

# The 'Netflix Original' and What It Means for the Production of European Television Content

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# Aims and objectives

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- This study's goal is to analyse Netflix Original investment in European scripted series and examine their implications for the European market
  - There are no budget data available
  - Netflix full originals are used as a proxy to look at investment patterns
  - Netflix's presence and the deals they strike impact the European production landscape

# Research methods

- Quantitative mapping of Netflix investments in European scripted series
  - Countries part of the continent
  - 1 January 2012 – 31 December 2020
  - 176 titles
  - 1886 hours of content
- Focus on
  - chronological evolution based on the number of titles labelled as originals
  - the total volume based on minutes produced of European productions
  - country diversity
  - the collaborations Netflix is forging
  - the predominant genres of Netflix Originals

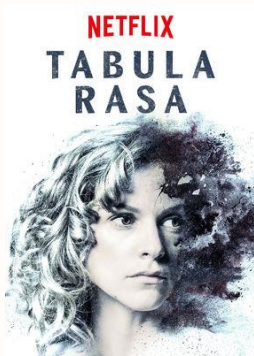
# Findings

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- What is a Netflix Original?
  - exclusive titles distributed in territories
  - most present in catalogues
  
- 4 types of investments based on
  - listing of production companies
  - release dates
  - production partners

# 4 types of investment

## Licensed originals



## Continuation originals



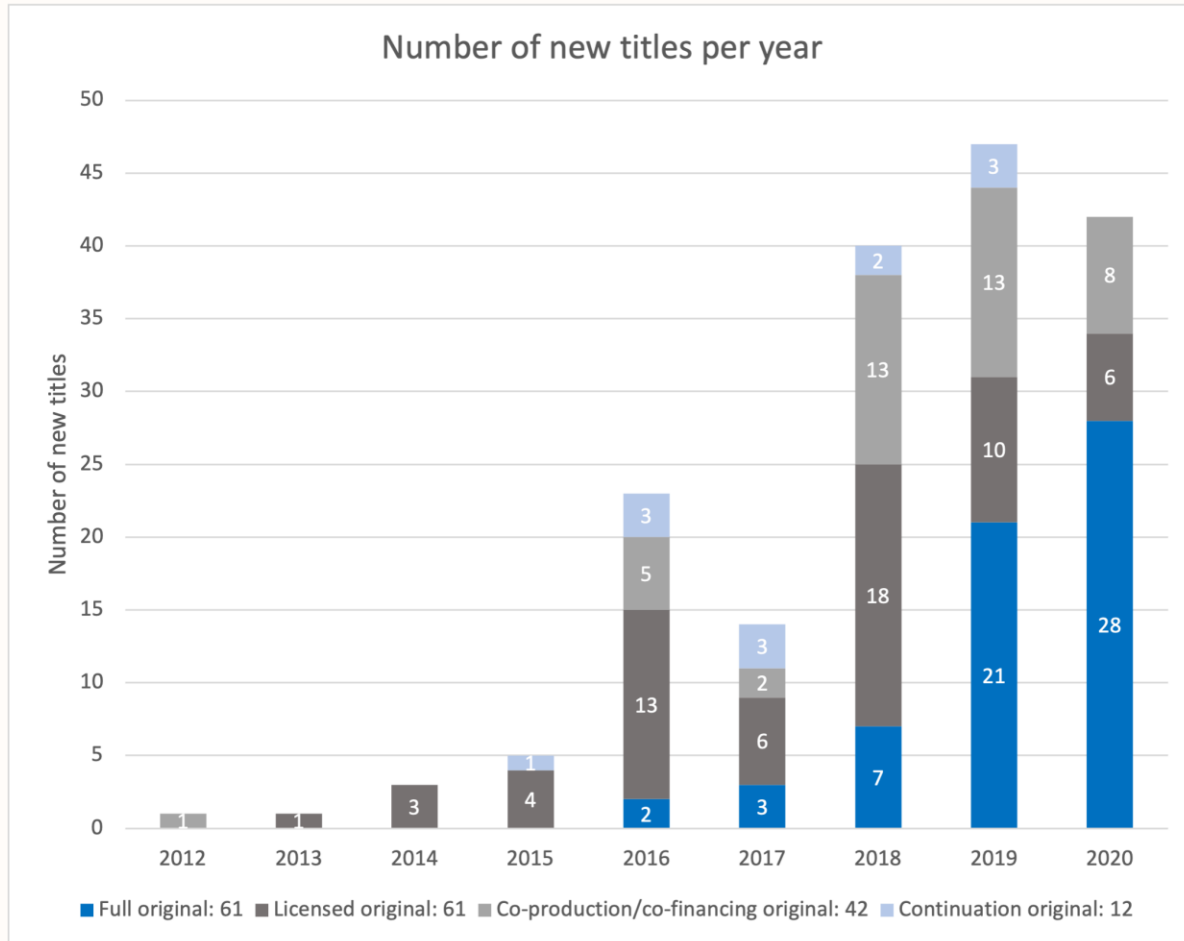
## Co-production/co-financing originals



## Full originals

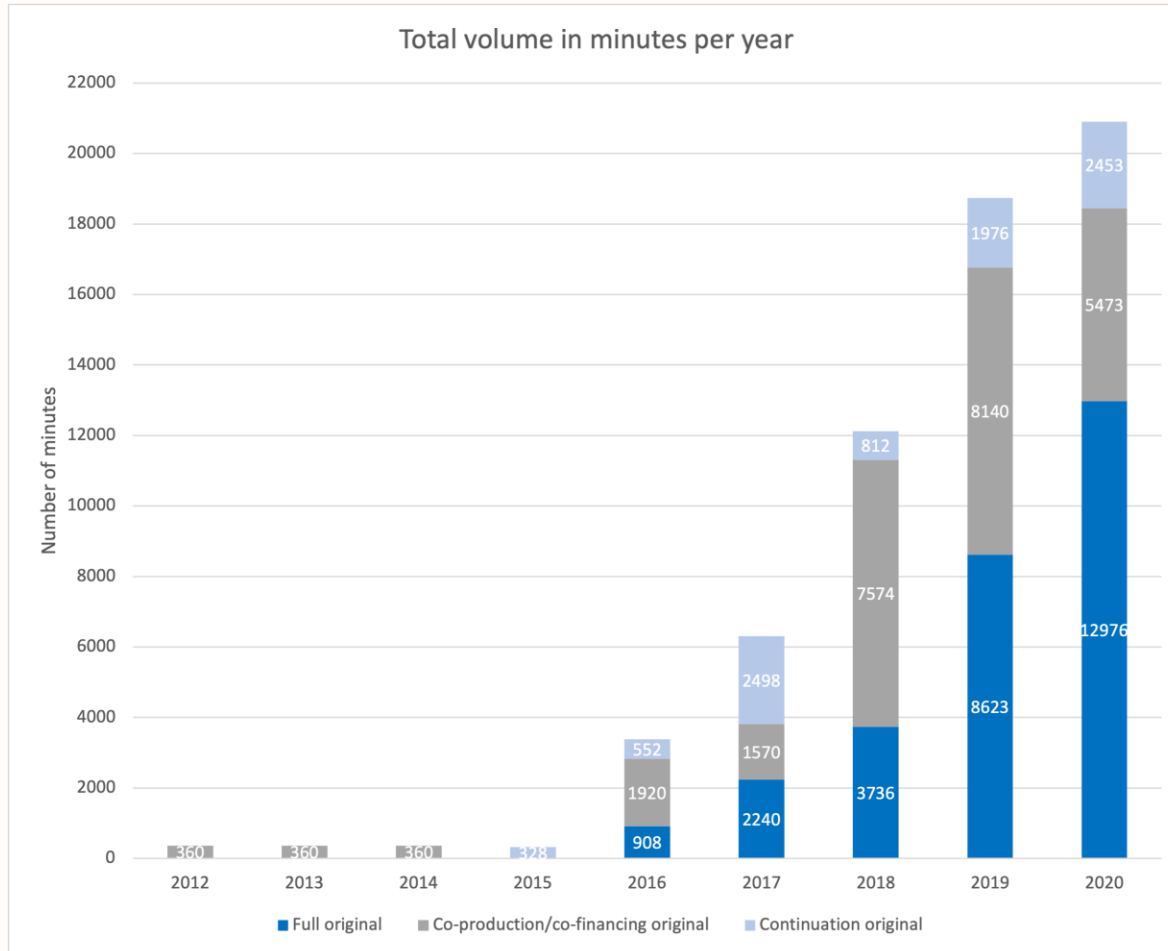


# Findings



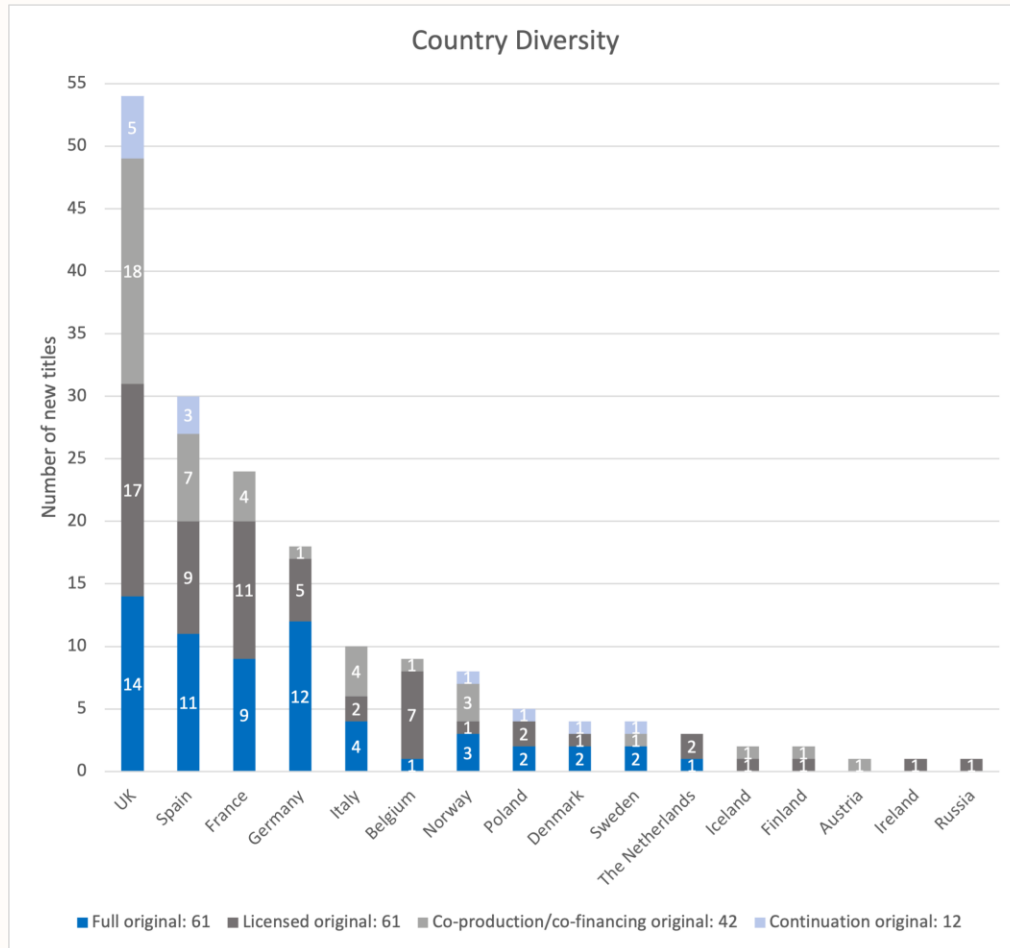
- Netflix made use of licensed and continuation deals to enter the European market with local offerings and limited investment and risk
- Full originals are preferred because of the growing importance of exclusive rights – in the context of the ‘Streaming Wars’
- Decline in all the other 3 types
- Covid-19 led to a lower number of released Originals in 2020 than we initially predicted

