Streaming giants battle for Latin America

Subscriptions to such services are surpassing those of pay TV as the region attracts new platforms vying for a market that will reach 110 million consumers in 2025.

SOCIETY
Latin American productions get the global limelight bypassing movie theaters

ARTICLE
For Latin American music, quarantine is all about live-streaming performances
The contest for Latin America's audiences intensifies

The streaming war is raging on and Latin America is shaping up to be one of its main battlefields. Big media companies are increasingly keeping a close eye to the market due to its sheer size and potential for rapid growth. Latin America’s video streaming subscriptions will more than double by 2025.

Within the next few months, the industry is expected to surpass traditional pay-TV in the region for the first time in number of subscriptions. And much of this growth will come from new platforms landing in Latin America – Disney+ is scheduled to arrive later this year and HBO Max in 2021. Incumbents Netflix and Amazon Prime Video will surely step up their efforts – and investments – to keep their viewership bases. Different formats such as free, ad-based services may also prove themselves to be strong competitors to global and local platforms alike.

All this movement is impacting the way regional producers are coming up with films, shows and series, as well as how this local content is being consumed all around the globe like never before.

This edition of LABS Collections brings a comprehensive overview of video streaming in Latin America, with exclusive interviews, articles, insights, and infographics with the latest data. Enjoy your reading!
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NEW PLATFORMS WILL FURTHER BOOST VIDEO SERVICES IN THE REGION

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Streaming giants battle for Latin America

This year, subscriptions to video streaming services will surpass those of pay-TV for the first time, as the region attracts new platforms striving to compete with Netflix – and gain their share of a market set to reach 110 million consumers in 2025

BY JOÃO PAULO PIMENTEL

The streaming wars are a global fight, but the next 12 months will be crucial on Latin American battlegrounds. Not only will the region receive two platforms of media giants capable of fighting on an equal footing against Netflix, but also the number of subscribers to this type of service will exceed, for the first time in history, the traditional pay-TV customer base in 2020. Latin America should end 2020 with 62.2 million subscribers to streaming video services, a 36% growth compared to last year’s figures. Even more impressive are the projections for the near future. By 2024, the region should have 110.7 million users on these platforms – which, in industry jargon, are known as OTT, or over-the-top, a term used to designate the offer of audiovisual content over the internet.

Pay-TV via cable or satellite, in turn, will remain stationed in the current range of 57 million subscriptions, after having recorded its peak in 2016. These data were passed on to LABS by Ampere Analysis, a market research firm specialising in media, content, and communications.
“Latin America is expected to be the second-fastest-growing region in terms of proportional increase of subscriber base in the next 5 years, with the subscriber base more than doubling from 2019 to 2024, second only to Sub-Saharan Africa where current subscriber numbers and penetration is relatively very low,” says Lottie Towler, senior analyst at Ampere Analysis.

The growth is closely linked to the debut of platforms backed by media and technology giants. Disney+ will launch in Latin America in the last quarter of this year, while HBO Max prioritized the region to be its first market outside the United States in 2021.

Both of them offer a huge catalog to compete with already established services. The pioneer Netflix is expected to maintain its leadership position, but the competition it will face will be heavier. Amazon Prime Video and Apple TV+, which have been operating in Latin American countries since 2016 and 2017, respectively, will certainly not be passive spectators of the fight. Regional platforms, such as Claro Video, Blim TV and Globoplay, will also make important moves in the field, whether by trying to grow their own bases or establishing coveted partnerships for content distribution.

Digital TV Research, a consultancy that provides business intelligence for the television industry, predicts that the five major global platforms – Netflix, Amazon Prime Video, Disney+, Apple TV+ and HBO Max – will dominate 88% of streaming subscriptions in Latin America by 2025. The firm estimates that the subscription segment (or SVoD, for Subscription-based Video on Demand), excluding advertising-based services (AVoD, Advertising-based Video on Demand), will reach 106 million customers in Latin America within 5 years, a 152% increase over 2019.

“Latin America is already very important for Netflix. Brazil is the company’s second-largest international market [after the UK]. And it is crucial for the main platforms to have original content. If you are Netflix, for example, and you have 31 million plus subscribers in Latin America, you want to keep them happy. There has been quite a lot of investment in several countries around the region as I understand it,” said Simon Murray, principal analyst at Digital TV Research, in an interview with LABS.

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**Streaming and Pay TV Services Subscriptions in Latin America -000s**

In 2020, streaming platforms are set to surpass traditional pay TV services in total number of subscriptions across Latin America.

<table>
<thead>
<tr>
<th>Year</th>
<th>Streaming (OTT*)</th>
<th>Pay TV</th>
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<tbody>
<tr>
<td>2012</td>
<td>2099</td>
<td>57019</td>
</tr>
<tr>
<td>2014</td>
<td>55137</td>
<td>56660</td>
</tr>
<tr>
<td>2016</td>
<td>61053</td>
<td>56840</td>
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<tr>
<td>2018</td>
<td>60055</td>
<td></td>
</tr>
<tr>
<td>2020**</td>
<td>62222</td>
<td></td>
</tr>
<tr>
<td>2022**</td>
<td>93669</td>
<td></td>
</tr>
<tr>
<td>2024**</td>
<td>110764</td>
<td></td>
</tr>
</tbody>
</table>

*Over-the-top (OTT) services are streaming media offered directly to viewers via the Internet, bypassing cable, broadcast, and satellite television.

**Projections

Source: Ampere Analysis
**Investment in local content**

Indeed, in addition to growth in the number of subscriptions, the first half of the 2020s is likely to be a period of heavy investment in local content. The big platforms are likely to expand their portfolios produced in Latin America, with a growing menu of series, films and documentaries in Spanish and Portuguese.

The movement is already clear: 15% of the films and series recently announced by Netflix and Amazon Prime Video, the two big international platforms already established in the region, will be in Spanish or Portuguese, according to Ampere Analysis, which tracks the content commissioned by major services. A part of these programs are produced in European countries, mainly Spain or Portugal, but they have great appeal among the Latin American audience.

"Platforms are investing quite a lot to make their offerings more localized in these regions, which will sort of provide more competition for the local platforms, as that’s one area that historically local platforms have been able to differentiate themselves with offering local, regional content", says Towler, from Ampere.

