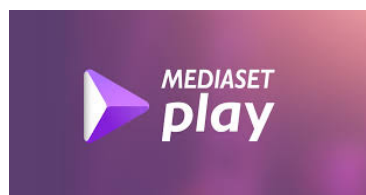
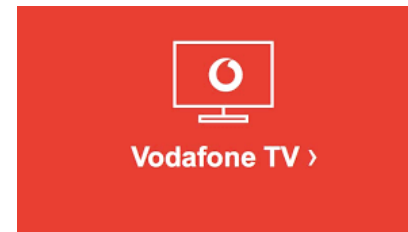


# The Italian Catalogue of **Netflix**:

## Highly American, Lowly Local



# The Italian ecosystem of VIDEO ON DEMAND SERVICES



# The Italian SVOD ecosystem: a fragmented land



Year of arrival: **2015**  
Subscribers: **2M**  
Ownership: **NETFLIX, US**



Year of arrival: **2014**  
Subscribers: **0,2M**  
Ownership: **SKY-COMCAST, US**



Year of arrival: **2016**  
Subscribers: **0,8-1M (not confirmed)**  
Ownership: **TELECOM Italia, IT**



Year of arrival: **2012**  
Subscribers: **Unknown**  
Ownership: **Chili, IT**



Year of arrival: **2019**  
Subscribers: **Unknown**  
Ownership: **Rakuten, JAP**



Year of arrival: **2016**  
Subscribers: **1.2M (not confirmed)**  
Ownership: **AMAZON, US**



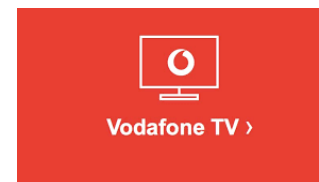
Year of arrival: **2013**  
Subscribers: **Unknown**  
Ownership: **Cakarel, TURKEY**



Year of arrival: **2013**  
Subscribers: **Unknown**  
Ownership: **Discovery, US**

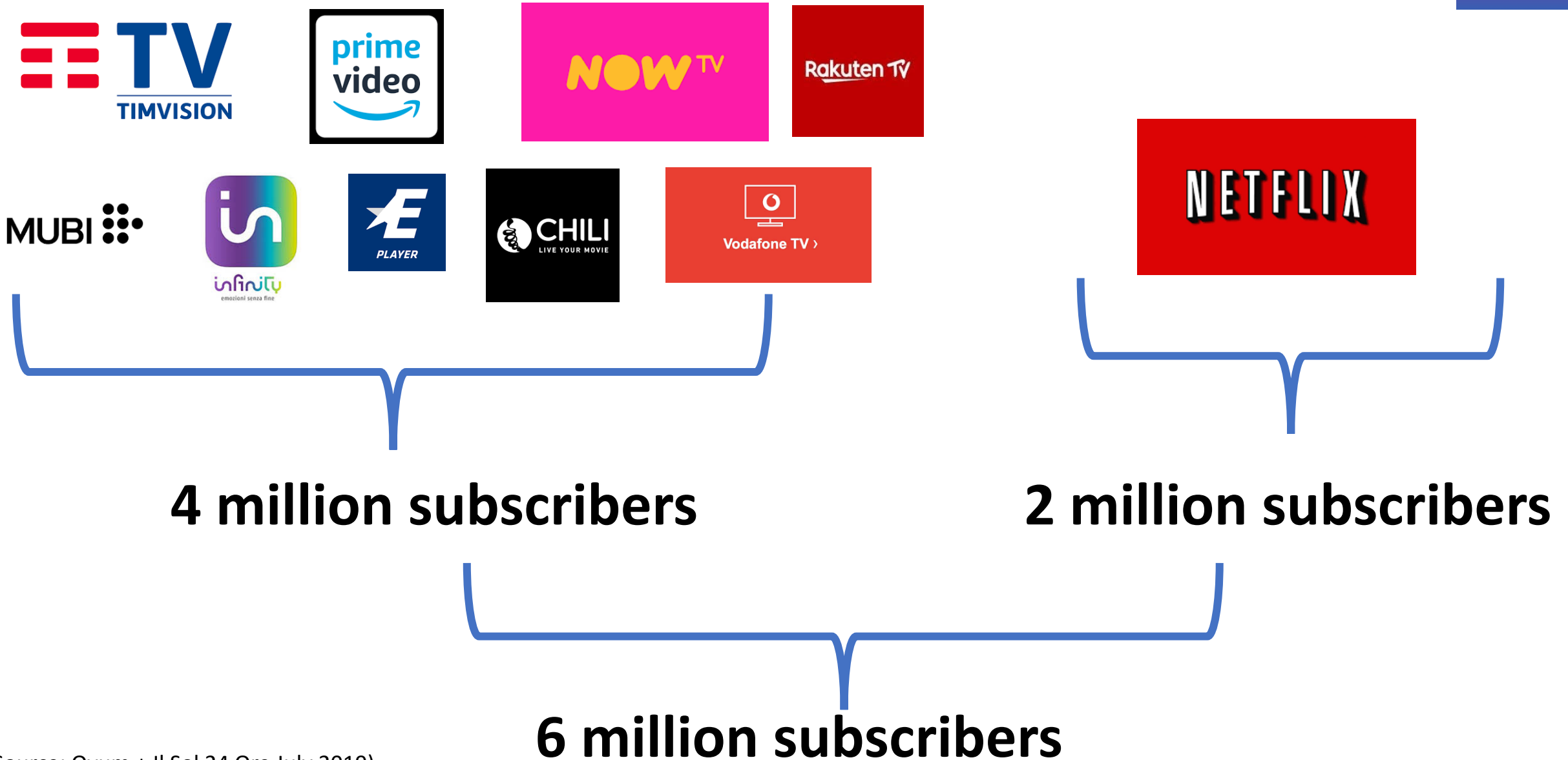


Year of arrival: **2013**  
Subscribers: **0,8M (not confirmed)**  
Ownership: **MEDIASET, IT**



Year of arrival: **2018**  
Subscribers: **0,1M**  
Ownership: **Vodafone Group, UK**

# OTT (OVER THE TOP) Subscription video on demand (SVOD) SERVICES



# SVOD

VS.

