

# BRAZIL: THE COMPLEXITY OF BRAZILIAN TELEVISION FICTION BETWEEN THE NATIONAL AND THE INTERNATIONAL<sup>1</sup>

DOI: <https://doi.org/10.7764/obitel.23.e.bra>

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## Introduction

The year 2022 was historic for Brazil. The election of Luis Inácio Lula da Silva and the defeat of the Bolsonaro government (2019-2022) marked the return of democracy to the country. In recent years, we have witnessed the dismantling of ministries and the installation of a populist state with a government policy supported by *misinformation* (fake news distributed by certain press agencies and social networks), *negationism* (confrontation with science and especially the COVID-19 vaccine), and hate speech (discrimination and exclusion of racial, gender, class, sexual orientation).

It is against this background that this chapter describes the approaches adopted to understand the media and fictional television production in 2022. To achieve this, an expanded vision was employed to understand the complexity of its numerous dimensions. This year, efforts will be made towards the recovery of the national, regional and local audiovisual sector and its relations with the international streaming platforms existing in the country.

The expectations of Lula's victory and the end of the Bolsonaro government, in addition to the added scrutiny of an election year, are directly linked to a slow but progressive return of the State to investing in the audiovisual sector. Ancine (National Film Agency) made new calls for submissions regarding TV and VoD in 2022.

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<sup>1</sup> The Obitel Brasil team thanks Kantar Ibope Media, whose kindly provided information made the analysis presented herein possible.

## 1. The Audiovisual Context of Brazil in 2022

### 1.1. Broadcast television in Brazil

**Table 1. National broadcast television stations in Brazil in 2022**

<b>Private broadcasters (5)</b>	<b>Public broadcasters (2)</b>
TV Globo <sup>2</sup>	TV Brasil
TV Record	
SBT	TV Cultura
TV Band	
Rede TV!	
<b>TOTAL NUMBER OF BROADCASTERS = 7</b>	

Source: Obitel Brazil

The Brazilian television system consists of seven national television networks; five of them private, and two of them public.

<sup>2</sup>To better describe the complexity of the Brazilian television sector, we will adopt the following nomenclature in the case of Globo: GLOBO for the media and communication Globo Group and TV GLOBO for the Globo Group broadcast channel.

**Graph 1. TV audience and share by broadcaster in 2022**

<b>Broadcaster</b>	<b>Home audience</b>	<b>Audience (%)</b>	<b>Share TLE (%)</b>
TV Globo	11.7	46.6	33.8
TV Record	3.8	15.1	11.0
Pay TV	3.5	13.9	10.2
SBT	3.1	12.4	9.1
TV Band	1.0	4.0	3.1
OCA	0.7	2.8	2.1
TV Brasil	0.3	1.2	0.9
RedeTV!	0.3	1.2	0.8
Others	0.7	2.8	0.0
<b>TOTAL</b>	<b>25.1</b>	<b>100.0</b>	<b>70.95</b>

Source: Kantar Ibope Media - Obitel Brazil

As for the audience, there has been a slight increase in broadcast TV, with 21.6 points against 21.4 in 2021, reversing the gradual fall of recent years. TV Globo remains the leader, with 11.7 rating points - 0.1 point more than in 2021 - and a *share* of 33.8, growth of 1.6% compared to the previous year.

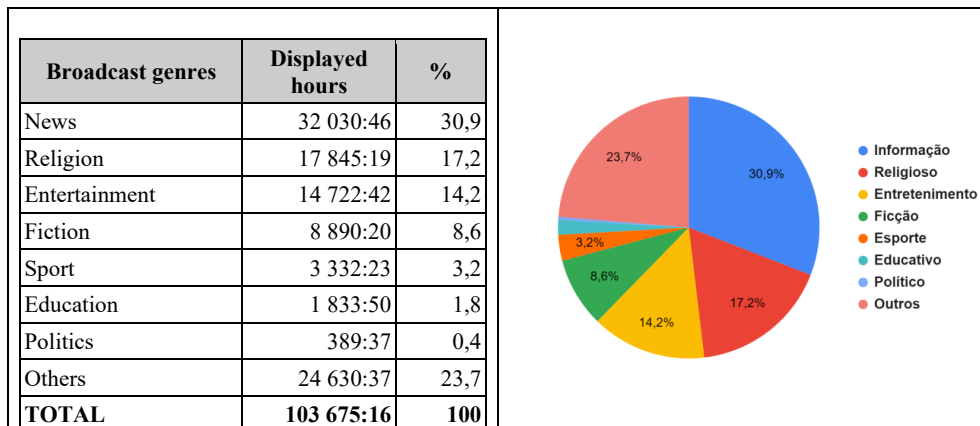
In the fight for the second place in ratings, Record maintained its position, with a drop of 0.6 point in relation to 2021. SBT was third, with 3.1 and also a small fall of 0.5. On the one hand, there was a yet small increase in the broadcast TV ratings; on the other hand, pay TV reaffirmed its downward trend in the country, with a reduction of 1.1 points and a contraction of 7.2% in 2022<sup>3</sup>.

As for the media penetration scores<sup>4</sup>, the internet reached 90.8% and has been consolidating as the most popular among Brazilians. Broadcast TV penetration continued to fall, with a decrease of about 8% compared to the previous year. Print media, especially newspapers, showed a small increase of 1% in year of election coverage. Cinema recovered from 2.4% to 11.3% thanks to the reopening of the rooms after the pandemic and blockbuster movie premieres .

<sup>3</sup> According to data from December 2022 of Anatel (National Telecommunications Agency). <https://bit.ly/3oz5p6u>

<sup>4</sup> Media penetration scores comparing 2022 to 2021: Internet, 90.8% against 87.7%; Outdoor Media, 80.3% at 84.5; Open TV, 72.1% to 80%; Radio, 43.9% to 41.9%; Pay TV, 26.1% to 34.3%; Magazines, 6.56% to 6.2%; Newspapers, 6.29% to 5.2%; Cinema, 11.3% to 2.4%. Source: Kantar Ibope Media - Target Group Index.

**Graph 2. Genres and hours broadcast on TV programming in 2022<sup>5</sup>**



Source: Kantar Ibope Media - Obitel Brazil

There was a decrease of about 9% in the total number of hours broadcast on television, compared to the previous year, which can be attributed to the increasing competition of other platforms, notably streaming. As for gender performance, we highlight: (1) the maintenance of *Information* leadership, closely related to the journalistic coverage of the elections; (2) the maintenance of genre positions in relation to 2021; (3) despite maintaining their fourth place, the hours of *Fiction* sharply dropped from 12.4% to 8.6%, still reflecting the interruption of shoots and the use of reruns; (4) The great increase in *Politics* quadrupled the hours of air time in 2022 as that was a year of fierce electoral dispute.

<sup>5</sup> Genres: **Fiction:** Film, miniseries, telenovelas, series; **Entertainment:** auditorium, cars and engines, cooking, game show, comedy, children, musical, award show, reality show, shows; **Information:** debate, documentary, interview, journalism, news report; **Sports:** sports, soccer; **Religious:** educational; political; and **Others:** others, not included, rural, health, draw, teleshopping, travel and tourism. This final categorization was made by Obitel Brazil, based on Kantar Ibope Media categories.

## 1.2. Pay TV and VoD platforms in Brazil

**Table 2. Pay TV channels in Brazil**

The 10 most watched Pay TV channels in Brazil			
Channel	Genre	Origin	Rating (home audience)
SporTV	Sports	Brazil	0.21
VIVA	Fiction	Brazil	0.19
GloboNews	Information	Brazil	0.18
AXN	Fiction	Singapore	0.15
Universal TV	Fiction	United States	0.12
Cartoon Network	Children	United States	0.10
Discovery Chanel	Entertainment	United States	0.10
ESPN	Sports	United States	0.10
ESPN Brasil	Sports	Brazil	0.10
Premiere Clubes	Sports	Brazil	0.10

Source: Kantar Ibope Media

Of the 10 most watched channels on Paid TV, the SporTV had the highest audience. Its leading position can be linked to the World Cup in Qatar, as it owned the rights to air the world Cup Football. The VIVA channel, leader in the previous year, remains well positioned in second place, indicating the maintenance of the receivers interest in its fiction reruns. The GloboNews, a journalism channel, appears in the third place, which means the first three channels are Globo Group Pay TV. International channels remained practically the same among the 10 most watched, with fiction, children and entertainment content. Among the last three, there are sports channels in the year of World Cup football.