On the other hand, regional investment can bring good global results. Ampere, which tracks Netflix top 10 charts in 60 countries, has noticed an increasing interest in Spanish-language shows. "A number of titles, such as *Money Heist* have been really successful not only in Spanish-language countries but also in other markets too," says Towler.

**The native competitors**

In all their movements, the giants will encounter local competition, represented mainly by major TV networks or mobile telecom companies, such as Globo (Brazil), América Móvil and Televisa (Mexico), and their respective streaming services Globoplay, Claro Video and Blim TV. But regional platforms will face an uphill battle, since global services tend to follow in the footsteps of Netflix and produce a smaller proportion of their content in the U.S. and increase internationally commissioned shows and movies. "When it comes to local services, obviously, the challenge is the budgets they have. It’s hard to compete with the giants when they’re investing so much in their own, original content," reckons Towler.

According to Murray, of Digital TV Research, there is room in Latin America for other formats, like what he calls "import platforms", which usually aggregate pre-produced content. "I am surprised that Televisa and Globo, for example, haven’t got more into this than they have done given the content that they have. Obviously, they have existing deals with broadcasters and pay-TV operators around the region that they don’t want to spoil, but you would think that those two companies are ideally placed to explore the AVoD market”

According to the consultancy, Claro Video will continue to be the largest local player, going from 2.7 million to 4.5 million subscribers until 2025, but all regional services should face difficulties in gaining new subscribers. Blim TV and Movistar Play, which is controlled by Spain’s Telefónica, will grow little – the first, from 297,000 to 600,000 users; the second, from 392,000 to 800,000.
Digital TV believes a lot more people will receive these platforms for free, as added features to premium subscriptions in the mobile or pay-TV sectors. Brazilian Globoplay does not disclose any concrete numbers and therefore international consultancies do not track its evolution.

The pandemic and digital services
In addition to new services, the search for convenience and technological developments, the Covid-19 pandemic offers another boost in demand for digital services in general, including in Latin America, and even in the midst of the serious crisis caused by the virus. Measures of social distancing have led people to seek more entertainment in their homes, and there is no prospect of a simple recovery for movie theaters on the horizon.

JustWatch, a streaming guide that monitors the sector in 46 countries, identified an explosion in the use of platforms in the two largest markets in Latin America. In Mexico, between March 15 and the first half of May, HBO Go has seen its traffic quadruple, while Amazon more than tripled and Netflix recorded a 188% growth in access. In Brazil, even in a shorter observation period, from early April to mid-May, increases were above 100% across the board, with Amazon users getting close to tripling their accesses.

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The pandemic gave a boost to video platforms, and streaming traffic more than tripled for some services in Mexico or doubled in Brazil.
LABS is a business news website about Latin America, focused on economics, business, technology and society. By providing deep and accurate content about the economic and technological landscape of Latin America, both in Portuguese and English, we help readers understand the region’s particularities.
Netflix will be the streaming leader in Latin America in the foreseeable future

By 2025, analysts expect the platform to reach 48 million Latin American subscriptions, well ahead of competitors. But its market share across the region may drop from 75% to 45%

By João Paulo Pimentel

Latin American audiences will be able to choose between all the major global video streaming platforms by the end of 2021, but none of them will take Netflix away from the market leadership anytime soon. According to Digital TV Research, the firm will reach 48 million subscribers in the region by 2025, a 54% growth in six years that may guarantee 17 million more users than its closest competitor. That’s enviable.

But the projection hides a revealing fact on the increased competition in the streaming market. Last year, Netflix alone commanded 75% of streaming subscriptions in Latin America; in 2025, even with robust growth, the market share under its control will be around 45%. Significantly smaller, but the company will still have almost half of the pie for itself.

LatAm subscribers by service -000s (Q1 2020)

Netflix is the dominant force in video streaming but will soon face competition from media giants in Latin America

<table>
<thead>
<tr>
<th>Service</th>
<th>Subscribers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Netflix</td>
<td>34,318</td>
</tr>
<tr>
<td>Blim</td>
<td>1,151</td>
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<tr>
<td>Prime Video</td>
<td>6,987</td>
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<td>DAZN</td>
<td>740</td>
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<tr>
<td>Claro Video</td>
<td>3,687</td>
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<tr>
<td>CableVision</td>
<td>373</td>
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<tr>
<td>Flow</td>
<td>107</td>
</tr>
<tr>
<td>Apple TV</td>
<td>3,218</td>
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<td>Looke</td>
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</tbody>
</table>

*Globoplay does not publish its numbers so the service is not tracked

Source: Ampere Analysis

Interest in Streaming Platforms in April

JustWatch tracks access of streaming services among 20 million users in 46 countries. Netflix and Amazon lead interest among Brazilian and Mexican audiences

Source: JustWatch
According to Netflix’s results during the last quarter, revenues in the region were affected by the devaluation of local currencies, even if the platform has gained 2.9 million new subscribers from January 1st to March 31st 2020 – an expansion of 9% versus a 3.4% increase in subscriptions in the United States and Canada.

Reed Hastings, CEO of Netflix, stressed last year that gaming and sleeping are among his main competitors, but there is no denying that direct challengers to his company are getting stronger. Globally, Netflix now has 182.8 million, and solely by its sheer size it will be hardly displaced soon – or ever.

In the meantime, the firm remains committed to its famed ability to reinvent itself – and it highlights the “traditional” origins of those services set to be its two biggest competitors. “Our subscribers have always had a lot of choices when it comes to entertainment – including from Disney and Warner [HBO’s owner]. To stay ahead of the competition, we had to reinvent ourselves several times: we switched from DVDs to streaming; started producing original content and not only licensing; and we expanded to films beyond series”, said the Brazilian division of the company, in a statement sent to LABS.

The strategy for Brazil, where its subscription base accounts for almost a third of Latin America, focuses on the variety and diversity of content. “We will produce stories tailored to different languages and preferences and that can entertain our subscribers no matter what they are seeking,” says Netflix. “We are always searching for the best stories to tell from different perspectives and cultures, no matter the format, and for that we work with established talents and new voices. Pedro Aguilera is a good example of this – fresh out of college, he created our first original Brazilian series, 3%, whose first season had half of its audience coming from outside Brazil.”