# digital terrestrial and satellite subscriber-supported television services



6 million subscribers



6,5 million subscribers

# Advertising based video on demand (AVOD) SERVICES

**You Tube**

**Rai Play**

**MEDIASET  
play**

**play**

**25 millions users (2019)**

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.**

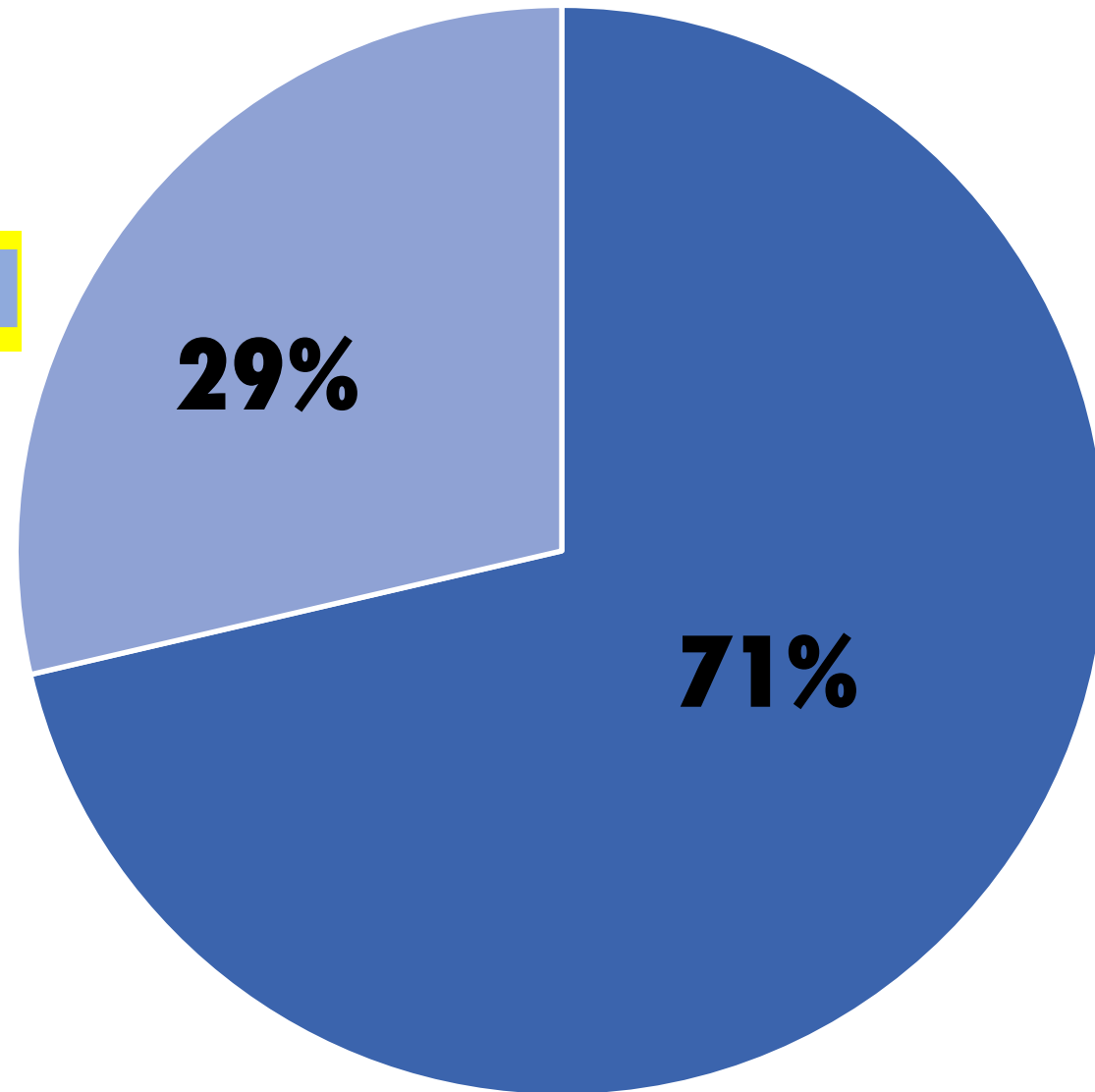
This general framework is going to change again following the adoption of the Digital Single Market Strategy in Europe, with particular reference to the [revision of Directive 2010/13/EU](#) (Audiovisual Media Services).