**Table 3. Most important VoD platforms in Brazil**

The 10 VoD platforms with the highest content
1. Amazon Prime Video
2. Netflix
3. Looke
4. Globoplay
5. DirecTV Go
6. HBO Max
7. Disney
8. STAR+ (Disney)
9. Box Brasil Play
10. Paramount+

Source: Ancine, 2022<sup>6</sup>

Table 3 lists the 10 platforms with the largest quantities of content operating Brazil. Seven of them are foreign and operate via subscriptions. Five of them are Brazilian, which is equivalent to 50% of the *top ten*: Globoplay, Looke, Globoplay, DirecTV Go, and Box Brasil Play. With the exception of the first, the other three work in the transactional model (TVoD), that is, they are pay-per-view programmers – they are paid only for the work to be watched.

Amazon Prime Video presented the largest number of titles released in 2022 in Brazil, more than 7.6 thousand titles, which is followed by Netflix, with 5.2 thousand premieres. In turn, Globoplay presented 3.8 thousand titles; HBOMax, 3.2 thousand; Disney+, 1.3 thousand; Star+, 1.1 thousand; and finally, Paramount+, with only 648 titles.

Of all catalogs, only 10.9% of the production is of Brazilian origin<sup>7</sup>. However, national production is well ranked if we think that Globoplay was created in 2015 and appears third in the number of titles in the country.

### 1.3. Funding sources for the audiovisual sector

After three years without public calls for audiovisual productions, in 2022, Ancine released a call whose contribution was R\$ 100,000,000.00 (about USD 20,000,000.00) – a relatively low value, given the absence of calls in previous years and the repressed demand for subsidized projects throughout Brazil. Among the call categories, one was destined to production for television and streaming, worths R\$ 10,000,000.00 (about USD 2,000,000.00).

<sup>6</sup> Ancine, *Panorama of the Demand Video Market in Brazil*, Brasilia, CGI/SRG, 2022. <http://bitly.ws/FxSS>

<sup>7</sup> Idem.

As in-person activities resumed, national and international fairs allowed new contacts and contracts to be made. In the 2022 Rio2C event, which returned after two years, there were 1,200 business rounds and 2,480 applications of projects for *pitching* focused on audiovisual, music, innovation<sup>8</sup>.

Funding through state and/or municipal funding agencies remains an important source, especially for small and medium-sized independent producers. In addition, there are permanent calls from private companies that contribute to cultural promotion in Brazil.

Another relevant source for independent producers is the advertising market, which moved R\$ 21.2 billion (about USD 4 billion) in 2022, an increase of 7% compared to 2021.

#### **1.4. Communication policies**

With the dismantle of communication sectors in the Bolsonaro management, Brazil lost its right to access true information and to dialogue with the government. According to the Report of the Technical Group of Social Communication<sup>9</sup>, made by the Government Transition Commission in December 2022, the throwback encouraged by disinformation caused damage to society in several areas, including public health issues, such as child vaccination and the fight against diseases practically extinct in Brazil until then.

The severity of this dismantle may be seen in two areas: Government Communication and Public Communication. In the first area, the Communications Secretary (Secom) was weakened; the instrumentalization of government communication; the lack of contracts in the digital communication area, and the fragile advertising contracts. In the second area, the changes in the public nature and deformation of programming of TV Brasil; the unification of TV Brasil and TV NBR<sup>10</sup>; the closing of TV Brasil Internacional<sup>11</sup>; the scrapping of the EBC radio system<sup>12</sup>; censorship and downsizing of Agência Brasil<sup>13</sup>; the reduction of autonomy and of institutional investment on collection<sup>14</sup>; the cancellation of calls to contract content of independent production companies.

Because 2022 was an election year, communication played a central role in the fight against misinformation<sup>15</sup>. According to the Superior Electoral Court (TSE), several fronts were created for checking content, promoting good practices in online media use, and raising awareness for rules and policies in the electoral process.

<sup>8</sup> <https://bit.ly/3C5fLhq>

<sup>9</sup> The report was produced by the working group together with organized civil society. <https://bit.ly/3CfdOiV>

<sup>10</sup> <https://tvbrasil.ebc.com.br>

<sup>11</sup> <https://memoria.ebc.com.br/tv-nbr>

<sup>12</sup> <https://bit.ly/437lajY>

<sup>13</sup> <https://radios.ebc.com.br/>

<sup>14</sup> <https://www.ebc.com.br/veiculos/agencia-brasil>

<sup>15</sup> <https://bit.ly/3MUkKIf>

Another important action was to equating digital platforms with newspapers, radios and TV channels. This was central to punish *fake news* also by social media such as Facebook, Twitter, and Instagram. Finally, the audiovisual industry experienced a period of recovery after Ancine made new calls for projects execution<sup>16</sup>.

### 1.5. Digital and mobile connectivity infrastructure

In the two COVID-19 pandemic years (2020-2021), several sectors in Brazil were impacted by the advancement of internet use. This indicator was stabilized in 2022. According to CETIC (Executive Committee on Information and Communication Technology)<sup>17</sup>, a government department that conducts annual research on the use of the internet in Brazil, the country is facing the challenge of achieving universalization of access through strategies for the digital inclusion of the most vulnerable population<sup>18</sup>.

Internet users in Brazil amount to 149 million (84% of the Brazilian population), and 80% of the households have access to the internet. Of these, 142 million users are connected almost every day, with a prevalence in classes A (93%) and B (91%) and, in lower proportions, in C (81%) and DE (60%).

According to the survey, 92 million Brazilians access the internet by mobile phone only. Regarding the most sought content, regardless of the device, more than half (51%) seek to verify the legitimacy of an information obtained in the online environment. When this is done via mobile phone, the percentage drops to 37%; and it increases among those connecting by multiple devices, such as computers and mobile phones (74%).

*Significant connectivity* is the possibility for users to get a better benefit from the internet. The CETIC 2022 survey revealed that the quality of the device is as important as a good network connection. In relation to 2021, the connection by the computer remained stable (38%) and the use of television to access the internet went up, going from 50% to 55%, and the TV was the second most used device to access the network in Brazil, only behind the mobile phone. The number of VoD penetration increased by 1% in 2022 reaching 40% of the consumers.

Streaming is part of the routine of 71% of Brazilians, who claim to be subscribers or have already subscribed to some kind of service. Currently, there is a predominance between two players: 91% of Brazilians either subscribe or have subscribed to Netflix, and 53% of them either subscribe or have subscribed to Amazon Prime Video. Other platforms mentioned in the survey were Globoplay (30%); Disney+ (26%); HBO Max (20%); Telecine Play (13%); YouTube Premium (9%); Star+ (8%); Paramount+ (6%); Apple TV (4%).

<sup>16</sup> <https://bit.ly/3MAzVoH>

<sup>17</sup> <https://www.cetic.br/>

<sup>18</sup> <https://bit.ly/3OGdKQG>

The survey also revealed that for 70% of the respondents, brand new content is the main reason for access to platforms, mainly movies and series. Among those who seem uninterested in brand new content, 44% of them pay attention to the series that everyone is talking about at the moment; 32% of them, classic films; 29% , documentaries; 26% , classic series that are no longer being aired; 16%, children's content; 10% of them, telenovela; 6%, anime; 5%, sports; and 3%, others<sup>19</sup>.

