Normalising Netflix: The Platforms, Practices, and Protocols of Internet-Distributed Television

By

Fairooz Samy

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Abstract

As the leading internet-distributed television platform (IDTVP) today, with over 200 million worldwide subscribers, Netflix is a fascinating case-study through which to unpack the strategies, innovations, and possibilities of internet-delivered television.

This thesis argues that Netflix appropriates existing broadcast and premium cable network practices to produce original programming while using internet-originated tools, such as big data and algorithms, to continuously improve its interface design. The thesis demonstrates how Netflix utilises internet discourses relating to television media, streaming, and technology, to contextualise subscribers' interactions with, and consumption of, content on its platform, discursively and practically creating the 'Netflix experience'.

The thesis examines the ways in which Netflix supports its commissioning strategies by continuously developing technology that emphasizes personalisation, choice, and temporal flexibility, all while promoting its digital capabilities through self-mythologizing narratives. As Netflix is constantly evolving in response to changes in the television industry (and is at times instigating these changes) this thesis includes industry discourse in the forms of press releases, advertising materials, and popular media journalism. Netflix's framing within popular media, both through its own promotional material and across industry press, simultaneously creates, reinforces, and normalises IDTV delivery and viewing protocols.

The thesis analyses Netflix's use of big data and algorithms to 'create value' for subscribers by enhancing the user-friendliness and personalisation capabilities of its platform, both of which increase viewer engagement with the Netflix interface. Also discussed are the company's strategies for value creation, such as continuous playback, the skip intro feature, the ability to download episodes automatically for offline viewing, and others, all of which incentivise temporally-flexible viewing habits, such as binge-watching. Additionally, the thesis investigates Netflix's exploitation of its big data caches to market its original programmes directly to subscribers, circulate biased viewing figures pertaining to content on its platform, and categorise its viewers into 'taste communities'.

Domestically, Netflix's role in the increasing consolidation of content owned by media conglomerates is discussed, notably Disney's 2019 acquisition of 20th Century Fox and its television holdings, and the subsequent effects of the deal on the licensing of Fox and Disney's intellectual property (IP). Netflix's upward trajectory in the United States illustrates the openings and opportunities available to the company in the time immediately before the IDTV model became widespread amongst (now) multi-platform broadcast and cable networks, thanks in part to Netflix's innovations in popularising IDTV protocols. The company took advantage of the US television industry's existing economic and industrial constraints to build a catalogue of acquired content. The resulting popularity of certain (high-end serial drama) programmes (particularly those licensed from cable networks) helped Netflix to establish a domestic subscriber base while forecasting the importance of IP ownership.

This thesis posits that the changes in the international regulation and provision of what is now an established form of television delivery demonstrate the influence that Netflix, as the largest purveyor of IDTV, has had in gaining entry into 190 countries over the past decade. As such, Netflix is an excellent representation of the international possibilities and successes of IDTV. The thesis also interrogates how Netflix's entry into original content commissioning has instigated broader changes in the legislation, commissioning, production, and reception of IDTVP in markets such as Brazil, The United Kingdom, India, South Africa, and its domestic market of the United States. Internationally, this research examines Netflix's investments in internet infrastructure and physical infrastructure, in terms of buying its own production hubs in places like Spain, its relationships with non-US networks, and the legislative response to the rapid growth of internationally-operating IDTVPs.

The thesis investigates how Netflix's willingness to outspend competitors and accrue debt allows it to build subscriber numbers, despite continuing to rely on acquired content, and increasingly, co-produced and directly commissioned content with (non-US) networks (Dunleavy 2020). It argues that Netflix is pursuing a commissioning and branding strategy of 'international localisation'. The strategy cultivates cultural specificity in the form of local language use, a story by a local writer-producer, the involvement of a local production company, and partnerships with local casts and crews. This cultural specificity is then combined with factors that allow local content to appeal to Netflix's international subscriber base, including accurately translated subtitling and dubbing in a variety of languages, as well as adopting aspects of high-end serial drama programming, such as large budgets, high production values, and creatively-risky or adult themes. The concept of international localisation is explored through the case studies of two Netflix-originated serial drama programmes, *Stranger Things* (US) and *Queen Sono* (South Africa).

Internet-delivered television is now a permanent fixture of the entertainment landscape. Multi-platform networks are the predominant group of television providers, with IDTV platforms constituting an ever-growing part of these networks' strategies. Increasing media company conglomeration is going to result in the consolidation of intellectual property rights for programmes among an oligopoly of parent companies, making content origination even more crucial for television providers. These conditions occurred alongside the rise of Netflix, a company which, little more than a decade prior, was primarily a DVD rental service, and now, in 2020, boasts availability in 190 countries. Netflix is not the 'global network' its CEO Reed Hastings claims it to be. However, its successes and challenges uniquely represent the seismic changes in the industrial, economic, and technological circumstances of the television industry over the past ten years.

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Contents

Introduction: The Netflix Gambit

> A lot of nominated shows this year are actually on Netflix. *House of Cards*. *Orange Is the New Black*. Enjoy it while it lasts, Netflix. Because you're not going to be feeling so smug in a couple of years when Snapchat is up here accepting Best Drama
>
> Amy Poehler 2015

> Everyone is watching Netflix. This show should just be me coming out, going, "Well done Netflix. You win everything. Good night."
>
> Ricky Gervais 2020

i. Opening Remarks

The above jokes were delivered by Amy Poehler and Ricky Gervais respectively during the opening monologue of the 2015 and 2020 Golden Globe awards. Poehler's light-hearted jab at Netflix's then-surprising critical and cultural success demonstrated two things. One was the entertainment industry's acknowledgement that internet-delivered television providers (IDTVPs) could become legitimate content creators. The other was the expectation that perhaps Netflix's momentum would slow. As referred to by Gervais, it has not.

In the United States, the year 2020 was characterised by the outbreak of the coronavirus pandemic, a contentious presidential election, an economic downturn, and the eruption of anti-racism protests. In need of respite from their turbulent socio-political conditions and confined to their homes due to self-isolation restrictions, Americans turned to television, peaking at an average of 40 hours of viewing per week in April of 2020 (Koblin 2020). Streaming television services in particular reaped the benefits of this captive audience, with streaming minutes over the March-April lockdown rising 85 percent compared to the same period in 2019 (Spangler 2020). These increases amplified a situation dubbed in US media as "the streaming wars" (Berman 2020). While such reporting is a hyperbolic simplification, the term “streaming wars” has become a commonly-used shorthand to refer to the competition for subscriptions, viewers, and profits between such leading American internet-delivered television providers (IDTVPs) as Disney +, Amazon Prime Video, Hulu, Peacock, HBO Max, and the instigator and current frontrunner in this particular ‘war’, Netflix. As of March 2021, Netflix holds 30 percent of IDTVP market share in the United States, 74 million subscribers, and ended 2020 with USD$10.4 billion in domestic revenues (San Juan 2021). Internationally, Netflix has demonstrated its cultural appeal with over 200 million global subscribers, as of March 2021. Its service is available in every country on earth except for China, North Korea, Syria, and Crimea (Netflix, 2021). In 2020, Netflix gained 37 million memberships worldwide and saw a profit of USD$25 billion, both of which are partly attributed to the confinements of the coronavirus pandemic (Netflix Shareholder Letter, Q4, 2021), the effects of which are discussed in the conclusion of this thesis.

Although statistics only provide snapshots of the context in which they were collected, Netflix’s figures are impressive enough to warrant further investigation of the company’s ever-widening international reach and the conditions in which this is occurring. The industrial, technological, and discursive processes through which Netflix has become the world’s dominant streaming service are the focus of this thesis. How is Netflix’s industrial success continuing to encourage an international paradigm shift towards internet-distributed television? What kinds of technological strategies has Netflix adopted and normalised? How do Netflix’s technological features contribute to the Netflix interface and influence the delivery and consumption of content on its portal? How has Netflix gained entry into various non-US markets, and what are the impacts of Netflix’s increasing presence in the production and commissioning sectors of both domestic (US) and international television industries? How is the ‘Netflix experience’ discursively created and what function does it serve in terms of Netflix’s decision-making and its public reception? To answer these questions, this television industries thesis will contribute a multifaceted examination of Netflix’s IDTV model between 2013-2020 to the fields of television and industry studies.

ii. Background

Netflix is an American-based over-the-top (OTT) streaming video-on-demand service (SVOD). Unlike other SVODs such as YouTube, Netflix is not a video sharing platform; it is an internet-delivered television provider and content creator. Netflix began in 1997 as a DVD rental subscription monthly service and debuted its streaming service in 2007. As with the 'premium' cable (or subscription-funded) networks and channels that existed before it, Netflix relies on monthly subscription payments rather than on revenue earned from advertising. Netflix's catalogue of content is delivered on-demand through its 'portal' or platform and is therefore 'non-linear', meaning it resides outside of a schedule. Whilst Netflix also originates programming, much of its offerings are acquired from other originators/owners, which are usually a combination of networks and production companies. The Netflix platform consists of an interface that allows subscribers to browse through a menu of content at their leisure, supplemented by a number of user-friendly features designed to simultaneously ensure flexible viewing and encourage active viewing behaviours. Such features include giving subscribers the ability to add content to a personalised 'list' for later viewing, to search for titles drawn from a huge cache of genre combinations, and to receive tailored recommendations based on similarities to what the user has previously watched.

Underpinning the platform is Netflix's use of algorithms to classify content and generate recommendations, and of 'big data', which it meticulously collects when individual viewers are using the service. The minutia of every click, every pause, every re-wind and fast-forward, and every search is recorded by Netflix. This big data is used to generate suggestions for viewers and provide Netflix with valuable statistical information about subscriber habits and preferences (Gomez and Uribe, 2015). In turn, these habits are used to inform and shape upgrades to the user-friendliness of the platform (such as options to skip the title sequence and the recaps provided for serialised narratives). The above data is used to assist and influence commissioning, renewal, and marketing decisions (Gomez and Uribe, 2015).

Partly as a result of the conveniences of its platform, Netflix has had an impact on the normalisation of the internet distribution of TV shows and the streaming of these by viewers. The nature of how consumers watch online television is an extension of an interconnected lifestyle that is hospitable to frequent interruptions through phone alerts, texts, social media notifications, and messages. It is therefore unsurprising that increasing numbers of people (especially younger adults) are paying for, and regularly using, SVOD services, and building habits and expectations around these platforms (Jenkins, 2014, Jenner, 2016). In the United States alone, 78 percent of households are using SVOD subscription services, a statistic that demonstrates the normalisation of preferences for advertiser-free, always-available, multi-episode television programmes (Prange 2020). One of the most significant contributions of IDTVPs has been the propensity for binge-watching content online. As the earliest and most popular purveyor of internet television, Netflix popularised the practice of binge-watching. According to Lothar Mikos, binge-watching has “no precise definition” but “occurs when a viewer watches two or more episodes of a series in one session” (2016, 157). Although binge- watching is not a new phenomenon, having originated in the late 1970s with the advent of the VHS, its relevance for the future lies in the increasing normalisation and popularisation of binge-watching behaviour. As de Campos Rezende and Boechat Gomide assert, “the [binge-able] series [is] not the end of television but it is appropriating the internet to create its entertainment and business models” (2017, 100). This thesis discusses the manner in which Netflix’s platform is capitalising on and propagating binge-watching practices, as well as how it is facilitating different practices of promoting, delivering, and consuming television programming.

IDTV offers new ways to anticipate how viewers might want to, or be able to, watch certain types of programming, and it provides the interfaces and services which respond directly to these kinds of preferences. Binge-watching is an active practice and its increasing popularity provides opportunities to map the changing ways in which consumers are experimenting with and curating their television viewing experiences. Internet platforms contribute to a public understanding of these shifting norms, uses, and expectations. Consequently, platforms also allow for an examination of the fluctuating relationships between viewers, interfaces, television content, and television providers.

Netflix's technological differentiation strategies (and its catalogue of acquired content) allowed it to gain traction in the domestic market and facilitate its primary focus of commissioning and owning its own original content. Although Netflix's move into content creation seemed inevitable when considering its 14-year upward trajectory, at the time of its first original commissions in 2013, Netflix's impact on the US television industry was difficult to predict. Like other cultural industries, television consists of "complex value chains where profit is extracted at key nodes in the chain through control of production investment and distribution" (Caves, cited in Garnham, 2005, 20). Netflix's business has extended to the licensing of exhibition rights and the striking of various types of production deals, while operating within the territorial considerations which are part of the television industry's value chain and which remain necessary for how content is bought, sold, distributed, and consumed. In the early 2010s, broadcasters and cable networks tried to maintain their market share and minimise the entry of Netflix and its contemporaries by using their positions to create false bottlenecks. One such tactic was through windowing and copyrights, which involve the release of content across various portals for limited periods of time (Gonçalves, Evens, Alves, Pimenta, and Ballon, 2014). However, broadcast and cable networks have both learned from Netflix's internet-based streaming strategies and implemented several of its approaches for their own standalone or catch-up internet-delivery portals.

A notable example of an industry incumbent learning from Netflix's roadmap is media behemoth, Disney. In 2014, Netflix and Disney struck an agreement that gave Netflix exclusive American streaming rights for all Disney films and the option to co-produce original shows with the Disney-owned Marvel Studios (Grauso, 2016). Netflix and Marvel created a series of Netflix originals surrounding the comic book characters in *The Defenders* and, as of early 2018, had six different series available on the platform. In 2017, Disney announced that it was withdrawing its content from Netflix so as to create its own streaming service, stocked with the vast back catalogue of Disney-owned properties (Grauso, 2017). Netflix retains the rights to continue its Marvel collaboration, which has proved successful for Marvel (and by extension for Disney). In that respect, the positive and negative publicity around the Marvel shows, and the landmark deal that resulted in their creation, helped to boost Netflix's stock price and its reputation as an innovative risk-taker (Steinberg, 2013). Disney was able to consolidate the range of outlets through which its back catalogue could be viewed (removing its films from Amazon Prime and Starz in the process) and gain a cohesive picture of internet-streaming 'best practices' that it can now use for its own subscription-based platform. These 'best practices' have since proven to be invaluable, with Disney announcing its purchase of the entertainment division of Fox for $52 billion in December 2017 (VanDerWerff, 2017). With this acquisition, Disney owns a 60 percent controlling share in Netflix's US-domiciled rival Hulu.

The deal's huge implications continue to have consequences some three years later. Disney now owns 20th Century Fox Films and the Fox broadcast network as well as Fox's now-premium cable sister network FX. Both are home to a plethora of commercially prosperous and widely-viewed shows, like the long-running *The Simpsons* and *Family Guy*, and older shows that earn Fox revenue in secondary markets, such as *The X-Files*, *New Girl*, and *Glee*. Disney now has control over where these programmes and films can be watched and to whom they can be sold. This development, occurring in tandem with the subsequent international launch of HBO MAX, has reduced Netflix's buying power and licensing options. Furthermore, Disney now owns all of 20th Century Fox's franchise licenses, including popular franchises like the *X-Men*, *Alien*, and *Planet of the Apes*. These changes mean that the film industry is likely to experience an uncertain amount of unrest as a direct result of the disruptions in the television industry (Vanderwerff, 2017). Such negotiations show that existing power structures and protocols for how television shows are financed, produced, distributed, and sold, are undergoing fluctuations as a result of how effectively Netflix has used digital strategies to manoeuvre itself into the existing market. Netflix not only built upon the economic and creative strategies introduced by premium cable channels in respect of their original productions, but it also capitalised on its position as a platform that operates outside of both established national regulations (such as the Federal Communications Commission in the US) and advertiser-funded television (Trujillo 2016).

In this work, Netflix is referred to as a streamer, a company, a network, and an IDTVP, each of which reflect the multiplicity inherent in the discursive concept that is the 'Netflix experience'. The idea of the Netflix experience is a substitute for the company's brand identity. The commissioning requirements of broadcast and cable networks greatly influenced their network identities. Even the largest internationally-operating IDTVPs, such as Disney + and Amazon Prime Video, have commissioning requirements and network identities informed by the pre-existing commercial imperatives of their parent companies (in this case the Walt Disney Company and Amazon, respectively) that have diversified (and more lucrative) revenue streams outside of their IDTV services. Having begun as a provider of solely acquired content, Netflix sought to cultivate distinction through the structure and characteristics of its portal and the technological features which enabled the personalisation, recommendation, and user-friendly capabilities of its interface. These components make up the 'experience' of consuming content on the Netflix platform, encompassing everything from easy searchability, an appealing homepage layout, the ability to download content for offline viewing, and the option to skip title sequences.

Netflix is simultaneously a software company, a television distributor, and a commissioning network. Consequently, it is able to amplify each function depending on what aspect of the 'Netflix experience' it wishes to promote. The flexibility of this positioning reflects the competing demands on Netflix's IDTV model. It is both local and international. It is a commissioning network with its own exclusive original programmes yet must offer and maintain an enticing catalogue of acquired content. It is required to perform seamlessly in well-connected markets with widespread access to high-speed internet, yet accessible in markets with low-speed bandwidth and limited internet infrastructures. Its recommendations are simultaneously personalised and aggregated, based on minute individual user data and the combined meta-data of millions of users. It provides specificity and variety, offering subscribers options for active or passive control over searching and viewing. Netflix's self-identification as "the world's biggest fans of entertainment" leaves room for subscribers to make their own assessments about the company as to which of its various features provide them with sufficient value to justify maintaining their subscriptions (Netflix, 2021).

Netflix's lack of a discernible network identity has allowed its IDTV model to become ubiquitous as *the* normative IDTV model, at least in the popular consciousness of the public and news media. Netflix did not create the industrial conditions that permitted it this degree of brand flexibility, but it was among the first to capitalise on them in ways that demonstrated the viability of the IDTVP model. It is for these reasons that Netflix is at the centre of this research. The company's growth over the past decade has provided some of the most expensive, influential, and publicised events in recent television industry history. Netflix is continuing to have a normalising effect on IDTV viewing practices, as well as on the delivery and promotion of programmes on IDTV platforms. It provides an ongoing litmus test for the types of approaches, trials, and prospects that IDTVPs are currently encountering and will continue to encounter. Netflix's impacts on the international industries in which it operates (and their regulatory and economic responses) are instigating discussions that will inform academic research into television and its industries for the foreseeable future.

iii. Framework and Methodology

Over the past decade, scholars began to more seriously address the repercussions that SVOD providers and internet television have introduced to the television medium. While video streaming existed prior to that, the last ten years have seen a marked increase in the technological capability to stream high-resolution television content with fast bandwidth (Lobato, 2017). In response to the increasingly entwined relationship between SVOD platforms and the institutional, economic, and cultural characteristics of television industries, this thesis uses a textual analysis and qualitative content analysis approach that is rooted in a media studies framework, television scholarship, and television industry discourse, to establish a well-rounded picture of the institutional, creative, and audience responses to internet-distributed television, using Netflix as a case study.

As this thesis investigates Netflix's influence over internet-distribution as a model of television delivery and consumption, it draws heavily on the work of Amanda Lotz (2016, 2018, 2020). Although the earlier chapters of this thesis present a comprehensive analysis of Netflix's technological strategies, the recurring argument throughout the text as a whole is the importance of assessing the streamer's contributions within the context of the industrial shifts that have occurred in contemporary television production, many of which have impacted IDTV, and vice-versa. Lotz's work (2016, 2018, 2020) which suggests that SVOD research can instigate a historicised and industry-focused academic methodology to both non-linear delivery and IDTV, is used to inform this thesis' approach. Lotz applies Lynn Spigel's definition of television as "technologies, industrial formations, government policies, and practices of looking" to an internet-distributed television context, examining the multiplicity of factors informing the "protocols of TV" – socially, economically, and technologically (Lotz, 2016, 124). The television schedule, a product of the linear delivery model, rendered timeliness a "structuring norm of television engagement", a norm which is being challenged by the possibilities of two key characteristics of IDTV, these being non-linear delivery and temporal control (Lotz, 2016, 118). The questions which this thesis seeks to answer involve the various protocols of IDTV delivery and consumption which Netflix originated, appropriated, or was instrumental in popularising, building on the "multiplicity of norms" that Lotz's work established (2016, 127).

In addition to Lotz's work, the thesis uses the invaluable contributions of scholars such as Trisha Dunleavy (2020) and Ramon Lobato (2018, 2020). As this work unpacks the impacts of Netflix's increasing presence on the production and commissioning sectors of both domestic (US) and international television industries, it draws on Lobato's research (2018, 2020) which is immensely helpful for understanding the international scope of Netflix's digital distribution infrastructure and the policy challenges that it encounters in non-US markets. Dunleavy's publications identify new strategies for the transnational and cross-platform commissioning of high-end drama that is occurring between "non-US broadcasters and US-based premium networks" (2020). Her research is particularly informative to the later chapters of this work, as they assess Netflix's entry into non-US territories and the commissioning strategies it employs to cultivate footholds in markets with English and non-English-speaking populations. The company's ability to become 'worldwide' is a key investigative theme, especially as it pertains to the methods the streamer utilizes to commission original local content from countries with different languages and storytelling traditions for its vast international subscriber base. For assistance in contextualizing the scope of Netflix's reach, Mareike Jenner's work (2016, 2018) is highly useful to this thesis' framing of the company as an international content originator, a technological disrupter, and an industrial influencer, within the larger context of the dynamic changes occurring in international television industries.

The thesis explores the construction of the 'Netflix experience' as an exemplar of Lotz's assertion that "portal viewing differs as a cultural experience from previous norms" (Lotz, 2017, 49). Drawing on the work of Catherine Johnson (2012, 2013, 2017), Alexander Dhoest and Nele Simons (2016), and Jane Roscoe (2016), this thesis discuss how the Netflix experience uses industrial and cultural cues to distinguish the company as a network, in lieu of a distinctive brand identity (Johnson, 2012, 2013, 2017). The versatility of the Netflix experience as a tool of prestige, relatability, specificity, and generality, is discussed throughout this thesis as one of the streamer's strategies for market integration, interface design, and programme commissioning. Johnson's work is particularly helpful for defining the importance of network self-mythologising and 'experientiality'. She argues that network branding is "not simply a logo or set of values" but rather it entails "a set of relations between producers, writers, networks, texts, and viewers" that speak to the significance of understanding television as an 'experience' that transcends any one industrial, generic, or technological denotation (2007, 27). As this thesis contends, Netflix's pioneering IDTV model provides a space in which to explore how internet delivery affects the "possibilities of programming, software and algorithms in ways that shape and construct the experience of television online" from a television studies perspective that factors in the unique temporal conditions that prompt discussion in current academic television discourse (Johnson, 2017, 123). In order to identify the themes that constitute the Netflix experience, this thesis takes a textual analysis approach to evaluate responses to the company's actions from news media and industry press outlets and examine the promotional material that Netflix itself releases. Such material functions as a way to chart the company's evolution with regards to its commissioning goals, its relationships with partners in the industry, and its strategies for international expansion. Taken together, these outcomes construct the Netflix experience that this thesis subsequently interrogates and critiques.

iv. Thesis Structure and Chapter Overviews

Television cannot be assigned a singular stable 'identity' because of its changing relationships with "industrial practices", "audience behaviours", and "cultural understanding", all of which contribute to the definition of the medium of television (Lotz, 2017, 8). In recognition that television is, as Mike Van Esler writes, a "concept rather than an object of technology", each of the five chapters in this thesis focuses on a central facet of IDTV (2016, 133). Chapters One and Two centre their discussions of Netflix around its technological considerations. Chapters Three and Four examine Netflix in relation to the industrial conditions of the television industries in its domestic market and various international markets. Chapter Five uses Netflix-commissioned series as case studies to explore the company's commissioning objectives with regards to high-end serial drama programming.

Chapter One establishes Netflix's use of big data and algorithms and describes the technological processes that enable Netflix's internet-based operation. The chapter explains platforms and their role in facilitating digital communication and describes how portals and platforms enable multi-device capability and consequently, entail temporal and physical control. It argues that Netflix's wielding of platforms, both technically and rhetorically, creates the idea of a 'Netflix experience' that is differentiated from linear television because of the opportunities for control and personalisation afforded by the use of the platform. The chapter investigates the technological strategies used by Netflix to localise its content for international viewers, as well as Netflix's efforts to standardize content and interface localisation by means of its international digital infrastructure, through the Netflix Post Partner Programme (NP3), all of which inform the discussions in Chapter Five. Chapter One also introduces Netflix's rhetorical strategies and the channels through which they are disseminated, these being the Netflix Tech Blog and the Netflix Medica Centre, which are referenced throughout the thesis.

While Chapter One focuses on the rhetorical framing of Netflix's technological affordances, Chapter Two extends the framing to include the *outputs* of these affordances, such as the practices of binge-watching, the production of self-calculated ratings, and the categorisation of subscribers into taste-communities. Chapter Two extends the established discussion of Netflix's technical architecture and its most prominent portal features to contextualise the company's interactions with its subscribers and the reception of its content. It introduces Netflix's social media presence, accounts, and strategies as sites of discursive creation, which benefit from user engagement to generate attention, cultural saliency, and IDTVP differentiation. This chapter delves into Netflix's strategies for viewer categorisation and assesses the its influence on ratings within the wider context of existing audience measurement tools and the industry's inability to verify Netflix's metrics. Chapters One and Two lay the groundwork for the ways in which the company uses its technology (and the narrative around its technology) to build cultural capital and self-mythologise.

Chapter Three unpacks Netflix's trajectory in the US through its key relationships with other American networks, internet service providers, and writer-creators. The chapter also discusses the industrial conditions that allowed Netflix to acquire some of its most-viewed programming and the strategies that it uses to commission original American shows. Chapter Three establishes the legislative and industrial practices that have governed the American telecommunications and television industries. It explains how Netflix, as an internet company, was able to exploit the loopholes in these practices which had not accounted for IDTV-only providers of television. The chapter explores Netflix's relationships with the providers of its content (broadcast and cable networks) to contextualise the opportunities that were available to it in the short but crucial period before the widespread adoption of IDTV platforms. It explores Netflix's reliance on acquired programmes, and the industrial conditions that enable the company to build and maintain its domestic subscriber base, largely thanks to the popularity of these acquired serial programmes. The chapter discusses the advantages and downsides of the cost-plus funding model in relation to the Netflix's commissioning and cancellation decisions. It also identifies the continuation of the 'Netflix experience' narrative throughout the company's public communications and establishes the tactics that Netflix employs and modifies in its pursuit of foreign-language commissioning, discussed in the following chapter.

Chapter Four examines Netflix's strategies for operation in various international markets, including The United Kingdom, Brazil, and India, with a particular focus on the company's recent expansion into the Sub-Saharan African (SSA) and Middle-East and North-Africa (MENA) countries of South Africa, Nigeria, and Saudi Arabia. It studies how Netflix's tactics regarding its technologies, its infrastructure, and its commissioning (established over Chapters One-Three) perform in markets outside of the US. The chapter discusses the limitations and successes of Netflix's approaches, depending on variables such as internet availability, linguistic diversity, other television networks in the region, and regulatory oversight. Chapter Four lays the foundation for Netflix's foreign-language commissioning choices and its goals for its non-US output, both of which are explored in Chapter Five. It also analyses some of the vulnerabilities in Netflix's international operation, such as cyber threats and infrastructural blockages which may compromise the delivery of its service.

Chapter Five focuses specifically on Netflix's original content. It examines how Netflix's approach to localisation affects the company's commissioning decisions in two indicative territories. The chapter discusses the IDTVP's physical expansions into non-US territories and its increasing focus on acquiring its own production facilities and working more closely with (non-domestic) local production houses to commission more non-English-language programming. Additionally, the chapter expands on Netflix's commissioning strategies, which include seeking out less experienced writer-producers and sourcing local pitches that include diverse gendered, racial, or cultural narratives. The chapter uses two Netflix original programme case studies to explore these strategies and Netflix's objectives with regards to its brand of 'internationally local' content. The first is *Queen Sono*, a spy drama and Netflix's first African original programme. The second case study is *Stranger Things*, an American science fiction horror drama. Both programmes are flagship Netflix originals in their respective markets. Each represents the culmination of Netflix's decision-making with regards to its 'internationally local' content strategy (discussed in Chapters Three and Four) and both dramas reflect the company's competitive advantage as an American company that delivers and creates original programming outside of the US.

The final thesis chapter is the conclusion. It demonstrates the thesis' contributions to television studies scholarship and the ways in which it has provided a comprehensive analysis of Netflix's platform and its disruptive influence by historicising (and modernising) the discourses and practices of television production, delivery, and reception for the IDTV climate. It addresses why Netflix's technological and industrial strategies, which began as innovations that capitalised on the opportunities created by convergence, digitalisation, and globalisation, have become normalised, and adopted by existing broadcast, satellite, cable and IDTVP networks. The conclusion reflects on the conditions and decisions that enabled Netflix's trajectory from DVD rental mail provider, to domestically dominant streaming service, to internationally-operating content originator. It answers the questions of how Netflix became socially ubiquitous as an IDTV titan, and why the Netflix experience is a cultural standard for IDTV viewers. The conclusion also considers possible limitations in this research and suggests areas for further study.

This thesis establishes Netflix's normalisation by summarising the company's cultural and industrial legacy over the past seven years (2013-2020) and highlighting its contributions to the evolving and resilient sector of IDTV. It does so by considering Netflix's use of internet technologies in the form of algorithms, big data, and worldwide digital infrastructures, to facilitate the delivery of video streaming through a user-friendly interface that is both standardised and personalised. The thesis unpacks the ways in which Netflix frames its IDTV model as ubiquitous by employing the rhetoric of the Netflix experience. The company's data-driven affordances, such as its audience categorisation methods, tailored recommendations, and viewing figures, are challenged and situated within the wider contexts of Netflix's programme origination and its reliance on acquired content. This research project examines the differences in Netflix's operational and commissioning tactics across various international markets as well as its domestic market of the United States. Additionally, it investigates the evolution of Netflix's non-US commissioning strategies and identifies the network's trend towards 'internationally local' programming. Discussing the advantages and disadvantages of these strategies for Netflix and its non-US production partners and subscribers allows this thesis to analyse the creative outputs of the 'internationally local' approach in the form of Netflix original shows. The following chapter investigates the characteristics of Netflix's platform, and introduces the themes and approaches that exemplify the IDTVP's operation in the United States and abroad.

Chapter One: Platforms, Data, and Algorithms

1.1 Introduction

Big data and algorithms, enabled by the internet, convergence, and digitalisation, are facilitating the growth of a branch of television distribution and reception which Amanda Lotz calls "internet-distributed television" (IDTV) (2018). IDTV is growing and travelling across the globe, with Netflix alone accruing over 200 million international subscribers (Alexander 2021). Most existing broadcast, cable, and satellite television networks (B/C/S networks) now offer their own standalone IDTV platforms in some capacity. In the United States, HBO launched its own streaming service HBO Now in 2015 while broadcaster CBS launched Paramount +, its first on-demand platform, in 2017, followed by services like Disney + and NBC's Peacock in 2019 and 2020 respectively, as well as the replacement of HBO's Now and Go apps with the rebranded 'HBO Max' standalone streaming service (HBO News 2020). Even early broadcast network adopters of on-demand internet platforms, such as Channel 4 (4OD, 2006) and the BBC (iPlayer, 2007), are improving their services based on the technical protocols established by Netflix (BBC News 2007, Channel 4 News 2010). These examples show that new digital media, including internet-connected media and networked media, have neither overtaken existing B/C/S networks nor destroyed the economic structures that enabled their dominance. However, while Netflix cannot take all the credit for the television industry's increasing use of internet delivery, its existence within, and responses to, the industrial, commercial, and technological undertakings of the industry (as this chapter explores) provide a way to understand the company's contributions to IDTV.

This chapter discusses the ways in which Netflix produces a popular idea of IDTV that has become synonymous with the experience of using the Netflix platform. Of note is the rhetoric around the creation of what this thesis terms the 'Netflix experience', which refers to technological and rhetorical strategies employed by the company as mechanisms for distinction and differentiation. Two of Netflix's most important differentiation tools are data and algorithms, both of which are a widespread part of daily digital life. As a result, scholars have increasingly begun to recognise the significance of internet-based technologies in industries like television. This recognition includes the ‘experientiality’ afforded by the user-engagement properties of the internet and the impact that software is having on the practices of consuming televisual content. Lisa Gitelman writes that the “data of culture” provides “new sites for the ongoing and vernacular experience[s] of representation” (2006, 4). Scholars like Gitelman emphasize the value of including the ‘experience’ of digital media technologies and its uses, within academic scholarship. This chapter both utilises, and contributes to, the “vernacular experience of representing” Netflix’s norms of IDTV consumption by drawing upon its descriptions in the press and throughout the company’s own media presence. Catherine Johnson describes the role that branding plays in defining the experience that television networks would *prefer* their viewers to have, and what those preferences (and the strategies used to achieve them) relay about the production of taste hierarchies between different types of content providers (2012, 2017). Lotz discusses the need to understand what the “experience of the portal”, and its non-linear attributes, contribute to the future of television production (2016, 138). This chapter builds on academic interpretations of experientiality by examining the rhetorical construction of the ‘Netflix experience’ in popular media, news articles, and social media. It argues that Netflix has participated in the discursive creation of IDTV by framing technological novelty and algorithmic personalisation as central to the function and experience of internet television.

The chapter begins with an explanation of platforms and their role in facilitating digital communication, followed by an exploration of algorithms, big data, and their background within television studies. A discussion of rhetorical strategies clarifies the ways in which Netflix employs pro-internet discourse in its own self-mythologizing. Next, the Netflix interface’s user-friendliness is examined in relation to the portal’s reliance on data and algorithms. User-friendliness demonstrates how Netflix uses internet technologies to create value for viewers by providing options for user-control and personalisation, both of which manufacture intuitiveness. User-friendliness stems from, and encourages, more physical interaction with the Netflix portal. The more viewers interact with the interface, the more data it gathers, which the streamer uses to improve its recommendation algorithms. This feedback loop allows Netflix to maximise its technological advantage over B/C/S networks and grow its public narrative of technological novelty. An examination of Netflix's software architecture follows, using the company's three main official communication channels to explore how it claims to use algorithms to facilitate innovation through direct marketing to viewers, creating personalised album artwork for programmes, and enabling time-shifted viewing habits. The first of these communication outlets is the Netflix Media Centre (NMC) which posts press releases and acts as a jumping-off site for Netflix's two other official online hubs; the Netflix tech Blog (NTB) and the Netflix Research Centre (NRC). The NTB provides in-depth explanations of the company's software architecture, data use, and algorithms, written by the company's software engineers. The NRC provides packaged marketing targeted towards professionals, outlining Netflix's expertise across analytics and machine learning platforms and directing users towards job opportunities within the company. Material from each of these outlets will be used throughout this thesis. The chapter concludes by looking at Netflix's production requirements for its digital partners. It argues that Netflix's production guidelines, and the programmes it has established to facilitate them, illustrate the company's strategy of crafting a 'Netflix experience' that is distinguishable within the industry (post-production professionals) and outside of it (viewers and subscribers). This section also demonstrates the way that Netflix uses technology as part of its 'localisation as internationalisation' strategy.

1.2 Platforms

Internet platforms have become a buzzword for cultural critics, standing in as a synonym for 'streaming media content'. In this discourse, a platform is an internet intermediary that provides access to and from an entity (usually a business) and a user (usually a consumer). Platform theory emerged from the study of internet technologies. Unlike physical platforms, internet platforms are facilitators, directing transactional flows between users, companies, and content. While broadcast, cable, and satellite television provide users access to pre-selected content within a set schedule (and provides advertisers access to consumers) IDTV platforms provide similar access to users without the same temporal conditions. Included in the category of platforms (or "portals" as they are referred to by Lotz, 2017) are interfaces. An interface is the digital (or physical) apparatus that enables communication and functionality between the user and the platform's software (Evens and Donders, 2018, 71).

As Gitelman notes, protocols emerge in relation to new technologies (2006). In the case of IDTV, the distribution technology of the internet brought with it existing protocols around the practical accessibility of media over the internet (the interface, streaming, bandwidth) and its ideological function. Although acquired and commissioned content remain the key drivers of competition and consumption in the television industry, one of Netflix's main points of differentiation is its interface. Behind the company's rhetoric of personalisation and the idea of the 'Netflix experience', are the conveniences of the platform and the protocols that accompany its interface. Netflix's popularisation of subscription-funded IDTV represents how "the experience of TV viewing increasingly encompasses search, browsing and recommendations provided through interfaces" (Johnson 2017, 130).

Platforms and consumers have a symbiotic relationship, with scholars and writers arguing that consumers now expect the same conveniences that on-demand services offer across all of their telecommunications, media, and entertainment (TME) systems (Arsenhault 2017, Tryon 2013, Christian 2012). This "AWATAD attitude" (anywhere, anytime, any device) reflects the normalising effect that IDTV has had on television delivery protocols and the importance of the Netflix model to its international profile and success (Gimpel 2015). The Netflix platform is an exercise in value creation. Viewers who prefer convenience in their media consumption can supplement their viewing habits through the platform. The emphasis on the convenience as a key part of the appeal of the 'Netflix experience' reflects an internet-originated engagement strategy that Netflix appropriated and adapted for its IDTV service. The streamer borrowed the subscriber model from premium cable networks such as HBO and added internet-created practices to produce a highly user-friendly platform optimised for video streaming. Netflix's portal and interface keep the viewer engaged in a personalised digital environment. Working together, these features encourage users to take active control over their watching experience and enables them to create a televisual stream that suits their individual preferences.

The “advertising and promotional discourse” around IDTV tends to focus on three main themes: spatial mobility, temporal mobility, and personalisation (Tryon, 2013, 29). Importantly, these themes are related specifically to the digital *delivery* of media content – the platform or portal – and not the content itself. The company encourages mobile viewing behaviours by normalising the idea that viewing experiences can be constant and seamless, moving from room to room and device to device to complement subscribers’ daily routines. A consumer can stream Netflix content over a laptop at home, play the same content on their smartphones at work or outside the house, and then stream Netflix over their television when they return. There are macro and micro levels to these options, the macro being the convenience of spatial and temporal mobility and the micro being the opportunities for personalisation offered via the portal. Furthermore, the platforms on which media is streamed are also portable, so content can not only be transferred seamlessly between television screens, laptop screens, iPad screens, and cell phone screens, but several of these devices can be transported from room to room, and in some cases, location to location. Despite the possibility of constant connection, practical factors continue to limit the functionality of platform mobility. Data limits, charging requirements, video quality, and internet access are technological and institutional constraints that counteract the ‘anywhere/anytime’ narrative popularised by Netflix.

The capabilities of IDTV platforms allow – and encourage – a broad range of viewing experiences, providing viewers with a multitude of streaming combinations to best facilitate their preferences. Such opportunities have led to scholars like Chuck Tryon arguing that IDTV has led to a “casualization” of viewing practices, which refers to viewing according to a “personal schedule rather than in the discreet time frames suggested by broadcast schedules” (2013, 60). Netflix contributes to casualization in various ways. It has made available entire seasons of its original programmes at once, which allows casual viewers to stream a show continuously in the background as they perform other tasks. If they prefer an invested experience, they can stream content directly to a television or laptop, pausing and rewinding at their discretion and watching as many episodes as are available. Netflix subscribers may also return to any partially watched episode and resume viewing from the moment they exited the episode. Its auto play feature automatically plays the next episode of a series five seconds into the credits of the completed episode, with limited viewer intervention which comes in the form of an ‘are you still watching?’ notification that requires viewers to confirm within a two-minute time limit (Netflix Help Centre 2020). The company justifies this engagement as necessary for the protection of subscribers’ other conveniences, explaining that it “does this to make sure you don't lose your place or consume unnecessary internet data if you’re not actually watching” (Netflix Help Centre 2020). The explanation demonstrates Netflix’s self-awareness around the amenities and downsides of digital streaming and its solutions for ameliorating them.

The importance of the interface is crucial in understanding Netflix’s popularity. The proliferation of devices that enable media mobility gives internet creators an opportunity to generate user-friendly platforms with interfaces that feel intuitive, rewarding, and functional. As an internet television distributor, Netflix recognized that its capacity for differentiation lay firstly in its harnessing of the efficiency-capabilities of the internet as a delivery platform, and secondly in its exploitation of those capabilities over original and acquired content. In being able to provide what was a unique viewing experience for much of its first decade as an IDTV pioneer, Netflix saw the opportunity to re-frame existing norms and facilitate new ones that would be key contributors to its brand distinction, industrial differentiation and overall success. Netflix’s rhetorical strategy is thus twofold. It’s platform and interface are technologically innovative because of their application of algorithms and big data, and they are conceptually innovative because of the cultural saturation of the company and its reputation of providing the quintessential internet television experience.

1.3 Algorithms and Data

Netflix's use of data exemplifies what van Dijck and Poell call the "datafication" of modern life, or the "ability of networked platforms to render into data many aspects of the world that have never been quantified before" (2013, 9). The term 'big data' was coined by computer scientist John Mashey in 1998, but as scholars like Manovich (2002, 2012, 2019) and boyd and Crawford (2012) note, the phrase is something of a misnomer. In its first iterations, it referred to enormous volumes of information that could only be collected through the use of supercomputers, thus limiting their scope, analysis, and applications (Kitchin and McArdle 2016). Today, big data still describes the collation of huge quantities of digitally available material but includes within its definition the availability of data through the proliferation of internet software and the hardware that enables it, such as computers and smartphones. The resulting digital media ventures, ranging from social media networks to online banking to email services, have made billions of internet-enabled actions visible and calculable, thus necessitating the distinction between 'data' and 'big data'. Yet, fundamentally, big data is "less about data that is big than it is about a capacity to search, aggregate, and cross-reference large data sets" (boyd and Crawford, 2012, 663).

The gathering and usage of big data is now commonplace among internet-based companies. Despite the popular association between data and billion-dollar tech businesses like Google, Amazon, and Facebook, the use of big data has become widespread across the economic spectrum. In the United States alone, 53 per cent of all publicly traded companies were using big data analytics in 2017, up 17 percent from 2015 (Columbus, *Forbes*, 2017). Media outlets have been no exception to the hype. In 2016, *New Republic* magazine declared it the "Age of Algorithms", calling data the "organizing principle" of the 2010s (Alang 2016). In 2017, the Pew Research Centre, a yardstick of the American socio-political climate, released an 86-page report that asked if society was "code-dependent" (Pew Research Centre, 2017). *The Guardian* warned readers that "data will change the world and we must get its governance right" (Zeichner, 2017) and then-President Obama's administration released its own report about data and algorithms, with plans to offset its effect on the American economy (Pew, 2017). Big data, and the algorithms used to accumulate and interpret it, have become trusted sense-making tools that reflect the cultural and consumerist tastes of billions of worldwide users.

Algorithms can be simply described as equations that use data to solve the questions their writer is asking. Although algorithms are technically lines of code carrying out an organizational software task, they are simultaneously instruments of classificatory influence that reflect, and produce, social meaning. As Beer explains, algorithms are “inevitably modelled on visions of the social world, and with outcomes in mind, outcomes influenced by commercial or other interests and agendas” (2017, 5). Their mathematical basis affords algorithms a supposed motivational neutrality, yet the purposes for which they were designed, and the interpretations of their results, are still beholden to human subjectivity. As Netflix has used them, they are based on a set of ‘rules’ about how to define taste, genre, and identity. Entities with the most wealth are able to create the most seamless, seemingly intuitive algorithms, which increases the number of people using their service or consuming their content, making their platforms more accessible. The most effective algorithms become the most commonly used, thus popularising that entity’s content, perpetuating its version of taste and culture, and importantly, defining the experience users have with that cultural product. This contributes to a system which, by its own design, is constantly affirming its own determinability, creating an “algorithmic culture” that considers such processes normal. Data scholars Hallinan and Striphas define ‘algorithmic culture’ as:

> The use of computational processes to sort, classify, and hierarchize people, places, objects, and ideas, and also the habits of thought, conduct, and expression that arise in relationship to those processes (2015, 119).

Algorithmic culture – which is dependent on big data – encourages, participates in, and occasionally challenges the procedures through which content is created and received. The popularity of IDTV services and SVOD providers such as Netflix have brought algorithms into the purview of television studies because of their importance in the design and function of the IDTV interface and its ability to provide a personalised user experience through recommendations and suggestions (Wark 2011, Manovich 2014, Lycett 2013, Wade-Morris 2016, Barnes 2017). The dual function of algorithms is well-illustrated in their IDTV application.

As such, scholars like David Beer (2017), Tarleton Gillespie (2014), and John Chenney-Lippold (2011) have argued that algorithms, and their counterpart big data, require a Humanities focus to “unpack the warm human and institutional choices that lie behind these cold mechanisms” (Gillespie, 2014, 3). Situating algorithms within the social sciences allows scholars to examine the idea that algorithms obfuscate the logic that leads to their social outputs, that we are living in a “black box society” wherein personal data is collected and monetized using algorithmic technology whose “values and prerogatives are…. hidden in a black box” (Pasquale, 2015, 8). The study of Netflix can bridge the gap between the internet-focused approach to portals and television studies, particularly because the company’s international presence over the past decade has made the concept of IDTV a media mainstay.

As a primary distributor and commissioner of IDTV content, Netflix demonstrates the enduring conundrum of data politics. The acquisition of data leads to a dearth of information about user preferences. The information leads to more user-friendliness and better recommendation software, which in turn, prompts the removal of individual agency and labour. This phenomenon has been termed “corrupt personalisation” by Christian Sandvig who argues that algorithms serve a neoliberal capitalist purpose that leverages the accuracy of data against business interests, thereby legitimising normative tastes (Sandvig 2014). Corrupt personalisation is similar to the idea of “mutual domestication” that describes the cyclical relationship between algorithms, platforms, and users (Siles, Espinoza, Rojas, Naranjo, and Tristan 2019). Mutual domestication refers to the processes through which “users incorporate algorithmic recommendations into everyday life as much as the platform works to colonize users and turn them into ideal consumers through its algorithms” (Siles et al, 2019, 2).

All data, including Netflix's extensive cache, has been gathered with hegemonic commercial incentives in mind. Because of this core problem, big data is "inherently conservative"; it deals with "what is rather than what should be", and thus has a greater potential to sustain current power structures than it does to undermine them (Barnes, 2013, 300). These structures include commercial structures, like the ability to gate-keep and consolidate power afforded to companies with the highest number of financial assets, as well as socio-cultural structures, like normative methods of conceptualising audiences. Even scholars who dispute the industrial impact of big data concede its socio-cultural influence, with Amelia Arsenhault cautioning that big data "does not necessarily represent a paradigm shift in how media is organized and produced" but is "an attempt to normalize the convergence of new and old media networks…it is both an agent and consequence of the globalisation of media flows" (2017, 19-20). Big data, while consequential, is never objective, and Netflix's commercial imperatives affect its use and interpretation of data at every level.

Consequently, the gathering and deployment of data has garnered academic attention because of its organizing influence over international television industries on a macro level. The increasing use of big data also creates a space for the intersection of information studies and television studies, asking how the televisual paradigm has incorporated this technological development and its contributions to conversations about televisual practices, as well as what data monitoring can confirm about changing audience habits. Data provides networks with the opportunity to quantify variables that were previously undefined, such as viewer attention spans and retention rates. It gives network owners the ability to be discerning in more accurate ways than ever before, grouping viewers together according to whatever combinations are deemed most useful and profitable, such as Netflix's 'taste communities'. The content created for these newly-identified audiences – or increasingly, users and subscribers – then becomes part of the tapestry of other cultural products and thus influences genre, appeal, and popularity. Algorithmic culture makes customer satisfaction the primary motivator for cultural creation because its logic dictates that increased satisfaction leads to retained interest, popularity, and commercial reward. When shows and films are assigned ratings, they are recommended to a viewer based on a barometer of that viewer's individual taste weighed against the aesthetic judgments of the other viewers using the service. The standards by which a series is considered 'valuable' or ascribed specific artistic qualities (dramatic, exciting, romantic, funny, and so on) become less about using normative cultural frameworks than they do about using increasingly subjective and interrelated frameworks. Galloway (2011), Arsenhault (2017), and Srnicek (2017) argue that this process dilutes existing cultural standards in a manner that neither challenges the norms or the audience that sustains them.

The centrality of algorithmic culture to IDTV purveyors like Netflix also implicates the continuing importance of the categorization of viewers in the televisual process (Havens 2014). Challenging existing notions of active viewership also helps to trouble pro-technology biases in popular journalism. Because data and algorithms are based on mathematical theory, they carry a preconception of 'scientific accuracy' (Fraser 2019). boyd and Crawford explain that this perception originates from the "mythology" of big data, which is the "widespread belief that large data sets offer a higher form of intelligence and knowledge that can generate insights that were previously impossible, with the aura of truth, objectivity, and accuracy" (2012, 663). Although mainstream press outlets often enable this simplistic preconception, the coding used to gather and decipher big data are not impartial. Such biases are further entrenched through Netflix's own media channels, such as its technology blog, media centre, social media, and press interviews, which promote the novelty of the algorithms that power its IDTV portal. While Netflix's public narrative may borrow ideas of algorithmic impartiality as a differentiation tactic, an examination of its algorithmics in action (through recommendations, personalisation, and categorisation) reveal the inherent and deliberate biases behind their design.

1.4 Rhetorical Strategies

IDTV benefits from Netflix's rhetorical framing of internet-enabled technology, such as streaming, data, and algorithms, and the kinds of discourses this framing enables. This section expands on the discussions of algorithmic culture and big data to identify internet discourses as those focusing on ideas of control and user-activity. It builds on what Tryon calls the “promises of plenitude, participation, prestige, and personalization” to argue that Netflix uses these ideas to mythologize IDTV as an ‘experience’ different to that of broadcast, cable, or satellite television (2015, 104).

In her work on streaming portals, Lotz notes that television is characterised as a series of practices based on the dominant form of television distribution of the time (2017, 13). IDTV is television, albeit a new iteration of the form. Arguments suggesting otherwise have relied on a fragmented definition of television that separates it from the industrial, social, cultural, and economic contexts that govern its creation and reception. Scholars like Lobato (2017), Lotz (2016, 2017), Jenner (2018) and Dunleavy (2018) have countered these definitions, identifying television as a medium that supersedes a singular definition. This dynamic approach leaves room for the acknowledgement of what audiences had already intoned – that television is an ‘experience’ that is greater than the sum of its parts, despite those parts remaining invisible to the everyday consumer or over-emphasized as a defining characteristic of television by critics and commentators. While the innovations of the internet-delivery platform have garnered attention in television studies, an under-examined aspect has been the importance of parlaying technological difference into rhetorical differentiation. The importance of “being textually distinctive” itself has been discussed in television academia, with notable examples in the American market being the production of original, ad-free, subscriber-supported content on premium cable channels and networks (referred to here as PCNs) (Dunleavy 2018, Lotz 2017, 18). Netflix appropriated the subscriber-funded model and the creation of original programming from PCNs but recognised that the viewing experience available to B/C/S audiences only extended as far as the selection of a network’s content and the strength of its branding. Netflix was able to discursively differentiate the technological advantages of its portal by highlighting to viewers the kind of convenient, intuitive, and personalised *experience* it could provide.

The problem of how to define and understand 'experientiality' in discussions of IDTV is an ongoing one. Lotz, Lobato, and Thomas (2018) caution that, "at this point, the conversation about internet-distributed television tends to overemphasize programming at the expense of how these services deliver a different viewing experience from linear norms", while stressing that "factors of experience and convenience may be just as important as subtle programme differences" (2018, 4). Lotz especially has brought attention to the need for scholars to examine the "experience of the portal" and the way that experientiality naturalises certain routines of viewing (2016, 138). Similarly, Christian has discussed how early producers of internet video were able to give viewers "digital experiences aesthetically different from on-air" (2012, 346). Digital media and software studies scholars were more familiar with experientiality as it related to the 'long tail' – the idea that the online marketplace has allowed the selling of niche products to become economically sustainable because of its aggregation abilities (Anderson 2008). The internet had been seized on by companies who used its capabilities to more easily locate and market to customers, which helped them realise the value of extending control and convenience to their customers in order to further commodify the online shopping experience (Anderson 2008). Underlying the idea of user-focused experience are discourses of active users and interactivity. Internet scholars like Kitchin (2014) and Sandvig (2015) have problematised the utopian freedoms promised by proponents of the internet and the "network of equals" that active users would supposedly participate in (Sandvig 2015, 290). Convergence scholars like Jenkins (2004, 2006) and Gray (2010) have studied active audiences and the opportunities they provide to re-evaluate user agency in the networked era.

This thesis chooses to highlight the conceptualisation of television as an experience because the term accounts for the multiplicity of television's delivery and reception technologies. It ensures that all of the industrial, economic, creative, and technological components that enable the 'experience' are included in the understanding of television as a cultural form. Significantly, this conceptualisation shows that IDTV's disruptive impact on the television industry is representative of a "mediatization" in which the processes of novelty, evolution, and normalisation occur regularly, expanding the medium of television through inclusion rather than replacement (Kratz 2007). Netflix's novelty was to provide a *subscription-funded*

IDTV portal that combined the user-friendliness of internet technologies with television forms and genres. The strategies of IDTV are being increasingly adopted by broadcast, cable, and satellite networks, resulting in a normalisation of IDTV portals, interfaces, delivery methods, and reception rituals for networks and viewers alike, irrespective of the diversity of norms of current and newer IDTV providers.

The shift towards adopting the practices of IDTV providers has shone light on the chatter that occurs in the business of creating, selling, and advertising television and its role in discursively creating the experience and idea of the medium. According to Christian, there is an idea of an “industry lore” that governs the creation of normalcy within the television business (2018). This type of ‘chatter’ is an undulating back-and-forth between professionals in the industry, the press, the public, and academics. However, as Christian notes, “scholars are only beginning to understand how big data and algorithms are affecting cultural production and distribution” (2018, 217). Inherent to the construction of the Netflix experience is the kind of industry discourse that permeates popular media and informs academic discussion. Benjamin Burroughs calls such discourse “streaming lore”, which is a continuation of an idea loosely articulated by scholars like Todd Gitlin (2018, 1). Gitlin wrote about the “industry chatter” that television executives factored into their decision-making as a way to compensate for the constant state of uncertainty they faced when predicting ratings success (1983). Because television tries to balance the competing demands of art and commerce, the everyday processes through which it is judged by the professionals who create it (executives) and value it (the press) are important to acknowledge, despite the difficulty of discussing them in academia. Timothy Havens (2008), Avi Santo (2015), Amanda Lotz (2015) and Jim Draper (2014) have all identified the importance of the informal chatter that occurs between industry-insiders at press events, industry parties, and business meetings, which is then reported on in industry and trade publications. Draper terms it “discerned savvy”, writing that “creative workers’ agency may be subtly circumscribed in ways that maintain the hegemony of particular textual forms and ideologies in cultural industries even in the absence of formal policy” (2014, 118). Acknowledging industry lore is important because it represents a broader acknowledgement of television production within media studies academia. The manifestations of industry lore create the ‘intuition’ of television production and reception which influence how certain practices are privileged and why certain schools of thought become hegemonic, such as the idea of the “internet as the anti-television” (Sandvig, 2015, 287). Including this ‘lore’ enables this thesis to focus on the rhetorical construction of the ‘Netflix experience’ and its function in normalising Netflix’s particular and pioneering iteration of subscription funded IDTV.

Netflix rhetorically frames streaming as a process that enables behavioural casualization, which allows the company to position the consumption of content on its platform as both an active and passive practice. Casualization legitimizes the full spectrum of viewing experiences that users can have with televisual entertainment, allowing subscribers to apply as much or as little concentration, commitment, and engagement as they desire. The business of acquiring content which motivates engagement – through commissioning, acquisition, or co-producing – remains of equal importance to the spatial and temporal opportunities of the Netflix portal, as there has to be enough value attached to the portal and interface itself to motivate the maintenance of a monthly subscription. Under Netflix’s purview, television rhetorically becomes all things to all people. The power to define what television ‘is’ and the experience a user has with it, is extended to the viewer.

The approach Netflix took in using data mining to enable user-specific marketing has been likened to narrowcasting (Novak 2017, Barker and Wiatrowski 2017). Narrowcasting is the practice of delivering media for a specific segment of viewers that share sociological or economic commonalities (Barker et al 2017). It allowed television networks to differentiate themselves from competitors by “articulating the main lines of cultural consensus for the particular network and its typical audience member rather than for society in general” (Lotz, 2014, 45). Defenders of narrowcasting hailed it as a “democratic part of the future of media” in which “more groups are represented and more space is created for a variety of audiences” (Novak, 2017, 165).

Netflix’s use of algorithmic data-gathering as a part of the commissioning decision-making process allows it to make a similar argument. In theory, Netflix’s strategy of grouping audiences according to their tastes (which it terms ‘taste communities’) allows it to identify previously concealed audience configurations. The information Netflix gathers from, and about, these communities give its content a greater chance of being noticed, as the streamer can target them precisely and market its content in ways which highlight the most appealing aspects for each of the niches. The tension between mass and micro is represented in Netflix's strategy. In attempting to create an interface that all of its 150 million worldwide users can find appealing, enticing, and intuitive, Netflix recognizes big data's importance in aggregating a widely satisfying product. However, designing algorithms with the goal of recommending the most accurate results for each individual user has been one of Netflix's most publicized strategies. This was evidenced as early as 2006, when the company issued a global challenge it called the 'Netflix Prize'. The Prize offered a reward of one million dollars to the first person/team of people who could improve Netflix's existing recommendation software (Cinematch) by at least 10 percent (Jackson 2017). The move garnered media attention from traditional news outlets like the *New York Times* ("And if You Liked the Movie, a Netflix Contest May Reward You Handsomely") and STEM-based publications such as the *Massachusetts Institute of Technology Review* ("The $1 Million Netflix Challenge"). Of more interest than the cash prize was the huge dataset of 100 million ratings that the company made available to competitors (Jackson 2017, Hafner 2006). At the time, recommendation science had stalled, partly due to computer scientists' lack of access to large-scale datasets, which are required for the creation of precise and actionable algorithms, and the scarcity of these datasets, that were limited to a few global companies like Amazon and Microsoft (Hafner 2006). When Netflix allowed access to its own (still anonymised) dataset, it widened the field of recommendation science beyond the employees of Amazon, Google, and Microsoft and provoked innovation by allowing qualified entrants all over the world to test their algorithms against Cinematch. As Hastings claimed, "the beauty of the Netflix Prize is you can be a mathematician in Romania or a statistician in Taiwan, and you could be the winner" (quoted in Hafner 2006). Ironically, Netflix only marginally implemented the winning team's recommendation system, primarily because the company launched its streaming service shortly after the Prize was announced and found that streaming had not just "changed the way our members interact with the service, but also the type of data available to use in our algorithms" (Amatriain and Basilico 2012). Netflix's rapid growth over that period only served to emphasize the need for ever-evolving IDTV software, as the company details in the Netflix Tech Blog. In this way, Netflix's contributions to the datafication and algorithmic culture of IDTV demonstrate the continued role of narrowcasting and broadcasting, while acknowledging that narrowcasting's commercial opportunities are the primary motivator for its data-based iteration.

The speed and spread of algorithmic culture within the greater television industry is partly due to Netflix's use of data. Netflix's portal, with its in-built data-tracking and algorithms, has enabled the streamer to market to 'taste community' audiences of its own making in a direct, instantaneous, and discretionary way. Netflix sends badge alerts to those subscribers' smartphones it has calculated to most likely enjoy a new series as soon as the series becomes available for viewing. It also places alerts in their updates bar, can send emails announcing the show, and is able to place the show at the beginning of the 'recommended' or 'watch later' queues upon its release. The company also sends push notifications and emails with suggestions about Netflix original programmes that the subscriber 'may have missed' or 'might enjoy'. These strategies show Netflix's capabilities around making its subscribers immediately and directly aware of new programmes in its catalogue. The streamer is capable of promoting older content to new and existing subscribers by making programmes visible weeks, months, or even years after initial release. As Lycett notes, "from the subscribers' perspective, the queue is the primary manifestation of destiny, as it mobilises the resources for a given context, time, and place" (2013, 382). Netflix has a huge degree of invisible control over its subscribers' viewing experience while simultaneously providing them with a large degree of visible governance. The concept of 'invisibility' to describe the unseen but pivotal technological systems and protocols has been used before in computer studies but has recently begun to gain influence in cultural studies for its relevance to the production, distribution, and reception of media content (Kelly 2019, Striphas 2015, Napoli 2014). Computational forces – software, big data, networks – have become essential for all digital interactions but, despite their preponderance, most viewers remain unaware of their function (Kelly 2019, Kitchin 2019). This is particularly true of television consumers, who are "largely unaware of how television ratings work or their own role within such a system", despite big data's "integral role in every facet of television culture" (Kelly, 2019, 117).