**serialized  
content**



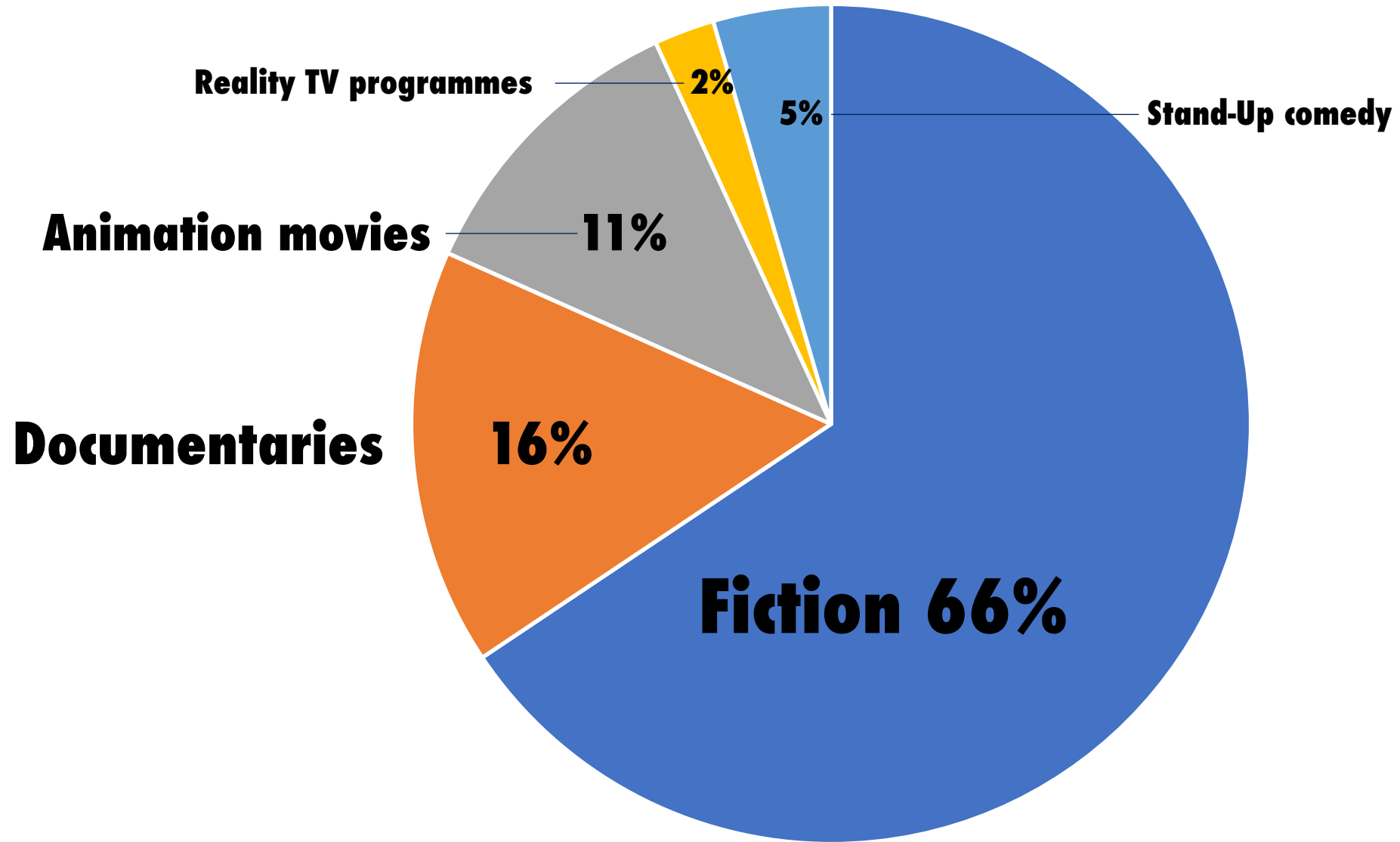
**Film**

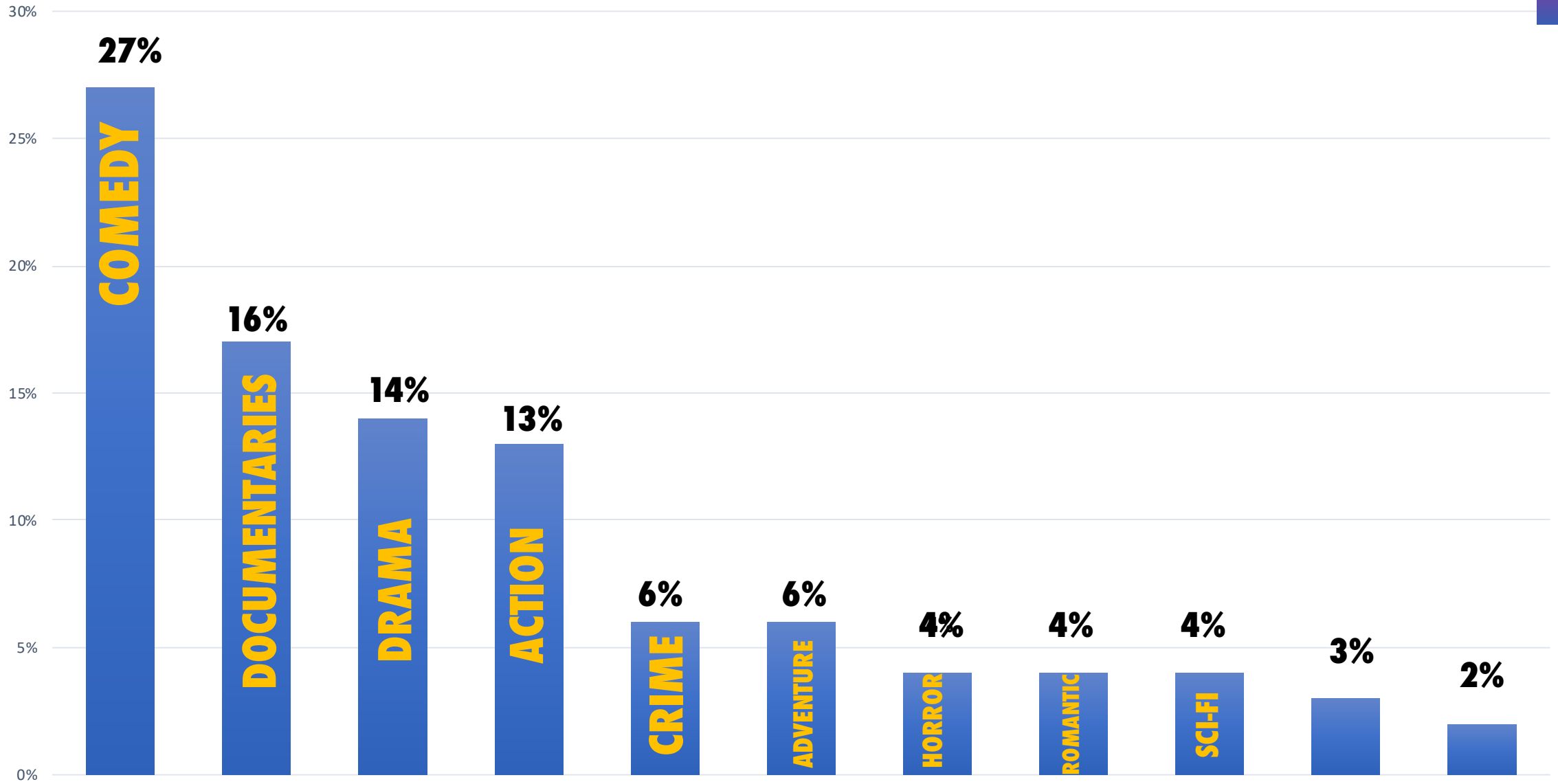