## 2. Analysis of the year: the national and Iberoamerican premiere fiction in 2022

**Table 1. Premiere fictions aired in 2022  
(national and foreign within the Obitel scope)**

<p><b>PREMIERE NATIONAL TITLES - 19</b></p> <p><b>Globo (13 titles)</b></p> <ol style="list-style-type: none"> <li>1. <i>Além da Ilusão</i> (telenovela)</li> <li>2. <i>Cara e Coragem</i> (telenovela)</li> <li>3. <i>Cine Holliúdy (series) season 2</i></li> <li>4. <i>Família Paraíso</i> (series)</li> <li>5. <i>Filhas de Eva</i> (series) season 1 (VoD)</li> <li>6. <i>Ilha de Ferro</i> (series) season 2 (VoD)</li> <li>7. <i>Mar do Sertão</i> (telenovela)</li> <li>8. <i>Nos Tempos do Imperador</i> (telenovela)</li> <li>9. <i>Pantanal</i> (telenovela)</li> <li>10. <i>Quanto Mais Vida, Melhor!</i> (telenovela)</li> <li>11. <i>Travessia</i> (telenovela)</li> <li>12. <i>Um Lugar ao Sol</i> (telenovela)</li> <li>13. <i>Verdades Secretas II</i> (telenovela) (VoD)</li> </ol> <p><b>Record (3 titles)</b></p> <ol style="list-style-type: none"> <li>14. <i>Reis</i> (series)</li> <li>15. <i>Todas as Garotas em Mim</i> (series) season 1</li> <li>16. <i>Todas as Garotas em Mim</i> (series) season 2</li> </ol> <p><b>SBT (1 title)</b></p> <ol style="list-style-type: none"> <li>17. <i>Poliana Moça</i> (telenovela)</li> </ol> <p><b>TV Cultura (1 title)</b></p> <ol style="list-style-type: none"> <li>18. <i>Independências</i> (miniseries)</li> </ol> <p><b>TV Brasil (1 title)</b></p> <ol style="list-style-type: none"> <li>19. <i>Brasil Imperial</i> (series)</li> </ol>	<p><b>PREMIERE FOREIGN TITLES - 8</b></p> <p><b>SBT (8 titles)</b></p> <ol style="list-style-type: none"> <li>1. <i>A Desalmada</i> (telenovela, Mexico)</li> <li>2. <i>Decisões do Dia</i> (series, US Hispanic Production)</li> <li>3. <i>Paixões de Gavilanes</i> (telenovela, Mexico)</li> <li>4. <i>Se Nos Deixam</i> (telenovela, Mexico)</li> <li>5. <i>Te Dou a Vida</i> (telenovela, Mexico)</li> <li>6. <i>Vencer o Desamor</i> (telenovela, Mexico)</li> </ol> <p><b>Band</b></p> <ol style="list-style-type: none"> <li>7. <i>Nazaré</i> (telenovela, Portugal)</li> <li>8. <i>Valor da Vida</i> (telenovela, Portugal)</li> </ol> <p style="text-align: center;"><b>TOTAL PREMIERE TITLES: 27</b></p>
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Source: Obitel

<sup>19</sup> Cf. "Streaming 2022", <https://www.infranewstelecom.com.br/sete-em-cada-dez-brasileiros-assinam-plataformas-de-streaming>

**TABLE 1a. Reruns aired in 2022  
(national and foreign within the Obitel scope)**

<b>NATIONAL RERUN TITLES - 21</b>	<b>FOREIGN RERUN TITLES - 4</b>
<b>Globo (6 titles)</b>	<b>SBT (4 titles)</b>
1. <i>A Favorita</i> (telenovela)	1. <i>A Dona</i> (telenovela, Mexico)
2. <i>Chocolate com Pimenta – Special Edition</i> (telenovela)	2. <i>Amanhã é para Sempre</i> (telenovela, Mexico)
3. <i>Malhação - Sonhos</i> (soap opera)	3. <i>Cuidado com o Anjo</i> (telenovela, Mexico)
4. <i>O Clone</i> (telenovela)	4. <i>Mar de Amor</i> (telenovela, Mexico)
5. <i>O Cravo e a Rosa – Special Edition</i> (telenovela)	
6. <i>O Rei do Gado</i> (telenovela)	
<b>Record (5 titles)</b>	
7. <i>A Bíblia</i> (telenovela)	
8. <i>Amor sem Igual</i> (telenovela)	
9. <i>Chamas da Vida</i> (telenovela)	
10. <i>Jesus</i> (telenovela)	
11. <i>Os Dez Mandamentos</i> (telenovela)	
<b>SBT (7 titles)</b>	
12. <i>Carinha de Anjo</i> (telenovela)	
13. <i>Carrossel</i> (telenovela)	
14. <i>Cristal</i> (telenovela)	
15. <i>Cúmplices de um Resgate</i> (telenovela)	
16. <i>Esmeralda</i> (telenovela)	
17. <i>Maria Esperança</i> (telenovela)	
18. <i>Pequena Travessa</i> (telenovela)	
<b>TV Brasil (3 titles)</b>	
19. <i>A Terra Prometida</i> (telenovela)	<b>TOTAL RERUN TITLES: 25</b>
20. <i>Escrava Isaura</i> (telenovela)	
21. <i>Os Imigrantes</i> (telenovela)	

Source: Obitel

Marked by the continuity of the post-pandemic economic recovery, 2022 saw marked impacts in the production and screenings of serial fictions in Brazil. For the first time since 2019, there was an increase in the number of premiere titles aired on broadcast television, with 27 new titles compared to 25 reruns. A total of 52 aired titles represented an increase of 10.6% compared to 2021, when there was a drop in relation to the previous year, 2020.

The production of national premiere titles also increased by 11.7%, after two years of decline; it went from 17 to 19 titles. This increased production is an immediate reflection of the almost complete return of the recordings. Most of them are telenovelas (11), which indicates the resumption of long narratives production. Even so, there was an increase in telenovela reruns (50%), especially on SBT, due to the creation of a new exhibition schedule for them. TV Globo presented nine new telenovelas against five reruns, representing an 80%-increase in new telenovelas and an 80%-decrease in reruns of this type of format.

As for new titles, all broadcasts increased the number of premieres, except for TV Cultura, which maintained the same number of new titles (1). In 2022, Brazil celebrated **200 years of independence** which inspired works on public channels: miniseries *Independências*, on TV Cultura, and series *Brasil Imperial*, on TV Brasil. Public television increased the number of fictions on air, going from just one in 2021 to five in 2022.

It must be pointed out that TV Globo created a new schedule to air telenovela reruns, in addition to traditional show *Vale a Pena Ver de Novo*, in the afternoon. This schedule slot has always been the reason for audience disputes, and previous attempts of TV Globo had not improved its ratings. Only now, with one more telenovela schedule slot, it was possible to achieve such stability in the afternoon. TV Globo also made a new after-midnight schedule of a telenovela on the same day it was aired. This unprecedented action was taken in order to attract young audiences, used to being on social media at this time. The first telenovela to be re-aired was *Cara e Coragem*, from the 7-PM schedule, for which light and present-time narratives are usually produced.

The next three tables show how **production capacity** of the Brazilian television fiction was vigorously resumed in 2022.

**Table 2. Formats of national fiction premiere in 2022  
and their evolution in a five-year period**

Format	Titles						Hours					
	2018	2019	2020	2021	2022	Total	2018	2019	2020	2021	2022	Total
<b>Telenovelas</b>	15	15	6	7	11	<b>54</b>	1193:25	1075:00	339:35	366:40	1187:25	<b>4162:05</b>
<b>Series</b>	18	18	9	9	7	<b>61</b>	102:50	85:00	34:10	50:45	97:30	<b>370:15</b>
<b>Miniseries</b>	4	5	1	1	1	<b>12</b>	12:55	20:25	7:45	1:05	12:00	<b>54:10</b>
<b>Sitcom</b>	0	0	0	0	0	<b>0</b>	0:00	0:45	1:40	0:00	0:00	<b>2:25</b>
<b>Single-Episode</b>	1	0	0	0	0	<b>1</b>	2:25	0:00	0:00	0:00	0:00	<b>2:25</b>
<b>Docudrama</b>	0	6	5	0	0	<b>11</b>	0:00	0:00	0:00	0:00	0:00	<b>0:00</b>
<b>Others</b>	5	6	5	0	0	<b>16</b>	119:40	118:15	32:55	0:00	0:00	<b>270:50</b>
<b>Total</b>	<b>43</b>	<b>50</b>	<b>26</b>	<b>17</b>	<b>19</b>	<b>155</b>	<b>1431:15</b>	<b>1299:25</b>	<b>416:05</b>	<b>418:30</b>	<b>1296:55</b>	<b>4862:10</b>

Source: Kantar Ibope Media - Obitel Brazil

Table 2 shows the evolutionary dynamics of brand new national productions, over the last five years, through the number of titles and hours.

The COVID-19 pandemic led to a sudden change in the years 2020 and 2021. Before the pandemic, the Brazilian productivity average was of 45.3 titles/year. We are still far from this score, but in 2022 there was an increase in brand new content production. This shows the country's ability to regain its fiction productive power and its chances of growth in the coming years. The increase in the number of hours produced explains this hopeful path. We are again approaching the pre-pandemic average,

which was 1,346 hours/year, producing 1,296 hours/year in 2022, compared to 418 hours/year in 2021, thanks to the large number of brand new national telenovelas (11), amounting to a 210 %-increase.

Regarding format trends, in recent years we have seen the emergence of television series in relation to telenovelas, which have been growing steadily since 2018. However, in 2022, the number of brand new telenovelas titles was higher than that of series, which had not happened since 2017. In the last yearbook, we highlighted a serialization that has been transforming Brazilian television fiction, as well as how far would the Brazilian taste for short narratives, considering the telenovela culture found in the country. Considering the 57%-increase in the number of new telenovelas and the 22% decrease in new series, is it time to rethink this? Is this transformation still a consequence of post-pandemic, when telenovelas show to be more prepared for a resumption than series? Or, will we return to the trend of the past years before pandemic, when series were in greater number? This issue deserves attention and will continue to be debated among us.

