Standing up to Hollywood: the *Netflix* glocal strategy for popularising non-English-language series worldwide

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Abstract

Netflix non-English-language TV shows finding audiences beyond their country of origin is a significant change driven by the company, affecting both the production and distribution sectors as well as the audiovisual culture of Western viewers, who increasingly appreciate diverse audiovisual traditions. This investigation confirms a notable share of foreign product viewership by service users. Between June 2021 and December 2022, non-English TV shows accounted for 38% of the most popular *Netflix* TV rank in terms of accumulated viewing hours, reaching an average of more than 53 countries worldwide. This outcome results from two primary factors. The first is the company's business logic based on *big data*, content indexing, and user monitoring. The second is the global popularity of local non-English speaking content, which is also the consequence of diverse actions taken by the company in project development, audience prototyping, distribution, language, marketing, recommendation algorithms, and social conversation, both locally and globally. This research focuses on *Netflix*'s *glocal* strategy as a case study and draws on direct interviews with company employees, audience data from its *Netflix Top 10* website, specialized publications, and academic literature.

Keywords

1. Introduction

Subscription-channel-driven audiovisual globalization is bringing about a sea-change in viewers' preferences, which for years have been influenced by Hollywood's "cultural imperialism" (**Limov**, 2020). Today, global audiences will recognize the gang of robbers operating under the supervision of a boss they call "the professor"; the exploits of the high-society burglar whose feats (inspired by an early 20th-century literary character) confound the police; and the macabre trials voluntary competitors take part in to win a huge money prize while putting their lives at risk. These are the premises of three recent television series (*Money Heist*, *Lupin*, and *Squid Game*) which differ from other international phenomena in that they were not produced in Hollywood, but in Spain, France, and South Korea, respectively. In all three productions (and many others, as this research confirms), neither language nor place of origin seem to have posed an obstacle to major global impact.

The huge rise in the popularity of local productions outside their country of origin and in their original broadcast format (as opposed to adaptions) is a phenomenon most closely associated with *Netflix*. The company's coverage (over 230 million clients in 190 countries, according to figures for the first quarter of 2023), distribution model (all at once and simultaneously worldwide), brand resonance, and type of promotion have led to success no other local series had previously achieved through the traditional distribution model of region-by-region international sales.

Today, subscription video-on-demand (SVOD) is fully consolidated, thanks not only to market maturity but also to the firm establishment of home digital entertainment. In their beginnings, direct-to-consumer services lived exclusively off third-party content, providing access months after the first commercial exploitation. Over time, the services evolved into a model also based on original and exclusive production, on which they have built their offer to differentiate themselves from competitors. It is also worth noting that subscription-based streaming platform profitability depends on attracting and retaining large customer numbers. The low subscription fee means each customer generates little average revenue per user (ARPU), hence most of the sector's operators adopt a global outlook, which is now driving the deterritorialisation of the digital environment (**García-Leiva**; **Albornoz**, 2017; **Lamkhede**; **Das**, 2019).

As global companies, platforms need to satisfy customers worldwide with their content. They achieve this goal mainly through two lines of action:

- Mainstream content, either original or licensed from third parties (mostly from the United States).
- Local content, anchored in each territory, which generates country-specific catalogues (**Lobato**; **Lotz**, 2020).

The importance acquired by local productions and their popularity beyond their territories of origin justifies the subject of this research, given that it has opened a breach in the traditional hegemony of Hollywood content as the main attraction for customers of these services. The phenomenon is particularly notable in Europe. In the field of VOD, policies to boost European audiovisual circulation were first introduced in 2005 (**García-Leiva**, 2016), albeit with little success. The change came about through the global SVOD services in the 2010s. This is confirmed by data from the *European Audiovisual Observatory* (2021), which show how subscription platform catalogues have played a key role in facilitating access to content from other territories among member states, which has, in turn, increased their circulation.

The relevance of *Netflix* as the subject of study in this article is fully justified. It is currently the sector leader as a VOD service people use to watch films and television series (**Jenner**, 2018), with 232 million subscribers in over 190 countries (2023). *Netflix* started creating original content in 2013 and the delocalisation in its production philosophy became evident in 2016, the year in which it completed its global expansion (**Brennan**, 2018). Since then, the company's investment in production has grown steadily year on year, given its firm conviction that there is a direct relationship between spending on content and growth in subscribers. According to figures from the *Statista* portal (2022), *Netflix* closed 2022 with an investment of 18 billion dollars, a billion more than in the previous year and almost double its investment five years earlier. In 2023, the company announced it was stabilising its spending on original production, as part of the austerity plan adopted due to the post-pandemic recession.

Netflix's investment in producing its content, known as *Netflix Originals*, has proved more advantageous than licensing third-party content (**Lotz**; **Havens**, 2016; **Wayne**, 2017; **Neira**; **Clares-Gavilán**; **Sánchez-Navarro**, 2021), its central business model in its first years of business as a direct-to-consumer service. The consolidation of *Netflix Originals* as an ongoing strategy in the company's operation (**Hidalgo-Marí**; **Segarra-Saavedra**; **Palomares-Sánchez**, 2020) is explained by several factors:

- It is cheaper: once production costs are covered, programmes continue to generate profits, while licences have a time limit and need to be renewed for their continued inclusion in the service content.
- It gives them greater freedom with regard to simultaneous worldwide premiers, growing their potential public and, by extension, their impact and popularity.
- It increases homogeneity in their per-country catalogue and a better understanding of audience reactions in different territories.
- It is the ideal vehicle for international promotion (**Jenner**, 2018; **Lobato**; **Lotz**, 2020).