Lottie Towler, senior analyst at Ampere Analysis, a British consulting firm that specializes in media, notes that the streaming giant is investing ever more in content produced outside the United States. "Netflix is starting to very much localize its content. It might have an advantage in certain markets where this local content is favored over US produced shows that new competitors will be offering", she says. "For the time being, HBO Max, Disney+, Peacock, their upcoming commissions and the shows that they are working on will be almost all US produced."

Local partnerships are not to be ruled out. "We want to bring the best stories to our subscribers, regardless of where they were made. We have agreements and partnerships with some [Brazilian] TV stations, such as Record and SBT, not only to license their content – we already show Stranger Things on SBT, for example”, says the company.
One platform to rule them all

Even not taking into account its future strategy and goals, Netflix’s huge advantage point is its household status across Latin America, where its brand is sometimes used as a synonym for video streaming services. The firm massively dominates across the region, where it has been present for 9 years. “In some of the key markets as in Mexico, for example, Claro Video does as well as Amazon, but both are dwarfed by Netflix’s success”, reckons Towler.

According to JustWatch, an international streaming guide, Netflix leads the interest of viewers both in Brazil and Mexico, swaying 30% to 35% of its charts, which include pay-per-view streaming platforms. JustWatch measures the audience’s interest by tracking its 20 million monthly users in 46 markets, according to their inclusion of movies and shows to personal watchlists, clicking out to the streaming services as well as selecting the platforms they subscribe to.

Pricing will be key

Apart from content, pricing will be a key weapon in this fight. Amazon Prime Video and Apple TV+ charge BRL 9.90 monthly, while Netflix’s basic subscription (which does not offer HD videos) costs BRL 21.90 in the country. Entrants’ prices may rise, but low cost and free trials are going to be a form to lure customers away from Netflix. As for upcoming Disney+ and HBO Max, no one knows their pricing plan for Latin America – in the US, Disney’s platform is cheaper while HBO’s launched charging a higher price than rivals.

Nevertheless, due to exchange rates, the average monthly subscription fees in Latin American countries are among the cheapest and least profitable worldwide. Platforms reduce them to scale up. “We base our prices on the value we add to our members and on the desire to ensure that our service remains accessible to people”, explains Netflix Brazil.

In Brazil, for instance, the company saw its revenue decline by 25% in the period – its standard, intermediary subscription plan was worth $8 in 2019 and now hovers around $6. For its basic plan, the drop was from $5.30 to $4, less than half of what it costs to US consumers.
we search, we create, we live the content

FUN • TECH • FASHION • POP • HOME • S.O.S

The Shoppers is renewed. We have built a team to find, engage and entertain your costumer with the right and proper content on e offline. Marketing, performance, ads, events, video and social media. The whole thing. The complete solution for your Latam Marketing campaign. We built content tailored for you and your audience.
TECHNOLOGY

Disney+ and HBO Max to take advantage of Latin Americans' stacking of platforms

In Brazil and Mexico, viewers already use more than 2 streaming services. Disney will likely be the most serious contender to Netflix's dominance, but HBO is prioritizing its sizeable regional base.

BY JOÃO PAULO PIMENTEL

Latin Americans have plunged into the realm of streaming video. In recent times, this does not mean that audiences in the region are merely subscribing to one of the available platforms, but that they are piling them up. In Brazil and Mexico, each streaming consumer already adopts an average of 2.5 services, according to a survey by Ampere Analytics, a British media consultancy.

No one knows for sure if the stacking of streaming platforms is sustainable, after all consumers who subscribe to three different services may already be spending the same, or even more, than they used to cough up for traditional pay-TV packages. But new market entrants must see the trend as a way to win over customers from leader Netflix. Upcoming Disney+ and HBO Max are vying to be "second choices" initially, and then entice viewers to keep subscribing if they need to choose among platforms.
“The LatAm stacking rate will get closer to the higher levels of Western Europe. So, obviously there’s a lot of growth opportunity for new players entering the market, as consumers are taking more and more services”, says Lottie Towler, senior analyst at Ampere.

Big international players have been splitting Latin America into Spanish and Portuguese-speaking markets, with platforms operating on both sides of the divide, but adopting different rollout schedules and strategies. Disney+ and HBO Max will launch in the region in late 2020 and 2021, respectively. Although neither firm has disclosed in which Latin American countries they will start operating, they are likely to follow the pattern.

Disney's silver medal
According to forecasts made by Digital TV Research, a firm that provides business intelligence for the television industry, Disney+ will be the second biggest streaming platform in the region in a few years. The consultancy predicts that, by 2025, it will have 31 million subscriptions across Latin American markets – roughly the figure Netflix reached at the end of 2019. "Disney has been very successful in the countries where it has started so far. Partly because it is a brand with global appeal and partly because it has been very good at pre-selling, getting subscriptions up before the launch of services. We think that Disney+ will have a very fast take-up in Latin America and that Brazil will be its third-largest market", Simon Murray, principal analyst at Digital TV Research told LABS.

### Average number of services taken per subscriber

Users in Mexico and Brazil have been stacking up platforms. Analysts say consumers may seek services specialized in sports, for example, or video-on-demand providers.

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<thead>
<tr>
<th></th>
<th>BRAZIL</th>
<th>MEXICO</th>
</tr>
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<tbody>
<tr>
<td>Q1 2018</td>
<td>1.4</td>
<td>1.6</td>
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<tr>
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</tr>
<tr>
<td>Q1 2020</td>
<td>2.5</td>
<td>2.6</td>
</tr>
</tbody>
</table>

Source: Ampere Analysis Consumer Panel, an internet based survey that comprises 2000 respondents per wave in each market

### LatAm subscriber forecasts by big international platform for 2025 -000s

Analysts at Digital TV Research predict that Disney+ will be the second biggest platform in Latin America. HBO Max may compete with Amazon Prime for third place, depending on its strategy of keeping subscribers from its other services.

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<table>
<thead>
<tr>
<th></th>
<th></th>
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<tbody>
<tr>
<td>Netflix</td>
<td>48,000</td>
</tr>
<tr>
<td>Disney+</td>
<td>31,000</td>
</tr>
<tr>
<td>HBO Max*</td>
<td>2,200 (+10,000)</td>
</tr>
<tr>
<td>Amazon</td>
<td>11,000</td>
</tr>
<tr>
<td>Apple TV+</td>
<td>2,700</td>
</tr>
</tbody>
</table>

*HBO Max will be much higher than 2.2 million due to the migration of existing premium pay TV subscribers, which in 2019 were around 10 million across LatAm, according to the company.