The interplay between exerting and relinquishing control is one of the internet-based practices that Netflix has contributed to the norms of the television industry. IDTV portals are now common, as evidenced by the growth of competitor services such as Amazon Prime Video, HBO Max (formerly HBO Now) and Disney +. As a result, questions around “data colonisation” and how the industry can accommodate issues that were previously relegated to the realm of software, websites, and social media, have entered the scope of television studies (Fraser 2019). Although data colonisation – the “gains made by technology firms who colonize, aggregate, and capitalize upon data” – has been prevalent since the emergence of a global internet infrastructure, its implications are useful in conceptualising Netflix as a streaming business (Fraser 2019 1).The way that Netflix encourages subscriber behaviour – and the way that its users have learned to interact with it based on established internet protocols – can be understood within a larger framework of internet engagement that highlights the complexities of the user-provider relationship. For instance, the personalisation made possible by Netflix’s aggressive data-gathering algorithms enables a highly customized user experience for viewers who watch content on the portal. Netflix makes this process appear discreet and benign through its rhetorical framing of user control and personalisation, which mask the continuous machine-learning happening behind the scenes. However, Netflix users can, if desired, enact their agency. They may reject the suggestions recommended to them in the queue, disable notifications, or search out content that is buried in the catalogue. While these actions may contradict the predictions of Netflix’s algorithms, they also provide the company with enough data necessary to course correct. Thus, the Netflix-subscriber dynamic reflects how any interaction between “passive acquiescence and active resistance” contributes to the “curation of the digital geographies of flow” (Fraser 2019, 2-5). Netflix’s value is both as a television industry player *and* internet company. It not only becomes an exemplar of the lifecycle of digital media companies and their innovation and infiltration, but a preeminent discursive site of knowledge creation for subscription-funded IDTV.

The targeting of mass and niche audiences reflects Netflix’s use of existing television logic, in addition to the television forms it relies on. The company not only uses this logic to guide content creation (like cable networks) but applies it to its interface design to make the experience of accessing content on the portal widely appealing for its 150 million subscribers while still providing personalisation for each user through effective layout design and intuitive computer learning algorithms. Through its delivery platform, Netflix has been able to maximise the benefits of broad-and-narrow casting in a way that terrestrial television networks have not. In the process, it exemplified the strategies that have allowed IDTV providers to become a permanent fixture of the television industry.

1.5 Netflix and Algorithms

Netflix's algorithmic approach covers every part of its inner workings – from commissioning to marketing to social media monitoring to genre categorization to selecting artwork for its content. For example, in a 2014 study, Netflix discovered that program artwork was the single most significant deciding factor for audiences when choosing what to watch, and furthermore, made up 82 percent of all Netflix browsing (Nelson, 2016). Netflix deploys the algorithmic discourses of personalization and control, creating a sense of interactivity between the Netflix interface and the viewer, providing ease-of-access with a system that appears to do half of the work for the audience. This strategy synthesizes the cultural and technological opportunities of the convergence age, putting the 'experience' of the Netflix portal at the centre of its brand identity. Former vice president of product innovation and personalization algorithms Carlos A. Gomez-Uribe and former chief product officer Neil Hunt employed 'choice-heavy' streaming lore when describing the Netflix recommender system:

> Internet TV is about choice: what to watch, when to watch, and where to watch, compared with linear broadcast and cable systems that offer whatever is now playing on perhaps 10 to 20 favorite channels. But humans are surprisingly bad at choosing between many options, quickly getting overwhelmed and choosing "none of the above" or making poor choices (e.g., see Schwartz [2015]) (2016, 2).

Gomez-Uribe and Hunt differentiate Netflix from broadcasters through its personalization but emphasize the value of creativity so as not to alienate consumers who are not tech-conscious. They write that Netflix is able to cater for niche audiences because of its personalization, an approach that "would not make sense for broadcast TV models because their audiences would be too small to support significant advertising revenue or to occupy a broadcast or cable channel time slot" (2016, 6). According to Gomez-Uribe and Hunt, the end goal of the recommender system is not to gather data, but rather to "win moments of truth" and help users find "engaging" and "compelling" entertainment through machine-learning which supersedes the user's own assumption of what they want and provides them suggestions based on what they have actually been watching (2016, 7). Such rhetoric may be an attempt to combat user concerns about data collection while concurrently mythologising the power of Netflix's interface.

Netflix recognised that normalising IDTV began at the intersection of interfaces, the internet, and the creative video industries. This means that its recommendation algorithm, named Cine-Match, suggests programmes that directly correlate to viewed media (such as other films by the same director or spin-off shows) but also makes visible programmes that it anticipates the viewer might enjoy, based on Netflix's own comprehensive data around popularity, critical reception, and user ratings. Like other internet companies, Netflix's software architecture is designed to be self-learning, so that "every time you press play and spend some time watching a TV show or a movie, Netflix is collecting data that informs the algorithm and refreshes it. The more you watch the more up to date the algorithm is" (Blattmann 2018). Furthermore, Netflix's platform identifies the basis of its recommendations to the viewer. A list of similar films or programmes will be presented to the viewer as, 'because you watched X film', or 'Emmy-winning TV shows'. In disguising the mathematical equations behind its algorithms but making the fruits of that apparatus visible, Netflix can ubiquitously remind users that their individual preferences are constantly being accounted for. The personalisation of each subscriber's platform is a reminder to them of Netflix's dedication to, and concern over, every user's unique preferences. Most importantly, personalisation allows Netflix to advertise its original content directly to its individual subscribers in ways that are likely to be accurate. Although these processes exemplify both corrupt personalisation (through its advertising particularly) and mutual domestication, the streamer frames them as valuable services provided to consumers out of a desire to service their entertainment needs.

Like big data, algorithms are subjective. Since they participate in a system of taste-making, algorithms can create and enforce hierarchies of taste, thereby troubling societal understanding of what 'culture' is and how it functions. Kelly Uphoff, Netflix's Vice-President of Content, Marketing Science, and Analytics, discussed how the company publicises its use of algorithms to sustain a reputation for novelty and innovation. According to Uphoff, Netflix's success is explained by its combined 'left brain/right brain' approach to original programming. In terms of commissioning, it creates algorithms that target the most likely emotional response across a selection of audiences. Netflix uses adaptive technology to consider the best ways of "build[ing] literal and emotional connections between audiences and titles in revolutionary ways" (Uphoff, 2017). This rationale demonstrates how Netflix's algorithmic approach actively contributes to these processes of meaning-making while exploiting its mass data in ways that can maximize its success in these categorisations. Industrially, Netflix's approach has increased the level of uncertainty around production and reception within mainstream media providers, something which has not gone unnoticed by Netflix itself, as described by Uphoff:

> Think about all the ways that data science, including machine learning, deep learning, and AI, can disrupt the entertainment industry more than it's already been disrupted. Then think about all the behavioral data, text data, and images that Netflix can leverage. That is where we want to head (Uphoff, 2017)

Another example of mutual domestication in action is the way that Netflix's portal encourages subscriber activity and builds on user familiarity with internet habits around scrolling, searching, and content selection. Algorithms compile data from each subscriber interaction into recommendations, a watch-queue, a 'watch next' list, and more recently, 10 second previews. The recommendations may be personalised to each user's search and watch history, but the big data gathered allows Netflix engineers to write algorithms that produce increasingly user-friendly interfaces. They can also predict features that are likely to be well-received by subscribers, based on the most engaged-with elements. For example, after the installation of a download feature, where episodes of certain shows and films are made available for offline viewing over a limited period of time, Netflix introduced its “smart downloads” feature (NMC 2019). The feature deletes a downloaded episode after it has been viewed to free up storage space, and begins downloading the following episode, both of which are done automatically unless the user manually stops the process or disables the feature (NMC 2019). Netflix’s press release took care to mention how ‘smart downloads’ allows subscribers to circumvent “pricey or spotty internet access” when using Netflix in transit or outside of the home (NMC 2019). Such rhetoric differentiates Netflix from television providers with linear networks and highlights the physical freedom and temporal control that subscribers can have, not only over their content, but over the environments in which they consume the content.

Another of the convenience factors for ‘smart downloads’ is that they only activate when a subscriber’s device is connected to wi-fi, meaning that their data plan will not impacted/depleted by any episode downloads. Netflix’s statement emphasized the intuitiveness with which it designed the feature, saying that the company “know[s] how annoying it can be to go through all your apps and delete files you no longer need” and that they “understand that when it comes to Netflix, the faster you can get to the next episode you want to watch, the better” (NMC 2019). The statement reiterates how the streamer recognises the labour and potential downsides involved in interacting with digital technology on the part of users – such as deleting unnecessary files and unintentionally using up your data plan – before noting that it has taken this labour on to itself in order to facilitate more seamless episode transitions for its subscribers. These unbroken transitions encourage subscribers to spend more time on the Netflix portal, and this investment of time is part of what the company believes will help subscriber retention (McAlone 2016). The press release concludes with a reminder that “giving consumers more control over their entertainment experience is at the heart of everything we do”, again affirming the importance of perceived control (but not necessarily content) to the ‘Netflix experience’

(NMC 2019). Smart downloads, among other Netflix conveniences, demonstrates the interplay between user and platform, reflecting once more the function of mutual domestication in the company's strategies and success.

The use of algorithms for the purposes of collating information about individual and mass users is not unique to Netflix and other IDTV providers. This capacity has been operational in internet companies for decades, as is the imperative to identify and quantify audiences in television networks. One of Netflix's breakthroughs has thus been the introduction of algorithms, and the various audience measurement opportunities it affords, into the television industry. When Netflix began its video streaming service in 2007, its only competitor was Amazon Prime video and, a year later, Hulu video. All three services were considered separate from conventional broadcast and cable television (despite NBC Universal and News Corporation's ownership of Hulu, and Disney's 2019 acquisition of the service). As Netflix's international subscriber rate grew – thanks in large part to its use of algorithms, data, the internet, and its portal – it was able to demonstrate the viability of IDTV, as evidenced by the number of existing networks who have launched (or announced an intention to launch) their own streaming services. As of 2021, the American television landscape includes subscription-funded services like HBO Max and Disney +, and multi-tier services like NBC's Peacock, which provides three levels of access, one of which is free and ad-supported and two of which are advertiser-funded but supplemented with monthly subscription costs (Knight 2020). These services demonstrate the added value and variety enabled when existing B/C/S networks include an IDTV dimension.

Some aspects of IDTV as it is commonly understood – the queue, watch later list, individual profiles, and searchability – were made popular, and market-tested, by Netflix. Crucial among them are the company's employment of big data and algorithms in the viewer/user experience. Netflix's algorithms may be highly complex but, importantly, they do not guarantee accuracy and cannot provide objectivity about anything other than a user's interactions with the Netflix portal. This distinction is important because, as Cheney-Lippold notes, the value of algorithms is not their input about "essential notions of identity" but their production of “pliable behavioural models, undergirded by algorithms, that allow for the creation of cybernetic relationship to identification” (2011, 168). Once a profile is created for a user, the algorithm continually updates the profile, often in real-time, based on the actions that user is taking with the application. With Netflix, that means that a user’s perceived tastes and preferences are constantly refreshed in correlation to what that user is doing on the Netflix portal – what they are watching, for how long, at what times, in what order, and when they are fast-forwarding, re-playing, or re-winding. Netflix’s decision to focus attention on the user-friendliness of its portal has been well-received, according to a 2019 study conducted by PricewaterhouseCoopers (PwC). Based on a statistically representative sample of 1000 Americans between the ages of 18-64, the research firm concluded that “overall user experience” was considered roughly as important as content selection for users of SVOD services (Spangler 2019). Content appeared to be the largest overall motivator for new subscriptions, with 36 percent of respondents citing it as their primary reason for signing up to a streaming service, while price point was listed as the largest factor influencing whether or not a user continues or cancels their subscription by 63 percent of those surveyed (PwC 2019). However, the “most surprising” finding of the study was that “usability and experience factor significantly… into subscriber retention” and the loyalty and differentiation that a positive user experience provided was key to an SVOD’s long-term success (McCaffrey 2019).

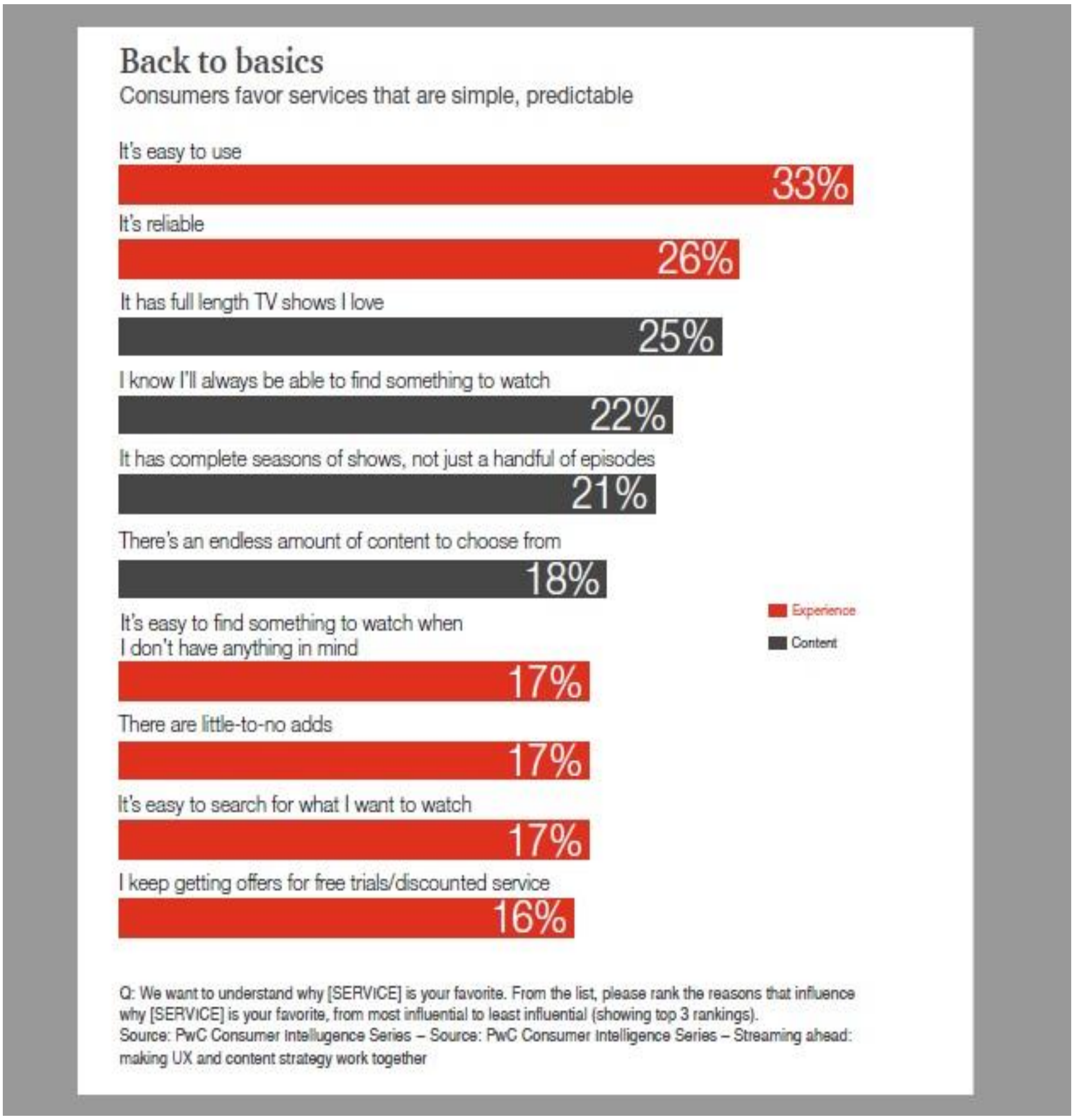

Figure 1. (PwC.com 2019)

PwC's findings, shown above in graph form, offer some confirmation that one of Netflix's key early disruptions to the television industry was its understanding that its technological advantage would be an important differentiator. It compensated for its initial shortage of content and its lack of bargaining power within the industrial infrastructure of the existing broadcast/cable ecosystem by investing resources into its portal. With access to data engineers, algorithms, and the real-time ability to track subscriber behaviour, Netflix was able to apply the user-focused features of the internet to the experience of consuming television content. In creating, popularising, and normalising this 'new experience', Netflix achieved a "finely tuned balance of popularity, user behavior, diversity, novelty, personalization, contextualization, surprise, and delight" (Weinman, 2015, 208). The word 'delight' – used here by scholar Joe Weinman – has been present in much of Netflix's own marketing material. As recently as July 2019, Netflix engineers authored a missive outlining their approach to the recommendation algorithm, where they include the importance of suggesting "delightful" content (Lamkhede and Das 2019). If a user searches the catalogue for a specific word or title, Netflix not only returns all titles that contain the search words but also includes other, similar titles. These recommendations are put forth by an algorithm that is tasked with recommending content that "has to delight users by helping them discover something that they would like to stream" (Lamkhede et al 2019). This serves to satisfy the user's original intent while providing them with options for alternative or future viewing. In cases where a subscriber has searched for an item not contained in the Netflix catalogue, the algorithm must still "provide them with relevant and delightful recommendations that the users are likely to stream in the absence of the original entity" (Lamkhede et al 2019). In this instance, Netflix's algorithms must offer substitutes that sufficiently approximate the genre, director, or actor featured in the originally searched title, but must further demonstrate to the subscriber that their search intentions, in terms of entertainment and taste, were sufficiently understood.

Discursively, Netflix tries to position its portal's 'ease of access' an end goal in itself, separate from content-oriented goals. For example, in an official 2018 blog post, Netflix framed its discussion about updating its metrics microservices architecture around the software's aim of "delivering joy to our members by providing high-quality content presented with a delightful experience" (Lew and Narayanan 2018). Through this streaming lore, Netflix places emphasis on the idea of 'delighting' the subscriber and equates 'delight' with the satisfaction a subscriber gains through a user-friendly experience with the Netflix portal. Netflix allows it subscribers to become accustomed to the differentiation of its delivery platform, combining the internet-based features they may have been familiar with previously, such as search engines, scrolling, and logging in, with the experience of watching television content without temporal disruptions or limitations.

1.6 Netflix and Streaming Video

> Now, our recommender system consists of a variety of algorithms that collectively define the Netflix experience.
> (Carlos Gomez-Uribe, vice-president of personalisation and algorithms, and Neil Hunt, chief product officer, 2016, 2)

Netflix conducts 'asset management' over its catalogue of television programmes and films. Using a complex mathematical system and meta data, it assigns descriptors for each item and groups them on a macro level (by genre and popularity) and a micro level (personalized suggestions for what each user is most likely to play) according to Netflix's algorithms. Netflix then loads its content onto an Amazon-owned server but uses its own content delivery network (CDN) named Open Connect to deliver media to ISPs in 190 countries (Netflix Media Centre, 2016). When subscribers play a video on a Netflix platform, the video is transcoded and rendered, copied in various rates of resolution quality, ranging from 180p to high definition. The video file is then optimised according to an adaptive bitrate, meaning that the version of the video played depends on the user's internet speed, operating system, and device capabilities. As users stream content and interact with the interface, Netflix collects analytics, compiling the data into sets for each individual subscriber and sets that allow its algorithms to extrapolate wider patterns for subscribers according to age, geographic location, and other common groupings. The sole function of Netflix's website is the registration of new subscriber accounts and their payment information (primarily credit cards which are charged monthly). Once a user signs up, they will be directed to install the mobile device application on their smartphone or smart TV.

In 2018, Netflix developed its own "data warehouse" named Metacat (Majumdar and Li, 2018). Metacat is Netflix's solution to tech companies' shared problem of synthesising huge quantities of data and is unique to Netflix's raison d'être of distributing streaming media. From a user's perspective, Metacat makes searching Netflix's catalogue efficient and easy because it acts as a 'go-between' for the diverse systems and computer languages that produce the different types of data at each level of a search. Metcat is responsible for functions like autofill, auto-suggest, and the logging of content tagging, which helps users find specific genres or titles and allows Netflix engineers to provide more niche categorizations. Metacat logs how many episodes users watch in a row, keeps track of whenever users pause, rewind, or skip forward in an episode, and timestamps the points at which users watch stop watching Netflix altogether, as well as when, and how often, they return to the portal. It saves each subscriber's search history in order to make correlations between their browsing and their viewing. Netflix keeps track of the engagement for what it vaguely deems to be 'pivotal scenes' across its original shows, including plot twists, narrative climaxes, and cliff-hangers, particularly in premiere and finale episodes (NBT 2016). Additionally, the company asks viewers to rate shows and add content to their individual lists, encouraging active behaviour. Once Netflix has gathered this data, it is used to inform interface decisions and improve existing features. Netflix's analysis of big data led to the implementation of the 'skip intro' button and the 'next episode' countdown. Access to data led to algorithms that enabled the creation of pre-arranged bundles of programmes in sections like 'trending in your country' and recommendations based on the shows that viewer has recently seen. The company uses data to market directly to users, promoting its original content through trailers and thirty second previews that appear as easily clickable circles when subscribers first open the application. Once opened, the options to play immediately or add to list materialize on the bottom of the screen. Netflix further utilizes data to encourage engagement by sending email suggestions and push notifications about recently added shows and new episodes of a series that the viewer has been watching.

Such features are attractive to consumers because they manufacture the appeal of ease and user-friendliness, but they additionally remove the burden of viewer labour, despite such labour being necessary to utilizing Netflix's abundance of variety and specificity. Making this specificity possible was one of Netflix's earliest algorithmic endeavours. As mentioned earlier, Netflix ran the 'Netflix Prize' competition between 2006-2009. Despite being a technological contest, the Netflix Prize gave scholars the chance to examine algorithmic culture. Competitors for the Prize eschewed conventional categories like age, gender, and race, turning to alternative datasets that have roots in math and information systems. One such breakthrough is the singular value decomposition (SVD) (Hallinan and Striphas 123). SVD “does not arrive at definitive solutions but rather statements of fit that closely approximate relationships among salient data points” (Hallinan and Striphas 124). Essentially, it gave Netflix programmers the ability to approximate the nuances of individual taste and the inconsistencies of human preference. For example, SVD-based algorithms could be written for viewers who enjoyed romantic movies with ensemble casts but not two main leads, or who preferred crime shows set in overcast cities (New York, Chicago) but not sunny ones (Los Angeles, Miami). Netflix’s intensive strategy of cataloguing the minutia of each individual user’s viewing habits improves the functionality of its platform, therefore encouraging streaming viewing habits which in turn, normalises them. It also uses its huge cache of data to ameliorate its content stylistically, providing options to skip recaps and introductions, and skip forward or backwards for ten seconds in an episode at the tap of a button.

Netflix’s software designers take care to highlight that its real purpose is to make Netflix’s data “meaningful and discoverable” for its subscribers (Majumdar and Li, 2018). Metacat’s engineers do not define what counts as a “meaningful” Netflix experience and this vagueness allows the company to take credit for any positive interactions that its subscribers have while using the interface, regardless of whether they consume acquired or originated content. The relationship between television interfaces and the amorphous attribution of worth was previously noted by scholar Daniel Chamberlain, who wrote that viewers had “meaningful new forms of control over their televisual experiences and that this control is expressed through interactive engagements with television interfaces” (2010, 86). While Chamberlain spoke of emerging television technologies specifically, the importance of meaning-making in the user-media dichotomy in general was highlighted by Gitelman, who stated that digital media are significant because they are a “socially embedded site for the ongoing negotiation of meaning” (2006, 6). What Chamberlain and Gitelman have observed is the burgeoning role that experientiality has had in media scholarship and the television industries. Netflix’s contribution to the television industry has been the incorporation of internet technologies in the delivery of television content through a non-linear, subscriber-funded portal. The streamer interpreted the creation of a 'meaningful' experience as the creation of value through user-control and user-friendliness. Essentially, Netflix's portal is *itself the experience*, separate from the content it delivers and capable of creating value on its own merits. By those standards, Netflix is able to deliver an 'experience' of IDTV that, from the consumer's perspective, is rhetorically differentiated from linear television. Importantly, differentiation does not mean replacement. While Netflix's pro-internet language encourages consumers to think of it as the 'future of television', in reality, existing B/C/S networks are swiftly adopting IDTV capabilities, either through supplementary AVOD services or stand-alone SVOD services. Netflix's disruption of the television industry is its demonstration of IDTV's viability as a permanent category of content delivery, and, more recently, content origination. The temporal and user-focused affordances of its interface provides subscribers with opportunities for control, choice, and personalisation over their viewing experience, thus creating a need for viewer agency that the company can simultaneously present solutions for.

1.7 The Netflix Tech Blog

The Netflix Tech Blog (NTB) acts as an informative and promotional entry point for consumers and industry workers. Netflix staff from across its digital teams post blog entries that encourage consumers to "learn more about how Netflix designs, builds, and operates our systems and engineering organizations" (Netflix Tech Blog 2020). Ostensibly, the blog aims to give curious observers a 'peek behind the curtain', demystifying the mathematics-based operating tools that construct the Netflix experience.

The NBT interface mirrors Netflix's stated values around intuitive user-friendliness. The beginning of every post approximates how many minutes it will take to read the entry. The trademarked Netflix logo and original font appear at the top of each article, with posts often using bullet points to convey information in easily digestible portions. Additionally, each entry is written in first person by a Netflix employee whose by-line links to their personal

Linked-in or Twitter page, which continues the theme of personalisation at every stage of a user's interaction with the blog, and by extension, with Netflix as an entity.

The first NTB post arrived on December 1st, 2010. It announced that "Netflix is a software company. We don't sell software, but nevertheless software is our lifeblood", thus highlighting internet novelty as Netflix's differentiator from other content providers and creators (NBT 2010). The NBT is unique within the television industry because no other provider – internet-based or otherwise – publicised their technology or software so openly. The rhetorical reminders of Netflix's technological differentiation have remained consistent over the years. In a 2012 post about the software behind Cine-Match, the authors end the jargon-heavy article with a message about the importance of human intuition and customer experience:

> At Netflix, we love choosing and watching movies and TV shows…we use data mining and other experimental approaches to incrementally inform our intuition. Finally, above all, we look to our members as the final judges of the quality of our recommendation approach, because this is all ultimately about increasing our members' enjoyment in their own Netflix experience (Amatriain and Basilico, "Netflix Recommendations: Beyond the 5 Stars", *Medium*, 2012)

The rhetoric of user-friendliness continues in a 2017 post on the topic of personalization begins with a line about the "Netflix experience" before informing the reader that the company's commitment to exploring every possible avenue for personalisation is "yet another way Netflix differs from traditional media offerings" (Chandrashekar, Amat, Basilico, and Jebara, 2017). They emphasize that the IDTV provider has "not one product, but over 100 million different products with one for each of our members, with *personalized* recommendations and *personalized* visuals" [italics in the original] (Chandrashekar et al).

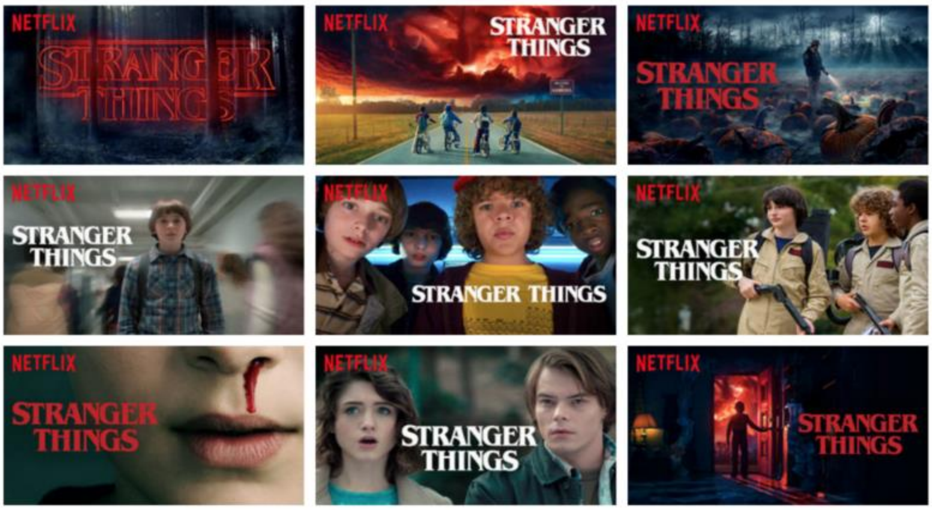

Fig. 2 (Chandrashekar, Amat, Basilico, and Jebara, “Artwork Personalisation at Netflix”, *NTB,* 2017)

The above images are examples of artwork that has more than a five percent engagement rate. Chandrashekar et al explained that each image had to convey the programme in ways that would be simultaneously accurate to its themes and accurate to the interests of each individual user. Through “revolutionary” A/B testing, Netflix devised a series of algorithms that used data to determine the cover image with the highest chance of audience engagement (Chandrashekar et al 2017). One such finding was that viewers responded more positively to images with emotive faces. They associated expressive features with ‘drama’ and ‘comedy’ and were therefore more likely to create an emotional association to ‘entertainment’. To illustrate, below are a series of *Unbreakable Kimmy Schmidt* test images with the successful image marked by a green arrow:

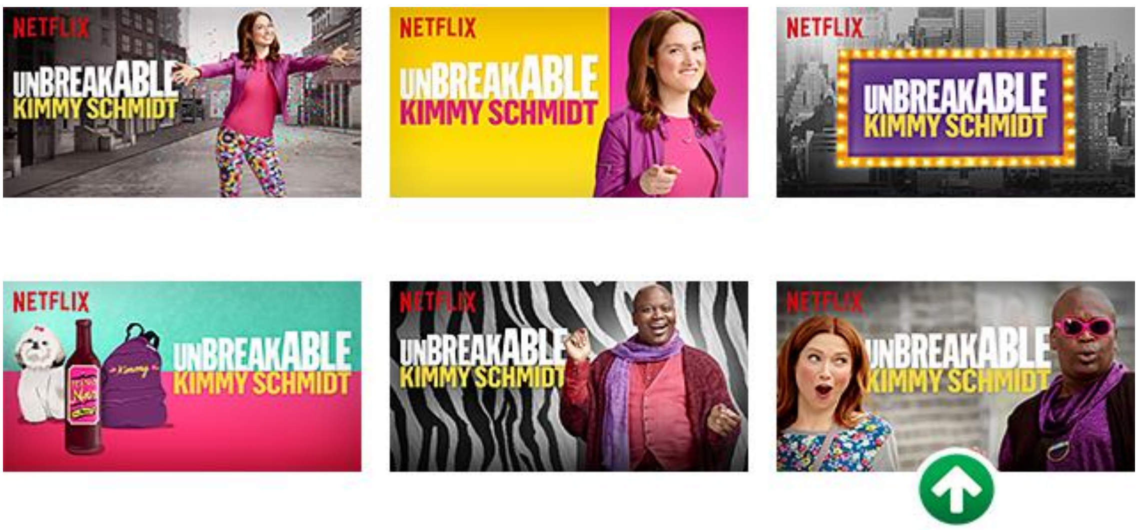

Fig. 3 (Krishnan, “Selecting the Best Artwork for Videos Through A/B Testing”, *NTB,* 2016)

When it came to marketing original programming with international appeal, Netflix's algorithm found that different regions responded to different images. For *Sense8*, a sci-fi serial drama set across different continents and featuring a racially diverse cast, these were the successful cover images:

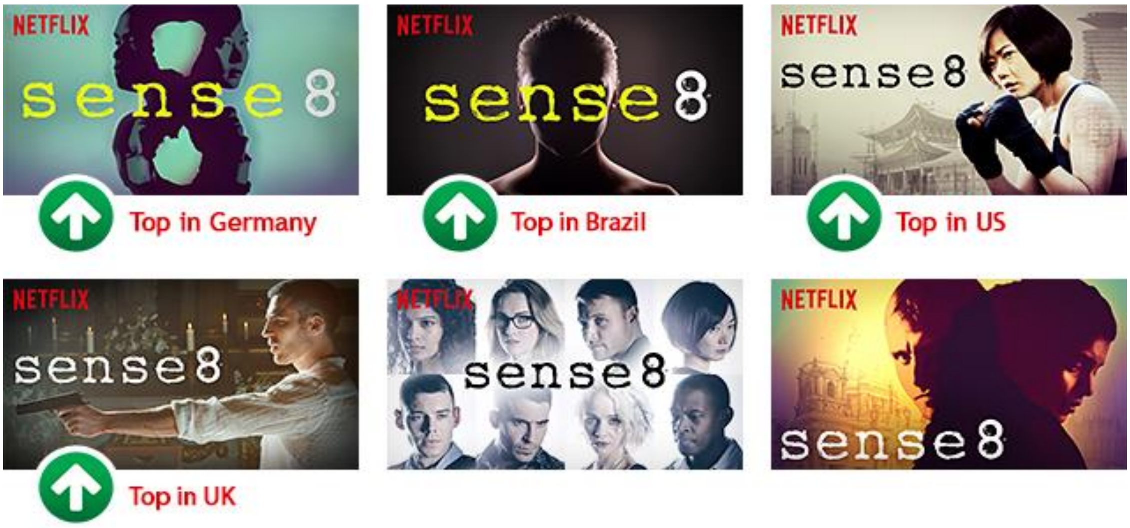

Fig. 4 (Nelson, "The Power of a Picture", *Netflix Media Centre*, 2016)

This algorithm continued to produce sometimes counter-intuitive results. *Orange Is The New Black* was one of Netflix's original flagship shows. Part of its appeal was its ethnically diverse, majority-female ensemble cast, which enabled a series-serial style of storytelling by providing character variety. Despite this selling point, Netflix discovered that viewers responded poorly to images that featured more than three people and subsequently changed the show's feature image for later seasons to reflect this:

Season 1 **Season 2**

Fig. 5 (Nelson 2016) Fig. 6 (Nelson 2016)

Season 3

Fig. 7 (Nelson, "The Power of a Picture", *Netflix Media Centre*, 2016)

Netflix's experimentation with optimising its featured images was simply a starting point. In 2018, the company launched it's 'previews' feature (Grunewald and Casparro 2018). Netflix previews are thirty-second trailers which play automatically when a user hovers their mouse (or finger) over a piece of content. The preview box expands slightly to appear larger than the choices in the queue, and then expands to fill a third of the screen if the user clicks on the information arrow.

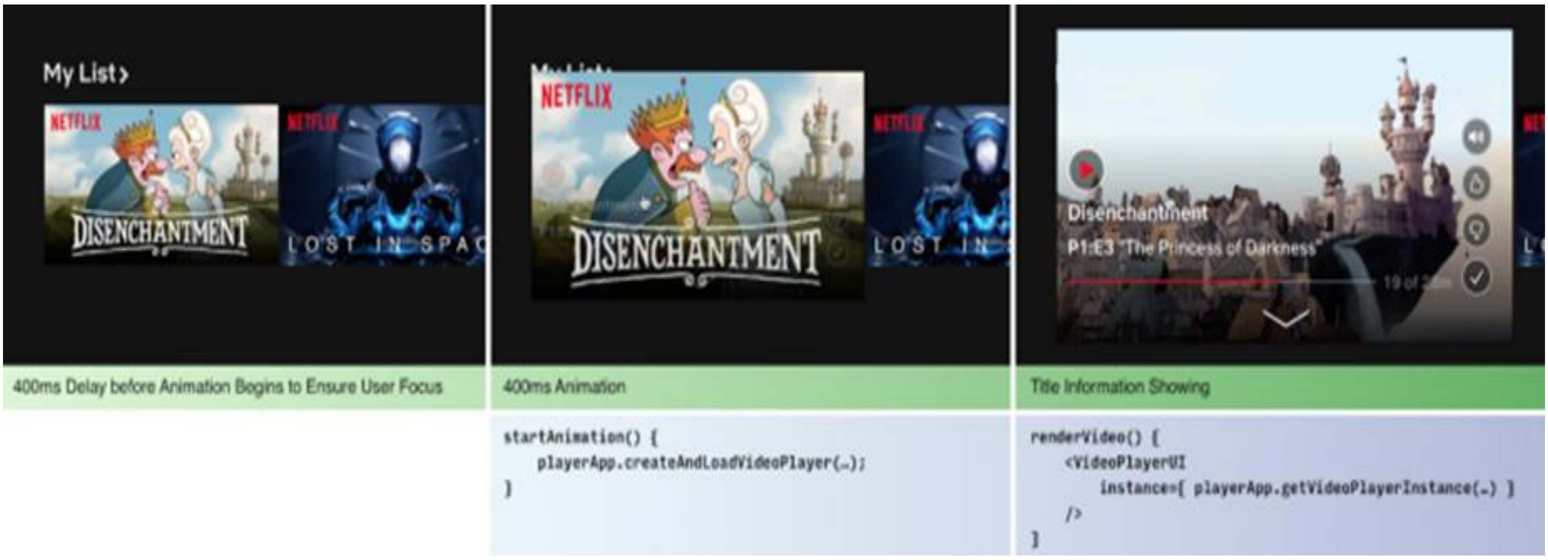

Fig. 8 An example of the preview feature in use for the Netflix original animated comedy *Disenchantment* (Grunewald and Casparro 2018)

Grunewald and Casparro, the engineers of the previews feature, wrote an NTB post about the impetus behind the design process. They cite the difficulties of conveying the correct tone and genre of a programme through static information alone and how moving video provides users with a "deeper understanding about the characters and mood" of Netflix's content (Grunewald and Casparro 2018). The development of previews was in service of allowing subscribers an "intuitive user experience" that delivers meaningful creative information while "avoiding any friction from the interaction" (Grunewald and Casparro 2018). The first point of 'friction' was the amount of information on the first preview screen:

Fig. 9 (Grunewald and Casparro 2018)

While the preview is playing, a brief written synopsis, a percentage match for the user, and a side bar (of a thumbs-up, thumbs-down, or 'add to list' options) are displayed on the bottom of the video screen. Although the summaries are meant to be helpful, they had the potential to be distracting for users who simply wanted to watch the preview without the interference of additional text. To alleviate this 'friction', Grunewald and Casparro designed the text to gradually fade away after ten seconds, an approach they wrote, "worked well for members who wanted to be immersed in the video, while still giving control to members who wanted to read the summary or add the title to their list" (2018). The authors mention that their design deliberately factored in requests for passivity ("immersion") and agency ("control"). This phrasing is in line with Netflix's streaming lore, which positions the company's portal as a new and superior addition to the experience of presenting, delivering, and consuming television. The second point of friction was the question of how to "transfer the playing video from the expanded title canvas to the title details canvas", as demonstrated below:

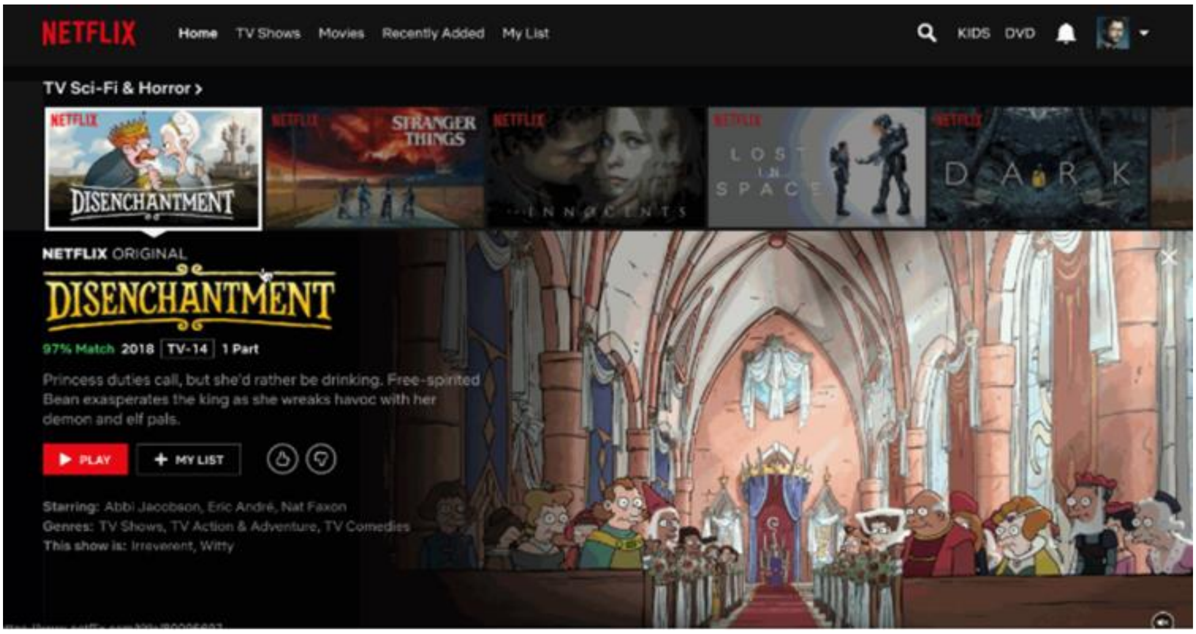

Fig. 10 (Grunewald and Casparro 2018)

Grunewald and Casparro solved this problem by writing a specialised code sequence that allowed the video to seamlessly transition from a small window to a large window, without interrupting the preview (2018). As an internet portal with televisual content designed to be viewed on a range of screen sizes, these 'featured image' and 'preview' considerations are platform specific. Netflix creates protocols to facilitate these considerations and then uses the NTB to draw public attention towards its efforts at improving its interface design while appearing transparent, and, consequently, innovative.

Netflix continuously reinforces its identity as an entertainment facilitator, a be-all and end-all for consumers who want the upsides of technological innovation without having to be software connoisseurs. Users are encouraged to be impressed but not intimidated. The NTB reasserts the narrative that Netflix cares about and understands its viewers, and that the complex programming behind its interface supports a commitment to 'delightful' artistic enjoyment. The company extended this streaming lore in a post titled, "Data Science and the Art of Producing Entertainment at Netflix" (Kumar, Misra, Walraven, Sharan, Azarnoush, Chen, and Govind, 2018):

> Netflix has released hundreds of Originals and plans to spend $8 billion over the next year on content. Creators of these stories pour their hearts and souls into turning ideas into joy for our viewers. The sublime art of doing this well is hard to describe, but it necessitates a careful orchestration of creative, business and technical decisions (Kumar et al, 2018).

Because Netflix defines 'entertainment' as the ability to enjoy streaming media seamlessly, continuously, and remotely, Netflix creates value within its platform and within itself. This value is detached from any particular content in its catalogue but Netflix still benefits from the cultural credibility of abundant programming. Netflix's narrative promises subscribers the end-goal of abundant television – which is entertainment, relaxation, or engagement – through the satisfaction of using its interface.

Another post describes how data is used in the decision-making processes of Netflix original productions. Netflix employs data at all levels of the process, from the creative pitching and budget discussions, to the location-scouting, to the types of camera the cinematography department wants to use, and the subtitles accompanying the finished programme.

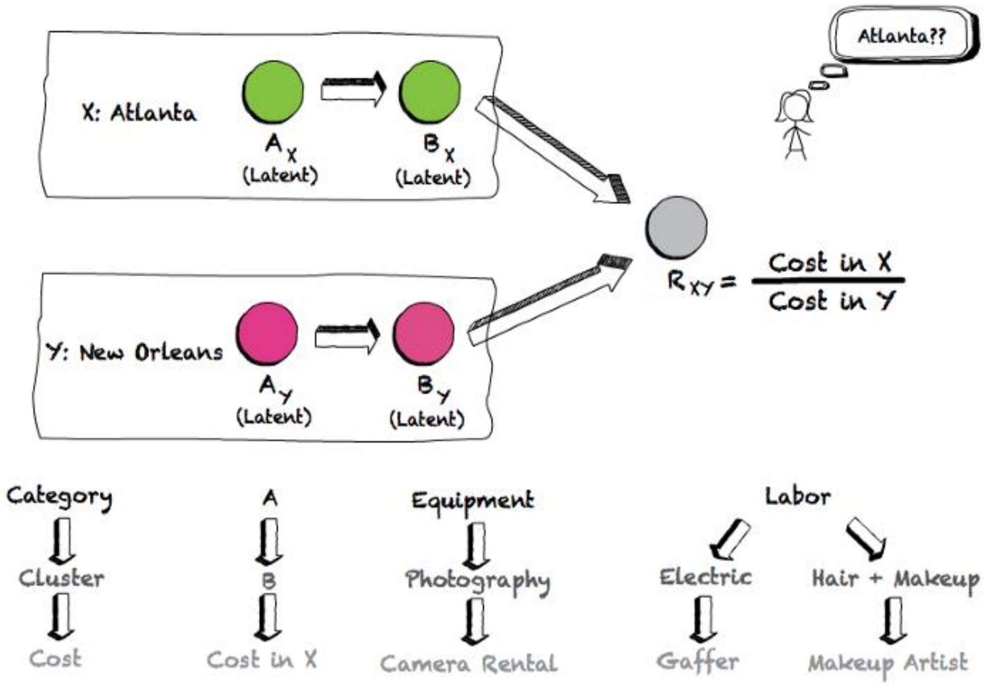

Fig. 11 (Kumar, Misra, Walraven, Sharan, Azarnoush, Chen, and Govind, "Data Science and the Art of Producing Entertainment at Netflix", *Medium*, 2018)

The above chart, included in the post, is a visual explanation of how Netflix data science might be used to help showrunners decide if they should film in Atlanta or New Orleans. The authors explain: "Rather than attempting to learn thousands of parameters in a black box, we carefully construct networks that reflect our intuition about the problem space" (Kumar et al, 2018). Netflix provided its creators with a program that uses algorithms to help generate beginning-stage production schedules. Kumar et al stipulate that "many of these considerations are fundamentally human judgements" but add that there is "room for automation to provide suggestions or assist with the more mechanical side of things" (Kumar et al, 2018). The program works by factoring in variables like start and end times for shooting, contract lengths for guest actors and extras, shots that are daytime or night-time specific, and the days it takes to move gear from one location to the next. It is likely that the data network is purely a cost-saving measure which help the heads of Netflix original productions to maximise budgets by tracking the crew and their schedules for optimum productivity. However, the NBT post frames the data network not as a budget-conscious process, but as a way of reconciling the economic, creative, and technological demands of a television production that also allows for human intuition and creative judgement.

In explaining the cultural, economic, and technological logic behind each part of the software that makes up the portal, Netflix builds an identity that balances the promises of technological novelty with the familiarity of easy-access entertainment. Netflix's algorithmic transparency troubles the "invisibility or naturalness of [the] mechanics" of datafication, with van Dijck and Poell writing that its "methods for aggregation and personalization are often proprietary and thus often inaccessible to public or private scrutiny" (2013, 10). Netflix embraces the accumulation and wielding of data, but re-frames its ability to do so as a form of social and technological empowerment. Nevertheless, controlling the narrative around personalization deflects attention away from the numbers that Netflix does not want to disclose, such as the entirety of its viewing figures, which allows the company to benefit from the virtue signalling of digital openness while avoiding uncomfortable ideological and economic questions around privacy, monitoring, or failure.

Notably, Ted Sarandos has used the privacy concerns that typically accompany any public discussions of big data to differentiate Netflix from other internet companies *and* other television content providers. On the topic of the hacking of collected private information that has occurred with Google and Facebook, Sarandos said "We don't collect your data. I don't know how old you are when you join Netflix. I don't know if you're black or white. We know your credit card, but that's just for payment and all that stuff is anonymized" (Sarandos quoted in Travers 2019). Sarandos argued that monetising user data through the buying and/or incorporating of advertisements was the main cause of privacy breaches, and thus, "another reason not to sell advertising" (quoted in Travers 2019). The advertising present in ad-supported networks factors in broad demographics (age, income-bracket, gender) and its accompanying content, and not private user data, but Netflix's lack of commercial advertising anywhere on its portal or interrupting its content, still sets it apart from its advertiser-friendly competitors.

As demonstrated, the NTB – like most of Netflix's communications – serves another discursive purpose. It produces an idea of Netflix as an innovator in the fields of streaming by using rhetoric that associates the Netflix platform and interface with personalization. It encourages the idea that Netflix's value is with its experience of intuitive user-friendliness rather than with any particular programming, original or otherwise. The NTB allows Netflix to not only heavily influence its own narrative, but also the public discourse around streaming technology and internet television more generally.

1.8 Internationalising Through Localising: The Datafication of Netflix's Digital Production

Netflix employs digital technology as a differentiation tactic and as a standardisation tool, particularly with regards to localisation. Localisation - "the process of creating compliant and culturally appropriate versions for international markets" (Pennington 2017) - is not new. Broadcast channels had discovered the profitability of localising content for overseas markets as early as the 1980s (Machin and Van Leeuwen 2007). Technological localisation practices are different from commissioning localisation practices. The latter entails the creation and production of the content itself, whereas the former involves the changes made to completed or existing content in post-production through dubbing and subtitling services. This section examines how Netflix uses technology to localise content for non-domestic markets.

Digital infrastructure is especially important for ensuring localisation because it comprises the linguistic, auditory, visual, and cultural translations that occur for the content in Netflix's catalogues to 'travel' in international markets. Linguistic and auditory translations refer to subtitling and dubbing post-production services, with visual translations denoting the algorithms responsible for Netflix's title designs and their visual functionality across the portal when rendered in multiple languages. Technological localisation increases the odds that subscribers will find a larger percentage of its catalogue appealing, which is important for Netflix because, “the amount of local content that’s actually visible to the user will depend on their past viewing behaviour and, indeed, the viewing patterns of other users” (Lobato 2018, 12).

The Netflix logo itself is written in “Netflix-sans”, a new font created especially for the company by data visualization design house, Venngage. Sara McGuire, its editor, provided an infographic that showed Netflix’s categorization of font types for Netflix original programmes, which each have specially designed typefaces intended to fit the show thematically, create memorability, and foster the recognisability of the Netflix brand.

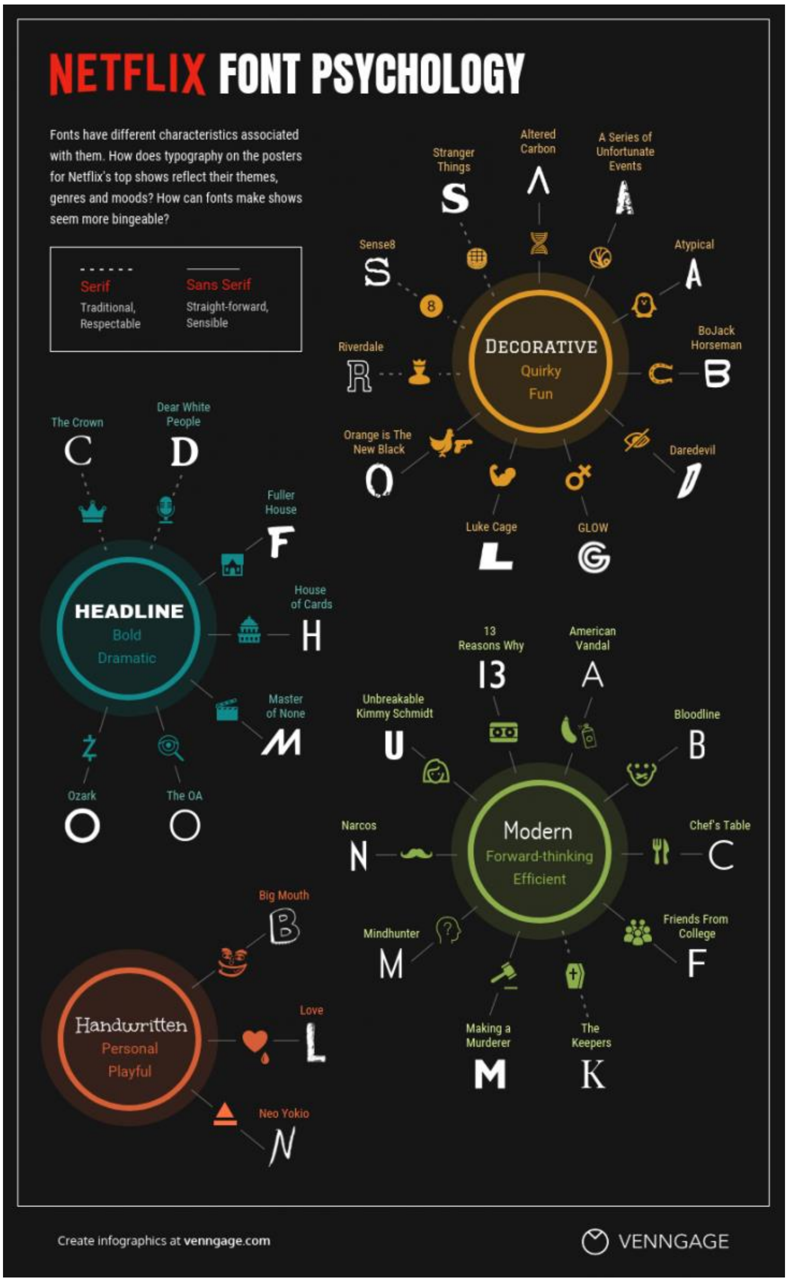

Fig. 12 (McGuire 2020)

Having exerted the effort of customising its originals' title credits, Netflix ensured that they would translate – quite literally – across international markets. The interpretation of the carefully conceived type fonts proved challenging in languages that do not use the Latin alphabet or Roman characters. To preserve its recognisability, Netflix outsourced the localisation of the title design to partnered local vendors, as shown in the Greek version of the *Altered Carbon* title font and the Japanese version of the *Stranger Things* title font.

Fig. 13 (Ellinas and Vakri 2018)

Fig. 14 (Barrett 2017)

When Netflix became available in 190 countries, it discovered that translating its 26 offered languages for an interface designed in English, for English, resulted in user difficulties, hindering the process of mutual domestication which relies on a user's continuous interactions with the portal (Brandall 2018). Netflix's portal needs to remain the same, irrespective of the country in which it is operating, but straightforward translations are often longer than the interface's space allows, creating the types of layout issues demonstrated below with the German translation of 'Don't Miss Out':

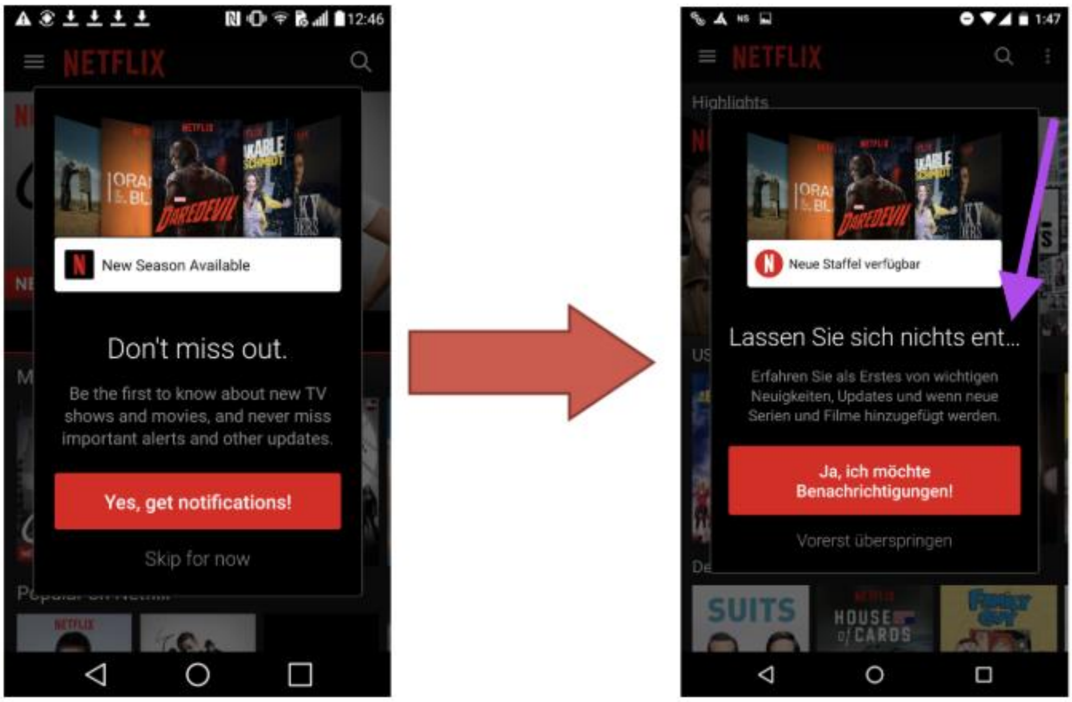

Fig. 15 (Brandall 2018)

To address the problem of globalizing its user interface, Netflix software engineers created a bespoke algorithm they called 'Pseudo Localization' (Brandall 2018). The algorithm is a "way to simulate translation of English UI strings, without waiting for, or going to the effort of doing real translation" (Brandall 2018). It the underlying architecture of the Netflix portal to remain readable to developers but approximates the size of whatever foreign language will be added in post-production with the help of translation vendors (Brandall 2018).

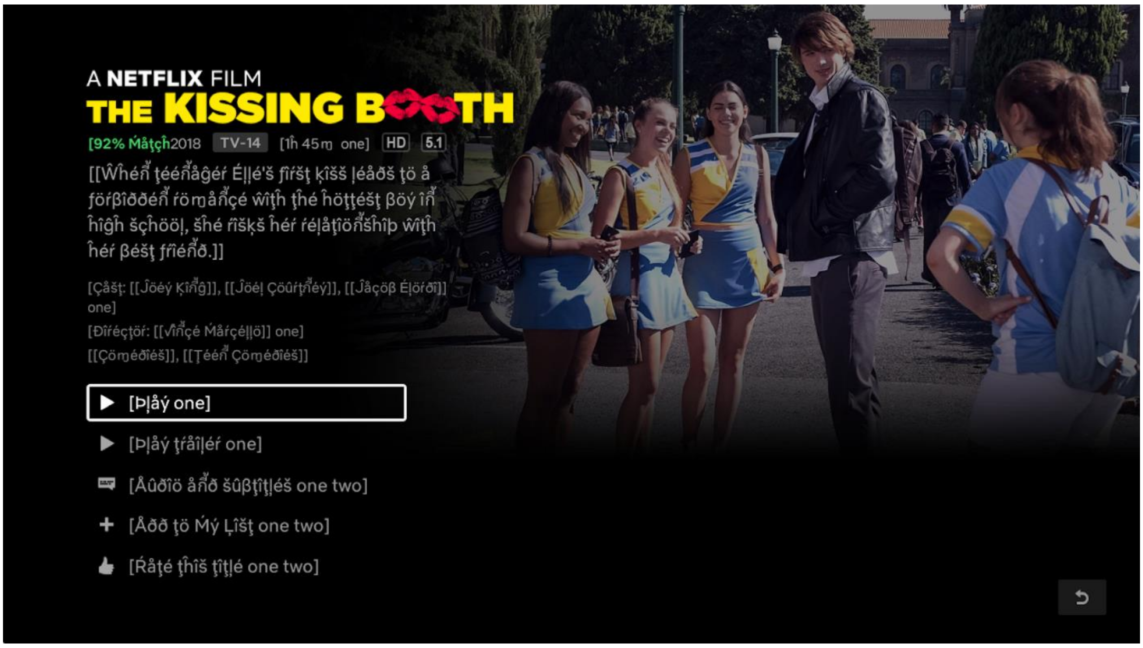

Fig. 16 (Brandall 2018)

In a bid to standardize production requirements between all of its digital partners, Netflix established the Netflix Post Partner Program (NP3), the Netflix Preferred Fulfilment Partner Program (NPFP), and the Netflix Post Technology Alliance (NPTA). Eligible NP3 vendors specialise in language dubbing, audio descriptions and subtitling, creative postproduction (colour-grading and audio-mixing), and master quality control, with a preliminary visual effects (VFX) affiliate directory available to VFX companies. NPFP vendors provide media fulfilment services and are also given strict services rates, expected timeframes, and performance metrics that are standardised and applicable to all vendors equally. The NPTA is for “manufacturers of products that generate or manage any kind of sound data, image data, or metadata from production through post” (pta.netflixstudios.com). While the NP3 focuses on “Netflix-commissioned postproduction workflows”, the NPFP partners work on “partner-commissioned content workflows” (np3.netflixstudios.com).

All three programs are worldwide partnership and certification initiatives that allow post-production venders to work with Netflix on a preferential basis (np3.netflixstudios.com). Vendors are invited to apply for their relevant program and are then put through a certification process that assess their competency and expertise, particularly in delivering each program’s Netflix-specific guidelines. If vendors are successfully accepted into one of the three programs, they are entitled to display a sanctioned ‘Netflix approved’ badge/logo in their official communications and received “a master service agreement, onboarding, vetting, testing, and training in Netflix workflows and applications”, as well as a direct point of contact with whom the vendors can liaise about upcoming opportunities (np3.netflixstudios.com). Netflix’s use of tiered rating systems and public association with ‘preferred vendors’ discursively propagandises NP3, NPTA, and the NPFP as an authoritative set of benchmarks, the legitimation of which also incentivises membership. On the NP3 website, preferred vendors in each speciality are listed alongside their Netflix-ascribed rank as either a gold, silver, or bronze vendor.

Fig. 17 (Hiventy 2020)

The programs exemplify Netflix’s attempts to create a distinctive ‘Netflix experience’ by applying uniform visual and auditory standards to the post-production of content in its catalogue. Each of them ensures uniformity of post-production processes such as colour-grading, dubbing, subtitling, and visual effects (VFX) across all of Netflix’s original commissions. This standardisation means that all of Netflix’s original content meets the same benchmarks of quality and localisation, whatever the differences in language, budget, bandwidth restrictions, or production studio.

Language services such as dubbing and subtitling are applicable to acquired and Netflix-originated content. Translation is an important consideration for the streamer and its localisation strategies. Around ninety percent of Netflix's international catalogue is comprised of foreign-language content, requiring effective post-production language services to maximise the content's reach across international markets (Clover 2020). Netflix's language localisation is contextual to the country's existing television industry and the cultural expectations of its viewers. Anglophonic nations generally prefer programming in English, as evidenced by Netflix's American, British, and Canadian catalogues which limit foreign-language content to between 10-40 percent (Beckwith 2019). Netflix's key European countries (outside of the U.K) of Germany, France, Italy, Spain, and the Nordic/Scandinavian bloc have established national networks that produce the majority of its local content. This means that Netflix's catalogue in these regions, as a foreign IDTV network, will contain a majority of foreign-language programmes (Clover 2020). However, cultural differences influence whether Netflix prioritises costly audio dubbing or the comparatively cheaper option of subtitling in a given market.