Netflix sees local production not just as a tool to reach audiences in the regions of origin but also as a means of connecting to global audiences (**Kim**, 2022). By using different globalising techniques, local *Netflix Originals* obtain extraordinary

international circulation (**Fernández-Manzano**; **Neira**; **Clares-Gavilán**, 2016; **Shattuc**, 2020; **Neira**; **Clares-Gavilán**; **Sánchez-Navarro**, 2020), thereby confirming the fundamentally local nature of global tastes, as referred to in **Wayne** and **Castro** (2021).

The local-global pairing in terms of audiovisuals is not a new topic in the academic literature. Huertas-Bailén refers to it as:

> "specifically local content, typical of each country, each television station, each company, but which receives global treatment, considering above all an unlimited, universal audience, as in the past" (**Huertas-Bailén**, 2002).

 The recent rise in examples of this pairing (local content with a large international circulation), has been termed *glocal*. The term, a hybrid of "global" and "local", was popularised by the sociologist Roland Robertson and coined by Japanese economists to explain global marketing strategies implemented in their country. It implies creating products and services for a global market which are also adapted to local cultures (**Blatter**, 2013).

The glocal nature of *Netflix Originals* aligns perfectly with this premise. The productions are markedly local (in terms of such elements as the origin of the production, actors, locations, subject matter and language) and then globalised thanks to techniques and practices designed to reach audiences in other countries, a "network effect" that, as noted by **Cascajosa-Virino** (2018), is one of the main competitive advantages of the SVOD model. Their rise within the *Netflix* offer is largely due to the success of the strategy, which has led to a substantial increase in viewership. According to the *Netflix* co-CEO, Ted Sarandos, in statements made during the presentation of the results for the third quarter of 2022, viewing foreign-language content among platform users has increased threefold since *Netflix* started its original productions. He describes the origin of the idea of local production with a global outlook in the following way:

> "I started thinking about the impact of this growth and how we had within our grasp the chance to bring new storytellers from any part of the planet to everyone and that they could dictate how television and film would be made in the future" (*Netflix Investors*, 2022).

The success of this glocal strategy, based on production with a territorial focus (**Hidalgo-Marí**; **Segarra-Saavedra**; **Palomares-Sánchez**, 2020), combined with the demands arising from the 30% quota for European content, imposed on the catalogues of these services by *Directive (EU) 2018/1808* (*Unión Europea*, 2018) regarding audiovisual communication services, has encouraged other international direct-to-consumer platforms, such as *Prime Video*, *HBO Max* and *Disney+*, to replicate the strategy and turn to foreign-language production to strengthen their international positions. This situation further justifies the interest in this area of research, given its potential importance to the current audiovisual production model.

It is worth noting there was a drop in the platform's volume of original production, including the local sphere, in 2022, and more so in 2023. The post-pandemic economic downturn (causing subscription figures to fall), the delicate geopolitical situation in Eastern Europe (which has lowered growth forecasts in the region), market saturation due to the launch of new services, and new Wall Street directives with regard to valuing platforms (moving the focus of attention from the subscriber numbers to profits) has led to greater austerity in spending. According to estimates from the consultancy firm *Ampere Analysis*, the production budget for global players for 2023 will be 26.5$ billion, 14% up from the previous year. Although this is lower than the 7.2$ billion rise in 2021-2022, the importance platforms place on original content is still evident, despite a more cautious and selective approach to suit the more saturated streaming market (**Szalai**, 2023).

> Local-origin *Netflix Originals* obtain extraordinary international viewing figures thanks to the different globalising techniques executed by the company

2. Objectives and methodology

The international consolidation of global streaming platforms and the fact that they have all opted for producing original content has attracted the attention of the academic community in analysing the phenomenon. As Lobato and Lotz note,

> "*Netflix* is a fascinating object of study because it uses a new distribution technology and a previously uncommon business model and is disrupting established norms of international video distribution based on temporal and spatial windowing" (**Lobato**; **Lotz**, 2020).

The significant rise in local production, the efficacy of mechanisms to boost its popularity abroad and changes in users' consumption dynamics, with greater receptivity to non-Anglo-Saxon-origin content, all explain the interest of this research, whose starting point is the following hypothesis (H1):

The global popularity of local *Netflix* non-English-language productions beyond their territory of origin stems from a glocal-based strategy, executed through different lines of action in areas such as creation, audience prototyping, distribution, language, marketing, recommendation algorithms and social conversation.

In the field of local production, restricting the subject of analysis to fictional series was considered appropriate, given their relevance in terms of volume and their capacity to create audience loyalty (**Cascajosa-Virino**, 2018).

The hypothesis validation is centered on two key objectives:

(O1) Analysing original content promotion elements in the *Netflix* strategy. To do this, we will take as our reference the academic contributions by **Linares-Palomar** (2009) and **Herbera**, **Linares** and **Neira** (2015) on commonly used promotional and distribution strategies in the industry in both the preparation and launch phases.

(O2) Understanding how this strategy, applied to non-English-language series, succeeds in improving their *travelability*, a term coined by the consultancy firm *Parrot Analytics* (2018). This is an indicator measuring the ratio between demand for specific content in the original place of production and all other markets.

This article uses the case study method (**Yin**, 2009), which is justified by the fact that this is empirical research based on a real phenomenon, in a specific context and using different sources of evidence. It is especially appropriate for acquiring diagnostic competencies in a world of constantly changing markets and technologies (**Peña-Collazos**, 2009).

The holistic approach, using various sources of information to better understand the phenomenon analysed, is an inherent part of case studies. To this end, Table 1 shows the sources that were used to compile relevant data.