Source: Digital TV Research
**HBO’s advantages in LatAm**

HBO Max, the new platform by AT&T’s WarnerMedia, has made the region a priority in its plans for international expansion. It will land here only in 2021, but Latin America will present its first pools of foreign subscribers outside the US. Digital TV Research predicts that in the next five years it will add 2.2 million users on top of its base of current subscriptions – viewers of both pay-TV and on-demand service HBO Go that will likely migrate to the new platform at a discount or at no additional cost. Last November, John Stankey, COO at AT&T, revealed that HBO reported 10 million clients in the region. In that case, HBO Max may be in a fight for third place with Amazon Prime Video.

The battle for new users will increasingly be fought outside the U.S. But expanding in international markets, where 80% of Netflix’s recent growth is coming from, is comparatively more expensive because content needs to be tailored for different cultural tastes.

“HBO has an advantage in Latin America, in terms of an addressable user base at the start. A good part of current HBO subscribers may transition to HBO Max. They’re aiming for a large portion of the international subscribers, so LatAm is definitely an important market for them”, says Towler.

In the U.S. launch, HBO’s price has called attention. Available at $15 a month, it is charging viewers more than Disney+ ($7), Netflix’s basic plan ($9) and Amazon Prime ($13). That may be a risky business strategy, particularly in more price-sensitive emerging markets. But, in terms of libraries of content, Max’s only rival capable of enticing subscribers at the same level, is indeed Disney.

“How many subscriptions can homes or people watch? I think that’s quite an interesting point”

**Vast libraries**

With 500 films and 7,500 episodes of television from Walt Disney Studios, Pixar, Marvel, Star Wars, National Geographic, and more, Disney+ is the exclusive home for some of the world’s most famous stories as well as a robust slate of original content. HBO Max also offers new originals and 10,000 hours of content including its branded service, together with titles past and present from Warner Bros.’ 100-year collection, as well as from DC, CNN, TNT, TBS, Cartoon Network, Crunchyroll, among others.

As for the stacking of streaming services, users may start looking for specialized platforms – such as DAZN’s sports-focused offering – or free, ad-based ones – like YouTube TV and ViacomCBS’ Pluto – or even those which are handed as an extra benefit of a premium telecom or linear-TV subscription. “How many subscriptions can homes or people watch? I think that’s quite an interesting point. I would say three or four for most people. Some services offer exclusivity, as far as sports are concerned”, reckons Murray.

Anyway, this argument points to one conclusion: all big services will compete hard and cross swords to be the “standard”, non-disposable platform for as many subscribers as possible.

Streaming wars, indeed.
Amazon will struggle to keep its "number-two" status

Prime Video's expansion has been linked to services offered by the e-commerce giant. Market forecasts put it fighting for third place in subscriptions across Latin America in 2025

BY JOÃO PAULO PIMENTEL

Three and a half years after its arrival in Latin America, Amazon Prime Video has amassed 7 million subscribers across the region, where the platform consolidated itself as the second biggest force in video streaming. In total numbers, the size of Prime Video is about a fifth of Netflix's base of Latin American customers. On the one hand, it has ample room to grow; on the other, it is poised to suffer more than its main rival with the launch of big new entrants in the market.

Amazon's strategy has been very different from the start. Initially branded in the US as Amazon Unbox, Amazon Video on Demand and Amazon Instant Video, the service had its expansion strongly linked to the Amazon Prime membership program that gives users of the e-commerce firm access to services, such as expedited delivery, at no additional cost.

Forecasts made by Digital TV Research, a consultancy specializing in the industry, paint a 2025 scenario where Prime Video, with projected 11 million subscribers, may be fighting with HBO Max for third-place in Latin America, after being surpassed by Disney+. "We think Prime Video won't take off as much as it has done inside the US. It is present in 200 countries worldwide, but with a pretty blanket approach. Amazon Prime [the premium subscription of the e-commerce platform] is only available in 19 countries. In Latin America, it is available in Brazil and Mexico. Outside those countries, I think it will have little appeal", says Simon Murray, principal analyst at Digital TV.

But, of course, the streaming wars will offer a dynamic, hard to grasp, picture for quite some time, and part of this unpredictability has to do with Big Tech's behavior in the field. Amazon and its peers may not be the guardians of instantly recognizable content yet, not on par with Disney's and Warner's at least, but they do have another equally relevant asset: piles of cash to spend. Jeff Bezos's company is spending it wisely, installing experienced media and entertainment executives and creative minds to guide it through and investing in high-quality content that is making inroads in awards ceremonies like the Oscars and the Golden Globes.

Apple being bitten

Apple, the other Big Tech trying its hand in video streaming, has avenues for distributing media through its own hardware. Unless it invests more in exclusive shows or steps up deals with content providers, though, it may soon reach a ceiling for Apple TV+ in Latin America, where Apple's devices are comparatively expensive and not as popular as in the US.

"Apple TV+ has been giving away a year's free subscription to buyers of Apple's top product. I don't think many of these people will subscribe afterwards if they have to pay for the service. There aren't many originals on it. Very, very little exclusive content. We think it will have a limited impact and only 2.7 million subscribers by 2025", concludes Murray. If confirmed, this would actually mean the platform will lose 15% of its current base of subscriptions in Latin America.
Disney+ and HBO Max are supposed to be the streaming services capable of shaking Netflix’s dominance in Latin America. But a number of other companies see the region as an interesting international market for a different streaming model: the advertising-based video-on-demand (AVOD).

Among the newcomers into the region, PlutoTV (the free platform of the American media giant ViacomCBS), Roku (a hardware player that allows users to watch streaming TV content from other platforms and end up creating its own streaming service), and Plex (a media server already known as an option for organizing digital libraries which started to make available a large catalog of independent productions monetized via ads that the user cannot skip) explore this model.

“We’ve seen quite a lot of AVOD services in the US that has been doing quite well. Pluto TV is one of them. Tubi is one of the larger ones. And I think this is something we’re really starting to see, as consumers reach the ceiling of how much they’re willing to pay for their services,” Lottie Towler, Ampere senior analyst, told LABS. “For markets that potentially are price-sensitive, this could be a good business model because they do bring you the catalog of things (that you want to watch) to back it up,” highlighted Towler.

