

Netflix Originals in Europe



A SoDA UKFIGS Report by **Digital-i**
1st January 2019 – 31st December 2019

The detailed viewing data in this report comes directly from **Digital-i's** unique **SVOD** analysis and visualisation software, [SoDA](#).

Report Summary



This report is designed to investigate how Netflix Originals perform across the UK and Europe.

Netflix Originals (in this case, any piece of content for which Netflix the exclusive international distribution rights) are an ideal way to compare how content travels across territories on the same platform. In this report, we investigated the performance of original content across 5 key territories (UK FIGS) to unearth key insights into Netflix's international strategy.

Our findings shed light on the ways that producers, broadcasters and studios can improve their catalogues, licensing strategies and pitches to appeal to, or compete with global SVOD giants.

The report contains the following sections:

- What makes a global hit?
 - Themes, genres and key factors that lead to Netflix Originals becoming global successes
- The nuances of localised content
 - How to recognise the type of content that will mainly appeal to a domestic market through genre, themes and Netflix's promotional strategy
- How to learn from Netflix's strategy
 - A summary of pointers and advice for producers, BVOD stakeholders and challenger SVOD services.

Cross-territory analysis of content has never been more important as streaming platforms are proliferating and unmatched viewing sees no signs of slowing. Our multi-territory Netflix data acts as a window into the future of Netflix as it continues to expand its subscriber base in less established markets.



What makes a global hit?



Genres and Themes: Sci-Fi, Fantasy, and Horror are among the best travellers

An initial dive into the data suggests that international popularity is strongly linked to genre. Whilst **comedy**, **drama** and **documentary** series tend to have varying degrees of success across multiple territories in Europe; **sci-fi, fantasy and horror content displays a more consistent level of performance**. In particular, shows like *Stranger Things*, *The Witcher*, *You* and *Umbrella Academy* have proved popular across Europe during 2019.

Four of the top five series across UK FIGS in 2019 contained elements of sci-fi, fantasy and horror. These more 'otherworldly' settings and stories seem to surpass cultural and linguistic barriers to appeal to viewers across Europe. Other examples of sci-fi and horror content that has travelled well include the Russian-language sci-fi series, *Better Than Us* and the French production, *Black Spot*. Removing the UK, where few non-English language productions gain popularity, the German sci-fi series, *Dark*, and the Danish horror series, *The Rain*, all performed well across the FIGS region.

Genres

Netflix has a strong history of using big Hollywood names in its series and movies, and this has proven particularly successful when it comes to creating movies that perform well across multiple territories.

Both movies in the top 10 have established Hollywood stars as part of their cast (Adam Sandler, Jennifer Anniston, Ryan Reynolds).

Colour, budgets, dynamism, and subversion link many of the programmes in this top 10. *Sex Education* and *You* subvert the classic theme of 'American teen dramas' while *Money Heist* subverts the heist genre by interlacing it with hot emotional interactions. Even though genre gives us a good idea of what shows will 'go global', **it is clear that there are exceptions.**

Themes

Top 10 Series / Movies, Netflix Subscriber Household Reach % x Country & Total UK FIGS, 2019, Netflix

Title	Season	UK FIGS	France	Germany	Italy	Spain	United Kingdom
Stranger Things	3	43.2%	40.8%	31.3%	46.5%	50.1%	48.1%
Sex Education	1	39.6%	41.4%	25.4%	43.0%	44.5%	44.9%
Umbrella Academy	1	38.6%	42.2%	23.6%	38.7%	37.1%	47.6%
You	1	38.2%	38.6%	26.1%	31.8%	38.0%	48.7%
Murder Mystery	-	37.5%	30.2%	24.0%	44.9%	39.7%	46.2%
The Witcher	1	36.7%	37.0%	37.8%	31.6%	43.3%	34.9%
Stranger Things	1	36.3%	42.6%	26.4%	40.0%	42.2%	36.1%
Money Heist	1	33.5%	48.2%	26.6%	53.0%	51.7%	15.7%
Black Mirror	5	33.0%	32.9%	17.9%	31.9%	37.9%	41.6%
6 Underground	-	32.6%	34.3%	29.5%	34.6%	34.6%	32.2%



Exceptions: Some US content cannot surpass language barriers

One interesting piece of insight from our analysis of programme performance is that generally speaking, documentaries do not travel well across the UKFIGS region, but what about the prevalence of big budget US content in the top charts of Netflix shows?

