The Italian Catalogue of Netflix: Highly American, Lowly Local

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The Italian ecosystem of VIDEO ON DEMAND SERVICES
The Italian SVOD ecosystem: a fragmented land

<table>
<thead>
<tr>
<th>Service</th>
<th>Year of arrival</th>
<th>Subscribers</th>
<th>Ownership</th>
</tr>
</thead>
<tbody>
<tr>
<td>Netflix</td>
<td>2015</td>
<td>2M</td>
<td>NETFLIX, US</td>
</tr>
<tr>
<td>TIMVISION</td>
<td>2016</td>
<td>0.8-1M (not confirmed)</td>
<td>TELECOM Italia, IT</td>
</tr>
<tr>
<td>prime video</td>
<td>2016</td>
<td>1.2M (not confirmed)</td>
<td>AMAZON, US</td>
</tr>
<tr>
<td>Chili</td>
<td>2012</td>
<td>Unknown</td>
<td>Chili, IT</td>
</tr>
<tr>
<td>Rakuten TV</td>
<td>2013</td>
<td>Unknown</td>
<td>Rakuten, JAP</td>
</tr>
<tr>
<td>Vodafone TV</td>
<td>2018</td>
<td>0.1M</td>
<td>Vodafone Group, UK</td>
</tr>
<tr>
<td>SKY-COMCAST</td>
<td>2014</td>
<td>0.2M</td>
<td>SKY-COMCAST, US</td>
</tr>
<tr>
<td>AMEXENT</td>
<td>2013</td>
<td>Unknown</td>
<td>AMEXENT, IT</td>
</tr>
<tr>
<td>Discovery</td>
<td>2013</td>
<td>Unknown</td>
<td>Discovery, US</td>
</tr>
</tbody>
</table>
OTT (OVER THE TOP) Subscription video on demand (SVOD) SERVICES

4 million subscribers

2 million subscribers

6 million subscribers

Source: Ovum + Il Sol 24 Ore July 2019)
SVOD vs. digital terrestrial and satellite subscriber-supported television services

6 million subscribers

6,5 million subscribers
Advertising based video on demand (AVOD) SERVICES

Source: Ovum + Il Sol 24 Ore July 2019)
Regulatory framework in Italy

With respect to obligations to promote European audiovisual productions, AGCOM, the Italian agency for the government of Telecommunications, requires 20% of European content included in the catalogue. Alternatively, a service can invest 5% of revenues of the previous year for European content acquisition or production. On demand services are due to reach these quotas in four years, and depending on market conditions.

This general framework is going to change again following the adoption of the Digital Single Market Strategy in Europe, with particular reference to the revision of Directive 2010/13/EU (Audiovisual Media Services).
Geographies of Netflix: The Italian Catalogue

Content analysis
Methodology

**WHAT:** Content analysis of all the titles (referencias audiovisuales) available on the Italian catalogue of Netflix + content analysis of the personalised catalogue of a user

\[ N = 3,135 \] titles (Italian catalogue)
\[ N = 1,350 \] titles (personalised catalogue)

**WHEN:** August 2019

**HOW:** the analysis followed the code-book provided by Albornoz and García Leiva («NETFLIX y la diversidad audiovisual en el espacio iberoamericano, 2018-2019»)
29% serialized content
71% Film
989 titles out of 3,135 (32%) are «NETFLIX ORIGINAL» PRODUCTIONS

Among the original productions, 52% are serialized contents
27% COMEDY
16% DOCUMENTARIES
14% DRAMA
13% ACTION
6% CRIME
6% ADVENTURE
4% HORROR
4% ROMANTIC
4% SCI-FI
3%
2%
70% of the catalogue based on titles released in the last 5 years (2014–2019)
Country of production (pais de origen)

52% from US
8% from UK
5% from Italy (4° place)
...
3% from Spain

Europe (UK included: 20%)
### Country of the Location (Localización)