Nordic and Scandinavian countries have higher numbers of English-proficient citizens, allowing Netflix to eschew dubbing in favour of subtitling in Danish, Norwegian, Swedish, and Icelandic. Netflix prioritises dubbing in Germany, Italy, France, and Spain, where local viewers prefer content in their native languages, resulting in the dubbing of 60 percent of each country's catalogue (Advanced Television 2020). The expenses of such an undertaking might be considered worthwhile as German, French, Italian, and Spanish are also spoken in Latin American, African, Austrian, Swiss, Belgian, and Canadian territories, enabling Netflix to utilize the dubbed programming in those markets at no extra cost.

Dubbing and subtitling vendors provide these crucial localisation services by adhering to the guidelines laid out for them as part of the NP3 program. The NP3's parameters extend to punctuation, grammar, local dialect differences, the structuring of dialogue in fictional and non-fiction programming, as well as detailed advice about creating linguistic accuracy without infringing on narrative integrity, as demonstrated below:

Foreign Dialogue Treatment

- For the general guidelines on the treatment of foreign dialogue in subtitles and dubbing, please refer to the Timed Text Style Guides and Audio Style Guides.
- Foreign dialogues should be translated and dubbed/subbed only if plot-pertinent (usually with forced narratives).
  No need to add dub/subtitle events for dialogue that is non-plot-pertinent. Please refer to burned-in text documents and/or locked cuts with burned-in subs from your production representatives (if available) to confirm which foreign dialogue is intended to be understood.
- If the presence of the foreign language is intended to create a language barrier between the characters in the scene and the language used in the original version is the target language of the dub asset, please flag this instance to your Netflix Representative to discuss the best approach.

Accent Treatment in dubbing

- If the accent is discernible and pertinent (the subject of a joke, character arc, and/or plot development), please have the dubbing actor recreate it only if its applicable in the target language and if the accent can be performed as authentically and as nuanced as the original performance.

Fig. 18 Localisation best practices for features and series (Netflix Partner Help Centre 2020)

By solidifying its own instructions regarding subtitling, language dubbing, colour-grading, and other elements, through a partnership structure, and establishing a certification procedure that rewards vendors with the use of Netflix branding, the company is also creating a ‘Netflix standard’ across the post-production industries, which further entrenches the company’s self-mythologizing by extending this ‘standard’ into the professional sphere.

Netflix’s international presence permits the mobilisation of vendors across the globe for post-production services. Such decentralisation allows the company to extend its localisation strategy by using local language experts for accurate dubbing and subtitling, and importantly, enables Netflix to develop ongoing relationships with local vendors in various international markets. The creation of these long-term affiliations is beneficial for the streamer from the perspectives of content-production and industry authority as it also permits Netflix to establish itself as an important client within the professional post-production sector.

Netflix's increasing international commissioning has required it to partner with a growing number of local production studios. The company has the challenge of overseeing dozens of commissioned productions, occurring simultaneously in different countries, each with upwards of 100 crew members, many of whom have never worked together before, having to adhere to tight deadlines (NMC 2018). The problems of distance, time-zones, and communication between disparate teams exacerbate the inefficiencies of television production, which can result in delays that cause budget deficits. In response, Netflix developed an algorithm-based mobile application it called Prodicle Move (NMC 2018). Move launched at the end of 2017, debuting on the productions of Netflix originals *Glow* and *A Series of Unfortunate Events* (Roettgers 2018, NMC 2018). Move alleviates time-management problems by providing a standardised scheduling template that optimises the real-time sharing of information between all crew members. It is an organisation aid whose purpose is to improve efficiency at all levels of the production process, from the on-set schedule to post-production planning. Any production crew can use Prodicle Move, regardless of language or geographic location, widening its availability to all studios working on Netflix original commissions, both currently and in the future. The creation and implementation of Move demonstrates that Netflix intends to exploit its technological advantages outside of its interface and platform.

Move integrates incoming emails and messages and collates them into the shared Move drive (facilitated by Google drive) which then immediately alerts the *relevant* crew members to the update, including any side scripts, call sheets, and up-to-the-minute set information (Goss 2018). Move also aggregates the information sent to all crew members to compile a daily wrap report (Shankar 2018). The application assists the real-time planning and notification of daily on-set schedules, crew responsibilities, and shooting requirements (Roettgers 2018). Move's digitalisation is effective because film and television productions continue to rely primarily on physical paperwork to keep crew members abreast of the day's activities, and any sudden changes and/or additional production resources or requirements are communicated via a mix of emails, shared drives, and PDF files (Shankar 2018). The process of moving between them can be time-consuming and fractured, creating what

Netflix's director of studio technology Chris Goss has called an "administrative operational burden" (quoted in Shankar 2018).

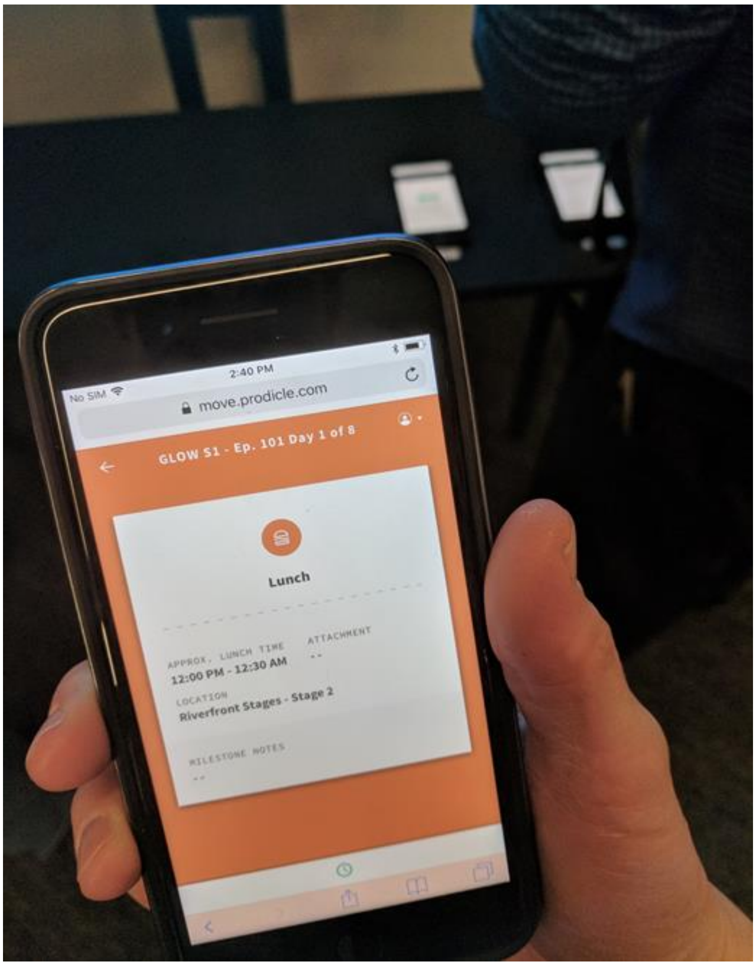

Fig. 19 An example of the Move interface (Janko Roettgers /*Variety,* 2019)

Move's centralisation also assists in faster communication in relation to vendors, security issues, and personnel supervision, all of which supports greater workflow efficiency. The benefit of approaching one main logistical issue – immediacy – is that it is both technologically viable and more likely to be successfully implemented by the on-the-ground production. Netflix appears to have been able to address the unusual diversity of industrial conditions for production crews, which frequently include independent contractors, freelancers, and talent, along with differing production experiences. Because production crews work together for a shorter period of time than other workplaces – three to six months – and are often working on different projects during the year, there is no time for the crew to become familiar with each other's professional preferences or to institute a blanket method of working (Roettgers 2018). Even if it was functional, an end-to-end system would require a massive culture shift in the way that screen productions occur. As Goss explains, "we'd have to go to those 800 people and say 'the way you did this yesterday, you're doing it this way today'" (NMC 2018). Furthermore, as Move is a single application, it is able to operate on most smartphone models, thus utilising an existing and widely accessible communications infrastructure (Shankar 2018). Netflix's aim with Prodicle Move was to create an application that "productions actually want to use" in order to encourage its wide-spread adoption across the studios creating Netflix originals (Shankar 2018).

What is notable about Move is its scope rather than its originality. Netflix itself has admitted that the notion of streamlining screen production processes is "not ground-breaking" (NMC 2018). Some software companies have tried to create end-to-end production software, but the scale of operational complexities has made the task impossible. As Goss explained, "all in ecosystems may work for smaller studios/production companies [but] the variables across our content slate makes it very difficult to successfully operationalize" (NMC 2018). Software companies with no experience in large-scale production considerations do not anticipate the difficulties of applying a monolithic software solution to multiple productions with varying shooting lengths, budgets, locations, and requirements. As both a software company and an increasingly international content originator, Netflix is incentivised to streamline the requirements of television production and has the resources to create timesaving and cost-saving digital applications (NMC 2018).

1.9 Conclusion

The importance of Netflix's rise to prominence is not that it has destroyed media convention but that the protocols it normalises are appropriated back by the industry and used to reinforce those conventions. Despite this, the culture of viewing – the 'regime' of television – has been substantially and permanently altered because of IDTV, with increasing saturation looking imminent due to the proliferation of the internet, smart devices, and convergence. Aiding this normalisation has been the continued representation of active viewers taking ownership over their media habits within advertising, press discourse, and even academia (Tryon, 2013, 65). Such press discourse serves to "naturalise new viewing platforms" while the functionality of the Netflix interface leads to a "transformation of the experiences and perceptions of movie and television viewers" (Tryon, 2013, 74). Through popular discussion, consumers are led to believe that they are 'freed' from the restrictions of the schedule and the fixed television set but are still able to retain their preferred viewing habits through the flexibility and choice of the IDTV platform. Netflix's iteration of IDTV demonstrates the potentials of digital media technologies as well as the possibilities of big data applications in the television industry, especially as to "how the different kinds of knowledge they produce affect existing cultural practices, including production practices" (Havens 2014). Moreover, the NBT, NP3 programs, and software such as Move add to Netflix's lore of 'data and algorithms' as a differentiating feature for the company. All are examples of the ways in which Netflix centralises and exploits its technological advantage for industrial and reputational reward as well as for localising and globalising its interface and brand.

Chapter Two: The Digitalisation of Viewership

2.1 Introduction

The chapter discusses the impacts of Netflix's viewership and engagement strategies on the company itself and the ripple effects across the television industry, with a focus on the American sector. It begins with an examination of Netflix's digital presence. Netflix's engagement strategy is noteworthy as it demonstrates the utility of social media promotion for television networks and is another avenue through which Netflix narratively differentiates itself as a brand rather than simply an IDTV provider, creating memes, viral moments, and hashtags that market the company in equal measure to its content. In addition, this chapter describes how Netflix relies on the datafication of content *and* of subscribers, using its portal to facilitate both. This chapter also discusses the idea of 'viewer control' to consider how the function of the Netflix portal, technologically and discursively, provides new opportunities to problematize ideas of viewer control and audience categorization.

The discursive creation of binge-watching expands on this chapter's argument that Netflix's rhetorical framing of itself as a provider of content and a facilitator of viewer control disguises the amount of power it holds over the choices available to the user. This control is demonstrated in the way that the company uses its interface to encourage uninterrupted episodic streaming, otherwise known as 'binge-watching'. This section uses the narrative around the 'Netflix Binge Scale' (promotion around which shows on the platform were the most 'binged') to highlight the ways in which Netflix tries to claim credit for inventing binge-watching. It concludes that, while the company has popularised the practice by providing a platform that purposefully facilitates continuous streaming, the desire to 'binge' media has existed (and been catered to) well before the inception of IDTV.

The next segment explains how Netflix drew on its algorithmic capabilities to categorize its subscribers into 'taste communities'. It uses several examples of the rhetoric around 'taste communities' which illustrate the potential for public mistrust, confusion, and failure of intent. It also examines how Netflix's constructing of and catering to taste communities has deviated from earlier strategies for the targeting and aggregation of audiences. The chapter concludes by discussing Netflix's selective ratings strategy and several prominent responses to it, including media criticism and the Nielsen company's attempts to quantify IDTV ratings. This section argues that Netflix uses selective and inflated viewing metrics to differentiate itself from competitors and make comparisons difficult.

#Popular: Social Media and the Differentiation of Netflix

Netflix's social media channels help to rhetorically mythologise the company as a non-traditional, label-defying content creator with a flexible IDTV brand identity. Netflix's social media accounts also deliver official information outside of the Netflix Media Centre and the Netflix Tech Blog. Social media have become a formidable source of user engagement, particularly for younger demographics, allowing companies to respond to individual users directly. As Netflix's messaging prizes individualization, its consistent and high-volume use of official accounts to engage and respond to users makes sense, especially with regards to targeting younger adult users whose exposure to Netflix through social media may familiarise them with the company, incentivise subscription, and provide regular reminders of value to reduce the potential for subscriber 'churn'. Engagement is attention, and attention is a driver of subscription renewal and thus a vital metric.

The 'relatable' method of professional social media interaction seeks to humanize corporate entities by encouraging para-social relationships between companies and consumers and disguising the companies' capitalist aims (Gil 2020, Strong 2015). Social media 'relatability' involves individualising and personalising a company, which is often accomplished when the company's social media handles use a in social media posts, employ (sometimes inappropriate) humour and jokes, and actively respond to individual users by commenting on and sharing their post (Martín-Quevedo, Fernández-Gómez and Segado-Boj 2019). Netflix was not the first corporation to use social media, but it was among the first television networks to utilise a strategy of relatability, and as a result, has become the most successful subscriber funded IDTV provider on social media. To illustrate this success, Netflix US has 8.4 million twitter followers (versus Amazon Prime Video's 1.6 million) and 23 million Instagram followers (versus HBO's 3.7 million and Disney +'s 3.1 million). American networks CBS, NBC, and ABC each average less than one million Instagram followers and less than two million each on Twitter, with a preference for promoting soon-to-air content to potentially boost viewership during a show's scheduled timeslot (Beer 2019). On average, Netflix posts content in the form of tweets, links, memes, jokes, or milestones every 3 and a half hours, and its average engagement rates comfortably surpass IDTV rivals Amazon Prime and Hulu, whose typical content consists of promotional material such as trailers (Ramakrishnan 2019). The conventional approach taken by NBC, Showtime, and others, is typically the riskless posting of short trailers, clips, or promotional stills, with an accompanying short message about "tuning in" for an upcoming episode. Although youth-oriented 'relatable' social media branding is becoming increasingly common, few other networks have employed it as consistently across the range and international scope of their accounts as Netflix, which is reflected in their follower and engagement numbers.

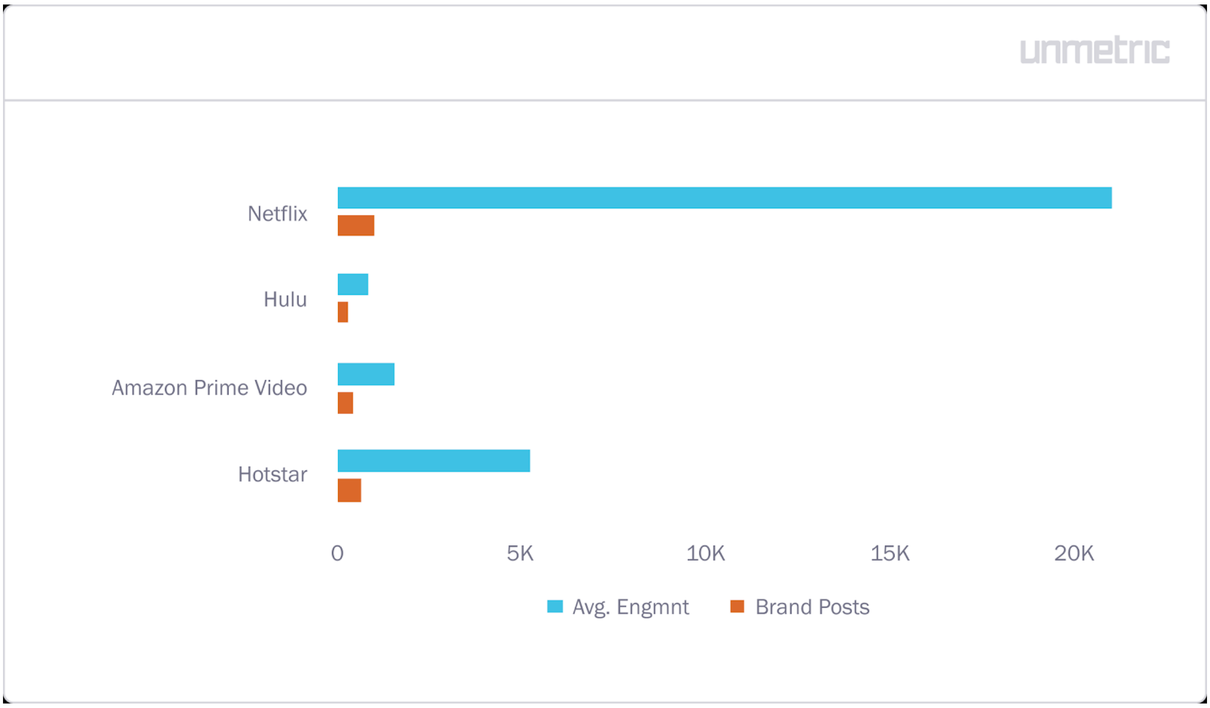

Fig. 20 (*Unmetric* 2019)

In line with strategies of relatability, Netflix's official accounts are almost primarily made up of memes, gifs, and emojis and employ humour regularly. One marketing study of the content posted across Netflix's Instagram and twitter accounts identified that 40 percent of posts on its Instagram had the primary intention of being humorous, compared to almost 37 percent of tweets on Twitter (not accounting for content whose main intention was to be informative but may have also been humorous as a secondary intention) with zero percent intended as a 'call to action' (CTA):

Table 3: Intention of content posted on Twitter

	US
Inform	61,1%
Humor	36,7%
CTA	2,2%

Table 4: Intention of content posted on Instagram

	US
Inform	60%
Humor	40%
CTA	0%

Fig. 21 (Perez 2020)

Using a first-person writing style, casual tone and use of humour, Netflix accounts release tweets that poke fun at the binge-watching behaviour it encourages, routinely creates and shares memes of its own content, and uses youth lingo to promote its shows and the actors that populate them.

Fig. 22 (twitter/NetflixUS 2017)

Fig. 23 (twitter/NetflixUK&Ireland 2019)

Fig. 24 (twitter\NetflixIndia 2020)

These tweets from the Netflix official twitter accounts for the US, the UK and Ireland, and India demonstrate the maintenance of its causal tone across the English-language accounts. This cohesion carries into Netflix's Instagram page, which uses casual, vernacular language in its captions to suggest that the page is more like a fan account and less like a highly managed and deliberate corporate marketing strategy, which it undoubtedly is.

Fig. 25 (Instagram.com/NetflixUS)

Fig. 26 (Instagram.com/NetflixUS)

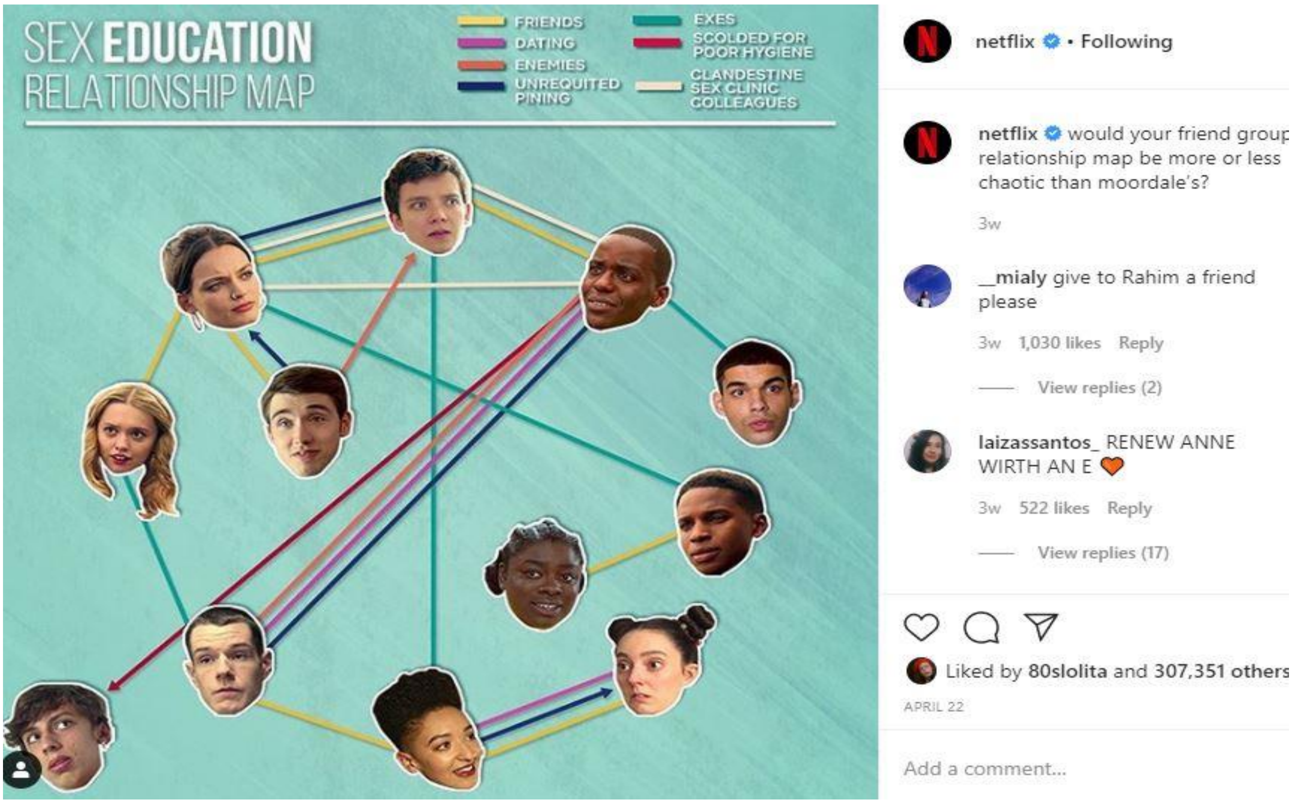

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Fig. 27 (Instagram.com/NetflixUS)

Netflix promotes brand identification by associating itself with youth culture, pop jargon, and its cast of up-and-coming stars. Media outlets began noticing that young actors who appeared in Netflix originals were developing large worldwide fanbases in short periods of time, crediting Netflix's worldwide simultaneous release model for the phenomenon they have dubbed "Netflix famous" (Bereznak 2018, Clark 2018). Ted Sarandos acknowledged the phenomenon when he used the huge spike in social media followers for Netflix affiliated actors as evidence of cultural popularity for shareholders in an earnings report for October 2018 (*CNBC* 2018). An indicative claim from this report is Sarandos's hyperbolic contention that, "when our service helps our talent develop huge fan bases (from small followings to over 10 million Instagram followers), we can attract the best talent in the world. This explosive growth in popularity is a good indicator that our shows and stars are breaking out around the planet" (Sarandos quoted in *CNBC* 2018).

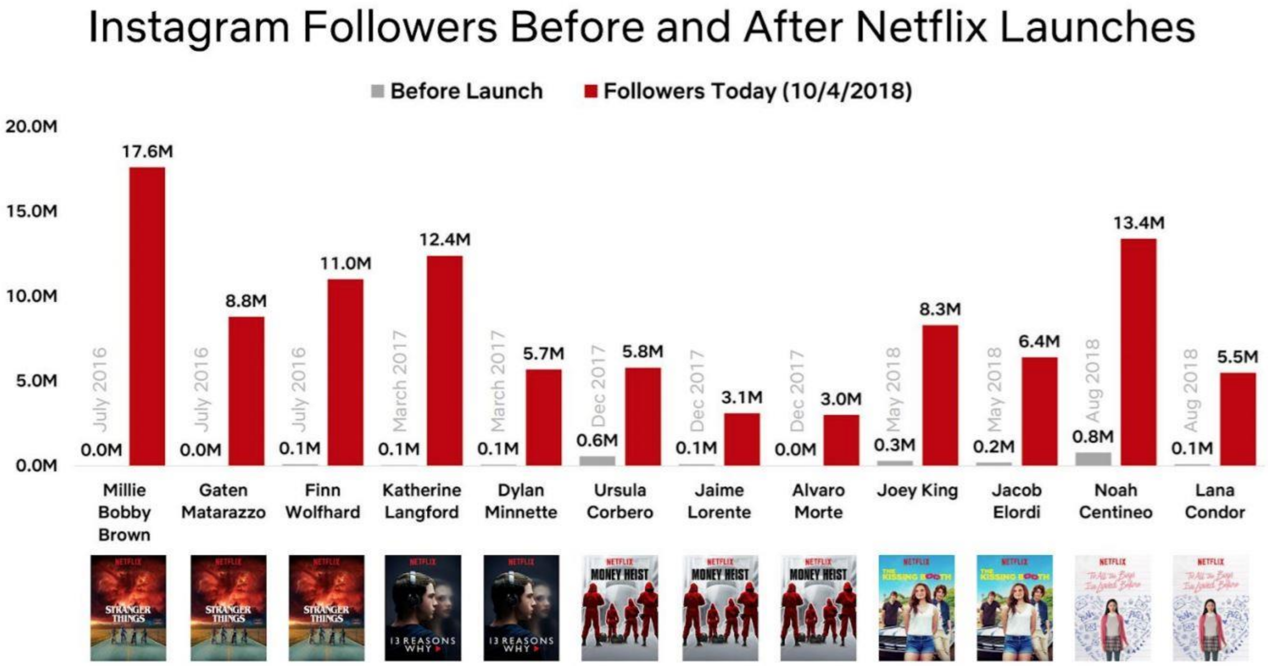

Fig. 28 (Salinas *CNBC* 2018)

Netflix's social media marketing and customer engagement strategy allows it to exercise control over its narrative and re-affirm its brand identity as one that is unusually digitally savvy. Independent accounts are also saturating the digital landscape with Netflix related content, which is exemplified through the organic creation and circulation of memes by social media users. Each time a user engages with a meme or tweet, they are 'actively' participating in an advertising process. Yet, because of the interaction takes place over social media, the advertisement seems less like deliberate marketing and more like an extension of the active control that is part of Netflix's selling point. The function of these forms of spreadable media (Jenkins, Ford, and Green 2013) is that is they allow the company to capitalise on the cultural caches (and 'memability') of Netflix-acquired content, effectively giving them even more free marketing on content they did not create.

When Netflix was nominated in the social media category of the 2016 Shorty Awards, the company described itself as "entertainment's biggest fan", explaining that it discusses content "on social media just like any other obsessed, stream freak super-fan" (Shorty Awards 2016). The first-person framing of corporate social media accounts as 'fandom' is a humanizing tactic. This framing was extended to the 2019 release of Netflix's *Queue Journal*.

Queue is a publication that contains interviews and photoshoots with the actors, producers, and writers of Netflix originals. *Queue*'s official Instagram tagline is "paying homage to the people, the ideas, and the process of creating great entertainment on @Netflix and beyond". *Queue* was conceived as a "callback to Netflix's origins and a way for readers to connect with the brand in the future" (*Communication Arts* 2019). It ostensibly exists to self-mythologize the company as a content creator, despite Netflix's ongoing reliance on a supply of shows acquired from other networks, in order to cultivate and encourage a 'fandom', an intent implied by its content, tagline, social media presence, and the conditions around its availability. *Queue* is only accessible in physical form, is exclusive to US-based subscribers, and is delivered (free of charge) to anyone who enters their details and physical addresses on the *Queue* website. The journal is very much an extension of the 'Netflix experience' discussed in chapter one. *Queue*'s designers state this as an outright aim, saying their challenge was to "extend the Netflix experience to a journal that would engage audiences and showcase talent in a way that felt true to the brand" (Hayman and Oberman 2019). Its design incorporates the specific shades that dominate Netflix's marketing (red, black, and white) and *Queue* features only those actors, producers, and writers involved in Netflix-originated content. It features behind-the-scenes photographs, cast portraits, and interviews with the aim of modernising the look and feel of "classic movie magazine of the 1950s and 1960s" in order to "encourage and inform the conversation" its readers (and Netflix viewers) are having (Hayman and Oberman 2019).

Fig. 29 (*Queue* 2019)

Fig. 30 (*Queue* 2019)

Fig. 31 (*Queue* 2019)

However, *Queue*'s other (perhaps more relevant) function is as a self-promotional tool aimed at industry professionals (Shaw 2019). Excerpts of the first issue, which reportedly contained over 100 pages of content, were released publicly in August 2019 (Crucchiola 2019). However, full versions of the inaugural publication had been distributed to members of the Academy of Television Arts and Scientists at Netflix's Emmy Awards campaign events in June, when voting for the awards commenced (Feinberg 2019). Targeting this specific demographic allows Netflix to boast about its working relationships with high-profile writers, directors, producers, and actors, which also serves as covert job advertising for the company, and selectively showcases Netflix originals to eligible American Film and Television awards voters.

Netflix's social media marketing strategies are consistent efforts at differentiating the company as a unique entity within the television industry, an IDTV brand whose youth and humour (relative to older networks with less millennial influenced branding) mirror the supposed freshness of its internet origins. Netflix's distinctiveness as an IDTV service provides it with the ambiguity necessary to market itself as an amorphous entertainment company. The streamer can take advantage of a digital space in which it can simultaneously be a television network, a content distributor, and a software company, without limiting itself to any one of those labels. This flexibility allows it to benefit from the cultural capital of an ostensibly youth skewing social media presence without suffering the brand dissonance that an older, conservative, or reputationally rigid network might if it tried to cater to social media savvy younger demographics.

2.3 The Datafication of Audiences

Television networks continue to battle the issue of how best to capture, retain, and categorize, and satisfy their viewers. Ien Ang observes that audiences represent a "problem of institutional reproduction" which, in linear television, is rooted in a perceived lack of control for audiences (1991, 14). Though she was writing at a time when linear television had few alternatives, Ang suggests that the issue of control would continue to affect the medium as it evolved. The success of the audio-visual industries is dependent on incentivising viewers to continue their consumption of content. As Ang points out, many of broadcast television's most well-known practices were the result of a deliberate strategy to safeguard its profitability by capturing and retaining the attention of audiences (1991, 17). On the development of formats, genres, and scheduling, Ang writes:

> These strategies do not only serve as a way to facilitate the organization and coordination of the industry's production practices, but are also aimed at the codification, routinization and synchronization of the audiences' viewing practices (1991, 15)

The logic of scheduling and flow, the use of TV guides, the promotion of shows and their stars through interviews, the creation of catchy theme songs, and the focus on 'demographic thinking', all came into being as strategies designed to entice, maximise and retain audiences. The television industry utilised the tools at its disposal to attempt to conceptualise and construct audiences. It identified, aggregated, and counted them (in accordance with their age, gender, and income) and assigned them common characteristics. Networks then used the results of audience measurement systems as the basis for the assumptions that would fuel commissioning and content decisions for decades (Ang 1991, Arnold 2016). Thus, audiences became paradoxical for both scholars and industry professionals; audiences were unknowable, yet their viewing habits were constantly surveyed and assessed.

Viewers have slowly gained control over the temporal restrictions upon TV content through emerging technologies like the VCR, TiVo, and now, IDTV portals. Yet, there are impactful and enduring differences between the recording technologies of the VCR and DVR, and IDTV. Netflix's portal is, of course, not merely a tool to be wielded by consumers (like the VCR or DVR). Netflix's interface bridges the space between television providers and viewers in a new way. It is an algorithm powered delivery system that gives its subscribers the possibility of governance over the entirety of their viewing experience, even creating new conveniences that have the secondary benefit of providing customers with additional features that they can control. These features include technological and temporal enhancements, such as the option to shuffle episodes of select non-serialised sitcoms, download episodes for offline viewing and the 'skip forward by 10 seconds' button, but recently the company has experimented with interactive content for a handful of Netflix-commissioned programmes where viewers make choices that impact the episode's narrative (Rubin 2019). As of 2020, there have been three titles aimed at adults (*Black Mirror: Bandersnatch, Kimmy vs the Reverend,* and *You vs Wild)* and six aimed at children (Netflix Help Centre 2020). These features are novel avenues for viewer control, and, whether or not subscribers exercise their ability to choose, skip, download, or dismiss, their personalised Netflix account will learn from their actions and tailor their Netflix experience accordingly. Jenner notices that an increase in control for audiences is not an equivalent increase in power, instead terming the use of pre-Netflix time shifting capabilities by viewers as "disruptions" (2018, 42). Conceptualising the interconnection between the complex groups within 'viewers' and 'the industry' as disruptions allows scholars to recognise the way that dominant agents (largely established television companies) reassert their hegemony despite the presence of viewer-oriented technology. As these power dynamics are propelled by existing systemic profit incentives for television networks, any seemingly audience empowering apparatus created within the confines of that system work to sustain the end goals of the existing incumbents, which is profit. Subscribers may not have as much control as Netflix's promotional material leads them to expect, but the streamer's improved machine learning has enabled options for viewer decision-making that did not previously exist. Consequently, subscribers can also learn from their own interactions with the interface. Their familiarity with Netflix's portal, and the user-friendliness that incentivises them to return and acquaint themselves with its features, enacts anew the "routinization and synchronization of the audiences' viewing practices" (Ang, 199, 15). At the network end, Netflix is paying attention. In return for the control it provides through the datafication of content, the streamer gains greater control in the form of the datafication of the audience.

The datafication of content refers to the way that Netflix employs its subscriber data to invent and upgrade features that compensate for the temporal restrictions of B/C/S networks without IDTV services. Using internet technologies, Netflix created, and then took advantage of, non-linearity to create the "Netflix catalogue" (Lobato, 2019). To try and exploit these opportunities, the company commissioned content specifically for its non-linear service, such as the aforementioned *Black Mirror: Bandersnatch*. Netflix original programmes are released in completed seasons and are not dependent on US television's traditional Fall/Autumn premiere schedule. This premiere scheduling began as an institutional holdover from radio and was maintained because it routinized production schedules across all networks and provided regularity for advertisers and networks to pitch and finance new programming. While Netflix's release dates for new programmes and seasons are more flexible than those of networks with linear channels, it remains beholden to the schedules of its production partners who must account for the deadlines set by the timetables of long-established networks. Time-slot commissioning strategies such as tent-poling, prime time evening dramas, and pre-news sitcoms, are not relevant to internet distributed television, though they continue to act as crucial organising tactics for schedule focused programming. Catalogue content, which caters to a consumption mode that already provides user-directed functionality on its own, gives viewers the closest approximation of direct control that they have ever had.

The datafication of audiences is Netflix's contribution to the toolkit of attention measurement (Arnold, 2016, 52). The television industry is heavily invested in gathering as much quantifiable data about viewers as possible because it uses this data to attract the advertiser funding required to proceed with a new programme, as well to justify the cost of their content to existing and potential advertisers (Gunter, 2000, 116). As described by Jhally and Livant, "when [commercial television stations] 'sell time' to a sponsor, it is not abstract time that is being sold but the time of particular audiences", and this 'watching time' is produced by networks and viewers (1986, 130). Additionally, viewer information assists networks and advertisers with the selection of the best timeslots for maximum viewership and can be useful in decision making about the commissioning and cancellation of types of genres and formats. As Arnold notes, the industry's audience measurement tools have endeavoured to "negotiate volume with value", balancing an overview of the mass audience with the engagements and preferences of individual viewers (2016, 52). Netflix's datafication methods reduce these limits. Netflix can measure its subscribers' every engagement with its service and its content, acquired or original, in real time. As Netflix does not have advertisements, its measurement capabilities are used to enhance portal attributes that deliver conventionality or novelty, active searching or relaxed scrolling, depending on the user's viewing history, the device they are using, and the time of day they are watching. Netflix does not sell its viewers' 'watching time' to advertisers, but this time is valuable nonetheless, as its elicitation and categorization helps the company to make decisions about the commissioning and delivery of its programming.

Attributes that encourage the playback of Netflix content are also ones that alleviate viewer labour or minimize the actions necessary for a viewer's active participation. Examples include the function of an episode resuming from a moment a viewer has exited it, regardless of how long ago the episode was watched, and similarly, being able to seamlessly transition from viewing an episode from one device to viewing it on another. Other attributes include providing viewers the option of viewing a pre-selected list of 'most popular' episodes of a widely viewed series or recommending shorter (or partially viewed) episodes of a show if a subscriber opens the portal in the middle of the night (Burgess 2018). Attributes that represent novelty and active searching are ones that originated on, or were popularised by Netflix, such as sending programme related push notifications, reminders, and personally tailoring recommendations, which inspire further mutual domestication as subscribers are 'taught' how to be "ideal consumers" of the service (Siles et al, 2019, 2).

Netflix's capabilities trouble many of the generalised assumptions about audiences which resulted from the limited audience research methods available before IDTV. While Peoplemeter ratings measurements remain a useful and necessary part of ad-funded television, as Ang explains, the judgements about audiences that are generated by Nielsen boxes and sample viewers become norms, based on the supposition that audiences are static and definable (Arnold 2016, Gunter 2010, Ang 1991). Netflix's datafication of subscribers provides unparalleled accuracy and this reveals the paradox of a 'knowable audience'. By offering alternatives to existing judgements made about viewers, Netflix's access to precise information reaffirms the industry's belief that audiences are knowable rather than simply measurable. However, for academics, the breadth of individual data and the new modes of consumption it facilitates is a reminder that one set of suppositions about audiences should not be substituted for another.

Netflix's data gathering capabilities are informed by the company's subjective pursuit of enhanced genre categorisation and algorithmic utility. Because Netflix is invested in maximising the accuracy of its recommendations, the more a user engages with the portal, the more Netflix's own notions about its viewership are strengthened (Arnold 58). Users may exercise their options for 'control' by adding content to their 'watch later' list or rating a programme positively or negatively, but this intention-driven data is considered less valuable by the company than the figures tracking exactly how and what users actually watch. Netflix's Vice-President for Innovation Carlos Gomez-Uribe and Chief Product Officer Neil Hunt commented that "what customers ask for….and what actually works are very different" (2015, 8). The aspirational viewing preferences of subscribers are not helpful for Netflix unless they translate into definite viewing habits. Its business model measures customer satisfaction by "valued hours" which refer to the amount of time subscribers watch content on the service proportional to their overall viewing time (Hunt quoted in Nowak 2016). Hunt explains:

> Somebody who doesn't watch very much presumably puts more value on the hours they do watch than someone who's watching a hundred hours a month. We're able to measure the contribution of valued hours in a way that matches well to the business value of how it attracts your attention and the economic value of that customer. (*Canadian Business* 2016)

Hunt's statement is a reminder that Netflix's ultimate goal is to remain profitable using the same logic as its television industry rivals have for decades prior, that being the monetising of viewer attention. Netflix's digitalisation of viewership affirms the assertion that, for television providers, "watching time is the mode of expression of value" (Jhally and Livant 1986, 127). While the disruptions of Netflix's IDTV service have been appropriated to the point of normalcy by the industry at large, its audience related offerings reinforce the validity of Ang's point that the search for control (for viewers and over them) has long been tied to the experience of television.

2.4 Binge-Watching

Binge-watching has become something of a catchall term in press discourse, encompassing the nuanced and varied "cultures of use" enabled by IDTV (Turner 2019). Netflix's rhetorical framing of itself as a provider of content and a facilitator of viewer control disguises the amount of power it holds over the choices available to the user. This control is demonstrated in the way that the company uses its interface to encourage uninterrupted episodic streaming – otherwise known as 'binge-watching'. It uses features like thumbnails, trailers, descriptions, and percentage matches to capture audience attention before a text is chosen, providing a selection of 'most likely' content on the user's homepage, as well as a reminder of what the user has placed on their individual 'my list' and a series of 'best matches' from the most recently viewed micro-genres of the user. After a selection has been made, at the conclusion of an episode or series, the end credits are minimised, and an auto-play function counts down to the following episode, or a similar text will appear on the screen with a suggestion to "watch next". The interface serves a dual function. It places the algorithmic recommendation system front and centre, which differentiates Netflix from linear TV services by allowing the user to feel as though their individual taste is being acknowledged and catered for. It also permits Netflix a degree of control over the content it wants subscribers to view first, including its own commissioned programming, in a way that recalls some of the objectives of a traditional channel schedule (Arnold, 2016, 51). The streamer's interface creates and then exploits a spectrum between conventionality and novelty. This spectrum re-packages viewer familiarity with existing multi-episode programming and viewing practices (through television omnibuses and DVD boxsets) as 'binge-watching' by offering subscribers the novelties of individual control and flexibility and a sense of personalisation.

An example of such discourse was the "Netflix binge scale" (*NMC* 2016). The scale was the result of a Netflix-conducted study that analysed subscriber completion rates in all of Netflix's 190 countries, for the first season of 100 serialised programmes on the platform, over a seven-month period between 2015-2016 (*NMC/*Dwyer 2016). The study's results found that the "most-devoured" shows were horrors and thrillers, which, as Netflix publicity asserted offered "high-energy narratives" that "assaulted your senses", as well as "comedies with a dramatic bent" which, the company claimed, were able to "tickle our fancy and make it easier to say, 'just one more'" (NMC/Dwyer 2016). On the opposite end of the scale, the least watched shows were political and historical dramas and irreverent comedies. Netflix spokespeople said that it was "no surprise that complex narratives, like that of *House of Cards* and *Bloodline*, are indulged at an unhurried pace. Nor that viewers take care to appreciate the details of dramas set in bygone eras, like *Peaky Blinders* and *Mad Men"* (NMC/Dwyer 2016). For comedies like *Bojack Horseman* and *Arrested Development*, Netflix claimed that "societal commentary…densely layered comedy…and characters that are as flawed as they are entertaining" contributed to their slower pace of consumption (NMC/Dwyer 2016).

Fig. 32 (*Netflix Media Centre*, 2016)

These findings were presented in a way that enabled Netflix to claim credit for popularising binge-watching (an untruth) while simultaneously praising its IDTV portal for facilitating slow, deliberate viewing. In the press release for the scale, Netflix VP of Original Content, Cindy Holland, emphasised that Netflix members were "making their own rules when it comes to watching TV" (NMC 2016). She paid lip-service to the binge-watching practice ("binge-watching is clearly the new normal") before emphasising the importance of viewer control, saying:

> Netflix helps you to find a series to binge no matter your mood or occasion, and the freedom to watch that series at your own pace – whether that's to appreciate the drama of *Bloodline* or power through *Orange is the New Black* (NMC 2016).

The choice of a scale itself demonstrates Netflix's intention to show the variety of consumption and content choices available within the 'Netflix experience'. Its international framing also helps the company portray itself as a provider that values subscriber agency and control, from which all of its worldwide customers could find and create a viewing experience personalized to their own preferences and "cultures of use" (Turner 2019).

Another important distinction of Netflix's delivery was the decision to make the full season of a Netflix-commissioned programme available for immediate viewing on its release date. This stipulation applies to the majority of Netflix originals but windowing practices still apply for some significant examples. New programmes, such as co-productions or shows whose streaming rights have been exclusively acquired by Netflix, typically follow a weekly release schedule whereby episodes air first on the partner or originating network before being made available on Netflix. The decision to do full-season drops was made after the company conducted its own study into the relationship between the first episode of a multi-episode show and viewer retention.

In 2015, Netflix compiled an analysis of its worldwide viewership measured against the first season of the most popular programmes in its catalogue. It discovered that the pilot was rarely ever the "hooked episode", a term the company used to refer to the episode from which 70 percent of viewers went on to watch the rest of the first season (Sund and Dwyer

2015). Netflix produced an infographic to indicate the number of 'hooked' episodes for the following dramas and comedies which include a combination of commissioned and acquired shows:

Fig. 33 (*Netflix Media Centre* 2015)

In accordance with the findings of the analysis, the requirement for a speculative pilot episode was removed (Wittmer 2018). Sarandos' comments on the decision contrasted Netflix against broadcast and cable networks, saying "given the precious nature of primetime slots on traditional TV, a series pilot is arguably the most important point in the life of the show… [H]owever, in our research of more than 20 shows across 16 markets, we found that no-one was ever hooked on the pilot" (Sarandos quoted in Sund and Dwyer 2015). Sarandos added that this research gave "us confidence that giving our members all episodes at once is more aligned with how fans are made", a statement that typifies the company's self-mythologizing as a network with unusual access to viewers because of its interface and its use of data (Sarandos quoted in Sund and Dywer 2015). There is evidence to suggest that Netflix's 'no pilot' strategy has been influential enough that some of America's largest networks have forgone the pilot process in favour of more straight-to-series orders (Wittmer 2018). One study found that the number of pilots ordered among the United States' major broadcast networks (including ABC, NBC, and CBS) decreased by 33 percent between 2015-2018 (Wittmer 2018).

While there has been no direct correlation between this statistic and Netflix, multiple news outlets have credited the streamer with demonstrating the benefits of forgoing pilots. *Business Insider* claimed that "TV networks are mirroring Netflix by ordering fewer pilots" (Wittmer 2018) while *The Independent* wrote that "the pilot is dead" in response to Netflix's 'hooked episode' research (Hooton 2015). *Variety* reported that 2019's pilot season has the lowest recorded number of pilots since 2012, citing agency sources that blame the decrease on a strategic effort by broadcast and cable networks to "be more targeted in deploying their resources to counter the deep pockets of cable and streaming platforms like Netflix" (Otterson 2019). Although the trend is likely the result of many interrelated institutional and economic factors (to which Netflix has contributed), the press's attribution of such changes to the streamer suggests that its attempts at mythologizing itself as an 'innovator' have been successful.

The desire to 'binge' media is not unique to IDTV. The appeal for continuous and viewer-controlled media has been evident in the consumption of books, and later, music, but the rise of IDTV and notably Netflix, which deployed 'binge viewing' in its marketing, can be credited with mainstreaming this practice for television programmes. Much the same as it achieved when confined to VCR and DVR technologies, binge-watching can encourage a range of "cultures of use" and habits that enable a mixture of active and passive viewing practices (Turner 2019). Additionally, Netflix creates a link between the time-shifting enabled by DVRs and DVD box sets and the practice of binge-watching, perpetuating the concept of a 'binge-worthy' series as a marker of its relative value (Jenner 2018). DVD box sets had garnered a reputation for expanding the possible options of the discerning viewer as they allowed fans to enjoy a series in its most "textually pure" state (Jenner, 2018, 144). Jenner argues that DVD box sets helped to popularise and solidify the notion that television texts could be experienced as seasons rather than as individual episodes (2018, 143). Binge-watching differs conceptually from previous time-shifting technology because it originates from streaming-capable platforms. Additionally, earlier recording technology was able to capture content made for broadcast or cable networks, meaning that the content itself included the mandatory commercial breaks or story beats necessary for weekly delivery.

The consistency between temporal control, multi-episode viewing, re-watchability and the season-long story created perfect conditions for the flourishing of binge-watching. Netflix was able to normalise the conditions of binge-watching through its portal and its original productions which helped it to accomplish two things. First, it was able to move binge-watching from the periphery of television production and consumption to the centre. Secondly, it could benefit from the linkages with 'discerned viewing' that DVDs had fostered to imbue a 'binge' mode of viewing with the legitimacy of 'high-end TV', and by association (as the first to attain a binge-watching potential) Netflix's commissioned shows. Binge-watching reflects the rise of content made specifically for streaming platforms (for bingeing and viewers who are increasingly adapting to the creative and technological opportunities of streamed television.

2.5 Taste Communities

In 2018, Netflix's VP of original series, Cindy Holland, was asked about the role of demographics in Netflix's decision making. She responded that "demographics aren't a good indicator of what people like to watch", explaining instead that Netflix's data scientists had created a proprietary algorithm that identified "taste communities" (Holland quoted in NG 2018). This business strategy refers to "like-minded fan communities" with similar tastes, a classification that helps Holland and her team make commissioning decisions based on the number of viewers that are likely to watch a programme, thereby justifying its cost (Holland quoted in Lynch 2018). Taste communities are created by pairing Netflix's custom-collated micro-genres (of which there are tens of thousands) with the viewing histories of its subscribers (of which there are tens of millions). The result is over 2000 separate taste communities, with subscribers comprising multiple such communities at a time.

The impetus for taste communities was motivated by the company's need to create better ways of capturing and retaining viewer interest immediately after they open the Netflix portal. In 2016, Netflix engineers discovered that the portal had a 60-90 second window of time for a subscriber to begin watching content before they grew bored and exited the platform (Stenovec 2016). Netflix's VP of Product Innovation Carlos Gomez-Uribe explained that, "knowing that we have 60 to 90 seconds to help you find something great, it is our goal to develop the most personalized experience as possible, based on your unique preferences and tastes, so we can surface the titles you will enjoy as fast as possible" (quoted in Stenovec 2016). Within that window, subscribers spend an average of 1.8 seconds inspecting thumbnails (which make up 82 percent of their focus while on the portal) meaning that minute data-informed advantages can have major implications for subscriber retention and satisfaction (Nelson 2016). An example of this feature in action are the 'popular on Netflix' and 'currently trending' selections, which both highlight content that is trending only within that subscriber's taste communities rather than throughout Netflix's larger subscribership.

Initially, Netflix used its Marvel collaborations as trial programmes for the development of taste communities. Through a combination of A/B testing, data, and machine learning, the streamer was able to create taste community profiles based around viewers of *Jessica Jones*, *Daredevil*, *Iron Fist*, and *Luke Cage* (Watercutter 2017).

Fig. 34 (*Wired* 2017)

According to the infographic above, *Iron Fist* viewers are part of the 'coming-of-age tales' taste community. Also in that profile are three Netflix original shows (*13 Reasons Why*, *Love*, and *Grace and Frankie*) and one acquired show (*Shameless*). Even with its abundance of data, Netflix has not provided exact explanations for the effectiveness of its pairings. For instance, the notion of 'taste community' explains why a large number of *Grace and Frankie* viewers have also watched *Iron Fist* (something Netflix has confirmed, without providing contextualising numbers) but it does not account for why the "top lead-in" for *Iron Fist* was (at the time of its release) a Dave Chapelle comedy special (Watercutter 2017). Netflix VP of

Product Todd Yellin explained, “take someone like my 75-year-old mother-in-law, who enjoys *Grace and Frankie*. Are we going to necessarily suggest *Iron Fist* to her? Absolutely not. But there is going to be a subset of people it appeals to, so we have to get smart about which people” (quoted in *Wired* 2017). Netflix was then able to test the accuracy of its taste community profiles by applying the proprietary algorithm used to create them to *The Defenders,* which stars all the characters of the preceding Marvel/Netflix superhero programmes (Watercutter 2017).

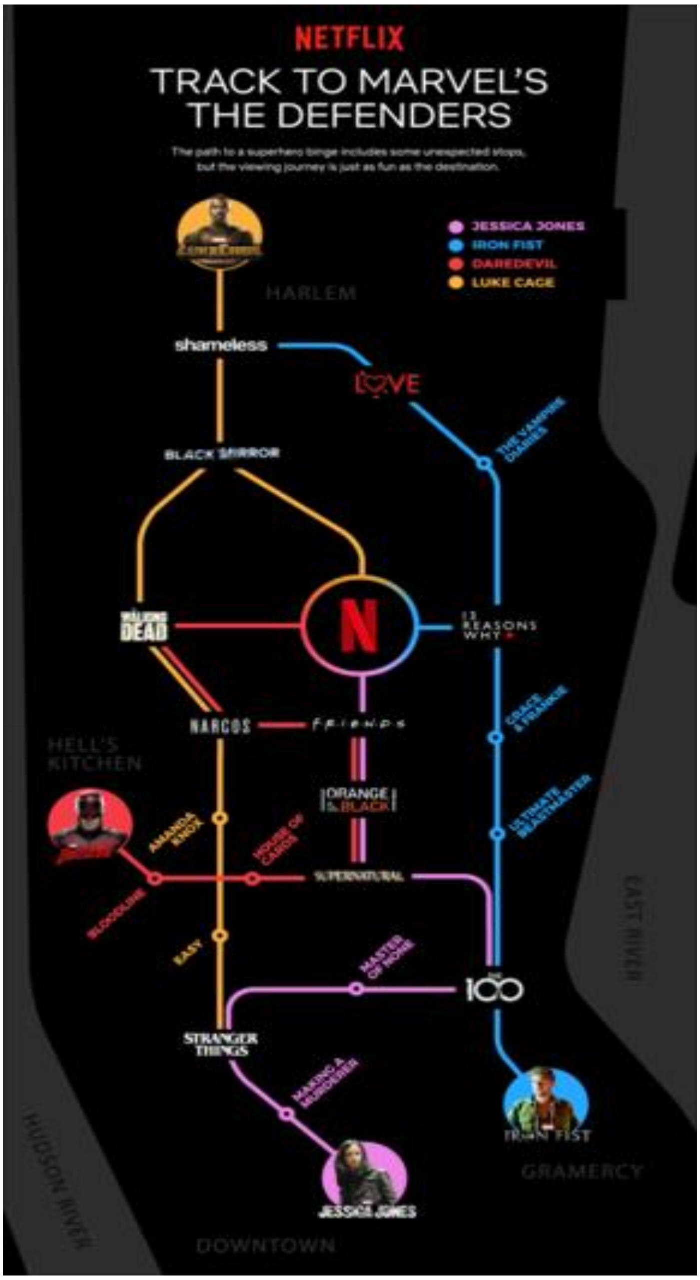

Fig. 35 (*Wired* 2017)

Yellin reasoned that the approach allowed the company to "look at what percent of people we showed it to actually clicked play, what percent of people had to go and look for it when we should've presented it on their homepage at the top" (quoted in *Wired* 2017). Since their inception, taste communities have informed what content is recommended, the sequence in which a subscriber sees it, and which genres are promoted and which are hidden, down to the descriptions of each product and which stills (featuring which actors) are chosen (Nguyen 2018). This specificity can sometimes reveal the hazards of relying on data to target subscribers, as was the case when a Twitter user accused Netflix of pandering to African American viewers by creating ethnicity-specific thumbnails (Nguyen 2018).

Fig. 36 (twitter.com/slb79)

The accusation gained traction on social media and was picked up by such outlets as *The Guardian*, *The New York Times*, and *The Independent*. Other Twitter users began posting screenshots of the discrepancies in racial targeting, such as the images below, which either feature each film's Caucasian leads or their minority co-stars.

Fig. 37 (twitter/codetrill and twitter/slb79)

Fig. 38 (twitter/codetrill)

In response to the backlash, a Netflix spokesperson said, “we don’t ask members for their race, gender or ethnicity so we cannot use this information to personalize their individual Netflix experience…. The only information we use is a member’s viewing history” (Iqbal 2018). Several months after the thumbnail incidents, a similar issue arose when Netflix conducted an experiment on another original programme, the animated anthology *Love, Death & Robots*. Because the show’s stand-alone episodes could be watched in any order, Netflix created four different versions of *Love, Death & Robots’* recommended episode sequence (version A, B, C, or D) which were assigned randomly to subscribers, presumably to learn which combination of episodes would yield the most views (Jeffrey 2019). Netflix did not publicly disclose its experiment. The lack of disclosure left it liable to accusations of sexuality profiling when another twitter user discovered the ordering discrepancy and mistook it as deliberate pandering towards LGBT subscribers.

Fig. 39 (twitter/LukasThomas)

Netflix responded to the user with a tweet of its own, saying, “We've never had a show like *Love, Death & Robots* before so we're trying something completely new: presenting four different episode orders. The version you're shown has nothing to do with gender, ethnicity, or sexual identity — info we don't even have in the first place” (Twitter/Netflix US). Despite Netflix’s explanation, the misunderstanding still made headlines as an example of the kind of miscommunication that can occur with the use of well-publicised algorithms to categorise groups of viewers and of the sort of experimentation that Netflix is conducting behind-the-scenes (Liptak 2019).

There is no way to validate the accusations that Netflix’s technology is making recommendations based on its determination of a subscriber’s race or sexuality except to suggest that such instances are examples of what Cheney-Lippold calls the “new algorithmic identity” (2011). New algorithmic identities are created when algorithms make inferences about an individual's gender, race, or class, based purely on the digital data available to them (Chenney-Lippold 2011). Netflix's use of data continues to bring algorithmic culture into the purview of the television industry and issues of algorithmic identities into the categorization of viewers. Netflix has sought to resolve enduring and familiar issues around the categorisation of audiences and the maximisation of their attention spans, but instead found that its datafication of audiences and content introduces new problems. The 'invisible technology' that enables the Netflix portal is supposed to inconspicuously and seamlessly improve the 'Netflix experience', *taking* control of laborious IDTV elements (categorizing, recommending) in order to *give* control of more enjoyable elements to viewers (binge-watching, perusing). However, as subscribers become increasingly aware of the technology that facilitates Netflix's desired sense of novelty and personalisation, its lack of transparency can become a source of suspicion.

An example of Netflix's failure to accurately recommend content to its subscribers is the slate of cancellations that occurred between 2017-2019. Approximately forty programmes were axed in that time period, garnering headlines like "Netflix and cull" (*Guardian*) and "Netflix has a cancelling problem" (*Junkee*) from journalists who highlighted the unapologetic abruptness with which the streamer was making cuts. As one *Guardian* writer put it, "[W]hat is behind this lurch into ruthlessness? ….[I]t wasn't such a long time ago that Netflix gained a reputation as the least ruthless content provider around. This was the platform, remember, that gave three entire seasons to *Hemlock Grove*" (Heritage 2019).

Despite the increased attention, the cancellations were not disproportionate to the number of new programmes and renewals of existing shows made by Netflix, which totalled 94 original productions and international co-productions, and 240 future projects in development. However, the *number* of cancellations seemed to become a secondary issue to the details of *which* specific shows were cancelled, and why. In 2019, eight of the twenty-one programmes discontinued by the streamer were creatively led by women or featured female-centric storylines (Travers 2019). Only two of the eight programmes (*OITNB* and *Jessica Jones*) had accrued three or more seasons when cancelled, while the rest (*Tuca and*

Bertie, The OA, Friends From College, One Day At A Time, Trinkets, and *Chambers*) lasted two seasons or less. The trend attracted social media interest but was picked up by the press after a fan campaign to save Netflix's 'surreal feminist' animated comedy *Tuca and Bertie*. Its first and only season was critically praised, currently holding a 100 percent 'fresh' rating on *Rotten Tomatoes* and lauded for being a "rare treat of a show" in the "extremely male-dominated world of adult animation" (Framke 2019). *Glamour* noted the necessity of having the female-led show within the male-dominated field of animation, saying "the main characters are voiced by women of color (Tiffany Haddish and Ali Wong), and it's an animated series for adults created by a woman (Lisa Hanawalt) about the female experience" (Logan 2019). In addition to the lauding of its unusual female-driven narrative, *Tuca and Bertie* was also celebrated for the way that its visually arresting style aided its surreal comedic storytelling. *The Hollywood Reporter* called the show "frankly, a glorious thing" and highlighted the "boundary-less" animation style (Fienberg 2019*). Vulture*'s Matt Zoller Seitz (2019) wrote that *Tuca and Bertie* was a "dreamscape where things turn into other things without explanation, metaphors and puns are made real, and any given frame might boast little marginal details that are delightful". He argues that part of the sitcom's perceived exceptionalism is that it was "so flagrantly uninterested in appealing to the kinds of viewers who need the mythology of a fictional world to 'logically' justify every choice the artists make within it" (Zoller Seitz 2019).

In the wake of such a complimentary reception, it came as a shock when Netflix announced that it would not be renewing *Tuca and Bertie* for another season, less than three months after it debuted on the portal. The news prompted a mix of speculation about Netflix's motives and lamentation that a programme with every theoretical reason to thrive on the Netflix platform was axed so swiftly. *Variety* called it "a loss for TV" and observed that it was "truly like nothing else on television both in style and substance… [*Tuca and Bertie*] is also one of the vanishingly few animated comedies created by a woman, let alone one anchored by two women of color (Ali Wong and Tiffany Haddish) who also serve as executive producers" (Femke 2019). The sentiment was echoed by *Forbes*, who called it a "disappointing move" from a streamer that appeared to be on the way to "producing truly unique television that would have struggled to find the greenlight elsewhere" (Di Placido

2019). The announcement came after *Bojack Horseman*, Netflix's flagship adult animation, was greenlit for a sixth season, making the axing of *Tuca and Bertie* appear even less favourable by comparison. As *Forbes* stated*, Tuca and Bertie* was "as bold and experimental as the strangest *Bojack* episodes from the start, and seemed likely to build a formidable fan community, given the chance" (Di Placido 2019). Netflix's lack of patience with the programme was detected by writers from *The Daily Beast* and *Indiewire*, who asked whether or not Netflix was "giving shows created by women fewer seasons to succeed" (Feder 2019). It was speculated that Netflix's lack of promotion for the sitcom was partially to blame, and that its algorithm was failing to target the right subscribers, a claim anecdotally backed up when *Tuca and Bertie's* showrunner confirmed that it had not been recommended to her by the streamer (Hough 2019). *The Daily Beast* argued that Netflix had disproportionately promoted *Bojack Horseman* over *Tuca and Bertie* and given the former "more opportunities to find an audience" despite its mixed early reviews (Feder 2019).