Table 1. Sources for data collection

Data source	Sample	Objective
Netflix Top 10	Hours viewed for non-English-language television programmes. Weeks in the top 10 most popular programmes. Number of countries in which the content has entered the top 10. Period considered: June 2021-December 2022.	To specify the positioning and volume of consumption of non-English-language television series. To quantify their popularity in terms of persistent viewership and travelability to countries other than the territory or origin.
Personal interviews with the content managers in Spain, Europe and Latam (*Netflix* and *HBO Max*). Interview with the Press and Communication Manager (*Netflix Spain*). (The interviews were managed through the communication and publicity departments of *Netflix* (LLYC) and *HBO Max Spain*).	Diego Ávalos (*Netflix Spain* VP of original content). Francisco Ramos (*Netflix Latam* VP of original content). Christina Sulebak (CEO of *HBO Max Europe*). Rut Rey, Senior Communications Manager (*Netflix Spain*).	To identify *Netflix*'s editorial line in selecting and carrying out projects in two territories (Spain and Latam). Opinion on the importance of local originals Editorial line of the competition (*HBO Max*) regarding local content. Official information on content dubbing and subtitling in *Netflix*.
Other external sources: statements by *Netflix* employees on professional forums, information from their official website and press releases by the company.	*Harvard Business Review* *Variety* *The Hollywood Reporter* *El País* *Business Insider* *Netflix Tech Blog* *Netflix Investors*	To identify a common discursive thread in statements by company executives since *Netflix* first started original production.

The *Netflix Top 10* website, the primary source for quantitative information for this study, is the main public and systematic reference source on the performance of the company's programmes.
https://www.netflix.com/tudum/top10

The information from the site, which is submitted to a yearly independent third-party audit, is gathered, and published in line with the following methodology:

- The lists provide series rankings of total hours viewed for each title.
- The rankings are divided into four categories (films and television programmes in English and non-English languages).
- For each title in the rankings, *Netflix Top 10* also gives the number of countries in which it has entered the respective lists of top 10 content.
- The data are measured weekly and updated every Tuesday.
- Each season of a series is calculated separately, and all are eligible for inclusion in the ranking.
- The figures are rounded to the nearest ten thousand for the final result to avoid distortions caused by fluctuations in Internet connectivity worldwide.
- The website historic data the website go back to the end of June 2021.

The process for obtaining information from in-depth interviews, the second source of information in this case study, is described in Table 2.

The academic and professional research literature on new audiovisual distribution models on the Internet (**Álvarez-Monzoncillo**, 2011; **Keating**, 2012; **Tryon**, 2013; **Cunningham**; **Silver**, 2013; **Holt**; **Sanson**, 2013; **Lotz**, 2014; 2018; **Landau**, 2016; **Lobato**, 2019; **Neira**, 2020) and television programming theory (**Contreras**; **Palacio**, 2001; **Gómez-Escalonilla**, 2003; **Bustamante**, 2004; **Arana**, 2011; **Izquierdo-Castillo**, 2016) helped establish the general parameters on how this

Table 2. In-depth interviews

Name and position of the interviewee	Objective of the interview	Date	Medium	Main contributions to the case study
Diego Ávalos (*Netflix Spain* VP of original content).	To learn about the company's editorial philosophy, especially with regard to local Spanish production, coinciding with the 5th anniversary of the launch of *Netflix* in Spain.	14/10/2020	Email	"It fills us with pride to see how that initial intuition, on how great stories can come from and reach anywhere, is now a reality." "Thrilling people all over the world with series such as *Valeria* or *Money Heist*, or films like *The Platform* or *The Paramedic*, shows that these are truly stories that unite us." "Our philosophy is to offer our members the best entertainment and give them control over what and how to watch it. This is still completely valid. Indeed, in the current context, we are more aware than ever of the strength of great stories in providing users with this window on the world, this connection with other realities." "Spain has an incredible talent base, in front of and behind the camera. Having an exceptional creative, acting, and technical ecosystem largely explains the great stories that are born in this country." "This country serves as a bridge between two continents: it is an enclave connecting Latin America and Europe, with a language that is creating ever more interest and is shared by 580 million people worldwide." "We invest in highly varied projects without guidelines or templates. We follow our intuition, investing in authentic stories is our only formula: there is no science behind what we do, there is creativity, dedication and, indeed, art."
Francisco Ramos (*Netflix Latam* VP of original content)	To learn about the company's editorial philosophy, especially with regard to original production in another territory (Latam).	24/09/2020	Video conference	"We are breaking down a consolidated barrier in which Spanish is for Spain, Mexican is for Mexico, and Uruguayan is for Uruguay." "Language connects us but that doesn't mean we are building a single culture." "The specificity and unique vision that each creator brings to this project is what makes it local but also universal. Without specificity we lose identity." "We have good competitors who are reaching the same understanding as us (with regard to local production)." "We have to empower local executives in each country so they can build local teams."
Christina Sulebak (CEO of *HBO Max Europe*)	To learn about the company's editorial philosophy with regard to local production.	25/10/2021	Personal interview	"We think globally but act locally." "Local tonality is what determines the best service for us."
Rut Rey (*Netflix* Senior Communications Manager)	To obtain official information on *Netflix* dubbing and subtitling.	18/03/2020	Email	*Netflix* subtitles into 37 languages and dubs into 34. In 2021, *Netflix* subtitled over 7 million minutes and dubbed over 5 million minutes.

type of direct-to-consumer services functions. The latter aspect was broadened with literature on programming, focussing specifically on the over-the-top market, providing a better understanding of common formulas for generating consumption flows in on-demand ecosystems (**Cox**, 2018; **Heredia-Ruiz**; **Quirós-Ramírez**; **Quiceno-Castañeda**, 2021; **Izquierdo-Castillo**; **Latorre-Lázaro**, 2022) in which the absence of programming means most viewership is the result of self-programming, to use the term in **Jenner** (2016). An audience-related literature review was also carried out on basic aspects such as methodology, trends and purposes within the media ecosystem (**Iglesias**, 1985; **McQuail**, 1992; **Huertas-Bailén**, 2002; **Morley**, 2003; **Gillespie**, 2007; **Napoli**, 2008). Finally, a broad literature review was conducted on *Netflix*, especially with regard to the use of big data and recommendation algorithms (**Morris**, 2015; **Gómez-Uribe**; **Hunt**, 2016; **Jenner**, 2016; **Hallinan**; **Stiphras**, 2016; **Fernández-Manzano**; **Neira**; **Clares-Gavilán**, 2016; **Iñigo-Daw**, 2017; **Jenner**, 2018; **Lamkhede**; **Das**, 2019; **Siles** *et al.*, 2019; **Shapiro**, 2020; **Shattuc**, 2020; **Shimpach**, 2020) for a deeper understanding of the company's mechanism to achieve greater programme efficiency, better-viewing statistics and larger audiences for their original products.

