

# NETFLIX AND THE BRAZILIAN AUDIO-VISUAL MARKET

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## AN OVERVIEW



# RESEARCH TEAM AND METHOD

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- **Research Team:** Leonardo De Marchi (Rio de Janeiro State University) and João Martins Ladeira (Federal University of Parana).
- **Method and research techniques:**
  - Exploratory case study.
  - Semi-structured interviews with individuals.
  - Mapping of the Netflix Originals Brazil titles.
  - Bibliographic research (papers, Master and PhD thesis on the subject Netflix)

# THE BRAZILIAN DIGITAL AUDIO-VISUAL MARKET: HISTORICAL PERSPECTIVE

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- Historically, television plays a decisive political role, with the cartel-shaped market.
- It is only with pay TV (from 1990 onwards) that the local television market opens to international players – though limitedly.
- From the late 1990's to the 2010's, the idea of the key players was to reproduce the pay TV competition structure (that is, a controlled competition between dominant local players and foreign corporations) into the audio-visual digital market.



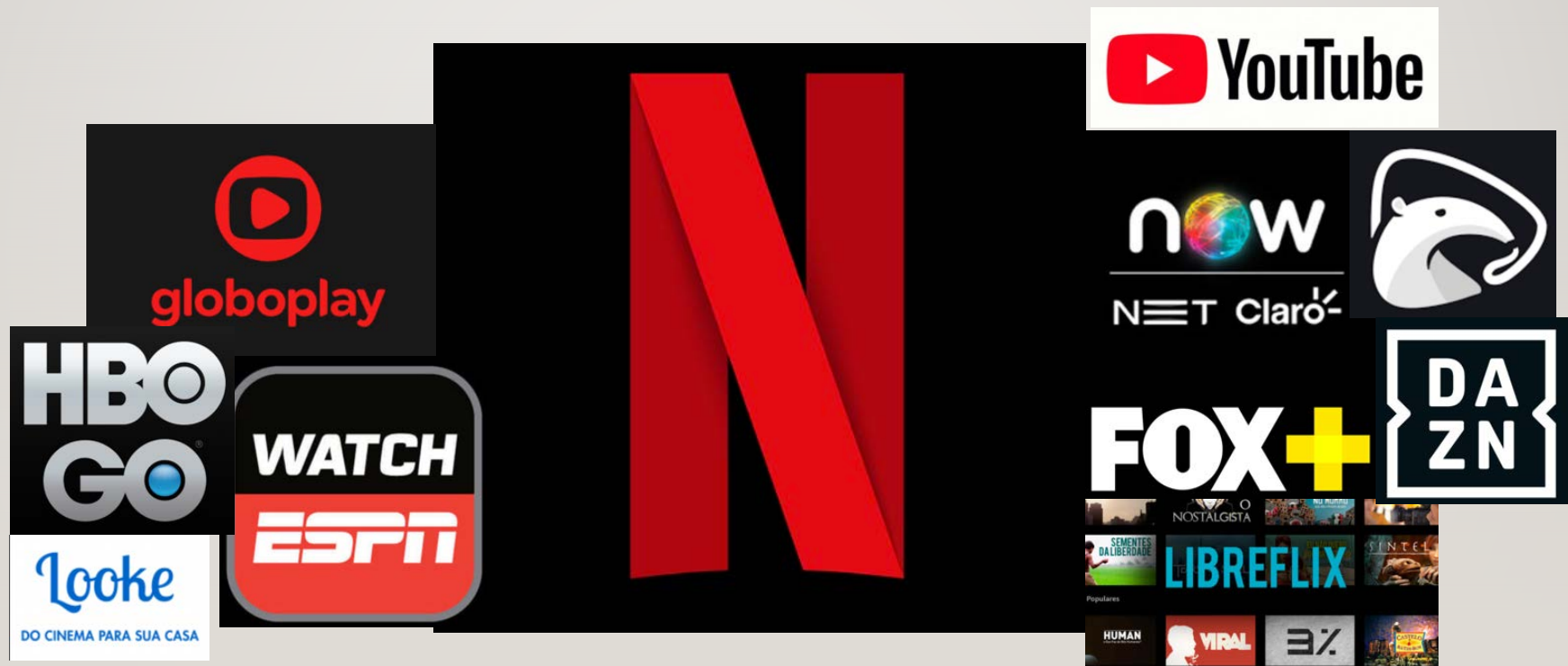
## 2011: THE TIPPING POINT

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- Claro and Globo Corp. launch their VoD platforms:
  - NET Now
  - Muu (rebranded GloboPlay in 2015).
- Netflix enters the Brazilian Market.

