



Kaunas University of Technology
Faculty of Social Sciences, Arts and Humanities

Media Transformation in the Age of Netflix: User Interface and User Experience Trends of SVOD Platforms

Master's Final Degree Project

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Digital Culture (6211NX032)

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Summary

In 2007, the US-based DVD-by-mail service Netflix started offering digital streaming service. In 2016, the company completed a mass global expansion campaign, becoming available in nearly 200 territories across the globe. The company started producing more foreign-language content on equal terms with its anglophone productions. The expansion caused a shift among consumers that embraced streaming as a new personalised way to interact with content. The ripple effect led to the development of new streaming platforms and the transition from traditional analogue television age to the new era of SVOD platforms. As other American streaming platforms started their expansion projects, the regional broadcasting networks developed services that allow users to cater their content while maintaining access to the digitalised television.

The following research explores how Netflix's global expansion and subscription video on demand (SVOD) streaming model triggered a new media transformation. Theories of globalisation and glocality, network society, and media transformation are applied to the context of Netflix's development. Furthermore, the use of algorithms and user interface/user experience design are explored. To determine the direct influence that Netflix has had on media distribution outside of the US market, three digital television and SVOD platforms – NRK in Norway, RTL+ in Germany, and Go3 in the Baltic States – are analysed based on their content and development strategies. Netflix's user interface is seen as the benchmark of digital streaming platforms, and the research analyses how regional market competitors expand on the services and capabilities of the platforms. It is determined that Netflix had significant impact on the user interface and user experience provided by its competitor platforms. Furthermore, an uneven distribution of local recognition is noted. While Netflix is localised in the Norwegian and German markets and offers some productions, the Baltic region has been overlooked. Netflix does not offer any original content from said region and the user interface has not been localised in the Lithuanian, Latvian, or Estonian languages.

Despite Netflix's influence, each of the three competing platforms have shown to offer unique services unavailable on the American platform, such as linear TV streaming or transactional video on demand. It is finally determined that while Netflix remains an impactful platform for the processes of media transformation, other platforms may withstand against it in their respective markets and even expand into new territories with a wider range of services. Finally, the process of media transformation triggered by Netflix's development of the SVOD platform is considered to be ongoing. The analysis has revealed that a hybridisation of linear television and SVOD services can be observed, leading to a new type in media consumption. It is unlikely that television has been defeated by Netflix. Instead, it has been adapting to fit the mold of the new digital model of entertainment.

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Santrauka

2007 m. amerikiečių įmonė Netflix, iki tol užsiėmusi DVD nuomos siunta į namus savo klientams pradėjo siūlyti naują paslaugą – srautines transliacijas. 2016 m. ši įmonė įvykdė didelio masto tarptautinės plėtros projektą ir Netflix vaizdo formato transliacijų internetu paslauga tapo prieinama beveik 200 teritorijų visame pasaulyje. Įmonė pradėjo kurti ir siūlyti daugiau turinio užsienio kalbomis, kuris buvo rekomenduojamas vartotojams kartu su anglakalbiu turiniu. Šios plėtros bangos paveikti vartotojai pradėjo srautinėmis transliacijomis naudotis kaip asmeniškai kuruotu būdu žiūrėti turinį. Šio proceso dėka buvo pradėta kurti naujas srautinių transliacijų platformas. Amerikiečių platformos, sekdamos Netflix pavyzdžiu, pradėjo tiekti savo paslaugas užsienio rinkose. Tuo tarpu regioniniai transliacijų tinklai steigė skaitmenines paslaugas, leidžiančias vartotojams žiūrėti turinį jiems patogiu būdu bei turėti prieigą prie suskaitmenintos tradicinės televizijos.

Šiuo tyrimu norima nustatyti, kokią įtaką Netflix globali plėtra bei mokamų srautinių transliacijų modelis turėjo naujos medijų transformacijos bangos pradžiai. Aptariamos globalizacijos ir glokalizacijos teorijos, tinklaveikos visuomenės principai bei medijų transformacijos idėjos. Be to, aptariamas Netflix algoritmų kultūros vystymas bei vartotojo sąsajos ir vartotojo patirties kūrimas. Norint nustatyti, kokią įtaką Netflix platforma turėjo medijų transliacijoms už JAV rinkos ribų, buvo analizuojamos trys Europos skaitmeninės televizijos ir srautinių transliacijų paslaugų platformos – Norvegijos NRK, Vokietijos RTL+ bei Baltijos šalių Go3. Analizėje buvo remiamasi platformų turinio platinimo bei plėtros strategijomis. Netflix vartotojo sąsaja vertinama kaip standartas kitoms srautinių transliacijų platformoms. Tyrime apžvelgiama, kaip vietinių rinkų platformos plečia savo paslaugas bei galimybes. Nustatyta, jog Netflix turėjo žymią įtaką konkurentų platformų vartotojo sąsajų bei vartotojo patirties kūrimui. Be to, pastebimas netolygus turinio prieinamumo vietinėms rinkoms pasiskirstymas. Nors Norvegijos bei Vokietijos rinkoms pasiekiamas atitinkamomis kalbomis lokalizuota platforma, jos sąsaja bei turinys nebuvo lokalizuoti Baltijos šalių rinkai bei nesuteikia galimybių naudotis paslauga lietuvių, latvių ar estų kalbomis.

Nepaisant Netflix įtakos rinkai, visos trys vietinės platformos siūlo unikalias paslaugas, kurių amerikietiškoji platforma negali siūlyti. Tarp šių paslaugų yra linijinės televizijos transliacijos bei neplaninė video turinio nuoma bei pirkimas. Nustatyta, jog nors Netflix lieka reikšminga platforma medijų transformacijos procesams, kitos platformos gali konkuruoti savo vietinėse rinkose ar net išplėsti savo veiklą į kitas teritorijas. Netflix pradėtas medijų transformacijos procesas laikomas tebesitęsiančiu. Analizės metu nustatyta, jog vyksta linijinės televizijos bei srautinio turinio

hibridizacija, kurianti naują medijų vartosenos būdą. Nepanašu, jog Netflix įveiks televiziją – veikiau televizija prisitaiko prie naujojo skaitmeninių pramogų modelio.

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Introduction

In the past two decades, Netflix has undergone a significant transformation, shifting its focus from a US-based DVD rental service to a digital streaming platform with millions of users worldwide. The shift of the service model, the move towards the digital space, and the growing global outreach are all factors that reflect the globalisation waves which were observed in society with the increased access to technologies, particularly the internet, as well as growing international market relations and the rise of social media. While Netflix in and of itself is not a social media platform—although some arguments could be made that it held a social factor at one point, as the users were able to write their own reviews for the content—the films and series streaming worldwide often become trending topics on platforms such as Twitter and Facebook, thus making the red-on-black logo recognisable to an even broader audience.

The massive global expansion which the platform initiated in the mid-2010s has led to a growing recognisability of subscription-video-on-demand (SVOD), also known as over-the-top (OTT), platforms worldwide, particularly in regions where digital streaming was previously not widely used or unavailable altogether. The worldwide impact of Netflix has led to some local broadcast networks developing streaming platforms following a similar model yet offering content that is catered to a more niche target demographic. This generally means that the catalogue includes content which is unavailable on Netflix or provides the option to view films and series created for the target demographic in question or translated and interpreted to the languages spoken in the region.

This recent surge of SVOD platforms garnering popularity across the globe and traditional media platforms expanding into the digital space appears to have triggered a new media transformation – one powered by the internet. While Netflix remains one of the most popular players in the market, its competition has been growing on two fronts. The first concerns platforms spearheaded by large-scale media corporations, often also originating in the US, that hold strict reins over their intellectual property and have barred Netflix from accessing it in recent years. The second, albeit smaller, comes from the local markets creating their own alternatives and integrating television services that the regional audiences are well-familiar with into the digital space. The media transformation that had begun by a single media service shifting its business model has led to an accelerated change in the way people consume media, creating an even more individualistic experience that is influenced by the movements of globalisation.

The following research investigates the role Netflix has played in the growing popularity of SVOD platforms and its state as one of the dominant market names. As an anglophone, American product at its core, the platform can be seen as a typical example of the dominant influence of the Global North on the wider society and capitalist markets. Netflix created a new niche in how people interact with and consume media on a more individual basis, driven primarily by recommendation algorithms. This makes Netflix one of the key examples of algorithmic culture – one where genuine personal interests are translated into a binary code and compartmentalised based on pre-programmed criteria. Although Netflix is also available as an app for tablets and mobile devices, providing a scalable user experience, the focus is maintained on the design of the web platform.

The first part of this work provides an overview of Netflix as both a company and a platform. The history from its origins to the switch of its service model is presented, and the different stages of the global expansion are detailed. While the mass global expansion of 2016 is regarded as the most

influential globalisation move, the early stages, beginning with Canada gaining access to Netflix in 2010, are also covered. Some of the strategies taken during the service's expansion into non-English markets are explored by analysing the presentation and core goals of the now-defunct HERMES project. The first section also touches on the steps that Netflix as a corporation has taken to preserve its role as one of or, in some instances, the dominant platform in several regions by establishing physical offices and working on productions in different regions across the globe.

The next part of the work covers the literature and theory that was used for the analysis and compares it to the moves that Netflix has made as part of its development and global expansion. The research has been structuralised into five categories for ease of access. The first subsection covers the concept of globalisation and uses Appadurai's ideas of homogeneity and heterogeneity to see how Netflix acts as an element of the dominant market and culture that impacts and alters the non-dominant markets that it has entered. The second subsection introduces Escobar's idea of glocality and how it ties to the development of the SVOD market outside of the US, with new platforms that are both inspired by and acting as competition against Netflix. The third subsection delves more into the aspect of inspiration, or push, that Netflix has provided in different regions as its network expanded. The ideas of the network society as established by Castells are used to analyse the accelerating spread of digital streaming platforms and show how the prominence of a global product can influence regional markets. This subsection also investigates how Netflix's global outreach has pushed forward a new media transformation by straying further from traditional, scheduled television programming to a free-to-choose algorithmic model of digital streaming, using McLuhan's thoughts on media. The ideas of algorithmic culture are expanded upon further in the fourth subsection, looking particularly into how Netflix has used its innovative recommendation algorithm to create a unique product which garnered international attention. In the final subsection, the concepts of user interface and user experience are explored. Some ideas of UX psychology are covered, regarding how the visual presentation and accessibility may have led to the platform's success, creating a template that appeared to be followed by other new streaming services. Some of the UX translation strategies are briefly touched upon; however, the linguistic aspects are covered primarily to provide cultural context for the platform and its market competitors. Netflix's user interface is also introduced here, including the strategies taken to improve user engagement.

The aim of the research is to show that the media transformation process which was triggered by Netflix's SVOD services has altered the relationship between linear television and digital streaming, leading to a new type of catered content consumption.

The objectives of the research are the following:

1. Define Netflix's transition from a physical to a digital service as media transformation.
2. Determine Netflix's influence on the growth of SVOD platforms.
3. Analyse which aspects of Netflix's user interface and user experience have been adopted by local competitors.
4. Determine whether Netflix may have had an impact on the content availability of its competitors in the smaller local markets.

To complete the research, a qualitative visual analysis was conducted comparing the Netflix platform to three other SVOD platforms, namely the Norwegian NRK TV, the German RTL+, and Go3 which is available in the Baltic States. The research does not aim to analyse or review the content itself

provided on the platforms, i.e., provide the in-depth plot or subjective opinions. However, the distribution of local vs. global productions is taken into and some specific media examples are expanded upon to explore the global and regional influences. Furthermore, the cultural context of media consumption and distribution in the regions is discussed to provide a background for Netflix's impact not just as a streaming platform but as an American production company.

The discussion of the UI/UX analysis reveals a clear aesthetic influence on the local competitors of Netflix, particularly following the global expansion in 2016. The visual design, the language used to phrase the categories presented by the recommendation algorithms, and the intuitiveness of the controls appear to be directly influenced by the platform with the larger market share, as revealed by some of the statistics. It has been determined that while Netflix has a strong influence on the visual presentation of the user interface, the written aspects and the presentation of individual content preserves local cultural aspects, such as linguistic norms and exclusivity of regional content.

However, it cannot be claimed that the platforms have copied or stolen aspects of the Netflix UI/UX due to legal concerns. Moreover, there is enough content diversity and appeal to the local target demographics that the competitiveness between the platforms can be perceived as a growing niche of glocality in the SVOD sphere. The increased appearance of some of Netflix's biggest global competitors in the local markets may also have a significant impact on the glocalisation processes, particularly as the contracts between the local and global platforms could lead to the former being swallowed up, leading to increased homogeneity of content available in the different regions. In 2022, this stage of media transformation can still be considered relatively new, and its next steps may be difficult to predict due to the dynamic changes in the SVOD market, both in the US and other parts of the world.

1. Establishing SVOD Platforms: Netflix

As a subscription-video-in-demand platform, Netflix can be considered a trailblazer. Prior to its move into the digital space, there were few options to access media content such as films or TV series online. YouTube, the largest video sharing platform in the world, only launched its movie rental service in 2010 (Helft, 2010), when Netflix had already started carving its place in the online market. The following section will cover the history of Netflix and the transformation of its business model between its inception up to recent developments in 2022. As part of the timeline, the process of the global expansion is detailed, alongside the HERMES project and what role its goals play in the globalisation model to this day. Finally, Netflix's business models and strategies to increase its global presence both physically and digitally are presented.

However, before looking at Netflix as a platform in particular, the terms “subscription video on demand” and “over-the-top media service” must first be established. Both terms are used interchangeably to refer to the same digital model of media distribution. Subscription video on demand platforms are digital content streaming services where users can access a specific catalogue for a fixed subscription fee, typically on a monthly or annual basis. The content is available solely online, meaning that it cannot be leased as a DVD. Once the online leasing period ends, the content is removed from the catalogue and can no longer be accessed. Alongside SVOD and OTT, the term TVOD may also be used. TVOD refers to transactional video on demand. This is a digital leasing service where, rather than subscribing to the full catalogue, a user can rent or purchase specific digital content, i.e., a particular film, an episode or a season of a series, for a specific fee (Grece, 2021).

1.1. History of Netflix: An Overview

Today, Netflix is a digital subscription video on demand (SVOD) streaming platform. However, its origins were tied to a different service model. Netflix was established in 1997 in the US by Reed Hastings and Marc Randolph and initially functioned as a private DVDs-by-mail rental service. The company was created as an alternative to Blockbuster, then-popular VHS rental service. Hastings had the idea for this business venture after dealing with late fees that he had to pay Blockbuster for failing to return a tape in time (Dodd, 2012). The business model that Hastings and Randolph decided to develop was inspired by Amazon's online book catalogue (Hastings & Mayer, 2020). At the time, ecommerce was still a relatively new venture, as were DVDs. Based on the price margin, the process of mailing a DVD appeared to be far more cost-efficient than a VHS tape, due to the size and postal expenses. Upon its launch, Netflix offered 925 titles, which, according to Hastings, was nearly the entire catalogue of DVDs available in the late 1990s (ibid). Users could access the catalogue on the Netflix website, choose their preferred titles, and have the DVDs sent to their homes. To return, users would simply mail the DVD back to the designated address.

A decade after its inception, in 2007, Netflix started offering an early iteration of its over the top (OTT) services. This meant that a limited catalogue of for-rent content became available for users to watch online. As with its initial business venture, this digital streaming model was relatively new in the field. At the time, Netflix offered a catalogue of over 70,000 DVDs and the initial streaming selection consisted of 1,000 titles, including both movies and TV series (Helft, 2007). The long-term vision was to make the service available not just as a web browser, but as software available on portable devices. This vision was later realised, as the Netflix app is available on different mobile devices. Hastings was quoted by Helft (ibid.), stating that the streaming services were not yet at their

prime and describing the market as “microscopic” compared to the availability of DVDs. To compete with other services that offered streaming at the time, such as Amazon—which remains one of the company’s largest competitors to this day—Netflix did not charge rent per-stream. Instead, subscribers were able to watch 18 hours of content for free. The pricing aspect was what made Netflix stand out among its competitors at the time – the model was more cost-efficient, and the users were able to simultaneously access the streaming features while maintaining their DVD rental privileges for the same price.