3. Personalisation and self-programming: how *Netflix* builds global audiences

The term "programming", inherent to television, covers a set of techniques that string programmes together to be broadcast and viewed simultaneously (**Arana**, 2011). Programming has two dimensions. The first one is strategic: creat-

ing value for the target public of the medium through the composition of the content or "macro-assembly" (**Bustamante**, 2004). The second has a brand dimension: configuring a channel's offer to create a unique identity to differentiate from the competition. As Izquierdo-Castillo and Latorre-Lázaro note,

> "OTT and linear television share the same needs that once justified the development of TV programming. In other words, they need to seduce and retain consumers, adapt the offer to their wishes, influence their viewing routines and also build an original discourse, a global expression as an enunciating entity with which to differentiate themselves from a competitive environment" (**Izquierdo-Castillo**; **Latorre-Lázaro**, 2022).

In this sense, the purpose of programming is to generate a programme flow that encourages audience contact with the medium for as long as possible. This task, which in television is performed by the programmer, has changed hands in the streaming platform environment, while the goal remains the same: intensifying audience attention as far as possible (**McQuail**, 1992).

Platforms have empowered users and placed them at the heart of the system (**Heredia-Ruiz**; **Quirós-Ramírez**; **Quiceno-Castañeda**, 2021), as they can build their programming from references provided by the streaming service. However, finding something to watch from the broad offer these services provide, most of which is completely unknown, is a major impediment to users obtaining the programming flow that fosters continuity of use. This flow is fundamental for the platform, as it is essential for retaining its customers.

Based on user-generated information, *Netflix* has identified a critical 90-second window, the average time the customer takes after opening *Netflix* before entering a "decision-fatigue" state that drastically reduces their likelihood of watching something (**Gómez-Uribe**; **Hunt**, 2016; **Fernández-Manzano**; **Neira**; **Clares-Gavilán**, 2016).

Algorithms play a key role in fostering flow and creating selections of relevant, personalised content. Their importance stems from audiovisual "platformisation" itself, which has replaced the traditional expert choice-based editorial logic with algorithmic curation (**Gillespie**, 2014). Today, algorithms determine content visibility (**Nieborg**; **Poell**, 2018) and have become the primary source of discovery in practically all companies that provide online content (**Morris**, 2015; **Lamkhede**; **Das**, 2019; **Shapiro**, 2020).

Netflix is the audiovisual paradigm for these models, based on personalised viewing practices and indexed and tagged programmes to help others configure their own media diet (**Álvarez-Monzoncillo**, 2011) also quoted as television self-programming (**Jenner**, 2016). This VOD service has become the benchmark in how it merges technology, the information it associates with content (metadata) and data from users' online viewing, in a complex alchemy of audiovisual pairing through algorithms.

Managing large volumes of data is what makes television flow possible in the context of streaming (**Heredia-Ruiz**; **Quirós-Ramírez**; **Quiceno-Castañeda**, 2021). *Netflix* crosses all the user data it monitors (such as type of content played and rejected, play characteristics, frequency and intensity, type of access device, pathways in the app and their location, among others) with a broad spectrum of metadata the company associates with content (such as whether it creates a good mood, involves difficult family relations, is "dark" and so on). The aim is to discover common patterns, i.e. common elements in the content the viewer watches (topics, genres, actors, subjective elements, etc.), and then generate recommendations based on these points of contact. Thus, around 80,000 micro-genres have been constructed which *Netflix* uses to index and present their personalised offer (**Madrigal**, 2014). The company performs a similar process for how the offer is presented visually (**Amat** *et al.*, 2018). As well as the metadata, the content is paired with a collection of images, which the algorithms select to present on the interface in a way the best matches the users' preferences.

Within *Netflix*, users are placed at the centre of a circular data flow or invisible computational processes, following Cox´s terminology (**Cox**, 2018) in which they are the starting point and target for the service logic. The system feeds off preferences traced from users' consumption which, thanks to the algorithms, is returned to them in the form of recommendations. Thus, the platform fights to gain users' attention, in which, in general, the time spent on certain content or channel is a determining factor (**McQuail**, 1992). The end goal is to increase viewing hours and engagement with the platform in an infinite commercial loop (**Hallinan**; **Stiphras**, 2016; **Siles** *et al.,* 2019). In achieving this, the content becomes malleable and modular in its design, informed by datafied user feedback and subject to constant review and recirculation (**Nieborg**; **Poell**, 2018).