A **NETFLIX** ORIGINAL SERIES

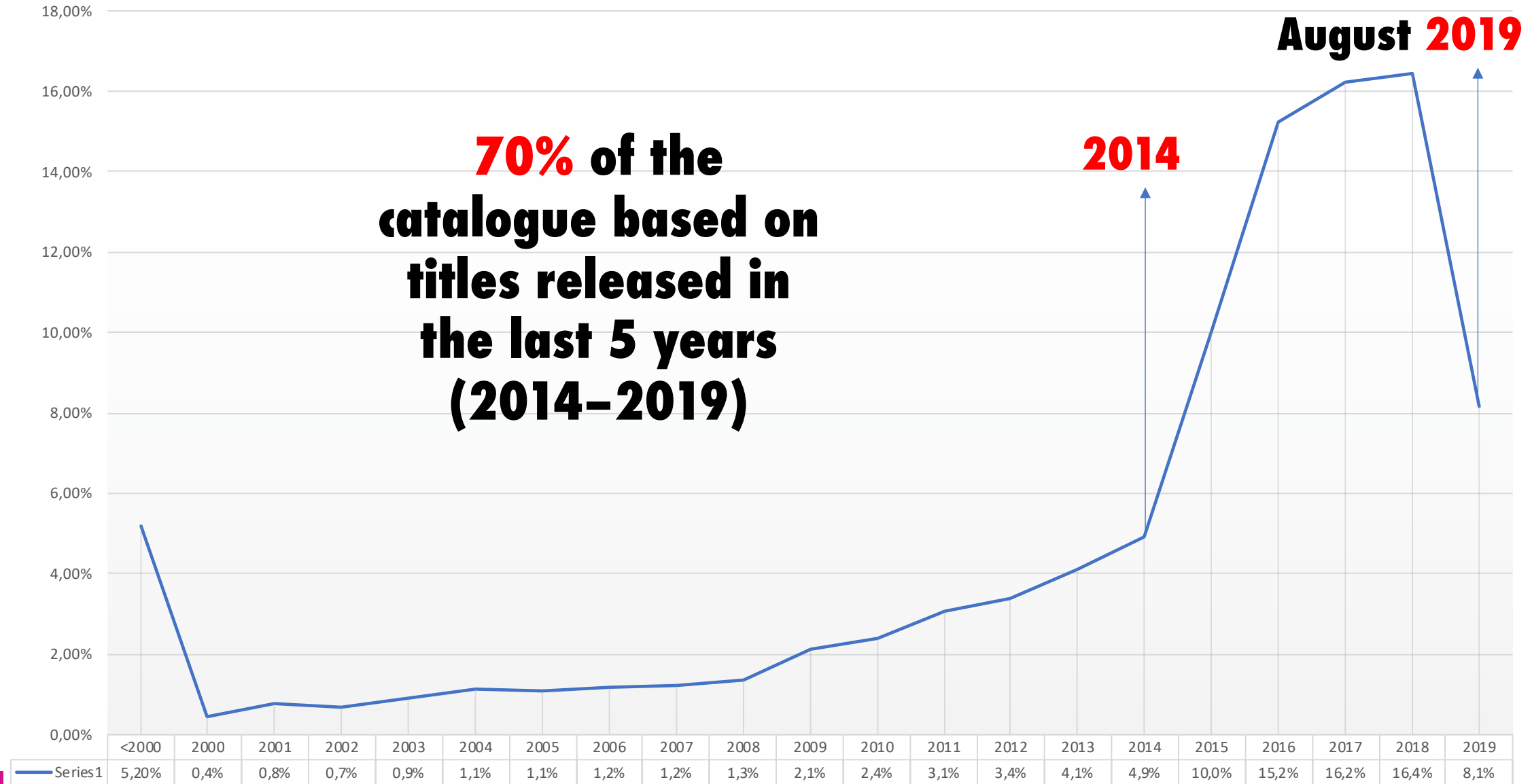
**989 titles out of 3,135 (32%) are «NETFLIX ORIGINAL» PRODUCTIONS**