As predicted by Hastings, Netflix started inching towards the golden age of streaming several years after the launch of this service model. In 2010, the number of subscribers that streamed content on the web platform was higher than those who chose the DVD option (Dodd, 2012). A year later, a new payment model was introduced, for the first time separating the membership between those who use the platform for the DVD service and those who stream content. The separation between the two models was the starting point of intensified SVOD service promotion (ibid).

2010 also marked the start of the company’s shift towards global expansion as the service became available in Canada (Vlessing, 2010). Although French is one of the national languages of Canada, it was not offered to users upon launch (Nowak, 2010). In fact, French was not among initial languages to have been used to localise Netflix. In 2012, as the platform became available in the United Kingdom, Ireland, and South America. Spanish and Portuguese were the first foreign languages added on the platform to improve accessibility. This marked the first real venture into the non-anglophone market. By this point, Netflix was already the platform with the highest subscriber count in the US (Dodd, 2012). This first wave of the global Netflix network was followed by the expansion into Scandinavia the same year and a few markets, including Germany and France, in 2014 (Kelion, 2014).

2016 was the year of the biggest Netflix expansion in history. In January, it was announced that the platform would become available in more than 130 territories, making it accessible in nearly every country in the world (Netflix, 2016). This expansion was accompanied by intensified efforts to localise the platform and integrate more languages for dubbing and subtitle options, starting with 20 language options. This number has since grown to 30 languages for the user interface itself and 38 languages for the audio track and subtitles. It is worth mentioning that the latter number includes regional dialects – for example, users can choose between American and British English or South American and European Spanish.

Since the beginning of the expansion process, Netflix has not only added new languages to its interface but also started providing more content from the regions where it is present. Foreign-made content has generally received equal treatment as the anglophone productions, frequently featuring on the home page of the website, drawing accolades, and popularising the platform in the regions where it originated. Alongside the expansion of the platform itself, Netflix has also grown its influence in social media, with official accounts, like @NetflixDE or @NetflixBR on Twitter, helping audiences find the relevant news and updates in their preferred languages, concerning content that is available in their regions. While each local Netflix Twitter account serves the same primary purpose—promoting the new content and ensuring the social interactions with followers in replies lead to increased engagement—it has been noted that there are some cultural differences within the content, focusing more on being informative or humorous depending on the account (Paz Pérez, 2020).

Up until 2022, Netflix saw a steady annual increase of subscribers without any notable dips within the past decade. According to Stoll (2022b), the user base has nearly tripled since Netflix's global expansion in 2016, going from roughly 77 million users in the first quarter of the year to 221 million in the first quarter of 2022. There was a recorded decrease of roughly 200 000 subscribers between the third quarter of 2021 and the first quarter of 2022. This may relate to Netflix leaving the Russian market, as well as some customers expressing dissatisfaction at the announcement that the platform may start implementing advertisements. Nevertheless, Netflix maintains its stronghold as one of the biggest SVOD platforms in the world.

1.2. The HERMES Test Project

The 2016 global expansion was a massive-scale project. On top of preparing the platform's user interface in twenty languages, the localisation teams also must consistently work on making the content available in as many languages as possible to ensure that the target demographics across the globe are not ignored and remain active users of the service. It was noticed even prior to the expansion that non-English content was doing well in terms of viewership, with the bilingual series "Narcos" being one of the most-successful productions prior to the mass expansion (Netflix, 2016). One of the primary goals of entering the new markets, according to Ted Sarandos, was to "bring the world's stories to the world's people" (ibid.) – to allow the digital cultural exchange through the medium of film and television, by enabling people from varying regions to have access to content that they may not be able to view in other circumstances. To help this process of cultural digital access, Netflix kickstarted the HERMES test project.

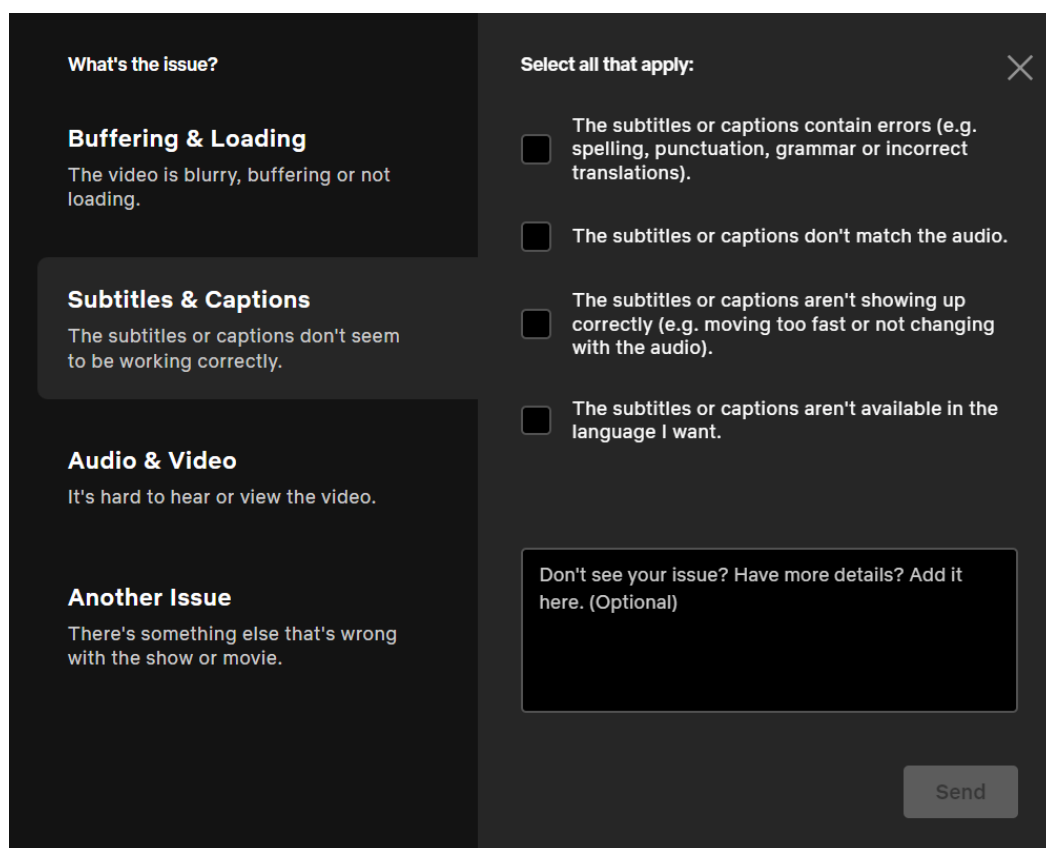
HERMES is a now-defunct localisation and translation project created to improve Netflix's accessibility. It was launched in 2017 by Chris Fetner, then Netflix's Director of Content Localization & Quality Control, and Denny Sheehan, then Netflix's Director of Global Media Engineering and Partnership. The key idea of this project was to attract translators speaking one of the languages that have been newly added to the platform and help improve the quality of content access. According to Fetner and Sheehan (2017), up until that point, nearly all localisation processes were outsourced to third-party vendors. While this provided good quality localisations of individual pages or content items, it was next to impossible to standardise the translation norms regarding Netflix specifically. HERMES, as stated by the authors of the idea, was supposed to help "delight members in "their" language, while staying true to creative intent and mindful of cultural nuances" (ibid).

In this regard, the HERMES project offered a unique outlook towards localisation. As far as the criteria was concerned, the candidates for this program were expected to be fluent in English and at least one other language, preferably their native one. However, it was required to not just have a good understanding of the grammar or syntax, but also to be well-versed idiomatically, understand culture-specific references, and know how to appropriately adapt content for a different culture without sacrificing the creative intent.

The next step of the project was to start developing a recommender algorithm resembling the one Netflix users engage with when they select which content to watch. However, in this case, the localisers would be matched to their preferred genre or content style. These recommendations would be made according to the localiser's prior work done on Netflix projects.

However, there is little information whether this recommendation algorithm for subtitling in particular was implemented by the Netflix team. The HERMES project received a surge of applications from both professional and amateur translators, leading to it shutting down. Allison Smith, Globalisation Innovation Manager at Netflix, was quoted in Nikolic & Bywood (2021), stating that the project acted as a test to determine whether such localisation training strategy would be effective; however, it was determined that employing third party vendors was the more effective solution to the problem.

Despite the program having been shut down, Netflix has not strayed from allowing users to directly partake in the quality assurance of the content localisation, applying both to the user interface as a whole and the specific content. Users can report any issues they may experience with the audio or subtitles (fig. 1).



The image shows a dark-themed user interface for reporting issues. On the left, under the heading "What's the issue?", there are four categories: "Buffering & Loading" (video is blurry, buffering or not loading), "Subtitles & Captions" (subtitles or captions don't seem to be working correctly), "Audio & Video" (it's hard to hear or view the video), and "Another Issue" (something else is wrong with the show or movie). On the right, under "Select all that apply:", there are four checkboxes with corresponding descriptions: "The subtitles or captions contain errors (e.g. spelling, punctuation, grammar or incorrect translations)", "The subtitles or captions don't match the audio.", "The subtitles or captions aren't showing up correctly (e.g. moving too fast or not changing with the audio).", and "The subtitles or captions aren't available in the language I want." Below these is a text input field with the placeholder "Don't see your issue? Have more details? Add it here. (Optional)". At the bottom right is a "Send" button.

Fig. 1. The report submission UI for subtitles and captions.

Since the HERMES project was short-lived, it is difficult to determine how impactful the recommendation-for-subtitling algorithm would have been. The approach appeared to be more culture-based than grammar-based, making a seamless integration into a local market more plausible. However, arguments could be made that some cultures would still be overlooked or ignored during the subtitling process. For example, issues could arise with Spanish translations, given the different dialects spoken in Central and South America compared to Spain, or for content that has to be translated into English, given the variations between British, Australian, and other dialects.

Here, questions of cultural sensitivity and which dialect would be perceived as the preferred one could possibly lead to content being misrepresented or misunderstood. In the case of translation into English, it could be very likely to assume that the primary translation would be made into American

English, given that Netflix is an American product, which would further lead to the American culture dominating over the other cultural spheres. Such discourse of content-specific cultural and linguistic aspects on a global scale may be subject to a different analysis of globalisation and glocality.

1.3. Business Models and Ventures

Throughout more than two decades of its existence, Netflix has shown innovation with its strategies, developing new service models that could attract an ever-increasing subscriber count. The company stayed ahead of the curve and offered customers services and technologies that were yet to be leveraged by its competitors. The core technology that jump-started the creation of Netflix, DVDs, first entered the US market in March 1997 (Klasson, 1998). Netflix, as a company, was established only five months later and launched the DVD rental site in 1998. This allowed the company to play a significant role in the DVD distribution across the US and, eventually, become one of the main brand names associated with rental services. As already established, Netflix was initially launched as a DVD rental service. Subscribers would pay a fixed monthly fee and be eligible to rent any DVDs that were available on the catalogue. At the end of the rental period, they would mail the DVD back to the distributor. This was an efficient way to gain early access to new movie releases without having to wait until they aired on standard or cable television.

Despite the heavy focus on the digital product in the last decade, initially Netflix did not abandon its physical service. However, the services offered by the company on-site have dramatically shifted. The DVD rental option remained an impactful part of Netflix's business strategy, with roughly 3 million users still subscribed to this service in 2019 (Monahan & Griggs, 2019). One of the main reasons cited for choosing the rental service over digital streaming was bandwidth limitations – in order to access the films or series in high quality, Netflix consumes a large amount of bandwidth. According to the 2022 Global Internet Phenomena Report, Netflix was leading by both upstream and downstream traffic share in both the EMEA region and the Americas. This high traffic consumption can cause issues in regions where broadband access is limited – an issue that applies not just to the rural areas in the US but also to other regions without wide network distribution. Thus, the DVD rental service acted as a more accessible solution for those who wanted to access the Netflix catalogue without experiencing buffering issues (Katwala, 2020).

As of 2020, it was still possible to rent physical DVDs following the old business model (Gebel, 2020). At the time of writing, the designated DVD rental website appears to no longer exist. There is little to no information as to when or why the service was withdrawn. However, it is very likely that DVD rentals were called off due to a steady decline in subscribers and increased issues with the postal services during the COVID-19 pandemic (Katwala, 2020). The rental service remained a regionally restricted feature, detached from the expansion of digital streaming. This branching out between the physical and digital service models can in a sense be used as the market for the media transformation which Netflix instilled – the old model that remained in a single market, tied to receiving a physical DVD, greatly limiting the access of the content you can have on hand, versus the new model, accessible from anywhere, with thousands of options that the user can curate based on their interests. Indeed, it was the model shift that made Netflix a recognisable name among wider audiences. While for a long while Netflix was synonymous with red envelopes used to send the DVDs, nowadays, it is far more recognisable for the animation of a red ribbon taking the shape of the letter N, with an

accompanying “ta-dum” sound effect that the users are greeted with when they start watching new content.

As the popularity in Netflix’s streaming service increased in the early 2010s, and with the growth of available foreign markets, Netflix started investing more not just in distributing content of other labels, but in creating a production company of its own. In 2012, the company debuted its first exclusive original content, the Norwegian-American series “Lilyhammer” (Heritage, 2022). In the decade since, Netflix has distributed a wide range of original content, including live-action and animation films, TV series. One of the most significant aspects of this content is the way it is distributed on the platform. Prior to Netflix, digital streaming platforms generally followed the same model as TV channels, particularly regarding serialised content. New episodes were released sequentially, on a predetermined schedule. However, Netflix began a new model of publishing by releasing all episodes of a series on the same day. This was described by Hastings as the beginning of “the binge era” – a media consumption model when the user watches all the available new content at once or in large chunks of at least three episodes at a time (Netflix, 2016).

It is worth noting that throughout its existence Netflix has, for the most part, strayed from the traditional television models. With some exceptional cases of series being updated with new episodes weekly and the general monthly release and removal schedules, the content can be accessed without any further time constraints, according solely to the users’ wants. However, in late 2020, the platform began its first experimental venture into TV-based scheduling on the French platform with the web-based experience “Direct” (Adalian, 2020). This introduced a streaming model that was unique to the platform but well-familiar to traditional television viewers. “Direct” works in a 24-hour grid: the programming is scheduled several days in advance and rotates on a regular basis, according to the content preferences of the French user base. According to the press release which was published during the launch of “Direct”, the French market was chosen for the testing as watching traditional TV has not lost its popularity in France (Grewal, 2020). This contrasts from the US markets, where SVOD platforms have been steadily overtaking as the preferred means of consuming content, while TV viewership has been on a steady decline (Bridge, 2022). As of 2022, access to “Direct” has not been made widely available to users outside France.

The integration of scheduled TV services was also recently covered in the context of Russia. Following the local legislation, as a subscription-based service with over 100 000 subscribers, Netflix was obliged to make roughly 20 Russian TV channels available for live streaming on the platform. This was seen as an unprecedented move, particularly in the early days of Russia’s invasion of Ukraine which started in late February 2022. On February 28th, Netflix officially stated that it had no plans to adhere to the regulations given the circumstances (Flint, 2022). In March, Netflix suspended its services in Russia altogether, once again citing current circumstances (Reuters, 2022).

The jump back into a TV-based streaming model where the content is provided via a schedule can be seen as an overlap amidst the process of media transformation. While Netflix’s initial service acts as an improved substitution to television, particularly the cable television model, the introduction of scheduling in a sense recreates the experience of watching traditional TV. The integration of universally scheduled programming based solely on user preferences and popularity of certain shows through the Netflix user base could lead back to the phenomenon that Castells (2010) referred to as susceptibility to being made homogenous. All the content that is placed on the “Direct” scheduling is

based on viewership. If this were to be universalised, the scheduling preferences could sway strongly to those seen in users from North America and the EMEA region, which make up for more than half of the total Netflix users – over 70 million and over 66 million respectively, compared to Latin America’s 37.5 million and the APAC region’s 25.4 million users, based on the 2020 subscription data (Iqbal, 2022).