The constant transformation in how content is presented, in this effort to adapt to users, means the attributes that define their creative identity, as conceived in the creator's mind, become diluted. For *Netflix*, content can adopt different forms and is configured over and over again, highlighting certain characteristics and hiding others, to match users' preferences (**Jenner**, 2018). In practice, this process means providing different doors onto the same content to increase contact points with the whole potential audience, instead of enclosing it in a single category. For instance, a user could enter the universe of the *Netflix Original Ozark* by genre (thriller or drama), specific characters (strong women, disadvantaged classes, morally ambiguous characters, analytical minds), universal concepts

> In *Netflix*, users lose their social characteristics and attributes and are given a new algorithmic identity, based on viewing preferences

(parent-child relations, good versus evil, revenge, the fight against adversity) or specific topics (drug smuggling, money laundering, extortion, gambling, mafia), among many others. Based on the customer's history, the company uses combinations of these attributes in the form of micro-genres and images it considers most appropriate for attracting the user's attention and producing the pairing. Thanks to this multifaceted vision of content and users, *Netflix* can increase the efficiency of its content (i.e. the ratio between the cost of production and the number of viewer hours it generates), as

> The fact that local content is capable of satisfying audiences in different countries explains not only its significance in the company's master plan, but also *Netflix*'s interest in international territories, where its competitive position is strengthened through a strategy without competitors at this scale

the programmes use different visual and conceptual stimuli to convince the user to press play and, consequently, end up watching it. The process also works in reverse, i.e. reducing uncertainty in production and licence acquisition decisions. Using the elements into which a programme is broken down, the platform can calculate whether there is a potential audience for it. To do this, it takes programmes that common metadata as a reference, quantifying the contacts they have had with platform customers (**Dye** *et al.*, 2020).

Despite the supposed neutrality of algorithms (*Netflix* has stated on several occasions that their recommendations are guided by the aim of providing users with what they want), there is no lack of voices in academia warning of the dangers inherent in the intervention of algorithms, which have become a cultural intermediary between supply and demand in this new model of the digital economy. As Van-Esler notes,

> "One of the main attractions of services like *Netflix* are its personalised algorithm-generated recommendations, in which a person's viewing habits are entered into a large matrix of data from other users to determine the content they will like most. In performing this process, the choice is clearly delimited to the television programmes and films the algorithm considers most appropriate" (**Van-Esler**, 2021).

The term "cultural conformity" is also mentioned (**Hallinan**; **Stiphras**, 2016), as the algorithm provides constant reaffirmation of what we already like, rather than incentivising discovery to generate different tastes. Furthermore, the system has clear implications for how our preferences are constructed, as it prioritises the latter, displacing other traditional standards, such as quality and diversity (**Morris**, 2015).

4. Reverse audience engineering: taste communities

The international consolidation of *Netflix* with a type of programming that includes major investment in local production is only possible largely thanks to how they understand and manage the customer base. The key lies in how to mine their audiences, based on audiovisual preferences rather than demographics or geographical origin.

The advantages of understanding and mining audiences with this mentality were shown in *Netflix Prize*, a competition organised by the company in 2006 to improve the precision of the recommendation algorithm. The work of the *Pragmatic Theory* team, one of the winning companies, demonstrated that traditional information such as sex, age and ethnic origin was not enough to capture those subtle but relevant elements that influence people's decisions with regard to a particular cultural product (**Hallinan**; **Stiphras**, 2016).

At first, *Netflix* operated as a multinational with branches in different territories and classified its audience by basic demographic characteristics. The transition to a preference-built audience is first mentioned in 2016, in a *Netflix* press release explaining how a global approach to recommendations was carried out (**Gómez-Uribe**, 2016). The expression "taste communities" was used there referring to groups of people based on shared audiovisual preferences. This new criterion marked a profoundly significant transition for the future of the company, switching from national audiences (one for each territory in which the company operated) to working with a large global audience, subject to additions and removals based on tastes (**Iñigo-Daw**, 2017; **Shimpach**, 2020; **Neira**; **Clares-Gavilán**; **Sánchez-Navarro**, 2020). *Netflix* has publicly stated the estimated number of taste communities (over 2,000) and the average number to which a user belongs (from 3 to 4), but little else is known about their composition and operation (**Shattuc**, 2020). Taste communities are artificially constructed user groupings based on shared audiovisual preferences, information the system obtains from their viewing patterns. In *Netflix*, these groups include individuals from different geographical locations, as the binding element is taste, not the origin of the production or its cultural connection to the user, which is no longer relevant. The service has produced a strategy that blurs the barriers these two components might raise between customers and content. In *Netflix*, users lose their social characteristics and attributes and are given a new algorithmic identity, based on viewing preferences, which the system understands as a statistically based concept and the result of market research processes (**Cheney-Lippold**, 2011).

As with content, for *Netflix* taste has several layers (**Iñigo-Daw**, 2017) and can be broken down into an infinite number of attributes, then repackaged and personalised to adapt to the interests the user has shown. In the end, what the company is looking for is new entry flows into programming, a practice similar to linear television: it assumes that a spectator who likes a certain programme will tend to accommodate similar ones (**Jenner**, 2018). As Shapiro notes,

> "This gesture amplifies neoliberal competition because as these clusters are formed based on proprietary algo-rithms, viewers have no sense of how their microscopic consumption choices relate to anyone else's" (**Shapiro**, 2020).

Such post-demographic profiling, to use the term in **Rogers** (2013), has enabled *Netflix* to develop a truly international strategy by broadening the entry data (collecting information by territory but returning it to customers globally). It has also helped its configuration as television and a transnational brand, changing the logic implicit in the production and distribution of media products, which now also target a transnational audience (**González-Bernal**; **Roncallo-Dow**, 2015; **Jenner**, 2018; **Siles** *et al.*, 2019; **Lobato**; **Lotz**, 2020).

5. Glocal content strategy

Netflix is a good example of the switch to algorithmic logic in production and distribution strategies (**Nieborg**; **Poell**, 2018), closely aligned to obtain the largest audience possible for their original content. Indeed, how *Netflix* mines its audiences and recommends its content has enabled a growing number of local non-English-language productions to be well received beyond their local markets of origin. This also tends to generate a domino effect: global popularity of local content operates as a dragnet for similar content, as the metadata will be "rewarded" by the recommendation algorithms and show other content sharing the same metadata to the same audiences.