<table>
<thead>
<tr>
<th>Location</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA</td>
<td>56%</td>
</tr>
<tr>
<td>UK</td>
<td>9%</td>
</tr>
<tr>
<td>Canada</td>
<td>8%</td>
</tr>
<tr>
<td>Italia</td>
<td>8%</td>
</tr>
<tr>
<td>India</td>
<td>7%</td>
</tr>
<tr>
<td>Giappone</td>
<td>5%</td>
</tr>
<tr>
<td>Spagna</td>
<td>4%</td>
</tr>
<tr>
<td>Francia</td>
<td>3%</td>
</tr>
<tr>
<td>Germania</td>
<td>2%</td>
</tr>
<tr>
<td>Messico</td>
<td>2%</td>
</tr>
<tr>
<td>Argentina</td>
<td>2%</td>
</tr>
<tr>
<td>Corea del Sud</td>
<td>2%</td>
</tr>
<tr>
<td>Cina</td>
<td>1%</td>
</tr>
<tr>
<td>Israele</td>
<td>1%</td>
</tr>
</tbody>
</table>

- **56%** localised in US
- **9%** from UK
- **8%** in Italy (4° place)

**Europe (UK included: 26%)**
Italy: the worst European country at watching audiovisual content in English

Percentage of respondents per country watching audiovisual content in English.

Source: European Commission (2015), Flash Eurobarometer 411: Crossborder access to online content
Gender of the main characters in Netflix original productions: 60% male vs. 40% female
Gender of the main characters in Netflix original series

57% male vs. 43% female

Gender of the main characters in non original series

59% male vs. 41% female

Both Netflix productions (films + series) are slightly more gender balanced than non original productions.
To sum it up:

Highly global, lowly local
(but less american than expected. In 2014, Netflix chief content officer Ted Sarandos stated that the hidden formula of the catalogue was 80-85% Hollywood + international content and 15-20% local)

Italian Netflix is about Comedy, Documentaries, drama and action

56% of the titles are stories located in the United States

70% of the catalogue based on titles released in the last 5 years (2014–2019)

69% of the titles are originally in English

Both Netflix productions (films + series) are slightly more gender balanced than non original productions
Content analysis of the user home page

- 3135 titles
  - Italian Netflix Catalogue
- 1350 titles
  - User homepage
Italian Netflix Catalogue vs. personalised catalogue

User: 23 years female, university student

52% of the titles are produced in US

56% of the titles are stories located in the United States

32% of the titles are NETFLIX ORIGINALS

70% of the catalogue based on titles released in the last 5 years (2014–2019)

69% of the titles are originally in English

63% of the gender of the main characters is male

68,5% of the titles are produced in US

53% of the titles are stories located in the United States

58% of the titles are NETFLIX ORIGINALS

86% of the catalogue based on titles released in the last 5 years (2014–2019)

83% of the titles are originally in English

50,5% of the gender of the main characters is male
These data should be treated with caution, because:

1) **Recommendation algorithms** re-shuffle and change the composition of the catalogue: “THE” Netflix catalogue is an abstract cultural object that exists only in the Netflix servers distributed around the globe. Each Italian subscriber experiences a version of this catalogue that only partially overlaps with that of the other users. The Netflix catalogue is a “contingent commodity” (Nieborg & Poell 2018).

2) **We don’t know nothing about the reception of these contents**, the “relevant prominence, popularity or cultural impact of such content” (Lobato 2018: 142). We should couple a CPE (Critical Political Economy of the media, Hardy 2014) approach with a cultural studies approach, more centered on reception studies and audience agency.

3) **We don’t know nothing about the cultural impact of this catalogue on Italian audiences**. The audience that seems to be more exposed to Netflix American contents is the Italian middle-upper class with a certain disposal of cultural and economic capital, culturally cosmopolitan, used to travel abroad and speak one or two foreign languages, a cultural elite of the country, so far limited to 2 millions subscribers.

4) In order to have a general picture of the **level of audiovisual content diversity** to which the Italian viewer is exposed, we should be able to compare these data with the composition of Italian broadcast TV and of all the other VOD catalogues available in Italy. + analyse the **EXPOSURE DIVERSITY** (see Natali Helberger (2018) “Challenging diversity - social media platforms and a new conception of media diversity” in Tambini & Moore, Digital Dominance, Oxford: Oxford University Press).