In addition to the digital services offered around most of the countries, Netflix has also established physical offices in some of the regions to focus on developing local projects as Netflix Original content. Netflix Originals have become one of the key selling points of the platform. They consist of films and series that cannot be legally accessed on other streaming platforms and are funded by Netflix as a production studio. However, it must be noted that there are some exceptions to the limited accessibility of Netflix Originals. Some films produced by Netflix, such as Martin Scorsese’s 2019 film “The Irishman”, have received limited cinema runs; however, these were typically reserved solely to the US market. Furthermore, in 2022, Netflix transferred the ownership rights over several series, including “Daredevil”, “Jessica Jones”, and “The Defenders” to the streaming platform Disney+ due to the latter’s ownership over Marvel intellectual properties. Netflix also no longer holds the rights to stream content produced and owned by Disney.

As part of the Netflix Originals projects, the company offers the full production of films and series. These projects increasingly include content made outside of the English-speaking world. Content produced in South Korea, Germany, Brazil and other regions has been funded, created, and distributed by Netflix to significant critical acclaim. As part of the production processes, Netflix has been opening more offices, with the most recent plans being to open a new department in Poland as means to expand into Central and Eastern Europe beyond content distribution (Yossman, 2022). To date, the European offices include London, Berlin, Rome, and Paris, among others. In terms of accessibility, the Central and Eastern European region has been somewhat overlooked, with very limited access to languages available. Although Czech, Polish, Croatian, Ukrainian, and Russian are among languages currently accessible on the platform, languages spoken in the Baltic region have been overlooked altogether. The aim of the CEE office expansion is to improve the accessibility and recognisability of the users and content originating in this region. The installation of local cores via regional offices could lead to a certain level of decentralisation within Netflix’s infrastructure. The main core of the company still resides in California, where many of the executive decisions concerning the content distribution and the direction of the platform are taken. However, the regional offices may provide a more level, decentralised playing ground, reducing the influence of the dominant American perspective and allowing for a better integration with the regional expectations and visions.

2. Applying Theory to the Netflix SVOD Model

As a phenomenon of globalisation, Netflix presents a unique case due to its shift from physical to digital service and rapid global expansion. Throughout the 25 years since its launch, Netflix has seen the biggest growth of revenue and user base in the past six years, meaning that the company has been growing significantly influential on a global scale within a quarter of its existence. The strategies of marketing and international expansion used by the company can be viewed not only through an economical but also through a social and cultural lens.

Moreover, the link between the social and economic roles of Netflix becomes even more evident in the context of the world events that transpired and are ongoing from 2020 onwards. The COVID-19 pandemic and, more recently, the invasion of Ukraine, have led to the company having to alter its global strategy from two angles — as a digital streaming platform and as a production company with active projects. Although some of the events are very recent at the time of writing, they can be identified as examples of how the culture and politics of the physical world can impact the relatively borderless digital network of nodes.

The literature used to conduct the analysis of Netflix and its competitors can be generally regarded in two categories – the socio-cultural angle of globalisation theories and the technical angle of algorithmic culture and user interface/user experience. Due to the structure of Netflix as a product and its tendency to trend on social media platforms, the two angles tend to overlap. This can further point toward the significant influence that digital technology has on society, as well as the more theoretical overlap between humanitarian sciences and information technology.

Thus, the literary analysis has been categorised into five subsections. The first section covers the concepts of globalisation, homogeneity, and heterogeneity as established by Appadurai (2005). Here, the theories are applied to establish whether the notable dominance of Netflix in the global landscape of SVOD platforms could lead not just to the same content being available everywhere with little range, but also other platforms solely relying on the UI model presented by Netflix.

The Glocality subsection ties Escobar's (2001) theory that external influence of the dominant American culture that is being spread via Netflix can not only compete but also coexist with media consumption habits and preferences that are prominent in certain regions. It also touches on the tensions that glocality can cause between the processes of localisation and globalisation in the economic and cultural fields, as stated by Chuang and Lee (2015).

The Network Society & Media Transformation section addresses two aspects of Netflix's expansion. The first, based on the work by Castells (2010), analyses how the accelerated growth of the global internet network parallels the rapid expansion of not just Netflix, but also its regional competitors and how their expansion rate was impacted by Netflix's model of success. Furthermore, Netflix's shift from a physical service to a digital one demonstrates a new wave of media transformation. The platforms selected for the glocality analysis are all owned by or related to regional TV channels. Thus, McLuhan's (2003) ideas of media reversals are touched upon to determine whether the adoption of a scheduled model like "Direct" and the blurring lines between digital TV and SVOD streaming could be a shift from television to digital streaming and back to television.

The fourth subsection looks like what role Netflix played in the development of the recommendation algorithms that are now commonly used on platforms that promote media consumption based on

individual preferences like Netflix. Here, particular focus is given to Striphas (2015) and his concept of algorithmic culture, as well as Cheney-Lippold's (2017) ideas of how personal information and interests can be transformed into algorithmic data.

The final subsection delves more into the technical side of user interface and user experience. As Netflix is an audiovisual platform, its visual presentation is key to determining how it adapts to local markets and what strategies it uses to garner and maintain its user base. Here, the ideas of working with the bottlenecks of social influence and why UX psychology is as necessary for a product to be accepted in a new region as its localisation as stated by Evans (2017) are applied to the context of Netflix.

2.1. Globalisation

In the context of corporations such as Netflix, globality and globalisation are multifaceted terms. The meaning that is perhaps the closest to the surface level is that Netflix is a global corporation. As established prior, Netflix provides its service in nearly 200 countries. Furthermore, it reinforces its globalisation by expanding physically and establishing offices that represent certain regions. Regarding the user base, it was reported that between 2019 and 2020, international markets accounted for the lion's share of net subscriber additions. Of more than 36 million new subscribers, more than 80% were from outside North America (Richter, 2021). Thus, from a service standpoint, Netflix can firmly be defined as a global company.

Globalisation processes can cause tension between two cultures – the dominant culture that holds the global powers and the local culture that is being affected by globality (Chuang & Lee, 2015). In many instances, including the case of Netflix expansion, the global culture is represented by the Global North, or the US in particular. As one of the first SVOD platforms to garner a global reach that encompasses nearly all available territories, this puts Netflix, an American platform, at a highly influential position. The US is an economic and political powerhouse, and Netflix's role as an entertainment platform means that customers are exposed to even more American culture and media, while productions portraying other regions may be filtered via Western-centric lens. However, while it may be the simplest option to conflate all globalisation with North American dominance, Appadurai (2005) warns not to equate the term Globalisation to Americanisation, as this subject is far more complex and often affects specific geographies.

The conflict of globalisation is more specifically the conflict of homogeneity and heterogeneity. Cultural heterogenisation refers to cultural diversity and variation. Heterogeneity promotes the importance of maintaining individual cultural aspects within the global landscape, including national and cultural identity, traditions, rituals and others. Homogeneity, on the other hand, is something that is often perceived as a threat – a growing assimilation between different cultures, usually by appearing more and more as the dominant culture (ibid).

The rise of homogeneity is a concern surrounding Netflix's global outreach. Given its market position, Netflix poses a strong possibility of promoting American or anglophone content over foreign content, even if such content is considered native in a particular market. While such concerns are not unfounded given the power that American production companies have through their intellectual properties, Netflix appears to be working on a more heterogenous entertainment model.

The globality of the platform is thus reflected in the content itself – the number of Netflix Originals products in languages other than English and in regions outside of the anglophone sphere has steadily increased in the past few years. In fact, in recent months, non-English content has been dominating Netflix’s watchability statistics. According to the Global Top 10 ratings, in the week between August 30th and September 5th, 2021, the fifth season of the Spanish TV Series “La Casa de Papel” (eng. “The Money Heist”) garnered over 207 million hours of viewership, compared to the most-watched English-language show “Clickbait”, which earned over 76 million hours (Netflix, 2022a, 2022b). This trend experienced a significant spike just three weeks later, when the South Korean series “Squid Game” cumulated 448 million hours of viewership, reaching its peak the following week at over 571 million hours watched on the week between September 27th and October 3rd. “Squid Game” remained in the top position for non-English TV series for nearly two months, until the week of November 15th, when the watchability was overtaken by another South Korean series, “Hellbound”. Throughout the period between September 20th and November 14th, the watchability hours of English-language shows did not exceed 179 million hours, although this particular number, belonging to the series “You” and recorded on the week between October 18th and 24th, managed to briefly overtake the watchability record held by “Squid Game”. Another shift was seen on the week between November 7th and 14th, as the bilingual English-Spanish series “Narcos: Mexico” received 8 million more watched hours (50 million total) than “Squid Game”.

Of course, the watchability trends are strongly affected by the release schedule – a new season of a recurring TV series tends to sway the pendulum one way or the other, regardless of the release language. However, the statistics of the weeks following a big release led to the viewership statistics between English and non-English content to even out, the disparity recorded at up to 10 million hours. The trend that has been set is apparent – non-English content has become more accessible as Netflix became available in more markets. Furthermore, such content also receives significant promotions, leading to the new releases receiving as much popularity or even exceeding that of English-language content. This has been particularly notable with Asian content. According to research conducted by Media Partners Asia, Netflix saw subscriptions in the APAC region rise by 20% in 2021 (Frater, 2022). It is expected that India may see the biggest subscriber growth in the region in 2022 (ibid).

The watchability records, regional growth outside of the US, and the expansion of Netflix’s offices all point towards a single conclusion – Netflix is no longer a service that caters to a single target audience. It is a global product created for a global audience, and the country of origin or the primary language may not negatively impact the watchability or scare off some audiences. The amalgamation of such features defines the image of Netflix as a by-product of globalisation.

However, despite the diversity of content and the global network of users, Netflix is, first and foremost, a US-based product that was initially created for the North American market. Most users that open the website or the app for the first time are greeted in English – the first language used on the platform. Netflix is a service that originated in a country with the world’s leading economy, thus acting as a product of the Global North.

This trend has continued with some of Netflix’s biggest competitors. Three of the platforms that have been, in a sense, following Netflix’s model and growing their global outreach – Disney+, Amazon Prime, and HBO Max – are all US-based, English-language platforms. Much like Netflix, the three platforms are working on establishing their place in foreign markets. Interestingly, the process of

globalisation appears to be accelerating. Amazon Prime became available in 200 territories in 2016, the same year as Netflix's biggest global expansion wave (Barraclough, 2016). Prime's initial streaming service began in 2006, months before Netflix introduced its own SVOD model. HBO Max is the digital streaming platform owned by Warner Brothers and is named after the cable channel HBO. The platform launched in 2020 and started expanding into the foreign markets by 2021 (Willard & Harvey, 2022). Disney+ has been using a global expansion strategy from its inception – the platform launched in 2019 not just in the US, but also Canada and the Netherlands (Holland & Etaghene, 2022). It has entered a few other markets since and is preparing for an expansion into 50 countries in the summer of 2022. This shows that the pace of global SVOD platforms becoming increasingly faster. The rising saturation of US-based companies available in foreign markets can lead to the influence of American media rising and the Western-centric perception overshadowing regional customs and cultures. While the content available on the different platforms may differ, the strong American business influence and centralisation of control could lead to rising homogeneity in both the web design of smaller streaming platforms and the content itself.

2.2. Glocality

Globalisation can create a tense relationship between two cultures – the global, intruding, dominant one and the local culture which is non-dominant on the grander scale. As stated by Quesenbery & Szuc (2011), the processes of globalisation may be easier if everything were the same everywhere, creating complete homogeneity. However, this is not the desired outcome for brands that wish to expand their scope, such as Netflix. It is crucial to adapt local variations. The goal of global companies should be not to suffocate the local market with Western-centric ideals, but to adapt to the culture and values of the local market it is traversing.

The potential threat imposed by Netflix as a platform with then-predominantly American content did not go unnoticed during the global expansion. In fact, the decision to enter such a wide range of diverse markets caused tensions in some of the regions. The European Parliament responded by voting on a legislation that set a content quota (Gusa, 2018). Based on this regulation, at least 30% of the content available on VOD platforms such as Netflix should be European. This was done to ensure the cultural diversity and audiovisual accessibility of media in the European Union.

This intercultural tension may have played a role in Netflix choosing a more heterogeneous path during its extension. Rather than the American culture clashing with the rest of the world, all representations are equally accessible for all users on Netflix, regardless of their production location or language. This synergy and coexistence between the dominant and the non-dominant culture is more reminiscent of glocality (Escobar, 2001). Citing Dirlik, Escobar defines glocality as a phenomenon where all things can be perceived as global and local at once, albeit not to the same degree. Rather than continuously building the tension between homogeneity and heterogeneity, glocality is more democratic, aiming for the aspects of both to be preserved within different cultural spaces.

Netflix itself acknowledges the need to represent the local markets on the platform. Lina Brouneous, Netflix's Director of Film Acquisitions for the EMEA region, stated that the platform plants to continue producing American content. But while English is one of the most widely used languages online, the actual percentage of native English speakers around the world accounts for about 5%,

meaning that the discrepancy between anglophone and foreign content should be leveraged to promote more diverse production at Netflix (Bland, 2021).

Netflix has developed clear strategies for diversifying the content catalogue and highlighting the content developed in the locales where the platform is available (McKay, 2021). As a production company, Netflix can provide financing required to lift off new projects. The platform can then release the content as part of its Originals program, ensuring a larger outreach than the local market would have provided. In some cases, the Netflix Originals content was not conceived with the intent to only stream it on the platform. However, with Netflix as a booster, creators can share their vision which may have been initially intended for their regional viewership. Furthermore, creators are not required to produce the content in English. The Spanish series “The Money Heist” was initially developed for the Spanish market only. After Netflix acquired the distribution rights, the series was able to continue and became a global success (Jones, 2020). The model of content funding and distribution that Netflix engages in may be considered to be the glocalisation of media. Although it appears that Netflix has found an outreach to every possible market, it can expand its services further by establishing more local production departments, such as the aforementioned Warsaw office for the Central and Eastern Europe region (Yossman, 2022).

Nevertheless, glocality can be a tough balancing act. While Netflix does not hold the entire monopoly of the SVOD platforms and while it provides opportunities for foreign productions, it shares the top positions by popularity with other US-based streaming platforms that are available in several regions, such as Disney+ and Amazon Prime. Therefore, the concern remains that the disparity between American and non-American content may grow in the future, leading to media or platform imperialism with the dominant perspective being that of the US (Cunningham & Craig, 2016).

2.3. Network Society & Media Transformation

The introduction of digital, easily accessible content was a likely development given the technological advancements of the past several decades. Indeed, the way SVOD platforms have been developed and distributed across the globe at an ever-accelerating pace is reflective of how the technology they are supported by – the network nodes of the internet – grew from a private, militarised technology to a widely distributed necessity.

Historically, television started off with a relatively limited access. This was firstly due to technological and financial restrictions. TVs were expensive and hard to acquire. Furthermore, television was not equally available everywhere around the world, which made the distribution of the TV network slower. Castells (2010) states that with the emergence of television, the media system was restructured. Older forms of media, such as the radio, did not disappear – this applies to the media landscape of today as well. Instead, the TV medium became the new dominant force. Films became more accessible to TV audiences; serialised content arose as a new format catered specifically to the smaller screens. Television acted not just as a source of entertainment, but also as a communication mode (ibid). Through its functioning, TV promoted homogeneity – each viewer only had access to the same set of channels which aired the same content as established in the linear programming. The viewers were completely dependent on the decisions made by the broadcasting networks. By the 1980s, the homogeneity was slightly reduced with the introduction of multi-channel television services. Broadcast networks introduced new channels, allowing for more choice and variety among the viewers (Lotz, 2014). Furthermore, this is when the first paid cable channels started to emerge.

Consequentially, the dissatisfaction with cable prices was one of the main reasons as to why the SVOD media transformation had such success in the local North American market (Lotz, 2018).

A significant shift to the dominance of television as a media mode occurred in the 1990s, when the internet became available to the public. By 1999, the internet was accessible in every region of the world, although the distribution was not even (ibid). The network has been growing at an accelerating pace since its public launch. It is hard to say if anyone could have predicted what impact the internet would have on the development on new forms of television and media consumption. The technological advancements have always faster in the Global North, particularly North America and Europe (Straubhaar, 2008). So, while the type of media transformation that occurred with the launch of the Netflix SVOD platform may have been more difficult to predict, there is little surprise that such development took pace in the US.