This global-local attraction (**Bielby**; **Harrington**, 2008), thanks to the company's processes, means that dozens of local productions have obtained good, or even better, figures in international territories than in their place of origin. For in-stance, the Brazilian production *3%* (2016) obtained 50% of its total audience outside Brazil and the German *Dark* (2017) had a 90% non-German audience and appeared in the *Top 10* most viewed programmes in 136 countries (**Manjoo**, 2019). It is worth noting that one of the major achievements of glocal content is that it is eroding the lack of permeability for foreign-language content among viewers in the United States. As **Limov** (2020) notes, audiences in the US now have unprecedented levels of access to foreign content (thanks to global platforms that produce and acquire locally) which are facilitating new cultural affinities.

As shown in table 3, the popularity of non-English-language content in *Netflix* is irrefutable. Taking the information re-leased by the company on its *Netflix Top 10* website between June 2021 and December 2022, English-language television series obtained a total of 26,389,780,000 hours while non-English-language series provided 16,297,240,000 hours to the total. This means that, during the 19-month period analysed, television series in languages other than English provided 38% of the most popular programmes, based on hours viewed.

Table 3. Most popular glocal shows based on total hours viewed

TV shows (non-english)	Hours viewed (total)	# Weeks in 10 (accumulated)
Squid Game: Season 1	2.289.500.000	20
Money Heist: Part 5	905.230.000	14
Café con aroma de mujer: Season 1	813.480.000	28
Extraordinary Attorney Woo: Season 1	662.090.000	21
All of Us Are Dead: Season 1	659.510.000	11
The Queen of Flow: Season 2	463.470.000	16
Hometown Cha-Cha-Cha: Season 1	300.580.000	16
Yo soy Betty, la fea: Season 1	297.560.000	27
Business Proposal: Season 1	279.110.000	13
The Marked Heart: Season 1	272.750.000	7
Til Money Do Us Part: Season 1	269.260.000	7
Alchemy of Souls: Season 1	239.720.000	15
Newly Rich, Newly Poor: Season 1	201.120.000	13
My Name: Season 1	194.140.000	5
Carinha de Anjo: Season 1	180.950.000	15
High Heat: Season 1	178.860.000	6
The Five Juanas: Season 1	177.850.000	6
The Cook of Castamar: Season 1	173.470.000	8
Elite: Season 5	172.640.000	5
Twenty Five Twenty One: Season 1	171.610.000	10

Data: *Netflix Top 10*

Table 4. Glocal content travelability based on presence in top 10 per country

TV Shows (non-english)	Number of countries (presence in *Top 10*)
Squid Game	94
All of Us Are Dead	94
Money Heist	93
My Name	91
The Marked Heart	81
The Five Juanas	78
Elite	76
The Cook of Castamar	75
High Heat	59
Business Proposal	58
Extraordinary Attorney Woo	57
Alchemy of Souls	41
Hometown Cha-Cha-Cha	40
Twenty Five Twenty One	33
The Queen of Flow	31
Café con aroma de mujer	19
Newly Rich, Newly Poor	19
Til Money Do Us Part	18
Yo soy Betty, la fea	16
Carinha de Anjo	2

Data: *Netflix Top 10*

The travelability rate is just as interesting. As shown in table 4, the data provided by the *Netflix Top 10* website show that the 20 most popular non-English-language television series between June 2021 and December 2022 travelled to an average of 53.75 countries. The number of countries to which content travels has become a measure of global popularity for the company and a top order promotional element.

The glocal concept has become a constant in the discourse of *Netflix* content managers. In an interview with *Vanity Fair*, Bela Bajaria, the Chief Content Officer at *Netflix*, highlighted that the chief value of the glocal concept is the diversity it brings to the global market, as it allows *Netflix* to export around the world

> "lots of different kinds of lives reflected on-screen, and having these stories told in that way, and people who look and speak in different languages" (**Littleton**, 2020).

In much the same vein, Francisco Ramos, *Netflix Latam* Vice-President of *Original Content*, in statements to *Ventana Sur*, highlighted that having production from all parts of the world is a major advantage for the company (**Lang**, 2020).

The fact that local content is capable of satisfying audiences in different countries explains not only its significance in the company's master plan but also *Netflix*'s interest in international territories, where its competitive position is strengthened through a strategy without competitors at this scale. In this sense, glocal content helps achieve various goals (**Jenner**, 2018; **Shatucc**, 2020; **Lobato**; **Lotz**, 2020):

- Consolidating its leadership position outside the USA.
- Optimising investment, as production costs are lower in these territories, and many have a network of highly beneficial tax incentives.
- Boosting local creative prestige by opening production centres in territories that are the source of the company's great glocal hits. This is the case of the *Netflix* production hub in Madrid, which opened in 2019 after the success of *Money Heist* and which recently started enlarging its facilities to become *Netflix*'s largest studio in the EU.
- Reinforcing its identity traits, thanks to a unique offer that has managed to open a breach in the major catalogues of the overwhelmingly Anglo-Saxon tradition.
- Integrating into the local audiovisual industry. Investing in the creative fabric of each country works as a public relations campaign to combat constant accusations of lack of diversity in the stories it funds.

A key aspect for understanding how so much local content can become internationally popular is the globalisation of distribution. *Netflix Originals* premier globally, thus concentrating viewership, while *Netflix* connects taste communities to specific content elements regardless of their location. If one also considers the Internet factor, which whereby customers use the technology to expand their social contacts and connect globally (**Lull**, 2021), the implications are extraordinary. *Netflix* has become an echo chamber with a clear impact: viewership is concentrated, conversations start to flow, algorithms reward popularity leading to more views, and all this noise functions as a powerful claim to attract more customers.

6. Techniques to boost content *travelability*

The audiovisual product value chain is organised into a series of strategies, rolled out at different stages, aimed not only at obtaining market knowledge but also attracting the public. As **Linares** (2009) notes, despite the complexity and disruptions caused by digitisation, the process has maintained a stable structure for decades.