Combined with a diversity of offers from different players, and a regionally customized catalog, the advertising-based video-on-demand model is likely to be largely adopted by the region.

BY FABIANE ZIOLLA MENEZES AND JOÃO PAULO PIMENTEL
PlutoTV debut date it’s not defined yet, but in May, the company confirmed to LABS that it will debut in Brazil in late 2020. Less than a month before that, it launched in 17 Spanish-speaking Latin American countries, whose figures the firm still does not disclose. Ambition must be big, though. In the United States, Pluto TV has 22 million active users per month.

“We want everyone to find their favorite movie, series, or show on Pluto TV and be able to enjoy it in their language, safely and free of charge”, said senior director of content and programming at Pluto TV, Arelys Carballo, in May, adding that in Latin America there is a large offer of paid SVOD (subscription-based video on demand) services, but almost none in terms of AVOD, like the one offered by Pluto TV.

Streaming platform or player device?
Just before its market debut, investors saw the company as a hardware seller, as Roku’s device sales accounted for 59% of its total revenue. That changed a lot in the years that followed. In 2019, its ad-based platform generated most of the company’s revenue ($740.8 million from $1.13 billion), and device sales only 34% of the total. As pointed out by the tech analyst Beth Kindig in an article on Forbes, “what investors initially failed to realize was that the hardware player was a means to its high-yielding ad platform”. The analyst stressed that “Roku has an added advantage from the data it has on consumers due to owning the hardware and the many content apps that need access to an OTT device”. And the data is everything nowadays.

In the 2019 last quarter presentation, executives from Roku said that “roughly half of all U.S. TV households will have cut the cord or never had traditional pay-TV” by 2024—a quarter before more than 90% of its advertising business’s revenue came from the U.S. Not satisfied with that, the company started its internationalization, beginning in Europe, and arrived in Brazil in January this year, through a partnership with AOC to launch the AOC Roku TV in the country.

Like other Roku TVs (in 2019, nearly one in three smart TVs sold in the U.S. were Roku TVs, according to the company), the two models made available in Brazil offer Roku’s personalized home screen, built-in search, a Roku remote, automatic software updates, besides the support for the Roku mobile app. Roku’s Channel Store allows customers to choose from more than 5,000 streaming channels. In Brazil, the AOC Roku TVs cost between BRL 1.199,00 (32-inch HD TV) and BRL 1.599,00 (43-inch FHD TV). Today, Roku has more than 32 million active users and wants to reach 45 million by the end of 2020.
A good library is key
In this ad-supported model, the partnership with different platforms, studios, and channels is also what makes the difference. According to information from the Nasdaq news service, Roku already has 15 global content partners, not to mention the local ones of the markets it has started to explore, such as the Brazilian Globoplay, the service of the largest open TV channel and communication group in Latin America.

Pluto TV Latin America, in its turn, currently offers 12,000 hours of content from around 60 partners in Argentina, Bolivia, Chile, Colombia, Costa Rica, Dominican Republic, Ecuador, Guatemala, Honduras, Mexico, Nicaragua, Panama, Peru, Paraguay, El Salvador, Uruguay, and Venezuela. In Brazil, the company has not yet revealed its partner content brands.

In May, Plex announced a partnership to extend its free content library with Crackle, Sony’s streaming platform that left Latin America last year. The association between the two platforms is initially limited to the United States, but a statement on Plex’s website says international markets will also see an improvement in free content in the near future. It is this new library of thousands of films and shows, including titles such as Captain Phillips, Hell’s Kitchen, and 3rd Rock From the Sun that can make the service really grow.

Well-known as a media server to organize and stream personal media collections, Plex launched its free, ad-supported streaming service in the U.S. and 220 more countries. In Latin America, the service it’s available in Argentina, Bolivia, Brazil, Chile, Colombia, Costa Rica, Dominican Republic, Ecuador, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Panama, Paraguay, Peru, Venezuela.

Catalog versus originals
Disney’s Hulu, which should arrive in Latin America in 2021, following Disney+ debut in the last quarter of this year, also bets on the ad-supported as a part of its business model—last year, Hulu SVP of advertising Peter Naylor told Variety that about 70% of its total audience is on its ad-supported plan.

For some years, Hulu stood behind Netflix and Amazon Prime Video when it comes to originals. But this changed with The Handmaid’s Tale massive hit. Based on Margaret Atwood’s classic novel, this series debuted in 2017, won Emmys, and propelled Hulu to a new level. After that came other successful productions, such as the teen comedy PEN15, Ramy, a series made to make you reflect on life, and the adaptation of the novel by the Irish author Sally Rooney Normal People.

Beyond its own originals, Hulu also has a great catalog that, since March, includes FX’s original series. This was possible because Disney acquired 21st Century Fox and made a deal with NBCU, which gave the company operational control over Hulu.

Netflix has hundreds of thousands of content options in its catalog. Still, it launched more than 300 original productions in 2019, which indicates that, yes, exclusive content is important. Hulu does not reveal the size of its catalog—some consultants estimate it to be somewhere between 2,000 and 3,000 titles.

The great asset of Disney services, however, may be in Disney Bundle, the subscription package offered in the U.S. which brings together Disney +, Hulu, and ESPN + all at once, and at a lower price ($12.99) than subscribing to the services separately ($17.97). Something like this can also work with Latin Americans, who are quite used to buying products and services in combos.
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The whole world is quarantined. Or it was supposed to be. We know that a part of Asia, China mostly, and Europe, has started to open the doors to the population, but a lot of people are still working from home and in their free time they are still at home – or they should be. The thing is: we’re discovering new ways to entertain ourselves and our families, while still keeping in touch with those who are out there.

Studies and researches keep saying that we’ll create new habits, but so far the numbers show anticipation or growth in a number of trends that we already followed before the COVID-19 crisis. Our relationship with music is one interesting topic to explore cause our first reaction is to say that this segment is growing, but it is not that simple – especially in Latin America.

The year-on-year growth of platforms that deal with streaming audio displays a huge rise this year. According to a Counterpoint Research paper, there are more than 350 million subscribers in this market in 2020, which represents 32% more than last year. But that was reported in early March before the coronavirus hit western economy for real and our habits really began to change.

The most recent studies show that companies like Spotify are registering a drop in streams of the top 200 songs which usually exhibit growth inside the platform. It doesn’t mean that people are dropping off the audio streaming business, because another study, this one from Kantar, shows a surge of 42% in usage of audio streaming services. So, what is really happening?

