Global Netflix
New and old questions for media globalization debates

Ramon Lobato
Senior Research Fellow
School of Media and Communication
RMIT University, Melbourne
how Netflix has changed international television distribution

theories and concepts needed to make sense of these changes

Open access version:
http://opensquare.nyupress.org
Two tricky questions:

Is Netflix a platform?

How do we evaluate Netflix’s diversity/homogeneity?
1. Is Netflix a platform?

Ways to define ‘platform’: 

1. a reprogrammable system (*software definition*)
2. a multisided marketplace (*economic definition*)
3. an algorithmically curated interface (*user experience definition*)
4. stand-in for “tech company”
5. that which calls itself a platform
6. bad object
Netflix is

not reprogrammable

not a multisided marketplace

not open-upload (c.f. YouTube)

*but* ...

typifies (has helped to define?) modes of interactivity now associated with platforms – especially *algorithmic recommendation*

is bound up with some (but not all) of the same policy debates as Facebook, YouTube, etc
One platform or many?

Vectors of difference in a multi-territory SVOD:

- Catalog (size)
- Catalog (composition)
- Availability of original productions
- Licensing norms
- Investment in local production
- Local advertising
- Commitment to local market

*Netflix: singular global platform, or collection of national media services?*
Question 2.

How do we evaluate Netflix’s diversity/homogeneity?
Irreconcilable truths?
Insights from SVOD catalog research

The average Netflix catalog in EU contains content from more than 60 different countries…

Source: European Audiovisual Observatory
Irreconcilable truths?
Insights from SVOD catalog research

The average Netflix catalog in EU contains content from more than 60 different countries…

…but half this content is from the United States.

Source: European Audiovisual Observatory
Source: European Audiovisual Observatory
Local content within Netflix catalogs

<table>
<thead>
<tr>
<th>Year</th>
<th>EU28</th>
<th>FR</th>
<th>ES</th>
<th>US</th>
<th>Global</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>3738</td>
<td>88</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2018</td>
<td>4959</td>
<td>82</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

More catalog research:

- **EU28** – European Audiovisual Observatory 2016, 2017, 2018
- **FR** – Richy et al 2018
- **ES** – Albornoz & García 2018
- **US** – Lozano 2019
- **Global** – Aguiar & Waldfogel 2018

Irreconcilable truths?

16% of Netflix EU catalogs is auteur cinema.

Irreconcilable truths?

16% of Netflix EU catalogs is auteur cinema.


Which metric matters?

Presence in catalog (content diversity 1)
vs. proportion of catalog (content diversity 2)
vs. consumption (exposure diversity)

Other diversity metrics: visibility / discoverability, origin of original productions, genre, language, etc...
Conclusion: research possibilities

Catalog research  established
Visibility research  nascent
Consumption research  black box problem
## Conclusion: research possibilities

<table>
<thead>
<tr>
<th>Research Area</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Catalog research</td>
<td>established</td>
</tr>
<tr>
<td>Visibility research</td>
<td>nascent</td>
</tr>
<tr>
<td>Consumption research</td>
<td>black box problem</td>
</tr>
</tbody>
</table>

Many thanks to Amanda Lotz and the Global Internet Television Consortium members


*Netflix Nations* open-access [http://opensquare.nyupress.org](http://opensquare.nyupress.org)