In the project preparation phase, the so-called initial sub-phase plays a key role in clearly identifying the potential public and market. In the case of *Netflix*, it has helped identify three key elements for testing the working hypothesis (H1): how production and development decisions are made, how audience prototyping is conducted and the distribution strategy**.** In the launch phase, special emphasis is placed on activities aimed at capturing and attracting the public, included in the sub-phases of reputation, attraction and memory. Elements such as marketing and promotion strategies, use of recommendation algorithms, popularity rankings and social conversation clearly fit into this phase. Given that this study focuses on the global *travelability* of local *Netflix* content, which involves different sources and target languages, incorporating dubbing and subtitling is considered pertinent as an eighth element in this strategy (O1).

As shown below, *Netflix*'s actions in these eight work areas to boost content travelability involve different fields of action (local and/or global) (O2).

Table 5. Actions carried out by *Netflix* to boost content travelability and fields of implementation

Glocal strategy	Field	
Creation and production	Local	
Audience profiling		Global
Distribution strategy		Global
Languages (dubbing and subtitling)	Local	
Marketing and promotion	Local	Global
Recommendation algorithms		Global
Popularity rankings	Local	
Social conversation	Local	Global

Creation and production (local)

The boost to local content with a global outreach starts with the decision on whether to give the project the green light. The company has appointed executives who make these decision in each territory and in language (**Low**, 2020). The aim is to make faster, better-grounded decisions. It also aims to ensure there is knowledge on the ground to validate the storytelling, always bearing in mind the elements that give content travelability to other countries. Repeating projects working with the same production companies in each territory confirms that *Netflix* tends to renew its confidence in the architects of their global successes (creators and producers). In Spain, for instance, *Netflix* has filmed in all the autonomous communities through 40 national production companies, generating 70 new local productions from the start of original production in Spain to 2022 (**Neira**, 2022).

Audience prototyping (global)

Projects are also assessed by the size of their potential audience, estimated by considering the content attributes (genres, actors, format, themes, metadata, etc.) and the interests of the platform taste communities, regardless of their geographic location. As members of the *Netflix* data science team explained, such analysis can even include how the audience will be spread geographically and determine, for instance, which country or countries will drive the programme initial audience (so-called early watchers). Managing this information beforehand greatly simplifies the subsequent promotion work, as it can be scaled to the territories the data suggest are worth reinforcing first (**Dye** *et al.*, 2020).

Distribution strategy (global)

The boost to glocal content is also the result of an original distribution strategy. Simultaneous premiers of *Netflix Originals* in all 190 countries where the service is available helps create global cohesion among territorial audiences (**Jenner**, 2018). This multiplies the popularity of the content in taste community digital exchange spaces, such as social media, check-in apps (i.e. *JustWatch*), thereby spreading the phenomenon more homogenously around the world. *https://www.justwatch.com/es/series*

As **Limov** (2020) explains, accessibility (the content is available, can be discovered and is attractive) combined with cultural affinity (audiences are now more mature and not put off by programmes in a foreign language) explain this greater willingness to discover new content.

Languages (local)

As **Jenner** (2018) points out, translation and dubbing permits greater integration into the target national culture. Hence it may be concluded that language is another element contributing significantly to promoting glocal content. Such language-related practices provide *Netflix* with "domesticated" content which makes the service more attractive to national audiences (**Wayne**; **Castro**, 2021).

Currently, *Netflix* subtitles in 37 languages and dubs into 34. In 2021 alone, *Netflix* subtitled 7 million minutes and dubbed 5 million. According to *Netflix*, ensuring high-quality dubbing and accurate adaptation of subtitles is essential for faithfully reproducing the creative and cultural essence of content and, above all, connecting with users. In this, there is a point of contact with the local community, as hiring actors in each country of origin helps adapt the content to incorporate cultural subtleties much more successfully than through translation and subtitling alone (**Barra**, 2013). Furthermore, the company has a global network of specialist partners to obtain optimum quality standards, while large amounts of resources go to understanding, contextualising and assessing all materials and content. Finally, the company provides various channels to receive feedback and comments from users.

Marketing and promotion (global and local)

The proximity factor in the *Netflix* communication strategy has caught the attention of the academic community, especially in recent years. As **Fernández-Gómez**, **Feijoo** and **Martín-Quevedo** (2022) note, one can detect products to which *Netflix* gives a high degree of cultural proximity in countries as diverse as Mexico, Brazil, Israel and South Korea.
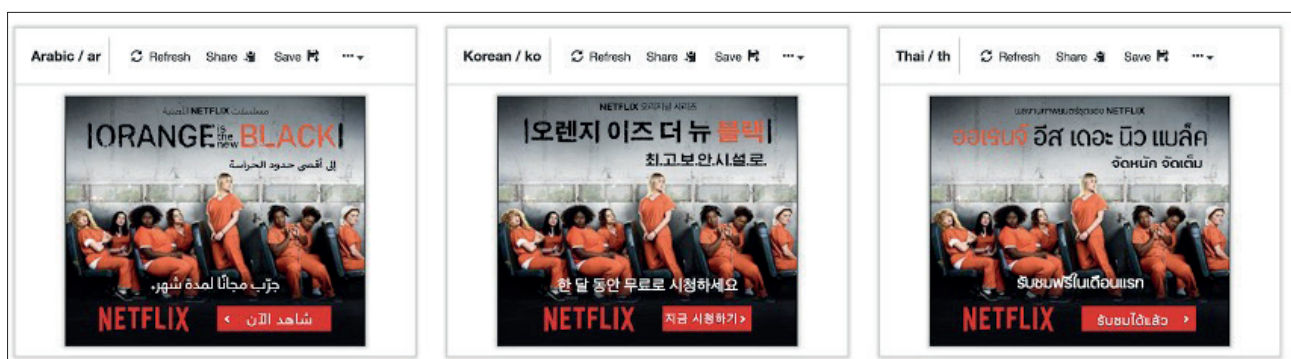

Image 1. Adaptation of *Netflix Original* artwork to different territories.
Source: *Netflix Tech Blog* (*https://netflixtechblog.com*).