These transitions from radio to traditional television and then from television to digital streaming platforms can be defined as a media transformations. McLuhan (2003) argues that each type of media, after getting to a certain point, reaches its limit and has no choice but to evolve into a different type of media. In the instance of Netflix, traditional television reached a certain point where it could not help but merge with digital technologies, forming the first model of digital streaming. This wave of media transformation, which is arguably ongoing, has taken steps back from traditional, analogue, linear television, and into the blurred space and time of streaming – a personalised media experience, where each viewer can determine what they want to watch, when, where, and for how long. Netflix was initially perceived as the answer to the monotony of cable television. Nowadays, however, a bounce back into some aspects of television can be observed, while the flow of individuality carries on. There have been talks that the platform might make it more difficult for users to share accounts (Thomas & Sherman, 2022), which could lead to users that currently share accounts with others to subscribe individually, further moving towards a completely individualistic media consumption experience. There have also been some reports that the platform may start playing ads even for paying customers. Among the outrage on social media toward this news, some commentators stated that the lack of advertisements was Netflix's selling point against traditional television. Thus, it is likely that the world is now observing the next stage of the SVOD media transformation – one that is headed towards a hybridised model of television and digital streaming that may not exist today.

As stated by Lobato (2019), the emergence of SVOD platforms such as Netflix, as well as the concept of internet-distributed television as a whole, can alter the way we perceive technology and space. Digital distribution has changed the way media is consumed. Content is no longer distributed via the traditional means, such as satellite or cable. Instead, the traffic travels completely digitally, and is located in servers around the globe. The boundaries of geographical borders are blurred – even if certain media is not available in one region, there are means to access it, albeit they may not be legal or straightforward, such as virtual private networks (VPNs) or torrenting. The sense of homogeneity has also been somewhat subdued, albeit not completely eliminated. Users can create their own curated viewing experiences; however, while the catalogue may offer thousands of options and rotates regularly, it is still not infinite. Additionally, the most popular productions are strongly advertised to viewers, creating a more detached homogeneity, where each person can view the same content in different locations across the world, when it is convenient to them.

Discussing the innovation of Netflix compared to the traditional television model during the CES 2016 Keynote, Ted Sarandos mentioned how Netflix has changed the world of media consumption, by listing the restraints of what he described as linear television. Things like pilot episodes and Nielsen ratings have been turning increasingly redundant with the rise of digital streaming (Netflix, 2016). Such success was perhaps unexpected at first. According to Jenner (2018), Netflix's success with its original content was particularly unpredictable.

There have been debates whether Netflix itself should be considered a television, since the content provided can be—and, in some countries, has been—streamed on traditional linear television. It is argued here that Netflix cannot be completely equated to digital television, particularly compared to SVOD platforms that provide additional TV streaming services. Zündel (2019) describes this as TV IV – the next stage of television's evolution which is characterised by strong individualisation and digital access to content. According to Zündel, this shift in television can be defined not just by the transition from linear television to the digital space, but also by the rise of bingeable, direct-to-web series and films.

Although Netflix itself does not fall into the pure digital TV model, given its lack of linear television presence outside of the internet, the ongoing process of media transformation seems to have led to a new type of streaming platform – a TV-SVOD hybrid. These are streaming platforms owned by broadcasting networks that provide a dual streaming service. Part of the content follows the Netflix model and consists of various intellectual property, such as films, series, documentaries and others, that the user can access based on their own time schedule. The other part of the content is the digital television. Here, users are given a choice. They can livestream the content and follow the linear television stream regardless of their location, or they can access the reruns and watch the VOD of the live broadcast at a later time. The subject of hybrid streaming platforms plays an important role in the research section of this project, as the selective competitive platforms provide services adjacent to the digital linear television.

2.4. Algorithmic Culture

Prior to the emergence of digital streaming services, media consumption and access to content was more centralised, offering fewer choices for personalisation. The most reliable means of watching media was following the weekly TV scheduling. There were some features of personal choice, such as the ability to rewind, watching new releases at the cinema, or opting for DVD rental services such as the old Netflix model. However, such opportunities were not widely available – cinemas would only run some movies for a few weeks at a time, and while DVD rentals offered a broader abundance of choice than the TV programming, the quantities of physical discs available were limited.

Furthermore, it was harder to find recommendations based on personal preferences. In 2000, Netflix introduced the earliest version of its recommendation system on the website to help people determine which films they might like based on what they enjoyed in the past. However, this recommendation algorithm, known as Cinematch, was highly flawed, and the suggestions were frequently hit-or-miss (Thompson, 2008). As rudimentary as it was, Cinematch was one of the earliest algorithms that was built to learn from people's personal inputs and interests to refine search results and provide individualised recommendations. At the time, algorithms often still encountered issues with the quality of results. As Netflix's recommendation algorithm was being refined, the primary data for its improvements was extracted from the user feedback. Subscribers were able to rate the DVDs they

rented on the platform and, based on their interests, would be recommended other movies that they may be interested in (Dodd, 2012).

By 2007, when Netflix's digital streaming service launched, Google had only been around for four years, although it had already become one of the most popular search engines online. The search algorithm was still being refined to figure out the preferences of its users and accurately filter queries (Hansell, 2007). It would be several more years before the release of the Google Panda update which aimed to improve the quality of search results and the recognition of spam websites (Levy, 2011). The process of finding content recommendations that would cater to individual preferences was complicated.

Nevertheless, the development and progress made by tech industry giants such as Google and, to a big extent, Netflix, have led to the creation of a new type of culture, extracted from lived experiences and translated into a binary code – the algorithmic culture. Striphas (2015) defines algorithmic culture as taking aspects of society, such as values, artifacts, traditions, and practices, and turning them into units of data. While normally the aspects of culture are sorted and determined by humans, here, algorithms take over this role, automatising the process and basing it on specific pre-determined criteria (Striphas, 2011). Each aspect of society or personality is, in a sense, placed into a labelled box in an attempt to systematise them. This is, essentially, what the Netflix recommendation algorithm does to people's content preferences – interests in certain subjects, genres, and cultures are labelled as one of the many categories and placed in a row alongside other content that has been determined to meet the same criteria. Algorithms are mathematical computations. So, a recommendation algorithm takes the abstract concepts of art, taste, and interest, and processes them as a binary code, looking for a matching label.

This system is, naturally, imperfect. In between 2006 and 2009, Netflix ran a contest known as the Netflix Prize. Its goal was to develop strategies that would help refine the recommendation algorithm and improve its accuracy (Hallinan & Striphas, 2014). In 2007, computer scientist Len Bertoni participated in the contest and encountered an issue with one particular film. It was discovered that attempts to find an accurate recommendation match for the indie film "Napoleon Dynamite" led to a high error rate (Thompson, 2008). This highlights the complexities of dataifying culture – personal bias cannot always be accurately interpreted into code, and some content can be too niche to find a perfect match for. The criteria that each person uses to rate the content they consumed may lead to the same score for very different reasons, applying personal criteria which can be more in-depth or shallow. Regardless, the algorithm reads it as the same outcome, without the nuance of cultural human experience (Finn, 2017).

Although Netflix does not gather as much personal data about the users as social media platforms, it can detect a significant amount of information based solely on the individual's watch history. This information can help determine the person's age group, preferred genres, and even connect the location to the viewing preferences – does the user engage with content that is closer to their geographic location or is more likely to explore the foreign productions? This data is invaluable, as Netflix's recommendation algorithm can be seen as its covert product. As stated by Cheney-Lippold (2017), such data is what keeps multibillion-dollar corporations running, as part of global internet surveillance that the users consent to. Netflix can maintain the user activity for eleven months after account deactivation. The information that Netflix—or any other digital platform—processes about

the user is interpreted by the system as “the sum of who you are” (ibid.), turning genuine interest as much as a misclick on the wrong thumbnail into information that is grouped based on datafied factors. According to the platform’s help centre, the key criteria for personal recommendations are the interactions with the service, the average time spent watching content on the platform, and even the preferred time of day for using the service. In addition to this, recommendations are also impacted by other users, as some content may be recommended because members with a similar viewing history also watched it (Netflix Help Center, n.d.).

On Netflix, users begin curating their content as soon as they create a new account. They are provided with a selection of film and show titles and pick their preferred content. The algorithm then determines which content to recommend. As the user engages with more content, upvotes or downvotes it, the algorithm becomes more sophisticated and can match the recommendations with a higher accuracy. This method of content selection based on personal preferences is part of the curatorial culture. Curationism in media is the process of customising one’s preferences and choosing which content the user wishes to engage with and when (Robinson, 2017). Platforms like Netflix promote curatorial culture, particularly via the use of recommendation algorithms. The more platforms a person uses, the more complex their curatorial process is. Netflix’s search function can recognise certain titles although they are not available in the catalogue. In some instances, the platform may send a notification informing the user that a title they were searching for has been added to the platform. Such function allows users to curate their viewing experience in advance, sometimes unknowingly. This feature contrasts the linear television model. Here, the only possible curation that a user has control over is time – they may determine which channel to watch at a certain time to see their preferred content, or, when possible, rewind to watch it outside of the linear scheduling. Algorithmically reinforced curatorial culture can therefore amplify individuality of the user, making television as a service appear less appealing.

In essence, the use of algorithms to curate the personal viewing experience on one’s own time is one of the key differences between the linear television and digital streaming. This difference can even be applied to linear analogue and linear digital television – the platforms for the latter typically allow easier access to reruns and reduce the time or space restrictions that exist with the requirement of a TV device. Instead, digital television viewers can use a laptop or a mobile device to follow the linear programming. Furthermore, platforms that provide a hybrid service of both SVOD and digital television can be used to analyse the difference between how humans interact with linear streaming and how they navigate algorithm-based content curation according to their personal wants.

2.5. User Interface and User Experience

User experience, as defined by Norman and Nielsen (n.d.), refers to every aspect of a service or a product that the user interacts with. In the case of Netflix, this essentially means how the user feels while browsing the catalogue, navigating the menus, or watching the content. The term UX typically goes hand in hand with UI, or user interface, which is the digital visualisation, i.e., the website, product, or service itself. How easy or difficult a user finds the UI to navigate determines their UX.

Good user experience is typically associated with ease of access and allows the end-product to be utilised efficiently. The strategies and development processes are tied to the psychology and sociology of the consumers, as well as common marketing techniques. For the product to stand out in a competitive market, it must provide a user experience that is both optimised, i.e., easy to navigate,

intuitive, and efficient, and provides unique functionality. The challenges of UX optimization increase as the product becomes available in a wider range of markets, where the consumer psychology may differ due to societal norms.

Evans (2017) emphasises the importance of social interaction in the growth of digital products. UX designers rely heavily on feedback for quality control and development tweaks. Some of the primary tools for receiving user feedback are surveys. They allow users to openly share their opinions on the quality and usability of the product. However, as stated by Reichheld (2011), the key questions are not related to the loyalty of the customers but rather to their willingness to recommend the product, thus further increasing its user base and promoting growth.

The UX strategy employed by the developers of Netflix has played a substantial role in the growing global success of the platform. The development decisions and updates made to the platform to improve its accessibility and utility have been recognised by globally renowned UX designers and leading industry names. Schneider (2021) described the Netflix user experience as “exceptional” and offering a standout “wow” factor through its simplicity.

According to Schneider, one of the main selling features of the Netflix interface is the minimalist design. The platform is recognisable for its limited colour palette, using just three colours that are repeated throughout the design — black, red, and white. The choice of the palette was likely not accidental. Cinemas often use red chairs and curtains. Therefore, by making red one of the most prominent colours of its user interface, Netflix both simulates the experience of being at a movie theatre and ensures visual concentration on the content itself. The white font colour of text brings the relevant information – what the content itself is – to the forefront and fades out from the screen once the content is being watched. Based on the colour theory, red triggers alertness and tends to attract the user’s attention faster (Swasty & Adriyanto, 2017).

Netflix’s user interface is notably dynamic and has undergone several iterations, varying from small visual changes to complete UI upgrades. Over the course of the research, the main page of Netflix underwent some alterations. These changes have affected the highlight previews (fig. 2-4). However, two main calls to action remain consistent – “Play” and “More Info”. It allows the users to engage in the main mechanic of Netflix with ease or read more about the content to see if it matches their personal interests.

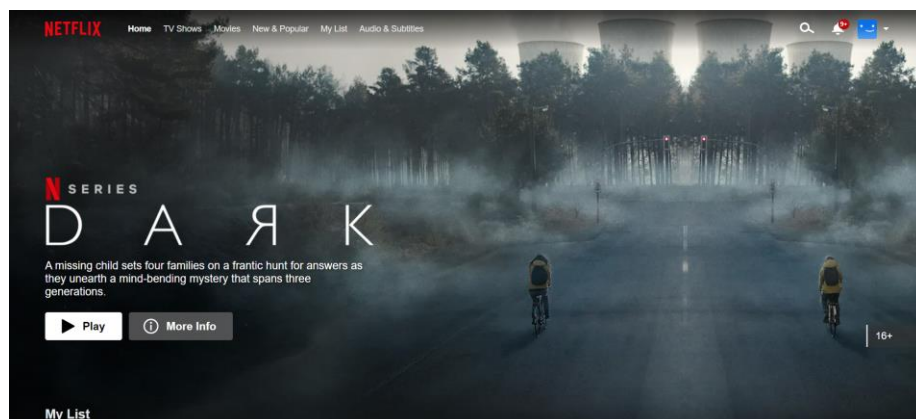


Fig. 2. Netflix UI: highlight feature with the standard preview.

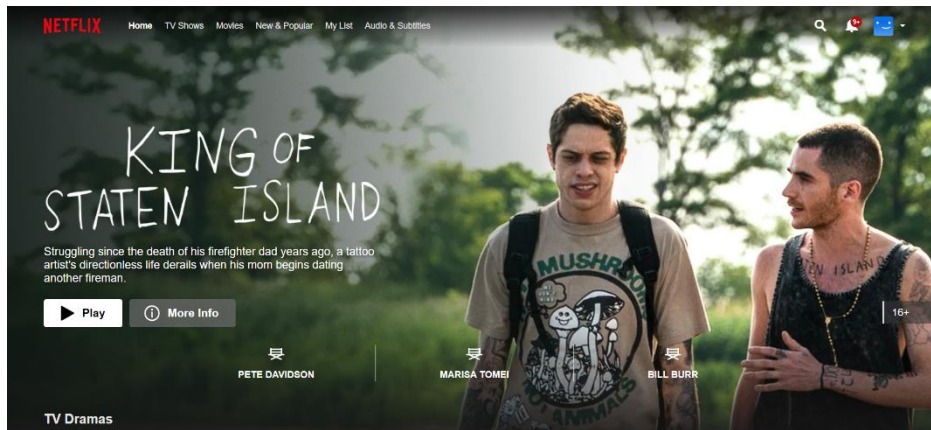


Fig. 3. Netflix UI: highlight feature with casting details.

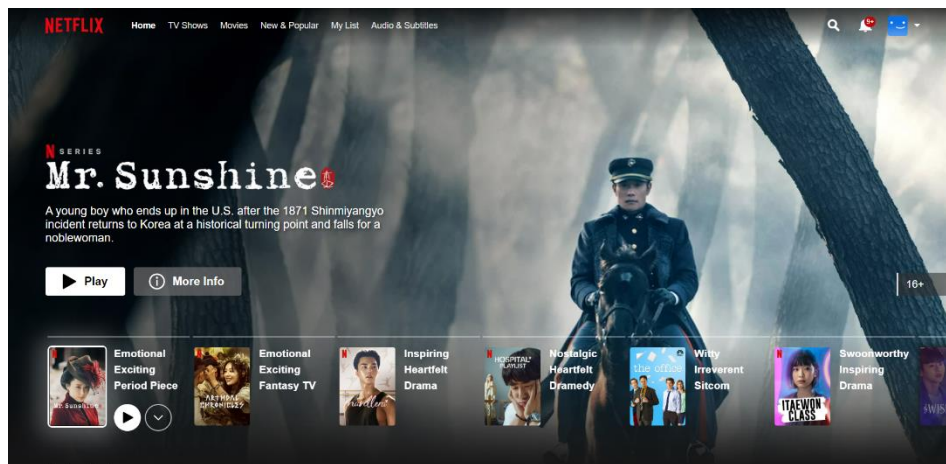


Fig. 4. Netflix UI: highlight feature with recommendations to similar content.