It would sound misleading or at least naive to say something for certain in this time of crisis. On the other hand, we can say that streaming is growing and we are remodeling our relationship with it. Video streaming for instance is showing nothing but growth, Netflix data spikes day after day – it’s really the golden era for this segment. On the audio side, we can see that people already deal with it as a common thing for streaming services, it’s already inside our day to day activities during most hours.

For Latin America's music, quarantine is all about live streaming

Over the last weeks, Brazilians have been breaking global audience records on YouTube live-streaming concerts. Audio platforms must be paying close attention
**Live streaming’s golden era?**

Nowadays, the usage of music streaming has grown, but it did not register newcomers, and this pushes the industry to a new challenge. How to advance in this time of crisis? The platforms are still trying to figure out but the artists, especially in Latam, found out a good way to stay tuned: live streaming shows.

In the past two weeks, Brazilian artists like Marília Mendonça, Gusttavo Lima, and Jorge e Matheus – three of the biggest singers in Spotify in Brazil – made concerts on YouTube and broke all the records in the platform.

In April, Marília broadcast the biggest live video in the history of YouTube with more than 3.3 million concurrent viewers. In fact, of the ten largest lives in the history of YouTube, all held between April and May this year, seven are Brazilian.

In April, according to a report by BTG Pactual with data from YouTube and Decode, 30 Brazilian musical live videos had a total of 206 million views. About 90% of the shows broadcast on the Internet in that month were by artists who sing two of the most popular music genres in the country: sertanejo (67%), Brazil’s country music, and pagode (23%), a more melodic version of samba. From February to April, the search for the keyword “live streaming” grew 85% in the country.

To do a comparison, the international artist that came closest to that mark was Beyoncé with 458,000 viewers in a live video streamed in 2018.

Almost every day in Brazil since the last week there is a live video on YouTube with more than 1 million people watching, commenting, and sharing content on social media. The explanations for this are many: the Brazilian's taste for Brazilian music; the strong engagement of the country's artists with their fans; and the orality of Brazilian culture, with an open TV strongly present, and which educated people to be entertained by the audiovisual.

If audio streaming isn't gathering new kinds of users, there is one segment to which they could start to pay attention, the one that likes to watch their favorite artist doing a live show. It's early to say that this will be a common behavior after the pandemic, but for the artists, it showed a new way to monetize their music. Maybe it is a way for audio platforms to also expand their product? We'll see soon enough.
How streaming platforms are taking Latin American productions to new global audiences

Productions from Brazil and Mexico are now attracting audiences around the world without relying on movie theaters. But to what extent is the streaming era shaping how these works are produced and consumed?

BY ANNA LIMA

It is true that Latin American productions have already established themselves in the world film industry. With a track record that brings together a long list of Oscar nominations, in addition to other awards, titles such as the Brazilians City of God and Central Station, the Argentine The Secret in Their Eyes, the Mexican Pan’s Labyrinth and more recently, Roma, from the also Mexican Alfonso Cuarón, helped make Latin America a reference when it comes to cinema.

But, if before, for these productions to reach a foreign audience, there was a great dependence on the cinema distribution - via large productions or through titles aimed at an independent movie audience - now, they gain another pace. And other screens. "Our foray into Latin America in 2011 reflects our belief that the entire region, from Brazil to Mexico, wants to see their own narratives reflected on the screen," says Francisco Ramos, vice-president of International Originals for Latin America at Netflix, in an interview to LABS.

"We quickly started to produce in the region - first in Mexico, then in Brazil - our first two series made outside the United States," he recalls. In April, during the biggest creativity and innovation event in Latin America, Rio2C, Netflix announced its plans to release by the end of 2020 thirty original Brazilian productions, among films and series.
"Streaming brought many opportunities for Brazilian productions. With the arrival of platforms like Netflix, Amazon [Prime Video], Globoplay, and others that are yet to come, the demand and the need for the Brazilian product has increased a lot," Andrea Barata Ribeiro, partner and executive producer at O2 Filmes said in an interview to LABS. The films City of God and Blindness, directed by the renowned Brazilian filmmaker Fernando Meirelles, and the original Netflix series Brotherhood are some of the works that O2 Filmes carries in its long-standing portfolio.

The large audience of these productions are still their home countries, but there is already a movement of foreign audiences turning their eyes to Latin or Hispanic productions. "I do believe that the content is more likely to travel. Take the tremendous success of Money Heist. Good content, a good story, and the possibility of having it at hand increase the chance of your product being seen abroad. We are still learning to explore these possibilities and I believe that the world will become more flexible to content from all over the world," explains Ribeiro.

The South Korean film Parasite, by filmmaker Bong Joon-ho, shows the power of this movement. By winning four statuettes at the Oscars 2020, the production made history by becoming the first non-English title to win the Best Picture award. He pointed out that "once you overcome the one inch tall barrier of subtitles, you will be introduced to so many more amazing films," in reference to the North Americans’ lack of habit of watching movies in other languages.
A variety of stories

The genres of Latin productions that arrive through subscription platforms are also diverse. Not that this was an advent of these services: titles of the most varied genres were already produced even before the streaming era. But what seems to have changed is the speed at which these productions are crossing oceans.

In 2018, the American-Colombian coproduction Narcos was the fifth most in-demand SVoD original series in the world, according to data from Parrot Analytics, data science company that measures the global demand for content on platforms. 3%, a Brazilian science fiction series, also from Netflix, had half the audience of the first season coming from outside Brazil, according to information from the Brazilian division of the company.

For the partner and executive producer of O2 Filmes, the genres sought by the platforms when producing their originals in Brazil change from time to time. “At the moment it is almost unanimous to hear that the desire is a product to engage the young audience. There was a time when they were looking for leading female characters. I think that changes all the time,” says Ribeiro.

With an eye on this localization strategy, other platforms have also been betting on Latin American productions. Amazon Prime Video, which has been operating in Brazil since 2016, launched in 2020 its first original productions in the country, including the reality show Soltos em Floripa and the docuseries Tudo ou Nada - Brazilian Selection. In Latin America, the platform also has original Mexican productions since 2018, in addition to productions under development for Argentina, Chile, and Colombia, with releases scheduled for 2020 and 2021.