The public perception that Netflix's 2019 cancellations were partly the result of inadequate recommendations, deliberately or accidentally, was widespread enough that HBO was able to launch an advertising campaign with 'human recommendation' as the theme. "Recommended By Humans" is a promotional website disguised as a "human-powered show recommendation tool" which launched in the month following the *Tuca and Bertie* cancellation news (Alexander 2019). It features videos of fifty real-life fans of HBO programmes encouraging others to watch an episode (HBO Public Relations, *Medium*, 2019). The campaign was reportedly directly inspired by Netflix's data-heavy public strategy, and its tagline ("the best recommendations come from real people") and timing were deemed particularly prescient by outlets like *The Verge* and *Variety* in the wake of Netflix's high-profile cancellations (Spangler 2019, Alexander 2019).

Intentional sexism is unlikely to be a factor in Netflix's decision-making process. At the very least, the company has demonstrated an effort to recruit female showrunners through its million-dollar deals with the likes of Shonda Rhimes, Janet Mock, and Mindy Kaling. Yet, what is clear is that Netflix's approach to renewals has changed in the wake of its escalating commissioning budget and its ever-growing slate of domestic and international originals. As these examples show, the casualties of Netflix's new approach have happened to include programmes that should have had a better chance at reaching a sustainable audience and succeeding on an IDTV platform because of their creative risk taking and gender/sexual/racial diversity, rather than in spite of them. As the streamer has become more economically powerful, it has followed in the footsteps of traditional networks and become more risk averse, reigning in opportunities for creative experimentation and extending existing properties that are familiar to their existing fan bases.

The above cancellations seem to point to two possible conclusions. The first is that Netflix's recommendation algorithms have failed to effectively promote diverse or female-led content to its (then) 160 million total subscribers, and perhaps inaccurately conceptualised the taste communities or conglomerated niches that might likely have viewed them. Such outcomes undermine Netflix's claims that its recommendation and personalisation strategies work as effectively as the company would have its users believe. The second conclusion is that Netflix's recommendation algorithms are functioning successfully by promoting 'safer' content and established programmes for the majority of its subscribers, regardless of the taste communities to which they belong. Although this outcome serves the company's interests, it weakens Netflix's assertion that servicing many groups of conglomerated niches, by providing a diversity of accurately suggested content, is its point of differentiation.

2.6 Localising 'Global' Viewership

Netflix's propensity to conceptualise subscribers as taste communities seems less likely to be an attempt at driving creative change than experimenting with the opportunities of its algorithmic system, using its worldwide reach to remove geographic barriers when gathering information about taste communities in different countries. Although Netflix uses the word 'global' in its rhetoric, the company is not globally operational, despite being technically available in every country except China, North Korea, Syria, and Crimea (*Netflix Help Centre* 2020). Yellin confirmed as much, saying that Netflix initially wanted to recommend content based on a subscriber's geographic location until the company's data showed the idea to be "greater and greater nonsense and we are disproving it every day" (quoted in Roettgers 2017). An early instance was the streamer's research around a community of viewers for a grouping of Japanese anime programmes in its catalogue, as demonstrated by these examples:

Fig. 40 (*Netflix Media Centre* 2016)

Netflix discovered that this community was geographically diverse, with the highest concentration of viewers (10 percent) living in Japan and the remaining 90 percent living in other parts of the world (Gomez-Uribe 2016). This finding demonstrated to Netflix that most of a programme or grouping of programmes' taste community members could be, and are, found outside of the programmes' originating country, which shows the value of cultivating and retaining transnational viewership. Netflix claims that conceptualising taste communities as global rather than local was beneficial to the company when they entered new or smaller markets, as they had existing larger communities, with established datasets for recommendations, that Netflix could apply to these markets' subscribers (Gomez-Uribe 2016). By the same token, globally gained viewership insights benefit all of the company's customers, regardless of locality. Interestingly, Netflix says that its global taste communities tactic better supports its efforts at localisation. Former Vice-President of Personalization and Algorithms, Carlos Gomez-Uribe, wrote that Netflix's "localization efforts centre on adding local content, languages, payments, etc., the global recommendation system is separately allowing members to benefit from being part of the global community we are building" (2016). These sentiments reiterate the streamer's goal of being simultaneously global and local, incentivising and maintaining subscriptions through acquiring, commissioning, and co-producing local content, in more languages, with location-specific payment and delivery systems, without undermining the appeal of its international catalogue, all in the service of "personalization".

Further complicating Netflix's approach is its reluctance to share data about taste communities with the producers of its commissioned programmes. Its hesitance was challenged in October of 2019 when the company was asked to provide evidence to the Communications Committee of the British Parliament as part of an inquiry into SVOD services and public broadcasting in the United Kingdom (Alexander 2019). Netflix acknowledges that the "Committee asked about [our] approach to sharing data with creators" and claims that they have "recently began to share metrics more consistently with UK directors and producers about their individual shows and films" (Netflix, Parliament.UK, 2019). However, the only metrics that Netflix admits to disclosing with its collaborators are whether or not their viewers fall into one of three groups of "starters, watchers… and completers" (Netflix, Parliament.UK, 2019). Netflix revealed these groupings for the first time in the written supplementary evidence it provided to the Committee, explaining:

> The information we give them mainly consists of "starters" (i.e. households that watch two minutes of a film or one episode) and "completers" (i.e. households that watch 90% of a film or season of a series) for the first seven and 28 days on Netflix. We believe that these two metrics will give our creative partners a broader understanding of how members engage with their title from start to finish. We also selectively share "watchers" (i.e. households that watch 70% of a film or single episode of a series) with

> both the public and with creators. Depending on how useful our partners find this data, we will consider sharing it in more countries outside Europe and North America.
>
> Netflix—supplementary written evidence (PSB0069)

The company presumes the efficacy of this particular data as a measure of overall engagement on behalf of all of the producers whose work it buys. This disparity of access is the result of Netflix's software strategies, which give it control over viewership, and thus undermine its self-mythologized reputation as a creator-friendly company. Additionally, the company's caveat about *potentially* extending the offer of *only this* viewership information to producers outside of regions whose regulatory bodies have formally requested it demonstrates its intention to retain this control for as long as possible. However, more and more national supervisory agencies will inevitably seek to monitor and regulate the growing cohort of IDTV providers, so it is unlikely that Netflix will be able to make unilateral decisions regarding the use of its viewership data over its long-term future.

Netflix's ambiguous network identity makes its desire to be 'glocal' more tenable. The sheer number and geographic scope of its subscribers gives Netflix an impressive level of access. Yet the algorithmic audience strategies it adopts as a way of counting, categorizing, retaining, and enticing viewers (such as taste communities) is made more puzzling in the face of its 'glocal' approach. However, what television *is* differs from country to country and as Lotz, Lobato, and Thomas have pointed out, this sentiment remains true of IDTV (2018, 38). The variances in the industrial, cultural, and/or regulatory contexts of the countries in which Netflix operates, such as with the UK example above, must be factored in when the streamer makes claims about its contributions to the measurement of viewership practices. Despite the specificity enabled by its algorithmic data and tactics, the company's decision to focus on internationally aggregating viewer preferences makes its stated goal of procuring more local programming difficult to reconcile.

2.7 Ratings

Netflix gained the power to calculate and circulate its own ratings information as a consequence of its big data caches. The company has consequently been able to use this power as a differentiator from other networks by supporting the narrative that it is beholden to delivering a personalised viewing experience for subscribers rather than the conventional ratings criteria used by most television providers. Ratings remain a significant part of the television industry and, in the United States, the largest provider of television audience measurement is the Nielsen Company (Nielsen 2019). Nielsen has a near-monopoly over the country's television ratings research and its 'Nielsen ratings' have become the de facto industry standard for networks and advertisers (Kirst 2015). Nielsen ratings are gathered by following the viewing habits of a nationally representative sample of 41,000 households that reflect a cross-section of ethnicities, genders, and incomes (Nielsen 2019). Each household's television is fitted with an electronic measurement box which tracks viewership data, and each household member is provided with a button that they can use to alert the box when they have begun, and finished, watching a programme (Kirst 2015). The logic behind Nielsen's form of measurement is that a truly representative sample can provide a precise idea of the entire market. However, the fragmentation of audiences has been exacerbated by the widespread use of mobile devices and the proliferation of the internet, both of which facilitated changes in the engagement and consumption habits of viewers. Furthermore, these conditions led to the introduction of user tracking software, social media metrics, and the collection of accurate metrics on the majority of commercial websites on the internet (Kelly 2019). These conditions ushered in the feasibility (and later, the popularity) of streaming services, but the availability of big data analytics affirmed the hypothesis that consumer behaviour was shifting in response to the accessibility of new technologies.

Within the television industry, these shifts themselves demonstrated that 'audiences' require contextualising through updated market research tools which account for new practices such as time-shifting and watching across different screens. In a bid to address the changing audience, Nielsen announced a new service that would "offer the industry a syndicated solution to independently measure subscription-based streaming content" (Nielsen 2017). Though Nielsen does not single Netflix out by name, news media largely cited the streamer (and its famous reluctance to share its viewership figures) as the motivation behind Nielsen's move. One *New York Times* piece was titled, "How Many People Watch Netflix? Nielsen Tries to Solve a Mystery", while *Time* broke the news by proclaiming, "We Finally Have an Idea of How Many People Are Watching Netflix Shows" (Koblin 2017, Gajanan 2017). Nielsen's new service uses audio recognition software to listen for Netflix content, sending the information back to the research company. Nielsen is currently able to give B/C/S networks with linear channels a window into Netflix's highly guarded viewing figures, despite the streamer responding that the "Nielsen ratings are not accurate, not even close" (quoted in Gajanan 2017).

The symbiotic relationship between advertisers and ad-supported networks is a vital part of the television industry. Measurement metrics are necessary for calculating the rates and return on investment for schedule timeslots and programmes according to the demographics they are most likely to attract. In turn, these metrics led to the conceptualisation of some genres of programming, such as game shows, reality competition shows, and news programmes. IDTV interrupted temporally focused conventional ideas of viewership, and Netflix's high-profile silence about its viewing figures caused concerns for members of the advertising industry. Creating a better standardised method of audience measurement was "in the [television networks'] best interests, as well as mine", according to Amy McNeil, the head of digital media for Fiat Chrysler Automobiles, whose USD$750 million expenditure on television commercials made it one of the American television industry's largest sources of revenue (quoted in Steinberg 2017). Magna, a firm responsible for placing USD$17 billion in advertising across multiple sectors, singled out IDTV services as a cause of the industry's uncertainty (Steinberg 2017). Magna's president of North American operations David Cohen said, "[W]e have fracturing consumer usage that we know is going from linear TV to 'over the top,' to VOD, to mobile — and we don't have a good way to re-aggregate those audiences that is believable and reliable" (quoted in Steinberg 2017).

Donna Speciale, one of Time Warner's lead advertising specialists, notes that "[I]t's very hard to get to these consumer segments looking at things on an adults 18-49 basis. We have to be able to get a measure that's based on the audience segments advertisers want" (quoted in Steinberg 2017). On the topic of moving away from the 'Nielsen box' method, Speciale said that it was "not going to be one size fits all…it's not going to be like that anymore" (quoted in Steinberg 2017). The chief executive of Omnicom's North American branch, John Swift, who oversaw USD$29 billion worth of advertiser spending in 2017, highlighted the need to acknowledge the variety of platforms. Swift spoke of the "nuance in how users interact with different screens, whether it's a big TV or a little mobile device," and that he'd "rather have better measurement of each individual platform so that we can work within each to deliver the best experience rather than jamming it all together" (quoted in Steinberg 2017). The advertising sector's response demonstrates the flow-over effects of subscriber-funded IDTV onto B/C/S networks and their sources of revenue.

Netflix has been reticent to reveal viewing numbers for its original productions and even less willing to share the metrics that informed those numbers. However, in May of 2019, the streamer broke its own tradition by releasing 'top ten' lists of the most watched content on its platform, across various categories. The lists were initially trialled in, and limited to, its UK subscriber base, but became a permanent feature in all of Netflix's operating countries in February of 2020 (NMC 2020, Spangler 2020). Netflix's trial choice of the UK may suggest an attempt to give preferential treatment to Netflix originals. The UK catalogue is more limited than the US catalogue, meaning that originals make up a larger portion of overall available content. This proportion may account for the fact that its first 'most watched – series' list featured seven (of ten) Netflix-commissioned programmes. At the time, Netflix's metric for judging a show as 'watched' was that "members finished 70% of one episode" (NMC 2019). Furthermore, Netflix chose the "most-watched individual season of a show, film or special (regardless of when it launched)" (NMC 2019).

Also telling was the company's decision to explain its metric in a tweet, released through its official UK and Ireland twitter account. Netflix's choice to release this information in one of the forty thousand tweets on that social media platform (as of May 2019), rather than in a formal interview or press release with traditional media outlet, suggests an intention to draw its subscribers' attention to the metrics before, or at the same time as, drawing the attention of mainstream news media. The chronological and time-sensitive nature of twitter also means that Netflix's metrics tweet will have been quickly overshadowed by all the company's following tweets. This quick turnaround shields Netflix from the brunt of media scrutiny while allowing it to claim a measure of transparency. The notion that Netflix is inflating the viewership for its commissioned content was given more legitimacy when the company released its quarterly earnings report in January of 2020 (Porter 2020). CEO Hastings boasted that 76 million accounts had "chosen to watch" its fantasy drama series *The Witcher* and, several paragraphs later, revealed that the figure had been gathered using the company's new metric, which would now count two minutes of a programme or film watched as a 'view' (quoted in Porter 2020). Hastings' rationale is that the two-minute threshold "levels the playing field" between content of differing run times and (as was disclosed in a report footnote) is "long enough to indicate the choice was intentional" (quoted in Porter 2020). This explanation provides the company with an incredibly generous dispensation to publicly claim high viewership numbers for its originated programmes and grossly embellish its popularity in the eyes of subscribers, investors, and potential partners. While a uniform standard of viewership between IDTV providers would be difficult to create, and likely unnecessary given their individual incentives for revenue collection and programme funding, Netflix's measurement metrics demonstrate that accurate data collection is made redundant by subjective interpretation.

Netflix consistently stresses the importance of big data and algorithms to its network brand. The company's rhetoric urges subscribers to equate good user experiences with Netflix's portal as good user experiences with Netflix's content. However, the company's normalisation of software, interactivity, and the 'user' as IDTV norms have revealed several shortcomings. One instance is the availability and manipulation of ratings. Netflix rival Amazon Prime can display IMDB user scores for a large portion of its catalogue because its parent company Amazon owns the popular internet database. The integration of Amazon Prime Video with IMDB allows Amazon Prime subscribers to see the aggregated average viewer score for selected films or television series, based on the IMDB rating system, which comprises millions of global members, and not simply Prime Video users. Furthermore, the ratings (out of 10) are put into perspective with real-time figures of how many IMDB members have given a rating on a piece of content. For example, the 2018 film *Beautiful Boy*, which was distributed by Amazon Studios and consequently marketed on the platform as an Amazon original, has a rating of 7.3/10 based off 29,679 user scores. It is worth noting that IMDB ratings are a service aimed at consumers and thus do not meet the necessary reliability or accuracy standards of other ratings systems used by television industry professionals. Yet, IMDB is an existing ratings service with over 80 million users, accessible outside of the Prime platform, so Prime subscribers are likely to already be familiar with it (IMDB 2020).

The Prime Video example indicates that Netflix's competitors are taking advantage of the technological loopholes that Netflix helped to expose within the linear television system. However, these loopholes have also shown that Netflix's lack of transparency may be another attempt to hide its failures or mislead its subscribers (and the media) as to how popular its originals actually are. Netflix's retirement of its user reviews in July of 2018 supports this theory (Reisinger 2018). For the preceding decade, Netflix subscribers had been able to leave ratings and reviews that other users could view (Stefansky 2018). The ratings were based on five-star scores, until August of 2017, when the system was changed to thumbs-up/thumbs-down evaluations (NMC). Netflix compensated subscribers by adding a percentage (out of 100) alongside each item that estimated how likely a user might enjoy the item, based on what the streamer's algorithms had gleaned from the user's viewing history (NMC 2017). Netflix justified its decision-making by saying that pre-existing norms around star-based rating systems had prejudiced users against them as a measure of personalisation:

> We've all gotten used to star ratings on e-commerce and review apps, where rating contributes to an overall average, and the star rating shown next to a restaurant or a pair of shoes is an average of all the reviewers. On those apps, being a reviewer can be fun and helpful to others, but the primary goal isn't always to help you get better suggestions (Netflix Media Centre 5th April 2017)

The company countered, “[W]hen people see thumbs, they know that they are used to teach the system about their tastes” and credited the implementation of a thumbs-up/thumbs-down method with a “200% increase in ratings activity” (NCM 2017). The emphasis on personalisation rather than the perceived objectivity of mass audience reviews was repeated when Netflix cited “declining use” as the reason for removing all existing user reviews (NMC). However, the abolition of user reviews coincides with a steady decline in average user ratings for Netflix originals:

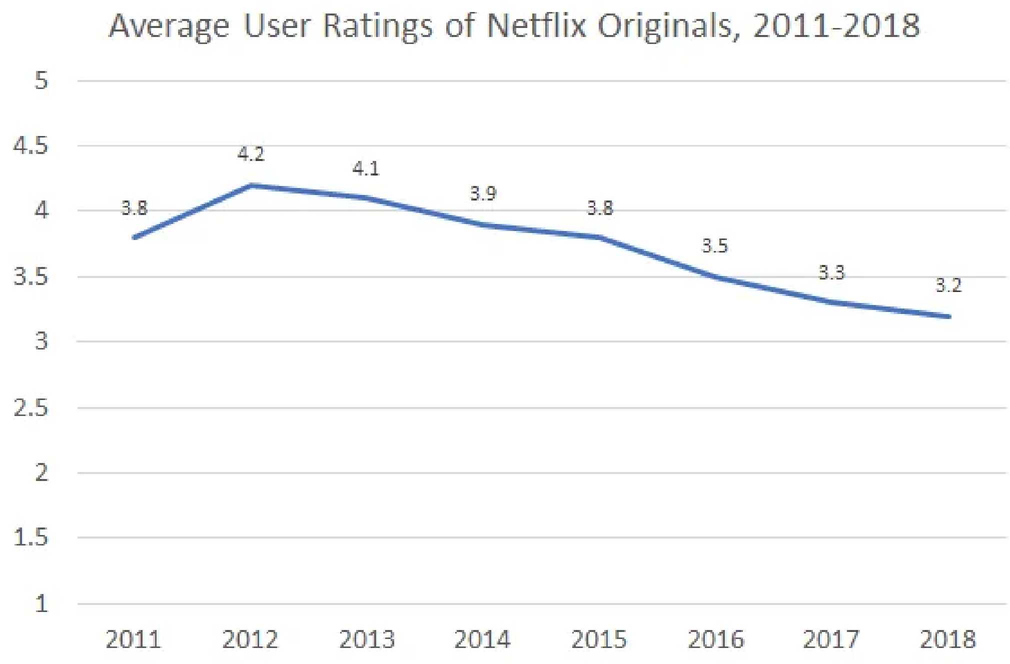

Fig. 41 (Lynch 2018)

User reviews peaked in 2012 for Netflix originals, and the timing of this decision gives the company a convenient way to direct subscriber attention away from outside opinions on recommended Netflix originals, thereby reinforcing the notion that the only useful measure of a subscriber’s enjoyment is their own viewing record. By extension, this notion also implies that a subscriber’s valuation of the Netflix service should be based on their personal satisfaction with it and not the critical or popular judgements of its increasing catalogue of Netflix-originated content. Although Netflix insists that “writing a ‘bad review’ never had any bearing to whether a title was recommended to other viewers or not”, its highly selective and secretive disclosure around viewing figures has not gone unnoticed by others in the industry (Stefansky 2018). When Netflix reported that its original film *Bird Box* had been seen by 45 million accounts in the first week of its release (a Netflix record, according to the company) critics were left wondering about the accuracy of that statement and the lack of clarification regarding the variables mentioned (Alexander 2018). One of the loudest voices to raise criticism was John Landgraf, the CEO of the FX television network. “Netflix is not telling you the full story”, said Landgraf at a Television Critics Associations Panel in February of 2019 (quoted in Travers 2019). He likened Netflix to the “Silicon Valley companies” who use internet video metrics to “inflate their views and is not a remotely accurate representation of a long-form program’s performance” (Landgraf quoted in Travers 2019). Landgraf argues that these metrics oppose the “average audience” viewership tracking that most networks with linear channels employ, which creates an average by “adding up every minute viewed of an episode (or season) and dividing it by the total duration of the program” (quoted in Travers 2019). Landgraf’s comments illustrate an industry frustration with Netflix’s tactics. Moreover, such frustration demonstrates the wider issue that Netflix’s viewership numbers are incomparable with much of the American television industry, which continue to use Nielsen boxes.

It is worth noting that Nielsen research confirmed that approximately 26 million viewers had seen *Bird Box* domestically in its first week (Pallotta 2019). Netflix has not released an official reason for its decision to begin sharing viewership data nor has it elaborated on its selection criteria. The company seems to understand the importance of establishing popularity and how viewing numbers have traditionally aided in attracting industry talent (A-list actors, writers, and creators) to networks. The closest executive confirmation of this sentiment was a statement Sarandos made in a 2019 analyst report, saying that Netflix’s social media release strategies were “less financial metrics as they are a cultural metric” which both created and estimated the amount of hype and chatter around a Netflix show (Sarandos quoted in Schneider 2019). The “cultural metrics” approach allows Netflix to shield its subscribers from critical scrutiny of its productions in the press until such time as they have seen the shows themselves. Because Netflix uses algorithms to recommend content to subscribers who are most likely to watch it, the initial attention following the premiere of a Netflix original is likely to be positive, which may encourage less-inclined subscribers to watch or seek out the content. This was the case with *Bird Box,* which received a week-long theatrical run prior to its debut on the Netflix portal. Despite some early reviews, Google trend data showed almost no internet searches for the film until *after* its release on Netflix, when Google searches increased exponentially as users and critics began to discuss it (Lovely 2019). While this data-led strategy has the advantage of generating potentially more public reviews, its real benefit is that it appears to increase the number of viewing hours. Viewing hours are important to subscriber retention; regardless of the perceived popularity or acclaim of a product in the Netflix catalogue, the longer users spend on the Netflix platform, the more likely they are to find content they personally enjoy, and the more likely they are to consider the service as providing enough value to justify the ongoing monthly cost.

When Netflix tweeted that its original dramedy series *Sex Education* was “on pace to be watched by 40 million accounts in its first month” only seven days after its premiere, television commentators responded back via the same medium (quoted in Pallotta 2019).

Fig. 42 (twitter.com/Netflix)

James Poniewozik, the television critic for *The New York Times*, tweeted, “Sooooo we're just taking Netflix's self-reported numbers as fact now, cool, cool” (quoted in Pallotta 2019). Chicago Film Critics Association president Brian Tallerico responded with a tweet that read, “[I]magine if studios just told you how much a movie made without any sort of oversight or proof…You see why these kinds of Netflix-released numbers are silly...” (twitter.com/brian_tallerico). Daniel Fienberg, the president of the US Television Critics Association and the *Hollywood Reporter*’s television critic, tweeted, “It's official: Netflix tweeting utterly BS ratings — guessing on the first month ratings of a show that's been out for 12 days — is actually worse than no Netflix ratings” (twitter.com/thefienprint). Press outlets are not the only agents whose access to viewing numbers are restricted. Because of the lack of uniformity with regards to how Netflix measures its own content, it can share viewing information with showrunners, actors, and producers at its own discretion, and the specific analytics shared can vary (Ng and Battaglio 2019). Maggie Gyllenhaal, who made the film *The Kindergarten Teacher* with Netflix, was provided with its viewership data, claimed that “there’s no universe in which even a fraction of that number of people would have seen this movie [in theatres]” (quoted in Ng and Battaglio 2019). Meanwhile, the executive producers for the streamer’s rebooted *One Day At A Time* were denied any data relating to viewership (Ng et al 2019). Industry agents, managers, and actors operating in linear television environments expect a degree of financial and contractual bargaining power related to strong viewership numbers (Ng et al 2019). This expectation exists because of the near-blanket use of Nielsen ratings among ad-funded networks, which are typically shared with the creative staff of a programme to ensure accountability on behalf of the programme’s advertisers.

The disproportionate access to viewership data enabled by the SVOD ecosystem empowers Netflix to control the extent to which it considers ‘viewership’ a factor worthy of financial recognition for its creators. It also disempowers those creators from using that information in any creative or professional decision making. The situation is similar for networks who have licensing/acquisition deals with the streamer. One anonymous network executive claimed that Netflix had only provided information about views per season and not per episode, with “no indication of what a view even means”, rendering any analysis “meaningless” (Ng and Battaglio 2019). A different network’s executive confirmed that Netflix withholds demographic statistics about the viewers of its acquired programmes and does not offer data about any other content in its catalogue (Ng et al 2019).

Netflix has not responded to these critiques directly, but Reed Hastings gave oblique assurances at the company’s April 2019 Earnings Call that Netflix would be “more fully transparent about what people are watching around the world” and provide “more granular reporting to producers and consumers” (quoted in Laporte 2019). Four months later, when Ted Sarandos was asked to comment on a slate of Netflix original cancellations, he offered the similarly vague pledge of, “we are being much more transparent with creators and increasingly with the public in terms of what's being viewed on Netflix” (quoted in Shaw 2019). Despite having normalised the practice of viewership secrecy and discriminatory disclosure (with seemingly minimal negative consequences) Sarandos and Hastings’ response demonstrates the flexibility of Netflix’s brand. The company can choose when, in what ways, and how often it complies with industry norms in terms of sharing viewership information, through relying on its disrupter status to bypass industry gatekeeping.

Netflix’s self-calculated viewing figures have come under criticism for their contribution to industry insecurity about data subjectivity. At the same time, its viewing figures have also been used to challenge biases around the marketability of minority stories in popular culture. A recent example that served as celebratory self-promotion and social commentary was a Netflix tweet about the sustained viewership of the Ava DuVernay miniseries *When They See Us*. According to the streamer, 23 million domestic accounts watched the four-part show about the ‘Central Park Five’, which dramatized the true story of five African American and Latino teenagers falsely convicted of the 1989 rape of a female jogger.

Fig. 43 (twitter.com/Netflix)

The story has particular relevance because former US President Donald Trump had taken a personal interest in the case, having bought print advertisements at the time that urged the reinstatement of the death penalty in New York State following the arrest of the five boys (Ransom 2019). The release of *When They See Us* prompted renewed calls for Trump to apologise for inciting prejudice against the men, whose convictions were overturned in 2002 following the confession (and corroborating DNA evidence) of another man (Ransom 2019). Trump's refusal to acknowledge their exoneration made news headlines, with Netflix's mini-series credited for contributing to the national conversation about institutional racism in America and the media's role in socio-political accountability:

Fig. 44 (twitter.com/msnbc)

Show creator DuVernay also shared the figures on social media, using them to contradict the "industry myth" that minority-focused stories "don't travel" (quoted in Armitage 2019). DuVernay elaborated on her decision to partner with Netflix for *When They See Us*, telling the *New York Times* that she wanted to "put it on a platform where it can actually be seen instead of chasing a theatrical release" (quoted in Buchanan 2019). She notes that her previous Netflix-released documentary *13th* (about the intersection of slavery and the prison industrial complex in America) garnered four times the audience of her Oscar-nominated Martin Luther King Jr feature film *Selma* (Buchanan 2019). DuVernay's explanation is that socially conscious and minority content is underrepresented partly because of traditional distribution systems, which have held the potential to alienate economically disenfranchised audiences from such content. In using her platform to highlight Netflix's viewing data as a partial remedy for the disparity in access between minority media and audiences, DuVernay lends her clout in support of Netflix's own 'cultural capital'. Additionally, DuVernay's example shows how deftly Netflix's viewing figures can be wielded when the company chooses to share them with a programme's creator.

Fig. 45 (twitter/ava)

In re-focusing the narrative away from widely used measurement standards like user reviews and ratings and towards the idea of personalisation, Netflix pivots visible critique about its original content away from its subscribers while continuing to distinguish itself from its competitors. Furthermore, Netflix's strategic release of its viewing figures has normalised the practice of seemingly competing with itself. As a standalone service, without advertisers to answer to, or any linear scheduled content to compete with, Netflix can essentially 'brag' about its high-performing programming without any contextualising competition. This strategy also signals to the industry, including high-profile actors, writers, and directors, that Netflix properties can attract sizeable and/or recurring audiences. This builds confidence that its huge subscriber base does correlate to huge viewership numbers due to the causation of accurate and personalised recommendation/marketing algorithms and interface design.

2.8 Conclusion

Streaming, time-shifting, and personalisation are now mainstays of the television industry and will continue to affect the larger media matrix for decades to come. Netflix represents IDTV in its most exciting iteration because it encapsulates practices from broadcast, cable, and premium cable channels – and thus affirms their continued influence – but adds value through user-focused, internet-related approaches. The reliability that defined television as a cultural ideal remains intact because the industry around it adapted to the changes of IDTV as soon as it became viable to do so. These adaptions only strengthen television's endurance and ensure its importance as a socio-economic medium.

Furthermore, networks with linear channels and the companies that own them have been taking notice of how well viewers have responded to what Chuck Tryon calls the "myth of choice". Regardless of the sociological effects of increased connectivity and binge-watching, the idea of what internet television *is* in the popular imagination, and the industrial change that Netflix has had on the creation, buying, selling, and distribution of media remains assessable and important. Streaming technology and the spatial and temporal flexibility it facilitates have permanently altered television industries worldwide. Streaming-adjacent technology, such as smart televisions, smartphones, and tablets, continue to improve, along with the data and algorithms that enable their user-friendliness. The industrial infrastructure around streaming culture and the experientiality of IDTV viewing norms is making accommodations for these improvements, as demonstrated by the prevalence of B/C/S networks with streaming services that operate alongside their linear channels. Netflix thus exemplifies the tension between the liberating, creative possibilities of internet distributed media while demonstrating how those same possibilities validate existing industrial norms.

One of Netflix's notable contributions is the creation of norms through streaming lore and rhetorical repetition. Through its accumulation of data and the improvements it has been able to make to its platform, Netflix's public discourse creates an aspirational, widely spread idea of television consumption. The data it gathers allows Netflix to speak authoritatively (though not necessarily correctly) on what subscribers want and think they want. It publicises algorithmic culture as the new frontier of media production and consumption and participates in mythologizing itself as a leader in technological innovation and audience satisfaction through its personalization capabilities. Despite vocally championing its origination of (rather than its reliance upon) such new technology, most of its facts and figures about viewing numbers remain closely guarded, with a handful of highly disputed examples as exceptions to this practice. This has not prevented mass speculation towards these numbers and open criticism of the company's viewership metrics, with independent information-gathering agencies releasing their 'best guesses' based on contextual indicators and their access to viewership data that is not restricted by Netflix. This information is then broadcast across press outlets in ways that enhance Netflix's status and further the centrality of data to the future of television. Although the television industry is increasingly influenced by 'algorithmic culture' existing hierarchies of power and control have prevented its smaller rivals from unseating Netflix as the current leader of the IDTV market. The same hierarchies have enabled Netflix to enrich its bargaining power by collaborating with experienced producers, hiring A-list directors and writers, and participating in the Hollywood system. Netflix uses algorithms and data to procure content and create personalized viewing experiences for its subscribers, allowing them distinction among internet-based services and television providers alike. In achieving this distinction, Netflix extends Catherine Johnson's idea of branding as a cultural experience and exemplifies what Lotz has called the era of "television in transformation" (2018).

Netflix's public image, in tandem with its use of technology, draws on the false dichotomy between the internet's 'active' image and television's 'passive' reputation to present IDTV as a superior alternative, primarily through the practice of binge-watching. While binge-watching has certainly increased exponentially, its relevance to the television industry lies in how it is discursively framed to promote IDTV as a re-energising technological tour-de-force. Netflix has capitalised on convergence-era language by successfully synonymising control and convenience with the company, and in the process, forgoing a direct association between IDTV itself and the Netflix brand.

Chapter Three: The United States of Netflix

3.1 Introduction

The preceding chapters focused on Netflix's use of digital media technologies and their importance to its growth and differentiation as an IDTV provider. This chapter examines Netflix's impact on, and relationship with, television industry players in its domestic market of the United States. It discusses the industrial conditions that existed prior to Netflix's debut, demonstrating how the streamer was able to take advantage of regulatory policies that had not yet accounted for the capacity of internet-distributed televisual content to bypass the gatekeeping of established networks with linear channels. This chapter also explores how Netflix's actions in the American television industry are framed within press discourses. It argues that Netflix has a reputational and operational flexibility that stems from media perceptions of IDTVPs as 'disruptive' as well as the speed with which the IDTPV was able to establish itself as an original content creator within the American market. This chapter takes Lotz's (2019) "industrialization of culture" approach by acknowledging the technological, regulatory, and economic conditions in which Netflix operates. It recognises that these conditions have instigated changes to the ownership arrangements of media conglomerates and subsequently, to the funding practices of existing broadcast, cable, and satellite networks. Netflix's adaptability facilitated an industrial climate in which IDTV providers are both increasingly common and increasingly accommodated by television writers and producers, studios, industry media, and consumers. In turn, many networks have been encouraged by IDTV's viability to create their own non-linear IDTV/OTT platforms as supplements for their linear broadcast content. The company's contributions to America's television environment are discussed in relation to the industrial factors that enabled its growth, including the proliferation of cable channels, especially premium cable channels and networks (PCCs and PCNs) and the rise of high-end complex serial drama as the preeminent form of programming for brand distinction. This chapter investigates Netflix's reliance on acquired content. It asserts that the company acquired high-end serial drama to entice subscribers to its service by taking advantage of existing industry financing practices that required cable networks (at the time) to generate licencing revenue in order to offset the cost of producing said high-end content. Furthermore, the chapter explores how Netflix adopted a strategy of writer-producer ‘mega deals’ to industry financing practices by exploring several of the IDTVP’s most publicised and popular partnerships. It notes the ways in which these collaborations with writer-producers rhetorically legitimate Netflix as a source of original programming, as well as the lasting impact of conglomerate media consolidation on the domestic US television industry.

3.2 The American Television Industry and the Internet

In April of 2019, Netflix reached a new height of sixty million American subscribers. The streamer’s growth within the American market reflects the cycle of innovation, appropriation, adaptation, and normalisation that characterises the introduction and take-up of all media forms and technologies. Having had the benefits of regulatory protections, decades of accumulated financial and social capital, and an infrastructure that maintained their positions, incumbent networks seemed well-positioned to weather the encroachment of IDTV providers. While the potential of the internet had proven itself by the mid-2000s, its viability as a television platform that could succeed within an industrial paradigm created to maintain the hegemony of existing networks was only demonstrated when Netflix appropriated the initial innovations of the internet and adapted them to suit the online delivery of film and television content.

When Netflix entered the American market in 2007, the majority of the country’s networks were owned by six multimedia conglomerates: the CBS corporation (CBS, The CW, and Showtime) Time Warner (HBO and Warner Brothers Studios) 21st Century Fox (formerly NewsCorp – Fox) NBC Universal (NBC, USA, Hulu, and Universal Pictures Studio) Viacom (Paramount Pictures) and the Disney corporation (ABC). In 2007, they accounted for at least

70 percent of all revenue generated in the television industry, in addition to producing 80 percent of all TV content, which was created in owned or affiliated studios, aggregated via their networks, and distributed through various broadcast and cable channels (pay-TV) (*Statista* 2019). However, in 2005, the video sharing platform YouTube went live. By 2007, it had exploded in popularity, contributing to a 50 percent growth in American internet traffic per year (*Guardian* 2008). The rise of YouTube indicates the exponential increase of online video and its popularity with the public, but it was made possible by the maturity of internet infrastructure. In America, this infrastructure is largely owned and controlled by the formerly mentioned companies, thanks to a regulatory framework established to support the cable industry. When cable technology was introduced in the 1950s, its capability as a transmission technology became apparent to incumbent broadcasters and prospective cable companies. In a 1965 ruling intended to protect broadcast stations, the Federal Communications Commission (FCC) mandated that telephone companies would not be permitted to enter the cable market (Lynskey 2017). This ruling set a precedent that incumbent companies could use existing regulations pertaining to their technology of choice as a way to handicap the increased competition made possible by new technology. By the 1970s, wooed by the opportunity to reach wide audiences, broadcast stations lobbied for rule changes that would allow them to cooperate with cable companies. In 1974, the Supreme Court subsequently granted cable companies the right to retransmit broadcast content upon payment of a licencing fee, instigating a regulatory shift that benefitted cable companies. This shift was left unchecked until Congress passed a Consumer Protection Act in 1992, ostensibly aimed at organising the thousands of minor regional cable companies and incentivising telephone companies to enter the market. However, because of the previous decade of regulatory freedom, telephone companies were unwilling to pay the high-entry costs of cable-laying or break the stronghold of established licensing deals. This resistance allowed cable companies to consolidate and form monopolies, the largest of which was Comcast (Bock et al. 2014).

With the arrival of broadband cable and DSL in the 1990s, cable companies and telecommunication companies consolidated even further, and the existing monopolies allowed the cable sector to monopolise broadband internet and the telecommunications sector to monetize wireless internet (Bock et al. 2014). Netflix was able to gain traction from 2007-2014 because of its outlier status in the television industry. As neither a cable provider nor a Telcom, Netflix was exempt from the maintenance and upkeep of either infrastructure. After it achieved success, and thus became a target for the conglomerates that controlled the infrastructure, Netflix's lack of longevity became a hindrance. Consumers were encouraged to subscribe through the promises of ease, immediacy, and uninterrupted control of (primarily wireless, high speed) internet delivery. As Telecommunications companies had a stranglehold over the wireless market, they were not under pressure to maintain or upgrade their existing infrastructure. This lethargy worked to their advantage further because it resulted in slower internet speeds and lower quality video for their customers, thereby undermining Netflix's opportunities for subscriber retention and growth.

The situation came to public attention when reports leaked that Comcast and Netflix were in dispute over peering fees, which broadband providers charge companies in order to have direct access to their networks. Typically, peering agreements worked on a basis of quid pro quo. Because of the highly consolidated media industry, it was in each sector's interests not to impede the access of the other, as doing so would result in an equal amount of retaliation. Netflix had no such control, leaving it open to pressure from incumbents, like Comcast, which allegedly throttled Netflix-related internet traffic (Seward 2014). In 2014, Netflix was eventually forced to pay Comcast directly for unrestricted internet, in a "congest transit pipes" peering deal, and this concession resulted in Netflix reaching similar deals with Verizon, Time Warner Cable, and AT&T (Seward 2014). Fearing further concessions, Netflix was one of the parties who vocally opposed the proposed acquisition of Time Warner Cable by Comcast later that year, dramatically hand-delivering a 256-page document to the FCC in which Netflix warned that the merger would give Comcast "even more anticompetitive leverage" and violate net neutrality principles (quoted in Kastrenakes 2014). When the merger eventually fell through, media outlets were quick to assign Netflix a portion of the credit. One *Mashable* headline proclaimed, "Netflix's 'main goal' was to kill the Comcast merger. Mission accomplished", while publications like *The New York Times* and *Fortune* highlighted the company as a poster child for the American net neutrality debate (Stewart 2014, Ingram 2015). As *The New York Times* wrote, "Netflix, for better or worse, has become the symbol for net neutrality, which has become a key issue in how regulators analyse proposed cable and telecom mergers" (Stewart 2015). The relationship between Netflix and Comcast took a turn in 2016 when they announced that Comcast would integrate the Netflix application on its X1 platform, giving its millions of users the ability to directly stream Netflix-hosted content if and when they subscribe to the service (*Comcast Press Release* 2016). In April of 2018, the partnership was extended to include a Netflix subscription with Comcast's pay-TV Xfinity packages (*Netflix Media Centre* 2018). The move represents a recognition on the part of both parties that co-existence is necessary to ensure growth in the new televisual marketplace. The result of Netflix's subsequent success is that mutually-beneficial deals (such as Comcast's integration) between industry incumbents and streamers which encourage customers to maintain both cable and IDTV subscriptions are becoming increasingly common as older networks come to accept the 'new normal' that Netflix helped to usher in through its adaptable approach.

3.3 The Influence of Cable

Netflix's initial traction in America signalled the feasibility of subscription-based internet television to the national industry, leading to the increasing appropriation of IDTV practices (including portals and features) within established television institutions and the normalisation of IDTV services as a permanent dimension of the television medium. However, significant transitions had already occurred in the American television landscape, without which Netflix could not have become successful. Explains Dunleavy:

> Restructured by deregulation, conglomeration and globalization in the 1980s and 1990s, the television landscape was transformed after 2000 by the combined impacts of digitization and convergence, consequent multiplatform transmission and continuing inter-network competition. (2018, 11)

The crucial precipitators to Netflix's popularity were the rise of cable channels, premium cable networks, and the high-end drama content they commissioned. The period between

2000-2007 in particular (Netflix's entry) was a time of proliferation, with a wider variety of programmes on a greater number of broadcast and cable channels, the former of which were losing market share to the latter (Dunleavy 2018). Cable networks, basic and premium, were not only competing with broadcasters, but with each other. Networks' efforts to differentiate themselves by crafting a distinguishing brand identity led to the "expansion of cable-originated drama", an expansion also necessitated by the rising costs of acquired content on which basic cable networks had been dependent (Dunleavy, 2018, 26).

Arguably, the most influential types of drama programmes at this time were (and continue to be) complex high-end serials. As defined by Dunleavy, serialized programmes have episodes which are "interrelated and interdependent, must be viewed in strict order, and the interpretation of new events in the narrative present is always informed by the events of the past" (2018, 102). In complex serials, these facets serve to tell one overarching story that typically follows one main protagonist supported by a group of secondary characters (Dunleavy, 2018, 103). Serials differ fundamentally from 'series' forms, which are designed with episodic narrative closure in mind in order to best facilitate the advertising breaks and weekly viewing of the broadcast schedules for which they were created (Dunleavy, 2018, 100). Complex serials have seriality as a conceit, and are characterised by innovative concepts, narratives that rewards attentive viewing, transgressive protagonists and the consequent uses of violence, profanity, or nudity that accompany their transgressive actions, and high production values (Dunleavy, 2018, 3). The moniker 'high-end' includes high production values as well as several other important distinguishers. According to Dunleavy, high-end television is typically shot on ultra-HD film and digital formats and can cost anywhere from USD$3-5 million per episode to produce (2018, 4). This budget allows for more expensive cinematography, the use of outdoor locations, and realistic set designs, all of which contribute to a dynamic mise-en-scène and an individuated televisual aesthetic, also serving the narrative goals of the programme (Dunleavy, 2018, 4).

In the 2000s, basic cable networks like AMC and FX were commissioning highly-viewed original dramas which employed high-end complex serial strategies, including some violence, nudity, and profanity, without alienating advertisers (Dunleavy, 2018, 27). The success of programmes such as FX's *The Shield* and *Nip/Tuck* demonstrated the appeal of basic cable-originated complex serial dramas for networks and advertisers alike, validating the networks' (albeit necessary) decision to venture into costly high-end television drama commissioning (Dunleavy 2018). Premium cable networks were better situated to originate high-end complex serials because of the creative freedom afforded by the lack of FCC regulation and the incentive to target niche, underserved, and affluent audiences, both of which are enabled by a subscriber-funded model. An innovator of high-end complex serials, and indeed, of many of the commissioning and content strategies discussed later in this chapter that Netflix would later appropriate and adapt for IDTV, was the Home Box Office network, known by its abbreviator HBO. Beginning with *Oz*, in 1997, the next decade would see HBO release such influential and commended dramas as *The Sopranos* (1999 - 2007), *Six Feet Under* (2001 - 2005), and *The Wire* (2002 - 2008).

HBO's objective was to attract and retain subscribers through brand differentiation and the origination of critically-acclaimed, exclusive high-end complex serials, devoid of advertising breaks and regulatory censorship. Dunleavy describes the five main strategies it employed to distinguish its original drama content. The first was the recruitment of established writer-producers whose programmes had garnered critical praise or "demonstrated an idiosyncratic quality or viewpoint" (Dunleavy, 2018, 80). These writer-producers, or 'showrunners', included Alan Ball, David Chase, Tom Fontana, Ed Burns, and David Simons. The second was the "creation of authorship discourses" for these showrunners, associating them with notions of artistic integrity which then designated their HBO shows, and the HBO brand by extension, as exceptional and unique within the American television industry (Dunleavy, 2018, 80). The third strategy to achieve high-end production values was to increase HBO's serial drama budget while simultaneously lowering the number of episodes to an average of 13 per season (Dunleavy, 2018, 81). These measures permitted HBO to spend more money per episode than any network at the time, starting with *The Sopranos* and its estimated average of USD$2 million per episode, increasing to over USD$4 million for 2004's *Deadwood* (Dunleavy, 2018, 81). Large budget increases also facilitated HBO's fourth strategy of consistently high-production values across its programmes, cultivating a style of visual storytelling that "recognizes the aesthetic qualities and subtleties" of HD video, filmic cinematography, and location shooting (Dunleavy, 2018, 81). The fifth and final strategy was the "branding of cultural distinction for HBO's original dramas", a theme the PCN established in 1996 with its (now iconic) slogan, 'It's Not TV, It's HBO' (Dunleavy, 2018, 82). While HBO is certainly television, the conceptual differentiation of its high-end complex serials from even the most expensive dramas found on broadcast, basic, and premium cable competitors, was substantiated thanks for the preceding four strategies discussed above. Furthermore, the cultural distinction of high-end complex serials helped to entrench the importance of exclusivity as a strategy for building audience loyalty, securing HBO's position with cable system providers, and protecting the HBO brand (Dunleavy, 2018, 158).

HBO continues to utilise these successful tactics. As late as 2019, the PCN was widely acknowledged to have made the most expensive high-end serial drama to date with *Game Of Thrones*, which has become a brand-defining cultural phenomenon (Seale 2019). With episodes costing between USD$5-15 million over the course of 8 seasons, *GOT*'s estimated total budget was USD$630 million (Seale 2019). In these ways, HBO created the template for American high-end complex drama, a template still emulated by American premium cable, basic cable, and IDTVPs alike, as will be explored further in the chapter.

3.4 Content and Acquisition

Netflix's relationship trajectory with existing broadcasters – from acquiring existing programming to developing in-universe companion original content with networks like The CW – reflects the 'new normal' it helped to establish within the US TV industry. Between 2007 – 2013, before it began commissioning its own material, Netflix was completely dependent on acquiring programming from other sources. Such programming was often the result of the cable boom of the late 1990s-early 2000s and the resulting high-end complex serial dramas it produced. Some programmes, such as AMC's *Breaking Bad,* received wider viewership on their home networks once earlier seasons had been made available on the

Netflix service, leading *Breaking Bad* creator Vince Gilligan to famously comment that, "Netflix kept us on the air" after the show won the award for Best Drama Series at the 2013 Emmy Awards (quoted in Acuna 2013). This example demonstrates the relationship between Netflix and BCNs at its most reciprocal, shortly before the industrial and financial conditions of programme creation, ownership, and distribution would change to allow networks (and their parent companies) to retain most of their content's streaming rights for their own (subsequent) IDTV platforms.

Despite its investment of more than eight billion US dollars per year into its own 'Netflix originals', the company's need for acquired programming is a permanent feature of its operational mode. Originals act as incentives for subscriber retention and attraction, but Netflix's commissions are unlikely to ever substantially lessen its reliance on acquired programmes. This reality has implications for Netflix's future. Of Netflix America's ten most streamed shows in 2018, nine belong to networks who have since announced their intentions to launch competitor streaming services in the coming years (Molla 2018). Out of these nine, NBC owns *The Office* (US version), *Friends*, and *Parks and Recreation*, which NBC Universal states will be available on Peacock once their respective licensing deals are finished (Steinberg and Littleton 2019). Of the remaining titles, *Grey's Anatomy* is owned by ABC, a Disney-owned network, while *New Girl* and *That 70s Show* belong to Fox, whose content is now owned by its new parent company Disney and will potentially appear on Disney + or Hulu in the future. *Criminal Minds* and *NCIS,* the remaining two programmes in the top nine, are both CBS properties and *Supernatural* is owned by The CW.

Though the popularity of acquired content among its subscribers reveals one of Netflix's weaknesses, it also demonstrates one of its main strengths – its technological aptitude. As the originator of the IDTV platform in the United States, Netflix pioneered the data-driven protocols regarding the presentation and viewing of content on IDTV portals, especially complex serial drama content, whose features (as discussed earlier) were well-suited to the advantages of streaming. Netflix customers may prefer to watch existing popular acquired programming, but the overall experience of watching their chosen content on the Netflix interface appears to provide value in its own right. The customer expectations of IDTV as a convenient, user-friendly, and personalised experience likely influenced the interface designs of Disney + and other networks as they attempt to beat Netflix at its own game. While original commissioning is becoming progressively crucial to brand differentiation, subscriber retention, and international expansion, Netflix originals are unlikely to substantially lessen its reliance on acquired programmes for the foreseeable future.

In 2008, a year after the company launched its streaming service, Netflix announced licensing deals with Disney/ABC, CBS, and Starz (*Netflix Media Centre* 2008). CBS gave Netflix access to the partial back-catalogue of the *CSI* franchises, as well as the right to stream then-current seasons of *NCIS* and *Numb3rs,* in addition to *CSI: Miami* and *CSI: New York*, one day after broadcast (*Netflix Media Centre* 2008). Disney/ABC provided Netflix with a selection of youth-oriented material, such as the Disney Channel show *Hannah Montana* and the ABC Family drama *The Secret Life of the American Teenager* (*Netflix Media Centre* 2008). The Starz deal provided both companies with a valuable lesson about the importance of original content and the growth opportunities of IDTV. Netflix announced its partnership with Starz ten days after the Disney/ABC announcement. The deal – worth a reported $20-30 million a year for five years – would add 2,500 titles to Netflix's catalogue, among them new releases from the film divisions of Disney and Sony (CNBC 2012). By former CEO Robert Classen's own admission, Starz was "late to the table with HD and on-demand" and its affiliation with Netflix would compensate for the delay in monetizing its streaming options (quoted in Nelson Jnr 2014). At the time of its contract with Netflix, Starz owned an 18-month pay-TV rights window for both Walt Disney Studios and Sony Pictures (Dempsey 2008). By way of the Netflix-Starz arrangement, Netflix subscribers were able to stream these films on its service, substantially boosting Netflix's appeal. As a new streaming service in an untested market, its ability to negotiate for recently released films was severely limited. However, between 2008-2012, Netflix's US subscribers grew from 8 million to 25 million, thanks in part to its increasing catalogue of new releases. Through Starz's unintentional short-sightedness, Netflix was able to vicariously benefit from Starz' cable-TV rights package while also undermining Starz' pay-TV business. This lesson was not lost on Starz. The company decided not to renew its contract in 2012, despite a $300 million a year offer from Netflix, reportedly over Starz's insistence that Netflix implement a tiered pricing scheme whereby Netflix subscribers would have to pay an additional fee to access Starz content (Lawler 2011, Fritz, Flint, and Chmielewski 2011). The emphasis on exclusivity was reinforced in a Starz statement claiming that the parting was motivated by the need to "protect the premium nature of our brand by preserving the appropriate pricing and packaging of our exclusive and highly valuable content" (quoted in *CNBC* 2012). Chris Albrecht, who succeeded Clasen as Starz CEO, has since commented on the Netflix/Starz deal, calling it a "terrible idea" and asserting that if it had continued, they "would have eroded our core business" (quoted in Fritz 2011).

By the end of 2012, Netflix had outbid Starz for the streaming rights to Disney Studios films (Fritz and Flint 2012). The three-year deal, beginning in 2016, was worth a rumoured $300 million a year, with "wide agreement" in the media that the move was a blow to Starz (Lieberman 2012, Fritz 2012). Netflix's partnership with Disney yielded more than just an estimated $300 million a year for the so-called 'House of Mouse' (Jenkins 2018). In 2015, *Daredevil*, the first of a series of Marvel Studios/Netflix television co-productions, was released on to the portal. The Disney-owned Marvel Studios had agreed to produce original programmes with Netflix that centred on four Marvel comic characters in the superhero team, The Defenders. In total, six programmes – *Daredevil, Jessica Jones, Luke Cage, Iron Fist, The Defenders,* and *The Punisher* – were made, with *Daredevil* and *Jessica Jones* receiving critical and popular acclaim (Welch 2018).

At the end of the Disney/Netflix deal, news broke that Disney would not be able to use the title characters in any new content for two years after the cancellation date of their related Netflix show (Galbraith 2018). Disney created waves of uncertainty across the media industry when it announced plans to create its own streaming service, Disney +, in August of 2018. Disney declined to renew existing licensing deals with OTT and IDTV providers, instead promising customers that they would be able to watch existing content from Disney, ABC, Fox, Marvel, Lucasfilm, and Pixar, among others, through the new service, as well as future original films and shows starring well-loved Disney-owned characters (Bond 2018). The announcement came shortly after Disney had negotiated a high-profile deal to buy 20th Century Fox for US$71 billion, outbidding Comcast to acquire the film and television divisions of Fox, as well as a controlling share of Hulu (Gartenberg 2018). The scale of mergers and acquisitions that have occurred during the rise of IDTV is unusual, with parties remarking on the differences in approval times between AT&T's purchase of Time Warner, which took 18 months to get Department of Justice and FCC approval, and the Comcast buyout of NBC, which took over a year to get the same legislative greenlight (Johnson 2018). Disney's acquisition of Fox was approved in just six months, despite reservations by some antitrust experts, because it was not proposing to buy the news or sports divisions of Fox entertainment and therefore required no legislative intervention to protect public interests (Goldsmith 2018). The financial and logistical manoeuvres that precipitated the upcoming Disney service could not have been predicted a decade ago, and its possible consequences have left many professionals in the industry, as well as those commentating on it, uncertain. What is clear is that the growth of IDTV, as represented by its key player in the American market, contributed to a series of disruptions and surprising developments across the television industry. The wide-ranging and swift nature of these changes demonstrate that IDTV's role in the television ecosystem is far more interrelated and nuanced than the 'innovator versus incumbent' narrative which has often characterised the public relationships between Netflix and the rest of the industry.

Netflix's impact extends beyond influencing the sales of multi-billion-dollar companies and the terms of licencing and acquisition agreements. Its practice of selectively sharing arbitrarily chosen viewership data with the creators of its original programming and with the owners of its acquired content was discussed in Chapter Two. This withholding of information denied creative professionals a bargaining tool considered standard within the rest of the industry. Additionally, Netflix faced legal and public backlash from prominent networks over its poaching and hiring of their executives. In October of 2018, Viacom announced publicly that it was suing Netflix for attempting to "illegally augment its own workforce by 'cherry-picking' employees from other entertainment companies" (quoted in Gardner 2018). Viacom accused Netflix of "inducing" former TV executive Momita SenGupta to "break her contract" with the media mammoth (quoted in Maddaus 2018).

SenGupta had spent a decade supervising physical production for Viacom subsidiaries MTV, VH1, and Comedy Central, and her hiring as the new vice-president of physical production for original series at Netflix was part of a strategic move to expand their physical production department for the creation of original content (Maddaus 2018). In a complaint filed to the Superior Court of Los Angeles, Viacom takes aim at Netflix's reputation, calling their manoeuvre "neither trailblazing nor innovative", to which Netflix responded by blaming Viacom's "legacy studio employment practices" for being unenforceable (quoted in Maddaus 2018). 'Legacy media' is a term used by the Press to refer to "those television industry entities that existed before internet distribution" (Lotz 2017). SenGupta's personal contract dispute became a way for both companies to address the public narrative of competition between established networks and internet-based streamers. Viacom undercut Netflix's presumption of innovation by implying that the company steals employees – and by extension, ideas, expertise, and credit – from established companies, who are implied to have earnt their success and reputations fairly. Netflix's response was in the same rhetorical vein, inferring that Viacom's contractual process was outdated, which implies that the company's delivery mode and complacency are among the latter's practices that require updating.

The SenGupta incident was not the first time Netflix had been publicly held liable for its hiring tactics. In 2016, Fox sued Netflix for "poaching" two former executives, both of whom continued to work at Netflix in the intervening two years, despite the ongoing legal battle (Patton 2018). This suit went to trial in 2019 and, according to *Variety*, was "being closely watched by the industry" for the precedent it could set with regards to IDTV companies unsettling de-rigueur employment practices (Maddaus 2018). Netflix used the same legal defence in the Fox suit as it did in the Viacom suit, arguing that the fixed-term employment contracts favoured by 'legacy media' companies "restrain employee mobility and create unlawful barriers to entry" (quoted in Gardner 2018). Netflix's self-positioning as a champion of flexible work contracts against its 'legacy media' competitors rhetorically casts Fox and Viacom as regressive and stiflingly traditional. However, Netflix has suffered its own criticism for job dissatisfaction, as documented in a 4500-word exposé published in the *Wall Street Journal* about Netflix's "blunt firings" and high-pressure workloads (Ramachandran and Flint 2018). The piece suggested that Netflix had a "culture of fear" over its reportedly cut-throat practice of culling employees whose performances were deemed adequate but not stellar (Ramachandran and Flint 2018). Regardless of the job satisfaction of its workers – who have doubled from 2,022 in 2013 to 5,400 in 2017 – Netflix's documented string of redundancies demonstrates that its rhetoric towards the Fox and Viacom lawsuits is a calculated attempt to enforce the false dichotomy between the 'outdated' practices of so-called 'legacy' media and the 'improved' behaviours of IDTVPs, despite engaging in problematic practices itself. While Netflix's narrativizing may not be fooling its competitors, the streamer's brazen acquisition of top-tier executive talent is galvanizing them. Netflix is not a disruptor because it harbours altruistic artistic motivations around employment. It is a disruptor because it weaponizes its status as a comparatively new entrant to the established media marketplace as a business strategy to challenge accepted interpretations of Hollywood's entertainment laws.

3.5 Netflix and Acquired Content

Both Netflix and Premium Cable Networks operate using a subscription model. Because of the exclusivity, limited schedule hours, and exceptionality of PCNs' commissioning strategies, their approach tends to place quality before quantity. PCN viewers are incentivised to maintain their subscriptions because they expect programming that, as a result of the creative freedoms applied to their commissioned shows, is unlikely to be found on broadcast networks, whose funding model encourages episodic series formats and proven formulas such as police procedurals. Since these subscribers tend to be more specialised audiences (the PC sector having historically favoured those with sufficient disposable income to afford monthly subscriptions), a PCN's ability to target and attract new viewers is more limited than that of IDTV providers, whose monthly subscription charges have also been lower than for SVOD portals. Hence, the logic of exclusivity and specificity that drives content creation also informs the financial realities of PCNs, who must be selective and discerning with their commissioning decisions to maximise the appeal for their subscribers. Netflix aims for quality *and* quantity, finding ways to balance these elements through its mix of acquisitions and originals. Netflix brands itself as an amorphous entertainment company, carving out an industrial and creative space where it can simultaneously be a television network, a content originator, and a software company, without limiting itself to any one identifier. Hastings confirmed this strategy in a 2016 interview, when TV critic Alan Sepinwall asked for his response to the idea that "there is no one concrete Netflix brand" (Uproxx 2016):

> Our brand is personalization…. we didn't want any show to define Netflix. And we didn't want Netflix to define any one of our shows. So it really is about what people's tastes are and if you love *The Ranch* (a multi-cam family sitcom starring Ashton Kutcher) you may not like *The Get Down* (a drama about the early days of hip-hop, from Baz Luhrmann) and vice versa. They really are geared to different audiences, but it's having the artistic license to make shows in all these different arenas that's really amazing. But I think if you really silo what you're interested in, like "We only want shows for men 18 to 49," then you're going to get a mixed bag of shows for men 18 to 49. You say, "No, I want the best shows from everyone in the world for everyone in the world." Then you're going to more likely to stumble onto something great like a *Master of None*. (Hastings quoted in Sepinwall 2016)

Netflix's vagueness as an 'entertainment company' helps it to disguise its reliance on the acquired programming from broadcast and cable networks that currently makes up most of its available content. Furthermore, Netflix disinforms its viewers as to the origins of programmes bearing the 'Netflix original' label. The label is used in the marketing, previews, and pre-opening credits of shows to which Netflix holds the exclusive streaming rights outside of the show's national territory (Jenner 2018; Wayne 2018). Most non-Netflix logos pertaining to shows' home networks are removed, with the exception of a few co-productions such as the Marvel series (Wayne 2018; Jenner 2018). The deliberate obfuscation of this labelling is that Netflix-produced programmes are given the same 'Netflix original' title, leading viewers to assume that all programming in the catalogue with 'Netflix original' branding is created by Netflix. When asked about the company's views towards the de-branding of AMC properties *Breaking Bad* and *Portlandia*, Reed Hastings reiterates the importance of the Netflix experience, saying "for most people that's a Netflix experience, not an IFC or an AMC experience" (Hastings quoted in Sepinwall 2016). Hastings endeavours to re-frame the company's unethical poaching of its acquired shows by invoking the discursive 'Netflix experience', which attempts to create distinction through the provision of user-centric personalisation for subscribers. Thanks to the innovations of digitalisation and high-speed internet, Netflix's delivery platform and interface have given rise to new viewing habits and different viewing experiences to those that were possible in the decades when television was confined to linear transmission. However, the streamer's technological advantages do not supersede or transform acquired content, nor do they entitle Hastings to claim ownership or credit over acquired content simply because it is viewed on his company's portal. Furthermore, Netflix's de-branding distracts from its debt to high-end PCN dramas which helped to attract its domestic subscriber base before the IDTVP had begun to commission its own content, especially programmes like AMC's *Mad Men*, the latter of which Netflix acquired in 2011 for USD$1 million per episode (Hayes 2020).