# THE DIGITAL MARKET IN BRAZIL: PLAYERS AND NICHES

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# THE DIGITAL MARKET IN BRAZIL: PLAYERS AND NICHEs

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- Brazil has developed quickly all niches for ofVoD services.
- International brands compete with local services without any regulation so far.
- Despite the lack of reliable information, it seems that YouTube and Netflix controls their niche markets.
- Sport platforms are gaining market quickly.
- Pay TV channels are offering OTT services, though it isn't clear yet if they can do it by law: Fox+ law case.



# NETFLIX ORIGINALS BRAZIL



# NETFLIX ORIGINALS BRAZIL: FORMATS AND GENRES

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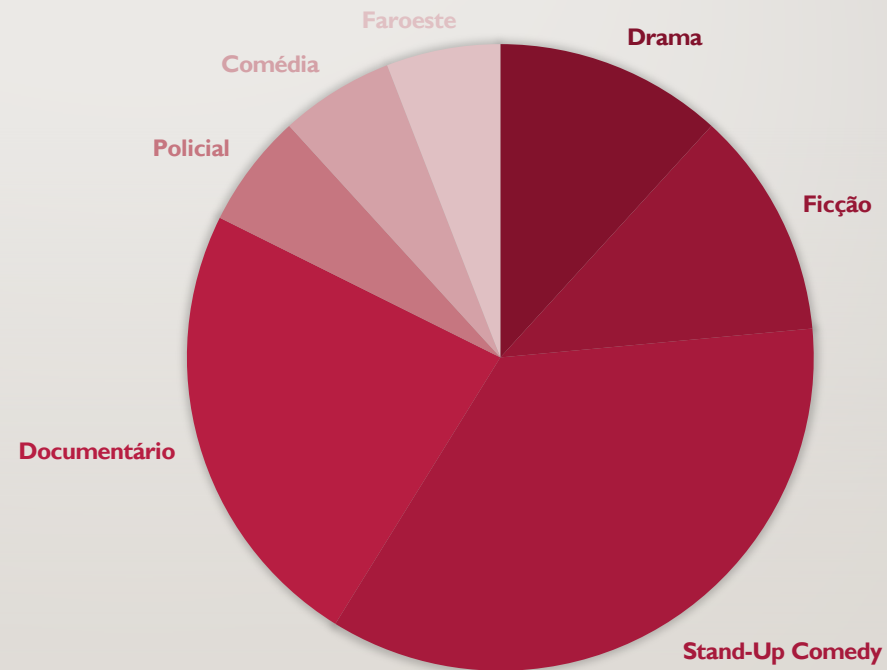
- **Total number of titles:** 17.
- **Series:** 8.
- **Full-Length Films:** 9 (most of them are, though, stand-up comedies recorded live).



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# NETFLIX ORIGINALS BRAZIL: FORMATS AND GENRES

GÊNEROS DAS OBRAS BRASILEIRAS



## NETFLIX ORIGINALS BRAZIL: GENERAL OBSERVATIONS

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- Low presence of Spanish language in the options “Other Languages” and “Subtitles” for non-Spanish-language films in the Netflix Brazil catalogue.
- Absence of productions from Portugal.
- Brazil does not have co-productions with foreign partners.
- Despite having a strong industry of cartoons and TV shows for children, Brazil does not have such products available on Netflix Originals.



NETFLIX

3%

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THE CASE STUDY OF 3%



# THE CASE STUDY OF 3%

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- The original script was written by students from the University of São Paulo to compete in a public television contest.
- The first version produced was made available on YouTube.
- An improved version of the original script has been rejected by several television channels.
- In 2014, the Netflix International Content Director then, Erick Barmack, contacts Boutique Productions after watching the first version of 3% on YouTube.



## THE CASE STUDY OF 3%

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- Netflix intervenes at every stage of both preproduction and production.
- Meeting in Miami for a script doctor's workshop.
- Discussion about the choice of each actor and actress (director Cesar Charlone's demand that 50% of the actors to be composed of afro-Brazilians caused strangeness in the American team)
- Use of metadata to advise script development.



## THE CASE STUDY OF 3%

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- Charlone: “Netflix made available to us a wonderful script doctor and called us to do the workshop together. Then we went into a nearly six month process of rewriting the scripts - all very close, very much supported by Netflix. [...]. Then, when preproduction started, it was a ... I would call it “control” or at that point I would have used the expression “control”. I would tell you today it was about “partnership.” They said, as producers of the programme: “Wow, but this actor, what do you think? He doesn't look so interesting.” Then, I would reply: “no [he's not indeed], but he's a typical Brazilian kind ... what do you think?”. So it was a negotiation. [...]. We used to do [meetings] by Skype [...] everyday, showing them the cast, showing them the location ... everything, everything, everything was watched very closely.”



# FUTURE POSSIBILITIES FOR NETFLIX IN BRAZIL

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- High regulatory insecurity.
- Retraction of the government's investment in the audio-visual market.
- Local producers need to conform to Netflix standards.

THANK YOU SO MUCH!

¡MUCHAS GRACIAS!

MUITO OBRIGADO!

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