Looking at some high profile US docs and their performance in the UK region, a trend starts to emerge. The US docs are relatively successful in the UK, especially the likes of *Conversations with a Killer: The Ted Bundy Tapes*, but the series did not draw the attention of viewers from the FIGS region. It is tempting to say that language is the only factor in this difference, but if that were so, then how could US productions like *Stranger Things* be such global hits? There are various factors at play here; the quality of dubbing, the difference between watching factual foreign language content and a foreign drama, and Netflix's promotional strategy - **we should not underestimate the**

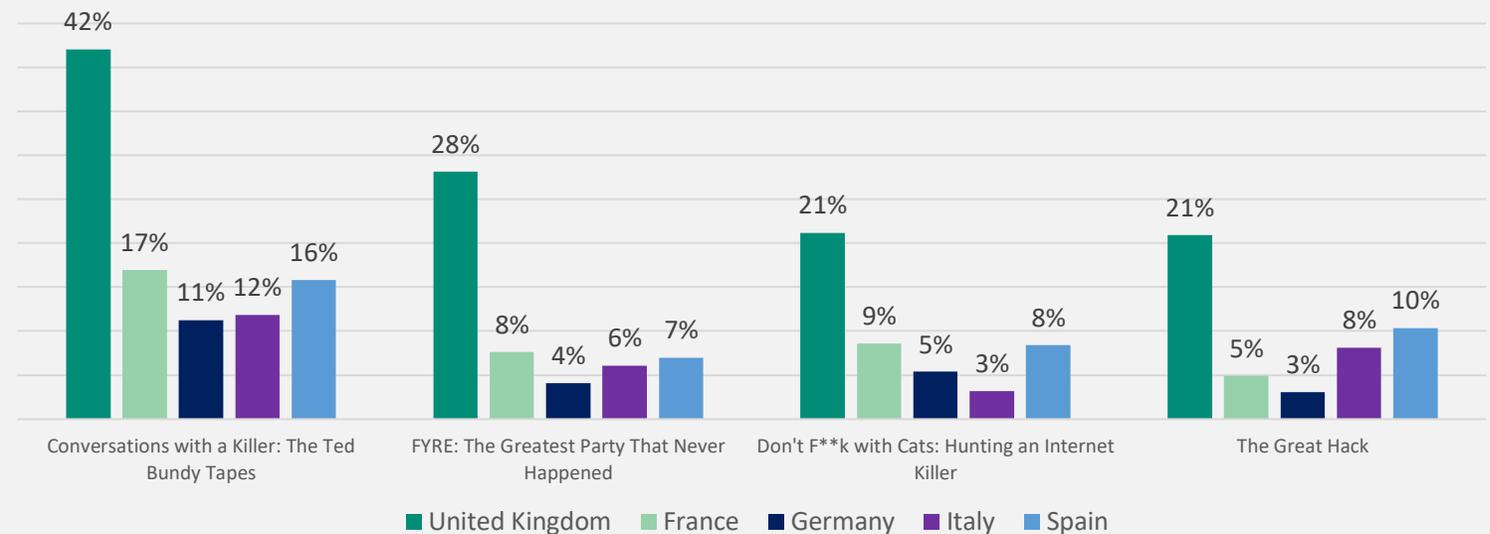
Language

Culture

UK viewers tend to show more interest in this style of content than Netflix viewers in continental Europe. This is clear from an analysis of our data showing that documentaries make up a larger proportion of UK Netflix viewing that they do in France, Spain, Italy or Germany.

Furthermore, the public broadcasters and linear channels in each FIGS country have a large offering of local documentaries which would appeal more to each country's individual language and culture.