Netflix's need for acquired content has not been lost on its competitors. The streamer's lack of a distinctive creative brand identity was summed up by Damon Lindelof – the producer of HBO's upcoming television adaptation of *Watchmen* - who said, "I can tell you what an HBO show is. What is a Netflix show versus a Hulu show versus an Amazon show? I can't answer that question" (quoted in Jarvey 2019). When commissioning its own originals, Netflix does not aim to synonymise its programming with 'quality' in the ways that HBO has done so successfully. Rather its strategy has been to deploy the idea of 'quality' when needed, as an additional incentive for subscription and a well-proven strategy for long-term relevance and subscriber growth, as demonstrated by HBO in the preceding decade. In turn, subscriber growth brings cashflow which the company can reinvest into content commissioning and production.

Netflix received a lesson about the limits of content branding and the importance of IP ownership in early 2017. In March of that year, Sony Pictures Television (SPT) announced that it had secured the linear television rights to show the first four seasons of *Orange Is The New Black (OITNB)*, one of Netflix's first three original programmes, on its then-forthcoming new channel, Sony Crime Channel UK (Adetula 2017). SPT launched Sony Crime Channel in 2018 with the aim of targeting a “predominantly female audience” with an interest in factual and fictional crime stories (White 2018). *Orange Is The New Black* was selected as a flagship drawcard for Sony Crime Channel (five years after it accomplished the same goal for Netflix) with Sony’s executives praising its status as a high-end programme. SPT’s vice president Kate Marsh justified the decision by saying, “we recognize the demand for premium content…which is exactly what [*OITNB*] offers” and that it was “widely recognised as a must-see series” (quoted in Adetula 2017). Although it is popularly recognised as a Netflix show, *OITNB* is in fact owned by Lionsgate Television, who acquired the once exclusive rights from Netflix when the show’s creator (who produced *OITNB* for Lionsgate) signed an overall deal with Netflix (Goldberg 2018). When discussing a possible sequel, Lionsgate TV Chairman Kevin Biggs told investors to “keep in mind that we own that series and will be distributing it for years to come” (quoted in Goldberg 2018).

Perhaps stirred by the possibility that more of its licensed flagship programmes would become available on other platforms, Netflix is moving further towards full ownership of its originals. Such a shift indicates that the company wants control over when and where licensed Netflix originals can be viewed in order to protect the exclusivity that incentivises subscription growth, a strategy already used by HBO. In July of 2018, news broke that Netflix signed its first ever syndication deal with American basic cable channel Comedy Central, which will allow it to air prior seasons of the Netflix original adult animated sitcom *Bojack Horseman* (Bullard, 2018). This news infers that Netflix is choosing to approach syndication on its own terms, now that the threshold of exclusivity has been breached by Sony. Despite the IDTVP’s move towards increasing and controlling its originated properties, it appears that Netflix’s subscribers are spending more of their viewing hours on acquired content, as shown in the following Nielsen SVOD Content Ratings graph.

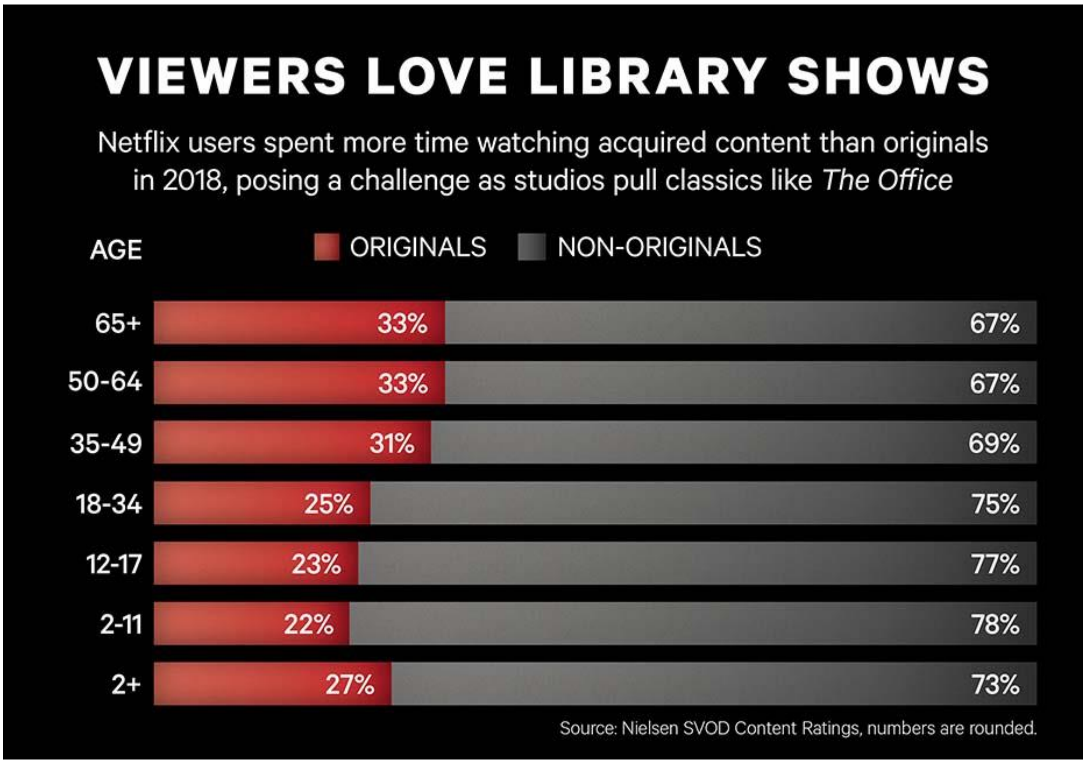

Fig. 46 (Jarvey, *Hollywood Reporter*, 2019)

It is difficult to determine whether subscribers mistakenly believe these programmes are Netflix originals because of the company's intentional mislabelling, or if they are fully aware of their programmes' originating network but prefer the convenience of viewing them on Netflix. Whether or not its attempts to 'borrow' credit are successful, Nielsen's calculations show that Netflix is reaping the benefits of other networks' content. Furthermore, according to one 2019 study of American viewers conducted by streaming search engine Reelgood, Netflix had the second-highest number of "high-quality" television shows out of the top five streaming services consisting of Hulu, Amazon Prime, HBO Now, and Showtime (Clark 2019). The study did not distinguish between acquired and original programmes and problematically considered any programme with an IMBD audience rating of 8.0 or higher to be "high-quality" (Clark 2019). Netflix, which had a total of 203 "high-quality" shows, was narrowly beaten by Hulu and their catalogue of 213 "high-quality" offerings (Clark 2019). Despite having the largest catalogue of content, only 142 of Prime Video's 2,317 television programmes met the high-quality threshold, while HBO Now and Showtime had 43 and 12 respectively (Clark 2019).

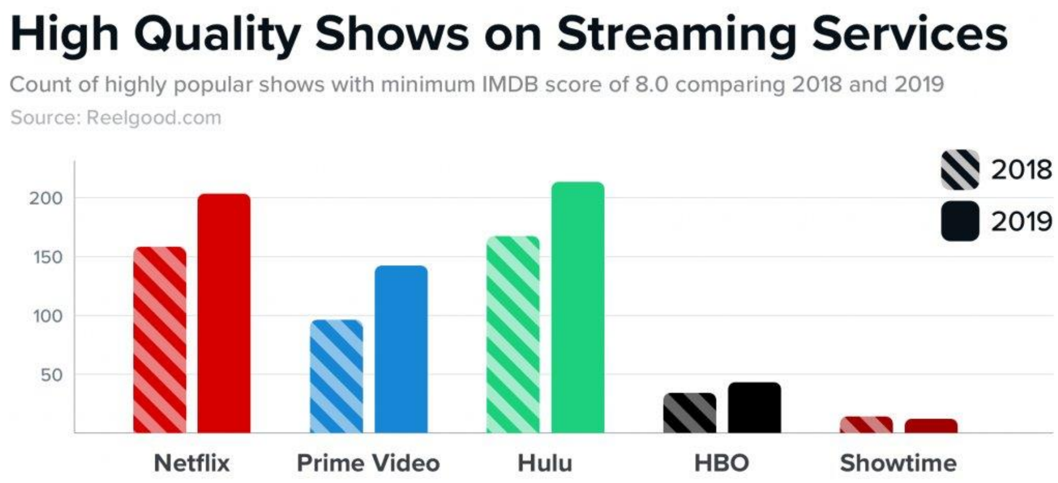

Fig. 47 (Reelgood, Clark, *Business Insider*, September 2019)

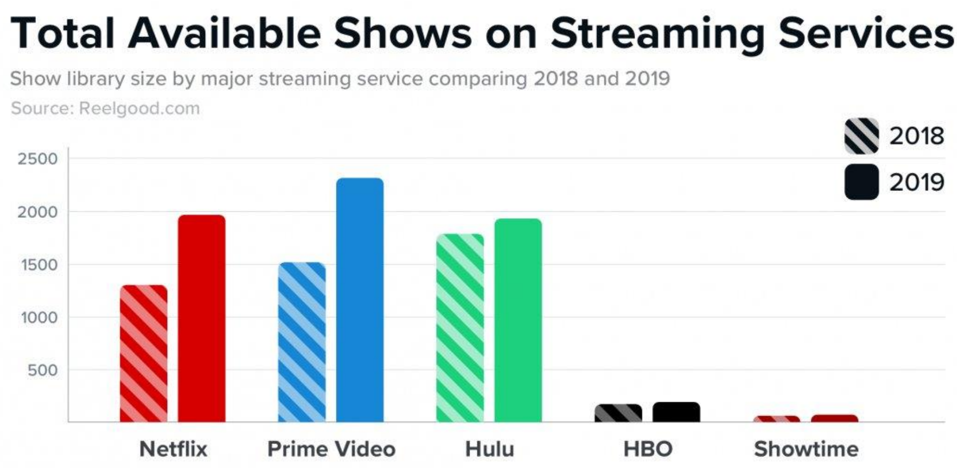

Fig. 48 (Reelgood, Clark, *Business Insider*, September 2019)

As of 2019, Netflix had 1966 television shows in its US catalogue. The vastness of Netflix's IDTV catalogue, along with its algorithmic approach of creating and recommending many categories of suggestion (such as "hidden gems for you", "casual viewing", and "TV shows about marriage") has encouraged the rise of binge-watching as a common consumption practice. In addition to binge-watching, Netflix's heavily-personalised strategy has ironically resulted in the exacerbation of the "paradox of choice" (Gruenwedel 2019). The term was coined by psychologist Barry Schwartz and refers to the contradictory outcomes of consumers having ‘too many’ choices, such as indecision and dissatisfaction with their final selections (Schwartz 2004). While Schwartz used the idea to refer to an ever-crowded marketplace of consumer goods and products, press outlets have borrowed the term to contextualise the growth of IDTV services and the high level of accessibility to increasingly expanding content catalogues that they provide viewers. One *ABC News* headline read, “Netflix, 'show-verload', and the paradox of choice in the streaming age” (Donoughue 2019) while a *Sydney Morning Herald* article claimed that “the paradox of choice keeps you scrolling through Netflix” (Stark 2019). Such media interest has been enough to inspire some statistical analysis, such as one 2019 Nielsen Audience Report which investigated how streaming service users in the United States are “navigating the ‘paradox of choice’ and deciding what to watch” (Nielsen 2019).

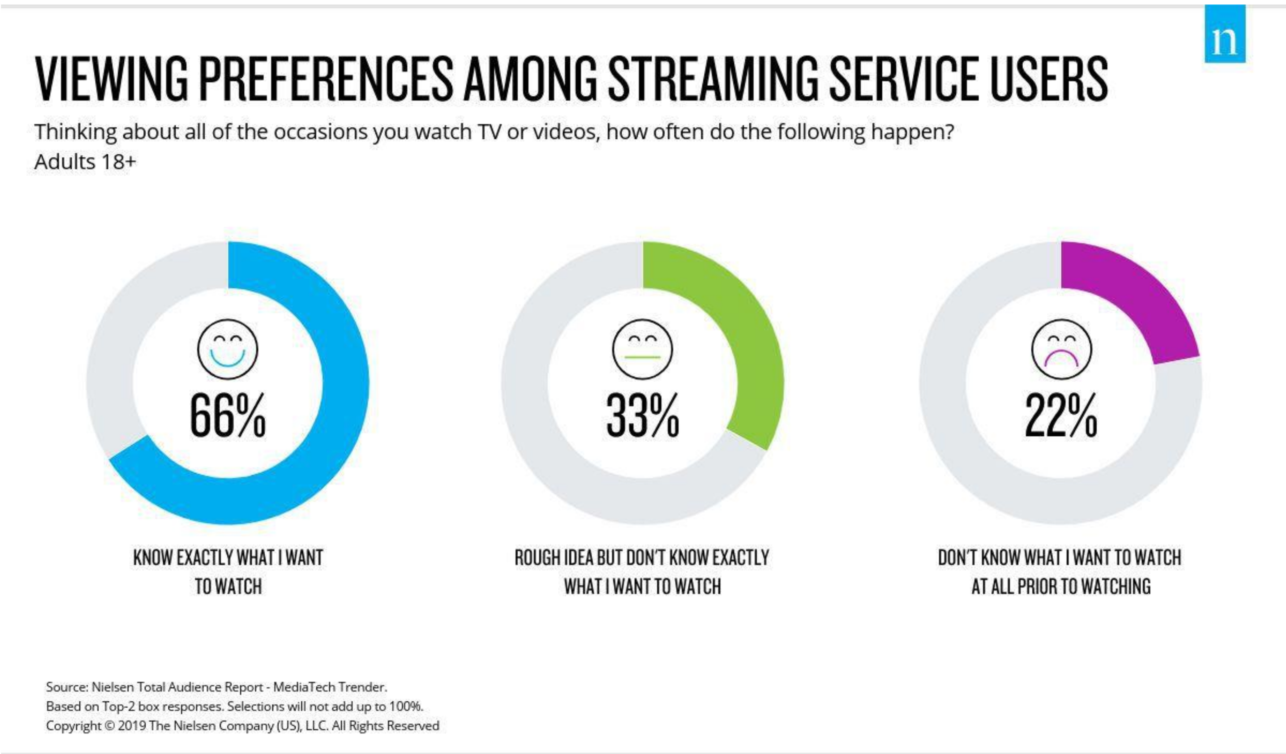

Fig. 49 (Nielsen 2019)

The report found that only one-third of respondents routinely scrolled through their SVOD’s menu for recommendations, with 30 percent exiting the SVOD service if they are unable to find an acceptable choice within ten minutes of browsing (Nielsen 2019). The report discovered that over 50 percent of viewers returned to their favourite programmes if ‘decision fatigue’ set in, a finding that appears to partially explain the enduring popularity of some of Netflix’s most-viewed acquired shows, such as *Friends* and *The Office* (Nielsen 2019). This finding differed according to age group, with adults between 18-34 being slightly more open to searching through an SVOD’s catalogue and more receptive to its suggestions than respondents aged 35-49 (Nielsen 2019).

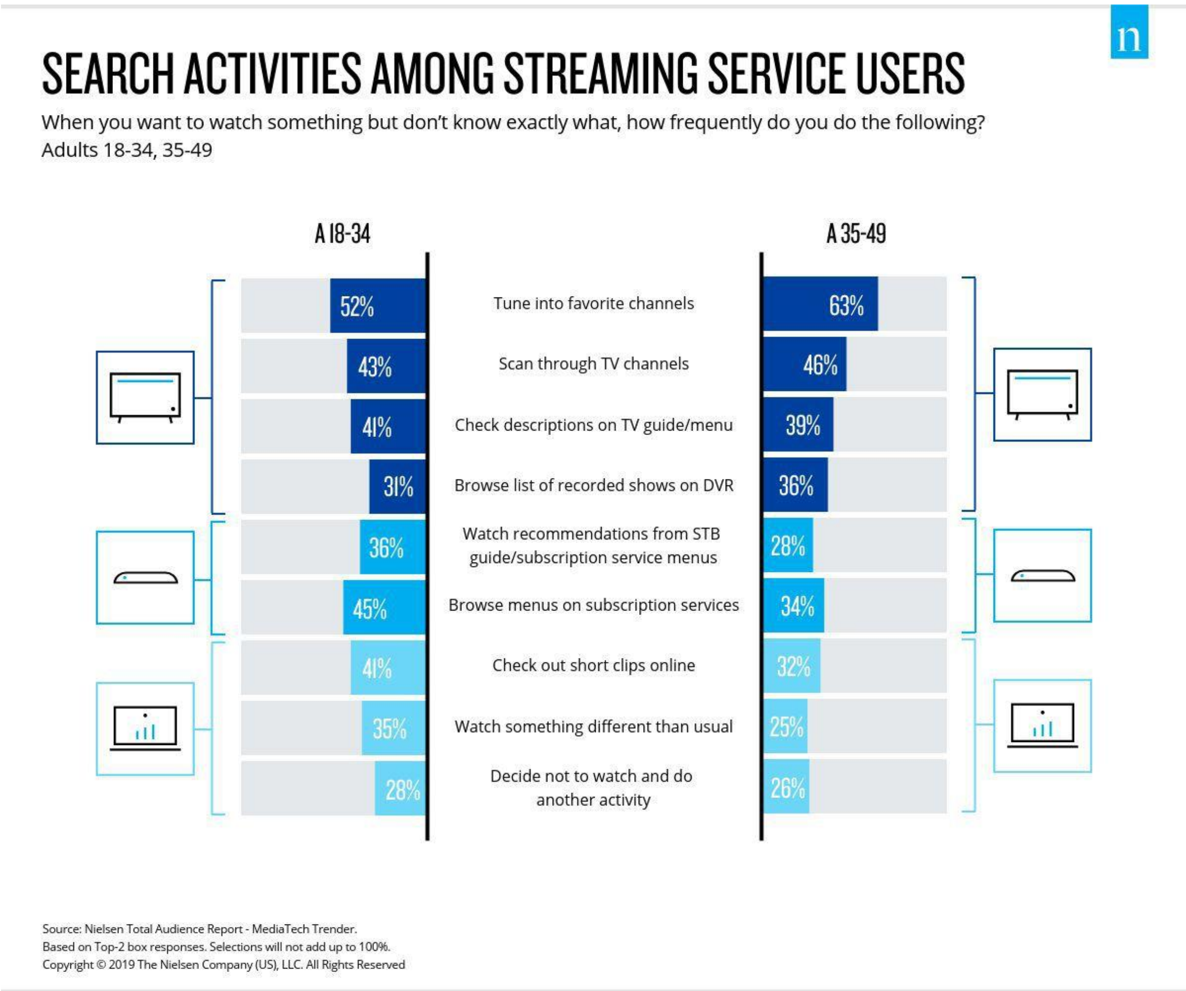

Fig. 50 (Nielsen 2019)

Nielsen reported that daily television viewing hours are increasing, which they partly credit to the increase of SVOD services in American homes, finding that seven of ten households subscribe to at least one SVOD service (Nielsen 2019).

Another 2018-2019 study conducted by Deloitte came to similar conclusions. It revealed that 49 percent of its survey participants experienced “decision fatigue” where the amount of content available on streaming services makes it difficult to choose (Westcott, Loucks, Downs, and Watson 2019). In terms of what drove subscriptions, 57 percent of respondents cited ‘original content’, meaning content that appears to have been originated on/commissioned by the streaming service, (a number which increased to 71 percent for those in the millennial age bracket). As shown in the graphic below, respondents cited that the three primary reasons for cancelling subscriptions were the removal of programmes from a catalogue, the inconvenience of needing multiple services to access all desired content, and advertisements (for ad-supported VOD services) that exceeded eight minutes for an hour of content (Westcott et al 2019).

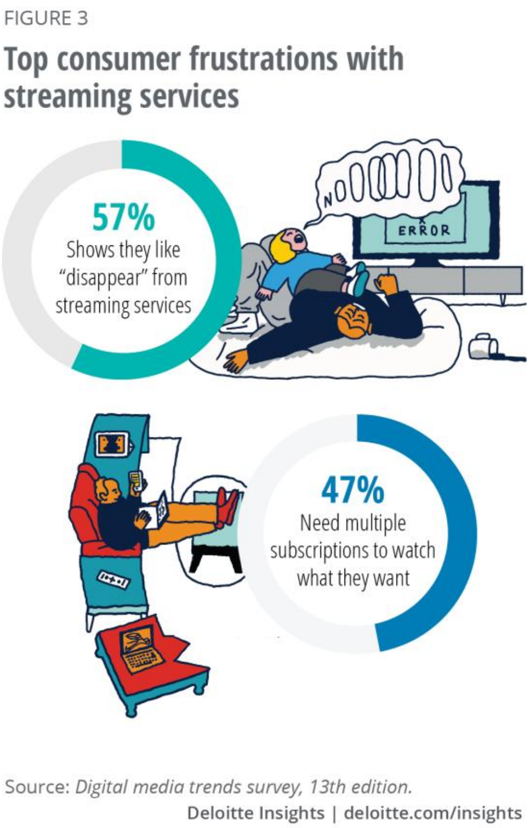

Fig. 51 (Westcott et al 2019)

The problem of capturing audience attention within a competitive and crowded arena is not new for television providers. What is new is the expansion of this problem beyond the schedule and the strategies used to direct viewers away from programmes airing in the same timeslot to other programmes on different networks. The parameters are no longer primarily temporal. Instead of competition by timeslot, there is competition by recommendation and interface user-friendliness. Ever willing to compete in this arena, the IDTVP debuted two trial features in 2019 for users on the Netflix Android mobile phone application, both of which drew attention to its acquired content and the ways in which its interface could enhance the experience of viewing them (Shanley 2019). Both features gave subscribers the opportunity to shuffle the episode order for selected (non-serialised) television programmes, with one option that plays a "random episode" and another that plays a "popular episode" (Hale 2019). In 2020, the company added the descriptor 'can be watched in any order' to programmes with self-contained storylines and no serialisation. Netflix has yet to confirm whether or not these features will become permanent or to which programmes specifically they will apply, but reports state that the examples used in the trial so far include *New Girl*, *The Office*, and season four of *Arrested Development*, all of which can be viewed out of release order (Shanley 2019).

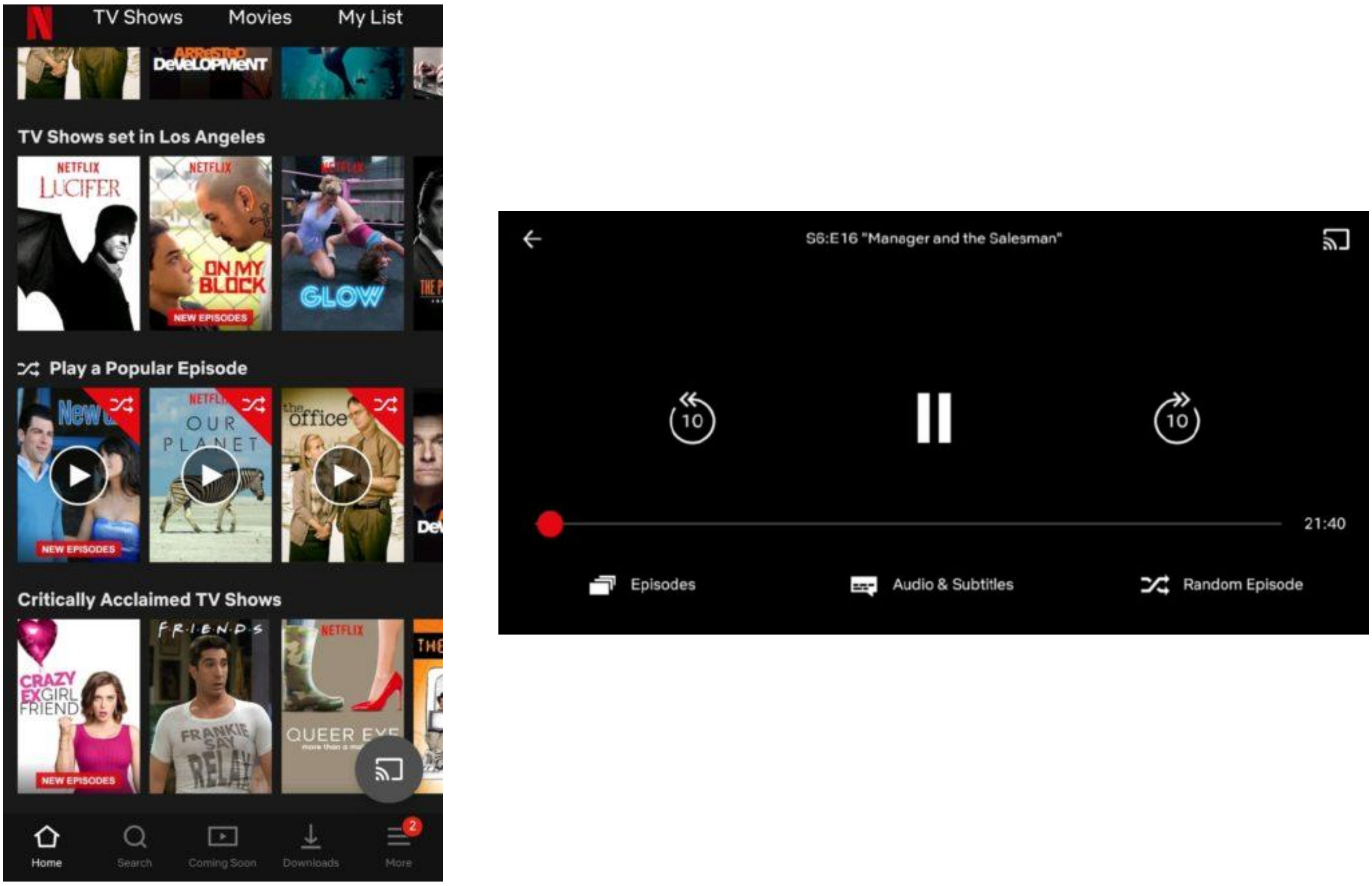

Fig. 52 Stills displaying the 'popular episode' and 'random episode' options (Palmer 2019)

The idea of watching non-serialised shows out of order is not Netflix's innovation. Self-containment is a key element of series programmes and their lack of serial storytelling is a deliberate decision which serves a generic and industrial purpose (Dunleavy 2009). Nevertheless, Netflix's use of its interface capabilities to experiment with the ordering of various acquired shows (of which two of the previously mentioned three examples are) demonstrates its willingness to exploit its catalogue so as to maximise the existing appeal of programmes whose self-contained episodes make it possible for subscribers to watch them in a different order than they were produced.

The 'random episode' option may encourage viewership by signalling to subscribers that the selected shows do not require a continued investment of time or attention because of their non-serialised structure. The 'popular episode' option comes with an implied guarantee of a show's tonal accuracy and appeal, potentially reassuring viewers that their enjoyment of the 'popular' episode will be representative of their potential enjoyment of the entire series. Both features help to highlight the presence of these well-known and expensively acquired programmes in the Netflix catalogue while offering subscribers shortcuts to viewing orders that they could have otherwise achieved themselves with some additional labour. Such features also signal to viewers that the company currently retains the rights to stream former hits like *The Office* (until the end of 2020) from the comfort of its portal, including the novelties of shuffling episodes or revisiting favourites. These novelties differentiate, and add value to, Netflix's streaming conveniences even as it plays the acquired content it heavily relies on.

Finding ways to draw attention to high-profile acquisitions is important, as the networks that originated them are becomingly increasingly reluctant to part with their most successful programmes, choosing to include them in their own IDTV platforms. NBC, for example, declined to renew their licencing deal with Netflix for *The Office* so that it could stream the sitcom on their (then) upcoming service, Peacock (Feiner 2019). *The Office* has been one of the most viewed shows in the Netflix catalogue, accounting for 7.19 percent of all views on the platform from January-November of 2018 (Molla 2018). NBC CEO Bob Greenblatt acknowledged the mutually-beneficial outcome of Netflix's acquisition of *The Office*, saying, "I believe that Netflix has helped make *The Office* extraordinarily popular, and more popular than it was when it was on the network. And they pay us a lot of money for it. If we knew how popular it was going to be before they made the deal, we would have asked for more money from them!" (quoted in Rodriguez 2019). Another sitcom that aired on NBC, *Friends*, was the second most-viewed programme on Netflix in 2018, taking 4.13 percent of all views (Molla 2018). Greenblatt's statement about asking Netflix to pay premium pricing was proven correct when the IDTVP paid AT&T – the parent company of Warner Brothers Studios, who produced and own the sitcom - $100 million to retain the rights for *Friends* for the 2018-2019 period (Rodriguez 2019). When the deal expires, AT&T has plans to exclusively stream *Friends* on its own IDTV service HBO Max, which will include other Warner Media-owned content (Alexander 2018).

The television landscape will continue to expand to include not only a growing number of IDTV services, including the standalone platforms of established media conglomerates which combine the content offered across their various television networks (such as Disney + and the Comcast-owned Peacock) but also the existing bevy of catch-up services and advertiser-funded SVODs that come under the IDTV umbrella. The impact of this growth on the sales and licencing of acquired content is still unknown, but it appears as though the value of popular programmes is increasing and may continue to do so until there is sufficient competition amongst IDTV providers to produce new, exclusively online content.

3.6 Funding and the Cost-Plus Model

Netflix's willingness to pay its most high-profile creators higher upfront fees in exchange for long-term returns is also reflected in its funding strategy. Cost-plus and deficit funding are two of the most common funding models in the television industry. Deficit funding pertains to a network covering between 60-70 percent of a programme's production costs as part of its buying agreement (Griffin 2018). The programme's producers must cover the remaining budget, but retain the rights to their content, which gives them the opportunity to earn revenue in the future through acquisition, syndication, or merchandising. Deficit funding distributes risk between broadcasters and producers (Doyle 2016). In the United States, deficit funding was the predominant model until the 1980s and 1990s, when increasing government regulation and media conglomeration resulted in the vertical integration of television producers and distributors, removing the distribution of risk that required deficit financing in many cases, though it continued as a practice well into the 2000s (Lotz 2019). Cost-plus funding was initially widely used across Europe and the United Kingdom before its introduction into the United States through premium cable channels like HBO (Lotz 2014). It differs from deficit funding in that the commissioning body pays 100 percent of the production costs and gives the producers a supplementary fee (Doyle 2016). In exchange, the commissioning network takes on the financial risk but typically retains primary and secondary window transmission rights (Doyle 2016).

Netflix uses cost-plus to calculate how much money it can spend when purchasing and developing a television series. Under cost-plus, Netflix pays 100 percent of the production costs for any series that it buys and pays the producers of the series an additional sum of up to thirty percent of the production costs, known as a 'premium' (Castillo 2018). In return for a higher upfront pay-out and the security of a fully funded first season, Netflix obtains the rights to the programme (Griffin 2018). Netflix charges production companies an "imputed licence" distribution fee and makes them liable for the payment of residuals (such as pay bonuses) to their cast and crew (Castillo 2018). While Netflix does pay bonuses to creators/producers with each subsequent season of the show, the cost-plus model benefits the company in several ways (Castillo 2018). Importantly, if Netflix owns a programme, it owns worldwide distribution rights (Castillo 2018; Patel 2018). Netflix has been known to offer modified deals, which allow producers to retain some-to-all of a programme's rights if they agree to a lengthy waiting period before licensing the programme and agree to giving the streamer an exclusive global streaming licence of between five to ten years (Patel 2018). This caveat severely limits the benefits of retaining rights ownership because networks and distributors are less incentivised to licence a programme if it has been available for streaming globally (Patel 2018).

The cost-plus model is not without advantages for television producers. Even with ownership rights, production studios often fail to break even after the first season of a programme hits the air. In an increasingly crowded and competitive industry, many programmes also do not accumulate enough seasons to fulfil any earning potential in a secondary market, which is dependent on a programme's longevity and popularity (Patel 2018). Netflix is known to outbid other networks while taking a 'hands-off' approach and giving producers instant access to a global viewership of 140-plus million global subscribers. Even accounting for any algorithmic discrepancies or inaccurate targeting of taste communities, the potential *immediate* audience for a Netflix original programme is likely to be significantly larger than any other individual TV audience. The company's practice of releasing completed seasons also gives its originals a consistent chance of getting *new* viewers either as the IDTVP gains more and more subscribers, or, as existing subscribers discover the programme. A producer's possibility of having a 'global hit' increases on the Netflix platform but it comes at the expense of greater financial compensation.

The upsides of cost-plus are tempered by suggestions that Netflix's projections have persuaded the company to limit the number of episodes in its originals to ten or less per season, and thirty or less in a series' entire run, if the series is live-action, meaning that Netflix has learnt for itself what HBO discovered over a decade prior (Clark 2019). Such conclusions had previously been reached by HBO If a programme is a critical hit, an awards contender, or attracting what Netflix would deem to be a 'justifiable' audience, it is spared these restrictions. It is this exception that has allowed *Grace and Frankie, OITNB, House of Cards,* and *Unbreakable Kimmy Schmidt* to continue past the three-season threshold (Andreeva 2019). Economically, the strategy allows the company to focus resources on new and successful originals and spares them the expense of paying producers season bonuses, which tend to increase substantially after an original's third season (Andreeva 2019).

Netflix gained another reason to prioritise ownership of its commissioned content after its show *One Day At A Time* (*ODAAT*), which it cancelled after three seasons, was revived for a fourth season on Pop TV, a new linear subsidiary of the CBS corporation (Low 2018). Despite a vocal fan base and near-universal critical acclaim (including positive ratings of 97-100 percent on the aggregation site *Rotten Tomatoes*) the three-camera sitcom had failed to attract enough of Netflix's audience to justify the expenditure needed to make another season (Adalian 2019, *Rotten Tomatoes* 2019). After the announcement of its cancellation, CBS made an official bid to Sony Pictures Television (the producer and owner of *ODAAT*) for the streaming rights to the sitcom for its SVOD service CBS All Access, and an offer to produce another season (Adalian 2019). However, Sony's contract with Netflix prohibited it from making *ODAAT* available to any streaming service for at least two years after its cancellation without Netflix's permission (Adalian 2019). To circumvent this limitation, CBS Chief Executive, Joe Ianniello, asked Pop TV's president Brad Schwartz if the network would be interested in negotiating with both Netflix and Sony to allow the CBS Corporation to revive *ODAAT* while satisfying Netflix's stipulation that it only airs terrestrially (Low 2018). Because Sony Pictures Television retained ownership of *ODAAT*, it was allowed to licence the linear rights for its first three seasons to Pop TV (though they also remain in the Netflix catalogue) and produce a fourth season, marketed as a "Pop original", to air in 2020 (Adalian 2019). Additionally, CBS has the right to air reruns of *ODAAT*'s fourth season after its finishes its run on Pop TV (Adalian 2019).

Netflix also takes a show's viewership into account when weighing the pros and cons of renewal, but some subscribers' views are deemed more important than others. The company uses an "Adjusted Viewer Share" (AVS) metric which is gathered over a 28-day cycle (Toonkel, Dotan, and Shah 2019). The AVS "is adjusted to give more weight to viewers who watch a show within 24 hours of subscribing", as well as viewers who have not watched a Netflix original programme in weeks (Toonkel et al 2019). Less weighting is given to subscribers who watch Netflix content on a regular basis (Toonkel et al 2019). The AVS metric shows that Netflix prioritises subscribers that are either brand new or appear at risk of cancelling their memberships. The IDTVP appreciates the analytic value of scrutinizing those subscribers' viewing habits and is willing to allocate its algorithmic resources towards tracking the programmes they consume during the decision-making phases of committing to, or terminating, their subscriptions. Once a show's AVS score has been calculated, it is added to the show's budget, and this overall number is called the "efficiency score" and used by Netflix executives to determine the feasibility of its continued financing (Toonkel et al 2019).

3.7 The Acquisition of Showrunners

Most of Netflix's first original shows were developed by independent studios and then sold to the streamer as part of competitive negotiations (such as bidding with other networks) that allowed the creators to retain majority ownership over their programmes (Lotz 2017). Despite the popularity of its acquired content (as examined earlier) Netflix recognised the necessity of creating (and then fully owning) its original content for long-term subscriber growth and retention. Between 2016-2019, a study by Parrot Analytics found that Netflix had a sizeable lead in the American IDTVP market in terms of their metrics for viewer demand for original content, with a significant jump in demand occurring halfway through 2017 (Parrot Analytics 2019).

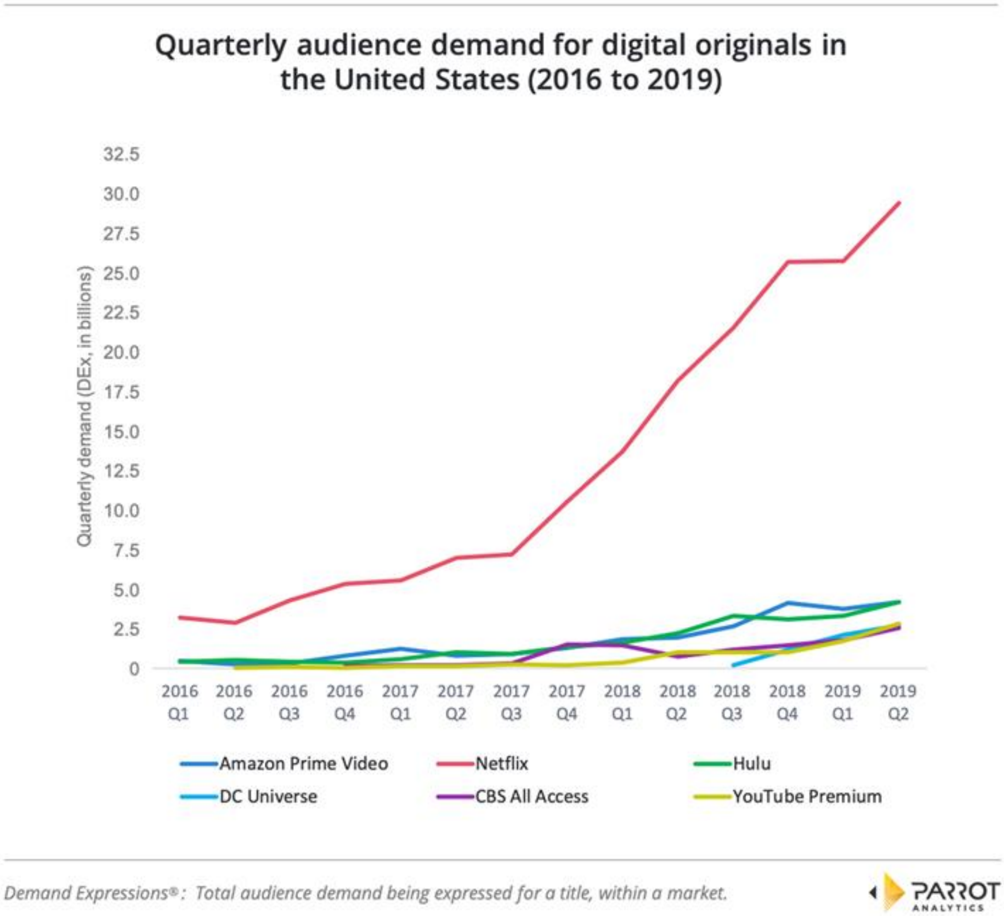

Fig. 53 (*Parrot Analytics* 2019)

To continue to build viewer demand, Netflix began offering what the media termed "mega-deals" (Jarvey 2018). The mega-deals are a strategy of 'recruiting' well-known American film and television writers with proven track records of creating popular programmes by offering them multi-million-dollar contracts and relative creative leeway. Partnerships with the likes of Tina Fey, Ryan Murphy, and Lilly and Lana Wachowski yielded programmes which helped to establish the Netflix brand and draw attention to the streamer's originated content within its domestic market, as well as draw interest from international subscribers familiar with their work because of the popularity of American cultural products (Jenner 2018). Chapter Four and Chapter Five expand on how Netflix's content strategy has adapted to broaden its foreign-language catalogue through international co-production and working with lesser-known local talent. This section explores the ways in which Netflix benefits financially and reputationally from its partnerships with writer-producers.

High-profile writers and showrunners have often been publicly elevated in television – particularly premium cable channel serial dramas – yet Netflix's highly-visible working relationships frame the resulting programmes through narratives of popularity and exclusivity. This framing is due to the company being able to fast-track negotiations with writers and producers by offering larger project budgets and creative autonomy, though these are arguably necessary in order to satisfy Netflix's need for original content.

Netflix's tactics are demonstrated in its dealings with creators like Tina Fey, Lana and Lilly Wachowski, Shonda Rhimes, and Ryan Murphy. In 2014, it was announced the Netflix had purchased two seasons of *Unbreakable Kimmy Schmidt*, a comedy created by Tina Fey and originally intended for her home network of NBC. Fey and NBC had maintained a successful partnership. Not only had Fey spent nine years on its flagship sketch show, *Saturday Night Live*, as both a main cast member and head writer, but she parlayed those experiences into *30 Rock*, a single-camera sitcom that Fey wrote for, starred in, and executive produced over seven seasons. *30 Rock* earned the network 103 Emmy nominations and three wins in the Outstanding Comedy Series category (*Academy of Television Arts and Sciences*).

When Fey and her writing partner Robert Carlock developed season one of *Unbreakable Kimmy Schmidt*, it was with an NBC-owned production company, Universal Television (Travers 2014). Fey and Carlock were in final talks with NBC Chairman Robert Greenblatt and then-NBC president Jennifer Salke (who left the network in 2018 to join Amazon Studios as its new content head) about when to debut their new programme (O'Connell 2015). Greenblatt and Salke were not optimistic about *Unbreakable Kimmy Schmidt*'s potential to attract and retain an audience during what Greenblatt cited as a "very drama-heavy mid-season schedule" for NBC (quoted in Travers 2014). Complicating the release was the comedy's premise, which centred on a young woman exploring adulthood in New York after spending 15 years as a captive in an underground bunker (O'Connell 2015). Fey later remarked that the show "would have been on NBC had this deal [with Netflix] not come together" and that all the networks were "having a little trouble launching comedy across the board" (Fey quoted in O'Connell 2015). Fey's comments clarify the logic behind debuting *Unbreakable* on Netflix. Fey was a seasoned collaborator with NBC, having name-brand recognition, an established fan base, and a reputation as a respected writer. *Unbreakable* had already been optioned, produced, and financed by NBC, who discovered that their own schedule would undermine *Unbreakable*'s success. Shelving the project would be a financial loss for NBC while also denting Greenblatt and Salke's professional relationship with Fey and Carlock. Selling *Unbreakable* to a broadcast competitor was such an unfavourable option that NBC would have preferred to air it and risk it underperforming.

At this point, another scenario presented itself. During Fey and Carlock's final talks with the network, Ted Sarandos and Cindy Holland (Vice-President of Original Content at Netflix) "happened to be in New York" and the project caught their attention (O'Connell 2015). Only a few days later, a deal for the right to stream *Unbreakable* as a Netflix original, despite NBC's funding of the first season and still owning the rights to the programme, along with an order for a second season of the comedy, had been reached (VanDerWerff 2014). As Carlock puts it, "it was the fastest that anything good ever happened to me in the business" (quoted in Stuever 2015). The move was a "win-win", as Greenblatt himself termed it, for all involved (quoted in Travers 2014). Universal Television's position as a subsidiary of NBC allowed Greenblatt to justify the sale from a fiscal standpoint and Netflix's willingness to pay for an additional thirteen episodes – a move considered anathema at the time for most networks with linear channels – helped to justify the move from an artistic perspective. Holland capitalised on the perception that Fey's signature referential humour and intertextuality would best suit Netflix, saying "The very construct of *Unbreakable Kimmy Schmidt*—its offbeat premise, hilarious and rich characters and serialized storytelling—make it a perfect Netflix comedy series" (quoted in Andreeva 2014). Fey and Carlock emphasized their commitment to NBC in an official statement, stating "Happily, we will still collaborate with our long-time partners at Universal Television… We grew up at NBC and will continue to develop broadcast projects with them as well" (quoted in Goldberg 2014). However, Fey's less-guarded remarks reveal a confidence in IDTV streaming services. Speaking to reporters at a news conference to unveil *Unbreakable*, she said, "I know so many people who just, anecdotally, go to Netflix just to watch *30 Rock* and other shows that modern people aren't always at their TV at 8:30 on Thursday to watch. So it just makes more sense than broadcast, I think, for these kinds of shows” (Fey quoted in Stuever 2015).

The rapid pace of the agreement that led to *Unbreakable*’s release did not go unnoticed in the media. Reactions ranged from salacious headlining (“Netflix has saved Tina Fey’s new show from NBC purgatory. Here’s why”, *Vox*, 2014), to savvy rebukes of the show’s merit (“*Unbreakable Kimmy Schmidt*: Too good for NBC, but still not that great”, *Washington Post*, 2015). Regardless, more attention was paid to what the deal indicated about the television landscape in 2014-2015, reigniting debates about the creative restraints on advertiser-funded networks. While Fey and Carlock have indeed returned to their ‘adolescent home’ of NBC, *Unbreakable Kimmy Schmidt* saw the duo partner with Netflix from 2015-2019, during which the show was nominated for the Outstanding Comedy Series Emmy award for each one of its four seasons.

In 2015, Netflix debuted *Sense8*, its first science fiction original programme. *Sense8* began three years prior, as the brainchild of Lana and Lilly Wachowski, the writers and directors of *The Matrix* film trilogy. The siblings had experienced financial success and cultural notoriety for their influence on the sci-fi genre and had garnered a reputation for their idiosyncratic story-telling style, which favoured expensive location-shooting, lengthy run times, and innovative digital effects (Di Placido 2017, Borrelli 2012). Having only worked in film, the Wachowski’s developed the idea for a serialised plot that would explore identity, technology, and connection, with a deliberately diverse cast of characters who lived across the globe. Deciding that such a concept would work best in a television format, they invited their friend J. Michael Straczynski (creator of the sci-fi show *Babylon 5*) on board as a co-creator because of his expertise with the writing and development processes of the television industry (Miller 2015). Together, they wrote the first three episodes of a proposed ten episodes as spec scripts for *Sense8*, all following the central premise of eight ethnically and sexually diverse strangers who share a psychic connection (Arrant 2013).

In October of 2012, the trio lined up several pitch meetings with prospective networks, in a move that was reported by *Variety* as being "The Wachowski's shopping their first TV series" (Littleton 2012). The first meeting was with Netflix. According to Straczynski – the trio's de-facto spokesperson due to the Wachowski's aversion to giving interviews – just a few hours after their meeting, Netflix returned with an offer to buy *Sense8* and fund the entire 10-episode first season (Arrant 2013). Although Lana and Lilly deserve credit for co-writing and co-directing the entire first season, Netflix publicised *Sense8* as a show 'by the Wachowskis' in order to capitalise on the siblings' cultural capital and on pubic curiosity around famous filmmakers creating television for the first time. Additionally, the Wachowskis' attachment served to legitimize *Sense8*'s narrative focus on LGBTQIA+ representation through the media attention focused on the Wachowski's identities as high-profile transwomen in Hollywood.

When *Sense8* debuted on Netflix in 2015, the company had established something of a reputation as a champion of ethnic and gender diversity on-screen, thanks in large part to the success of an earlier original programme, *Orange Is The New Black* (*OITNB*). Premiering in 2013, *OITNB* revolves around a group of inmates in a women's prison. The inmates are not only diverse from a fictional standpoint – with characters from across the socio-economic spectrum, ethnic communities, and sexual orientations – but included a diverse range of actresses of Latina, Asian, and African-American backgrounds. Particular attention was paid to Sophia Burset, a transgender inmate played by Laverne Cox, herself a transgender woman. The programme debuted during a moment of social visibility for transgender people, with criticism against the inaccurate portrayals of the transgender community in the media and the use of cisgender actors in transgender roles (Mullally 2015). The first season of *OITNB* coincided with the Oscar win of Jared Leto for his depiction of a transwoman in the film *The Dallas Buyers Club*, amid backlash from the transgender community. The inclusion of a transgender actress playing a transwoman among an already-varied female-led cast was lauded by the press and activists, and the debut of *Sense8* had a similar cultural saliency when cis-male actor Eddie Redmayne was nominated for an Academy Award for playing a transwoman in the film *The Danish Girl* in 2015. Netflix's awareness of the Wachowski siblings' positioning as social activists and artistic trailblazers allowed it to capitalise on their legitimacy during these moments of cultural outcry about the lack of authenticity in LGBTQI narratives. In seizing the media momentum about transgender people's representation and directing it towards *Sense8, OITNB*, and the Wachowskis, Netflix and its content was able to benefit reputationally as a progressive and forward-looking network.

Netflix attempted to sustain its 'social justice' narrative throughout *OITNB*'s entire run. When the show's seventh and final season premiered in 2019, one of the storylines involved the creation of the 'Poussey Washington Fund' (named after the deceased character Poussey) that lends microloans to formerly incarcerated women wanting to start their own businesses. A promotional video for the season included fans delivering emotional anecdotes about how *OITNB* had given them LGBTQI representations, affirmed their gender identities and sexual orientations, and educated them about the injustices of the American prison system. The end of the video revealed that Netflix had created a real-life Poussey Washington Fund that would raise money for eight non-profit groups whose work involved ending mass incarceration, protecting the rights of immigrants, and reforming the justice system (Strause 2019). *OITNB* creator Jenji Kohan said that the fund allowed the "character to live on and continue to make an impact after the show has come to an end" (quoted in Cronin 2019). In response to the announcement, *The Hollywood Reporter* said that "The Poussey Washington Fund includes organizations that focus on many issues that have been tackled in the ground-breaking series" (Strause 2019). *CNN* wrote that the fund had allowed "life to imitate art in one of the most powerful ways" (Friedlander 2019), while *Refinery29* commented that "taking their activism offscreen seems like a natural next move for the Netflix show" (Reilly 2019). The press's positive reaction to the fund endorsed *OITNB*'s credentials as an LGBTQI trailblazer with its finger on the pulse of identity politics and a legacy of real-life activism, despite the high likelihood that Netflix's motivations were entirely oriented towards receiving this media validation.

Press interest in Netflix's 'disruptive' impact has been a consistent aspect of American media discourse. When Disney's landmark acquisition of Fox was announced in December of 2017, there was wide speculation that it was a pre-emptive move against Netflix, which had landed a blow to the conglomerate by 'poaching' one of its most profitable showrunners, Shonda Rhimes (Desta 2017, Koblin 2017). Rhimes spent fifteen years with ABC and was the architect behind three of the network's most viewed shows – *Scandal*, *How to Get Away With Murder*, and *Grey's Anatomy*, the latter of which has alone made the network $2 billion (Littleton, 2017). Speaking on the new partnership (worth a rumoured $25 million for Rhimes and $100 million for her production company) Rhimes said that working conditions with a platform like Netflix were "freeing" and supported the commonly-held assertion that the pay scale and creative autonomy were better on Netflix than on broadcast television (quoted in Littleton, 2017). In 2018, Ryan Murphy, the executive producer of seven Fox/FX shows including *Glee* and the *American Horror Story/Crime Story* anthologies, announced that he would be partnering with Netflix on a $250 million contract. Murphy, who once joked that he would be "buried on a Fox lot", told the *Hollywood Reporter* that he left a pitch meeting with Netflix's chief content officer Ted Sarandos feeling like he had "seen the future" (quoted in Otterson 2018). Such comments from creators themselves show the success of Netflix's self-mythologizing strategy in making itself a viable and legitimate television partner.

According to sources at *Variety*, Netflix had approached Murphy during his contract renewal negotiations with Fox, which coincided with Disney's Fox merger (Birnbaum and Littleton 2018). The ensuing uncertainty about Murphy's role in the new Fox structure made Netflix's offer even more appealing. Murphy has said publicly that Rhimes' move to Netflix partly inspired his decision because the deal was so unexpected, commenting, "even people within Fox were saying, 'well, the world has changed overnight'" (Murphy quoted in Surrey 2018). Murphy also stated that his and Rhimes' relationship with Netflix was meaningful because it allowed him, a gay man, and Rhimes, an African American woman, the chance to be financially rewarded for their creative contributions in an industry that has "indoctrinated [us] to think we weren't worthy of being paid, and now we realize, 'Oh no, we very much are,'" (Murphy quoted in Rose 2018). These assertions speak to Netflix's ability not only to challenge established procedure by 'luring' talent towards their service, but also to publicise these manoeuvres in a way that aligns them with existing media discourses around the progressive and disruptive potential of IDTVPs.

Procuring well-established American showrunners was necessary for Netflix's early domestic growth and remains an important part of its strategy, particularly for retaining existing domestic subscribers. Showrunners like Rhimes and Murphy have brand-name recognition because they helmed popular programmes that accrued large fanbases. Additionally, programmes popular in the United States tend to perform better internationally thanks to the familiarity that foreign markets have with the English language and with imported American media. Having established heavy market-saturation for its US subscriber base, in large part due to its explosion of originated English-language content, Netflix subsequently added a 'stunt casting' approach to its commissioning strategy. Having covered its basis with experienced writers, the company set its sights on recruiting celebrities not known for creating film or television shows.

In 2018, Netflix announced a much-publicized multiyear deal with former US president and first lady, Barack and Michelle Obama, to develop "scripted series, unscripted series, docu-series, documentaries, and features" for the streaming service, through the Obamas' newly created production company, Higher Ground Productions (Shear 2018). The partnership sees the pair producing a serialised period drama set in post-World War II New York, titled *Bloom*, and a scripted anthology series named *Overlooked*, among other film projects (Koblin 2019). As a former head of state and First Lady, the Obamas' involvement with Netflix is unusual. The pair are internationally recognised public and political figures and remain the subject of public curiosity, especially in the wake of the 2016 American election and the racial tension that ensued. In 2020, Netflix announced a similar multiyear deal with the Duke and Duchess of Sussex, Meghan Markle and Prince Harry, to produce a range of film and television content for the streamer (Sweney and Lee 2020). The news came seven months after the couple publicly stepped back from their roles as senior members of the British Royal family, a decision that caused a media frenzy at the time. Like the Obamas, the royals' partnership with Netflix is considered uncommon for similar reasons of institutional novelty and huge public interest in the couple.

As of 2020, Netflix negotiated two further high-profile partnerships with Kenya Barris and the writing duo of D.B Weiss and David Benioff (Ates 2020). Barris is the creator and executive producer of the popular sitcom *Black-ish* for ABC and its spin-off series *Grown-ish* (Freeform) and *Mixed-ish* (ABC). As part of his three-year USD$100 million overall deal with Netflix, Barris has thus far created *#blackAF*, a comedy verité focused on a fictionalised version of Barris and his family. News of Barris' move to Netflix coincided with ABC's public decision to indefinitely shelve a 2018 episode of *Black-ish*, written by Barris, that the network had initially refused to air (Holloway 2018). The episode, titled 'Please, Baby, Please', centred on the aftermath of Donald Trump's 2016 presidential victory and the controversy regarding American professional athletes kneeling during the national anthem in protest over police brutality towards African Americans (Thorne 2020). Press outlets insinuated that the family-friendly ABC network refused to air the episode because its political message was deemed too controversial (Holloway 2018, Thorne 2020). Barris, whose programmes revolve around themes of the African American experience in the United States, said that he and ABC had "creative differences", but sources at outlets like *Variety* reported that the "argument over the episode was allegedly a significant factor behind his departure for a mega overall deal at Netflix later that same year" (Thorne 2020). The incident with Barris again contributed to the narrative that Netflix, as an IDTVP, is more forward-thinking and less creatively restricted than existing B/C/S networks, even though no direct evidence had been presented to support the insinuation in this case.

Weiss and Benioff, both famous (or perhaps infamous) as the executive producers and writers of HBO's cultural juggernaut *Game Of Thrones,* signed a multi-year overall film and television deal with Netflix in 2019, worth a reported $USD200 million (Goldberg 2019). Benioff and Weiss had previously secured a deal with Disney and Lucasfilm to helm a trilogy of *Star Wars* films and were in development on a serial drama with HBO titled *Confederate* (Whitten 2019). However, shortly after the pair accepted their partnership with Netflix, their involvement with both HBO and Disney/Lucasfilm ceased. *Confederate* was scrapped after HBO's president of programming Casey Bloys "hinted that any projects the showrunners had with HBO would be cancelled if they signed with another network" (Whitten 2019). Benioff and Weiss stepped away from *Star Wars* two months after signing their Netflix contract, claiming they "could not do justice to both *Star Wars* and our Netflix projects", this suggestion supported by a media report that Lucasfilm president Kathleen Kennedy lacked faith that the duo "could develop a sci-fi trilogy while also overseeing film and TV projects at Netflix" (quoted in Goldberg 2019).

Netflix's dealings with some of Hollywood's most successful creators demonstrate the company's willingness to outspend its competitors in order to build its slate of Netflix-originated, English-language content. Television writer-producers create the valuable intellectual properties which allow Netflix to become less reliant on acquired content (and the fees and territorial rights that accompany it) in favour of enlarging its collection of Netflix-originated programmes. That the streamer has been successful in negotiating these partnerships demonstrates its position as a key content creator in the American televisual marketplace. Significantly, Netflix was the first television provider to offer writer-producers the kind of financial compensation that more closely reflected their potential network profitability. For example, Netflix's first mega deal of this kind with Shonda Rhimes offered her USD$150 million for an eight-show deal, in comparison to the USD$10 million per year that Rhimes was earning from ABC (Laporte 2019). While ABC's amount was substantial, it represents a minor portion of the revenue that Rhimes' programmes made for ABC, which is reported to be over USD$2 billion (Laporte 2019). As an advertiser-supported broadcast network, ABC has very different expenditure needs and revenue streams to a subscription-funded streaming service like Netflix, so it is unlikely that Netflix was offering Rhimes an estimate based on her profitability with ABC. However, Netflix was able to identify a weakness in the market (the salaries of television showrunners and writers whose ideas are paid for and purchased by their host network) and overcorrect it to its own advantage, even taking into account that the streamer's huge upfront sums include compensation for its writers' lack of residual and backend earnings.

Netflix's 'mega deals' strategy is becoming increasingly common among television providers because the mergers between the media conglomerates that own (American) networks have concentrated more funding between fewer buyers. These buyers are also looking to purchase content for their consolidated streaming services, meaning that parent companies like WarnerMedia and Comcast are offering contracts that are able to be more initially lucrative for writer-producers (and competitive with Netflix) because of the increasing use of the cost-plus model for streaming content (Laporte 2019). Between 2018-2020, Amazon signed overall multiyear deals with Amy Sherman-Palladino for an undisclosed amount (writer and creator of *Gilmore Girls* and *The Marvellous Mrs. Maisel*), Phoebe Waller-Bridge for an estimated USD$20 million (writer and creator of *Fleabag* and *Killing Eve*) and Lisa joy and Jonah Nolan (writers and creators of *Westworld*) for a projected $USD200 million (Petski 2019, Whitten 2019, Goldberg 2019). In the same time period, Warner Brothers Television signed a USD$400 million deal with Greg Berlanti (the person behind *Arrow, The Flash, and Supergirl*) to produce shows for subsidiary HBO Max, as well as a USD$250 million contract with J.J Abrams (*Alias*, *Lost*) (Clark 2019, Goldberg 2019). Universal TV announced a USD$60 million deal with *Vampire Diaries* creator Julie Plec, as well as a USD$125 million five-year deal with Mike Schur (showrunner of *Parks and Recreation*, *Brooklyn Nine-Nine*, and *The Good Place*) (Goldberg 2020, Katz 2019). These examples show that Netflix's strategies for IDTV are proving influential among the titans of the American television industry. The high-profile and high-cost showrunner partnerships initiated by the streamer may represent a continuing trend in its domestic market since the industrial conditions of network consolidation are suited to the mega-deals model of publicity, exclusivity, and hefty contracts.

3.8 Conclusion

It has been over a decade since Netflix launched its streaming service, and eight since the debut of the first ‘Netflix original’ in 2013. The company has moved out of its infancy as a content creator, with over 1500 hours’ worth of commissioned programming in its catalogue and a 2019 commissioning budget of USD$15 billion (Rodriguez 2019). These strides have come at a cost. As of 2019, the IDTVP is USD$20 billion in long-term debt, which includes USD$15 billion for obligations pertaining to streaming content (Spangler 2019). Later in 2019, the company announced plans to raise a further USD$2 billion in debt, with most of this sum going towards commissioning and production costs as well as the purchase of streaming rights for its acquired content (Netflix Investors 2019). Nonetheless, the commissioning and ownership of original content is going to remain a crucial part of Netflix’s strategy for long-term stability. Cost-plus looks likely to remain the most viable funding model, not only for the IDTVP, but for all major American networks. The streamer’s adoption of cost-plus, more than two decades after HBO popularised it in America, demonstrates the continued economic impact of media consolidation, vertical integration, and subscriber-funded models on the industrial conditions of television production.