These recent changes demonstrate the increased sophistication of the Netflix recommendation algorithm. The most typical spotlight presentation provides a short description and calls to action to either watch or learn more about the content. However, lately, some series or films featured in the spotlight also provide information on similar content that the user may find interesting or enjoyable, as well as information on the cast involved in the project, which may be relevant to users who search for content based on the actors or directors rather than genre or trending.

The preview format has become prominent on other video-based platforms. Google-owned online video sharing platform YouTube has implemented a similar user interface mechanic on its home page. When a user hovers over a video, the thumbnail expands and offers a selection of actions (fig. 5), while the video starts playing automatically with the sound off. Similarly, a selected thumbnail of a show or movie on Netflix expands upon hovering on it. However, while this used to be the case with certain shows, Netflix no longer automatically plays a brief preview of the content. YouTube has further implemented the autoplay feature on user profiles. Here, the image no longer visually expands and instead several seconds of random preview snapshots are played.

Although YouTube's primary service differs from Netflix's, the two platforms still share some market competition. YouTube offers TVOD services that allow users to rent or purchase movies, as well as SVOD services for exclusive content provided by the creators in the platform (Budzinski, Gaenssle & Lindstädt-Dreusicke, 2021). At the same time Netflix users YouTube's services to promote its

content for different locales. Therefore, it is not surprising that YouTube has chosen to adapt some of the similar user interface strategies to attract and maintain users. In the time since YouTube and Netflix launched in 2005 and 2007 respectively, they have both developed a standard for video catalogue presentation, using a horizontal carousel model as the optimal layout for their content libraries.

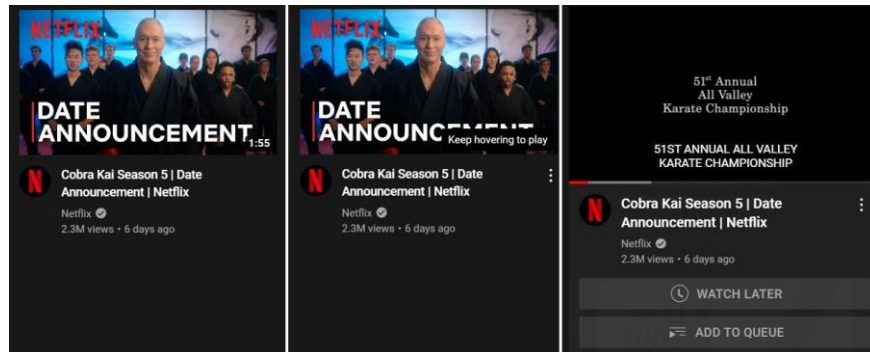


Fig. 5. The hover-to-play functionality on YouTube.

There are several aspects that the survivability of a novel product relies on, such as brand recognition, utility, and convenience for the user. Given that Netflix was one of the first major SVOD platforms, it had the advantage of setting the red carpet for its own recognition. As already discussed, red is the most prominent colour in the Netflix interface. While it differs significantly from the earliest version of the logo – a purple film reel splitting the name in half as the portmanteau of “internet” and “flicks” – the red has been prominently featured in the brand’s marketing since 2000 (fig. 6).

In 2016, soon after the global expansion, the company changed its logo from the full name to just the letter N. This was a strategic move – with the sudden increase of memberships and more mobile users, the minimalist, single-letter design was more convenient to serve as the app icon on a smaller screen (Wilson, 2016). The brand still maintains a bigger logo with the full name that can be seen in the top left corner of the interface. Rather than being evenly aligned, the text is slightly arched to appear as if projected on a screen. This, along with the aforementioned choice of the colour red, elicits the aesthetic of early cinema, thus binding the history of the film industry to its current form – movies that can be viewed not just on the big screens, but on smaller digital devices, too.

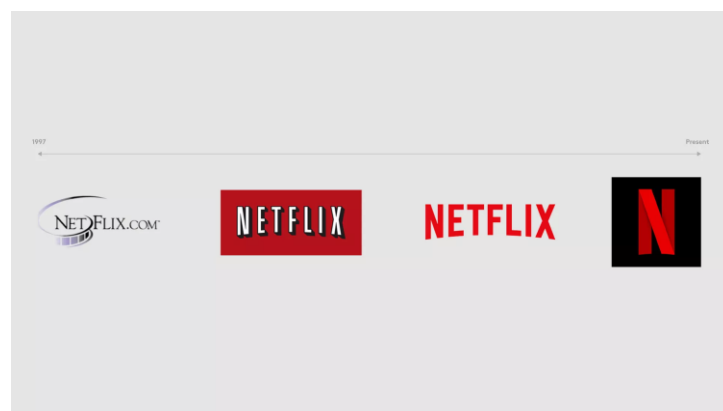


Fig. 6. The evolution of the Netflix brand logo (Rose-Bristow, 2020)

The general philosophy of Netflix’s design appears to be “less is more”. Upon opening the home page, a prospective user is prompted to enter their email address and sign up for the service. This

immediate call-to-action can be effective even on users that do not speak English. Additional information is provided below; however, it does not interfere with the primary prompt – “Subscribe to the service”. The accessibility and ease of use, the visually uncluttered catalogue layer, and minimalistic colour palette have not only helped Netflix become the most popular streaming platform in the world, but also become the benchmark of visual design that has been adopted by other SVOD services, both in the North American market and in other territories where the service is available.

3. Global Market and Development of Glocality: Comparative Analysis

It has already been established that Netflix played a massive role in the rise and development of SVOD platforms as a whole. However, the question remains how influential exactly Netflix has been on the development of such service models in smaller markets, and how it led to a new kind of television-streaming hybridisation. Furthermore, given the status and influence of Netflix as a North American platform, some concerns have been drawn that it may affect the local cultural identity. Thus, it is important to determine whether Netflix had a wider influence on how content is presented on local markets for their respective audiences.

The core element of this research project is the qualitative comparative analysis of Netflix and three digital streaming platforms originating in countries where Netflix is available. The three local platforms that have been chosen for this research are NRK (Norway), RTL+ (Germany), and Go3 (the Baltic states).

It is important to note that each of the platforms discussed in the analysis is owned by a company that also provides TV broadcasting services. Go3 and RTL+ are both privately owned by the TV3 Group and the RTL Group respectively, while NRK is owned by the Norwegian government. Nevertheless, the broadcasting aspect plays an important role in the platforms' competitiveness against Netflix. The local digital platforms have recognisable brand names as they are readily available on traditional television and the streaming websites act as an extension of their services. Netflix does not have a TV channel and exists solely as an OTT service. Thus, the company must use other methods to grow its recognisability in the new international markets.

3.1. Methodology

To conduct this research, the three markets were chosen from three waves of Netflix expansion – Norway as part of the Scandinavian expansion in 2012, Germany for the Central Europe expansion in 2014, and the Baltic States, with particular focus on Lithuania, for the main global wave in 2016. NRK, RTL+, and Go3 were chosen based on their popularity in their respective markets and brand recognisability as region-locked services. The decision to aim for Norwegian, German, and Baltic (Lithuanian) locales was strongly influenced by the researcher's linguistic abilities and cultural awareness. It is important to emphasise that the research is focused on European markets. As noted in section 2.1 Globalisation, there has been a significant growth in subscribers in the APAC region. Thus, it would be advisable to conduct further research into similar SVOD platforms in markets outside of Europe.

For the analysis, first, the overview of the digital streaming platform and its history is provided. Aspects like regional accessibility, language options, and content types are considered. Then, visual examples are provided of the platform in question. When possible, examples of Netflix in the target language are also provided to allow for a cultural analysis in the use of language and attempts to meet the expectations of the local market.

The primary analysis is conducted by comparing the user interface of the four platforms in question. Screenshots of the UI are provided throughout the analysis to serve as visual examples of how Netflix was used to establish a standard of streaming platforms (Appendix 1-4). Where necessary, translations are provided for clarity. Although it is not possible to access the actual recommendation algorithms of each platform, the general categories are compared for cultural-linguistic similarities and the

influence of anglophone phrases. The dubbing and subtitling specificities are not taken into account, but the language availability is noted when discussing the accessibility of platforms. Some comments are made regarding the original content by providing specific examples to further analyse the social and cultural context of the competitive markets and the production tendencies.

Some attention is given to the social engagement of the platforms, particularly interactions on Twitter. The analysis investigates which Netflix locales are represented on social media, whether the regional streaming networks also employ Twitter for promotions and, if so, what cultural strategies they use for engagement. Finally, where applicable, a link with a competitive global streaming platform, i.e., Amazon Prime, HBO Max, or Disney+, is established. This is done to evaluate whether the platform can withstand Netflix's juggernaut competition on its own or whether it must accept the support of another large-scale American company to survive.

3.2. Global Competition: Norway

Of the three regions used in the local market comparison, Norway was one of the earliest countries to be integrated in the Netflix network. The platform became available in the Scandinavian region in October 2012. Netflix has been fully localised in this market, with the user interface, subtitles, and dubbing all available in the Norwegian Bokmål standard.

Content-wise, Netflix has been investing in some Scandinavian productions, including films and series filmed in Norway. The vast majority of this catalogue consists of *Nordic Noir* – thrillers and crime media set in Scandinavia, often based on Scandinavian crime literature (Hill & Turnbull, 2017). However, there has been an increase in diversity of genres available on Netflix's Scandinavian catalogue. In recent years, productions like the Icelandic sci-fi series "Katla", Swedish young adult series "Young Royals", and Norway's productions which include the fantasy show "Ragnarok" and the romantic comedy "Home for Christmas" showcased the diversity of Scandinavian media beyond the crime genre (O'Brien, 2021).

Netflix's investment into the Nordic region has helped broaden the horizons of local creators. The corporation is able to provide financing for more experimental or out-of-the-box projects in genres that are less prominent in the region. According to Tim King, the head of film and TV production at SF Studios in Sweden, Netflix's expansion in the region provided an outlet for creators that were interested in horror and sci-fi in particular (Bland, 2021). Interestingly, the Nordic content is not as appealing to the local market. However, it acts well as an export into foreign markets – a venture that Netflix simplifies by distributing content as Original productions in all available regions (ibid). This brings an interesting perspective on the glocality of content – while most Nordic Noir was initially produced for the local markets, it is likely that the oversaturation of the crime genre and the lack of productions in other genres have led to the interest in the region fading. However, abroad, Nordic Noir has become synonymous with the Scandinavian cultural identity. As Netflix has provided Scandinavian creators with opportunities to create new content in unexplored directions, the combination of the genres has led to a certain split – the product that has been synonymous with the Nordic region for longer was still targeted at the local market yet grew more popular with the global audiences, while the new content which now may have had international viewership in mind as well reaped success both locally and globally. This may be reflective of the way the global business boosts the regional ventures, as mentioned by Castells (2010) – the investment provided by Netflix entering the market and growing its own catalogue has also had a positive effect on the growth of Scandinavian

cinema and TV. However, as will be seen with the case of NRK, there is also a growing tendency among the Norwegian broadcasters to maintain the locally produced media on the home platforms, while leaving the international content more accessible on the imported SVOD platforms.

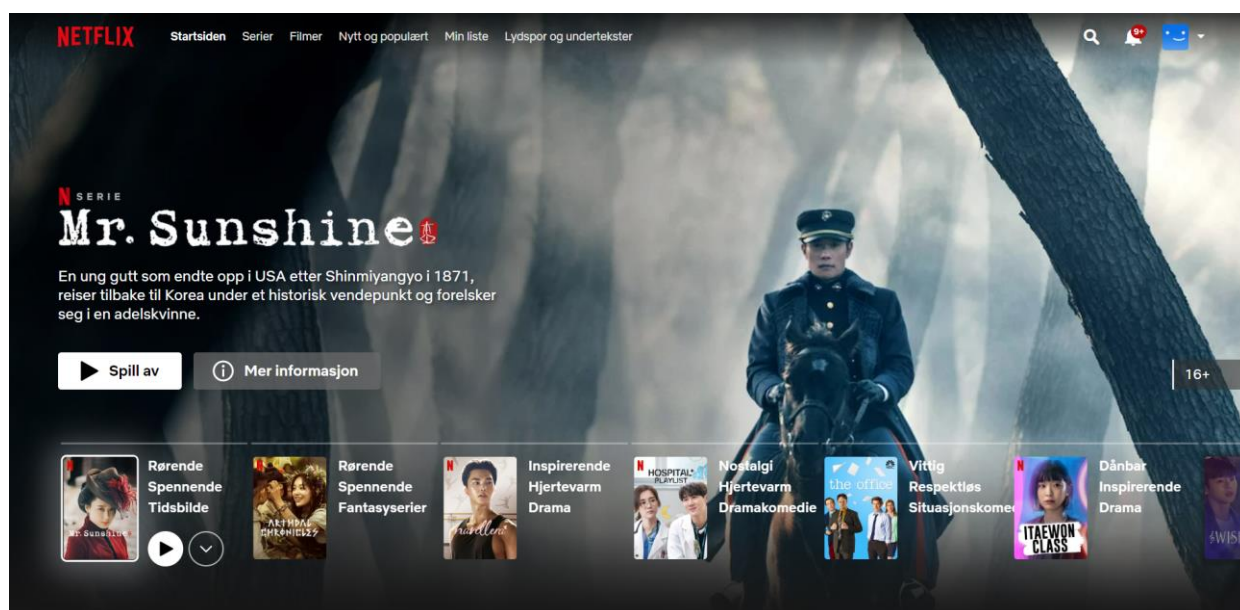


Fig. 7. The user interface of Netflix in Norwegian.

Netflix has been rated as one of the most popular SVOD platforms in Norway. According to a survey conducted in 2021, out of 7000 respondents, roughly 76% were Netflix users (Stoll, 2022a). The platform has also seen success in terms of locally produced content. As mentioned in the section 1.3 Business Models and Ventures, the first Netflix Original that was produced and published on the Platform was the Norwegian-American series “Lilyhammer”. However, while it holds the title of a Netflix Original, the show was co-produced with Norway’s national broadcaster NRK1, one of the channels under the NRK broadcasting umbrella (Heritage, 2022).

NRK is the government owned broadcaster in Norway. According to Stoll (2021), NRK1 and NRK2, both channels under the same broadcasting network, are the first and third most-viewed TV channels in Norway respectively. NRK offers a range of broadcasting services, being the largest mediahouse in the country and follows a decentralised model of management to promote cultural diversity and demographic inclusivity in the country (NRK, 2022a). Among its services are three television channels and 14 radio channels. According to the company’s communication department (ibid), Norway was the first country in the world to shift away from FM radio and to digitalised radio. This shift in the way the radio works is in and of itself a significant media transformation that may mark the end of the traditional radio era. However, it calls for a separate analysis of its own.

The digital platform of the broadcaster, nrk.no, is the third-biggest website in the country by total visits overall and the second-biggest website with a Norwegian domain (Clement, 2022). It hosts the channel’s digital streaming platform, NRK TV. Interestingly, some of the content on the website is also available in Sámi (NRK, 2022a). According to the Sámi Act, the Sámi language has an equal status in the country as Norwegian and is one of the de facto official languages (Marjomaa, 2012). Since Sámi is not among the languages available on Netflix, the research focuses solely on the comparison of the Norwegian language.

The NRK streaming portal is only accessible in Norwegian, without English localisation. Furthermore, in order to access the content itself abroad, users must prove that they possess a Norwegian ID. This drastically limits the outreach of the portal and positions it as a product designed solely for the Norwegian market. Nevertheless, this does not impact NRK's popularity as a digital media platform in the country. According to the former Director-General of NRK, Thor Gjermund Eriksen, it is one of the most popular streaming services in the country (Leverly, 2022).

Regarding its integration of digital services into the broadcasting network, a statement made by the Communication Department reads:

“The adaptation of such useful services represent a natural development of traditional public service content and are recent innovations that provide the public with content in a more user-friendly manner through the use of new technology.” (NRK, 2022b).