**Table 3. Premiere fictions aired in 2022: Countries of origin**

Countries	Titles	%	Hours	%
<b>NATIONAL (total)</b>	<b>19</b>	<b>70</b>	<b>1296:55</b>	<b>81</b>
<b>OBITEL COUNTRIES (total)</b>	<b>8</b>	<b>30</b>	<b>313:20</b>	<b>19</b>
Argentina	0	0	0:00	0
Brazil	19	70	1296:55	81
Chile	0	0	0:00	0
Colombia	0	0	0:00	0
Ecuador	0	0	0:00	0
Spain	0	0	0:00	0
USA (Hispanic production)	1	4	5:00	0
Mexico	5	19	259:00	16
Peru	0	0	0:00	0
Portugal	2	7	49:20	3
Uruguay	0	0	0:00	0
Venezuela	0	0	0:00	0
<b>CO-PRODUCTIONS (total)</b>	<b>0</b>	<b>0</b>	<b>0:00</b>	<b>0</b>
National Co-productions	0	0	0:00	0
Obitel Countries Co-productions	0	0	0:00	0
<b>TOTAL</b>	<b>27</b>	<b>100</b>	<b>1610:10</b>	<b>100</b>

Source: Kantar Ibope Media – Obitel Brazil

Following the post-pandemic transition scenario, premiere fiction in Brazil grew as a whole, with the number of Ibero-American productions increasing by 33%. Unlike the fall of the previous year, the number of Brazilian productions increased. The Ibero-American premieres kept the mark of 26% of the total number of titles released. The nationality of the imported productions remained similar to that

of previous years. Five of them were Mexican, and two were Portuguese; however, none of them were American, which recorded one premiere in 2022. Co-productions in the Obitel region continue to not happen.

**Table 4. National and Ibero-American fiction formats aired in 2022**

Format	Titles				Hours			
	National	%	Ibero-American	%	National	%	Ibero-American	%
<b>Telenovela</b>	11	57,9	7	87,5	1187:25	91,6	308:10	98,4
<b>Series</b>	7	36,8	1	12,5	97:30	7,5	5:00	1,6
<b>Miniseries</b>	1	5,3	0	0,0	12:00	0,9	0:00	0,0
<b>Telefilm</b>	0	0,0	0	0,0	0:00	0,0	0:00	0,0
<b>Single-Episode</b>	0	0,0	0	0,0	0:00	0,0	0:00	0,0
<b>Docudrama</b>	0	0,0	0	0,0	0:00	0,0	0:00	0,0
<b>Others</b>	0	0,0	0	0,0	0:00	0,0	0:00	0,0
<b>Total</b>	<b>19</b>	<b>100,0</b>	<b>8</b>	<b>100</b>	<b>1.296:55</b>	<b>100,0</b>	<b>313:10</b>	<b>100,0</b>

Source: Kantar Ibope Media – Obitel Brazil

In 2022, the long seriality format makes up the vast majority of unpublished fictions, both Brazilian and Ibero-American, representing 66.6% of the total number of titles. The number of imported telenovelas increased by 40% from 2021 (5) to 2022 (7), a year when there was also an imported series. The diversification in the formats of the productions followed low, as it was in 2021, with an absence of units, docudramas, and telefilms.

**Table 5: The 10 most watched titles in 2022**

	Titles	Channel	Country of Production	Format/Genre	Chapters in 2022	Slot	Rating	Share
1	<i>Pantanal</i>	Globo	Brazil	Telenovela/Drama	167	Prime Time	28,9	48,2
2	<i>Travessia</i>	Globo	Brazil	Telenovela/Drama	72	Prime Time	23,1	40,8
3	<i>Um Lugar Ao Sol</i>	Globo	Brazil	Telenovela/Drama	72	Prime Time	22,0	37,2
4	<i>Quanto Mais Vida, Melhor</i>	Globo	Brazil	Telenovela/ Romantic Comedy	126	Prime Time	21,1	36,9
5	<i>Cara e Coragem</i>	Globo	Brazil	Telenovela/ Romantic Comedy	186	Prime Time	21,0	36,2
6	<i>Mar do Sertão</i>	Globo	Brazil	Telenovela/ Romantic Comedy	113	Prime Time	20,7	38,8
7	<i>Além da Ilusão</i>	Globo	Brazil	Telenovela/Drama	167	Prime Time	20,1	37,5
8	<i>Nos Tempos do Imperador</i>	Globo	Brazil	Telenovela/Drama	29	Prime Time	17,6	34,2
9	<i>Filhas de Eva - 1ª temporada</i>	Globo	Brazil	Serie/Drama	12	Prime Time	17,4	34,6
10	<i>Cine Holliúdy - 2ª temporada</i>	Globo	Brazil	Series/Comedy	11	Prime Time	17,2	35,1
Total of national titles: 10				Foreign original screenplays: 0				
100%				0%				

Source: Kantar Ibope Media– Obitel Brazil

In the list of the ten most watched titles of the year, the consequences of the transition from the pandemic to the post-pandemic becomes explicit: From a year with a majority of rerun titles, we move to a year with a list of only brand-new titles. In 2020, there were six reruns among the top ten, and in 2021 the number grew to seven. In 2022, in addition to all the titles being new, we had another format besides telenovelas in the ranking again. The series *Filhas de Eva* (2022) and *Cine Holliudy* (2022) took the ninth and tenth positions, respectively. For one more year, all of the most viewed productions were produced by TV Globo.

Nevertheless, there was a drop in the ratings compared to the previous year. *Pantanal* (2022) achieved 28.9 audience points, while *Amor de Mãe*, first place in 2021, achieved 30.9 points<sup>20</sup>. From the second place on, the drop was more significant: *Travessia* (2022) achieved only 23.1 points; last year, only from the sixth place on was a number close to this ever registered (a rating of 22). In 2021, the last four positions registered *the lowest ratings* within the historical series of Obitel, with an average of 20.5 points. In 2022, the average of the last four titles in *the top ten* was even lower, 18 points. A hypothesis that could explain this general drop is that the public preferred to resume other leisure options because of most pandemic restrictions were lifted.

All of 2022's top ten shows were aired at prime time. As for genres, 60% of them are dramas and 40% of them are comedies. There was an increase in the latter compared to the previous year.

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<sup>20</sup> Despite the difficulty in reaching pre-pandemic ratings, in 2022 the *Pantanal* telenovela was a ratings phenomenon. The fact that the ratings of 2021's *Amor de Mãe* were higher should be considered atypical because it was divided into two parts: the first one was aired in early 2021, and then it was interrupted due to the pandemic; the second one was aired in 2022.

**Table 6: Audience profile of the 10 most watched titles:  
Genre, socioeconomic level, and age group**

Title		Channel	Genre %		Socioeconomic level %		
			Women	Men	AB	C	DE
1	<i>Pantanal</i>	Globo	60.8	39.2	33.0	48.5	18.5
2	<i>Travessia</i>	Globo	62.7	37.3	31.2	48.7	20.0
3	<i>Um Lugar Ao Sol</i>	Globo	61.8	38.2	33.6	47.9	18.5
4	<i>Quanto Mais Vida, Melhor</i>	Globo	63.2	36.8	29.9	48.4	21.6
5	<i>Cara e Coragem</i>	Globo	63.1	36.9	28.8	48.8	22.4
6	<i>Mar do Sertão</i>	Globo	63.4	36.6	28.5	49.0	22.5
7	<i>Além da Ilusão</i>	Globo	64.6	35.4	30.3	48.4	21.3
8	<i>Nos Tempos do Imperador</i>	Globo	65.0	35.0	30.8	47.9	21.3
9	<i>Filhas de Eva (season 1)</i>	Globo	62.8	37.2	32.3	49.4	18.3
10	<i>Cine Holliudy (season 2)</i>	Globo	60.2	39.8	32.2	47.8	20.0

Title		Age Group					
		4 a 11	12 a 17	18 a 24	25 a 34	35 a 49	50+
1	<i>Pantanal</i>	4,5	3,6	5,5	12,3	24,9	49,3
2	<i>Travessia</i>	4,4	3,6	5,2	12,1	25,1	49,7
3	<i>Um Lugar Ao Sol</i>	4,5	4,0	6,0	12,5	25,2	47,8
4	<i>Quanto Mais Vida, Melhor</i>	5,3	4,3	5,7	12,1	24,6	48,0
5	<i>Cara e Coragem</i>	5,0	3,8	5,4	12,0	24,3	49,7
6	<i>Mar do Sertão</i>	4,4	3,5	5,1	11,0	23,6	52,4
7	<i>Além da Ilusão</i>	4,7	3,7	5,5	11,4	23,1	51,6
8	<i>Nos Tempos do Imperador</i>	5,4	4,1	5,9	11,4	22,9	50,4
9	<i>Filhas de Eva- (season one)</i>	4,3	4,0	6,0	13,0	25,2	47,5
10	<i>Cine Holliúdy – (season two)</i>	4,6	4,2	5,6	12,8	26,2	46,6

Source: Kantar Ibope Media

The female audience was much higher than that of males in 2022. In all of the most watched shows, the female audience was above 60%, while the male audience decreased and did not surpass the 40% mark for any shows, as had been recorded in previous years. Females continue to comprise the highest audience percentages in 6 p.m. and 7 p.m. telenovelas. Among the favorite male audience's fictions are the high prime time shows, such as the 9 p.m. telenovelas and series *Cine Holliudy*, aired after 10 p.m. this year.