# Findings



- Despite the lower number of Originals in 2020, the number of minutes Netflix invested in is higher than in 2019
- In 2019 the volume of Full originals overtakes the co-production/co-financing originals
- Continuation originals see a slight increase

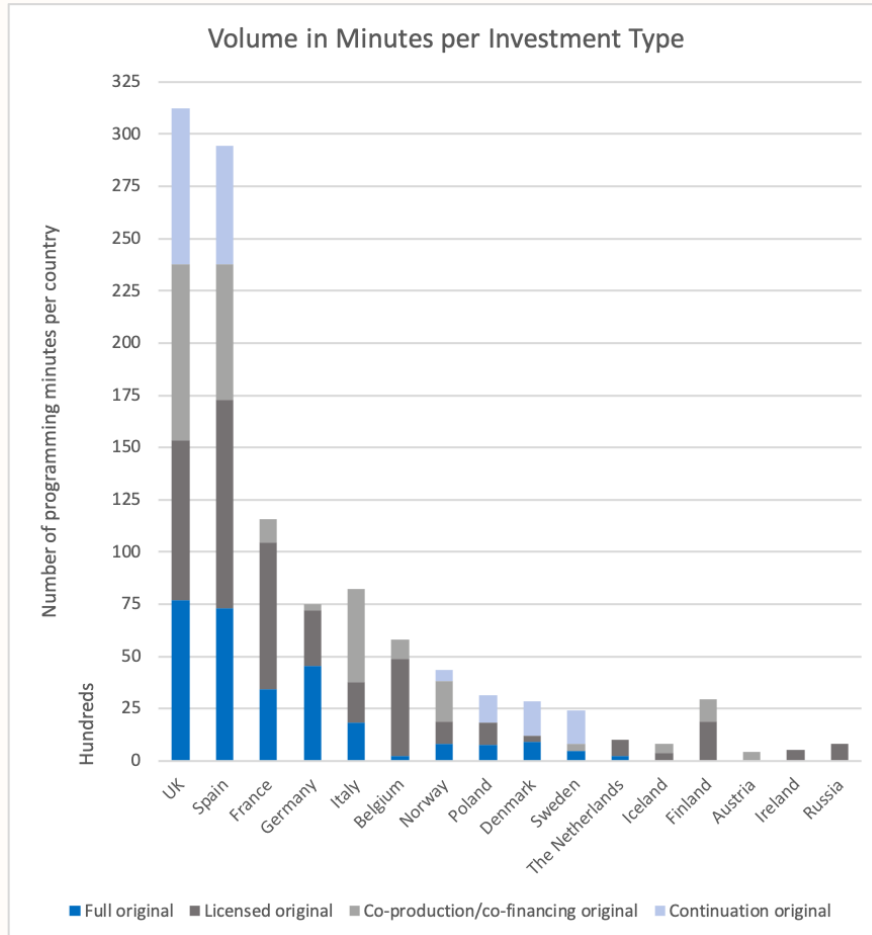
# Findings



- 80% 'Big Five' – large language markets
- Overall, 30% in the UK
- Small countries receive less investments
- Belgium has the highest number of titles
- Co-production/co-financing are more common in smaller markets
- Eastern and Central Europe less investments
- Expansion in Poland and Russia