As of 2020, Netflix has over 73 million domestic subscriptions. It is a number that represents the growth of IDTV in the United States and speaks to how popular the ‘Netflix experience’ has become. Netflix first used its relationships with established media conglomerates to make initial inroads into the industry by acquiring their content, before leveraging its business model and digital presence to become increasingly powerful. The IDTVP’s ambiguous network identity allows it the versatility to work with established industry veterans and celebrities with no previous television experience, while its large subscriber base (domestically and internationally) and large commissioning budgets make the streamer an attractive partner for both types of creators. The results of its commercial manoeuvres, and the industry’s response to them, have been increased competition between Netflix and its early business partners, as well as mutually beneficial acquisition and co-production contracts. Nevertheless, Netflix’s success in establishing IDTV in the American market would not have been possible without the innovations of premium cable networks. HBO’s commissioning strategies regarding high-end complex serial dramas were particularly informative and influential for the US television industry. They demonstrated the feasibility of the subscription-funded model, the importance of exclusivity, the value of seriality in cultivating viewer loyalty, and the originality that could be achieved with high budgets, little-to-no censorship, and zero commercial interruptions. HBO’s consequent brand distinction by way of its high-end programming laid the groundwork for Netflix’s attempts at brand differentiation by way of its IDTVP’s interface and recommendation software rather than its original content. Although Netflix’s escalating role as a content creator has made a sizeable impact on its domestic industry, its lasting contribution was proving the effectiveness of IDTV delivery and viewing protocols, specifically for programmes with complex and serial narratives.

Chapter Four: Netflix Abroad

4.1 Introduction

This chapter examines Netflix's strategies in various non-US markets. It discusses how Netflix's international presence has helped to instigate changes in policies and practices with regards to the regulation of IDTVPs (IDTV providers) and their reception across various national industries. It argues that the company is representative of the broader expansion and normalization of IDTVPs internationally. Netflix's successes and challenges are examined in chronological order through its entry and expansion into Brazil, the United Kingdom, India, and the African regions of sub-Saharan Africa (SSA) and the Middle East and North Africa (MENA). Particular attention is paid to Africa in this chapter, with case studies following Netflix's operations in South Africa, Nigeria, Saudi Arabia, and Jordan. The broad focus on Netflix's continental activities and the use of multiple country case studies is a deliberate choice meant to highlight the differences in Netflix's approach regarding Africa. Unlike its strategy with countries in other markets, Netflix's commissioning objectives in each of the four African countries discussed are meant to metonymically represent the African continent as a whole, especially in Netflix South Africa. There is a discrepancy between Netflix's strategy of pursuing local specificity in its South African original content and that content's promotion as a metonymical representation of SSA in general. Netflix recognises the national specificity of Brazil, the UK, and India, even as it treats each of these countries as 'flagships' for their respective continents. Brazil's programming is primarily in Portuguese, making it distinct in a continent where Spanish is the most spoken language. The UK's mature television industry has a successful history of cultural exportation of its English-language programming, ensuring that Netflix's strategies and objectives in the UK are different to those in non-English-language European territories. India is the second largest country in Asia in both land mass and population, beaten only by China, which is likely to remain impenetrable to Netflix for the foreseeable future. India's escalating smartphone market and increasing familiarity with video streaming represents a huge growth opportunity for the IDTVP, even as the economic, cultural, and linguistic idiosyncrasies of its television sector differentiate it from other countries in the Asian market. Furthermore, the SSA/MENA section foregrounds the themes and challenges that are specific to the commissioning and discursive framing of Netflix's first SSA original programme, *Queen Sono*, whose thematic purpose as a culturally-specific African programme is discussed in Chapter Five. All chosen case studies, while non-exhaustive, build on the technological strategies outlined in Chapters One and Two, as well as the industrial lessons learnt from Netflix's operations in its domestic market, to demonstrate that Netflix's adaptability is an advantage that enables it to tailor its strategies to international markets, despite disparate levels of infrastructural development, local competition, and regulation.

4.2 An Overview of Issues facing Netflix's International Operation

When Netflix first began producing original content, comparisons were made between the streamer and American premium cable channels (predominantly HBO), with their main similarity being a reliance on monthly subscriptions (Lima et al 2015, Sim 2016, Radosinska 2017). As its premium cable network competitors had demonstrated, the primary consideration in attracting and retaining monthly customers was the provision of high-end original programming (Dunleavy 2018). The secondary consideration was how best to price and structure subscription payments to counterbalance the costs of producing original content, which is often contracted over several years and thus fixed, at a rate commensurate with fluctuating subscriber numbers. However, Netflix's business strategy also relies on manufacturing the somewhat un-quantifiable qualities of value, choice, and experience. In addition to original output, Netflix has to account for consistently providing "compelling content choices", a "quality experience for selecting and viewing TV series and movies", and the requirement that subscribers "perceive [our] service offering to be of value" (Netflix SEC statement 2018, 3). The risks for Netflix thus also include the features of its portal, which enable a user-friendly and 'valuable' viewing experience. These risks relate to the functionality of the interface, the accuracy of the recommendation algorithm, the speed and quality of high-definition video streaming, and the widespread international availability of the Netflix service. Consequently, Netflix's potential weaknesses are technological threats, infrastructural blockages, and internet-outage failures, anywhere in the world, outside the company's control, which can compromise its overall service. Netflix's own software systems and those of the third-party partners it relies on for the transmission of its video are vulnerable to cyber security attacks, including the hacking of subscribers' payment information or the leaking of the company's intellectual property. For instance, as discussed in Chapter One, one of Netflix's most prominent third-party partners is Amazon Web Services (AWS). AWS, a subsidiary of Amazon, is one of the largest cloud computing services in the world. Netflix has operated the bulk of its computing on AWS since January of 2016 – after seven years of gradual cloud migration on to the service – and its software architecture has been built to be compatible with AWS (Izrailevsky 2016). Should there be any major disruptions to AWS (deliberate or accidental) Netflix's "operations and business would be adversely impacted" (Netflix SEC statement 2018, 8). While all content creators in the television industry may encounter viruses and theft, Netflix's reliance on the internet makes it more vulnerable. The importance of pro-internet rhetoric to Netflix's brand identity would also make any substantial internet-related failing potentially more prominent in comparison to networks with linear channels. Technical difficulties and outage concerns are amplified for Netflix because of its international scale. Netflix has to account for a variety of ISPs in each of the 190 countries in which its service is available, including mobile broadband providers which, for places like India and South Africa, are more important in the context of video streaming. The range of technological and internet-related difficulties posed in different markets are discussed in more detail throughout the rest of this chapter.

Netflix's IDTV competitors have the additional advantages of wealthy parent companies, thanks in large part to increasing media consolidation. Disney, Comcast, Warner Media, and Amazon all have decades of existing capital, and in the case of Disney and Amazon, have alternative income streams in the form of licencing revenue, delivery services, and merchandising. Their industry longevity means they likely have more liquid capital to invest in marketing, research and product development, and commissioning for their IDTV services, as well as existing relationships with industry players which may result in preferential terms and treatment, all of which were already applicable for companies with existing linear channels. By Netflix's own admission, it must manage the "growing complexities" of cultivating proficiency across the "creative, marketing, legal, financial, licensing, merchandising" aspects of content production (SEC statement, 2018, 5). Established conglomerates may also offer more competitive introductory subscription rates as their diversified sources of income or existing assets help them to withstand initial losses on these OTT services. Furthermore, the name recognition that accompanies longevity helps to attract new customer attention and trust, in addition to these companies' existing bases. These circumstances may allow internationally-available IDTVPs to more quickly close the distance between themselves and Netflix. Crucially, media conglomeration has meant that Netflix's IDTV competitors have access to larger volumes of original content, as well as ownership of production companies and studios which enable them to create more original programming. In response, Netflix is developing a direct commissioning strategy in non-US markets in order to create and control more original programming, which also enhances its brand as a provider of 'internationally local' content.

Netflix currently operates in 190 countries. Netflix's international operation makes it susceptible not only to the practical and legislative conditions of various national television industries (local production companies, contracts, content quotas, new and existing national competition) but also to the technological challenges of the particular local markets it is operating within. It not only has to remain cognizant of any laws around data, streaming, and piracy, but must also account for the availability of reliable internet providers in each of its operating countries. Additionally, it must ensure that its interface is equipped with accurate language support for navigation, searching, and subtitles (through the PPP programme discussed in Chapter One) with a culturally tailored catalogue for each country.

Some potential problems of international operation also include government censorship in accordance with cultural or religious beliefs, as well as the threat of political unrest and the changing regulations that accompany new state leadership or evolving audio-visual environments. These changes may include intellectual property laws, lenient anti-piracy laws, or anti-corruption legislation, which require swift compliance from the streamer in whichever market they occur. There is also the chronic risk of fluctuations in currency exchange rates, which may negatively impact Netflix's profit margins. The company must keep up with its tax obligations in each country and ensure that it maintains safe and secure payment methods. Furthermore, Netflix must manage the mobilisation and cost of maintaining staff in various territories with the necessary expertise in the legal, financial, and technological regulatory requirements of the 190 countries in which it operates. The width and breadth of Netflix's international reach thus requires massive, consistent, and costly upkeep. These considerations were made possible because of Netflix's flexibility and the adaptability that allows it to move between its roles as a software company, a delivery platform, and a content creator, depending on the market it is in and its objectives at any given time. Consequently, the considerations provide a large number of potential difficulties that may or may not be within Netflix's direct control because of the diversity of jurisdictions in which it operates and the large range of factors it must account for.

In addition to these technological and regulatory issues, the network must account for the huge economic drain of commissioning original material across various international markets, a crucial part of its strategy to increase the number of Netflix-owned programmes in its catalogue, which enhances its appeal to non-US subscribers and bolsters Hastings' proclamation of his company as a "global internet TV network" (Netflix 2016). This 'internationally local' commissioning and branding strategy lessens Netflix's reliance on acquired content (now increasingly owned by the parent companies of its IDTV competitors) in the process, but poses the overarching financial, creative, and logistical concerns of original content creation in a multitude of non-domestic territories.

4.3 Netflix in Brazil

4.3.1 A Slow Start

In 2011, Netflix began its expansion into South America. It became available on September 5th of that year in Brazil, Colombia, Argentina, and Chile, with Netflix's service rolling out to the continent's remaining 10 countries by the end of the year (Musil 2011). Less than a year later, in May of 2012, Netflix's CFO David Wells conceded that growth in the region had been underwhelming (Fritz 2012). Wells blamed several technological issues, such as slower broadband speeds and a lack of banking infrastructure that made it difficult to process recurring debit/credit card payments, but also pointed to a cultural unfamiliarity with the idea of IDTV (Fritz 2012, Frankel 2012). As Wells commented, "The key thing we have learned with Latin America is that when a market has a competitor set, that may actually help us ... [so we] don't have to convince or explain to people that click-and-watch, Internet-delivered entertainment will actually work" (Wells cited in Fritz 2012). Wells' comments point to the importance of normalising IDTV practices within new markets and the equally necessary part that cultural saturation plays in developing the expectations of potential subscribers.

These concerns were particularly true of Brazil. In 2012, Netflix's Chief Communications Officer Joris Evers said that the country's biggest issues were that "video subscription services are new to Brazil and as a result, it takes time to educate people about how easy Netflix is to use, how safe it is" (cited in Stewart 2012). At the time of Netflix's entry into the country, its primary pay-TV competition was Sky, which offered its cheapest bundle of 151 channels (including acquired HBO programming) for Brazilian real (R) R$159 (Dias and Navarro, 2018, 26). Netflix entered the market offering a R$14.90 subscription for access to one screen and standard-definition video quality (Dias et al, 2018, 26). As of 2018, Netflix offers its now-standard additional packages – one with access to two screens and high-definition playback (available at R$27.90 per month) and one with access to four screens and 4K playback (available at R$37.90 per month) (*AM Post* 2017). Netflix's competitive advantage pertaining to price point was negated by several institutional factors. Brazil, like other South American markets, was hindered by a lack of reliable and fast internet connections across the region, resulting in poorer connectivity and lower-quality video streaming capacity (Dias et al, 27). Additionally, most Brazilian homes lacked the expensive hardware (in the form of smart televisions) to cast/stream Netflix, meaning that it was primarily viewed on laptops. Cultural factors also hindered quick adoption. Audiences were not accustomed to paying for video content in a region where broadcast television was popular, local content was widely available, and DVD rentals remained popular (Dias et al 27-28).

Importantly, the payment methods used by Netflix – via credit or internet-enabled debit cards – were highly limited in Brazil, leading Reed Hastings to blame slow growth in the region on its "tremendous payment complexity" (quoted in Stenovec 2014). This blame was well-placed. Brazil's online marketplace is heavily regulated by the government, convoluted legislation, and national banks, whose consumer-business transactions are geared towards physical invoicing and in-person validation of internet purchases, thus disincentivising online banking (Netflix, Letter to Shareholders, 24th July 2014). This hurdle elicited a creative solution from Netflix, which introduced gift cards for Brazilian consumers in 2014 as a way to circumvent a lack of credit cards and online-payment methods:

Fig. 54 (Stenovec 2017)

Speaking on the roll-out of gift cards, Hastings identified the net positives of incentivising trials and encouraging brand awareness in established countries by “providing an easier alternative for consumers to join Netflix in markets with developing online payments” such as Brazil and Mexico (Netflix, Letter to Shareholders, 21st July 2014). The problem of billing in the region led Netflix to find alternative solutions that address other quandaries. An instance of this occurred in May of 2018, when Netflix negotiated a multi-year deal with Telefonica, one of the largest telecommunications conglomerates operating in South America (Del Valle 2018). The deal allows Telefonica’s 131 million Latin American customers - 97 million of whom reside in Brazil - to pay for a Netflix account as an add-on to their Telefonica bill (*Telefonica.com* 2018). The Netflix app will also be integrated into Telefonica’s pay-TV boxes (for customers who have smart TVs), accessible from its own Moviestar Play OTT service (for customers using their laptops) and added to select mobile phone data plans that permit Telefonica customers to stream Netflix content at no additional use of their data allowance (*CSI Magazine* 2018).

4.3.2 *3%* and *The Mechanism*

Since 2011, Brazil has become a modest success story, with over 71 percent of internet users in the country reportedly having used the Netflix service and 57 percent of those being primary account holders (*RBC Capital Markets,* 2016). Despite the increase in growth, Netflix’s approach to Brazil demonstrates the flaws in its international business plan. It entered the region with the same data-based strategies that had proven successful in North American markets without fully accounting for the cultural and socio-economic factors that underpin the country’s limited televisual infrastructure. Because of these limitations, Netflix’s technological advantages – its interface, customization, and on-demand convenience – were not as appealing to Brazilian viewers. The company’s Brazilian-made Portuguese content was minimal, especially compared to the abundance of local programming found on free-to-air Brazilian television. Netflix’s underestimation of local preferences slowed its initial growth and revealed the need for more targeted national strategies, as is evidenced by its two current original Portuguese-language productions.

Netflix's first offering was the 2016 science fiction serial drama *3%.* Set in a dystopian Brazil, it follows a group of young adults competing for selection to escape the impoverished mainland and live in a virtual paradise offshore. Despite its first season debuting in November of 2016, the original pilot script of *3%* was written in 2009 by the show's creator Pedro Aguilera, and in 2011 a pilot episode was filmed and released on YouTube by the Brazilian production company Boutique Films, which had "experience in producing for US companies" (Mango 2015). Despite this attempt to secure financing for the series, "at least ten networks" declined to pursue the project (Rocha 2017). Seeking foreign interest after "no buyer in Brazil… picked up the series", Aguilera sent the pilot episode to international media outlets, among them *Wired Media*, whose story about the programme brought it to the attention of Netflix's Vice President of International Originals Erik Barmack, who selected *3%* as the IDTVP's first Brazilian original (Shaw 2017). *3%* appears to have been a safe choice for Netflix**.** Having been conceived by a Brazilian writer, produced by a Brazilian company, and pitched for a wider Brazilian audience, the show gave Netflix the assurance of cultural locality. Its science fiction genre made it niche enough to appeal to Netflix's target demographic of middle-to-high income Brazilians and the special effects the show would require may have made its creators more receptive towards Netflix's offer of funding. In addition to subtitling, Netflix made *3%* available with English dubbing, allowing the show to 'travel' better with non-Portuguese speakers in the hope that the show would find a wider international audience. Briefly discussed in Chapter One, dubbing is a costly post-production internationalisation strategy which may, for some viewers, undermine the cultural locality and specificity that Netflix is attempting to capture, the implications of which are discussed further in Chapter Five.

In 2018 – after *3%* was renewed for a third season – Netflix released its second Brazilian original, *The Mechanism*, a serial political drama depicting a fictionalised version of the real-life "Brazilian car wash" corruption scandal (Watts 2017). The series of events implicated dozens of high-profile government officials in a money-laundering scheme that began when executives at Brazil's state-owned oil company began accepting bribes, eventually leading to the imprisonment of the country's former president Luiz Inacio Lula da Silva (BBC News

2018). As the scandal was currently ongoing, *The Mechanism* has received international news attention and heated responses from Brazilian politicians and journalists, including a twitter campaign urging users to delete Netflix (#DeleteNetflix) over claims that the streamer misrepresented the scandal (Mango 2018).

3% and *The Mechanism* depart from the trappings of Brazil's most popular televisual product – the telenovela – which has a five decade-long history in the country. Telenovelas are long-form serial melodramas which resemble soap operas in genre but have a finite number of episodes (varying from 80-180 per production) with which to complete their story. In Brazil, telenovelas have amassed widespread public appeal through their “realistic mode of representation” and “active role in the discussion of political and social problems” (Porto, 2011, 64). Both Netflix programmes have seasons consisting of between 8-10 episodes, contrasting Brazilian telenovelas which typically run multiple one-hour episodes per week. Both feature grim premises and a 'gritty' aesthetic that favours natural lighting and muted colours, opposing the bright studio lighting and saturated colour palette used in telenovelas.

Despite these differences, *3%* and *The Mechanism* both reflect Netflix's attempt to compromise its industrial approach in countries without cable, satellite, and IDTV saturation and the abundance of choice these different platforms and services provide. Countries with up-to-date delivery infrastructures are more likely to be receptive to the variety and newness of Netflix original content because of the lack of barriers to accessing the service, in addition to locally-available IDTV. Markets like Brazil have fictional television programming (characterized by telenovelas) with longstanding popular appeal because of their unique national identity, regularity, and longevity, supported by a decades-long “near monopoly” over the largest broadcast and pay-TV networks in Brazil by mass media conglomerate Globo (Shaw 2017). For these reasons, as well as the lack of infrastructure and public familiarity with IDTV and Netflix in particular, viewers may have been less inclined to find Netflix-exclusive content appealing when the company first entered the region (Shaw 2017). As Netflix is both unable and unwilling to compete with Brazilian telenovelas, its originals in the country have attempted to service an under-served minority of viewers with the wealth and resources to access the Netflix service and the desire to consume Brazil-specific Portuguese drama whose subject matter may be politically contentious or of niche appeal. Netflix's actions in Brazil represent its attempts to strategize over the long-term. It recognises that one of its strongest differentiators as a content provider – its delivery portal and the affordances it provides – lacks both consumer interest and practical efficacy when Netflix is operating in a country without the necessary economic and physical structures to enable streaming, and thus, the familiarity with, and demand for, SVOD services. It has attempted to find solutions through partnerships with Telefonica and alternative payment methods via gift cards. In markets with homogenous and well-established television formats, Netflix's creative strategy of diversification is not as tenable. It is troubleshooting this by attempting to fill niche gaps in the Brazilian market with programmes that it hopes will appeal to the segment of Brazilians with the interest and financial means to find value in Netflix, as *3%* has with younger Brazilian viewers (Shaw 2017).

The streamer is also remaining strategic with its allocation of resources in Brazil in terms of investing in Portuguese language shows and internet infrastructure. In the short-term, this caution allows Netflix to financially invest in markets (like the UK and the US) with more immediate returns. In the long-term, should Brazil's internet infrastructure continue to grow, Netflix's initial investment may ensure that the country's burgeoning IDTV practices become interlinked with the streamer. Its established business relationships, and even the notoriety it gained in national newspapers over *The Mechanism*, will have helped to synonymise internet delivered television with Netflix among the Brazilian populace. Its initial disruptive, if tentative, moves in non-saturated markets have laid the groundwork for Netflix's streaming protocols to become the 'norm' once the industry has fully adapted its innovations.

4.4 Netflix in the United Kingdom

4.4.1 Netflix and the European Union

Comprising 51 countries and a combined population of 514 million, Europe became the third territory in Netflix's international expansion in 2012, after South America and Canada (Netflix 2017). In Europe, the Audio-visual Media Services Directive (AVMS Directive) provides the regulatory framework for all audio-visual content providers working inside the European Union (EU) (Bondebjerg, Novrup Redvall, Helles, Sophus Lai, Søndergaard, and Astrupgaard, 2017, 60). The AVMS Directive had provisions for OTT services as early as 2010, but such provisions were based on the older dynamic around linear (push) media, which was widely and readily available to the populace, and non-linear (pull) media which was less accessible and popular (Bondebjerg 2017, 61). In the years since, OTT services have expanded rapidly, and the permeation of Netflix and its competitors have helped to expand the terms of non-linear content substantially, requiring change to the existing rules. In November of 2018, the European Parliament updated the AVSM Directory with several new rulings that target on-demand platforms specifically. The first requires all online streaming services operating in European Union countries to adopt a 30 per cent quota of European-originated content in their catalogues (*European Parliament* 2018). If SVODs do not fulfil this quota through the purchasing of licensing rights for European-made content, they will be required to contribute to national film and television funds, as well as investing in local co-productions (Roxborough 2018). The quota is a blanket ruling applicable to all SVODs operating in any European territory, marking a departure from the formerly vague wording of "where practicable", which gave member states room for interpretation, and consequently, inaction (Bondjeberg 2017, 62). Not only does the updated AVSM Directive require EU Member States to make sure that SVODs operating in their jurisdiction have "at least a 30% share of European works in their catalogues" but also to "ensure prominence of these works" (Directive EU 2018/1808, 13.1). While not a confirmed response to Netflix's popularisation of data-lead search optimization and individualised recommendation systems, the update suggests that the legislative body of the EU understands the importance of these IDTV features and the IDTV interface in the success and promotion of content, including content on the SVOD/IDTV services of European B/C/S networks and other subscription services like Amazon Prime.

Although Netflix is rumoured to be in the European Parliament's good graces because of the $1.75 billion it has spent on European co-productions since 2014, CEO Hastings responded to the law with disgruntled resignation (LePrince 2018). In Netflix's October 2018 shareholder letter, Hastings wrote that "quotas, regardless of market size, can negatively impact both the customer experience and creativity", while asserting that Netflix would continue to focus on regional co-productions as part of a customer satisfaction strategy, "rather than satisfying quotas" (*Shareholder Letter* 2018). To that end, Netflix pledged to increase its European commissioning budget to $1 billion in 2019 in recognition of its growing subscriber base (LePrince 2018). While the ruling creates a blanket standard across the EU – with flexibility for countries to update their laws through to 2020 – many countries have pre-existing legislation that protects their locally-made content from being culturally and economically undermined by international companies, as well as EU content obligations placed on national and regional public networks which commission a large majority of local (particularly high-end drama) content. Accordingly, the European Parliament's mandate reflects its awareness of the legislative shortcomings towards IDTV regulation and presents the incentive necessary for EU nations to update their laws and protections.

Netflix experienced push-back against the AVMS Directive's encouragement in Germany when it attempted to challenge a law that obligated all streaming services operating in the country to contribute 2.5 percent of their German revenue towards the German Federal Film Board (GFFB) which funds local content (Roxborough 2018). Netflix took a two-pronged approach, arguing that it was being unfairly affected by the law because of its popularity, and that it should be exempt from GFFB contributions because its German service operates out of Amsterdam (*Hollywood Reporter* 2018). The case has been dismissed by the European Court and, if also rejected by the German courts, Netflix will need to pay a portion of its German profits from 2014 onwards but will henceforth be entitled to apply for GFFB subsidies for any German-based original productions.

These examples demonstrate the ongoing challenges faced by Netflix in a globalised and converging environment, despite this environment providing the viewership, circulation, and delivery speeds that enable it to operate internationally. While the AVMS Directive offers what it views as solutions to the problem of inequitable policing between existing networks and newer IDTVPs, universal mandates around quotas have not been met with universal acceptance. During the consultation process, “some member states did not want quotas for on-demand services, whereas other member states found the quotas to be too low”, leading to a compromise of 30 percent (Blondjeberg 2017). The quota is a potential deterrent for prospective IDTVPs without the resources to enter the EU, which may help to consolidate the position of Netflix, Amazon, and other existing streamers. The entry of Netflix and its contemporaries necessitates answers to new questions around existing practices in areas with regional and national policies concerning windowing, cultural protectionism, and partnership. In addition, Netflix’s role as an international content creator raises both conundrums and opportunities with regards to policing and improving internet infrastructures and on-demand platforms.

4.4.2 A Comfortable Entry into a Mature Market

Netflix entered the British market in January of 2012 (Barnett 2012). It came well-prepared, having already secured deals with the BBC for television content and Lionsgate, Miramax, and MGM for film content (Sweney 2012). At the time of its entry, its direct competition was LoveFilm, a British DVD-mail and VOD service that was fully acquired by Amazon in 2011. In anticipation of Netflix’s arrival, LoveFilm had negotiated its own licensing deals with ITV and Sony in a move that *The Guardian* termed a “TV rights battle” (Sweney 2012). The battle would prove to be one-sided, as LoveFilm would remain second tier to Netflix and was eventually subsumed into the Amazon Prime service, effectively ceasing to exist. Importantly, both LoveFilm and Netflix had concurrent deals with the BBC, emphasizing the British market’s openness to partnership possibilities with IDTVPs. By August 2014, a Broadcasters Audience Research Board survey estimated that Netflix had entered 3 million British homes (Williams 2014). By 2016, that number had risen to 5 million, and the IDTVP had a "stickiness"[1] rating of 16 percent, putting it on par with ITV (also 16 percent) and Channel 4 (12 percent) (*Verto Analytics* 2016). By 2018, Netflix had reached 8.5 million UK subscribers, with an Ofcom report citing "original content" as the main incentive for 38 percent of Netflix's UK subscribers in 2018, which is an 8 percent increase from 2017 (*Ofcom* 2018, 4). The report provided other salient insights that reflected the escalating integration of SVODs in both the televisual landscape and the viewing habits of Britons. Broadcast television viewing made up 71 percent of all audio-visual daily viewing but over half of its audience were people in the '54 and over' demographic (*Ofcom*, 2018, 5). 2018 was the first year in which subscriptions to SVODs (primarily Netflix, Amazon, and NOW TV) rivalled and then exceeded subscriptions to pay TV services, with the former totalling a combined 15.4 million and the latter equalling 15.1 million (*Ofcom*, 2018, 4). Additionally, the report found that "average viewing figures for broadcaster video-on-demand (BVOD) services like iPlayer and ITV Hub are half those for SVOD" including Netflix and Prime Video (*Ofcom*, 2018, 21).

SVODs also experienced a 35 percent increase in revenues, receiving a combined £895 million in 2018, while commercial public service broadcast channels saw a 9 percent decrease in advertising revenue (*Ofcom,* 2018, 4). These numbers followed a decline in public service broadcaster funding for UK-made content – largely morning and children's programming – which is being offset by third party funding through co-productions agreements, tax credits, and deficit funding with production houses (*Ofcom,* 2018, 6). Netflix is currently the most popular streaming service in the UK, with Amazon Prime in second place, though over half of the respondents surveyed said that their main incentive for a Prime subscription was to obtain the free shipping that subscribers of the Prime service receive (*Ofcom*, 2018, 15). The results demonstrated that Britons are adapting IDTVPs into their existing packages, with 71 percent of people holding subscriptions to both SVODs and pay-TV services (*Ofcom,* 2018, 16). Netflix and Amazon are similarly adapting selected broadcast strategies into their repertoire of offerings. In an attempt to remedy one of IDTV's biggest drawbacks – the lack of live events – Amazon acquired the rights to livestream twenty British Premier League football matches per season on its Prime service in

[1] "Stickiness" is a calculation that measures the daily users of a service against its monthly users (subscribers?) to assess the service's average level of regular engagement. (source?).

a three-year deal with the Premiere League (*BBC* 2018). The deal, worth a rumoured £100 million, had the dual effect of bolstering Amazon Prime's live sports content and breaking a "Sky and BT stranglehold" on Premiere League broadcast rights shortly after rumours emerged that Sky and Netflix were in talks for what would become their surprising partnership, which is discussed in more detail later in this section (Sweney 2018).

4.4.3 British Broadcasters Collaborate to Combat Netflix

In June of 2018, British broadcasters ITV, BBC, and Channel 4 announced their plan to collaboratively invest £125 million into Freeview, the UK's leading free television service, over a five-year period (Garrahan 2018). The decision was possibly encouraged by the continuing success of BBC's iPlayer, which in 2017, had enjoyed its (then) most successful year to date, receiving an average of 272 million streaming requests per month, a record beaten in 2020 when iPlayer ended the year with 5.3 billion total annual requests (Kanter 2020). Freeview's £125 million is going towards technological enhancements for the service, primarily the development and maintenance of a phone app and set top box (both titled Freeview Play) that would allow members free access to programmes from each of the broadcasters. ITV Chief executive Alex Mahon justified the decision by saying, "When competitors like Netflix are spending $8 billion a year on content and $1 billion a year on engineering, we need to think about what is good for the consumer and the creative industries" (quoted in Garrahan 2018). While Freeview Play has over 7 million users in the UK, the collective nature of its creation resulted in discrepancies between device playback, content playback, and content availability, depending on the originating network of the selected content and the kind of hardware streaming said content (St. Leger 2020). Examples include programming, selected on Freeview Play, launching from the originating network's own catch-up service, creating differences in user experiences from programme to programme, and Freeview Play's collated programme menu format, which more obviously revealed the absence of content that is available on the linear broadcast schedule but not on Freeview Play (St. Leger 2020). Freeview Play was intended to provide a cohesive user experience that hid the variances in the presentation of content from different networks. Instead, the mixture of platforms unintentionally highlighted the dissimilarities, undermining its stated goal.

Freeview Play represents one in a series of steps by British broadcasters to future-proof themselves against the threat of Facebook, Amazon, Apple, Netflix, and Google (the American-owned internet companies nicknamed “the FAANGs” by media outlets) through mutually beneficial collaboration (Fletcher 2018). These future-proofing measures have seen broadcasters adopting successful IDTV strategies for their own on-demand services, expanding their digital platforms from purely catch-up services to offering back-catalogues of older programmes and acquired content. For example, Channel 4 bought the rights to the 1990s teen hit *Dawson’s Creek* before making all of the show’s six seasons available on its on-demand platform, All 4 (*Ofcom*, 2018, 10). The BBC modified this strategy when it released the entire second season of its much-anticipated series *Top Of The Lake: China Girl* on BBC iPlayer after the first episode debuted on BBC2 (*Ofcom*, 2018, 10). Offering immediate access to entire seasons of no-longer-broadcast programmes and simultaneously broadcasting and streaming episodes of currently-on-air programmes are IDTV tactics that were popularised by Netflix. Its impact in first enabling these features and then normalising them so widely reflects the company’s disruptive effect within the purview of established public broadcasters.

Furthermore, such tactics exhibit British broadcasters’ recognition of changing viewer preferences. Their decision-making is catering to these preferences, which reflects broadcasters’ acknowledgement of IDTV’s permanency in the television industry. At other times, existing B/C/S networks have had to forge partnerships with the incoming competition. This was the case for BBC2 who, in 2017, allowed Netflix to buy the rights to stream the first and second seasons of its period drama *Peaky Blinders* while it broadcast the fourth season on its channel and made seasons 1-3 available on BBC iPlayer. By the end of 2017, *Peaky Blinders* was the most streamed programme on iPlayer and the twelfth most streamed on Netflix (Ofcom, 2018, 28). These statistics also made it the only British public service broadcast content in Netflix's top 20 list, though it would rise to 5th place in 2018 after Netflix began streaming season 3 (Ofcom, 2018, 28).

In 2019, Netflix's regulatory influence was acknowledged by Britain's Culture Secretary, Jeremy Wright, who noted the need for new SVOD-specific regulation that would be compatible with the UK's existing laws. Wright referenced Netflix by name as an "established part of our media landscape" and that Britain "must also make sure that our concept of broadcasting, and our policies towards it, recognize and reflect the growing impact of the digital world" (quoted in Szalai 2019). Wright told industry leaders at the Media & Telecoms 2019 & Beyond conference to "remember that Netflix updates its app weekly, with no hold-up and no regulatory approval. We know from our [streaming catch-up service] iPlayer research: audiences expect us to evolve at the same speed" (quoted in Szalai 2019).

Because of its well-laid groundwork of digital innovation, the relationship between Netflix and broadcasters in the UK is simultaneously mutually beneficial and mutually competitive, but not co-dependent. Netflix has had strong growth in the UK for various reasons, almost none of which challenge the long-standing appeal of British broadcast television. It is for this reason that the company's impact in the UK remains a good barometer for how well-integrated IDTV norms will be in markets with entrenched socio-economic mandates for public service broadcasters, local content, and cultural protectionism, around which longstanding infrastructure has been built, such as public funding and legislation.

4.4.4 Financing and Production

In May 2018, Enders Analysis released a report in which they interviewed the "biggest hitters in the UK television production sector" to gain an idea of the most pressing issues in the industry (2018). The most recurring subject was that of the new players – Netflix, Amazon, Apple – and how to establish and navigate relationships with them (*Enders*

Analysis 2018). The consensus was that Netflix, as the largest of the new buyers, had budgetary advantages, an impressive international scale, and an abnormally fast commissioning process. Netflix senior buyers read prospective scripts in mere days and have a decision within one to two weeks, versus British broadcasters, who take a customary three to six-month window in which to consider the spec scripts and assess a project's viability (Southern 2018). In a broadcasting context, 'viability' could mean anything from a programme's stylistic qualities, to how well it fits into a schedule thematically, to its projected timeslot, and its propensity to challenge or educate the viewing public. Because British broadcasters have commercial and cultural directives, they require a collaborative relationship with producers which allows them to communicate suggestions through methods such as script notes.

With regards to television fiction, Jason Mitchell, the creative director at Connected Set, a British production house, explains that "working up ideas together is important in keeping the UK channels engaged… they feel the need to be shaping ideas with you" (quoted in Southern 2018). This back-and-forth delays the production process but gives broadcasters the greatest possible chance at a successful programme. An estimated 80 percent of all work done by UK production houses is for national broadcasters, who have the benefit of longstanding working relationships and connections (Southern 2018). Because of the established history, and clearly defined channel identities, production companies know what to expect and what kinds of programmes each broadcaster wants. A creative director for Keshet UK, a production company, described the difficulties of creating scripted dramas for Netflix:

> The issue we have is trying to define what is a Netflix show. It's like hitting a moving target. The criticism we've had is it's not 'noisy' enough. 'Noisy' is a word we hear a lot. They want British shows that will travel. They use the word 'glocalised' (quoted in Southern 2018)

From an economic perspective, glocalisation refers to "the tailoring and advertising of goods and services on a global or near-global basis to increasingly differentiated local and particular markets" (Robertson, 2012, 194). Netflix is not a global company, but it infers 'glocalisation' in its commissioning and promotional narratives, and this tactic is a point of contention for British production companies. With co-production emerging as the most sustainable form of long-term funding, production houses are likely facing more collaboration with national channels. They require Netflix's budget to commission competitive high-end drama and Netflix requires access to working relationships and to cultural specificity. Forced into a middle-man role, production companies are tasked with conceptualising programmes that have enough local relevance to satisfy their broadcast partners without alienating the international audiences Netflix wants to attract.

Co-productions between local broadcasters, local production companies, and Netflix bring their own complications. Production houses are heavily reliant on broadcasters, giving the latter group a high degree of creative control when dealing with the former. This power dynamic may change if the financial contributions of broadcasters do not match Netflix's hefty commissioning and production budgets. Accepting co-production deals requires adjustments to each partner's expectations. Such compromises exhibit the new opportunities and challenges of Netflix's entry into national markets and how IDTV norms are changing the goals and processes of television creation.

Netflix's co-productions with British broadcasters have had unexpected impacts. In March of 2017, Barclays Bank announced the creation of a 100-million-pound fund for British production companies making content for SVOD services. The fund was a direct response to the staggered payments that Netflix – and other streaming companies – provide to offset the enormous regular outgoing expenses that come with a monthly subscription income scheme (Williams 2017). As discussed in Chapter Three, Netflix uses a cost-plus model of financing. It generally pays between 125-130 percent of a programme's production costs upfront and this premium allows Netflix to ask for international streaming rights and intellectual property rights at the time of commissioning (Southern 2018). However, as Netflix prefers to greenlight well-developed projects, production houses will already have to have spent anywhere in the vicinity of £10,000 to get a non-scripted show ready for an initial pitch meeting, with an exponentially more expensive price tag for scripted and drama shows (Southern 2018). Netflix's increasingly prevalent financing contrasts the “conventional TV production loans” that are “repaid as the content is delivered, with the broadcaster paying the production company and funder simultaneously” (*Barclays.com).* The difference in payment structures make it difficult for smaller to mid-sized production houses to secure loans, but Barclay’s reorganised loan structure has already allowed companies like Roughcut to borrow from the fund by selling the bank its receivables from a multi-year streaming contract with Netflix for its show *Cuckoo* (Williams 2017, Huddleston Jnr 2017). Among the fund beneficiaries were British companies Drama Republic and Lime Pictures, with the former creating the Netflix/BBC co-production *Black Earth Rising*, and the latter making the Netflix children’s show *Free Rein* (Drama Republic 2018, Lime Pictures 2017).

Eighteen months after the initial announcement, Barclays revealed that it would be doubling this fund, bringing the total pool to 200 million pounds sterling (Barraclough 2018). Loan amounts vary, but once commission has been paid by an SVOD and pre-production has begun, Barclays’ loan range is generally between £1-25 million (Ravindran 2018). Though amounts are not typically disclosed, *Black Earth Rising* received a confirmed £17.5 million, partly due to the expenses of filming in Ghana (Ravindran 2018). As of December 2018, Barclays has only funded Netflix-related projects, but its head of media Lorraine Ruckstuhl has stated that the bank is having “larger discussions” with Amazon, Hulu, and Apple (quoted in Barraclough 2018). Netflix’s role as a disrupter is evidenced through Barclay’s decision and its direct referencing of the streamer. Netflix has helped to instigate new kinds of loan structures that represent the ripple effect of IDTV norms over the financial industry because independent financiers like Barclays are making adaptations to suit Netflix’s staggered pay strategy. Barclays recognised the growth opportunity provided by subscription based IDTV and sought to protect, encourage, and profit from British production companies by serving as a financial intermediary between them and IDTV purveyors. Netflix’s success has prompted the opportunity for financial gain for smaller production companies and banks willing to set up similar schemes.

4.4.5 *The Crown*

Netflix cultivated a relationship with British playwright and screenwriter Peter Morgan, which resulted in the creation of the critically acclaimed drama serial *The Crown*. Released in 2016, *The Crown* presents a fictionalised account of Queen Elizabeth II's reign from 1947 onwards and the impact of Britain's social and political issues on the Queen, as well as other members of the British Royal family. As of 2020, three seasons of the programme have been completed and released, with Ted Sarandos confirming that Netflix's vision for the series is a total of six seasons, chronicling Elizabeth II's life "over six decades" (O'Connell 2016). Morgan, who holds a CBE for services to drama, had an established track record of writing well-received media on the subject of Queen Elizabeth II. He wrote the screenplay for the 2006 film *The Queen*, which won numerous accolades, including a BAFTA award for best film, a Golden Globe award for best screenplay, and an Oscar nomination for best original screenplay. Morgan followed his success with 'The Audience', a 2013 West End (and later Broadway) play depicting the weekly meetings between Elizabeth II and successive British Prime Ministers. *The Audience* was produced by Andy Harries, CEO of British production company Left Bank, in which Sony Pictures Television also has a stake. Left Bank was quick to ingratiate itself with British broadcasters. Based on the strength of its BBC One crime drama *Wallander*, it became the first production company to receive an investment (of £1 million, or a 24.9 percent share) from BBC Worldwide, and developed relationships with ITV over its production of their crime drama *DCI Banks* (Rushton 2012).

When Morgan decided to create a show based on 'The Audience', Harries and Left Bank pitched it to BBC and ITV, among others, with Harries "expecting [to] have to set up a US-UK coproduction to make the show" (quoted in Franks 2016). Harries shopped the project to the BBC, ITV, and Sky, but all three declined to move forward (Dowell 2017). Harries speculated that the "sensitivities of the scripts" pertaining to the programme's proposed later seasons, which follow Thatcherism in 1980s UK and the marriage between Prince Charles and Princess Diana, would have been compromised because of the "closeness of the BBC and the Palace" (quoted in Dowell 2017).

After these rejections, and upon meeting with Netflix to pitch the serial drama, the IDTVP "made [Harries] an offer we couldn't refuse" (quoted in Franks 2016). In addition to the financial incentive of Netflix offering to commission and solely invest in a two-season order, Harries cited the streamer's international reach and hands-off approach to production as positives. As Harries explains: "We were lucky because our ambitions tied in with their global ambitions. Little did we know, but they were looking for a global show to roll out around the world. They don't directly interfere, so working with them has been a huge pleasure" (quoted in Franks 2016). Morgan is credited as the sole writer for all the episodes of the first season, and eight of the ten in the second. *The Crown* is Netflix's most expensive programme to date. Its first two seasons reportedly had a combined budget of $130 million (£94 million), which averages out to between $6-13 million per one-hour episode and $390 million (£292 million) for the entire series (Seales 2017).

The partnership between Morgan, Left Bank, and Netflix has yielded the IDTVP its most acclaimed programme yet. Over its two current seasons, *The Crown* has won five BAFTA and BAFTA Television Craft awards, eight Primetime Emmy awards, and two Golden Globe awards, one of which was best television drama. Furthermore, the high-end serial has become a flagship Netflix original outside of the United Kingdom, partly due to its serious yet voyeuristic look into an internationally known monarchy whose private lives, while closely guarded, have been highly speculated about for decades (Hughes 2019). Harries' speculation that *The Crown* would prove too controversial for local networks was proven somewhat correct in 2020, when British Culture Secretary Oliver Dowden called on Netflix to provide a disclaimer that reminds viewers that the programme is a work of fiction (Kanter 2020). Despite support for Dowden's remarks by British Culture Minister John Whittingdale, Netflix has rejected the request, responding that it has "every confidence our members understand it's a work of fiction that's broadly based on historical events" (Netflix quoted in Kanter 2020).

4.4.6 Netflix and Sky

In November of 2018, the results of a “pioneering partnership” between Netflix and Sky went live (*Netflix Media Centre* 2018). Eight months prior, Sky and Netflix announced that they had reached an agreement that would allow Sky subscribers access to both Sky-acquired content and Netflix content on the same interface (Archer 2018). A Netflix membership is bundled into two premium Sky subscriptions – Sky Q and Sky Ultimate On Demand (Sky UOD) – but customers have the added convenience of Netflix content being searchable, streamable, and actively featured directly on the Sky homepage, alongside existing Sky programming, without the need to open the Netflix application separately (Archer 2018). Sky’s Netflix bundle launched in the UK and Ireland in November, with the service becoming available to customers in Italy, Austria, and Germany in 2019.

The Sky-Netflix partnership is an improved version of the deal Netflix made with Virgin Media in 2013, which incorporated the Netflix application into its TiVo device, making Netflix available to its then-1.7 million British users (Wallenstein 2013). The currently ongoing partnership proved popular, with over 700 million hours of Netflix content streamed since 2013 and 100 million hours streamed in 2018 alone (*Virgin Media* 2018). After almost five years of separate billing, Virgin Media “strengthened its longstanding partnership with Netflix” by allowing customers to add their Netflix subscription to their monthly Virgin Media bill (*Virgin Media* 2018). Netflix’s arrangements with Virgin Media and Sky have similar rewards for each partner. Netflix was able to broaden its influence in the UK market and access a Pay-TV demographic that IDTVPs have statistically struggled to reach. Virgin Media benefited from its foresight, recognising the value of establishing the first major partnership with Netflix in the UK. The addition of Netflix as content creator and IDTV portal added value to Virgin’s TiVo service, which, as a content aggregator, relies on its ability to provide centralised access to its customers’ existing subscriptions. As Netflix’s popularity grew (mirroring the growth of other OTT and IDTV businesses) Virgin Media recognised that an increasing number of consumers would expect access to more SVOD services and partnering with Netflix allowed it to reduce subscriber churn-over rate (as TiVo had transitioned from a single-purchase operation to a monthly subscription operation) and incentivise new customers with existing IDTV/SVOD memberships.

Sky's cost-benefit considerations were somewhat different. It announced the Netflix deal just six months before American conglomerate Comcast became its majority shareholder, after a contentious and closely followed bidding war with fellow American behemoth Disney. Disney, whose subsidiary Fox owned a 39 percent stake of Sky – which it has since sold to Comcast – lost to Comcast's bid of $39 billion (Jackson 2018). Sky has obvious appeal to Comcast, whose only television assets were NBC Universal and its advertiser-funded entertainment and news channels. As a pan-European network, Sky provides a strong foothold into the region and brings an existing customer base of 27 million (*BBC* 2108). After the deal was formalised, it was estimated that Comcast's subscriber numbers would surge from 30 million to 53 million and its international influence would climb from 8 percent to 25 percent (Bhat 2018). In addition to providing access to a high number of satellite and local channels, Sky has a lucrative deal with American premium cable network HBO to exclusively stream some of its most popular shows (*Game of Thrones* and *Westworld*) as well as a $250 million pact to co-produce high-end drama series (*Sky Group* 2018).

Sky may be a profitable acquisition for Comcast, but its relationship with Netflix was possibly an attempt to mitigate its at-home competition. Sky's decrease in subscriber numbers (which fell 6 percent between 2014 and 2018) and desire to future-proof itself was likely a motivator in the Netflix partnership (Reynolds 2018, LePrince-Ringuet 2018). In the UK, over 50 percent of people between the ages of 16-24 have a Netflix subscription, with the number decreasing to 40 percent for the 25-34 category (Reynolds 2018). Considering the financial importance of capturing the next generations of viewers, a partnership with Netflix offers a short-term resolution to this ever-expanding problem. As media conglomerates use their wealth to consolidate their power on a macro level, the companies they purchase have already had to forge relationships with other competitors. Sky's partnership with Netflix is another example of the way in which Netflix's strategy of resilience and adaptability allowed it to create opportunities for itself where none previously existed, thus ingraining itself into a market with a well-established television ecosystem.

4.5 Netflix in India

4.5.1 An Entry into Asia

Netflix's success in the Asian market has been highly varied, much like the region itself. As the "largest and most diverse continent" on earth, Asia includes 48 countries and has a total population of over four billion people (Spencer 2020). From Netflix's perspective, Europe's bureaucratic complications are offset by its reliable and wide-ranging digital infrastructure. South America's lack of internet penetration is counterbalanced by the high demand for Spanish and Portuguese-language content. Asia compounds the problems that awaited Netflix in both of those continents because of its cultural, financial, and infrastructural diversity, explaining why it took the company until 2016 (four years after its European entry and five after South America) to go into the region. In 2016, Netflix opened for business in South Korea, Hong Kong, Taiwan, and Singapore. According to Hastings, "these four markets well represent... the combination of increasing internet speeds and ubiquity of connected devices [that] provide consumers with the anytime, anywhere ability to enjoy their favourite TV shows and movies on the Netflix service" (Netflix Media Centre, 2015). At the time, Hong Kong alone had an estimated mobile phone penetration of 230 percent, which reflected its heavily digitally-acclimatised population (O'Neill 2015). As the prototypical IDTVP, the steps Netflix has taken to circumvent the infrastructural and cultural limitations of full penetration demonstrate its multi-faceted approach. In emerging markets with economically disadvantaged populations, Netflix has begun to find new ways to make its service appealing within a low-wage, limited-bandwidth context, and to attract and retain new demographics.

Each Asian country's disparate local tastes regarding film and television and their unequal internet infrastructures required changes to Netflix's primary toolkit of personalisation, variety, and convenience. The Asian countries Netflix chose to enter first were the ones whose technological and financial conditions were receptive to the initial toolkit. Netflix's first Asian service was Japan (*Netflix Media Centre* 2015). Ninety One percent of Japan's population has access to the internet (*Japan Time*s 2016). According to a Nielsen survey taken just one year before Netflix launched in Japan, ten million households were already streaming SVOD content, with that number projected to rise to twenty million in 2020 (Jarnes 2016). The downside of starting in an already burgeoning market was that Netflix faced existing competition from networks who had the benefit of regional relationships, local knowledge, or wealth. Avex was Japan's only domestic streaming service but had amassed 5.5 million subscribers amidst the country's 52 million households (Jarnes 2016). Hulu launched in 2011 and, after several lacklustre years, was sold to Nippon TV, one of Japan's largest broadcasters (Jarnes 2016). Amazon Prime went head-to-head with Netflix, with both services debuting in Japan during the same month (Jarnes 2016). Netflix entered the country prepared, with three original shows, two of them co-produced with Fuji Television, a major Japanese broadcast network (Jarnes 2016). As the leading digital technology manufacturer in Asia – and globally – Japan was well equipped to facilitate Netflix's high-speed, high-resolution internet needs. Additionally, its dominance over the manufacturing of consumer electrical goods, particularly smart phones, laptop tops, and televisions, meant that Netflix had direct access to these manufacturers. This proximity has resulted in partnerships, such as a May 2018 deal with KDDI, a Japanese cell phone carrier, to bundle a Netflix subscription with one of their smartphone packages (Ji Ji 2018). Despite competition, Netflix Japan closed 2018 with the largest catalogue of titles out of any Netflix service in the world, eclipsing even the United States. Its trajectory in the country demonstrates the IDTVP's competence at gaining footholds within heavily technology-connected markets. In Japan's case, Netflix legitimised itself with customers by partnering with major national networks and technology manufacturers as a way of familiarising subscribers with the 'Netflix experience' before the company had fully Netflix-originated Japanese programmes (Heisler 2018).

4.5.2 A Stunted Start in the Indian Market

Netflix launched its platform in India in January 2016. India's market is diverse linguistically and economically, with disparate levels of income, infrastructural development, and internet access. In 2020, the International Monetary Fund ranked India as the fifth largest global economy and the country is projected to have over 650 million internet-connected smartphone users (of a population of over one billion) by 2022 (Myers 2020).

As of 2020, India has the second largest smartphone media market in the world after China, whose tight regulations make its digital ecosystem highly impenetrable and effectively closed (Jain 2020). The smartphone/smart device market is an important one in countries with large wealth divides and still-developing internet delivery system infrastructures. In India, the unavailability of home-internet in many densely populated rural areas and the high costs of televisions and computers mean that most personal video consumption occurs on a smartphone screen, with around 79 percent of all internet browsing happening through a smartphone (Bhattacharya 2017). Though video streaming is available, the quality of the video file, the internet download speed, and data caps severely impact accessibility to a service such as Netflix. The streaming giant ordinarily requires a minimum speed of 500 kilobytes per second (kbps) against a recommended speed of 1500kbps but has compensated for the gap between its best quality and India's lack of fast internet connectivity by optimizing its video specifically for the region and creating smaller video files that are able to be streamed over a speed of just 200kbps (Sarkar 2017).

Netflix's plans in India start at 500 rupees a month (USD$7.34), pricing them far out of budget for a population with a mean annual income of USD$1670 (Choudhary 2018). Netflix recognised the enormous amount of existing local content produced by both public and private Indian networks that cater to the country's immense diversity of language, dialects, and culture, and opted instead to "target mostly the high-end 10 or 20 million for whom our pricing is not a problem" (Hastings, 2017). To that end, Netflix has been slow to develop India-specific content. The streamer has publicly said it has plans for seven Indian original programmes that cater to several of India's multilingual viewers who speak any of the country's twenty-two official languages. However, the diversity of the country's populations, in wealth and across culture, class, and taste, make this task difficult. Netflix's interest in entering the growing Indian market is shared by its primary direct competitor, Amazon. While Netflix's India-specific offerings have been sparse, Amazon has over 18 Indian original programmes in development and has secured deals with around 25 local production houses and creators (Babones 2018). Furthermore, an Amazon Video annual membership is only

USD$15 with an Amazon Prime account, making the option far more cost-effective for a population who is already accustomed to the Amazon brand (*Forbe*s 2018).

4.5.3 Competition From Conglomerates

Before Netflix entered the country, India already had several streaming platforms available. The largest local provider is Hotstar which debuted a year before Netflix, in February 2015. Hotstar differs from Netflix and Amazon in that it is the streaming platform of Star India, a subsidiary of 21st Century Fox. Like other local on-demand services, Hotstar's film selection is limited, but it hosts most of the content across Star India's 37 channels (Baxi 2017). This content includes the exclusive streaming rights to HBO's current and upcoming programming, including *Game of Thrones*, *Westworld*, and *True Detective*, through Star India's deal with HBO's parent company, Time Warner (Nyay 2015). Between 2016 and 2017, Star India invested USD$192 million into its digital arm, with an additional USD$2.88 billion going towards the winning bid on the exclusive rights to stream the Indian Premiere League live on Hotstar until the end of 2020, giving it a monopoly on the most widely-viewed sport in the country (Baxi 2017). Additionally, Hotstar has a "freemium" system which provides free access to most of the platform's media without an account, though subscription to the service will give users access to all content for USD$2.91 a month (Baxi 2017). Coupled with its extensive library of varied content (in multiple Indian languages) and control over access to the country's favourite live-event, Hotstar's freemium pricing system has given it an enormous competitive advantage over Netflix with regards to viewership. Hotstar's gains may increase thanks to Disney, which owns Star India as part of its 2019 acquisition of 21st Century Fox. In April of 2020, Disney + officially launched in India as 'Disney + Hotstar', a combination of the Disney + and Hotstar portals that offers the content of both providers on the same platform, including Hotstar's lucrative live cricket matches (Adlakha 2020). Although all content is available on Disney + Hotstar, access to the entirety of the catalogue is reserved for subscribers who pay for VIP (USD5.50 per annum) and Premium memberships (USD$20.50 per annum) (*The Indian Express 2020*). The VIP plan allows viewers to watch Disney + content in multiple Indian languages (as opposed to a limited selection of regional languages) while the Premium plan provides access to Disney + original television programmes (*The Indian Express* 2020). The integration of the two services into one app granted Disney + gained access to Hotstar's 8 million existing paying subscribers when it launched, with the combined total Disney + Hotstar subscriber number swelling to over 26 million by December 2020, a number which Disney's Chairperson of International Operations Rebecca Campbell said amounted to 30 percent of the company's total international subscriber base (SN 2020). Disney +'s pre-prepared path into the Indian market by way of Hotstar is the effect of increased media conglomeration of global mass media corporations and is evidence of the consequences of IDTV's normalisation. Disney +'s monetisation of its Indian catalogue's local language dubbing reflects IDTVP's increasing use of post-production localisation tools to localise existing (primarily English-language) content, especially when new original local-language programming is not immediately available on the platform.

Despite competition from Disney + Hostar, India's huge consumer base gives Netflix potential access to hundreds of millions of new subscribers and the increasing expansion of internet availability, faster 4G internet speeds, and cheaper digital devices make it likely that larger segments of Indian society will have access to Netflix in the future. In the long term, Netflix's prospects for India look promising, but in the short term, these technological and infrastructural hindrances have necessitated a niche approach to the region. Hastings remains unperturbed, telling the *Times of India* that "Data cost can be an issue today, but in three to five years, it will be inconsequential" (quoted in Sarkar 2017).

4.5.4 Controversy, Critical Acclaim, and *Sacred Games*

Netflix's first Indian original production was released in July 2018. Based on the best-selling novel by Vikram Chandra, *Sacred Games* is an 18-episode, two-season, serial mystery drama that was shot entirely in Mumbai and uses a mix of Hindi, Punjabi, and Marathi languages (Choudhary 2018). Upon its release, *Sacred Games* received acclaim from international critics. As of 2019, ninety-two percent of its first season critical reviews have been positive, with praise focusing on its “expansive storytelling” (*The New York Times* 2018) and a script “bristling with lyricism, and an intriguing air of vibrancy and originality” (*Hindustan Times* 2018). However, *Sacred Games* also ignited a political feud between the ruling Hindu nationalist Bharatiya Janata Party (BJP) and the opposition Indian National Congress Party (INC) leader Rahul Ghandi (Joglekar 2018). The feud centred on *Sacred Games*’ depiction of Rahul Ghandi’s father, former Prime Minister Rajiv Ghandi, who also led the INC. Ghandi was featured in archival footage used in the series during a voiceover where the protagonist discusses Ghandi’s role in one of India’s largest corruption scandals, accuses him of pandering to Muslim voters, and later calls him a derogatory word meaning “coward”, which was translated to “pussy” in Netflix’s English subtitles of the programme (Joglekar 2018).

The scenes exacerbated existing political tensions between the Hindu-based BJP and the secular INC, who were preparing for the Indian 2019 election. Eager to protect the reputation of the INC and Ghandi’s political legacy, INC members filed a lawsuit in the Delhi High Court against Netflix for “inappropriate dialogues, political attacks and even speeches, which are derogatory in nature and harms the reputation of the former Prime Minister Rajiv Gandhi (quoted in Joglekar 2018). In retaliation, the BJP accused the INC of “muzzling freedom of expression”, despite the strict censorship imposed on all non-IDTV Indian film and television content by the country’s Ministry of Information and Broadcasting (quoted in Joglekar 2018). The Ministry’s lack of jurisdiction over internet-delivered content was also addressed in the lawsuit, which urged the court to “consider the void in the regulatory framework that governs what Netflix can and cannot show in India” to prevent the IDTVP from commissioning and distributing content that is “against the best interests of the country” (quoted in Joglekar 2018). Netflix’s initial response to the outcry was to replace the subtitled “pussy” with the less offensive “wimp” but clarified that it was a “unilateral” and “internal” decision rather than a reaction to the legal pressure (quoted in Joglekar 2018).

Despite its public commitment to artistic risk-taking, Netflix is cognisant of the regulatory consequences that such risk-taking may bring. In its end-of-year 2018 company report to the United States Securities and Exchange Commission, Netflix admitted that objectionable content in foreign markets was a risk factor:

> To the extent our content is deemed controversial or offensive by government regulators, we may face direct or indirect retaliatory action or behavior, including being required to remove such content from our service, our entire service could be banned and/or become subject to heightened regulatory scrutiny across our business and operations (U.S SEC Report, 2018, 8)

Even with the controversy that Netflix's original programming has garnered in territories such as India and Brazil, the IDTVP is mindful of the impact such outcry could have pertaining to government regulations. As an IDTV provider, Netflix is not subject to the same content restrictions that apply to broadcasters, and its risks as an international operator open it to a variety of national regulatory policies that differ across markets and may change at any time. Shortly after its SEC admission, Netflix joined Fox's Hotstar and Viacom's Voot (an Indian IDTVP with a dual advertiser and subscription funded model) in making the apparent compromise of signing a voluntary "self-regulation code" (Bhushan 2019). The IDTVP said the following about its decision:

> The self-regulation code is a set of guiding principles for participating companies like us. It ensures an environment that protects the artistic vision of content producers so that their work can be seen by their fans. The code also empowers consumers to make viewing choices that are right for them and their families (Netflix statement to the *Hollywood Reporter*, 2019).

The code is believed to be an attempt to appease the Indian Central Board of Film Certification – which also oversees television – and avoid the extension of governmental censorship to IDTV and OTT services (Clark 2019). It is difficult to speculate as to whether Netflix had enough knowledge of India's political history and its current political rivalries to have anticipated that some *Sacred Games*' scenes would cause a level of offence that would provoke a political or legal backlash. What is apparent here is the unpredictability of the challenges that Netflix faces as an international IDTVP. In addition to the difficulties of maintaining the internet infrastructure required to deliver content and make the Netflix portal operational, the company is liable as a creator of original content, and the results of these liabilities may set precedents for other IDTVPs. The necessity for Netflix to ensure swift responses to the ever-present possibilities of moral outrage, legal action, and cultural ignorance – let alone the expertise to avoid these possibilities in the first place – are mammoth.

While Netflix is destined not to be able to anticipate or perfectly fulfil all of these expectations; as demonstrated with the Indian and Brazilian examples, its persistence and strategies have made it unusually resilient. Netflix has been able to adapt in response to external threats and internal failures and this adaptability has been central to the IDTVP's ability to operate in 190 different countries. Much like algorithms, which improve with use, strategies of adaptability also help Netflix to 'future-proof' itself in markets where its use is limited. In laying the groundwork in countries where its subscriber bases are low comparative to their populations, Netflix will likely only gain more traction when infrastructural and technological improvements occur in the coming years.