The notions of innovation and natural development appear to echo the idea of media transformations driven by digital technology. The channels on the NRK broadcasting network follow the typical features of linear television – the channel guide can be accessed on the website and the users are able to stream the content live as it airs on TV. However, the users have the option to access the content in a non-linear fashion. The platform contains a large catalogue of international and locally produced films and series. Users are able to access the latest news and the entertainment catalogue on the same page, blurring the lines between scheduled and personalised content. In his interview for the EBU, Eriksen also emphasised the strength of SVOD platforms such as the digital service offered by NRK over its linear equivalent, particularly in regard to the younger demographic groups (Leverly, 2022).

In 2019, the NRK TV streaming platform underwent significant user interface changes. The idea was to improve the inclusivity of the user interface (Doga, 2020). The colour palette and fonts were chosen to provide a well-balanced contrast. Other important aspects to improve accessibility, such as subtitles, sign language, and visual interpretation were also improved upon.

The NRK platform differs the most significantly aesthetics-wise. Unlike the other platforms discussed in the analysis and Netflix itself, NRK uses a warm palette of greens, browns, and pinks as the background and accent elements. The colour palette slowly transitions as a gradient when scrolling down the content. This breaks the illusion of a digital theatre stage that Netflix's black-red design has created. However, aside from the colours, there is a distinct layout that follows similar principles as Netflix.

The NRK TV catalogue layout has three styles which all appear interchangeably – vertical thumbnails (poster-style) (fig. 8), horizontal thumbnails (similar to Netflix), and the large-size highlights for individual content (fig. 9). This altering style allows the viewer to browse the catalogue with more ease. Furthermore, it may promote watchability, as the bigger thumbnails may feature better-known or newer titles that the viewers are more interested in. However, there does not appear to be a clear ruleset as to how the pattern is adjusted.

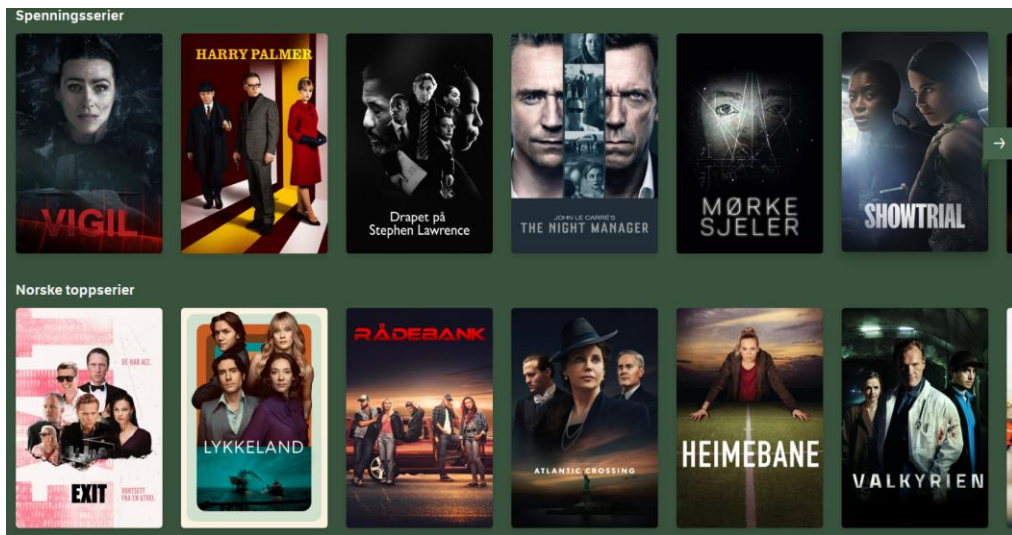


Fig. 8. The vertical catalogue of NRK TV¹.

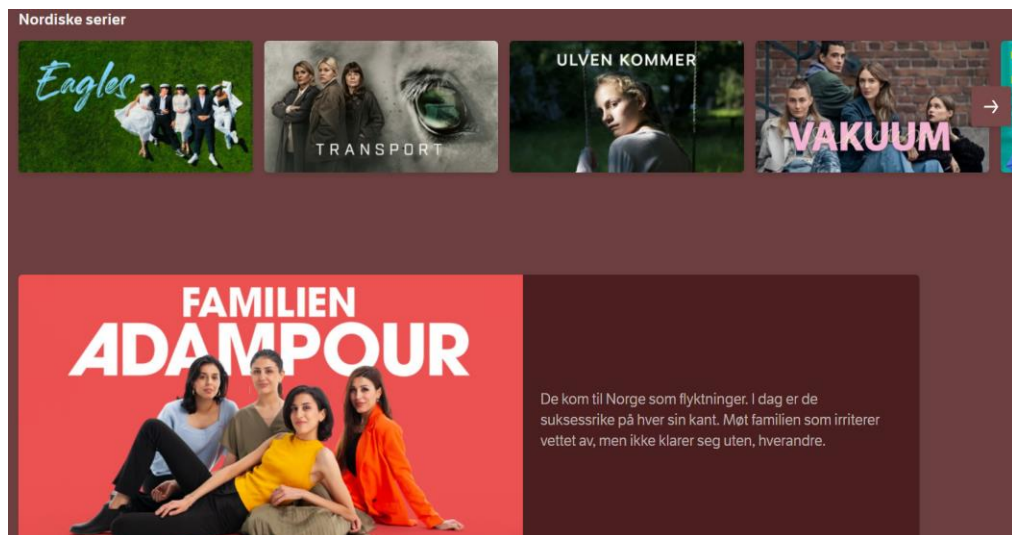


Fig. 9. The horizontal catalogue of NRK TV.

There are some notable aspects regarding the language choice in presenting the content; however, as with the layout, there is no strong discernible pattern to the localisation. The recommendation categories seen on Netflix use little to no English, focusing on presenting a fully localised interface. However, when it comes to the film and TV titles, there is a heavier use of Norwenglish – a combination of Norwegian and English. Initially, there do not appear to be particular rules for which titles should be translated and which may remain in their original title – or in the English translation, as is the case with some of the titles seen in figure 11, such as the South Korean and Japanese series (“Hospital Playlist” and “Alice in Borderland”, respectively). Based on comments made by a representative of Netflix, the titles are usually kept in English for content that aims at a more adult demographic, while the titles of media for family and children are translated into Norwegian (Lundgård, 2021). According to Lundgård, roughly 56% of the titles on Netflix are translated into Norwegian for the appropriate interface. This number is comparable to the translations on NRK TV, where around 55% of the titles are translated (ibid). There are some theories as to why the translation

¹ Spenningsserier - Suspenseful series
Norske toppserier - Top Norwegian series

rate is roughly balanced between maintaining the original title and localising it. According to Jarle Namtvedt, it may be related to the improved English comprehension within Norwegian society (Ellingsen & Grimen, 2014).

However, the reasons for maintaining the Netflix titles in English may be more socially grounded. As new releases tend to trend on social media platforms, such as Twitter, they are often promoted under their original title or its English translation. Netflix, as an American company, invests strongly in promotions in the anglophone markets. Furthermore, since the range of languages for localisation is relatively small compared to Netflix's reach, many users may default to the English platform for convenience. Therefore, maintaining the English titles for the more popular releases may ensure recognition and promote watchability. @NetflixNordic, the official Twitter account for the Nordic region, tweets almost exclusively in English, rather than Norwegian, Danish, Finnish, or any other language spoken in the region. Thus, the content that is being promoted for this particular market on social media is shared in English, with some minor references to regional culture. On the 17th of May 2022, the Norwegian Constitution Day, the account tweeted promoting the Norwegian fantasy series "Ragnarok", and mentioned the traditional dish rømmegrøt. However, the tweet was made in English (fig. 10). This may draw an interesting blending of cultural lines between understanding the regional target demographic and raising a broader cultural awareness among international viewers.



Fig. 10. The Netflix Nordic Twitter account (Netflix Nordic, 2022).

In contrast, NRK TV does not have a strong social media presence. The @NRKno Twitter account appears relatively inactive, with nine tweets posted between January and May 2022, all concerning news and investigations (NRK, n.d.). It is likely that NRK does not need to rely on social media to retain viewership, given its annual performance and status as the national broadcaster.

Similar to Netflix, the categories appear to be based on related recommendations. Some of the featured categories on the main page are "Din neste serie?" (eng. "Your next series?"), using the informal "you", and thus building the idea of a personalised, individual viewing experience that is catered to the user (Appendix 2). There is emphasis on content produced in Norway, with several categories promoting Norwegian productions and culture. Looking at the Netflix catalogue (fig. 11), changing the language settings to Norwegian leads to the "Scandinavian TV series" category appearing in the catalogue. The same category was not recommended by default on the English user interface. However, there appears to be a bigger distance drawn – rather than promoting Norwegian productions in particular, Netflix highlights the Scandinavian category in general.

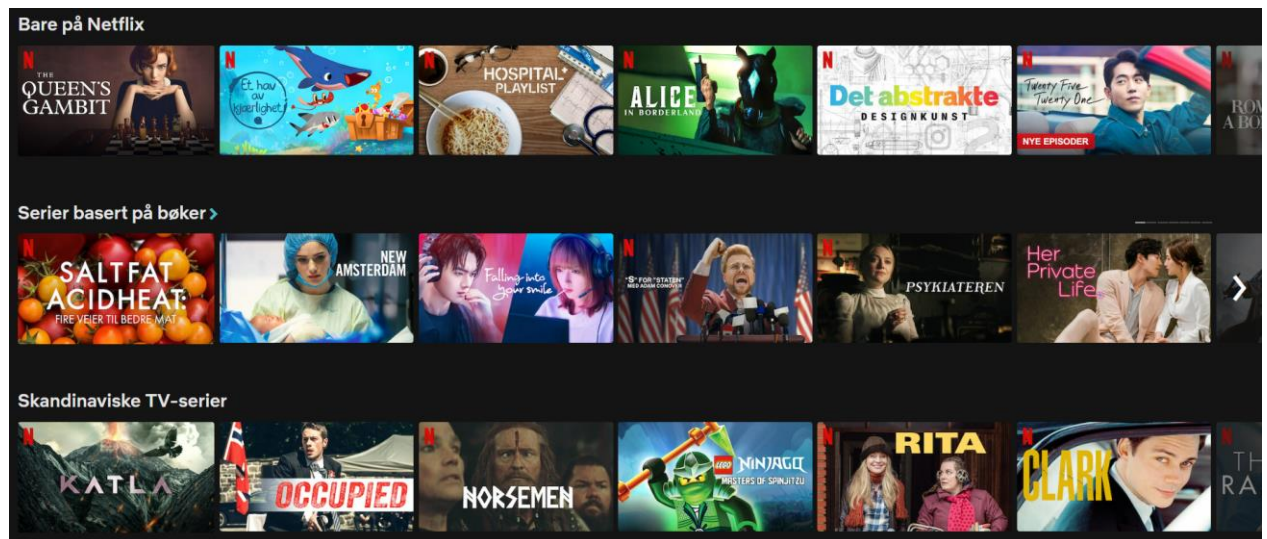


Fig. 11. The Netflix catalogue in Norwegian².

According to Eriksen, it is impossible for local platforms such as NRK to avoid contact with the global tech giants, such as Netflix; instead, there had to be new ways to connect with such platforms. He stated that NRK’s decision to withdraw its content from global platforms was strategic. This way, the local platform is able to hold more exclusive, locally produced content that targets Norwegian society directly. The global platforms, on the other hand, have to rely on a more age-based targeting (Levery, 2022). This makes the playground for NRK, Netflix, and other local and global platforms in Norway more even — one platform cannot hold the vast majority of rights and content over others. It also allows NRK to hold the top 3 positions in viewership and membership ratings, charting alongside Netflix, YouTube, and Disney+ (Stoll, 2022a).

Given its status as a government-owned service, it is highly unlikely that NRK will sign distribution deals with Netflix or any of its competitors. Given that NRK channels are among the most viewed in the country, it is safe to assume that the digital platform will maintain its relevance in the Norwegian market. Furthermore, since Netflix’s first Original production was in collaboration with NRK, with the latter still holding the rights to produce more content, it cannot be ruled out that the platforms can maintain synergy and cooperation without melding into a single streaming monopoly.

3.3. Global Competition: Germany

Netflix became available in Germany, as well as France, Switzerland, and a few more European markets, in September 2014, alongside the premiere of a number of Netflix Original products. There were initial concerns with launching Netflix in this market. Ian Maude, representative of the media consultancy Enders Analysis was quoted by Kelion (2014), stating that the German market’s low willingness to pay for streaming services could make the integration process more complicated. Furthermore, given Germany’s standards of dubbing content rather than using subtitles, was seen as a potentially pricy process of localisation (Meyer-Dinkgräfe, 2006).

² Bare på Netflix - Only on Netflix
 Serier basert på bøker - Shows based on books
 Skandinaviske TV-serier - Scandinavian TV series

It is important to note here that German-language Netflix covers three key regions – Germany, Austria, and Switzerland, known as the DACH countries. There are sociolinguistic nuances regarding the dialect vs. language discourse regarding Austrian German and Swiss German as compared to the Hochdeutsch. However, for the sake of clarity, this discourse is not delved into in this research. Since the RTL+, which was used in the analysis, is a German platform, its equivalent Netflix locale will be referred to primarily as the German Netflix, or Netflix DE. Nevertheless, the market coverage of three centres is worth keeping in mind given the cultural implications. Switzerland is a multilingual country, with German being one of the official languages. Although it is not uncommon to use the term DACH to describe the German-speaking region in Central Europe, it may lead to the uneven cultural representation in terms of one market being more dominantly presented than the others. Furthermore, the German dubbing and subtitling takes place in Munich, meaning that the Hochdeutsch influence is culturally stronger in the region (Vieželytė, 2019).

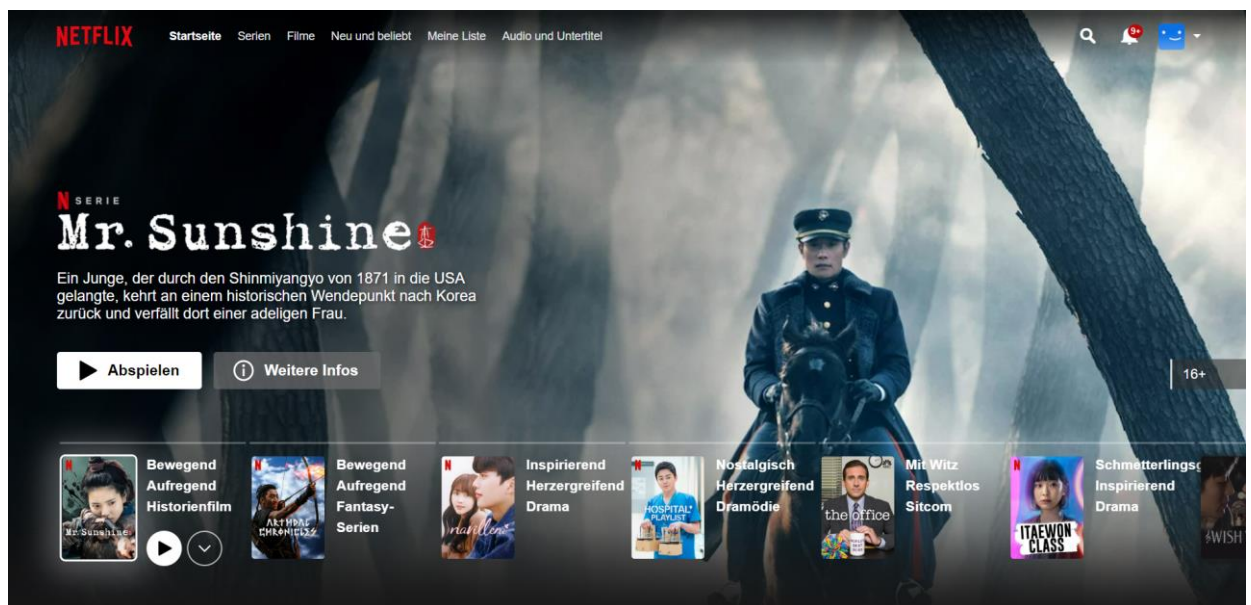


Fig. 12. The user interface of Netflix in German.

The expansion into the German market was not without issues. After becoming available in the region, Netflix began a lengthy legal battle with the Filmförderungsanstalt (FFA), the national film funding institution in Germany. According to the German Film Law, all streaming services in Germany must contribute a levy based on the annual revenues in Germany if they exceed €500,000 (Blaney, 2019). While Netflix argued that it is not considered to be a German company as its European headquarters are in the Netherlands, the European Court of Justice ruled in favour of the FFA. This means that Netflix must annually contribute to Germany’s film productions, even if the platform does not hold rights to produce and distribute the content in question. This means that by providing services in Germany, Netflix may directly contribute to the content created and distributed by its local or global competitors.