Class C remains the largest top-10 audience, with very similar ratings at all times. *Mar do Sertão* and *Filhas de Eva* were the most watched. The DE class maintains its preference for romance and comedy for another year. *Mar do Sertão* and *Cara e Coragem* among the most watched. Among the AB class there was a general drop in the audience, with the title most seen being *Um Lugar ao Sol*, representing 33.6% of the total. This drop among the privileged classes reinforces the hypothesis that many

of those who have purchasing power have opted to watch streaming channels or do other leisure activities outside their homes.

Regarding age groups, the audience over 50 years was, once again, the one that watched fictions the most, especially the 6 PM telenovelas. The three shows in this time range were the ones they watched the most. And, unlike previous years, the 50-year-old or older audience was the largest in all top-10 shows. The audience between 39 and 49 years was among the largest audience of two series.

With the post-pandemic transition, 2022 was a year of true renewal of the productions and new releases of serial fiction in Brazil. Broadcast television remains the public's favorite, surpassing streaming platforms, which is discussed in the next topic. TV Globo maintains its dominant position. It produced the 10 most watched shows of the year. In Brazil, broadcast television keeps its strength in the audiovisual field, especially in fiction.

### 3. VoD Monitoring 2022

In 2022, the advances in consolidating the Video on Demand market (VoD) in Brazil deserve highlight. It gained ground alongside digital literacy, the expansion of 4G technology, the strengthening of new players in the country, and the strong expansion of the Brazilian Globoplay platform. The national market has been watching the streaming competition, the search for new consumers with the adoption of different productive and marketing strategies and consequent competition among the main platforms (Netflix, Prime Video, Globoplay, HBO Max, Star+, Disney+, and Apple TV+).

#### 3.1 VoD platform market in 2022

According to an Ancine report entitled *Overview of the Demand Video Market in Brazil-2022*<sup>21</sup>, among the 20 countries surveyed in Latin America<sup>22</sup>, Brazil has the largest number of Video on Demand services, with 59 available platforms. The high supply is accompanied by better conditions for consumers, since the average prices per monthly subscription of VoD services in Brazil is the lowest among the countries surveyed: about US\$ 5.64 or R\$ 26.36 compared to US\$ 7.23 or R\$ 33.79 in the other countries.

#### 3.2 Offer of national VoD platforms in 2022

The most watched streaming platforms by Brazilians in 2022 are: Netflix (30%), followed by Prime Video (21%), Disney+ (15%), HBO Max (11%), Globoplay (8%)

<sup>21</sup> <http://bitly.ws/FxSS>. Almost all of this data comes from this report.

<sup>22</sup> The countries are: Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Cuba, El Salvador, Ecuador, Guatemala, Honduras, Mexico, Nicaragua, Panama, Paraguay, Peru, Puerto Rico, Dominican Republic, Uruguay and Venezuela.

and STAR+ (6%).<sup>23</sup> By merging Disney's two streaming platforms (Disney+ and STAR+), it reaches the same audience share as Amazon Prime.

In a more competitive scenario and with a decrease in membership, Netflix launched a new "Basic with Ads" subscription plan, with economic advantages but less content, subject to advertising before and after its display. Globoplay also deserves highlight; It continues to expand and conquer the market, with phenomena such as the release of the original Telenovela for VoD, *Todas as Flores*, and the broadcast of *Pantanal*, a telenovela aired on TV Globo. The platform experienced a growth of 27% in its subscriber base, and a growth of over 30% in its revenue.<sup>24</sup>

Regarding the shows it offers, after two years in which the national productions led the releases in streaming, the premiere of Ibero-American titles (73) surpassed the Brazilian ones again (49). This change indicates the consolidation of Ibero-American cultural products in the local scenario, which is mainly associated with the growth and launches of these countries in the portfolios of Netflix, Globoplay and STAR+. The great interest of Globoplay in Portuguese products is also highlighted: While in 2021 no title of this country debuted on this platform, there were 10 Portuguese releases in 2022. Of these, six are telenovelas, popularized through the Brazilian productions exported by TV Globo.

### 3.3 VoD analysis in 2022: national premiere fiction and co-productions

In 2022, the national launches in VoD in Brazil were as follows.

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<sup>23</sup> According to German streaming guide *JustWatch*, based on data collected in the last quarter of 2022. See <https://www.justwatch.com>

<sup>24</sup> <http://bitly.ws/FxTm>

Table 7. National fictions and co-productions aired in Brazil in VoD in 2022

National debut fictions in VoD	Obitel Countries premiere co-productions in VoD
<p><b>Globoplay - 34 fictions</b></p> <ol style="list-style-type: none"> <li>1. <i>A Casa das Sete Mulheres</i> (Miniseries) – Season 1</li> <li>2. <i>Alma Gêmea</i> (telenovela)</li> <li>3. <i>América</i> (telenovela)</li> <li>4. <i>Amor Com Amor Se Paga</i> (telenovela)</li> <li>5. <i>Anjo Mau</i> (telenovela)</li> <li>6. <i>Anos Dourados</i> (Miniseries) – Season 1</li> <li>7. <i>Arcanjo Renegado</i> (Series) Season 2</li> <li>8. <i>Belíssima</i> (telenovela)</li> <li>9. <i>Caminho das Índias</i> (telenovela)</li> <li>10. <i>Celebridade</i> (telenovela)</li> <li>11. <i>Da Cor do Pecado</i> (telenovela)</li> <li>12. <i>Desalma</i> (Series) – Season 2</li> <li>13. <i>Encantado's</i> (Series)-Season1</li> <li>14. <i>Guerra dos Sexos</i> (telenovela)</li> <li>15. <i>Lua Cheia de Amor</i> (telenovela)</li> <li>16. <i>Malhação 1996</i> (Telenovela)</li> <li>17. <i>Malhação 2009</i> (Telenovela)</li> <li>18. <i>O Beijo do Vampiro</i> (telenovela)</li> <li>19. <i>Os Últimos Dias de Gilda</i> (Miniseries) – Season 1.</li> <li>20. <i>Páginas da Vida</i> (telenovela)</li> <li>21. <i>Pão-Pão, Beijo-Beijo</i> (telenovela)</li> <li>22. <i>Paraíso Tropical</i> (telenovela)</li> <li>23. <i>Pecado Capital</i> (Telenovela)</li> <li>24. <i>Pedra sobre Pedra</i> (telenovela)</li> <li>25. <i>Por Amor</i> (telenovela)</li> <li>26. <i>Quatro por Quatro</i> (telenovela)</li> <li>27. <i>Que Rei Sou Eu?</i> (telenovela)</li> <li>28. <i>Rensga Hits!</i> (Series) - Season 1</li> <li>29. <i>Sob Pressão</i>(Series)-Season 5</li> <li>30. <i>Sonho Meu</i> (telenovela)</li> <li>31. <i>Tropicaliente</i> (telenovela)</li> <li>32. <i>Todas as Flores</i> - (telenovela)</li> <li>33. <i>Turma da Mônica</i> - A Série (Series) – Season 1</li> <li>34. <i>Um Anjo Caiu do Céu</i> (Telenovela)</li> </ol>	<p><b>Netflix - 4 fictions</b></p> <ol style="list-style-type: none"> <li>1. <i>Diario de un Gigoló</i> (Series, Argentina and USA) - Season 1</li> <li>2. <i>El Rey, Vicente Fernandez</i> (Series, Mexico and Colombia) - Season 1</li> <li>3. <i>Malverde: El Santo Patron</i> (Series, USA and Mexico) – Season 1</li> <li>4. <i>Guillermo Del Toro's Cabinet of Curiosities</i> (Series, USA and Mexico) - Season 1</li> </ol> <p><b>STAR+- 1 fiction</b></p> <ol style="list-style-type: none"> <li>1. <i>Lynch</i> (Series, Colombia, Mexico and Argentina) - Season 2</li> </ol> <p><b>Prime Video - 1 fiction</b></p> <ol style="list-style-type: none"> <li>1. <i>Operación Marea Negra</i> (Series, Spain, Portugal and Brazil) - Season 1</li> </ol>