**Among the original productions, 52% are serialized contents**

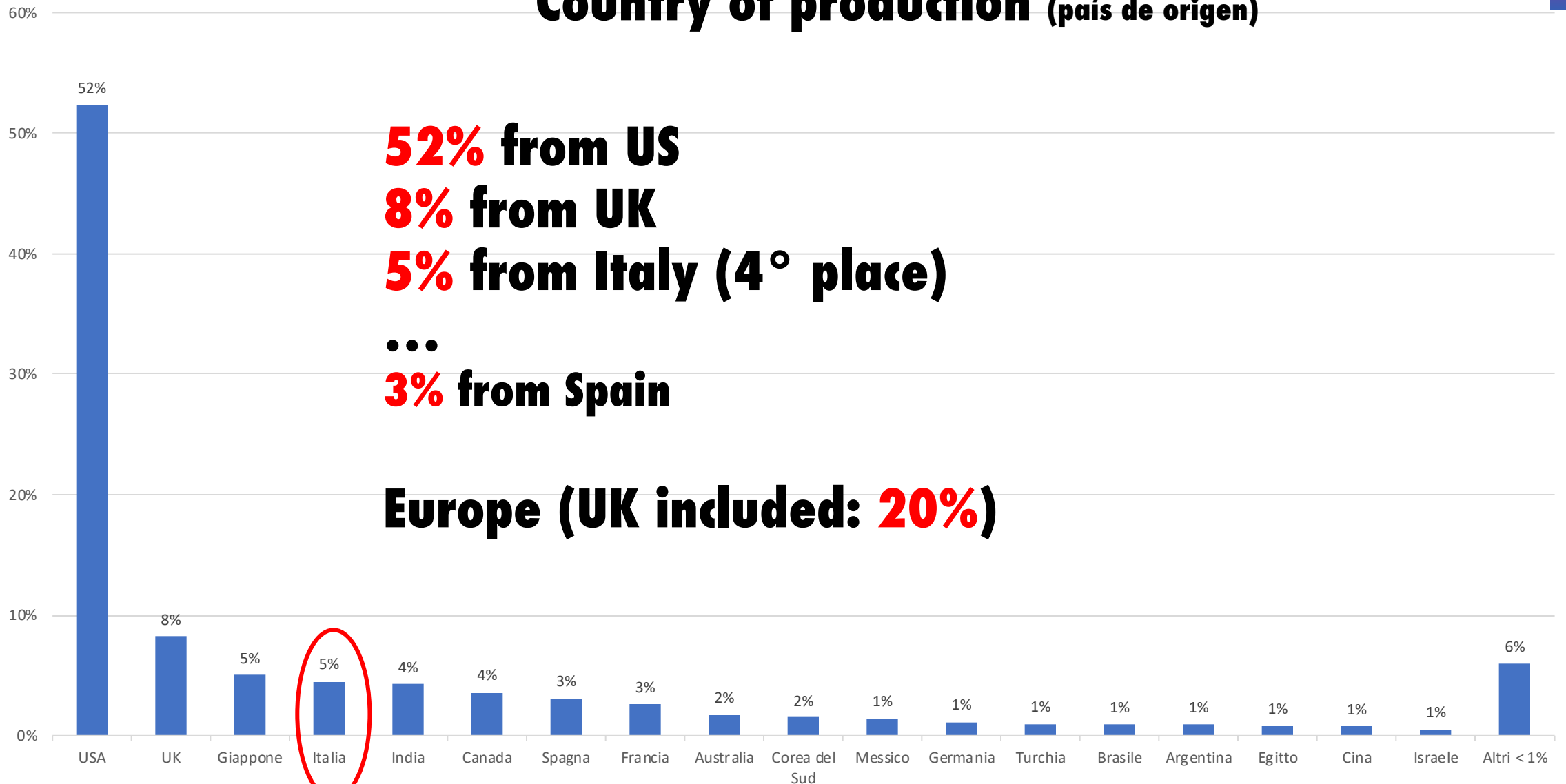




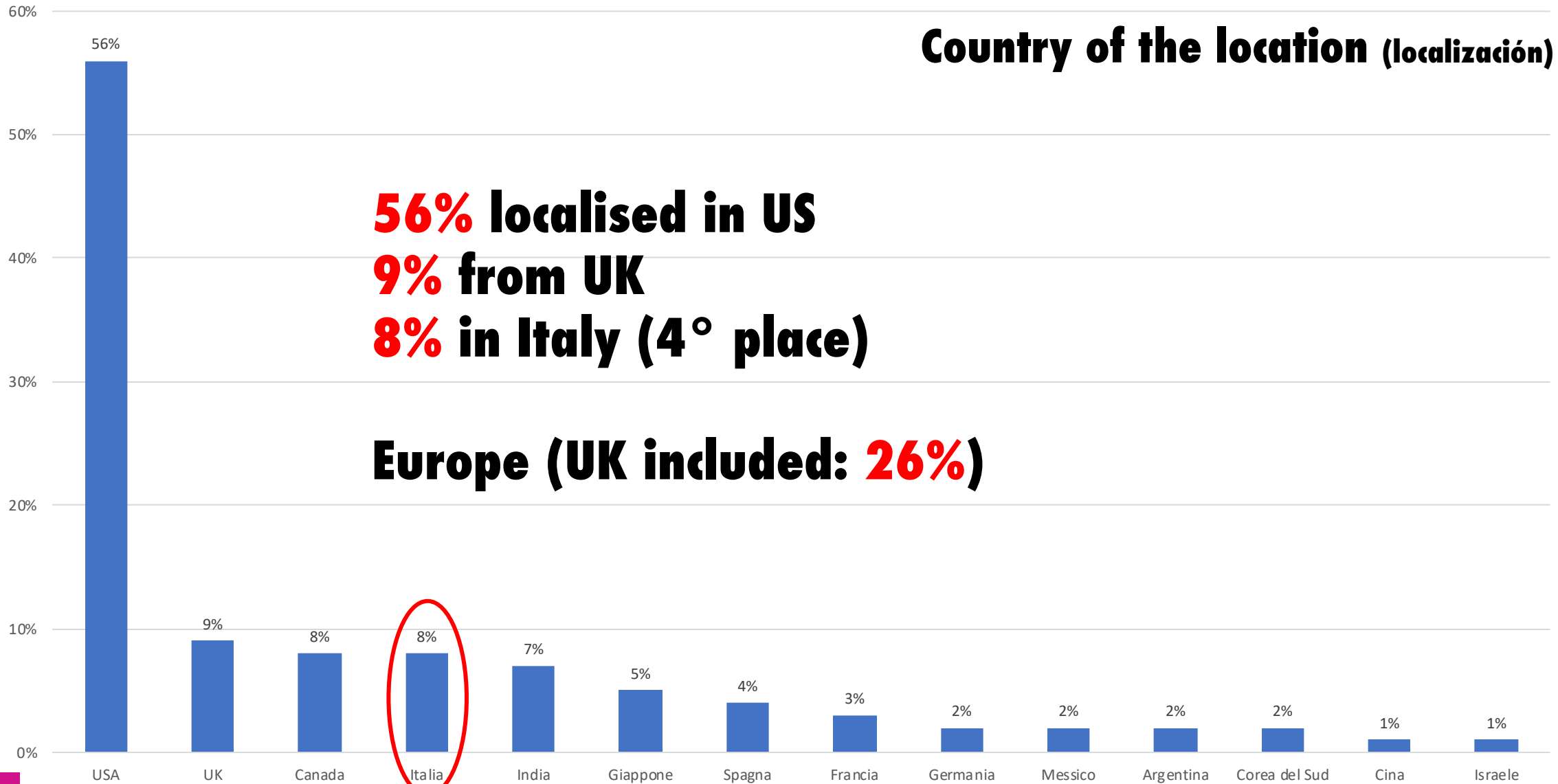
**70% of the  
catalogue based on  