Globoplay is another streaming service that, in Brazil, was already a leader in the number of subscribers, with 22 million unique visitors per month, but until then, it did not operate in international markets.

The service, run by the largest media company in Latin America, Grupo Globo, arrived in North American lands in January costing $13.99 and offering a catalog of original series that include the thriller set in the Amazon Aruanas, and the drama Harassment, a production also led by O2 Filmes.

”Authentic and local stories that have an impact on their countries of origin are the DNA of our programming. Partnerships with the best producers, writers, directors, casts, etc., in each of the countries where we operate, are our best way to find verisimilitude,” explains Ramos. The executive reveals that among the new releases on Netflix, are the premiere of the second season of Most Beautiful Thing, set in Rio de Janeiro in the 1950s, Reality Z, the first Brazilian series of zombies, in addition to the last season of 3% and the police thriller Bom Dia, Verônica.

“The Brazilian audiovisual is being maintained due to the entry of these platforms. If it weren't for that, we would practically be going back to the era where there was only advertising”

ANDREA BARATA RIBEIRO
PARTNER AND EXECUTIVE PRODUCER, O2 FILMES
“We are also working on the second season of Sintonia. More films, comedy specials, and nonfiction series will arrive for our subscribers in Brazil. In Mexico, we just launched the youth series called Control Z and our program also includes the second seasons of Monarca and Luis Miguel, in addition to the long-awaited new series about the singer Selena Quintanilla.” In Argentina, where Netflix announced the opening of an office this year, the most recent release is the first original film in the country, La Corazonada (Intuition), which premiered on May 28. “In Colombia, we recently released the second season of Sempre Bruxa [Always a Witch] and the first season of Chichipatos, which we have just renewed,” says Ramos.

**Changes in the audiovisual sector**

But if, on the one hand, the number of Latin American productions increased dramatically when streaming platforms started producing their originals, on the other, this did not necessarily democratize the access by more producers, tells Antonio Gonçalves Junior, partner at Grafo Audiovisual.

“There was a huge concentration in the same producers for streaming platforms and prime channels on pay TV, always on the Rio de Janeiro-São Paulo axis.” From the southern city of Curitiba, the film production company has in its portfolio award-winning works such as Ferrugem (Rust), winner of the awards for best film at the Gramado Festival and best Ibero-American film at the Seattle International Film Festival. The picture was also nominated for the Sundance Festival and was included in the list of Brazilian films selected in the final stage of the Brazilian Oscar selection.

For Gonçalves, the power of streaming platforms has to do with the possibility of immediate consumption and also with resources, since these services and prime channels on pay TV have started to invest in Brazilian productions with their own funds. As for the future of the sector in the post-pandemic scenario, the producer is betting on a more marked segmentation, with large productions dominating the theaters even more, while niche platforms, such as Mubi and the Brazilian Looke, celebrate independent production.

“Before COVID-19, O2 had ten series in production”, says the partner of the producer, who foresees the resumption of these works as soon as possible. Ribeiro believes that the trend for the sector in Brazil is for local productions to gain strength. “It is already more than proven that in order for the platform to grow in a country, there is a need to produce locally. Therefore, the tendency is that as the platform grows, the number of local content increases.”
SOCIETY

Reggaeton with a British twist

Reggaeton conquered the world stage from the U.S., now On Da Beat, an up-and-coming British studio, tests the global potential of acts produced in the UK.

That Latin music genres have been dominating U.S. charts is not big news. Ever since Puerto Rican Luis Fonsi’s Despacito and Colombian J Balvin’s Mi Gente broke in Billboard’s lists, back in 2017, a giant new wave of Latin pop acts singing in Spanish was brought into the limelight, turbocharged by audio streaming platforms.

Due to the huge size of the U.S. market, Latin American musicians received a lot of attention worldwide, and even in places where they are not properly considered mainstream, their trending styles – i.e. reggaeton and its related genres and subgenres – are influencing a host of other local scenes. On Da Beat, a London-based music studio and talent management company with roots in UK rap, noticed latent demand and its team is now working on developing acts of Latin origin in Britain.

According to Anthony Larbi, founding partner at On Da Beat, Latin music is not yet a huge selling point in the UK at present. “However we see the market growing exponentially in terms of the volume of new artists that are recording in our studio, so our thoughts are that the UK will eventually produce an act that will be able to play on the global playing field”, he told LABS.

In the U.S., Latin music has continued its strong ascension, and 2019 was the third consecutive year of growing revenues for the genre, which now accounts for 5% of the whole market. The Recording Industry Association of America (RIAA) recently revealed that the category generated $554 million, up 28% compared to the previous year – while the U.S. music market grew 13% on average. Interestingly, the big motor for Latin music is streaming, which accounted for 95% of total Latin music revenues in 2019.

Larbi says that breaking Latin acts in the British music market presents challenges, with language and infrastructure barriers still playing a significant role. On Da Beat’s strategy, he explains, is to connect these acts to a global audience, focusing on their native countries and Latin communities spread across Europe and North America.

“A team was formed to respond to the challenges and needs of Latino creatives and music executives working within the music industry in the UK. Their mission is to highlight the culture and provide a voice for Spanish- and Portuguese-speaking creatives and by doing so connect their stories to the wider diaspora.”
On Da Beat already recorded tracks by up-and-coming reggaeton acts such as Colombian Valenciz and Italian-Venezuelan Steffani Milan. They are not yet household names such as Bad Bunny, J Balvin and Ozuna, but that may be a matter of time – or, more to the point, finding that connection to their audiences.

“We aim to build on our tradition of opening up niche scenes and developing the careers of music producers with Latin music in the UK while still keeping true to our UK Rap roots”, says Anthony Larbi. LABS talked to him to know some more about the firm’s interest in Latin American cultural acts and the ground they are opening up internationally. Below are excerpts from the interview.

LABS How important are global streaming platforms to On Da Beat’s productions?

ANTHONY LARBI – For Latin urban music, it’s proof that a shift is happening globally. Streaming has definitely been part of the reason for the boom in Funk, the renaissance of Reggaeton and the rise of subgenres like NeoPerreo. For On Da Beat streaming is an important aspect especially as the music and the artists are reaching out to global audiences in their respective diasporas as well as local communities in their own city.

