60</sup> Cf. <http://glo.bo/3FsYTCr>.

<sup>61</sup> Its narrative was entirely recorded with 107 chapters and re-edited to 119 chapters in order to extend the premiere of its successor, *Pantanal*, which experienced contamination problems.

Its exceptionality makes it an interesting case for the debate on seriality: it became the unreleased successor to *Amor de Mãe*, *pandemic telenovela*, and immediate predecessor to the remake of the *iconic Pantanal* (TV Manchete, 1990), TV Globo's big bet for the resumption. It was agreed in the specialized press to recognize in *Um Lugar Ao Sol* a condition of transition, as if the TV station were willing to relegate it to a second plan<sup>62</sup>. Indeed, *Um Lugar Ao Sol* has not thrilled the public<sup>63</sup> and obtained low audience ratings<sup>64</sup> for the prime time average. However, it turned out to be an *innovative telenovela*, and from the point of view of its formal and narrative aspects, we point out some elements to reflect how the innovations in its seriality contributed to its low repercussion.

According to Buonanno (2019), seriality would be constituted in the synergistic interaction between production, distribution and consumption of narratives in progress, of which segmented articulation is purposefully designed to feed a distribution system and provoke acts of assistance that follow the dynamics of a time of repeated and forced interruption. What has been called the “Netflix paradigm” would be the denial of the strategic role of interruption, in favor of an uninterrupted narrative, implying a disruption of temporal experience.

The Brazilian telenovela is a long-serialized format, in which the serialized form harmonizes with the understandings of life and time shared by the receivers. The centrality of the temporal system that structures the serial narrative of the telenovela is crucial to the meaning-making process. Besides that, we define it as a *composite* format for its ability to bring together diverse genres in a single narrative.

### Formal aspects

The plot of *Um Lugar Ao Sol* begins with Christian (Cauã Reymond) changing identities, who assumes the life of his twin Renato, from whom he had been separated in childhood. While Renato had a wealthy life in Rio de Janeiro, Christian, raised in an orphanage, found himself restrained by the lack of opportunities. The narrative leads Christian to find himself at the right time and place to assume his brother's identity, and by making this choice (and incurring the crime of criminal misrepresentation), he begins to walk a path of professional success but personal unhappiness.

The cores of *Um Lugar Ao Sol* can be divided into two: the family of Santiago (José de Abreu) – in which Chris/Renato enters after marrying Bárbara (Alinne Moraes), Santiago's daughter and fiancée of his dead brother – and the restaurant of Dona Noca (Marieta Severo), in Méier, where his granddaughter Lara (Andrea Horta), Chris' ex-girlfriend, is the chef. The scenes of *Um Lugar Ao Sol* were mostly internal and were recorded with social distancing protocols and limited actors on set<sup>65</sup>.

<sup>62</sup> Cf. <https://bit.ly/3vVNWpE>.

<sup>63</sup> Cf. <https://bit.ly/3kSsGej>.

<sup>64</sup> Cf. <https://bit.ly/3yqHZTw>.

<sup>65</sup> Cf. <https://bit.ly/3soJ8XD>.

We observe in *Um Lugar Ao Sol* the reuse of some scenarios<sup>66</sup> from its predecessor *Amor De Mãe*, among them: lawyer Vitória's house (Taís Araújo); Dona Lourdes' house (Regina Casé); and the scenic viaduct that represented the suburb. The shot favored a slightly experimental lighting: a blue-green light marked details of the scene, offering a lyrical layer for realistic situations.

Another formal highlight were the moments when Rebecca (Andréa Beltrão) *broke the fourth wall*<sup>67</sup> and looked directly into the camera, as if sharing a comment with the audience. Rebecca's gaze marked a certain awareness of the character that she was that being watched in her *anti-establishment* actions.

### Narrative aspects

In general, each chapter of a telenovela spends one or two days in fictional time, and, at the discursive level, "the narrative dimension of the telenovela requires repetition and redundancy of information" (Pallottini, 1998, p.63). Certain subjects are presented and retrieved throughout the plot in order to recover the memory of the spectators or present the story to those who did not follow it (Pallottini, 1998; Abrão, 2018). In short, "seriality simultaneously compresses and expands the temporal experience of a text" (Williams, 2018, p.170). In this way, we highlight in *Um Lugar Ao Sol* the repeated use of ellipsis as a singular narrative element. That is: the omission of scenes implied by context or situation breaks with the traditional way in which telenovelas tell temporality in their stories. And, as Buonanno (2019, P.50) reiterates, "time and its conception are fundamental to seriality". *Um Lugar Ao Sol* suppressed transition scenes and replaced key scenes with character lines – such as the helicopter crash that killed Túlio (Daniel Dantas) and his mistress Ruth (Patty De Jesus), informed to the audience by a conversation between Bárbara and Renato. This ellipsis figure requires of the audiences "cognitive gymnastics that contributes to problem-solving skills and observation skills" (Mittell, 2012, p. 35). Nevertheless, its use was present among the chapters, through which many years and different phases passed, suggesting a certain agility and alternating diegetic temporality

*Um Lugar Ao Sol* was extended<sup>68</sup> in order to postpone the premiere of *Pantanal*, and as a result suffered daily cuts of up to 10 minutes, losing the hooks of each chapter. Therefore, by breaking with "time and its conception [which] are fundamental to seriality" (Buonanno, 2019, p. 50), TV Globo may have dilapidated *Um Lugar Ao Sol* and contributed to its failure with the receivers. The negative reaction of the public, imbued with a *habitus* of serial reception, leads us to affirm that this involves not only aesthetic or commercial choices of authors and producers, but also the *pace of reception* (Lopes; Borelli; Resende, 2002) between the telenovela and its audience,

<sup>66</sup> Cf. <https://bit.ly/3Fuw48w>.

<sup>67</sup> Cf. <http://glo.bo/3kZOW5K>.

<sup>68</sup> Cf. <https://bit.ly/3Plxjfl>

reinforced by its folhetinesque and serialized matrix. Without reasserting – or subverting – the *cultural matrix of melodrama* (Martín-Barbero, 1987) that embeds this contract, it is licit to think that the audience, faced with ellipsis or temporal jumps, ceases to be interested in what they are watching and considers the story “poorly told”. Also, Mittell (2012, p. 48) recognizes that the “need for the public to acquire competence in decoding diegetic stories and worlds is particularly relevant for a part of the media [...]. In this way, narratively complex television encourages and [...] needs a new model of audience engagement”.

Such model, however, does not necessarily denote openness to other formats, as in the case of pre-recorded Brazilian telenovelas, which lose its central characteristic of being an “open work”, with which the public is used to interacting, even changing the directions of plots and characters, since its production conditions the recordings to the reactions of the audience (today, present mainly on social networks). If on the one hand the *streaming* can imply ruptures and innovations in the ways of telling stories in telenovelas, it is noticeable that the format finds limits and restrictions that characterize it from the point of view of production, and also of reception and the cultural matrices on which it is based.

Finally, in addition to the effects of an extemporaneous seriality, *Um Lugar Ao Sol* contributed to reaffirming the telenovela as a *narrative of the nation* (Lopes, 2003), presenting conflicts centered on social inequalities and behavioral changes in the country, treated in a script sensitive to subjectivities. In its central discourse, those who are alienated from opportunities are often pushed into opportunistic illegal paths - and class, generational and gender prejudices can be deconstructed. It brought believable and complex characters and reiterated that tolerance must prevail in the face of new family, gender and class arrangements. It was an *innovative telenovela* that advanced Brazilian TV dramaturgy.

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