Netflix Subscriber Household Reach % x Country, 2019, Netflix



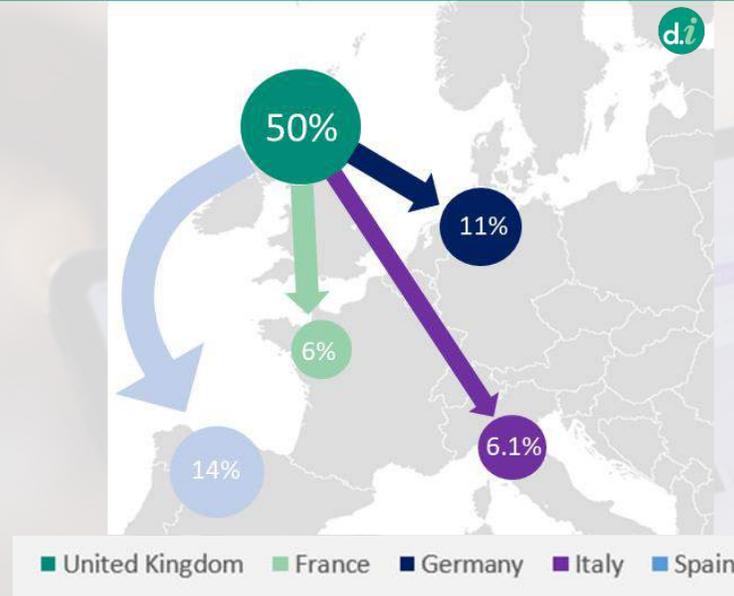


The nuances of localised content



Genres and Themes: Domestic content appeals only to domestic viewers.

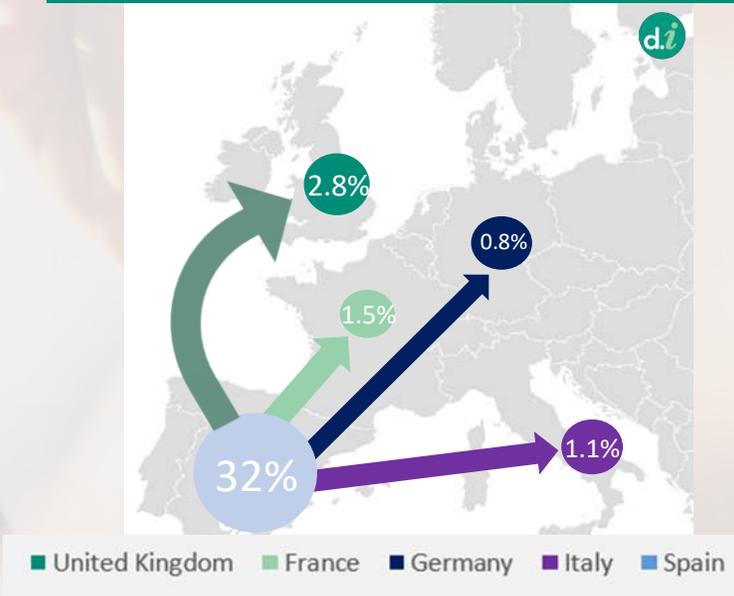
The Disappearance of Madeleine McCann



50% of all UK Netflix households watched at least part of the Madeleine McCann documentary. The levels of viewing in other European territories was much lower. **The best performance outside of the UK was in Spain where 14% of Netflix households tuned in to the doc.** The case was not unheard of in Spain, as the Spanish police were, at one point, involved in the investigation.

To a European audience, this documentary may not have resonated, since the name Madeleine McCann is not a household name the way it is in the UK. Even at the time of writing this report, the McCann family and their missing daughter is making tabloid headlines. But, its lack of international success doesn't mean that it was not a valuable piece of content for Netflix. **Domestic hits help maintain Netflix's awareness in the national consciousness.**

The Alcàsser Murders



Just over 30% of all Spanish Netflix households tuned in to watch this Spanish true crime doc in 2019. The case was gruesome, high profile and even inspired various TV journalists at the time to perform their own investigations. However, the case was not widely known outside of Spain, meaning that the barrier of language, setting and culture would be obstacle enough for viewers not to try the content.