Part of the drive at On Da Beat this year is to share their stories and engage the cultures that they identify with. Streaming not only provides the platform to engage fans in Latin America, Africa and the rest of the world but also provide the data to know where and with whom to have conversations that will drive business and generate return of investment.

LABS When did Latin American music catch your attention?

ANTHONY LARBI I think the first time I went to a reggaeton event night was probably 2006. It was a one of a series of nights, the size of the nightclub was about 3,000 people and it was easily sold out. And this was not a one-off event. So there’s been a music scene in London for reggaeton and Latin music for a long time, but it’s kind of underground and it’s very localized to the parts of London where the community’s strongest.

LABS You’ve mentioned that more artists of Latin origin are seeking the studio.

ANTHONY LARBI More recently, in the last 12 months, there’s been a lot more artists recording music at our studio in Spanish, primarily. So it’s a quite interesting dynamic in London because you’ve got a lot of cultural melting pots. The Afro community and the Latin community, and loads of other communities, they pretty much live on top of each other, and what you find musically is that this influences the sounds. So you get Afro artists recording on songs that kind of sound reggaeton, and then you have reggaeton artists recording on songs that are more dancehall or more Afrobeats influenced.

And there’s a UK feel to it, a UK production, how can I describe... It’s a bit harsh. I think maybe it’s because of the weather because it’s always pretty much cold here.
LABS Do you see Latin rhythms influencing other pop genres in the UK? I’m thinking about what reggae and ska, not Latin but Caribbean styles, did to punk during the seventies.

ANTHONY LARBI Exactly. I wasn’t around, but my dad and my uncle, they were from that scene. Punk rockers and reggae artists, they would pretty much be in the same clubs, they would use the same venues, downstairs would be a reggae night and upstairs would be a punk night. And it’s kind of the same dynamic with afrobeats and reggaeton and dancehall and UK rap. It’s all kind of cross-pollinating.

LABS Can you tell me about On Da Beat’s structure, and its origins?

ANTHONY LARBI We did not start with Latin music, we started with UK rap and we didn’t start with artists, we started with producers and beat makers specifically because we thought they don’t really get the recognition that they deserve in terms of the process of making a song.

So we started managing producers. Then we got a big hit, [Big Shaq’s] “Mans Not Hot”, which charted in the UK, it charted in Germany and a few other countries around Europe.

And that brought in quite a lot of revenue.

So we upgraded and we moved location into a new studio, and that was a benefit for two reasons: we were able to offer people recording facilities and the shift to South London, made us a lot closer to the Latin community in the area that we’re in.

LABS Do you see Latin music becoming mainstream in the UK?

ANTHONY LARBI I think it’s a challenge. The primary barrier is language and the secondary barrier is infrastructure, such as dedicated radio stations. So this is something that’s not present in the market for Latino artists in the UK. Breaking in the UK is probably not going to be the main angle.

I think the best way is to connect these guys that are making music in their mother tongue to the places where they’re from. To connect them to audiences in Colombia, South America as a whole, connect them to the communities that are in the United States, communities that are in Europe.

LABS Would that bring them to a global audience?

ANTHONY LARBI I think that plugging them into those audiences will give them a global reach. So then they’re not really reliant on being a household name in the mainstream in the UK. But at the same time, the other angle is going fully into an English speaking track and accessing genres that are popular. Collaborations are becoming more common because, being cynical, if you’ve got genres that are streaming very well that are not necessarily depending on English speaking music, it’s a way to access a whole new market.

GottiOnEm, a music producer, at On Da Beat studio in London
On The Spotlight

From stories that date back to a few decades ago, to recent events in the region, check out this special selection of cultural tips and dive into some of the latest Latin American productions. Go beyond business and enjoy it!
### Business and Medican dark humor

Launched in 2018, *La Casa de Las Flores* (*The House of Flowers* in English), is a Mexican comedy and drama series created by Manolo Caro for Netflix. It shows the outward perfection of a family-run flower business that hides a dark side rife with dysfunctional secrets in a darkly humorous comedy series. The last season of the series has been available on Netflix since April 23.

*The House of Flowers (La casa de Las Flores)*, 2018, Netflix

### The Brazilian diplomat known by his first name

Sergio is a Netflix documentary directed by American Greg Barker. Co-produced and starred by Brazilian Wagner Moura, the biopic story follows the missions of the Brazilian diplomat Sérgio Vieira de Mello in East Timor and Iraq, where he represented the United Nations. The charismatic U.N.High Commissioner of Human Rights was killed by terrorists in Iraq. It was released on April 17 on Netflix.

*Sergio*, 2020, Netflix

### Youth and abstinence

*A Gaíola (or The Cage)* is a book by the Mexican author José Revueltas, from the ‘60s. It was written when the author spent time in prison after the student upheavals of 1968. The novel gathers three prisoners in a cell from where they observe everything about the place, living under the pressure of abstinence from drugs. The Latin American work of fiction recently gained a Portuguese version, translated by Samuel Titan Jr.

*The Cage (A Gaíola)*, Portuguese version, 2020, Editora 43

### A critical portrait of the class struggle in Brazil

*Arabia* is a Brazilian movie by Affonso Uchôa. It tells the story of Cristiano’s turning point and forms a critical portrait of the class struggle in the 21st century in Brazil. Embaúba Filmes confirmed to LABS that in August the film will be available for free on the Itaú Cultural website (itaucultural.org.br), the Brazilian not-for-profit cultural institute owned by Itaú Unibanco.

*Arabia*, 2017, Embaúba Filmes

### A testimony about Elena Ferrante's work

Elena Ferrante - *Uma Longa Experiência de Ausência* (or *Elena Ferrante - A Long Absence Experience*) is a new book by the Brazilian psychoanalyst Fabiane Secches. It brings a mixed story with academic study and testimony about her own emotional relationship with the writer’s work.

*Elena Ferrante - Uma Longa Experiência de Ausência*, 2020, Claraboia

### A taste of Brazil from the 70s

Aldir Blanc Mendes was a Brazilian author of chronicles and lyricist. He passed away on May 4th, at 73 years old, due to COVID-19. Blanc co-composed many songs with singers-songwriters in Brazil: Jequié (with Moacir Santos), Valhacouto (with Douglas Germano), Nação (recorded by Clara Nunes), Tem Boi na Linha (with Djavan) and Boca de Sapo (recorded by Clementina de Jesus). All available on YouTube.

*Aldir Blanc*, song collections, YouTube