<p><b>Netflix - 8 fictions</b></p> <ol style="list-style-type: none"> <li>1. <i>A Sogra Que Te Pariu</i> (Series) - Season 1</li> <li>2. <i>Bom Dia, Verônica</i> (Series) - Season 2</li> <li>3. <i>De Volta aos 15</i> (Series) Season 1</li> <li>4. <i>Maldivas</i> (Series) – Season 1</li> <li>5. <i>Nada Suspeitos</i> (Series) - Season 1</li> <li>6. <i>Sintonia</i> (Series) - Season 3</li> <li>7. <i>Só se For por Amor</i> (Series) - Season 1</li> <li>8. <i>Temporada de Verão</i> (Series) - Season 1</li> </ol> <p><b>HBO Max – 2 fictions</b></p> <ol style="list-style-type: none"> <li>1. <i>No Mundo da Luna</i> (Series) - Season 1</li> <li>2. <i>Pico da Neblina</i> (Series) - Season 2</li> </ol> <p><b>STAR+ - 2 fictions</b></p> <ol style="list-style-type: none"> <li>1. <i>Não foi Minha Culpa: Brazil</i> (Series) - Season 1</li> <li>2. <i>O Rei da TV</i> (Series)- Season 1</li> </ol> <p><b>Disney+ - 1 fiction</b></p> <ol style="list-style-type: none"> <li>1. <i>Tudo Igual... SQN</i> (series) - Season 1</li> </ol> <p><b>Paramount+ - 1 fiction</b></p> <ol style="list-style-type: none"> <li>1. <i>As Seguidoras</i> (Series) - Season 1</li> </ol> <p><b>Prime Video - 1fiction</b></p> <ol style="list-style-type: none"> <li>1. <i>Lov3</i> (Series) - Season 1</li> </ol>	
<b>Total: 49 fictions</b>	<b>Total: 6 fictions</b>
<b>Final Total: 55 fictions</b>	

Source: Obitel Brazil

Globoplay remained the leader of national releases, with 34 shows, followed by Netflix (8), HBO Max (2), STAR+ (2), Disney+ (1), Paramount+ (1), and Prime Video (1). Its catalog features new telenovelas, as *Todas as Flores* and “classic” ones, from decades ago, indicating the strength of the genre. It is worth noting how heavily the platform has invested in different strategies to reach new audiences and retain old ones. In the case of *Todas as Flores*, for example, a five-chapter block release every Wednesday was adopted. This model is similar to the fifth season of *Sob Pressão*, with weekly two-chapter blocks. This strategy enabled the platform to promote a

marathon experience (typical of streaming platforms). It also made it possible for this show to be watched for a long period (a standard that alludes to how telenovelas are aired on broadcast TV), as well as to retain old subscriptions.

Regarding the other platforms, attention is drawn to the annual growth of Brazilian premieres on Netflix, from two titles to eight, in addition to a sharp drop in national releases on Prime Video, which ranged from 12 to a debut. Many of the released shows feature former TV Globo actors. Due to structural changes, they are no longer TV Globo exclusive actors. They started working per project at TV Globo, or were hired by foreign streaming platforms<sup>25</sup>, which profit from their visibility and expand their audiences.

Regarding the productions from the Obitel countries, the number of co-productions jumped from one to six, suggesting a promising trend of economic and cultural exchanges among themselves. This year one of the titles co-produced is from Brazil: The first season of series *Operación Marea Negra*, in co-production with Spain and Portugal. All co-productions are series, with five in their first season, in a bet on the growth of Ibero-American productions.

### 3.4 Narrative characteristics of VoD in 2022

As it happens on broadcast channels, *Todas as Flores* ended each chapter at the climax, arousing the interest of the audience for the next episode and stimulating the habit of binge-watch five chapters. In addition, the fifth and final chapter of each block ended with an even more dramatic hook in order to draw the viewer to the following week. This distribution strategy also increased time spent on platforms, one of the metrics for marketing advertising spaces in VoDs.

Considered the first telenovela produced strictly for Globoplay, *Todas as Flores* was a success among the public and critics. It brought changes in seriality: it had 85 chapters (of average one hour each), half of what is the usual in a telenovela, approaching the serial format, and a narration in short dramatic arches closed a *plot* practically in the same chapter. The fusion of genres (drama, comedy, suspense, crime, eroticism) allied with themes such as classism, business disputes, human trafficking, popular fashion/luxury.

The affirmation of identity, representativeness and diversity was one of the outstanding characteristic of this show, which dealt with capacitism and presented blind protagonist Maira (Sophie Charlotte), as well as several other people with visual impairment, as excellent collaborators of an industry.

Another national fiction highlight produced for VoD was series *Encantado's* (Globoplay, 2022). Written by graduates of a Script Workshop for Black Authors of TV Globo, this series takes place in a market that, at night, becomes a samba

<sup>25</sup> These changes in the market of actors due to dismissals from Globo and its new business model are discussed in the 2022 Obitel Yearbook.

school called “Joia do Encantado”, where the dramas experienced by their characters are presented. Starred by blacks, *Encantado*’s talks about their traditions, faith, sociability and everyday life, while giving visibility to their dramas, affections and dreams. In a country marked by diversity, the series is an opportunity for millions of Brazilians to recognize themselves in telefiction and create new imaginaries about themselves, about the other and about Brazil itself, a nation not as white as it is usually represented.

#### 4. Interactivity and participation of audiences

On digital platforms, 2022 was characterized by an active participation of audiences. The biggest phenomenon of interactivity was telenovela *Pantanal*; for this reason, we define it as a *media event*<sup>26</sup>. Since its beginning, it made families gather in front of TV sets. It was the topic of conversation in variety shows and informal conversations; it was also one of the most commented topics on social media and stimulated Brazilians’ creative talent through numerous memes. Characters such as “José Leôncio” (Renato Goés/Marcos Palmeira), “Zaqueu” (Silvero Pereira) and “Maria Bruaca” (Isabel Teixeira) became close to audiences by amusing and moving them.

In addition to narrative quality and production, *Pantanal*’s success in social networks was the result of a strategic communication planning of Grupo Globo to engage audiences. Jenkins (2008) names this a “social interactivity promoted by industry.” A year and a half prior to the telenovela premiere, variety/journalism show *Fantástico* had announced that this telenovela would undergo a remake. It was a TV drama classic produced by extinct TV Manchete in 1990. From that date on, old and new fans mobilized and created the first speculations.

The launch campaign yielded good results. In the broadcast TV schedule, journalistic and entertainment content promoted engagement. Having been a success of audience and profitability, its interactivity rates were also high. According to data from Twitter, between the first and last chapter, more than 3 million tweets were posted<sup>27</sup>, a fact verified in the recurrence of mentions in *trending topics*. The protagonist character “Juma” was the most cited and *the hashtag* #Juve, symbolizing the shipping of the couple “Juma and Jove”, was remarkable.

As to the “social participation promoted by audiences” (JENKINS, 2008), a highlight was the production of content by TikTokers who engaged, created fan communities, and popularized such productions using a mostly comical tone. Characters from *Pantanal* and *All Flowers* were reinterpreted by their content creators, resulting in memes that were often replicated on Twitter, Instagram and Facebook. The so-called *react videos*, where in which users react to a scene, were also recurrent in the

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<sup>26</sup> For Mulgan (1990), a *media event* is a media phenomenon linked to a certain time and context, whose repercussion is responsible for generating social commotion and unfolding in multiple languages, in the most diverse sectors of society.

<sup>27</sup> [bit.ly/3MvtC5L](https://bit.ly/3MvtC5L)

novel approach. TikTok offered a creative innovation of audience participation – a filter of character “Chiara” (Jade Picon), of telenovela *Travessia*<sup>28</sup>. It enabled users to reproduce this character’s facial features.