titles released in  
the last 5 years  
(2014-2019)**



## Country of production (país de origen)



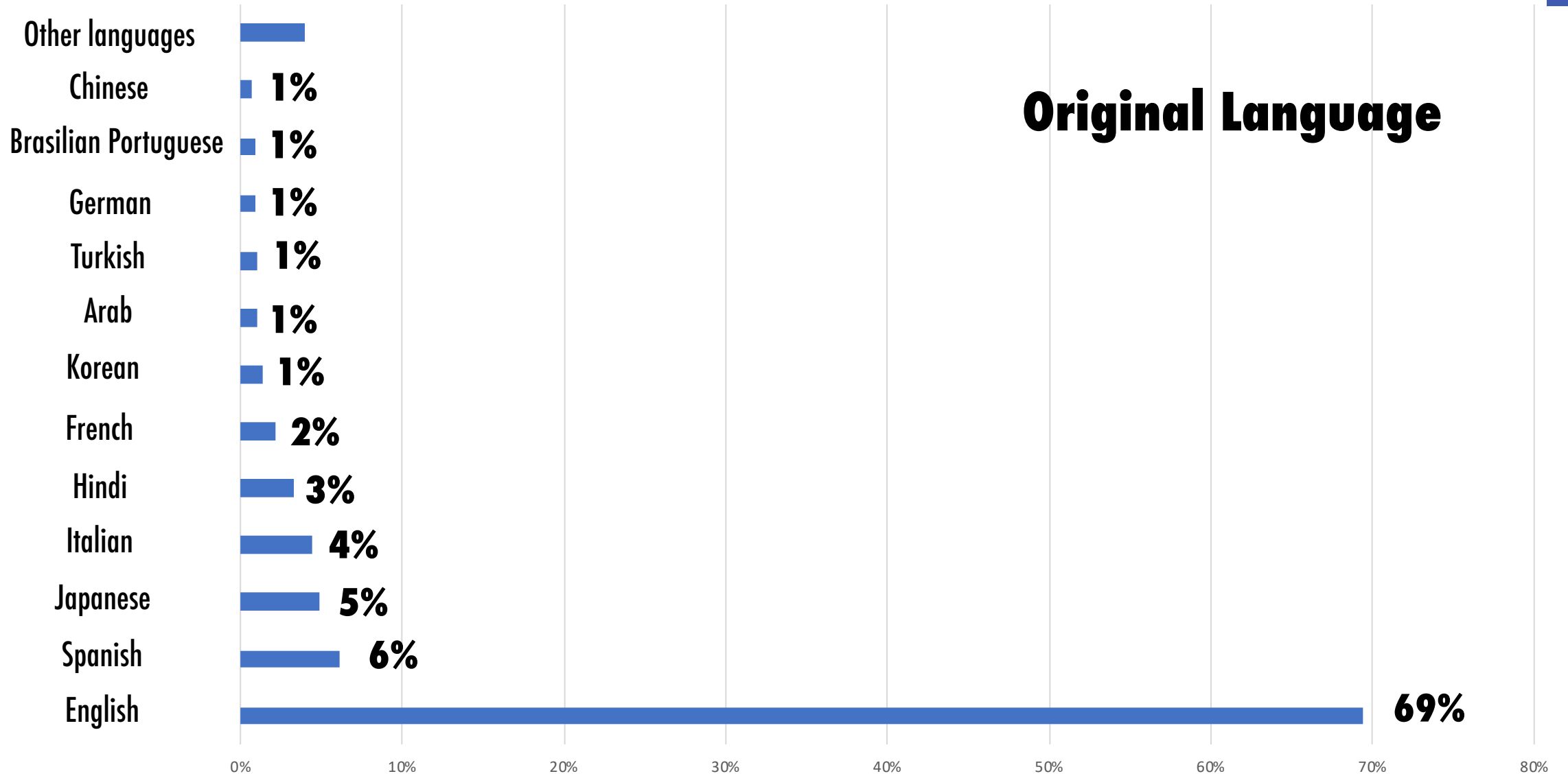
## Country of the location (localización)