It's necessary to draw attention to Netflix's algorithms and promotional strategy. From Netflix's analysis, this (like the Madeleine McCann documentary) was a piece of content for Spanish subscribers, and so, it is unlikely to have been promoted widely across Europe. **For Netflix, newsworthiness, genre, themes, language and setting help decide what and where a show should be promoted.**

Exceptions: Universal themes surpass the limitations of genre

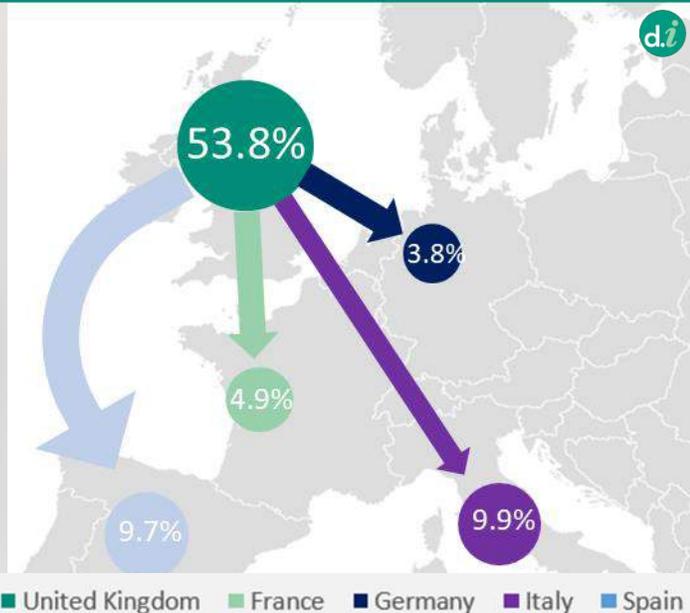
***Sex Education* and *Afterlife* both generated large amounts of viewing in the UK.** However, *Afterlife* was only a hit among the Brits. Both were comedy-dramas, so why the difference? What were the differences in the content and the rationale behind Netflix's promotional strategy when it came to these two programmes? Well, ***Afterlife* is clearly set in a British town and the plot is a dark twist of comedy and grief, showcasing a very British way of dealing with loss.** *Afterlife*, although not internationally successful, generated a lot of interest and hype in the UK, thus raising Netflix's profile among the British viewership.



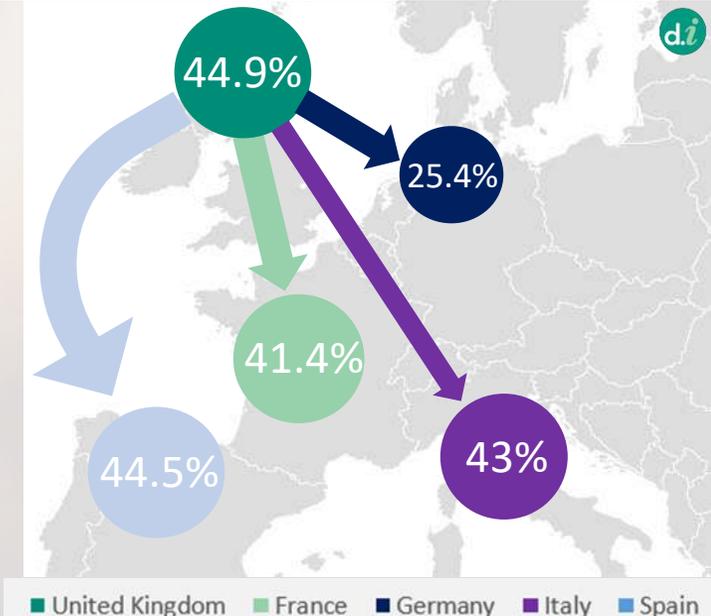
Sex Education was filmed in Wales and is set at a British school. Nevertheless, there are various ways in which the filming, the school set and even the lack of school uniforms suggest a melding of US and UK culture. ***Sex Education* is not highly localised and deals with the themes of teen life, romance and sexual awakening.** In this case, Digital-i (and perhaps Netflix) believe that the themes, setting and characters from *Sex Education* are internationally relevant and appealing. *Sex Education* was popular in Italy, Spain and France, obtaining around **40% Household reach** across all of UKFIGS apart from Germany.