In WhatsApp, *Pantanal* gained prominence through stickers, image-format content that can be saved and shared. In addition to facial expressions used to mention sensations, images with jargon were intensely shared, such as the “Pantanês” vocabulary<sup>29</sup>: “ara”, “reiva”, “diacho” and “rupiei”.

However, the content produced on these platforms was not only comedic. The discussions stirred by *Pantanal*, *Travessia*, and *Todas as Flores*, such as identity and human rights guidelines, were discussed on social media. This deepened the conversation, adding new layers of meanings to it, and pointing out that fiction found a match in real life. In this context, a highlight may be character “Maria Bruaca”, a woman harassed by her husband. Throughout the plot, she frees herself from submission to a sexist relationship and, in doing so, inspired internet users from all over the country and had viewers make posts reporting similar experiences.

## 5. Highlights of the year 2022

The recovery of the stability in shoots promoted an increase in TV fiction releases in both broadcast TV and streaming platforms. Among them, the most prominent of the year were three works: The *Pantanal* remake, telenovela *Travessia*, written by consecrated author Gloria Perez, and *Todas as Flores*, by João Emmanuel Carneiro, Globo’s bet for its streaming platform.

### 5.1. The great success of the remake of *Pantanal*

After 32 years of airing on TV Manchete in 1990, *Pantanal* got a remake and was produced and aired by TV Globo (28/03 to 07/10/2022) at 9 p.m. The original novel, written by Benedito Ruy Barbosa, had 216 chapters, and the remake written by his grandson, Bruno Luperi, 167, that is, 23% fewer chapters.

TV Globo made use of different approaches for promotion and public engagement. Until its debut, the largest 9 p.m. telenovela campaign ever was devised by the broadcaster. It was comprised of 37 different promotional pieces and more than 260 insertions in the programming. The first chapter was presented at the *Big Brother Brasil* reality show house using 8K-image technology and immersive sound. In addition, this telenovela promotion was present in all TV Globo programming, including the online environment, with the creation of exclusive content.

The plot portrays a family saga, having love as a guiding thread and nature as a protagonist. The story is centered in old Joventino and his son, José Leôncio. Life as

<sup>28</sup> *Travessia* was the TV Globo prime time telenovela that preceded *the Pantanal*, with very low ratings for the schedule and much criticized by the audience on social media.

<sup>29</sup> Satire to the mode of talking about the characters of *Pantanal*. See [bit.ly/3qcqpAB](https://bit.ly/3qcqpAB)

an entourage pawn takes them to the Pantanal region, where the father learns that nature can do more than man.

In the first phase, after Joventino's mysterious disappearance, José Leôncio falls in love with Madeleine, marries her, and Jove is born from this love. Missing the urban life and its comforts, Madeleine flees from the Pantanal carrying her baby. The boy grows up far from his father, who found himself unable to fight for custody of his son.

The second phase of this telenovela begins 20 years later, when Jove goes after José Leôncio after he discovers that his father is alive. Despite the joy of their reunion, father and son are confronted by behavioral and cultural differences. In addition to this troubled relationship, the novel presents remarkable characters and stories, which represent the people, Brazilian culture and mysticism, such as Juma Marruá, wild woman who turns into jaguar, the Velho do Rio ("The River Elder"), a healer and defender of nature who becomes a sucuri snake, and Trindade, a guitar player who has pact with the "cramulhão" (humorous popular name for the devil).

The *Pantanal* remake touched on several meanings of citizenship (CANCLINI, 1995) and added either embryonic or non-existent conversations to its original version. This remake presented updates in social achievements of the last 30 years, and addressed challenges that were intensified during this time. It also discussed issues on the public sphere agenda, such as gender, sexuality, environmental preservation, and the agribusiness.

*Pantanal* was a media phenomenon, a *media event*, that is, an event linked to a time, which touches on important issues of a given moment. The update in the way certain debates were presented and the addition of new themes were fundamental to its success, both among the public that already knew it and among a new generation of viewers. In turn, this reaffirms our theses on telenovela as a *narrative of the nation* (LOPES, 2003) and as a *communicative resource* (LOPES, 2009)<sup>30</sup>.

## 5.2. Broadcast TV, streaming, and telenovelas: *Travessia* and *Todas as Flores*

As we said, after *Pantanal*, Globo invested in two productions: one focused on broadcast TV, authored by Gloria Perez, and another for its streaming platform, Globoplay, written by João Emanuel Carneiro.

### 5.2.1. The failure of *Travessia*, at TV Globo's prime time

João Emanuel Carneiro was the author expected to succeed *Pantanal* on open TV but was replaced by Gloria Perez. We raised some possibilities for this movement. The first one is Perez's success with the public. Gloria Perez is known for being able

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<sup>30</sup> These two concepts cannot be forgotten. We have been using them in our studies at CETVN, Obitel and Obitel Brazil over time. Within the latter, we were contemplated, through the "Network Projects - Public Policies for Human and Social Development - Pro Humanities" of CNPq, with the project "Brazilian Television Fiction as a resource for promoting citizenship".

to establish a dialogue with the audience and make changes to the text, keeping the telenovela as an “open work.” Another Perez’s characteristic is her way of addressing problems of both the upper class and the lower middle class. She presents popular characters who usually say catchphrases that conquer Brazil. Her last success, *A Força do Querer* (Globo, 2017), featured themes such as gender transition and obesity. It stirred several discussions in the mainstream media and drew sponsors and a high audience (ABRÃO, 2021).

If Perez is considered an author who works with everyday and controversial themes, João Emanuel Carneiro is known for suspense stories that are full of twists, such as *A Favorita* (Globo, 2008) and *Avenida Brasil* (Globo, 2012). Thus, choosing Perez for broadcast TV suggests a shift of focus on the most popular layers, while Carneiro’s presence in streaming media is directed to a smaller, select audience, who has been following the trend of binge-watching television series.

Replacing a plot of immense success is a great challenge because it demands a story that gets viewers hooked right in the first chapters; otherwise, ratings will quickly drop. Gloria Perez tried some strategies to obtain the immediate approval of those who had been watching *Pantanal*, such as: 1) the return of some characters of *Salve Jorge* (Globo, 2015); 2) the deep fake controversy, responsible for the separation of the 3) Brisa couple (Lucy Alves) and Ari (Chay Suede), as well as 4) Chiara (Jade Picon), who would form the love triangle of the plot. The choice of Jade Picon, a digital influencer who participated in *Big Brother Brasil 2022*, was a bet to engage younger audiences.

However, in the first chapter, the telenovela suffered criticism for the absence of chemistry among the protagonists, for the poor performance of the influencer and, especially, for the excess of violence in the scenes starring Guerra (Humberto Martins), Débora (Grazi Massafera) and Moretti (Rodrigo Lombardi). The attempt of femicide in the first chapter, with the presence of a firearm, coincided with the 2022 election runoff, disputed between Lula and Bolsonaro – the latter, a defender of the population’s right to have guns and responsible for arm release decrees. In 2022, there was a 5.5% increase in the rate of femicide in Brazil. If the runoff signaled possible problems with the audience given the mandatory placement of the electoral time, the non-prediction that certain discourses inserted in the plot would nurture polarized political discussions. Thus, the elections directly affected *Travessia*: from the context to the text, this telenovela seemed to highlight the author’s political position in favor of Bolsonaro<sup>31</sup>. In addition, there were major controversies in the media between the author and one of the telenovela actresses<sup>32</sup>.

The theme of *deep fake* disappeared throughout the plot and presented a growing difficulty in attracting the public. The telenovela eventually reached the second

<sup>31</sup> <https://www1.folha.uol.com.br/ilustrada/2022/10/entenda-polemica-de-gloria-perez-e-bolsonaro-que-e-idolo-de-guilherme-de-padua.shtml>

<sup>32</sup> <https://rd1.com.br/gloria-perez-toma-atitude-com-cassia-kis-apos-polemicas-em-travessia/>

lowest audience rating of a 9 p.m. telenovela and it saw a reduction in its number of chapters. The socio-educational themes, a Perez's trademark were forsaken at the beginning of *Travessia* but were included at its end as an attempt to save the story: youngsters' dependence of videogames, pedophilia, capacitism, were some of the issues featured in the narrative.

At the same time, in Globoplay, *Todas as Flores*, conquered the spotlight and attention of different audiences.

### 5.2.2. *Todas as Flores*, a huge streaming success

*Todas as Flores* debuted on October 19th, 2022, with the strategy of launching five-episode blocks every week. This telenovela was divided into two parts: the first one had 45 chapters, which were aired in 2022, while the second one had another 40 chapters, which were released in 2023, totalizing 85 chapters. The work would have had 150 chapters if it had been aired on broadcast TV<sup>33</sup>, but its shorter duration on *streaming* gave it a series feature, division into two seasons, an agile narrative and narrative arches coinciding with intense hooks, just like series episodes.