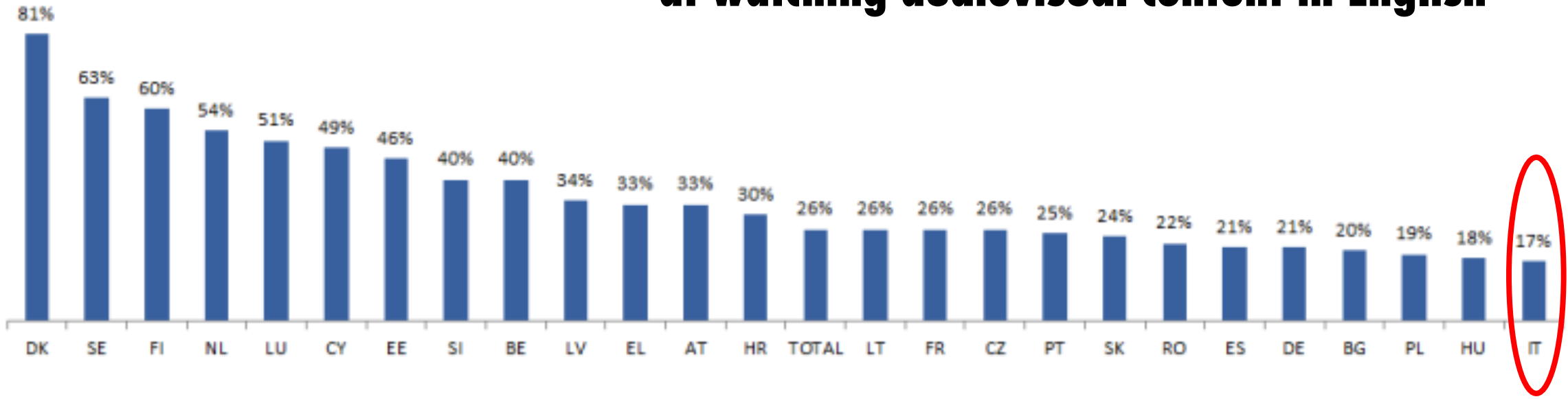
**56% localised in US**  
**9% from UK**  
**8% in Italy (4° place)**

**Europe (UK included: 26%)**





## Italy: the worst European country at watching audiovisual content in English



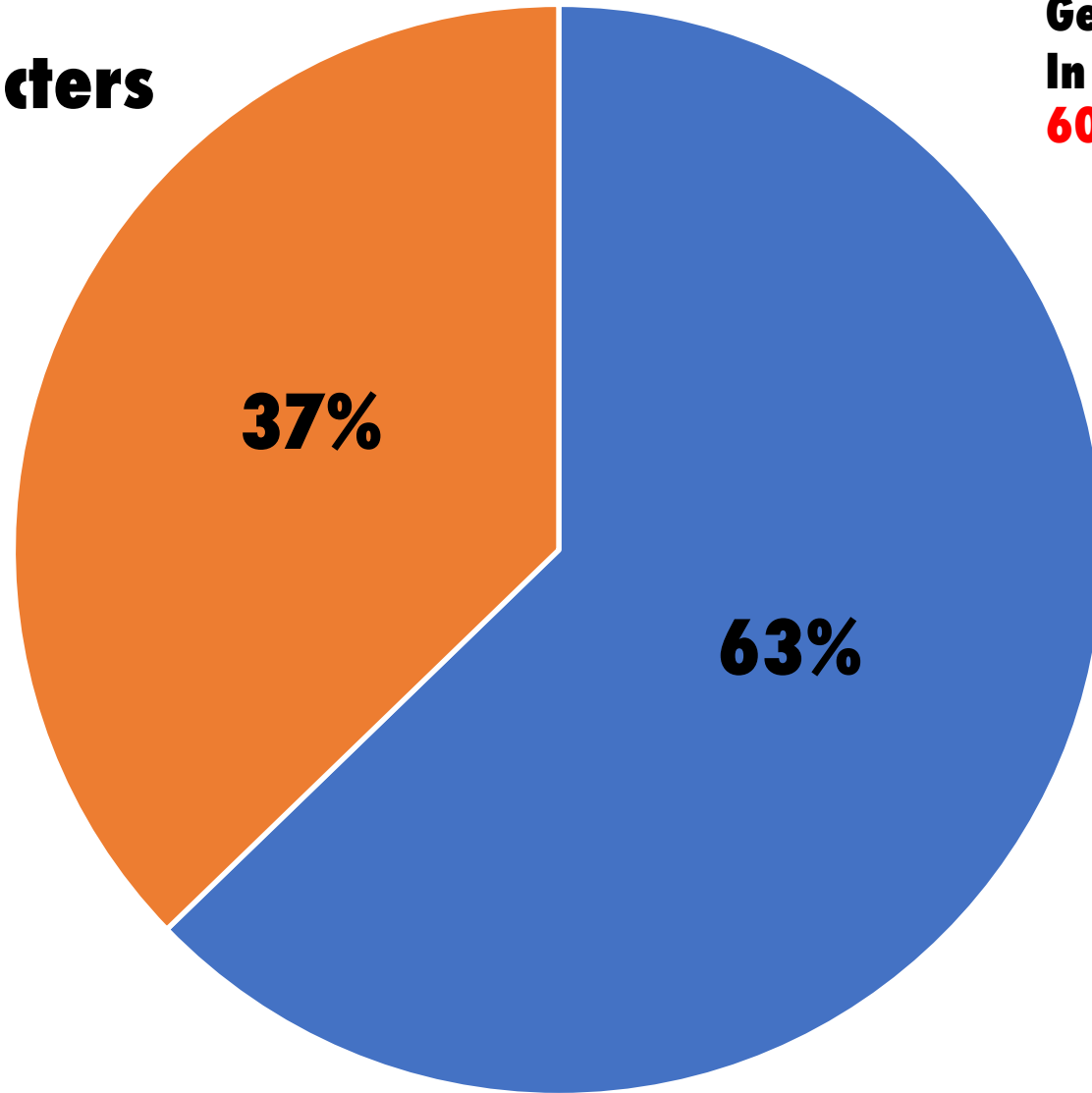
**Percentage of respondents per country watching audiovisual content in English.**