While there were a few OTT market competitors prior to the arrival of Netflix, such as Amazon and Sky Deutschland (Kelion, 2014), some of the prominent TV networks in the country, namely RTL, had successfully established their streaming platforms. RTL is part of the RTL Group, an international broadcasting network that also functions in several other European countries. According to a recent

survey, RTL was among the top three most-watched TV channels in Germany overall and the most popular channel among the 14–49-year-old demographic (Koptuyug, 2022).

RTL+, initially known as RTLnow, was launched in January 2007. The platform contained rebroadcasts of the news and entertainment shows airing on the RTL TV channel, as well as films and series that the channel held rights to broadcast. The access to the platform is restricted as users must be logging in with a German IP address. Over the years, the RTL digital platform underwent several rebrandings, the most notable of which occurred after Netflix entered the German-speaking market. RTL went through a complete revamp of its user interface in late 2021 (Deutschbein, 2021). This included changing the name of the platform to RTL+ and altering the visual layout of the site.

Prior to the interface changes, the design of the RTL platform heavily featured the colour blue (fig. 13). While few visual sources of the old interface remain online, the available examples show that the design was streamlined differently from the new interface, with larger thumbnails and more focus given to the RTL Group channels for linear TV streaming. Based on the upper toolbar, the platform was solely focused on the live streaming and broadcasting of linear TV programming, with no original content available exclusively online. As with the current platform, TVNow was available only in German.

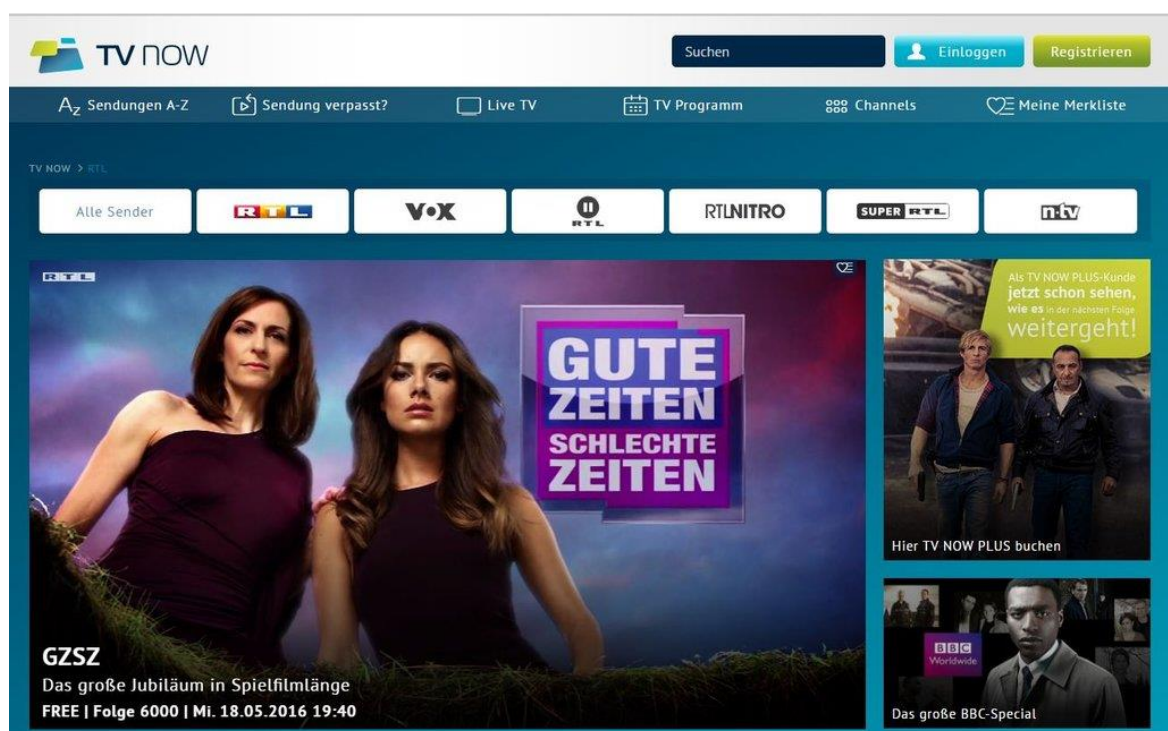


Fig. 13. The old RTL+ (then TVNow) interface (Richter, 2016).

The launch of the upgraded RTL+ was strategic, particularly with the growing access to foreign streaming platforms in Germany. The new platform is set to act as a competitor to global streaming platforms, including the ones available in Germany, like Netflix, Amazon Prime, and Disney+ (Roxborough, 2021). Similar to how Netflix set the stage for streaming platforms in 2007, RTL+ may aim to create the new standard for user experience in audiovisual media streaming, encompassing not just films and series, but also music, e-books, and other digital content. The change was accompanied with the launch of the new user interface. While the platform remains under the TVNow domain, the branding has been altered.

Notably, the platform does not have any strong accent colours, aside from the pink, purple and green in the brand logo. However, the general user interface palette appears to take inspiration from Netflix by using a dark grey background and white font. It also uses the same horizontal carousel with arrows that allows the user to see more titles available under the categories.

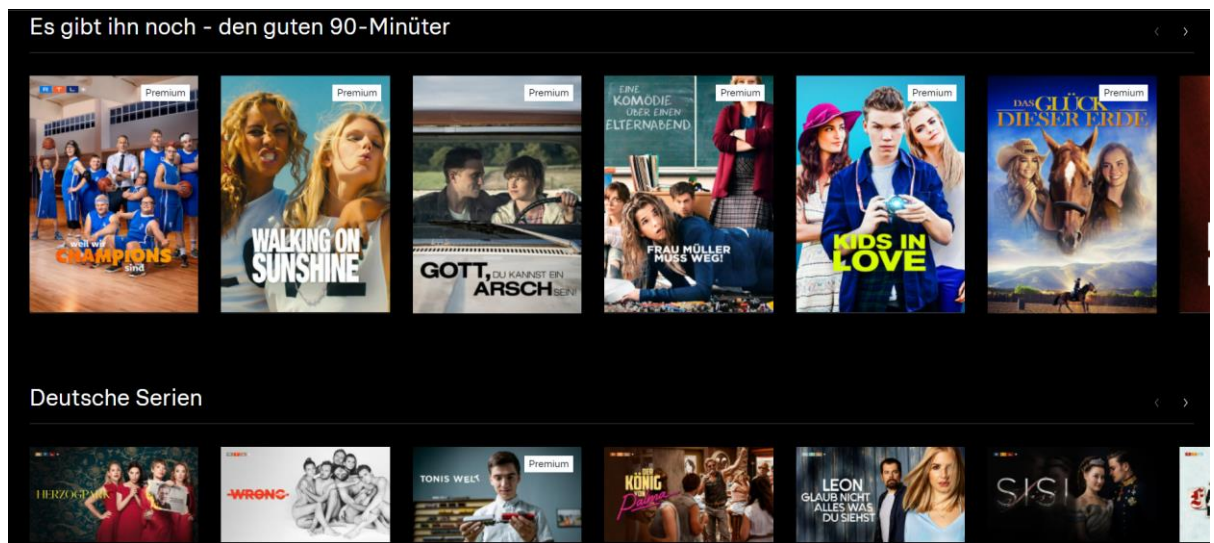


Fig. 14. The RTL+ catalogue³.

RTL+ puts a considerable emphasis on German productions. The catalogue provides separate categories for German films and TV series, as well as RTL+ original productions. Furthermore, as a digital TV platform, the catalogue also has easy access to the news and live broadcasts. Livestreams of the RTL Group channels are available on the platform, allowing the viewers to follow the linear programming alongside the SVOD content. Both the TV content and the individually streamable content are available under the same plan, making RTL+ a multi-functional platform that serves the role of both a news broadcaster and the provider of personalised entertainment and has been described by the Co-Chief Streaming Officer Henning Nieslony as a hybrid product (RTL Group, 2020). Much like Netflix, RTL+ Originals include TV series, films, and documentaries that are exclusively available on the platform.

In early 2022, RTL signed a deal with Warner Bros. Entertainment which grants the German platform exclusive rights to stream the production company’s content, as well as grant the users access to the media available on the HBO Max platform (Roxborough, 2022). This deal helps RTL maintain its goal of focusing on local productions while providing international content that the users may be interested in, particularly given the global recognisability of the titles under the Warner Bros. umbrella. Furthermore, it blends the lines between a fully local streaming platform—the region-locked RTL+—and the global competition. HBO is one of Netflix’s biggest competitors as it is also an American company; furthermore, HBO was one of the cable networks that Netflix served as an alternative for when it began providing its streaming services.

In the years since the DACH region joined Netflix’s streaming network, the company has produced local content as part of the Originals program. Perhaps the most significant release was the sci-fi

³ Es gibt ihn noch - den guten 90-Minüter – they still exist, the good-old 90 minute films
Deutsche Serien - German series

series “Dark”. According to Netflix’s CPO Greg Peters, more than 90% of the views for the series came from outside of Germany, making it one of the most-watched non-English series at the time (Roettgers, 2018). “Dark” was developed by a German team and was inspired by the creators’ experiences of living through the aftermath of the Chernobyl nuclear disaster in 1986, which they described as a “very German, or European, feeling that Americans don’t get because they never had fallout like that.” (Rogers, 2017). Despite the cultural nuances, the show was produced with the global outreach of Netflix in mind, given the show’s debut after the mass expansion. The nuances of a niche regional culture were seen as accessible enough for the global audiences, proving the accessibility of non-anglophone content.

Interestingly the German market was also chosen for a regionalised recreation of Netflix’s own original series. In March 2022, the platform debuted “Queer Eye Germany”, a remake of the American lifestyle reality TV series. The show is a spin on the makeover genre, where five LGBTQ+ consultants assist people in changing various aspects of their lives, from appearance to mindset. The initial American series had a season filmed in Japan, featuring the same team of Western (American, Canadian, and British) consultants. However, this version of the show received backlash for its portrayal of Japanese culture and strong push towards Western-centric, individualistic ideals that can appear culturally tone-deaf (Noman, 2019). Steven Wakabayashi (2019) wrote a critique of the way the show showcased Japan, detailing the way it promoted cultural stereotypes, ignorance, and misrepresentation of Japanese society, particularly its marginalised groups. According to Wakabayashi, throughout the season, some episodes involved serious misunderstanding of Japanese cultural norms regarding communication and politeness, reinforced harmful stereotypes, and engaged in forms of microaggression. The series can be perceived as the bigger problem of what Netflix’s global expansion may lead to – places that are significantly culturally different from the Global North, with value systems that do not align with the Western ideals, can be misrepresented via the Western lens. Furthermore, the easy access to American productions on Netflix can lead to the Western cultural and societal norms being presented as the default, and other cultures being shown as deviations. For this reason, the German version of the Netflix Original could be perceived as an attempt to adjust the trajectory of the expansion. Rather than sending the team from the North American series to other countries, a local team is created to produce a similar product under the same label. However, now, the product applies to the local standards and meets the social and cultural norms of the region. “Queer Eye Germany” can be seen as more reflective of the German societal issues and cultural norms. Although both the US and Germany are within the scope of the Global North, the two countries still have significant cultural differences. As stated by the executive producer Christiane Schiek Tajima, while it first seemed that casting for the show in Germany would be easy under the presumption that the public is diverse and open-minded, it proved to be more challenging to find people as open-minded as expected given the success of the US market (Heidmann. 2022). The project can be seen as Netflix trying to create a glocal product: the series was produced in Germany and aims to target the German audience while also being accessible to viewers from abroad, particularly those familiar with the original show.

However, even though the content was produced in Germany, the titles of productions remain anglicised. Both “Dark” and “Queer Eye Germany” are presented to German and anglophone markets without any localisations. The titles of many shows remain untranslated, while the recommendation categories often use a combination of both English and German in the same sentence. Given that both languages are Germanic, it may first appear as just linguistic similarities. However, it reveals a bigger

phenomenon of how the English language and culture are affecting the German media and society's interaction with it in digital spaces.

There are few distance indicators on RTL+, particularly compared to NRK, which used several instances of the informal “you”, thus reducing the distance between the viewer and the platform, or its algorithm. However, in the few instances where such indicators are used, the informal “you” is chosen, such as the “Deine persönlichen Empfehlungen” (eng. “Your personal recommendations”) category, which likely follows the same strategy of creating a personalised content viewing experience. Content-wise, this is a notable similarity between the RTL+ platform and the German-language version of Netflix is the language used for the recommended categories.

Both Netflix and RTL+ embrace the use of Denglish, or Denglisch – a combination of German and English. RTL+ also uses wordplay for the recommendations, both in German and by mixing the two languages together (Appendix 3). Denglish labels are more frequently used on Netflix, likely due to its wider global outreach and because the localised version targets three key markets, namely, Germany, Austria, and Switzerland, as well as any other German-speakers globally (Appendix 1; fig. 15). RTL+, on the other hand, is limited exclusively to Germany. However, the presence of English terms scattered across the German content can point towards certain trends of globalisation.

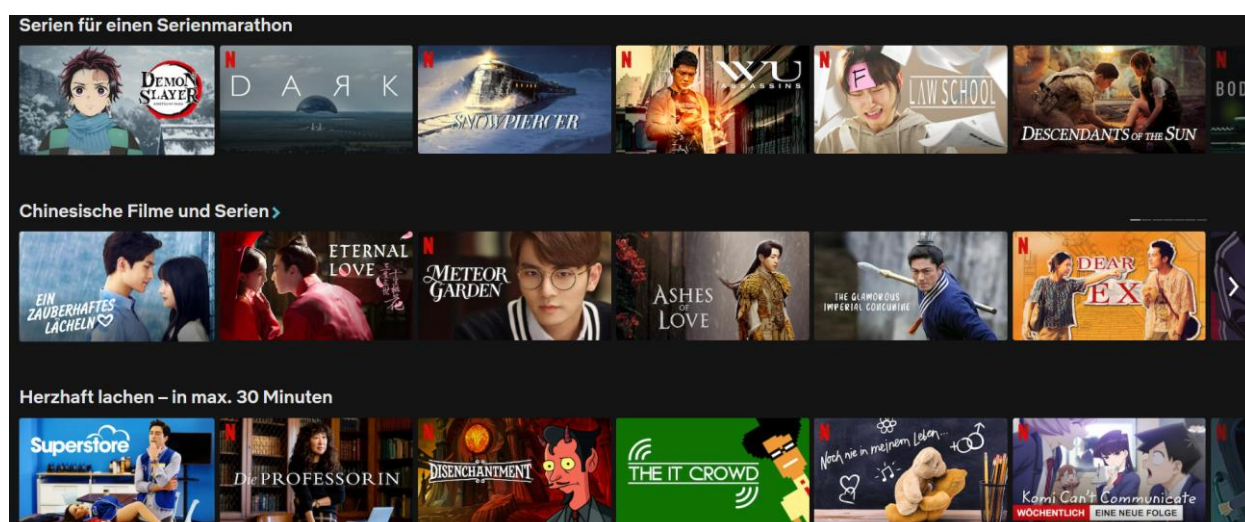


Fig. 15. The Netflix catalogue in German⁴.

Denglish is perceived as a linguistic hybrid that does not follow clearly defined rules but acts as a means of cultural exchange via language. The influence of English on German has been notably rising, particularly since the fall of the Berlin wall and the reunification, as East Germany also adopted a capitalist model. The spread of digital social media platforms and the availability of English content, such as video games or streamable media, online has led to more English terms being adopted into the German vernacular. Most notably, even the German word used to refer to watching content on OTT platforms is “streamen”, an English word that was germanised to fit the context. The impact that English as a lingua franca has on smaller languages has been perceived as threatening the cultural-linguistic diversity, possibly leading to the erasure or overpowering of smaller linguistic groups by

⁴ Serien für einen Serienmarathon - shows for binge-watching / marathoning
 Chinesische Filme und Serien - Chinese films and series
 Herzhaft lachen in max. 30 Minuten - Hearty laugh in under 30 minutes

the dominant English (Dieter, 2004). It is possible that the titles of films are left untranslated for similar reasons as in the case of Norway, given the growing understanding of English and the possible consideration of age demographics. In any case, the interference of English is notable in more aspects of the interface on both RTL+ and German Netflix platforms.