4.6 Netflix in Sub-Saharan Africa, the Middle East, and North Africa

Netflix entered the African market in January of 2016, launching its service across all 54 African countries simultaneously (Kazeem 2016). Africa is considered an untapped but potentially lucrative market for streaming. A combination of modernized infrastructure and record high levels of foreign direct investment mean that the continent is projected to bring in almost USD$3 billion in streaming revenue alone by 2025, with Netflix forecasted to generate almost thirty percent of that figure (Gruenwedel 2020). Similar to the challenges discussed in the preceding section, Netflix's main barriers to saturation are the continent's lack of internet connectivity infrastructure and the consumer pricing of internet data plans relative to mean income (Kazeem 2016). In 2016, Africa's internet penetration rate of 20 percent is the lowest of any other continent, but this number is not due to a lack of physical internet infrastructure (Vourlias 2016). Across the region, several large-scale improvements have been made to increase the raw capacity for internet transmission, including the connection of undersea cables and above-ground high-speed fibre cables (Bram 2015). The problem lies instead with the lack of global servers on the continent. Most of the media content streamed into Africa is located on servers in other continents; these often thousands of kilometres away (Bram 2015). The distance means that data speeds are both significantly slow and very costly for local African internet service providers to host, resulting in expensive consumer internet plans (Bram 2015).

Netflix's initial response to the issue of slow internet was to announce the development of the same video compression technology which would later prove successful in similarly affected markets like India. The technology enables faster delivery to regions with limited connectivity by caching content onto worldwide servers and directing it to local ISPs (Kazeem 2019). However, at the time of Netflix's January 2016 international rollout, the company had no global servers anywhere in Africa, as demonstrated in the image below:

Fig. 55 This image shows Hastings standing in front of a map displaying the location of Netflix's global servers in 2016 (Kazeem 2016)

Furthermore, smartphone penetration was largely concentrated within just six African countries, with the highest penetration (34 percent) belonging to South Africa and the lowest (8 percent) in Tanzania (Kazeem 2016). Nigeria saw the second-highest rate at 27 percent (Kazeem 2016). Considering these figures, and Nigeria's longstanding and nationally dominant film industry (known as 'Nollywood') it was unsurprising that Netflix chose Nigeria as the location for its first African global server, almost a full year after its entry into the region (Ekwealor 2016). Despite this step, internet speeds continue to lag, with South African users (estimated to be Netflix's most populous base in the continent) experiencing the second-slowest ISP speeds of any of the company's international subscriber base (*Business Insider* 2020).

Netflix has chosen to use two existing geographic designations for its approach to the African market. One is sub-Saharan Africa (SSA) containing 48 countries, and other is the Middle East and North Africa region (MENA) comprising 19 territories (UNDP 2020).

4.6.1 Learning From the Locals: Netflix and Competition in SSA

Netflix was not the first OTT/SVOD in sub-Saharan Africa. When Netflix had begun trailing its technological localisation strategies in the Brazilian and Indian markets, its African competitors had already been implementing a "hyperlocal" approach (Douglas 2017). The two largest – and still operating – services are iROKOtv and Showmax. iROKOtv is a Nigerian subscription SVOD that primarily distributes Nigerian films and currently holds the world's largest catalogue of 'Nollywood' movies (Jewell 2017). Since its launch in 2011, iROKOtv has moved into television and in-house production. It owns one channel on a Nigerian broadcast network and another channel on a Nigerian cable network, as well as a channel on Sky UK (Jewell 2017). iROKOtv also produces its own content, including over 200 feature films and 30 television programmes, most of which are English-language and filmed and set in Nigeria (Jewell 2017).

Showmax is a South African subscription streaming service that launched in 2015. Owned by Naspers, the largest technology and media company in Africa, Showmax delivers content to over 70 markets across Africa and Eastern Europe (Douglas 2017). This geographic distribution is a calculated attempt to target countries it considers underserved by Netflix and which it could therefore apply its “hyperlocalisation” strategy (Douglas 2017). According to Showmax’s Head of Communications Richard Boorman, hyperlocalisation entails “tailor[ing] ShowMax’s offering specifically to each market, beyond simply content”, including considerations such as locally-available payment methods and region-specific data limitations (Douglas 2017).

Showmax’s hyperlocalisation efforts have focused on the Kenyan and South African markets (Doulgas 2017). In South Africa, the company offers a range of payment options, including through prepaid vouchers found at over 500 retailers across the country, as an addition to a mobile phone bill for Vodacom customers, or a landline bill for Telkom customers (these being the two largest telecommunication providers in South Africa), as well as through customer accounts for the Naspers-owned satellite channel, DStv (Douglas 2017). In Kenya, Showmax takes payments through the country’s most popular method of money transfer, M-Pesa, which is used by over 93 percent of Kenyan adults (RFI 2017). Despite being one of the most ‘banked’ countries in Africa, 28 percent of Kenyans do not hold bank accounts, and infrastructural hindrances make online and physical banking cumbersome for those who do (McGath 2018). M-Pesa solves these problems by substituting sim cards and mobile phone accounts (to which over 90 percent of Kenyans have access) for bank account details to allow quick and reliable virtual money transfers, without the need for any internet access whatsoever (McGath 2018).

Furthermore, Showmax’s plans in both countries are priced in their local currencies, unlike Netflix, whose set rates are priced in USD and are therefore subject to changes in international exchange rates (Douglas 2017). Showmax offer two types of plans: Showmax Select and Showmax Premium. ‘Select’ is a mobile-only plan that only offers lower-resolution video, which works well across the African region because of patchy internet connectivity and slow streaming speeds, while 'Premium' gives subscribers access to three levels of resolution (Digital TV 2016). Both plans come with the option to download content that can be viewed offline. Showmax's catalogue is African content, with the company's original commissions coming from South Africa and Kenya (Vourlias 2017). Showmax's African Head Chris Savides explains that "people obviously like Hollywood content, but we know that local content resonates" (quoted in Vourlias 2017).

Both providers were adapting their services to suit the specific needs of the African countries in which they operated before the arrival of Netflix and its own brand of localisation. iROKOtv focused on localising pricing, data access, and circumventing technological limitations. When the company launched, it was free for viewers and supported by advertising. In 2014, iROKOtv moved to a dual-funding model, adding a subscription tier for USD$2.50 per month, which accounted for the region's lack of familiarity with subscription models and the low levels of disposable income for many of its citizens (Thakkar 2015). In 2016, iROKOtv debuted different pricing plans for different countries, offering a yearly subscription of USD$50 per year for (primarily diasporic African) viewers living in the United Kingdom and the United States while raising the price to USD10 a month for Africa-based viewers (Fick 2016). In 2015, iROKOtv announced that it would be moving to a mobile-only service and shutting down its website application (Okwii 2017). The company's CEO and founder, Jason Njoku, attributed the decision to localisation, explaining that 76 percent of traffic came from mobile users (Okwii 2017). Of those users, 90 percent use Android applications because the operating system is found on multiple low-cost smartphones, as opposed to the Apple operating system found on prohibitively expensive iPhones (DigitalTV 2016). The iROKOtv app was designed for Android smartphone users and allows subscribers to download content for offline use, which remains on their mobile devices for thirty days (Jewell 2017).

Fig 56. An iROKOtv kiosk (Lukhanyu 2017)

To further encourage app downloads and lessen the cost of bandwidth for Nigerian subscribers, iROKOtv established over 50 kiosks in the country that provide free internet to the service's subscribers with the expressed purpose of allowing them to download the app and its content without sacrificing any of their personal data plans (Jewell 2017). This tactic demonstrates iROKOtv's recognition that the region's industrial complications undermine the experience and quality of streaming media and challenges Netflix's framing as an innovator of internet infrastructure localisation. The "download first" approach is one of iROKOtv's main attempts to circumvent those difficulties, with Njoku saying that the company "actually hides the fact that you can stream the content" because the lack of reliable high-speed servers meant that subscribers "handed the experience over to the teleco…..when [they] pressed play" (quoted in DigitalTV 2016). "A download takes less than 60 seconds" says Njoku, "and we control the experience" (quoted in DigitalTV 2016). In addition to recognizing the value of the IDTV 'experience', iROKOtv also grasped the value of technical localisation and establishing good working relationships with local producers. The company's office in Lagos have a team dedicated to the manual conversions of film DVDs to digital files and the manual additions of subtitles to content, making up for its lack of the kind of streamlined digital infrastructure that Netflix has with the PP3 Programme by using their in-house staff's manual labour. Because iROKOtv's licensing team also works on-site in the Lagos premises, it has become routine procedure for local producers to make unscheduled visits in order to negotiate deals, with *Variety* reporting that “film producers literally knock on the door of the iROKOtv building to offer their wares for licensing” (Thakkar 2015). On this dynamic, Njoku notes his company’s underlying localisation approach vis a vis OTT/SVOD services, saying “Netflix is building for the world; we are building for Africa” (Njoku quoted in Vourlias 2016). Highlighting the perceived discrepancy between Netflix and iROKOtv, Njoku added that Hastings’ company was “predominantly a place to find American movies”, but for African content, “[iROKOtv] are the specialists” (quoted in Jewell 2017).

iROKOtv’s approach is an earlier iteration of Netflix’s current strategy. iROKOtv understood the importance of knowing the local requirements and limitations of its local market (such as emphasising downloads over streaming) and used technology to bypass industrial restrictions, as was the case with the kiosks. The company adjusted its pricing plans from the beginning based on the economic and technological conditions of the countries in which it operates and focused its attention on the most popular platforms in the African region. These measures were in service of providing a differentiated ‘experience’ that offers the ostensible benefits of consuming streaming content (accessibility, ease, control) and works around the institutional shortcomings of the African market in relation to IDTV. Following in iROKOtv and Showmax’s footsteps, Netflix’s focus in sub-Saharan Africa has been South Africa. Netflix offers three subscription tiers in South Africa; a basic plan which limits users to one-screen viewing and restricts high-definition video, a standard plan, which offers two-screen viewing and high-definition video, and premium plan that offers four-screen viewing and access to ultra-high-definition video (Ramalepe 2020). Although Netflix’s basic pricing plan, at USD$5.76 per month, is the second cheapest of all of Netflix’s international plans (beaten only by Brazil) the amount is relatively high, with a yearly subscription constituting 1.14 percent of an average USD$6040 South African income (Moody 2020). To cater to South Africa’s mobile-centric viewer base, the company introduced a cheaper mobile plan in 2020 which gives users access to the service on their mobile phones at a lower video resolution, and an additional ‘mobile +’ plan which has the option of adding an additional screen (Ramalepe 2020). That same year, Netflix struck a deal with Telkom and Vodacom to allow their customers to add a Netflix subscription to their mobile or fixed phone line accounts, a payment method that had already been in use by Showmax since 2017 (*City Press* 2020).

Netflix is making a public and industrial commitment to commission African-made content and spotlight African creators on its international platform, as demonstrated by its "Made By Africans, Watched By The World" campaign (Chen 2020). The campaign features eighteen African creatives, many of whom are involved with Netflix's African originals, *Queen Sono* and *Blood & Water* (*Glamour* 2020). Each are speaking their native languages and dialects whilst wearing clothing specifically created for the campaign by African fashion designers, including silhouettes and prints which "translate the importance of African creative stories through fashion", as seen in the following image from the campaign shoot (*Glamour* 2020).

Fig. 57 (*CNN* 2020, courtesy of Netflix, *Queen Sono*, and *Blood & Water*)

Africa has been the only territory for which Netflix has created such a regionally specific, globally oriented campaign. This approach allows the company to 'stake a claim' on IDTV in the continent and take credit as a facilitator for, and exporter of, African content, in the wake of growing international discourse about the continuing effects of colonialism in transnational media, a topic discussed in detail in Chapter Five. Despite its vocal pledge to invest in, and commission from, the SSA film and television industry, the existing infrastructural limitations of the region pose ongoing difficulties (Chen 2020). In a 2020 interview, Head of African Original Programming Dorothy Ghettuba said that the main difficulties facing the IDTPV were "power cuts and load shedding and data – those infrastructural challenges are the things that keep us up at night as an organization. And it is a big challenge across many African countries" (quoted in Chen 2020).

4.6.2 The Existing Challenges and Potential Opportunities for Netflix in MENA

Netflix has struggled to secure a foothold in North Africa and the Middle East. While each country in the region has its own infrastructural and socio-economic contexts, MENA countries share common linguistic and religious traditions. The region's most spoken language is Arabic and its majority religion – Islam – heavily informs the cultural and legislative frameworks of most MENA countries (*Pew Research Centre* 2019). The MENA region has the highest level of government restriction over religion than any other region globally, with governments upholding the socially conservative tenets of religion in sectors such as education, legislative bodies, and state-owned media (*Pew Research Centre* 2019). Because of the Middle East's integration of religion and state, mass media, whether publicly or privately owned, is subject to strict conditions aimed at limiting material that is deemed 'harmful' to society or at odds with Islamic teachings (Haymillian 2016). Despite the growing influence of religious conservatism over media products in the MENA region, television remains the second most-consumed medium per capita (Zenith 2018). Free to air, advertiser supported satellite television is most dominant, accounting for almost 80 percent of television households in the region, leaving a wide gap between terrestrial (analogue) television households at 16 percent, and cable television households at a meagre 0.2 percent (Middle East Media 2016). Arabic-language television is dominant, with an average of only one in ten MENA viewers consuming television from the United States, Europe, India, or Turkey, according to a 2016 study conducted by Northwestern University in Qatar, some results of which are seen in the graph below (Dennis, Martin, and Wood 2016).

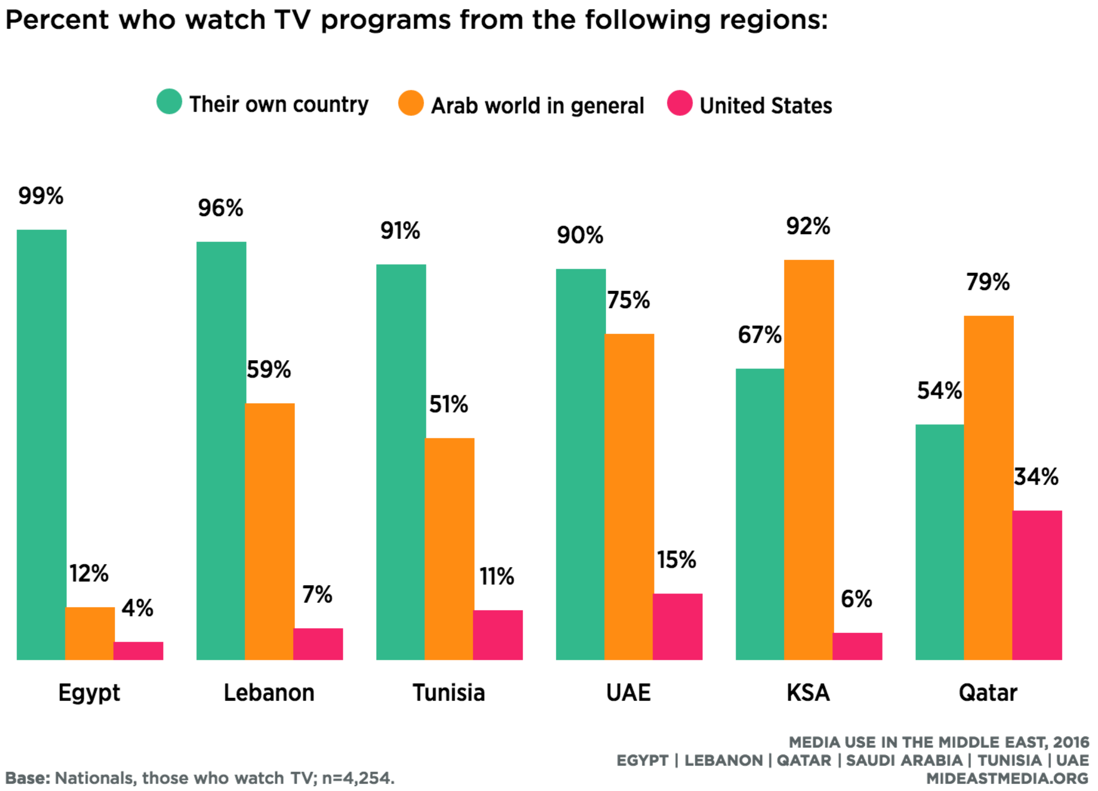

Fig. 58 (Dennis, Martin, and Wood, 2016)

Satellite television's dominance is largely explained by the region's common language, which allows the programmes created in the countries with the most robust television ecosystems – such as Morocco, Jordan, the United Arab Emirates, and Egypt – to travel easily across Arabic-speaking countries and attract high levels of viewership (Middle East Media 2016). The cultural homogeneity of the MENA area's television content is heavily driven by Egypt, whose long-established production sector is responsible for almost 70 percent of the region's programmes, and the lack of reliable and widespread audience measurement systems, leading networks and production houses to make tried and tested commissioning decisions in an effort to retain advertiser backing, which make up 70 percent of television revenue (Oliver Wyman 2013). Scripted drama is the most popular television format in MENA countries, thanks in part to the prevalence of, and regional familiarity with, Egyptian soap operas, which are similar in length and function to Latin American telenovelas, providing Netflix a similar, but more regulatorily conservative, comparison to earlier case study Brazil (Middle East Media 2016).

Even before Netflix released its first original offerings, its existing programmes fell subject to MENA media censorship. One of the more high-profile cases involved the Netflix comedy news show *Patriot Act with Hasan Minhaj*. In the aftermath of the murder of Saudi Arabian journalist Jamal Khashoggi*, Patriot Act* released an episode condemning the extrajudicial killing and criticising the country's crown prince Mohammad Bin Salman (Middle East Monitor 2019). The ultra-conservative kingdom retaliated by demanding that Netflix remove the episode as it violated a Saudi Arabian law against the material which "impinges on public order, religious values, public morals, and privacy, through the information network or computers" (Middle East Monitor 2019). Netflix complied, citing at the time a desire to "comply with local law" despite "strongly support[ing] artistic freedom" (quoted in Middle East Monitor 2019). Reed Hastings would later confirm that the episode's removal was part of a deal made with Saudi Arabian authorities which would allow programmes with "objectionable" material, such as *OITNB, Sex Education*, and *Queer Eye*, to remain in the kingdom's Netflix catalogue in exchange for the censoring of *Patriot Act* (Middle East Monitor 2020).

Such a hypocritical stance is at odds with Netflix's commissioning strategy for MENA, which is to provide primarily fictional serialised drama programming that differs in both form and theme from most of the commonly-available programming in North Africa and the Middle East (Saeed 2020). Thus far, Netflix's existing and proposed television shows follow the high-end serial drama format of eight-to-ten-episode seasons and high production budgets to achieve realistic aesthetics (Keller 2020). This format differs from the long-form soap operas and melodramas of the MENA region, which typically run for a minimum of thirty episodes (Saeed 2020). Although the most popular type of serial fiction – the Egyptian soap opera – has a long history of social commentary which is often critical of governmental and political elites, they remain creatively limited by the religious restrictions placed on media that is shown on state-regulated networks (Faheem 2019). These restrictions work to Netflix's benefit, whose MENA content is aimed at telling local stories not seen on local networks because they are from the perspective of socially marginalised minorities such as women and young people (NMC 2020). Additionally, these stories are free to include content deemed too inappropriate for state-regulated television, such as swearing, violence, physical romantic activity, and drugs and alcohol. These factors provide examples that Netflix can point to when branding itself as an inclusive and progressive international network, even while its acquiescence to the Saudi Arabian governments' censorship demands reveal the company's commercial priorities.

Another benefit afforded to Netflix within MENA is access to diverse local minority talent, such as women and young creatives, whose ideas and presence in the MENA creative marketplace has been historically stifled because of conservative social values. While Netflix's first original programmes in international markets were with experienced creators – such as *Marseille*'s Dan Frank, *The Mechanism*'s José Padilha, and *Sacred Games*' Varun Grover – its approach to African originals appear to favour less experienced writers and 'fresh' talent. This was the case for *AlRawabi School For Girls*, Netflix's second Arabic language original series and its first Jordanian scripted drama. *AlRawabi* is created by Tima Shomali, a 34-year-old Jordanian actress, producer, and writer who had previously participated in Netflix's 2017 'She Rules' campaign, a series of videos spotlighting creative women in the Middle East, deliberately timed to coincide with Ramadan, the Muslim holy month (Netflix/News 2017). Considering that Ramadan is typically when media consumption is highest across North Africa, Netflix's timing suggests an intention towards publicising young, female storytelling in the region and taking credit by association, despite having done little more than providing a public advertisement in the case of this particular campaign (Mark 2018). For instance, then-Director of International Originals Simran Sethi described *AlRawabi* as, "essentially the first Middle Eastern young adult series that celebrates the role of women, not only on screen, but behind the scenes as well", citing the "fresh female Arab voices" involved in the project (quoted in Netflix/News 2019). Shomali seconded the sentiment, saying that it "depicts the stories and struggles of young Arab women in a light we hadn't yet seen before in the region, particularly with this age group", adding that her partnership with Netflix gives her the chance to present these narratives, rarely seen in their national media contexts, on an international scale (quoted in Netflix/News 2019).

Netflix is continuing to build on its female-centric commissioning strategy with *Whispers*, a 2020 Saudi Arabian original production written and directed by one of the kingdom's leading female directors Hana Al Omair (Saeed 2020). *Whispers*, an eight-episode mystery serial drama, is unconventional in both narrative and format for MENA programmes. It tells the story behind the mysterious death of a Saudi businessman using a Rashomon-like structure in which events are told from the multiple perspectives of the show's female-led cast, something Al Omair describes as "not the traditional storytelling structure that we are used to in the region" (quoted in Saeed 2020). *Whispers* depicts Saudi women as diverse and modern, showing lead characters with fashionable images, independent lives, and careers in areas like social media and graphic design. Al Omair notes that such portrayals are important because "these kinds of Saudi female characters are not shown to both international and Arabic audiences", as well as pointing out the necessity of accurately reflecting "modern life in Saudi Arabia that not many people have seen before, because it has rarely been presented that way" (quoted in Saeed 2020).

Fig. 59 A still from *Whispers* depicting the six female leads (Saeed, courtesy of Netflix, 2020)

Netflix's focus on filling the gap within some MENA national media contexts at least offers current representations of historically hidden segments of the MENA population, such as women, and particularly Saudi Arabian women whose media presences on the world stage (and often within their own national media) range from non-existent to stereotypical (Keller 2020). As an international IDTV company, Netflix can commission the kinds of context that is excluded from mainstream Middle Eastern media because of the region's strict religious or social guidelines. That *Whispers*, only the fourth Arabic language original to emerge from the region, presents a rarely seen perspective on the (albeit wealthy) present generation of Saudi women, from a Saudi filmmaker, and is now available in 193 countries, is demonstrative of Netflix's statement of intent with regards to their commissioning strategy in MENA as a progressive IDTVP that is platforming underrepresented local stories for an international subscriber base.

Netflix's commissioning strategies in less-explored markets like MENA and sub-Saharan Africa, which will be explored in more detail in Chapter Five, exemplify its current phase of original programming. In MENA, Netflix taps into a well of creative potential that has remained stymied because of conservative regulatory constraints that affect storytelling on and off screen. In so doing, it provides opportunities for MENA viewers who are amenable to diverse stories which better represent the current experiences of social minorities and young people. In SSA, Netflix amplifies the existing creative African sector by financially investing in the region's production hubs (like South Africa) and committing to showcasing African content on its international platform.

Netflix gives its international subscriber base the chance to consume exclusive and culturally distinctive stories from one of the least exported regions in the world. In return, Netflix gains early entry into a growth market and can diversify its catalogue of original holdings while increasing its chances for subscriber attraction and retention in Africa and other markets. However, while Netflix is receiving local support for its SSA efforts, its MENA strategy has encountered problems. *AlRawabi* has thus far been shelved following the fallout from Netflix's first Arabic language original, *Jinn*, a five-episode Jordanian teen drama that follows a group of teenagers who accidentally summon an evil spirit intent on destroying the world (Akerman 2019). Upon release, *Jinn* garnered criticism from Jordan's Media Regulatory Body and State Prosecutor, who reportedly felt the show did not represent the Jordanian way of life, and the country's Grand Mufti (the country's highest religious leader) who called the show "a moral breakdown" (Akerman 2019). Of particular note was *Jinn*'s use of swearing "as explicit as kol khara ('eat shit') and sharmoota ('whore') which, while prevalent in some English-language TV, has never been heard before in Arab productions", scenes of kissing between unmarried teenagers, and discussions about alcohol and drug use (Faheem 2019). Jordan's Tourism Authority, which had previously shown enthusiasm for the show's promotion of Petra, retracted its support, saying its "lewd scenes" were "a contradiction of national principles ... and Islamic values" (quoted in Van Ruymbeke and Debre 2019).

Jinn was poorly received by Arabic media in the region for lacking regional authenticity and appearing like a "carbon copy of tired American formulas" with little socio-political commentary (Faheem 2019). *Jinn*'s failure to live up to Netflix's intent of "portray[ing] the issues young Arabs face as they come of age" was attributed to the show's American-raised, Lebanese writers, Mir-Jean Bou Chaaya and Amin Matalqa and its executive producers, Elan and Rejeev Dassani, whom *The Middle East Eye* said "had nothing in their filmography remotely related to Arab culture" (Faheem 2019). The news outlet also said the programme had "no real insight into Jordanian teenage lives, no position on modern Jordanian society" and claimed that "with *Jinn*, Netflix has shown a clear ignorance of a region it has yet to grasp" (Faheem 2019). Additionally, it was reported that *Jinn*'s reception had negatively impacted the Jordanian production industry during a time when the sector had already been experiencing challenges due to an increase in taxes on foreign productions and script censorship (Akerman 2019). *Arab News* claimed that "after *Jinn*, some official and government organisations were scared to support any production" and private business were fearful of receiving social and regulatory ire (Akerman 2019). Netflix responded to the furore by doubling-down on the idea that its originals are filling a gap in the conservative market, commenting that it "understand[s] that some viewers may find it provocative but we believe it will resonate with teens across the Middle East and around the world" (Netflix quoted in Van Ruymbeke and Debre 2019).

With its infrastructural, economic, and socio-political disparities, the African continent will continue to prove challenging for Netflix. However, the IDTVP looks to be investing more determinedly into SSA's production sector, having made a public commitment to originating the region's stories and platforming them on an international scale, the strategies of which will be discussed in Chapter Five.

4.7 Conclusion

This chapter has examined Netflix's strategies and accomplishments across different international markets. Each case study reflects the variety of obstacles the IDTVP has faced and the difficulty of rising to meet the expectations it has set for itself. As demonstrated by Netflix's performances in markets as different as the UK and India, regulatory bodies are swiftly finding ways to regulate IDTVPs. Methods have ranged from imposing local content quotas in order to grow local production sectors, protect national broadcasters, or encourage more local content through co-production, or attempting to censor foreign IDTVPs because of perceived threats to national morals or the propensity for inaccurate portrayals of local culture on an international stage. Netflix's successes and struggles reveal the extent of its international impact. Even in such well-developed markets as the United Kingdom, Netflix's presence has hastened the timeline for policies around national content protectionism. It has also incentivised local networks and production houses to partner with Netflix and accommodate the different types of requirements and objectives that accompany streaming and IDTV where they would have had little impetus to do so beforehand. In markets with unique obstacles, such as India and Brazil, Netflix's purview as a software company gives it an incentive and advantage to take the alternative approach of investing in national internet and technology infrastructure in order to maximise its ability to cater to smaller screens and limited data plans. The streamer has used its industrial disruptions and relationships with creators to bolster its self-styled reputation as a truly international network, a company which does not simply export world-class local stories to the world, but creates them by finding and funding local talent whose distinctive localised themes and sensibilities will resonate with taste communities internationally. This approach is most recently seen in the African region and will be investigated in the following chapter.

Chapter Five: Content and Commissioning

We believe that people have always wanted authentic storytelling that is rooted in local culture and that locality actually illuminates the universal themes of the story – Greg Peters, Netflix Chief Product Officer (Peters quoted in Jha 2019)

5.1 Introduction

Chapter one introduced the concept of localising through technology. It discussed the way that Netflix uses its own in-house guidelines to provide standardised audio-visual translations (AVT) across its content which then serve as localisation by providing language and culture-specific references and translations. This chapter uses two Netflix-originated serial drama programmes to demonstrate the company's industrial localisation strategies in the commissioning, production, and post-production stages. The first case study is *Queen Sono*, Netflix's first African original, a production that exemplifies the company's efforts to commission high-end drama in markets whose cultures have been under-represented in the international arena. The second case study is the Netflix hit *Stranger Things*, an American serial drama whose many references to, and nostalgia for, American popular culture imbues it with appeal across Netflix's diverse domestic and foreign markets.

Both *Queen Sono* and *Stranger Things* demonstrate locality insofar as the concept relates to Netflix's commissioning strategies. *Queen Sono* utilises a mix of African languages, is shot in locations across the continent, and foregrounds contemporary African issues like neo-colonialism and terrorism that have socio-historical roots. *Stranger Things* makes use of intertextual references to iconic 1980s American media, music, and artifacts, all of which identify the programme as representative of a version of 1980s American suburbia. This chapter looks at how Netflix uses industrial localisation to make *Stranger Things*' accessible to international subscribers. It also examines the ways in which Netflix exploits and enhances *Stranger Things*' association with 1980s Americana by incorporating branding within the show's fictional narrative and as part of Netflix's real-world promotion of the programme. This chapter argues that Netflix capitalises on its decentralised infrastructure, technological affordances, internet distribution platform, and international presence, to sell the idea of locality to its subscribers. In addition to these facets of its business model, Netflix's localisation strategies take advantage of structural gaps in the market for non-Western and non-English language programming to promote *Queen Sono* as an African media product, and capitalises on an international familiarity with American cultural hegemony to accentuate Stranger Things' nostalgic 1980s Americana appeal. Because of Netflix's availability in 190 countries, its strategy of 'internationally local' original programming appeals to its 195 million worldwide subscribers by providing content that merges cultural specificity with universal subjects (Statista 2021).

5.2 Transnational Commissioning and Localisation

In September of 2020, *Vulture* reported that "Netflix just disrupted itself" when a restructure resulted in the departure of Cindy Holland, the 18-year company veteran who served as Vice President of Original Content and English-language content Chief (Adalian 2020). Replacing her is Bela Bajaria, formerly the Vice President of Local Language Originals, who previously managed all non-English television programming (Steigrad 2020). More significant than Holland's exit and Bajaria's promotion is the combination of their two portfolios into one, creating Bajaria's new position as Head of Global TV (Steigrad 2020). Although US commissioning and English-language programmes will continue to play a huge role in Netflix's content strategy, the restructure signals the IDTVP's commitment to allocating more resources towards foreign-language content-creation in international markets.

Since her appointment in September 2020, Bajaria has been restructuring the company's domestic television operation to centre more on "tentpole" shows and maximising the expensive 'mega deals' discussed in Chapter Three (Kanter and Andreeva 2020). Bajaria also reaffirmed Netflix's interest in non-U. S subscribers, saying she "wanted to erase this idea that there is US content and 'international' content – all content is local for our members, and sometimes they want to watch in a language other than their own, which Netflix makes incredibly easy and satisfying" (Bajaria quoted in Kanter 2020). As illustrated by Bajaria's comments about promulgating local programming, Netflix's commissioning goal appears to be the production of transnational content (the majority of which is serialised television drama) that is exclusively owned by the company. Defined by Dunleavy, "'Transnational TV drama' refers to programmes intended and designed for distribution to foreign markets" (2020, 1). To achieve this goal, Netflix has invested its resources into international and foreign-language originals, with a focus on serial drama television programmes. Dunleavy terms this type of strategy "direct commissioning" which describes the commissioning of a "new drama by a single, foreign-domiciled transnational network, in partnership with one of more production companies operating within a given national market" (13, 2020). Dunleavy explains that:

> Even though 'direct commissioning' simulates TV drama's traditional relationship between a given national TV network as 'buyer' and the one or more domestic indie companies who act as 'producer', it also fulfils one of the traditional purposes of TV drama co-production by connecting foreign finance with domestic creative industries. What is new in the multiplatform era and re-defines 'direct commissioning' in the transnational environment for which high-end TV drama is now created, is that this approach to coproduction is motivated by international rather than national outcomes. This 'direct commissioning' differs radically from earlier approaches to drama creation and co-production because it bypasses the necessity for a national TV network to be involved (13, 2020).

As a result, direct commissioning avoids the issues of "negotiat[ing] the cultural specificity of an emerging drama between national and foreign networks who tend to bring different imperatives to this" (Dunleavy 13, 2020).

Netflix’s strategies to facilitate directly commissioned content are twofold. The first strategy is the expansion of its international physical presence, resulting in at least one flagship Netflix office in five of the world’s seven continents. The second strategy involves working directly with local creators, producers, and writers, with a particular focus on telling locally specific stories and searching out properties or creators that are known locally but unknown internationally. Netflix tends to pursue this latter strategy in one of two approaches. The first strategy involves sourcing contemporary stories from lesser-known local artists, with some preference going towards content created by, or about, young people or women. Industrially, this approach allows the company to buy and develop original properties that are unlikely to have already been shopped to local competitors. Furthermore, Netflix benefits reputationally for platforming stories and artists that are typically underrepresented in audio-visual media and the film and television industries. The second strategy takes the opposite approach of adapting an existing local property or recruiting veteran or well-known creators in the region. Netflix can offer seasoned professionals the kind of international exposure that smaller foreign-language markets struggle to provide. Additionally, Netflix can promise competitive budgets for popular local properties which have never been adapted to television.

Each outcome allows the streamer to gain traction with local fandoms or subscribers who may be familiar with the adaptation or its creator. Both approaches serve the end goal of Netflix owning an increasing catalogue of local content that its international subscribers are likely to find appealing because of what Timothy Havens (speaking about TV dramas designed for international distribution) calls “conspicuous localism” (2018):

> The conspicuous localism of the cinematography, storylines, and languages of contemporary transnational television drama are, I believe designed to appeal to a cosmopolitan international audience. For subscribers to streaming platforms, dramas with a strong sense of authenticity offer cosmopolitan cultural capital to affluent viewers in a way that less conspicuously local production strategies do (Havens, 2018).

This pursuit of 'conspicuous localism', enabled by the specificity of local stories and the diverse perspectives of local writers and producers, has been greatly assisted by the convenience of internet distribution, the visibility of recommendation algorithms, and the accessibility of subtitling and dubbing services.

5.3 Production Hubs at Home and Abroad: Spain and *La Casa De Papel/Money Heist*

Netflix's plan to invest USD$1 billion over the next decade in original programmes owned by the company began domestically with the 2018 purchase of Albuquerque Studios in the state of New Mexico (O'Falt 2018). The complex spans a total of 232,000 square feet split between eight sound stages, production offices, and a spacious backlot (O'Falt 2018). In addition to a discount purchase price of USD$30 million, Netflix received USD$14 million in state and city funding towards the sale, and its productions in the area will receive a state tax credit of between 25-30 percent (Spangler 2018). In return, the company must honour its investment agreement of USD$600 million in direct spending in New Mexico before the end of 2023 and a further USD$400 million in direct or indirect spending by 31st December 2028 (Spangler 2018). Netflix's ownership of Albuquerque Studios enables it to dominate most of the resources within the reliable New Mexico production sector, which is favoured by networks and studios for its geographic accessibility from Los Angeles, its lucrative tax incentives, and its relaxed work requirements for out-of-state crew members (O'Falt 2018). New Mexico is expected to see the construction of more production spaces and Netflix is expected to dominate the area for the foreseeable future (O'Falt 2018).

Netflix's internet-based operation has typically proven advantageous for the company with regards to international accessibility, market entry, and a reduction in the overhead costs that accompany physical offices. However, in 2019, as part of the company's plans to expand its international content output, Netflix announced that it was opening production hubs in Canada, Spain, and London, in addition to offices in Germany, the Netherlands, France, Brazil, and Australia, which are to serve as regional headquarters for the company

(Roxborough and Ritman 2019). Prior to this expansion, Netflix's only significant physical presence outside of the United States was in Asia, having opened offices in India, South Korea, Singapore, and Japan between 2015-2018 (Clarke 2019). While not as grand in scale as Albuquerque Studios, the company's physical premises in these countries act as an architectural statement of Netflix's international ambitions. As part of a deal with the Pinewood Group, for example, Netflix established a permanent UK production base at Shepperton Studios, giving the company exclusive access to the London site's 14 sound stages and 10 acres of backlots (Sweney 2019). Netflix's exclusivity is limited to Shepperton's current capacity, meaning that other companies will be able to access its future expansion, which is predicted to add an extra 130 thousand square feet to the facility (Sweney 2019). Netflix's London office will be 20 thousand square feet, a modest size when compared to its 137,000 square foot second office in Mumbai (Clarke 2019). The Mumbai office also serves as a base for VFX work (Rakheja 2020). This is a necessary function for the company's Indian endeavours due to the country's lack of pre-production efficiency for high end programmes, which then requires correction in post-production (Rakheja 2020).

Of particular interest is Netflix's Spanish production hub, its first and largest European hotspot. Based in Madrid, the hub occupies a 22,000 square meter compound consisting of five sound stages, each with its own office space, technology labs, and annexes for wardrobe and hair and makeup (NMC 2018). In contrast to Netflix's North American hubs, Madrid's compound is "designed principally for TV work and *not* gargantuan movie blockbuster production" (Hopewell 2019). Netflix's interest in Spanish original programmes is likely partly due to the surprising success of *La Casa De Papel*, also known by its English title as *Money Heist* (Tassi 2020). *La Casa De Papel* is a crime heist serial that follows a crew of master thieves as they attempt to rob the Royal Spanish Mint. The show was commissioned by the commercial Spanish channel Antena 3 for a prime-time schedule slot. It was originally intended as a limited serial, a format more suited to the 'heist' subgenre, with fifteen 70-minute episodes (a customary running time for Spanish prime-time programmes) split over two parts because of production budget constraints (Pickard 2018). After parts one and two had finished airing on Antena 3, Netflix acquired the global streaming rights from Antena 3's parent company Atresmedia, reediting the episode lengths to 50 minutes to make these more acceptable for international viewers and extending the number of episodes in both parts (effectively 'seasons') from the original 15 to 22 (Armstrong 2019). Netflix released its re-cut version of part one of the newly titled *Money Heist* in December of 2017 and part two in April 2018, where it quickly became the most-watched non-English language programme in the streamer's catalogue, both in Spain and internationally (Arnold 2018). This viewing milestone coincided with figures reporting that Netflix had made more money from international streaming than domestic streaming for the first time in the company's history, a statistic that seemed to validate its efforts to expand into non-US territories (Solsman 2018).

Much of the show's appeal was attributed to the complexity of the plot, which used flashbacks, an ensemble cast, and violence, as well as the application of the heist subgenre in a television format. Working in *La Casa De Papel*'s favour was the writers' decision to subvert heist tropes by foregrounding the show's female characters, which Spanish television critic Mariola Cubells described as "an innovation for Spanish TV" (quoted in Armstrong 2019). Its resonance with international subscribers has signalled something of a watershed moment for Spanish television. Culturally, Cubells argued that the Spanish television industry "had not managed to export culture, ways of life, of thought… until *La Casa de Papel*" while, industrially, the programme's ability to capture mass-market attention played a role in convincing Netflix – and its competitors – to invest in Spanish television production (Cubells quoted in AFP 2019). Alejandro Rojas, Director of Analytics at Parrot Analytics, agreed, commenting that *La Casa De Papel* was "a remarkable milestone for a Spanish production", praising series creator Alex Pina for discovering "a powerful way to connect with audiences across cultures and languages" and crediting Netflix with "leveraging its international platform to catapult the series into a truly global hit" (Rojas quoted in Katz 2020).

Netflix brokered an agreement with Atresmedia to produce parts three and four of *Money Heist* – with vastly increased budgets – as Netflix originals, exclusively available on the Netflix platform (Hopewell 2018). This agreement means that *Money Heist* is now a "cross-platform co-production", a term coined by Dunleavy to refer to "a collaboration that pairs national broadcasters with transnational premium networks" (3, 2020). Part three was entirely shot at Netflix's Madrid production hub, which saw over 13,000 Spanish cast and crew members working on Netflix originals in 2018 alone, these including other Spanish-language successes such as *Cable Girls* (season 4) and *Elite* (season 2) (NMC 2019). Parts three and four were also successful with international subscribers. Netflix claimed that 65 million of its global households had viewed part four within a month of its release (Patton 2020). It is worth mentioning that the company's viewing metrics provide generous definitions for what counts as a view, so while *Money Heist*'s viewership cannot be accurately measured against non-Netflix content, it has performed very well relative to other programmes in the streamer's catalogue. Parrot Analytics and TV Time, two independent data tracking agencies, provided some verification of *Money Heist*'s international appeal, though caution must be applied as Parrot's numbers only include IDTVP viewership, and thus exclude any linear-channel viewing. With this limitation in mind, Parrot Analytics confirmed that *Money Heist* part three was the fourth most in-demand series in the world, during its first week of release, while part four's release saw it become the most in-demand series globally for an IDTV-only audience (Katz 2020).

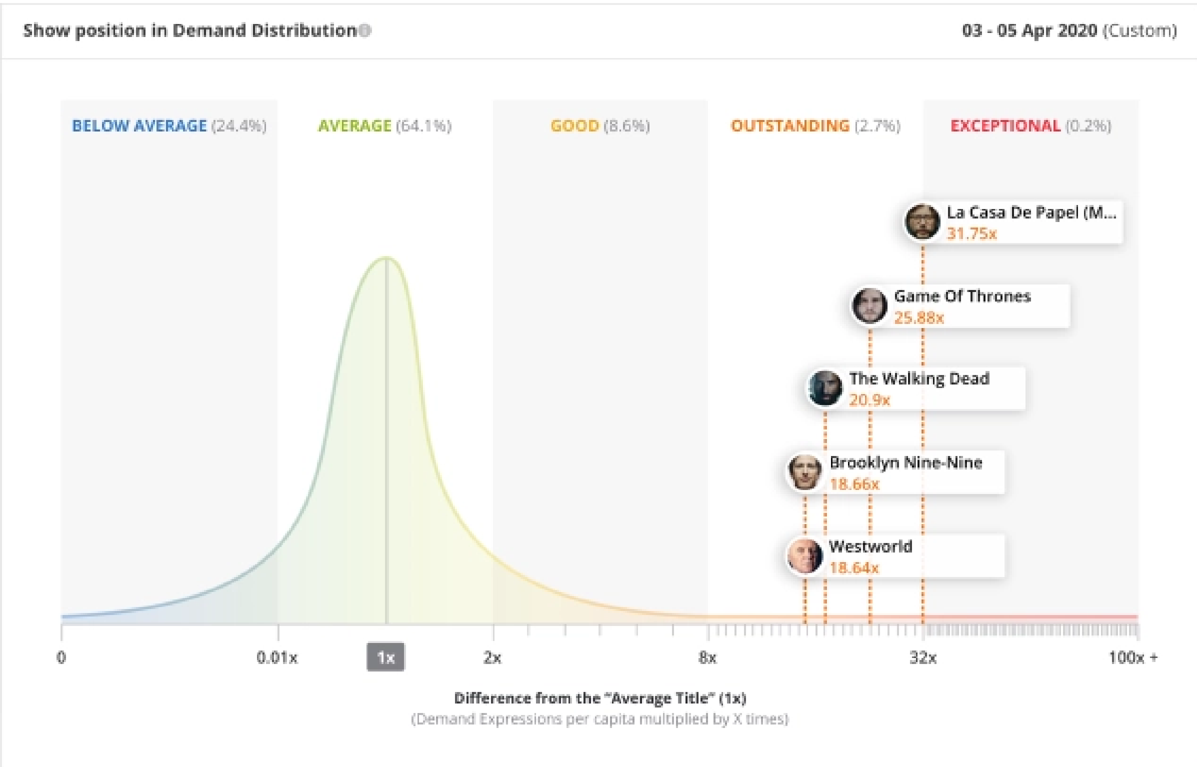

Fig. 60 (Parrot Analytics, courtesy of *The Observer* 2020)

The week of Part 4's release, TV Time reported that *Money Heist* was the most binge-viewed programme in the world, meaning that viewers had watched four or more episodes in one day (Katz 2020).

Reed Hastings confirmed that the hub was part of a long-term strategy of assimilation into the region, underlining that Netflix's aim is "to be a part of the Spanish creative ecosystem. We are investing for the long-term, we are here to stay and to participate" (NMC 2019). The Madrid production hub represents Netflix's 'early adopter' attitude in the region, but also represents the company's spotlighting effect on the production sectors it chooses to invest in (Green 2019). Spain had a mature television production sector well before Netflix's entrance, with a focus on producing serial dramas for primetime slots on free-to-air channels. In 'setting up shop' in Madrid, Netflix offers higher production budgets, creative freedoms, as well as ease of access to the company's millions of international subscribers. This combination offers enticing new opportunities to Spain's experienced local production sector, whose companies have hitherto needed to produce ambitious dramas on low-to-medium budgets. In so doing, Netflix is offering the Spanish sector opportunities to create and showcase their best new programmes while benefitting from the subscribers and international attention that these now-Netflix originals are bringing to the company. Following Netflix's lead, other companies are recognising Spain's potential as a production centre. Viacom set up an international studio in Madrid, followed by two prominent European production and distribution companies – French firm Federation Entertainment and German-based business Beta Film – who both established bases in the city (De Pablos 2019). Companies with existing studios in the region are expanding their productions in an apparent response to the influx of international competitors. *The Hollywood Reporter* claimed that Netflix's arrival was "credited with prompting Spanish platform Movistar+ to begin producing more — and more ambitious — series as well as films" while both HBO España and Amazon Prime are said to be increasing their Spanish commissioning (Green 2019).

The arrival of international companies, precipitated by Netflix's interest in commissioning more Spanish content, appears to have been mostly well received by the country's production industry. Enrique Lopez, CEO of Spanish outfit Apaches Entertainment, told media that he, "see[s] only advantages to Netflix's Madrid hub", a sentiment shared by Morena Films founder Alvaro Longoria, who said the streamer had instigated a "revolution" in Spain due to "bigger budgets and much bigger ambitions" (quoted in Green 2019). As discussed in Chapter Three, Netflix has steadily focused its efforts on retaining full ownership over its 'direct commission' productions. Partnering with the streamer requires Spanish producers to relinquish the rights to their content, a trade-off which is made more appealing because of the production sector's reliance on government subsidies, existing competition for funding, and the likelihood of international exposure on Netflix's platform (Green 2019).

5.4 Developing Known Properties and Unknown Talent: *The Protector and Paranormal*

The company's top content leadership have confirmed Netflix's strategy of "uncovering gems in local markets and then ushering them onto Netflix's global stage" (Kanter 2019). With regards to serial drama, Netflix favours sourcing new ideas from fresh talent or finding existing stories which are popular locally but not internationally known, particularly in the SSA/MENA market, in which the company seems to be committing to its localisation strategies. One enduring source of local material is successful novels. As noted by Dunleavy, "literary adaptation is gaining ground" in large part because the novel format's seriality and potential for longevity "offer a compelling source for adaptation as high-end TV drama" (2020, 6-7). In this context, it is unsurprising that Netflix is turning its attention towards foreign-language book opportunities, something Vice President of International Originals Kelly Luegenbiehl discussed while attending the Frankfurt book fair (Nawotka 2019). Speaking to publishers at this event Luegenbiehl underlined that, "What is exciting is just how quickly audiences have found content to enjoy from outside their own countries and languages" (quoted in Nawotka 2019).

Luegenbiehl emphasises the mutual benefits of pairing Netflix's international viewership and simultaneous 'all-territories' delivery model with local stories and local languages, saying "Netflix brings local stories to a global audience in a way that has never been done before… [W]hen a series is released all around the world, in a wide variety of languages, on the same day, that is a really exciting moment for us" (quoted in Nawotka 2019). Luegenbiehl pointed to two MENA-region Netflix direct commissions which were optioned from books – Turkey's *The Protector*, an existing Netflix serial drama which ran for four seasons, and Egypt's *Paranormal*, a Netflix serial drama currently at one season (Kanter 2019). *The Protector* reflects the company's approach of sourcing 'local gems' from unknown creators, particularly those with historically limited creative opportunities. The Turkish novel on which it was based was published by first time author N. İpek Gökdel in 2016 (Arsiya 2018). Although Gökdel is an experienced writer for Turkish television, she was unable to successfully sell the first iteration of *The Protector* (then a television script) to any network until Netflix came across the newly published novelisation of the story (Arsiya 2018). Only two years after the book's publication, the first season of *The Protector* was released on the Netflix platform. The programme seemed like a fitting choice for adaptation. The plot takes place in modern-day Istanbul, described as "where East meets West" in Netflix's official press release for the show, and incorporates the local appeal of historical Turkish mythology within the international familiarity of a 21st Century cosmopolitan city (Netflix 2018). *The Protector* was made by Turkish production house O3 Medya, allowing it to benefit from local expertise, but was made with international viewers in mind since its episode numbers and lengths of 7-10 episodes at 40 minutes each are much shorter in comparison to the typical episode lengths of Turkish dramas, which run for around 100 episodes at an average of 130 minutes (Saeed 2019). Luegenbiehl says that *The Protector* is "well-loved in Turkey but then we saw that the show also appealed to people in Latin America, Europe, the Middle East and Asia" (quoted in Dawson 2019). Her assessment indicates that the programme served its purpose of representing Turkish creative originality while performing well with international subscribers, as per Netflix's 'internationally local' approach.

Paranormal was released in November 2020. It follows haematologist Refaat Ismail and his Scottish colleague, Maggie McKillop, as they encounter unexplainable mysteries. In many ways, *Paranormal* typifies the kind of property that Netflix wants for its 'globally local' content. *Paranormal* is an 'unknown gem' internationally, having never been translated into any other language, but the 83-novel series on which it is based is one of the bestselling in the Middle East (Ali 2020). Its author, Ahmed Khaled Tawfik, is a pioneer of Arabic gothic horror and science fiction literature and is credited with bringing the genre to Egypt and the wider MENA region with *Paranormal*'s first publication in 1993 (Ali 2020). Despite selling over 30 million copies and accumulating a massive readership base, Tawfik's popularity with Middle Eastern youth was offset by his relative anonymity within the Arabic mainstream, a discrepancy credited to the longstanding cultural rejection of the horror genre in Arabic storytelling (Essam 2019). This dissonance was summarised in *GQ Middle East*, which write the following about Tawfik's death in 2018:

> Attracting thousands of young mourners to his funeral, the footage sent shockwaves through the Cairo establishment, bewildered at how a dead novelist who they had barely registered as a legitimate cultural influence could so effortlessly draw more Egyptian youth than an election (Ali 2020)

Paranormal is thus an opportunity for Netflix to capitalise on a property that seems rife with potential. From a regional point of view, it has a large, built-in fanbase who are now tech-savvy earners and more likely to be receptive to a television adaptation that would never have been made for Egyptian television because of public and advertiser aversion to horror and science fiction content. Modern Egyptian media has not had significant international exposure in recent decades (Vivarelli 2020). *Paranormal*, which is set in 1969 but narratively visits 1941 and 1910, provides international viewers with an Egyptian story that is unique (for the region) while exposing them to depictions of the country's landscapes, architecture and culture, during time periods that, outside of North Africa, have rarely been seen in screen fiction. Consistent with Netflix's internationalisation efforts, *Paranormal* will be dubbed in 9 languages and have subtitles available in 32 countries, thanks to the NP3 program (*Egypt Independent* 2020). *Paranormal* will also have the small but significant honour of being the first Egyptian series to provide both audio and visual descriptions for the benefit of subscribers with visual or auditory impairments (*Egypt Independent* 2020).

Additionally, *Paranormal*'s female lead, played by British-Lebanese actress Razae Jammal, is bilingual in the programme, speaking both Arabic and English. Netflix's Director of Arabic Original Series Ahmed Sharkawi referred to *Paranormal*'s high-end ambitions by likening it to *The Crown*, as both are dramas with strong regional and international appeal (Vivarelli 2020). *Paranormal* exemplifies the kind of Egyptian drama programming that could have only existed as the result of Netflix's direct commissioning strategy. As discussed in Chapter Four, the television networks operating in Egypt have no incentive to fund short-form, high-end complex serial dramas, particularly those with an untested concept (or premise). This reasoning is because Egypt's most popular domestic drama format, the 40-episode medium-budget soap opera, makes up 70 percent of MENA's on-air programming (Oliver Wyman 2013). Furthermore, the inclusion of any language other than Arabic, which is spoken in all MENA countries, creates unnecessary confusion for, and the potential alienation of, majority-Arabic-language MENA viewers, as well as the advertisers whose funding the Egyptian television industry relies on. Netflix's MENA commissioning strategy is aimed at achieving content exclusivity and reputational differentiation. It recognises the benefits of adapting a book series like *Paranormal*, with its young fan base and what (for this region) is a niche genre, into a high-end drama that interweaves 'complex serial' characteristics (see Dunleavy 2018, 2019) with such other elements of Netflix's industrial/creative strategies as those outlined below.

An example of Netflix's plan to recruit and nurture new creative talent was its Creative Collective Showrunner's Workshop (Stanhope 2019). Held in December 2019 in Amsterdam, the Workshop brought together writers from South Africa, Egypt, Turkey, Italy, France, and Germany for a two-and-a-half-day intensive course aimed at familiarising them with the processes of developing a television programme from beginning to end (Stanhope 2019).

Each writer was deemed an emerging talent with the company and had some Netflix writing credits in their resume. The Workshop covered the creative, practical, and industrial aspects of running a television production. It included "everything from best strategies for staffing a writer's room to the notes process, specifically how to receive notes from creative executives and give notes to other writers on their series", alongside networking time with Netflix's creative executives who offered advice about the company's preferences and practices (Stanhope 2019). The writers were also put through an exercise with Jason George, a producer on the Netflix original *Narcos*, which taught them how to structure a six-episode season (Stanhope 2019). This was followed by a tutorial given by a member of the company's physical production team that explained the showrunner's role on set, and in the pre-production and principal photography phases, which Netflix described as useful because most of the attendees "had not been able to visit a set in their home country" (Stanhope 2019).

In addition, the writers were given presentations from members of Netflix's VFX and post-production teams to learn about how programmes are edited, coloured, and enhanced digitally in their final stages (Stanhope 2019). Lastly, Netflix photographers took professional portraits of the writers, to be used for promotional material such as their IMDB profiles (Stanhope 2019). This action also provides some standardisation over the professional aesthetic of Netflix-affiliated writers, which reflects well on the Netflix brand. Although the workshop was the first of this sort to be held by the IDTVP, it demonstrates Netflix's resources at work. Similar to the P3 program, the company is drawing on its international talent pool to mentor up-and-coming writers in promising and emerging markets. Since it has the experience and infrastructure at the pre-production and post-production stages, Netflix can identify raw creative talent and refine it through a 'crash course' type event which attempts to fill in the knowledge gaps that accompany inexperience.

5.5 *Queen Sono*: Profiling African Stories

> Controlling the narrative is really important because we're tired of seeing, particularly, just struggle stories – Pearl Thusi (cited in Yohannes 2020)

5.5.1 Background and Plot

Queen Sono, a South African serialised spy drama, premiered on the Netflix platform in February 2020. Consisting of 6 episodes in its first season, each between 40-45 minutes, *Queen Sono* (played by Pearl Thusi) follows the title character, a rebellious spy working for the government's Special Operations Group (SOG). Over the course of the show, Queen unravels the conspiracy surrounding the assassination of her anti-apartheid activist mother and battles the influence and terrorism of a Russian paramilitary company. The plot also explores themes of neo-colonialism and political corruption in post-apartheid South Africa. *Queen Sono* was confirmed for a second season only two months after its premiere, however the decision was reversed in December 2020 (Garter 2020). Season two would have followed Queen as she traversed the African continent. Yet, sources registered the difficulties of shooting on-location across national borders (in service of the show's high-end aesthetics) during the restrictions of the ongoing Covid-19 pandemic (Grater 2020).

Fig. 61 A promotional still taken from one of *Queen Sono*'s actions scenes (Netflix 2020)

Queen Sono was created by Kagiso Lediga, a South African and Tswana comedian, producer, writer, and director. 42-year-old Lediga, who shares writing and directing credits on *Queen Sono*, had produced three programmes before his partnership with Netflix. The first was the influential South African sketch show *PMS*, followed by the satirical late-night news show, *Late Night News* (which was nominated for two international Emmy awards) and the live variety programme, *The Bantu Show* (Wagner 2019). Despite his lack of experience in creating high-end drama, Lediga and his production company Diprente caught Netflix's attention in 2018, when the streamer decided to distribute Lediga's first feature film *Catching Feelings* (Diprente, 2020). A Netflix/Lediga/Diprente partnership makes sense for all parties. Diprente is made up of Lediga and his long-time collaborators, who have experience and credibility in the South African film and television industry, but for whom larger international recognition has remained elusive. "It's always been the drive", says Lediga, "we've always had this thing of doing local stories with a global perspective" (quoted in Nyker 2019). Diprente's goal of making local content for international viewers aligns with Netflix's 'direct commissioning' strategy. "When Netflix picked up [*Catching Feelings*] we saw it working with audiences around the world", says Lediga, "we saw people were thirsty for these types of stories" (quoted in Nyker 2019).

5.5.2 Localising Africa in Production and Conceit

Similar to *Stranger Things*' status as a flagship original for Netflix America, *Queen Sono* is something of a flagship programme for Netflix Africa. Dorothy Ghettuba, the company's head of African Original Programming, emphasises the ways in which *Queen Sono* fulfils the streamer's direct commissioning goals in the region. The first goal is to spotlight female-led storytelling, with Ghettuba calling the programme, "an unprecedented representation of a strong female black lead in African television" (quoted in Kanter 2020). The second goal is to export African creativity to a foreign audience, something Ghettuba claims *Queen Sono* achieves by portraying the "complexities and nuances of the African experience" (quoted in Kanter 2020). Ghettuba posits that *Queen Sono* has "marked the beginning of our journey to introduce the world to exciting stories that are made in Africa", describing the programme as an example of the “best-in-class African stories” that the streamer wants to commission and stream internationally (quoted in Chen 2020). Ghettuba pronounced the company’s 190-country operation as being the “fastest way to export our stories and our culture to the rest of the world”, arguing that African artists do not have to “make it in Hollywood” and can now be “a superstar in [their] backyard” (quoted in Chen 2020). Ghettuba’s idea of eschewing overcrowded and Western-centric production centres while retaining access to international markets was echoed by Erik Barmack, Netflix’s former Vice President of International Originals, in 2018. At this time, Barmack stated that “the big message [Netflix] wants to communicate to talent is you don’t have to leave home to get big audiences, and you don’t have to choose Hollywood versus your own country” (quoted in Clarke 2018). Ghettuba reiterates that “originals are very, very important to us. We want [subscribers] to know that if [they are] looking for the best African stories, then you will find them on Netflix”, adding that “we are going to expand heavily to ensure that goal is met” (quoted in Chen 2020). Lediga is perhaps more open about Netflix’s commercial motives for pursuing international content. As he explained in a *Time* magazine interview:

> Obviously there’s been American cultural hegemony. Americans have been very successful in selling their culture and distributing their content abroad, and I think now, they’ve saturated their own markets. You don’t want it to be this insular story that only makes sense to people in Johannesburg or people in the southern African region. But it also does a creator no favours to play so hard to the universal that the story loses what makes it compelling in the first place. The more specific you are, the more authentic a story is. The rest is trying to make it clearly understandable. (Lediga quoted in Haynes 2020)

In these assertions, Lediga also demonstrates a keen awareness of Netflix’s rationale as to the international appeal of non-American programming. He describes how local specificity can come across to viewers as cultural authenticity (problematic though the term is) as well as respond to the difficult balancing act that non-American content must achieve between universal resonance and cultural specificity. *Queen Sono* demonstrates Netflix’s localisation strategies not only by successfully exporting world-class African programming to international subscribers but also by delivering value to subscribers in the ‘local’ African market by engaging with contemporary South Africa's issues such as the legacy of apartheid, political corruption, and the exploitation of national resources by elites. Elaborating on these issues, Lediga explains that:

> Our recent history is apartheid. And it kind of is like the ghost — it is the elephant in the room. The legacy of apartheid is everywhere. It's pervasive in general society. And for me, it's very important that that narrative doesn't get lost. You know, like for young people who ... might have been born 10 years ago, for them, it might just be regular that black people are always working on the side of the roads while, you know, the yards and the spaces are owned by white people. If you don't sort of explain why that is, people are just gonna think that's how God intended it. ... The universe just likes it that way, you know? And so I felt in this piece of entertainment, it's important to tell that history. ... I thought it would be like a cool thing to imbue the story with the history and see how that goes (Lediga quoted in Martin 2020).

Using the spy genre enabled Lediga to plug a hole in the market for African spy stories while also foregrounding current socio-political issues. "The world doesn't necessarily have a [spy genre] context for Africa", says Lediga, "what better way to show Africa off than through a spy story where you have this great female agent who traverses the continent?" (quoted in Martin 2020). "It's important to show the contemporariness of the African narrative", Lediga continues, "you can infuse [the spy genre] with history. You get to tell the story of a culture very easily. Telling a story like this makes it urgent, makes it present" (quoted in Martin 2020). Lediga's comments, which draw attention to *Queen Sono*'s vision of pan-African female-led storytelling, encapsulate Netflix's ambitions regarding its African programming.

Queen Sono demonstrates Havens' idea of 'conspicuous localism' in its "storylines and languages" which cater for a domestic as well as a "cosmopolitan international audience" (Havens 2018). While primarily shot in South Africa, *Queen Sono*'s filming took place across 37 different locations on the African continent, including Kenya, Tanzania, Nigeria, and Zimbabwe (Salazar 2020). Lediga confirmed that season two's ambitious number of filming locations played a large role in the show's cancellation because of Covid-19 health and travel restrictions, noting "we wrote a beautiful story that spanned the continent but unfortunately could not be executed in these current trying times" (Lediga quoted in Grater 2020). Scenes from season one's locations ranged from luxury yachts, casinos, stadiums, glamourous downtown cafes, and upscale urban metropolises, as well as rural townships and economically depressed suburbs. *Queen Sono*'s expansive production was a deliberate attempt by Lediga to represent Africa's "vastness of cultures" and depict the multi-layered nature of its socio-economic realties without validating the reductive and infantilising stereotypes of Western media (Lediga cited in Haynes 2020).