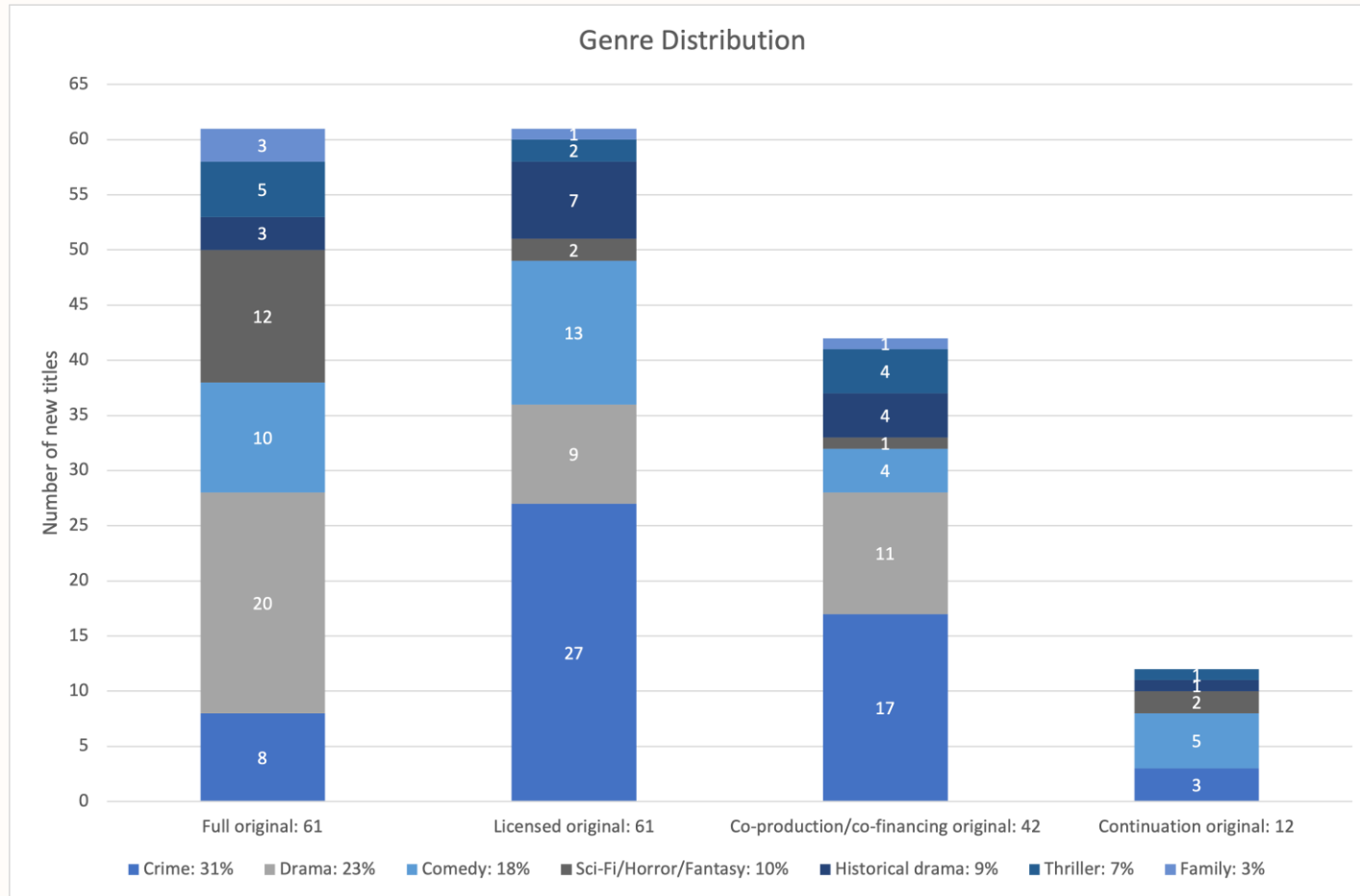


# Findings



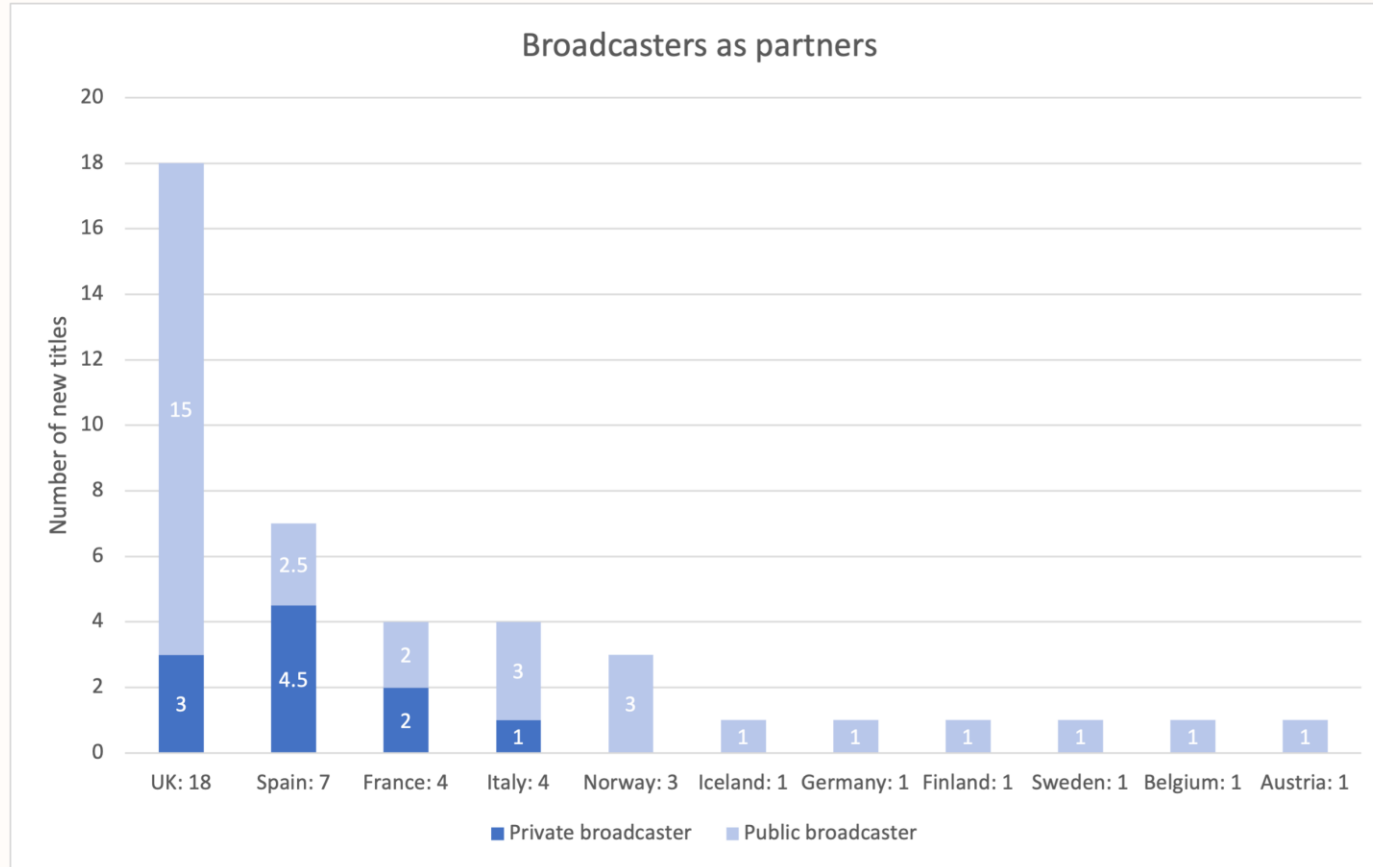
- UK has almost double the number of titles when compared to Spain, the volume in minutes is rather similar
- This discrepancy is due to the format they chose for each market
- Huge discrepancies in the actual volume between UK and Spain and the rest

# Findings



- Very diverse across all four investment types
- Preference for crime, drama, comedy
- Drama is preferred for Full originals
- Crime is preferred for Licensed originals and Co-production/co-financing originals
- Comedy is preferred for Continuation deals

# Findings



- 80% public broadcasters
- Same partners are preferred



# Key lessons

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- The analysis shows a significant uptake of Netflix investment in European content
- The 'Big Five' receive the highest investments both in titles and in minutes
- PSBs are Netflix's preferred partners
- Investments are not restricted by genre
- Clear shift from licenced content to full Netflix Originals to retain all rights
- Investment in pan-European productions is rare to non-existent

# Future research

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- The shift towards full Netflix Originals and the platform's increasing 'physical' presence in Europe, through offices and production houses, signal its commitment to establish itself as a key producer of European content
- Future research into the ramifications of each type of investment strategy would not only deepen our understanding of Netflix's model, but it would also prepare European markets for the soaring battle for exclusive rights, in the context of the imminent 'Streaming Wars'

# Thank you for your attention!

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