Images 2, 3, 4 and 5. Stills from *Stranger Things* promotional videos in Brazil, Mexico, Colombia and Spain.

According to **Parulekar** and **Krishnan** (2018), the aim is to "create demand" for original content, to which end the creative and technology departments work hand in hand. Promoting *Netflix Originals* in so many languages, with different concepts and messages, involves millions of marketing elements, a process that is largely automated and involves large-scale campaigns adapted to different territories.

In addition, *Netflix* employs a content localisation and quality control officer whose team work to localise their product strategy, which involves working with translators to match key names and sentences to the local environment (**Shattuc**, 2020). Promotional campaigns, be they for English or non-English content, seek to bring the global product closer to each territory by adapting it to the cultural conventions of each country (**Neira**; **Clares-Gavilán**; **Sánchez-Navarro**, 2020). This results in specific actions that combine daily activity in the company's social media accounts in each territory, acting as amplifiers for different local characteristics in its global brand.

By way of example, the marketing for the second season of *Stranger Things* involved a common thread of 1980s icons in different territories, such as Leticia Sabater in Spain, Xuxa in Brazil, a famous cartoon advert for sweets for promotion in Colombia and "La Chilindrina", a popular character from the series *El Chavo del Ocho*, in the promotion in Mexico.

Recommendation algorithms (global)

While local marketing and promotion adapt content to the local characteristics of the territory outside the platform (on the Internet, in the street, on social media, etc.), the algorithms work to bring the content to as broad an audience as possible directly through the platform. In practice, this produces "mutual domestication" between users and recommendations (**Siles** *et al*., 2019) through mechanisms to ensure the content is viewed. The system also works globally by integrating local content into personalised categories and interfaces to connect to as many potential viewers as possible.

Popularity rankings (local)

Another aspect that provides special visibility to local content are the lists of the most popular programmes by country, a highly efficient selection for boosting plays (**Neira**; **Clares-Gavilán**; **Sánchez-Navarro**, 2021). When content enters the *Top 10* most watched content in a country, this reinforces visibility and creates focuses for popularity. For many global phenomena, the initial spark comes from such local blooming of popularity.

Conversation (global and local)

Viewer communication rituals have a major influence on increasing receptiveness to local content. The release formulas (all at once and at weekends) seek integration into users' routines to increase the chances of concentrating viewership, thereby generating a large volume of conversation. Another factor that helps boost the glocal concept is conversations transcending the private sphere and entering users' public discourse, creating a sensation of familiar solidarity (**Lull**, 2021). Such online activism helps integrate the content in question into the digital ecosystem much more widely and creating highly valuable recommendations, beyond the company's official promotion.

> Promotional campaigns, for both English and non-English content, seek to bring the global product closer to each territory by adapting it to a country's cultural conventions

7. Conclusions

This research focusses on identifying and analysing strategies that help local, non-English-language *Netflix* television series obtain huge global popularity (O1 and O2), to ascertain whether this phenomenon is the result of actions in different work areas, some global and others local, which may be described as a glocal strategy (H1).

The results of the research confirm this hypothesis. Interesting conclusions can be drawn using information from the *Netflix Top 10*, the website where the company provides weekly information on total viewer hours for its 10 most popular programmes (English and non-English-language films and television series). With regard to the object of study in this article (fictional series), the total share for non-English-language television series was 38% of the total for the most popular *Netflix* programmes in the period June 2021-December 2022. Furthermore, content travelled to an average of 53 countries beyond the country of origin. From these figures, it may be concluded that the company is able to generate international audiences for their local foreign-language content.

These results open up new, complementary lines of research to studies that previously exposed the lack of transparency in streaming platforms and the bias their data impose on academic research (**Quintas-Froufe**; **González-Neira**, 2016; **García-Leiva**; **Albornoz**, 2017; **González-Neira**; **Quintas-Froufe**; **Gallardo-Camacho**, 2020), given that the data for this study, from the *Netflix Top 10* website, undergoes an annual external and independent audit.

The travelability of local content stems from the various factors and lines of action employed by the company:

- Access and exposure to content in over 190 countries and 232 million customers. This facilitates simultaneous global distribution, as opposed to the international market-by-market sales-based distribution system.
- The way recommendations are made, based on preferences and tastes, rather than demographic profile or place of origin. Algorithms multiply contact points between content and viewer, automatically displaying all content that matches users' preferences, regardless of geographic or demographic factors.
- Specific local or global work dynamics, as required. The local aspect brings content closer to the territory and has a specific weight in areas such as contracting teams to carry out production, dubbing and subtitling and promotion. By contrast, the global aspect boosts popularity in international territories thanks to actions in key areas such as distribution (all at once and worldwide, thereby creating global cohesion among all territorial audiences), the recommendation system (based on audiovisual preferences and ignoring geographic barriers) and social conversation (which circulates and leaves its mark globally, although it is coordinated locally).

The good global reception for non-English-language series reaffirms *Netflix* with regard to the enormous potential of local storytelling to satisfy diverse audiences and take on Hollywood with different narrative codes from those that have dominated the audiovisual market for decades. With regard to future research, it would be worthwhile conducting more case studies on the weight of local content with a global reach in the catalogues of other global SVOD platforms and how this trend will affect the audiovisual diet of western viewers.

> " The good global reception for non-English-language series reaffirms *Netflix* on the enormous potential of local storytelling to satisfy diverse audiences and take on Hollywood with different narrative codes from those that have dominated the audiovisual market for decade "

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