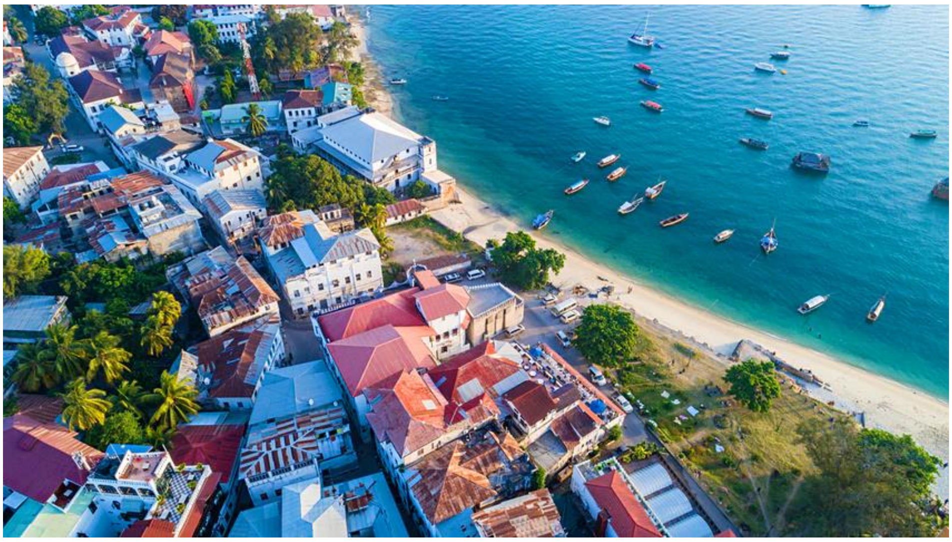

Fig. 62. A still of Zanzibar, as shown in *Queen Sono* © Nataly Reinch / Shutterstock (Courtesy of *Lonely Planet*)

Fig. 63. A still of Johannesburg, as shown in *Queen Sono* © MariusLtu / Getty Images (Courtesy of *Lonely Planet)*

Fig. 64. A still of a neighbourhood in Johannesburg as shown in *Queen Sono* © MariusLtu / Getty Images (Courtesy of *Lonely Planet)*

In keeping with the Lediga's aim to showcase the breadth of African cultures, *Queen Sono* also features spoken dialogue in 11 different languages, among them English, Swahili, Afrikaans, and isiXhosa (Haynes 2020). For international viewers, the programme's shooting in multiple countries visually affirms *Queen Sono*'s status as a high-end drama. In combination with the show's multitude of languages, *Queen Sono* delivers on Netflix's promise to showcase the diversity of African countries. For domestic viewers, *Queen Sono's* expansive approach was a purposeful choice on Lediga's part to make a statement about South Africa's connection to the rest of the continent. "For South Africans, there was a lot of isolation because of apartheid, so this idea of 'Africa' is always vague", Lediga says, "South Africans, both black and white, almost have this European or Western notion of Africa. It was important for me to say that we are all on this continent together" (quoted in Haynes 2020).

The show's plot and conceit were partly a response to what South African president Cyril Ramaphosa called a "crisis of violence against women", referring to a period in 2019 when femicide and sexual assault rates reached an all-time high, leading to national protests (Ramaphosa quoted in Francke 2019). Lediga explained that he wanted his heroine to be "a woman that embodies something different, the idea that women can fight back", and that a

"15 year old, 16 year old seeing *Queen Sono*, that's a great image", in both a reference to, and a rebuke of, the gendered violence occurring in the country (Lediga quoted in Haynes 2020). Thusi agrees, saying that *Queen Sono*'s female participation behind, and in front of, the screen, reflects the resilience of African women in the real world. "In a world that socially and economically puts you at the bottom of the food chain, African women are still here", Thusi says, "still accomplishing great things despite it all" (quoted in Kimeria 2020). Leugenbiehl affirms that the show's female-centricity aligned with the company's commissioning targets, commenting that its "strong female character was really something that also really drew [Netflix] to it" (quoted in Mentor-Fredericks 2018). Barmack agrees with this sentiment, adding that *Queen Sono* "puts Pearl [Thusi] in the same category as other strong female characters like Claire Underwood in *House of Cards* and Jessica Jones [in *Jessica Jones*]" (quoted in Mento-Fredericks 2018). Such comparisons from the company's executives confirm Netflix's aims of originating more women-centric programmes as part of its international commissioning strategy. Although this strategy is ostensibly an effort to offset the television industry's gender-imbalance both on and off screen, women-centric stories primarily serve Netflix's bottom line. They help to differentiate the IDTVP as an employer and content provider in markets that lack women's representation in the screen industries and particularly in high-end, enduring dramas. Female-led stories thus benefit Netflix reputationally and commercially, as it can offer its financial and professional resources, in addition to its international audience, to writer-producers whose gender or whose gendered drama concepts have not been sought after by other networks in the area.

5.5.3 "The White Europeans Are Deciding What's Best For Africa": Plot Themes and Real-World Parallels

As demonstrated by the above quote from episode three, *Queen Sono*'s themes of enduring racism and foreign economic exploitation are particularly relevant to its status as the first African original programme to be funded and owned by an American IDTV company. Several references are made as to the depiction of the African continent in Western media, as well as to the characters' fight to regain control over international interference in African political and economic affairs and their stated aims of empowering African peoples against their exploitation by foreign interests. This theme is exemplified by the plot's main antagonists, Superior Solutions, a Russian private military company. Headed by the daughter of a Russian crime lord, Ekatarina, Superior Solutions aims to take control of Africa's precious metals reserves, starting with South Africa. The company manipulates the members of the Watu Wema Brigade, a group of Black Nationalist militants, into committing terrorist acts, in order to coerce the country's (fictional) corrupt president to declare a state of emergency and give Superior Solutions a legitimate excuse to deploy their forces.

The neo-colonialist goals of Superior Solutions are made apparent in three varyingly subtle ways. The first is its name, which implies Western and white supremacy. The second is its function as a private military capitalist enterprise which uses neoliberal discourse to justify its ability to profit from the geo-political instability created by colonialism. The third is its overt ambition to steal Africa's natural resources, through violence, for its own financial gain, while impoverishing and destabilising the region in the process.

Fig. 64. Ekaterina Gromova, head of Superior Solutions (Netflix 2020)

In addition, *Queen Sono* explores the repercussions of foreign neo-colonialism on the populace, in the actions of the Watu Wema Brigade, particularly through its anti-hero leader, Shandu. Shandu is Queen's love interest and former SOG member, whose motivations in joining Watu Wema include a disillusionment with inept government leaders whose stagnation maintains a status quo that allows them to benefit from Western capitalist exploitation of their country's national resources and the instability of post-apartheid South Africa. The Watu Wema are introduced in episode one, where they violently interrupt a diamond mining operation in the Democratic Republic of Congo. African workers are depicted undertaking hard labour as they are overseen by assault weaponcarrying private military guards who are commanded by a French-speaking white European man. The man bargains with Shandu, offering to give him diamonds in exchange for the Watu Wema's departure, to which Shandu replies, in French, "the diamonds are not yours to give", this leading to an altercation in which the man is subdued. Shandu then addresses the labourers, saying:

> Comrades, now you are free. Free to use the abundant riches of your land to help yourselves and your villages, instead of using the wealth meant for your children to enrich the rest of the world. We are the Watu Wema. We fight for Africa.

Following this, the Watu Wema lead a chant of "we are going to kill them for Congo, we are going to kill them for Africa", to the enthusiastic participation of the freed labourers. Shandu partners with Superior Solutions initially as a way to fund the group's activities. However, when other members of the Watu Wema agree to commit acts of terrorism – mistakenly believing that it will aid their goal of unseating immoral public officials – Shandu eventually leaves the group, unable to reconcile his knowledge of Superior Solutions' true intentions with his desire to rid Africa of neo-colonialism. Shandu's moral dilemma is part of *Queen Sono*'s recurring themes about the interconnectedness of Africa's economic exploitation and how to achieve justice within systems that exist to sustain injustice.

Fig. 65. The Watu Wema overlooking a diamond mine in Congo (Netflix 2020)

Queen finds herself in the same thematic predicament when she uncovers the conspiracy behind her mother's death. Safiya Sono (a character loosely based on Winnie Mandela) was assassinated by her friends, and Queen's trusted employers, the SOG, which had deemed the anti-apartheid freedom fighter to be too radical of an influence in the aftermath of Nelson Mandela's presidential win. The SOG, working in an unspecified degree with the CIA, ordered that murder be disguised as a White supremacist hate crime – a believable threat – in order to prioritize the stability of the new regime over the possibility of revolution. The inclusion of the CIA in the conspiracy to kill Safiya Sono was the first and only time that American politics impacted the programme's plot. This is noteworthy because the exclusion of American characters, references, or influences amplifies the focus on the African characters, references, and influences of the story. When America *is* directly included in the story, it is in reference to actions that have contributed to the crisis and to the show's theme of dismantling South Africa's economic dependency on the West. Upon learning the truth, Queen leaves the SOG, vowing to follow in her mother's footsteps and dismantle the internal corruption that has been poisoning her country. Similarly, Shandu finishes the season having decided to fight against Superior Solutions' influence in South Africa, with both his and Queen's plotlines setting the foundation for what would have been season two.

The programme's background, production, and debut occurred amidst the socio-political turmoil of the Trump presidency and increased media attention to the resurgence of authoritarian leadership and white supremacy in Western countries like the United States, The United Kingdom, and South Africa. In the latter country, the show was released in the wake of disgraced former president Jacob Zuma's 2018 resignation, a development that seemed to mirror the revelation that *Queen Sono*'s fictional president had been colluding with Superior Solutions (Fairbanks 2019). The narrative's unapologetic criticisms of the West, combined with its unflattering and truthful portrayals of African political elites and institutions, allow *Queen Sono* to feel as though it depicts a 'genuinely local' South African perspective.

Queen Sono's story thus represents the real-life socio-economic and socio-political marginalisation of Africa on the international stage, which is a deliberate choice that mirrors the cultural marginalisation of African-made creative products, including television programmes. In this context, *Queen Sono*'s explorations of the modern-day results of racial segregation, made by creators whose country and continent have been excluded from opportunities for international recognition because of the results of colonial capitalism, received positive media attention, which helped to strengthen Netflix's narrative that streaming can transcend international barriers. As Dunleavy notes, "the priority for Netflix is the allure of these dramas across this network's near-global array of territories" (13, 2020). To be clear, neither *Queen Sono*, nor Netflix's investment in foreign-language storytelling, are ground-breaking. Netflix is a capitalist enterprise first and foremost, and its desire and ability to platform African stories is not an altruistic or radical move. As Jenner writes, Netflix is "operating under the principles of American neoliberalism and transports these values through a variety of means (texts, marketing, etc), but it is also a vehicle for cultural exchange" (192, 2018). It is true that MENA and SSA content are being given unprecedented access to international audiences because of streaming platforms like Netflix. However, this chapter's exploration of these opportunities acknowledges the power imbalances that inform the rhetorical framing of non-Western commerce and content, without legitimizing a Western or neoliberalist 'saviour' framework.

5.6 *Stranger Things*: Localising Nostalgic Americana for International Viewers

5.6.1 Background and Plot

> What if Steven Spielberg directed a Stephen King book? – Matt and Ross Duffer (Sternbergh 2017)

The above line is the original elevator pitch for *Stranger Things*, Netflix's 2016 science-fiction serial drama smash hit. Set between 1983 and 1985, the story follows the residents of Hawkins, a fictional town in the American state of Indiana, as they uncover the mystery surrounding the disappearance of twelve-year-old Will Byers. As of 2020, there are three seasons (styled as *Stranger Things*, *Stranger Things 2*, and *Stranger Things 3*) with a fourth season confirmed, albeit without a release date due to the coronavirus outbreak (*Radio Times* 2020).

Stranger Things is the brainchild of writing duo Matt and Ross Duffer, known professionally as the Duffer Brothers. The pair are the show's executive producers and hold writing and directing credits throughout all three of its released seasons. The Duffer Brothers had previously been mentored by filmmaker M Night Shyamalan in his capacity as the executive producer of *Wayward Pines*, the Fox network's mystery-horror serial drama the brothers had written and produced. That professional experience fostered an interest in developing a missing-person mystery story, with both cinematic production quality and the creative and financial advantages of a premium cable or IDTV television network (Grow 2016).

Despite their involvement in *Wayward Pines,* and the support of 21 Laps Entertainment founder Shawn Levy, the Duffer Brothers had trouble shopping the project. They initially pitched it to fifteen networks, all of which declined to move forward with the concept on the basis that school-age characters could not be at the centre of a drama programme for adults, particularly one which would feature horror elements and violence (Cohen 2016). Shawn Levy describes the process of pitching to Netflix as revelatory within the realm of television development traditions, recalling that the company bought an entire season one day after hearing the pitch (Berkshire 2016). As Levy explains:

> They were the first pitch because they were our first choice. A big part of that is the Duffers are new and emerging filmmakers and they really didn't want the show to conform to increasingly obsolete notions of what is TV. They always spoke of it as an eight-hour movie. It's why they laid hands on every script. It's why we directed all of them ourselves. We wanted a continuity of authorship. And Netflix was our dream home because A) they genuinely empower creative, that's their rep and it's the truth, and B) we wanted people to have the option of watching a big chunk of episodes in a row without having to wait. (Levy cited in Berkshire, 2016)

Levy references Netflix's self-mythologizing narrative, affirming that its hands-off approach during the creative process and its delivery protocols allow for a 'futuristic' form of television, as opposed to the 'obsolete notions' that may influence content created for linear TV. Levy also claims that 'authorial continuity' is one of the reasons why *Stranger*

Things was so well-received, emphasising that because “the show is so singular in its voice, it just didn’t get messed with much” (quoted in Berkshire 2016). The executive producer credited Netflix’s much-publicised strategy of giving ‘creative freedom’ to its showrunners for allowing the Duffer Brothers to exercise a strict degree of creative control. Levy compares the process of working with ABC, a terrestrial network working in a “conventional way” by involving the ongoing input of multiple partners, to Netflix, which allowed *Stranger Things* to proceed, as Levy says, “without an outside studio and with such a small circle of approval or notes” (quoted in Berkshire 2016).

There are differences and similarities to Netflix’s approach with the Duffer Brothers and Lediga. Both Lediga and the Duffers credit Netflix with taking a ‘hands-off’ creative approach, but the intent behind this freedom differs between the showrunners. As discussed in Chapter Three, Netflix’s lack of interference with the Duffer Brothers’ vision is on-par with their laissez faire logic that good storytelling is best achieved without advertiser-influenced network meddling, something the company also publicises as a point of differentiation between itself and its advertiser-funded competitors. While this logic is applicable in Lediga’s case, Netflix’s lack of creative input in *Queen Sono* also preserves the programme’s ‘locality’ by allowing it to remain completely the product of its South African creators. The Duffer Brothers’ decision to collaborate with Netflix is framed around the streamer’s willingness to retain *Stranger Things*’ more distinctive narrative and generic elements because they complement the IDTV model. However, Lediga’s partnership with Netflix is framed less about creative freedom and more about having the opportunity and resources to create a high-end serial that will be distributed to a built-in international viewership base, reflecting the differing imperatives for creators in domestic and foreign markets.

5.6.2 The Nostalgia of *Stranger Things*

Stranger Things benefits from an international association between the cultural artifacts of 1980s America and 'Americana' as a representation of nationhood. Americana is simply defined as, "artworks featuring objects or imagery associated with the United States" (Silka, Perreira, Kordic, and Moriarty, 2016). More broadly:

> The quintessential of the U.S.A. culture and tradition is at the root of what we understand today to be Americana, and this phenomenon is not just referenced in the field of visual art, but we can find the term related to music, film, fashion, interior design, and an overall style of living (Silka et al 2016).

The international familiarity with Americana was due to the existence of "one-way traffic, mainly in entertainment-oriented programming, from the major Western exporting nations to the rest of the world" in the 1970s and 1980s (Thussu, 18, 2006). The Duffer Brothers' success in eliciting 1980s nostalgia was noted by critics and academics alike. In a profile for *Vulture*, Adam Stenbergh attributed *Stranger Things'* popularity to its evocation of the decade, achieved through unified production design, mise-en-scène, and characterisation.

> Beyond that, there was the feel of the show itself. *Stranger Things* certainly isn't a parody of resilient '80s pop culture like John Carpenter and Spielberg, and it's not even really an homage. It's more like a genetic recombination; less a show that's nostalgic *for* '80s pop culture than a show that is a nostalgic reimagining *of* '80s pop culture. The canny advance of *Stranger Things* lies in how it acknowledges the ways that, in the age of the internet, different eras collide, even as it recombines iconic sounds, images, and visual references to create a modernized version of a cultural experience that is all but lost (Stenbergh 2017).

Some television scholars have lent credence to popular reviews by agreeing that *Stranger Things* is effective in using the cultural and visual lexicon of its period setting to enhance its narrative complexity and character portrayals, particularly its engagement with 'nostalgia'. Stephans argues that nostalgic programmes allow audiences to "reinforce their selfnarrative and political agendas", which encourages them to "conceive of Netflix branding itself as positive, through evocation of the past" (2019, 26-37). Sirianni writes that *Stranger Things* provides opportunities for nostalgia at individual, collective, and simulated levels, which makes the show appealing to multiple audience segments (2019, 188). McCarthy posits that *Stranger Things* uses "consumerist convergence" to define itself as "geek metafiction" because its mise-en-scene and use of 1980s artifacts breeds an enthusiasm for the era that then creates a form of accessible nostalgia (2019, 664-671). Dunleavy sees *Stranger Things*' nostalgia as indebted to its "combining the aesthetics of 'realism' and 'postmodernism', pairing its references to earlier texts with painstaking verisimilitude to effect a celebration of the look, feel and popular culture of the 1980s, which brings the capacity to induce nostalgia" (2018, 146). As these assertions demonstrate, *Stranger Things*' success at evoking nostalgia for 1980s America within a 21st Century television context is an important part of its overall appeal.

5.6.3 Localising *Stranger Things*

Stranger Things' acting, writing, and production teams executed the Duffer Brothers' vision of intertextual 1980s nostalgia, whose cohesion is arguably one of the show's differentiating characteristics and partially responsible for its popularity. Translating this characteristic internationally was a necessary challenge that Netflix tackled in post-production. For example, with Winona Ryder in a lead role as Joyce Byers, the Netflix dubbing team responsible for *Stranger Things* sought to maintain continuity and authenticity by employing some of the same voice actors that had dubbed Ryder's voice in her previous film roles. The actors who dubbed Ryder's characters in French and Spanish for *Edward Scissorhands* (1990) and *Bram Stoker's Dracula* (1992) were hired to dub Joyce Byers in the same languages, while Byers' Italian dubbing was performed by the same voice actor who dubbed Ryder's voice in her 1988 breakthrough *Beetlejuice* (Rodriguez 2017). Netflix's Content Localisation Director Denny Sheehan explained that the company was, "trying to create dubs where if you close your eyes and switch between them you'd identify the same characters," hence the logic of sourcing voice actors "who embodied the spirit of those characters" in the instances of existing familiarity with the show's stars (quoted in Rodriguez 2017). The dubbed versions of *Stranger Things* performed well in certain markets, particularly Italy where 84 percent of its viewers watched the Italian dub, followed by Spain (79 percent) and France (70 percent) (Rodriguez 2017).

In addition to the voice acting, the translations of the words being spoken or subtitled were thoughtfully considered to accurately capture the cultural zeitgeist across linguistic and national borders. One method involved a research team locating foreign-language *Dungeons and Dragons* material from its original iterations in the 1970s and 1980s to ensure correct translations of the Demogorgon (Barrett 2017). Sheehan commented that this approach was about honouring the "specifics of the story… to make sure we are translating the same way that things were translated, say, 30 years ago" (quoted in Barrett 2017). Another was the creation of a "show bible" called the Key Names and Phrases tool (KNP) in to which the translators and vendors input local versions of location names, catchphrases, and science-fiction jargon, most of which do not have a foreign-language equivalent (Sheehan cited in Barrett 2017). Once compiled, the KNP is made available to all of dubbing studios and post-production vendors to ensure consistency.

Localised translations became especially important during the show's pivotal 'Christmas lights' sequence in Season One. Because the production of this first season so deliberately and meticulously relied on 'practical' (as distinct from digital) effects, it could not be re-shot or digitally re-edited for translation purposes. To overcome this hurdle, Sheehan's team needed to find contextually-correct translations that used the same numbers of letters in the twenty languages that Netflix operates in (Laporte 2017). Netflix was so pleased with its language localisation for *Stranger Things* that it released a YouTube video showing the audio seamlessly transitioning between twenty languages during a conversation between Dustin, Lucas, and Mike, as a demonstration of the company's view that "when language isn't a barrier, great stories have the power to travel the world" (YouTube/*Stranger Things*).

Perhaps aided by Netflix's micromanaged localisation strategies, *Stranger Things* became an international hit. In the first month of Season One's release, the show was watched in 190 countries, with Netflix reporting that *Stranger Things* had cultivated "devoted fans" in 70 of them (Barrett 2017). Although Netflix's viewing metrics are skewed in its own favour, independent metrics appear to validate the show's widespread popularity. Google reported that *Stranger Things* was the number one most-googled television programme globally in 2016 (beating HBO's *Game of Thrones* by three places) while a Parrot Analytics 'global TV demand study' found that the show "led all streaming series in demand" across ten primary markets of the U.K, the U.S, Canada, Mexico, Brazil, Spain, Germany, France, Japan, and Australia (Katz 2018).

Netflix's industrial localisation for *Stranger Things* exemplifies its 'hands off/hands on' strategy in another way. The company allows its showrunners some freedom to execute their programme in the writing, casting, shooting, and editing phases, but then retakes control over the completed creative product in order to apply its in-house post-production and localisation strategies. Sheehan explains this as using the showrunners' "creative intent as the North Star" on which they add the "culturally relevant and resonant" post-production enhancements that allow the show to have a "global appeal" (Sheehan quoted in Barrett 2017). Netflix's 'finishing touches' enable the finished show to 'travel' across its international markets but also ensures cultural and linguistic consistency between *Stranger Things* and other originals for subscribers in non-English language countries.

Netflix CEO Reed Hasting confirmed that the company intended for *Stranger Things* to become a flagship programme, describing it as the "kind of broad appeal, cross demographic, and cross-border sensation that we hope will distinguish Netflix original content" (Q3 Letter to Shareholders, 2016). Hastings also affirmed the programme's importance as original programming, calling *Stranger Things*, "notable as it is produced and owned by Netflix, which provides us with more attractive economics and greater business and creative control" (Q3 Letter to Shareholders, 2016). The level of attention paid to the dubbing and translation of *Stranger Things* reflects Netflix's strategy of internationalising its owned content through the localisation strategies discussed above, thus safeguarding the appeal of personalisation for foreign-language subscribers.

5.6.4 "Don't call them ads" – Brand Tie-Ins and the Marketability of *Stranger Things*

Stranger Things' affiliation with 1980s' Americana was the result of the Duffer Brothers' creative decision-making. However, its 'runaway' success made it a prime candidate for Netflix's experimentation with brand tie-ins, specifically because being associated with iconic U.S. consumer products makes *Stranger Things*' appear even more symbolically American (Thompson 2007). As Daya Thussu writes, "localised Americana is well represented by American brands" such as Coca Cola and Levi's, which became more internationally recognised as 'American' during the era of consumerist Reaganomics (20, 2006). Graham Thompson cites other examples of the companies that became synonymous with the United States during the 1980s era, arguing that "the elements of this hegemonic culture are the iconic brands of the American cultural landscape – Disney, Coca-Cola, McDonalds, Levi's, Nike" (154, 2007). *Stranger Things 3* makes visual reference to 100 brands in its episodes (Powers 2019). A report by Concave Brand Tracking estimated the value of the season's product placement to be $15 million, with Coca-Cola as the most visible brand overall, having been featured in every single episode (Powers 2019).

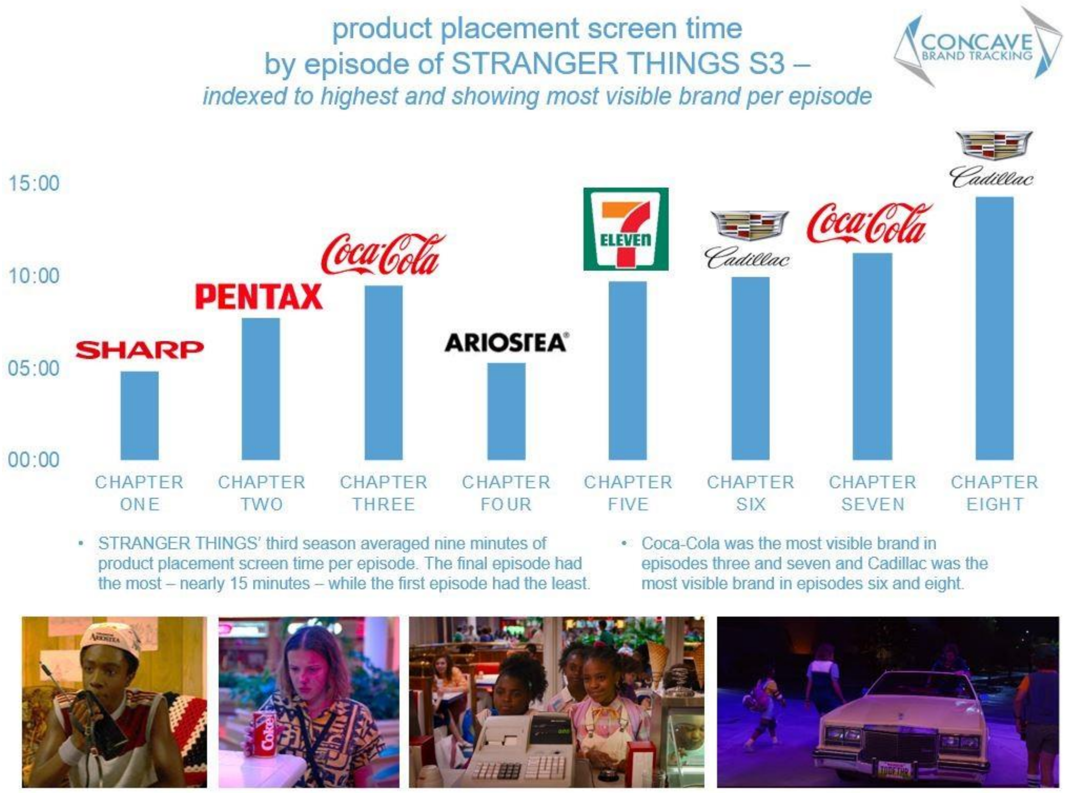

Fig. 66 (Concave Brand Tracking and American Marketing Association 2019)

Despite this product visibility, Netflix has denied receiving money from any of the companies whose products or logos were featured in *Stranger Things 3*, with a company spokesperson stating to *Vox* that nothing was “paid for or placed by third parties” and that the visible brands were “all part of the Duffer Brothers’ storytelling, which references consumer and popular culture” (Tiffany 2019). Although Netflix apparently made no profit from product placement in *Stranger Things*, its capacity for intertextual and referential viewer appeal provides the company with opportunities for other kinds of brand tie-ins.

Reed Hastings has thus far rebuked the notion that Netflix would ever incorporate advertisements on its platform or within its programmes. This view is consistent with the logic of Netflix’s streaming model, which is characterised by a rejection of interruptions and a focused attempt to consolidate the Netflix brand across all of the programming that appears in its catalogue, regardless of the programming’s original network. Additionally, Netflix’s lack of advertisements differentiates it from the ad-supported video on demand services (AVOD), such as the catch-up online platforms of broadcast and cable networks that now populate the IDTV space. While it is highly unlikely for the streamer to stray from its ‘no ads’ policy, *Stranger Things* follows in the footsteps of earlier originals (like *Daredevil* and *Luke Cage*) in presenting an opportunity to capitalise on brand partnerships. Unlike its Marvel series, which was a co-production with Disney, *Stranger Things* is an intellectual property that is primarily owned by Netflix, allowing it to trial secondary-revenue streams through alternative forms of advertising which extend beyond the boundaries of the narrative and the portal (Lynch 2017)[2].

Examples of these ‘non-advertising’ promotions have existed since the first season. After Eggos, a Kellogg-owned waffle brand, was prominently featured as the character Eleven’s favourite food, Kellogg collaborated with Netflix for season two, rolling out Eggo recipes that corresponded to each of the season’s episodes, as well as a Google Chrome extension that blocked spoilers for the programme (Wohl 2017). A Kellogg spokesperson reinforced

[2] In 2017, Netflix’s Director and Senior Counsel of Content and Brand Intellectual Property (IP) sent a cease and desist letter to the proprietors of a *Stranger Things*-themed bar for unauthorized use of their company’s IP, indicating that Netflix is at least one of the parties that owns and profits from *Stranger Things*.

that Netflix does not seek paid product placement, saying that "Netflix doesn't offer any paid placements" and that "Eggo's presence in *Stranger Things* was a happy surprise for the brand" and their partnership is "promotional only", noting that "all product featured in the show is organic" (quoted in Beer 2017, Wohl 2017).

Fig. 67. "Can't binge #StrangerThings? No prob. Our spoiler blocker will help you avoid spoilers like this clip from Season 2 http://bit.ly/2f81OoM" (Twitter.com/eggo)

The emphasis on the 'organic' nature of *Stranger Things*' product placement is meant to reassure viewers and consumers that the array of well-known brands featured in the show's plot lines are not an opportunistic cash-grab but rather the fortuitous side-effect of the show's evocation of Americana. The concept of 'organic' incorporation was present in *Stranger Things*' relationship with Coca-Cola. Season three was set in 1985, which was the release of the infamously unsuccessful 'New Coke' campaign, during which the soda company debuted a new formula for the first time in 99 years (Locker 2019). In order to avoid an anachronism, the showrunners intended to include 'New Coke' into its pop design. Coca-Cola had previously provided *Stranger Things* with era-appropriate packaging and signage for its first two seasons, leading Netflix to contact the company about potentially re-launching 'New Coke' to coincide with the release of season 3 (Beer 2019). Coca-Cola's Senior Vice-President of Strategic Marketing, Geoff Cottrill, said the company had been attempting to find pathways in to "non-advertising platforms like Netflix in unobtrusive but creative ways" (quoted in Beer 2019). Cottrill explained that Coca-Cola had proceeded with the 'New Coke' opportunity because the product had been "written into the third season in a fairly meaningful way", which aligned with their remit to find "a way to integrate organically and authentically" (quoted in Beer 2019). *Stranger Things* was thus able to incorporate New Coke products into its season and the show received free promotion in the form of logo-emblazoned Coca-Cola machines that dispensed New Coke cans, for free, throughout America, during the release of Season 3 (Beer 2019). In addition, the Duffer Brothers directed an advertisement for New Coke set in the *Stranger Things* universe, starring main characters Eleven, Mike, Steve, and Dustin in a 'TV spot' style-commercial with deliberate 1980s grain placed over the film (Poggi 2019).

Fig. 68. An example of the New Coke machines, decorated to look as though they were in the show's Upside Down (*Fast Company*, 2019)

Both Coca-Cola and Netflix were adamant that the 'New Coke' project was a quid-pro-quo situation with no money exchange which arose as a "natural extension of how the brand was being portrayed anyway", according to Coca-Cola's Geoff Cottrill (quoted in Beer 2019). The clothing company Levi's also provided period-appropriate clothing and archival designs for use on the third season, citing the prevalence of its branded clothing in the 1980s era (*Levi Strauss* 2019). This collaboration resulted in the creation of a Levi's *Stranger Things* capsule collection, available to buy online, which used the programme's logos and had a commercial shot on-location at the Starcourt Mall set (*Levi Strauss* 2019). Levi's also worked with *Stranger Things*' own costume designers to co-create some of the clothing items worn by the characters of Dustin and Eleven (Brain 2019). In a promotional statement, Levi's stated that their partnership with Netflix "made perfect sense" because of their joint commitment to the "authenticity" of *Stranger Things*' 1980s aesthetic (Levi Strauss 2019).

The *Stranger Things* example is notable because it was Netflix's most significant opportunity to engage with advertising/marketing partnerships that centred on one of its original programmes, enabling it to appropriate a well-established broadcast and cable television strategy for its own purposes, albeit to limited success. It is important to recognise that brand tie-ins are unlikely to be a source of revenue for Netflix, whose expenditure on high-end serial dramas is in the millions-per-episode. Its primary goal with these types of 'non-advertisement' advertisements are likely the cost-saving benefits they provide for production budgets and free promotion for its original programmes, and by extension, the Netflix brand.

As the streamer does not itself use conventional marketing avenues (such as billboards) cross-promotion with existing brands, which have large advertising budgets and a wide reach, can publicise a flagship original like *Stranger Things* to a greater variety of consumers, in a greater number of markets. In turn, these consumers may then become subscribers or have the value of their subscription affirmed through Netflix's saturation in the public consciousness, thus maintaining or increasing the streamer's primary revenue stream. Hastings confirmed as much in the July 2019 Shareholder Letter, writing that their marketing partnerships are geared towards "optimizing for fan and viewer engagement over revenue maximization" (Netflix 2019). Hastings cited *Stranger Things* specifically, noting that "for the launch of season 3, we partnered with best-in-class brands like Coke, Nike, Burger King, and Baskin Robbins to build deep connections with our fans", emphasising that the company believes that investing in "viewer satisfaction" is the most constructive future-proofing model (Netflix 2019).

In these statements, Hastings reifies the narrative of brand integrity and the prioritization and protection of original productions, as a means of reassuring shareholders that any cross-marketing in its programmes will remain 'authentic' to the storytelling. *Stranger Things 3*'s branding opportunities appear to have proven successful enough for Netflix to expand its Consumer Products team in 2020 (*Netflix* 2020). The team oversees the creation and licensing of consumer goods, services, and experiences related to Netflix-owned original properties. As stated in Netflix's official description, affiliated consumer products will "promote title awareness while enabling our IPs to become part of the zeitgeist in the buzziest way possible" (Gruenwedel 2020). Netflix's expansion of the team was publicised, leading to media speculation that the streamer plans to utilise future original programmes as brand promotion tools (Rodriguez 2020). Importantly, it demonstrates that the IDTVP is aware of *Stranger Things*' role as a vehicle for 1980s Americana and is taking deliberate action to amplify public associations of the show with American cultural products such as Levi's, Coca Cola, and Cadillac.

Advertising in the television industry looks likely to remain in the realm of broadcast and basic cable networks for the foreseeable future, which continue to rely on advertiser funding and provide a more lucrative source of investment for advertisers than subscription-based services. Additionally, linear networks are able to leverage third-party viewing figures (like Nielsen ratings) to secure more favourable rates from advertisers (Schiff 2019). However, Netflix's strategy demonstrates a potential advantage for *other* subscription-reliant IDTV competitors. Hulu has been integrating paid product placement (PPPs) since 2016, integrating them in to 91 percent of its original programmes, whereas Amazon Prime has used PPPs across all of its original content (Moore 2016, Tran 2018). Disney + has not included PPPs but, as a leading global conglomerate, has drawn on its longstanding relationships in the industry to secure alternative deals, such as licensing exclusive Disney + content to Delta Airlines and partnering with Kellogg cereal to provide buyers with a free two-week trial (Weissbrot 2020). All three competitors have demonstrated a willingness to work with advertising agencies in order to solicit interested brand partners (Peterson 2019). In contrast, Netflix eschews advertising agencies almost entirely and prefers to contact potential partners directly, an approach which contravenes existing protocols between television networks, advertising agencies, and companies (Schiff 2019, Newman 2019). According to agency veteran Noah Mallin, who facilitated a rare exchange on Netflix's behalf, it is "unlikely to find anyone on the agency side who's involved in one of these deals, because that's not how Netflix likes to work", adding that the company "made it very clear that once a connection is made, they take over the conversation" (Mallin cited in Schiff 2019). Netflix's guardianship of its intellectual property (its original programmes, notably high-end serial dramas) works to its benefit since its business relies on its ability to operate outside of the funding and advertising systems that exist because of linear television. Its competitors have the option of utilising more of the available strategies within these systems, providing them the opportunity to make a larger percentage of profit within that revenue stream. *Stranger Things*' marketability demonstrates Netflix's willingness to use its US-produced originals to promote the Netflix brand internationally through commercial avenues that frame its content as 'American-made' and not 'prestigious' in the way that a PCN like HBO might with its own original content.

Furthermore, the addition of blatant branding amplifies *Stranger Things*' appeal as an American cultural product. In promoting a flagship original with in-universe (the plot and mise-en-scene) and external (branded products) connections to capitalist symbols of American culture, *Stranger Things* also promotes the Netflix brand internationally. In this way, *Stranger Things* is the result of the same localisation strategies that Netflix uses for its foreign-language markets. It was written as a "love letter" to some of the most iconic 1980s American media, by up-and-coming creators, who intended the programme to represent their experiences of growing up in the United States during that time (Torn 2020). The reasons for *Stranger Things*' domestic success and status as a cultural juggernaut also apply to its international success, due to the cultural hegemony of the American media products that the programme references.

Viewing figures gathered from independent sources and Netflix itself suggest that *Stranger Things* attracted high levels of viewership in comparison to other Netflix originals as well as original commissions from IDTV competitors like Hulu and Amazon Prime Video. Season one became the third most-watched Netflix original of 2016, averaging 14 million viewers in its first month on the platform, according to a report by Symphony Advanced Media (Holloway 2016). In 2018, Parrot Analytics debuted a new metric it termed 'demand expressions' which measures the popularity of IDTVP-originated programmes, excluding shows originated for cable or broadcast networks. Although demand expressions do not provide viewing figures, they take in to account the breadth and frequency with which users engage with, or reference, a show online, through social media, streaming, Google searches, and in research (Parrot Analytics 2020). When compiled, demand expressions provide a way to measure and compare the overall attention towards and popularity of IDTV-originated programmes. In 2018, Parrot Analytics released a list of the top ten most popular “digital originals” according to demand expressions. It found that *Stranger Things* was the most popular of IDTV original TV dramas, even months after the 2017 release of its second season (Parrot Analytics 2018, Schneider 2018). *Stranger Things* led demand expressions in over 100 markets, barring Australia, where the show came in second to *13 Reasons Why*, another Netflix original (Katz 2018).

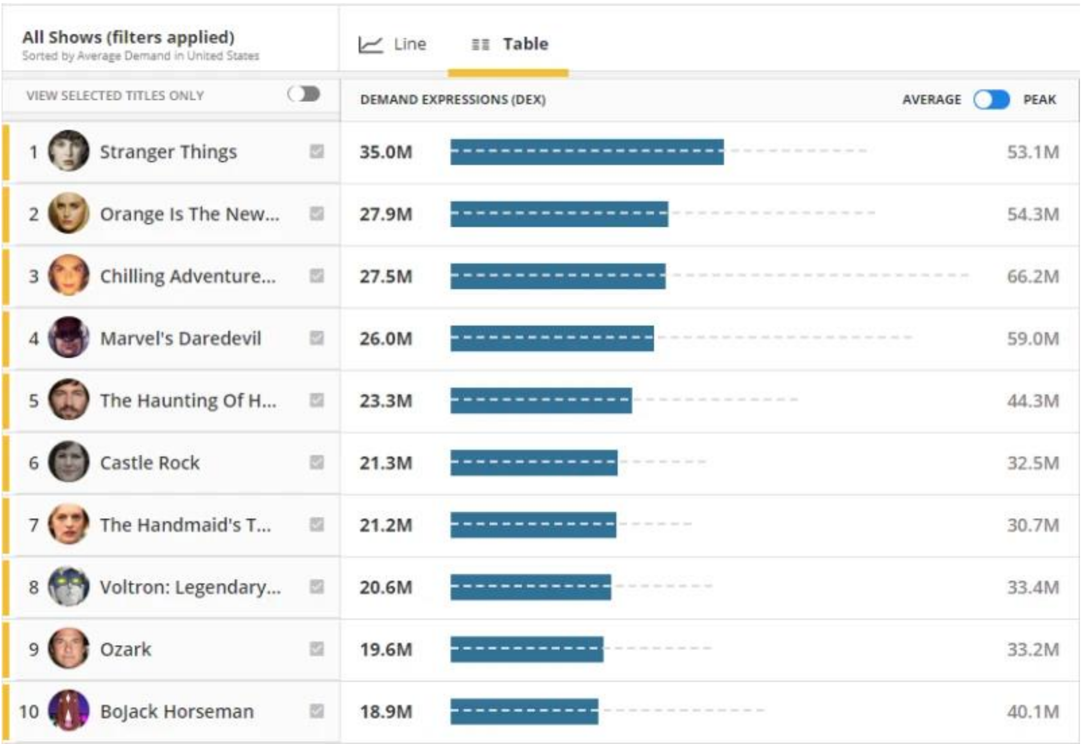

Fig. 69. Demand Expressions (Aug. 10 – Nov. 7, 2018) (Parrot Analytics)

While Netflix refuses to validate external measurement methods, by its own viewing metrics, *Stranger Things 3* broke records. The company announced that the third season had been viewed over 40 million times internationally in the five days after its release, with 18 million global households finishing the series within that time (Mumford 2019). Accounting for Netflix’s generous metrics, these figures made *Stranger Things 3* the most viewed piece of original content (within five days of its release) in Netflix history (Mumford 2019).

Over a year and a half after the release of the third season, *Stranger Things'* ambassadorship for nostalgic Americana continues to be reputationally important for Netflix. In September 2020, *Stranger Things* was the first programme featured in the company's advertisement campaign, 'One Story Away', aimed at highlighting the transcendental power of storytelling across linguistic and national borders (Pallotta 2020). This "focus on perceived commonalities rather than differences" is an aspect of what Jenner identifies to be Netflix's "grammar of transnationalism" which describes the IDTVP's capacity to simultaneously occupy national and transnational spaces (226, 2018). The advertising campaigns in which Netflix has allowed *Stranger Things* to participate, and its uses of the programme in promoting itself as a transnational network, speak to Jenner's concept of this form of 'grammar'. Despite invoking general humanist concepts of diversity, multiculturalism, and gender equality in its self-mythologising, Netflix's actions reveal an awareness that *Stranger Things*' characteristic American-ness adds to its transnational allure because of the "assumed 'universality' [of] Western cultural value systems" that characterise English-language media (Jenner, 2018, 226).

This case study does not wish to suggest that *Stranger Things* is successful because of nostalgia, merely that its popularity reflects a worldwide awareness of American cultural products, and that Netflix has used post-production localisation and brand tie-ins to promote *Stranger Things* as a 'local' American original for domestic and international subscribers alike. Additionally, Netflix's focus on local language accuracy and voice actor continuity reflects an intention to make the programme accessible to foreign viewers. In accentuating *Stranger Things*' association with Americana through in-text and real-world branding, Netflix shows an intent to localise the programme as an American product even more acutely for non-English language subscribers.

5.7 Conclusion

Localisation, a complex term with multiple meanings across many academic disciplines, is sometimes used to denote ‘authenticity’, particularly in mainstream media discourse. It is impossible to define what kinds of content and representations can accurately be deemed as ‘authentic’ to a nation or culture, and such assertions are inherently problematic. Instead, this chapter has used definitions of locality that relate to television studies, and specifically to Netflix’s rhetorical framing of localisation insofar as it relates to the company’s drama commissioning strategies. After the high viewing figures for *La Casa De Papel* amongst non-Spanish-speaking subscribers, Netflix planted roots in the country by not only committing to more Spanish language originals but establishing production facilities in Madrid, and other foreign-language territories. The company is vocal about its investments in the creative sectors of markets like MENA and Africa and has prioritised – at least publicly – its intention to spotlight local creatives in these regions. The resulting content, like *The Protector* and *Paranormal*, show localised intentions in their subject matter (Turkish folklore set in the capital city) local familiarity (a popular book series) and in being written, filmed, starring, and produced by local cast and crews. *Queen Sono* is at once a South African story, with a narrative rooted in post-apartheid conflict, but incorporates the breadth of the African continent in its multi-country shooting locations and variety of languages. As a programme which was hugely successful with domestic subscribers, *Stranger Things* might appear an odd choice for discussion in this chapter. However, the distinctive, consistent, and purposeful use of 1980s Americana over its three seasons has helped to make the show internationally recognisable as an American cultural product. Netflix’s subsequent focus on using industrial localisation strategies to extend *Stranger Things*’ accessibility for foreign-language subscribers provides a parallel to the company’s attempts to localise *Queen Sono*. Although Netflix’s ‘success’ in this regard cannot be measured, its actions reflect the company’s growing focus towards creating content for an international subscriber base and in establishing longer term relationships with producers in foreign markets, in hopes of living up to its self-styled reputation as a ‘global network’.

Conclusion: Netflix is the New Black

At Netflix, we want to entertain the world. Whatever your taste, and no matter where you live, we give you access to best-in-class TV shows, movies and documentaries. Our members control what they want to watch, when they want it, with no ads, in one simple subscription. We're streaming in more than 30 languages and 190 countries, because great stories can come from anywhere and be loved everywhere. We are the world's biggest fans of entertainment, and we're always looking to help you find your next favorite story.

("About Netflix", *Netflix*, 2021)

6.1 The Beginning of the End

It is difficult, to say the least, to discuss the entirety of Netflix's impact on the television industry, particularly when taking into account the scope of its multinational activities. The streamer's enormous sphere of influence informed this thesis' research questions, which asked which of Netflix's technological factors and industrial decisions resulted in the company becoming the world's leading internationally-operating IDTVP. Chapters One and Two have addressed the technological research questions posed by this thesis. Both chapters provide key findings about the normalisation of Netflix's digital strategies and the features which contribute to the Netflix interface and influence the consumption and delivery of content on its portal. Chapters Three and Four take an industrial focus, examining the ways in which Netflix increased its domestic subscriber base and began to commission English-language original programming before venturing into non-US territories. These chapters offer in-depth investigations into the streamer's increasing presence in the production and commissioning sectors of non-US screen industries. Chapter Five examines the outcomes of Netflix's domestic and international commissioning strategies and interrogates the reputational, commercial, and industrial decisions that led to the commissioning and marketing of *Stranger Things* and *Queen Sono*. The discursive creation of 'the Netflix experience' has been investigated as a central theme throughout this thesis. The thesis demonstrates how this idea originated as a differentiating concept for the personalisation and recommendation capabilities of Netflix's interface, but was then was expanded to include the company's 'internationally local' commissioning strategy.

In 2016, upon the international rollout of Netflix's service (and one year before work began on this research) Reed Hastings proclaimed that the world was "witnessing the birth of a global TV network" (Hastings cited in Cook, 2016). In 2021, the company prefers to define itself as "the world's biggest fans of entertainment", a vague yet flexible descriptor that exemplifies Netflix's ability to oscillate between its various roles as a content originator, a catalogue provider, a convenient streaming platform, and a cultural talking point. Netflix's 2021 'About' statement shows the streamer's aptitude at *marketing its ability* to balance the streamer's seemingly competing audience objectives of personalisation and aggregation, and its aims to combine and reconcile local specificity with international appeal.

This thesis has examined some key strategies within Netflix's international focus, these demonstrating how and why Netflix has transcended its earlier status as an American streaming success to become a leading multinational streaming network with a growing list of non-US Netflix-commissioned programmes, content in 30 languages, and over 200 million subscribers worldwide. The thesis has identified and interrogated the facets of Netflix's IDTV model that have been pivotal to its successes, challenges, and influence, these elements having been researched through a period of ongoing, significant change. Netflix has arrived at the point of its trajectory in which, as Lotz characterises it, it is "a zebra among horses" (205, 2021). This thesis has investigated Netflix's trajectory by examining the rhetorical, technological, and industrial strategies that have helped this company to become closely associated with the phenomenon of internet-distributed television itself.

6.2 Objectives and Contributions

When research for this thesis began in 2017, Netflix had not yet become the international mainstay it is in 2021. There was scepticism surrounding the company and its aim to become a 'global network', and with only a small proportion of the original programmes it now has, Netflix's reputation as a competitive content commissioner was still unproven. Despite the uncertainty, there remained a great deal of anticipation and excitement about IDTV's obvious potential among consumers, industry professionals, and academics, excitement which was not matched by the abundance of IDTV research that exists today. This thesis has thus built on the early foundations laid by scholars such as Amanda Lotz. It has aimed to produce IDTV-specific scholarship that captures not only the details of the changes that occurred in the first five-ten years of IDTV, but to also reflect upon the astonishingly rapid pace with which the television industry has adapted to internet distribution. Keeping abreast of the volume and range of changes that have occurred, these also altering the initial hypotheses posited during the research phase of this work, has been challenging. The swiftness with which Netflix, as simply one (albeit large) industry player, has developed its domestic and international operations reflects the changing circumstances of many leading networks operating in today's television landscape, particularly those based in the United States. This thesis has recognised Netflix's propensity to exemplify the mainstream appeal of IDTV and examined its strategies for the popularisation and, ultimately, for the normalisation of this distribution technology during the same period in which Netflix has attained a near-global presence.

Technological strategies have been fundamental to Netflix's success and Chapter One provides a compelling argument as to the necessity that these be closely examined. As explained in this chapter, Netflix's key strength was not simply its *deployment* of software and algorithms for its innovative interface design, but its ability to *frame* these elements as innovations that could differentiate the company from other networks and add value to its services during a period in which Netflix had little to no original content. In order to establish and investigate this framing, Chapter One explored the company's use of software and algorithms, and explained the significance of its near-global cloud architecture. Together, these features have facilitated the internet distribution infrastructure that has enabled Netflix's international expansion and allowed it to begin commissioning foreign-language programmes. Netflix uses its Tech Blog and Media Centre to disseminate a narrative which positions the consumption of content on its platform as 'an experience' made 'unique' by the supposed level of control afforded to the user, whilst maintaining an interface that needs to remain cohesive and readable, regardless of whatever language it is being viewed in, in order to provide the same 'experience' for users in 190 countries.

Chapter Two investigates how the Netflix experience is used to differentiate the streamer from competitors for the purposes of making negative comparisons as difficult as possible. The streamer pursues the goal of individuation by wielding its technological apparatus, which Netflix deploys to build its own mythos as a unique entity whose failures cannot be accurately measured nor compared against any other competitor, but whose successes can only be quantified by Netflix itself, without third-party validation.

The chapter also discusses the apparent failures of Netflix's suggestion algorithms, using several of the company's controversial programme cancellations and seemingly racially-motivated subscriber suggestions as exemplars. In doing this, the chapter challenges Netflix's argument that its effective recommendation system allows creatively risky programming to find suitable audiences and exposes a weakness in one of the streamer's points of differentiation.

With Netflix's technological strategies established and interrogated, Chapter Three examines the company's industrial manoeuvres within its domestic market of the United States. The chapter explains the processes through which Netflix has exploited regulatory loopholes and built important relationships with B/C/S networks in order to acquire and (subsequently) co-produce content and investigates how these decisions convinced Netflix to direct its resources towards commissioning its own programmes, leading to the 'mega deals' strategy and a stronger focus on mythologizing Netflix as a progressive and creator-focused network. Having the previously-discussed digital channels at its disposal, the chapter reveals how Netflix has deployed false dichotomies between itself as an 'innovator' and B/C/S networks as 'legacy incumbents' to create an inflated sense of differentiation between its commissioning practices and those of its competitors.

Had Netflix's activities been limited to North America, its significance in the annals of television (and its inclusion in this thesis) would be greatly minimised. The streamer's dynamism, along with its domestic revenues, growing cultural legitimacy, and international digital infrastructure, have propelled its establishment of services in all but four countries in the world. Chapter Four explores this dynamism. It identifies the importance of Netflix's adaptability and demonstrates the ways in which the streamer's IDTV model enabled it to gain ground in countries with disparate barriers to entry, such as regulatory hindrances, weak or unequal internet availability, and strong competition from local networks.

The chapter identifies and explains the development of Netflix's 'hyperlocal' approach, an aspect of its 'internationally local' strategy, paying particular attention to its application in the MENA and SSA regions. The chapter challenges Netflix's self-mythologising as a televisual novelty and uplifter of marginalised MENA stories by comparing the company's 'hyperlocal' strategies with those of local IDTVPs whose presence predated the American streamer.

SSA and MENA are two areas which have historically been underrepresented in television scholarship and underestimated as a site of IDTV creation. When Netflix made Africa the next focus of its attention, it brought possibilities for unprecedented international viewership and the potential of more investment into African creativity for high-end television. These possibilities are inevitably attended by the possible problems of American cultural imperialism and corporate neoliberal 'White saviourism'. Chapter Five has thus grappled with the implications of Netflix's ability to commission and then distribute foreign-language programmes across its near-global array of markets. Using *Stranger Things* and *Queen Sono* as examples of Netflix's 'internationally local' intentions, this chapter explains how each programme represented the company's commissioning goals and served to extend Netflix's branding through a combination of cultural exchange and cultural specificity, both of these filtered through the lens of profit-driven neoliberal Western hegemony.

Chapter Five explores the aftermath of Netflix's international expansion and the likelihood of Netflix's international entrenchment. Although the outcomes of the company's creeping power are as yet unknown, as Chapter Five demonstrates, Netflix understands what it is doing. It comprehends the effectiveness of its 'internationally local' strategies and has been dedicated in its pursuit of creative partnerships and industrial resources, supported by an international array of local Netflix executives and post-production specialists.

Taken together, Netflix's efforts technologically, strategically, and industrially, reflect its robust future planning. These efforts continue to reap benefits as its subscribers increase and its programmes achieve increased international audience exposure. As a research project undertaken in tandem with the initial explosion of interest surrounding IDTV, this thesis has demonstrated the importance of Netflix's function (and reputation) as a software company which has achieved the perceived 'gold standard' of IDTV interface designs, thanks to the company's consistent messaging about the 'Netflix experience', to the personalisation and recommendation capabilities of its algorithms, and to its attention to the localisation, accessibility and aesthetic coherence of its platform across the varying languages and bandwidth restrictions of 190 countries. In addition to discussing many characteristics of the streamer's internet delivery methods, this research has helped to fill a gap in scholarship about Netflix's self-aware company messaging and the unusually all-embracing brand identity that allows it to deliver a seemingly personalized menu to an unprecedented volume and multi-national diversity of subscribers.

Having investigated the concept and function of the Netflix experience, this thesis also examines the streamer's international approach. It reveals how the company bypassed regulatory hurdles and pressed its technical advantages to more easily overcome barriers to entry and ingratiate itself into different kinds of television markets, first as a content provider, and then as a content commissioner. As this thesis has shown, its digital responsiveness has been key to Netflix's ability to travel outside of the United States, leading to an international presence that gave the streamer the legitimacy (and resources) to evolve itself from a purveyor of catalogue convenience to the IDTVP against which all others are measured. The thesis has demonstrated that a mixture of early opportunism, digital expertise, industrial appropriation, and pervasive self-mythologising have together enabled Netflix to become a television mainstay whose cultural impact has far exceeded the millennial slang term of "Netflix and chill".

6.3 Limitations and Recommendations for Further Research

This thesis has focused specifically on Netflix, which (as of 2021) is one of the many IDTVPs operating internationally. The company's closest competitors are those which rival its international subscriber reach and its near-global availability, such as Disney + and Amazon Prime Video. This wider context raises questions about the existing intellectual properties, income streams, and brand identities of these companies, as well as their roles as American-based entities which also operate in a multiplicity of non-US markets. Research that provides comparative analysis into this larger groups of IDTVPs is now warranted. One line of inquiry is that of how their strategies relate to Netflix's. Moreover, a thorough interrogation of other IDTVPs, particularly within limited market contexts, would provide more detailed comparisons between specific aspects of IDTVP business models, which also co-exist with broadcast and cable/satellite platforms and services.

Using other critical ideologies, such as feminism and post-colonialism, would allow for a cultural appraisal of Netflix's approaches and its role in the political economy of multiple media industries. While this thesis acknowledges some examples of Netflix's problematic, potentially tokenistic, use of minority creators as part of the company's content and marketing strategies, it has not engaged with the issue of hegemonic exploitation from the perspectives of post-colonialism and post-structuralism. Future academic work that critiques Netflix and its programming from these perspectives would add important context as to the company's cultural impacts.

Compounding the issue of hegemonic perspectives is that this research was undertaken with a predominant focus on Netflix's activities in the United States. Although the US is Netflix's domestic market and has a significant international impact, it remains a widely-studied region within television scholarship, leaving room for more research about Netflix's operations in specific countries as well as area-specific local IDTVPs.

Similarly, Chapter Five has provided selected country case studies, these chosen to highlight the variance of challenges faced by Netflix in its international expansion. Because of this variety, the thesis did not have the scope to conduct in-depth examinations of Netflix's singular impact on the industries of individual nations, especially considering the difficulties of defining the experience of creating, consuming, and studying television in any given national context (Lotz and Lobato 2020). There is a significant amount of difficulty in contextualising Netflix on a 'global' level. As noted by Lobato and Lotz, there are "empirical and conceptual challenges related to the general problem of how to study a video service that is experienced differently in each country" (2020, 132). To date there are several publications that specifically address Netflix as a global operator and many scholars that have undertaken research on Netflix's effect on the television industry of a particular country. An example of such research is the Global Internet Television Consortium (GITC). Initially founded by Lotz and Lobato, the GITC has operated since 2016 and routinely produces academic material about the international activities of Netflix, and more recently other IDTVPs like Hulu, supplied by screen scholars from across the world (GITC 2021). The consortium model allows for ongoing, comparative research about the ways in which various national industries and regulatory bodies are responding to the presence and continuing expansion of IDTVPs.

6.4 Final Remarks

The average Netflix consumer may associate the company with any number of the headline-making antics discussed in earlier chapters. From the perspective of this thesis, however, Netflix's grand accomplishment is neither its hit-or-miss original programmes nor its promise of a culturally representative, algorithmic utopia. Netflix's enduring impact is in its ubiquity. That the streamer is as equally relevant for its victories as for its failures and is as regularly ridiculed and doubted as it is commended and applauded, is a testament to the success of its flexible brand identity. This thesis has revealed this identity to be contradictory, ambiguous, simultaneously all-encompassing yet indistinct, and also indebted to whichever aspect of the Netflix experience is deemed most important to its individual subscribers.

As a preeminent cultural force, the words 'streaming television' and 'binge-watching' are now permanently associated with Netflix. Children born after 2010 will recognise Netflix and its contemporaries as a familiar and assumed part of their entertainment landscape. They will likely be unaware of either the continuing mass shift of viewers towards internet-distributed television (which Netflix helped to initiate) or the rapid pace of change that is occurring as networks of all types, across the world, increase their own use of IDTV platforms. Future consumers of Netflix may even misattribute IDTV's incentivising forces of digital convergence, internet connectivity, and globalisation, to the company, while underestimating the importance of existing B/C/S networks and their own original programming to the increasing take-up of IDTV. While Netflix is highly adept at accepting credit it does not deserve, as well as making grand claims that lack sufficient evidence, the company has proven itself in several important ways. Netflix has managed to achieve near-global availability without a substantial back-catalogue of commissioned and exclusive content. The company accomplished this because of its early investment in its delivery model, notably in the internet architecture and cloud infrastructure that allow its video streaming in 190 countries and in the algorithmic processes and interface designs that enable its user-friendly portal. Having unlocked the barriers into so many different territories, Netflix grew its market presence and penetration in each one. It expanded its stable of original programmes, a proportion of which it sourced from non-US territories, by partnering with local creators to create new shows (a proportion of which used non-English languages). This non-US commissioning was facilitated partly by the rapidity with which Netflix acquired administration offices and production studios outside of the United States.

With the technical and industrial groundwork laid for ‘streamlined streaming’, Netflix supported its international operation by establishing a ‘Netflix standard’ for interface design localisation and content subtitling and dubbing, utilising its international network of affiliated post-production vendors to carry out this work. Netflix also maximised its communication channels to continuously enforce the omnipresence of the Netflix brand. The press outlet of the Netflix Media Centre promoted the company’s ‘internationally local’ commissioning initiatives and championed its ‘progressive platforming’ of underrepresented stories. The Netflix Tech Blog, aimed at software industry professionals and enthusiasts, explained, and extolled the virtues of, the inner workings of Netflix’s technologies. Netflix’s social media accounts circulate flattering self-measured viewership numbers and post humorous content that encourages user engagement and consequently, keeps Netflix culturally relevant for viewers, industry experts, and scholars. The effect of these outlets on providing narratives that normalise Netflix has been methodically examined in this thesis, which will hopefully serve as a useful piece of scholarship for academics who want to understand Netflix’s rise to prominence.

Across this thesis, Netflix is shown to be hugely significant as both an object of study and as an IDTV and SVOD pioneer. Netflix has established benchmarks for success for newer multinational IDTVPs, and its push towards the commissioning and/or coproduction of non-English language programmes is encouraging an industry-wide movement in the direction of non-English language content. This is an incredibly exciting recent development and just one example of the new opportunities that have been enabled by the normalisation of IDTV.

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