Source: European Commission (2015), Flash Eurobarometer 411: Crossborder access to online content

# Gender of the main characters

Gender of the main characters  
In Netflix original productions:  
**60% male vs. 40% female**

**female**



**63%**

**37%**

**male**

## 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

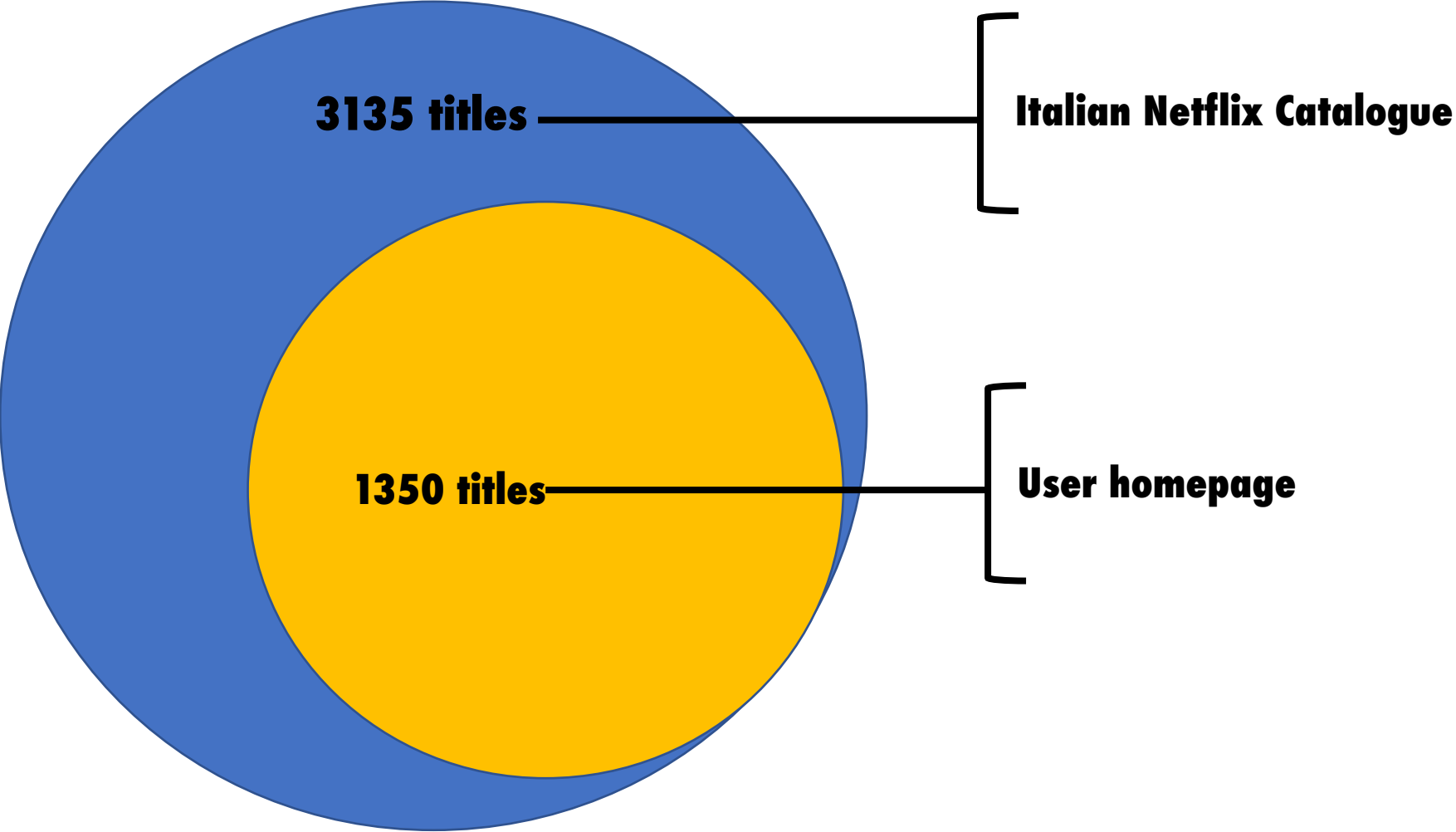
**56%** of the titles are stories located in the United States

**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



# 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)