This experiment of new serialization on a telenovela proved successful, and *Todas as Flores* broke rating records on Globoplay. Since its debut, the work of João Emanuel Carneiro has reached the first place on the list of “The Ten Most Viewed”. Its contents were also an important part of this success, presenting a central protagonist with visual disability for the first time, charismatic villains, and many twists typical of the author's writing style (see topic 3.4).

The unprecedented fact that Globo aired two prime-time telenovelas simultaneously caught the attention of the media and social media, who questioned why that the “better” telenovela (*Todas as Flores*) was available precisely on the paid platform. Due to its huge success, it will be aired on broadcast TV in 2023.

## 6. Theme of the Year: Independent producers and the internationalization of television fiction production in Ibero- America

In this Theme of the Year, we start from framing independent audiovisual within *creative economy*, which produces cultural goods and services that carry cultural and economic values. Culture must be regarded as a strategic element of development policies. The creative economy is associated with economic growth and innovation and, consequently, the development of emerging countries. This may trigger a virtuous circle between economy, culture, science, and technology. We may say culture is *operationalized* by creative industries<sup>34</sup>. It results from broader social

<sup>33</sup> <https://bit.ly/3IBSUOw>

<sup>34</sup> Firjan (2022) has periodically carried out a mapping of the creative industry in Brazil, splitting it into four major creative areas and 13 creative segments, namely: 1) Consumption: Design, Architecture, Fashion, Advertising & Marketing; 2) Media: Editorial and Audiovisual; 3) Culture: Heritage

transformations such as economic globalization and global culture. It expresses an interrelationship between creative process and market demand, with emphasis on the importance of intellectual capital - technology is very relevant, but in the audiovisual sector it only exists in the relationship with the creative process of writing and direction.

This concept helps us present an overview of the TV fiction production made by independent Brazilian producers<sup>35</sup>, especially in the post-pandemic Covid-19 context.

In the last 15 years, the decentralization of public promotion notices; the Pay TV law (12.485/11); and the entry of new players into the market (VoD platforms) have greatly boosted the growth of independent audiovisual in the country. It gained a prominent position within the new media ecology. This law caused a real explosion in the Brazilian audiovisual sector from 2012 onwards.

This sector generates about R\$ 25 billion (5 billion USD) for the Brazilian GDP and indirectly impacts the economy by generating jobs and taxes. In the end, it may generate nearly R\$ 55 billion (11 billion USD)<sup>36</sup> for GDP – there are 657 thousand direct jobs, indirect and induced, or 126.6 thousand considering direct generation alone.

In 2018, 69% of Brazilian fiction on Broadcast TV, Pay TV and VoD were from independent producers. On the other hand, new challenges arose with the pandemic, the dismantle of the Ministry of Culture, the consequent extinction of public notices, the attempts to change the law of Pay TV, and, more recently, the struggles for regulating streaming platforms in the country.

In 2022, there were 9,113 independent production companies registered in Ancine. This amounts to a 14.13%-decrease compared to 2021, when there were 9,503 independent production companies. However, these numbers are distributed in a deeply unequal way across regions - Southeast: 66.5%; South: 12.4%; Northeast: 11.9%; Center-West: 6.2%; North: 3.0%<sup>37</sup>. The Southeast region has twice as many producers as the sum of all the other four regions.

As mentioned above, in the last five years, the Brazilian audiovisual sector was deeply affected by government dismantling practices and the COVID-19 pandemic (LOPES; SANTOS, 2021; LOPES; ABRÃO, 2022). Without public notices from the FSA (Audiovisual Sector Fund), independent producers had to reinvent themselves to remain in the market while many of them were forced to end their activities.

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and the Arts, Music, Performing Arts and Cultural Expressions; 4) Technology: R&D, Biotechnology and ICT.

<sup>35</sup> Summarizing the Ancine definition, independent producers are companies owning all or most of the property rights on a work and have no direct or indirect link with other companies that transmit sound or image, whether they are broadcast or pay TV.

<sup>36</sup> Survey carried out by the Motion Pictures Association (MPA). See <https://bit.ly/438Ckhe>

<sup>37</sup> Ancine (2022)

In 2022, the brand new series broadcast by TV Globo are original Globoplay productions. On the other hand, the TV channel produced eight telenovelas this year. The Globo Group's strategy seemed increasingly adjusted to the set of platforms it has - broadcast TV, Pay TV, and VoD. It can co-produce series for its streaming platform alongside independent producers, and later release them on broadcast TV – as it was the case of *Sob Pressão* (in season 5 when this report was written), in co-production with *Conspiração Filmes*. On the other hand, TV Globo focuses on the production of telenovelas, made available in synchronous mode on Globoplay, such as *Pantanal* and *Travessia*. TV Record produced two new series and three telenovelas, all of them conceived by Casablanca Studios, an independent producer and partner. SBT produced only one telenovela in 2022, *Poliana Moça*, made available on Prime Video, with which it signed the licensing and co-production of telenovelas.

The large independent Brazilian producers are responsible for most streaming platform productions. Among them, O2, *Conspiração*, Glaz, and Moonshot deserve highlight. However, the largest volume of fictions comes from smaller companies, such as Primo Filmes and Raccord. This suggests that the platform market seeks diverse products – these have dealt with internal restructuring, layoffs and cuts since the suspension of the FSA in 2019 by the Bolsonaro government.

When funded by the FSA, the intellectual production of series remains with independent producers after it is aired on licensed channels. This allows them to sell them to other services, hence the importance of public funding.

Some producers specialize in pre- or post-production, while others participate in all stages. In many cases, a project is co-produced, whether with a TV channel, a platform, or among the producers themselves<sup>38</sup>. This scenario is facilitated by the expansion of streaming platforms, which strengthened the audiovisual and created a global economic scale, enabling co-productions in several countries, as well as national product exports.

However, the internationalization of Brazilian audiovisual content is not recent. TV Globo was one of the pioneers in exporting telenovelas in the 1970s after the national market was consolidated (TONDATO, 1998). During the 1990s, it experienced a period of numerous exports that coincided with the inauguration in 1995 of the Projac (nowadays named Globo Studios). In the late 2000s, the presence of Portuguese actors in Brazilian telenovelas also began a way of establishing a dialogue

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<sup>38</sup> Throughout this topic, we used data and findings from an ongoing research project entitled *Economia criativa do audiovisual brasileiro independente: o papel da criatividade e o impacto da inovação no cenário produtivo das séries televisivas nacionais: avaliação e propostas* (Creative economy of independent Brazilian audiovisual: The role of creativity and the impact of innovation on the production scenario of national television series: assessment and proposals). It presents a comparison between large, medium, and small independent producers in the regions of São Paulo-Rio de Janeiro and Northeast Brazil in the sense to understand the current operating conditions of these producers. The collected data were split into eight *macro-categories*: (1) History, Management and Business, (2) Financing, (3) Bolsonaro Government, (4) Pandemic, (5) Production and consumption, (6) Creativity, (7) Pandemic, (8) Regulation.

with Portugal, a great consumer of TV Globo products. From 2010 onwards, there has been a reverse flow: Brazilian actors move to Portugal to work for TVI and SIC, now major producers of this format.

With the arrival of *streaming* in Brazil, television fiction has become a highly demanded product. The companies that stand out most are those that have a larger, more diverse catalog and are constantly launching new content. In this “war of platforms” aggravated by the high volume of old and new subscribers, the independent producers are the most benefited companies, because they can license their products to different platforms and enter into co-production partnerships. The return of public funding in 2022 made headway for new and better prospects for Brazilian TV fiction production.

VoD platforms have led to the restructuring of business models, such as the exclusive hiring of artists by Globo, which has been closing long contracts to give space to contracts per work. In this way, several “global artists” were hired by platforms such as Netflix, HBO Max, among others. On the other hand, it has been announced that these streaming platforms are preparing to produce telenovelas with local teams and distribute them globally. New competition fronts have been emerging.

Finally, it seems that the telenovela remains the “narrative of the nation” (LOPES, 2009), but it has entered into a new scenario, that of the *streaming culture* (ARDITI, 2021). This has been changing the global audiovisual market, as well as the ways of watching and producing television fiction. Obitel is faced with the challenge of continuing to describing and discussing new objects and content, production and distribution strategies, as well as new habits and experiences of watching television. This occurs amidst an incessant growth in producing of new knowledge about Ibero-American television fiction.

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