Afterlife



Sex Education





How to learn from Netflix's strategy



Key Pointers from Netflix's strategy

BVOD Services

- ❖ Netflix's cost-effective international strategy is impossible to beat when it comes to global hits, but that doesn't mean that BVODs cannot profit from the data behind Netflix's successes.
- ❖ Promotional strategies and algorithms are VOD's answer to scheduling, investigating Netflix's hugely successful promotional and distribution strategy can fast-track BVOD success.

Content producers

- ❖ Global hits are not limited by language or country of production, Netflix is more likely to promote content on a global scale when it contains elements of sci-fi and fantasy and is visually striking.
- ❖ Documentaries and comedies are almost always considered to be content destined for one principal country (apart from the US/UK content corridor). This content is still of value to Netflix, especially in countries where it has a limited range of local Original content.

SVOD challengers

- ❖ Netflix's international strategy and categorisation of shows has been globally successful, it is worth adopting parts of their strategy along the path of global expansion.
- ❖ Global content does not have to be US-based or English language, even though that is the safest way to appeal to viewers across the globe. International cooperation (e.g. *White Lines*, *Narcos*) can directly speak to more than one country or region, especially when the themes are universal.

Final thoughts



This report has touched upon the types of analysis that is now available to Digital-i and our clients with regard to international Netflix viewing. **It demonstrates the rich wealth of data and valuable strategy that can be used by programme-makers, broadcasters and SVOD services to gain a competitive edge in a market which has long been dominated by one player, Netflix.**

Netflix's success is, in a large part, due to its clever, data-driven and ample international content and promotional strategy. Using years of data to categorise viewers, programmes and markets, they appeal to the global audience as a whole and communicate local stories that touch the hearts of the viewers in each Netflix region. For years, they've benefited from the advantage of a secret blueprint of success and reams of data inaccessible to competitors. In fact, it is likely that their analysis was not dissimilar to what we present in this report, which in turn would have shaped contemporary viewing trends as a result of Netflix's content and promotional strategies.

Unlike linear broadcasters, for whom content successes and failures are measured by ratings services around the world and visible to competitors, Netflix has been able to track linear TV trends, while keeping their own viewing behind closed doors. In expanding our Netflix tracking service to the FIGS region, and with the view to expand globally, we want to give programme-makers and distributors the chance to understand Netflix's successes and failures, increase competitiveness in the market and drive all stakeholders on to providing better services and high-quality content to their home nations and the rest of the world.

One of the most interesting things that we're seeing in our data, is the appearance of global hits and universal themes. Netflix's business structure has allowed content to travel around the world far faster than was ever previously possible. Notably, the sci-fi and fantasy shows as well as the coming-of-age programmes demonstrate that, in spite of our differences, when it comes to imagination, viewers from all countries can be enchanted by the same story. In the particularly unprecedented time of the writing of this report, we feel that it is important to identify these universal stories and continue to reflect the astounding interconnectivity of the world we live in, while still showcasing and protecting individual cultures and their unique stories. We hope that you've found this report insightful and we look forward to working with more of you to help your companies and your content reach and speak to your target audiences.

Gain access to Digital-i's incredible SVOD data through SoDA

SoDA (Subscription on Demand Analytics) is an online portal that allows users to navigate a large database of international Netflix viewing data.

Digital-i pioneered a method of measuring Netflix viewing from **all devices (including TVs), back-data from 2017 and episode-level reporting.**

Our services are used by the UK's biggest broadcasters and international American studios to improve their SVOD and VOD players, content catalogues and release strategies.

For more information about SoDA and its capabilities contact

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"SoDA is opening the door on Netflix viewing like never before, enabling us to deliver insights that were simply unattainable a year ago."

Philip Martin and Paul Craigen, ITV