The influence of the English language is prominent not just within the user interface itself, but also in the social communication of both platforms. When it comes to social media communication, Netflix Germany differs significantly from its Nordic counterpart. The @NetflixDE (stylised as netflixde) Twitter account posts updates exclusively in German, with some elements of Denglish. However, the English elements are the most prominent in the content titles themselves (fig. 16). Similar to NetflixDE, the RTL+ Twitter account also tweets primarily in German, with most English interferences appearing to be the titles. It often uses humorous language and pop-culture references that tie into the content that is being promoted (fig. 16).

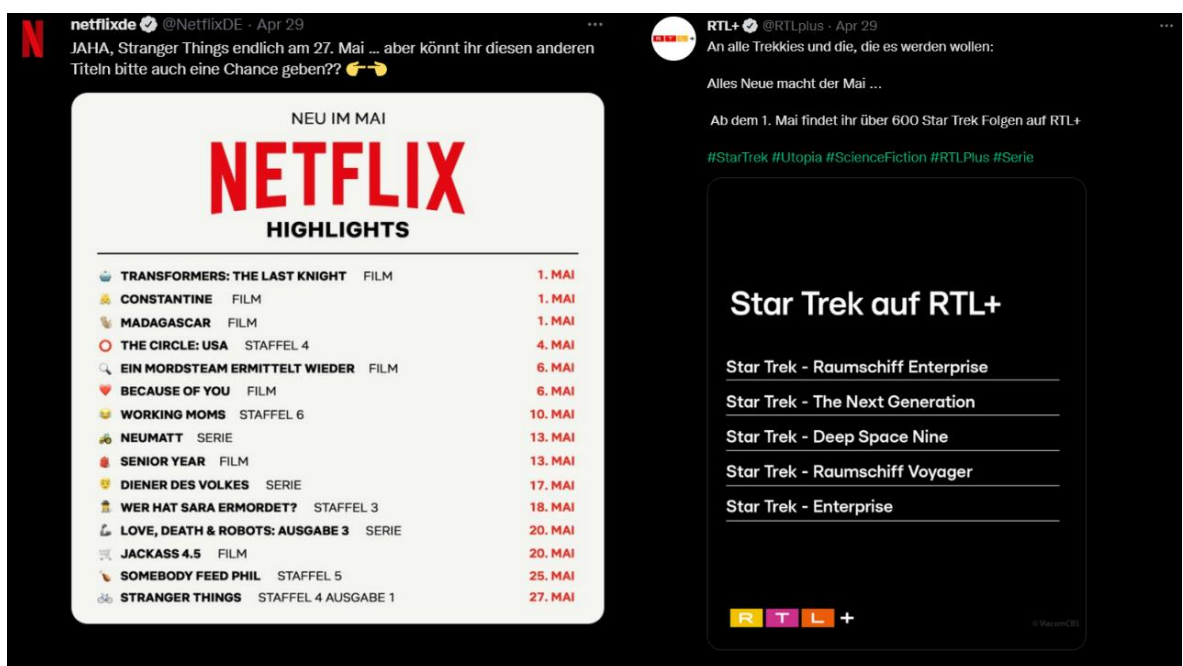


Fig. 16. Tweets from the official Netflix DE and RTL+ accounts (netflixde, 2022; RTL+, 2022).

The current aim of RTL+ appears to be maintaining balance between the platform’s own original content, the access to linear television, and the distribution of the foreign content. According to the CEO of RTL, Henning Tewes, some of the original content has seen good viewership ratings on both the streaming platform and linear TV, proving that the two modes of media consumption can complement each other (Höcherl, Heine & Müller, 2022). While the geolocation limits may restrict the company’s current outreach, there is a possibility of a symbiotic relationship between RTL+ and HBO, leading to the original productions of the German broadcaster becoming available to larger audiences via the HBO platform in markets where it is already accessible. This would expand RTL’s international recognisability and reaffirm the position that the local competitors may pose considerable threat to Netflix’s market dominance. The financing and distribution of locally produced content, the ability to access the news and live sport events, as well as the recent addition of the HBO content not only helps shape RTL+ into a uniquely glocal platform but can also help it maintain a stronger user base and competitive advantage against Netflix. This may also point towards an interesting case of a platform not only making interface changes based on the decisions made by one

of its biggest market competitors, but also aiming to develop a new, improved standard that can expand the possibilities of SVOD platforms in the future.

3.4. Global Competition: The Baltic States

Users in the Baltic states gained access to Netflix during its biggest expansion wave in January 2016. Alongside Lithuania, Latvia, and Estonia, the platform became available in roughly 130 new markets, covering virtually every geographical region. Despite this, as of May 2022, the platform interface itself and the content in the catalogue are still unavailable in Lithuanian, Latvian, or Estonian, limiting the accessibility within the local market. In fact, of the 24 official languages within the European Union, only eight have not yet been used in Netflix's localisation. Aside from the aforementioned three languages, this list also includes Bulgarian, Irish, Maltese, Slovak, and Slovenian. It is unclear as to why their markets have not received localisations; however, it is possibly due to the relative size of the nations and the amount of subscriptions incoming from the regions. However, this may create a closed loop – the platform does not provide the content in the preferred language in a particular region. Thus, the users do not engage with the platform, the subscription counts remain low, and the platform does not receive an incentive to provide the required language localisation.

Research conducted six months after Netflix entered the Lithuanian market revealed that the platform did not perform well, with just 1.6% of the respondents stating that they used Netflix as their preferred streaming platform (Degutis, 2016). The language barrier was among the main reasons for Netflix's lack of popularity. Using local cable and digital streaming platforms was more convenient for the local audience as they were tailored for the Lithuanian market specifically (ibid). In recent years, the number of Netflix subscribers in Lithuania has been steadily growing and surpassed 40 000 users in the first half of 2020 (LRTK, 2021). Compared to 2018 when the platform had around 7000 users in Lithuania, this reveals a growing interest in the platform despite the limitations of optimal user experience.

Upon opening the Netflix website in Lithuania and logging in, users are prompted to an English interface. This can lead to an unsatisfactory user experience. Even if the interface itself is intuitive enough for the user to navigate with limited language capabilities, the content itself is inaccessible as the preferred language options are not available. This can negatively impact the overall viewership and subscription numbers in the region. At the same time, the gaps left by Netflix's lack of accessibility in the smaller markets opens opportunities for local competitors to expand their services and fill up the niche.

Thus, it is not surprising that the audiences in the Baltic states opt for other SVOD platforms, particularly those that were created in the region with this particular target audience in mind. According to data regarding the use of SVOD platforms in the Baltic states, in 2020, roughly 1.3 million people were subscribed to such services (Statista Research Department, 2021). This accounts for about a fifth of the total population in the Baltic states. Based on this data, around 600 000 people used SVOD services in Lithuania, meaning that with 40 000 subscribers, Netflix accounted for just 6% of all SVOD service users in the country.

One of such services which accounts for a large share of subscriptions in the Baltic region is Go3. The service is under the TV3 Group broadcasting network and was launched as an SVOD and TVOD platform in late 2019 (Degutis, 2019). Go3 has seen decent success in a short period from its launch,

garnering over 130 000 subscribers in the region within the first six months of service (Zinkevičius, 2020). This number has continued to steadily grow, more than doubling in under 18 months to 300 000 users (Zinkevičius, 2021). Unlike the other local platforms in this analysis, Go3 comes with fewer regional restrictions. Aside from the three core markets, the platform can be accessed from anywhere within the EU and the EEA. This may position it as a platform with stronger competitive potential against Netflix. In addition to SVOD services, Go3 also acts as a TVOD platform. Not all films and series are available with the base subscription, and certain content can be rented without purchasing a new plan. Go3 also provides access to the TV channels within the TV3 Group broadcasting network, including both local and foreign channels.

Given the fact that the Netflix user interface is not available in Lithuanian, Latvian, or Estonian, it is not possible to compare the cultural aspects of written localisation. However, there are noteworthy elements in the interface design when comparing the layouts of Netflix and Go3. For the purposes of the UI/UX analysis, only the Lithuanian platform was chosen. However, the Latvian and Estonian domains feature the same interface elements, with some regional variations.

The most notable similarity between the two platforms is their use of the colour palette. Both platforms have a similar interface that uses a black or dark grey background and red accents. The top of the page is dedicated to highlighting one production – it may be a recent release or content that the user may enjoy based on their viewing history and recommendation algorithm data (fig. 17, fig. 18).

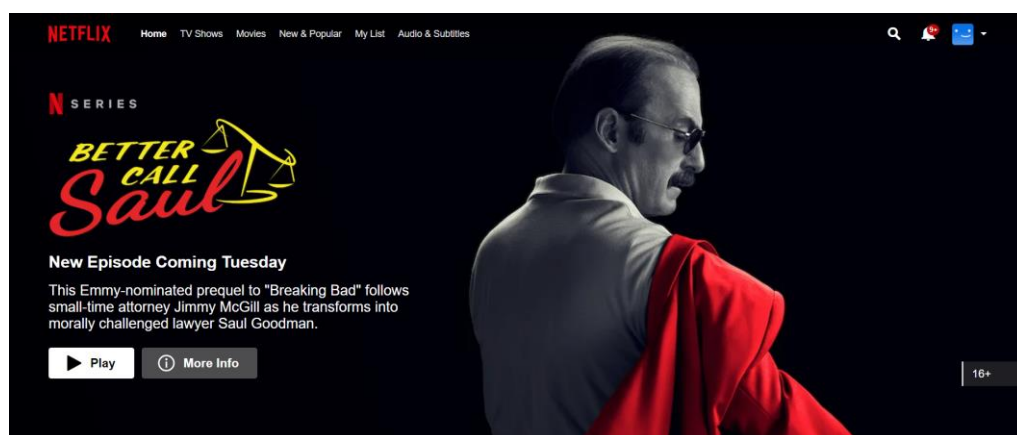


Fig. 17. The highlighted section on Netflix.



Fig. 18. The highlighted section on Go3.

The catalogue also presents some similarities between the two platforms. The layout follows similar principles of horizontality (Appendix 1). The content is grouped in categories based on relevancy. However, there are two notable changes to the interface on Go3. The first one is the position of the thumbnails. While Netflix uses horizontal thumbnails in the catalogue, the Go3 thumbnails appear in the typical poster format (Appendix 4). Here, users can also spot a similarity with YouTube. Similar to the hover-to-preview mechanic discussed in 1.4 User Interface and User Experience, hovering on the poster thumbnail expands it to a horizontal preview that, in some instances, plays the trailer for the content (fig. 19).

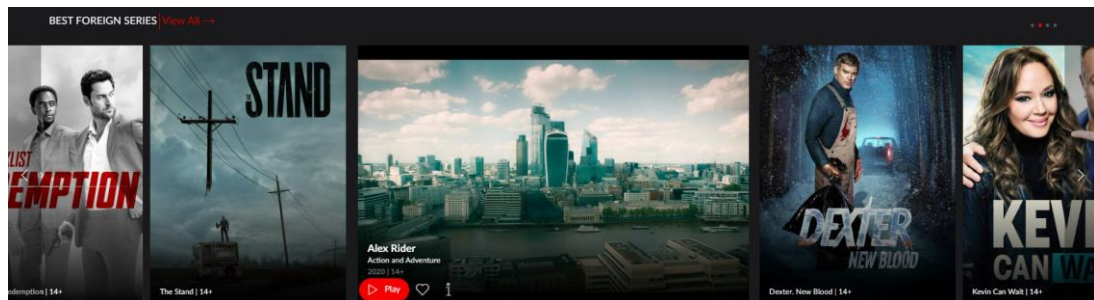


Fig. 19. Hover-to-preview mechanic on Go3.

The second notable difference is the language used for the categories themselves. The content catalogue on Go3 appears to be more formal and distanced from the user compared to the language used on different Netflix locales or NRK and RTL+. There are fewer categories based on personalised interests or viewing history. Instead, they tend to emphasise the production company, i.e., categories for Paramount+ or Disney content. Other common types of categories are related directly to the genre. There is one instance of the formal “you” (Appendix 4). Otherwise, the language is maintained neutral. Interestingly, when the interface is switched to English, it also creates a stronger location neutrality for recommendations. The category “Naujas ir populiarus lietuviškas turinys” (en. New and popular Lithuanian content) is localised as “New & trending local content”. This category is also localised in the same manner on the Latvian and Estonian domains. It is possible that the decision was made to make the content more inclusive for subscribers who may be using the service from other regions.

Similar to Go3, Netflix also provides region-specific recommendations. Although the platform’s interface has not been localised for the markets, the geographic location is recognised by the recommendation algorithm. In this instance, Netflix offers categories for the top 10 films and series in the country which updates daily (fig. 20). These recommendations are based on the watchability statistics based on the region. However, this is the sole regional recognition on the platform. At the time of writing, there is no redistributed or original content available on Netflix that would be produced in either of the Baltic countries, further deepening the gap between the platform and its intended audience in the region.

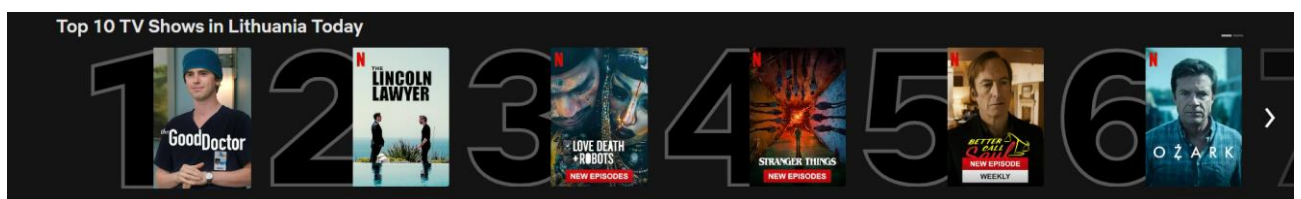


Fig. 20. “Top 10 TV Shows in Lithuania Today” recommendation category on Netflix.

Netflix's influence on the design and interface of Go3 is also visible within the frames of the content. Netflix productions start with a logo animation – a red ribbon comes into the shape of an N and then scatters into a range of colours (Appendix 5). Go3 has three logo variations, used both for media promotions and the content itself (Appendix 6-8). The most notable similarity is the logo itself – the design of the 3 is shaped somewhat similarly to Netflix's N, although the Go3 logo is accompanied by additional text. The animation for Go3 Originals (Appendix 6) consists of red ribbons moving across the screen, as the biggest ribbon forms the shape of 3, reminiscent of—albeit more fluid than—Netflix's ribbon animation.

It is also worth noting the logo of the platform adjacent to Go3, TV3 Play. This platform provides a digital television service, following the linear TV model. Users can choose to watch the livestreams of the TV3 Group channels or access the reruns of the same content. Since users that have a Go3 account can also access TV3 Play, the platforms can be used concurrently. This model performs similarly to RTL+ which also allows users to access both linear television and SVOD services. The TV3 Play platform uses a very similar logo to Go3, namely by using the same design model of 3. Here, the similarity to the Netflix logo is more pronounced due to the solid black background (Appendix 9). The logo design may create a sense of familiarity in the user's mind, correlating the Go3 platform to the other streaming service and perceiving Netflix as a prototype. Go3 was developed three years after Netflix became available in the Baltic market. Thus, it is very likely that the American platform was used as the general standard for how the local product should look and work. That being said, it is important to note that the platform does not plagiarise Netflix and merely follows a similar user interface template as all platforms analysed here.

In terms of social media interactions, it is not possible to equally compare the two platforms. Netflix in the Baltics is still a seemingly overlooked region. There is no designated Twitter account for the region, as was the case with Netflix Nordic. In fact, there is little to no social media presence specifically in the Baltic region. It is possible that the opening of the new CEA office in Warsaw will also bring a stronger presence in the region and integrate the Baltic countries more into the Netflix ecosystem, both in terms of localisation and content production. Similarly, Go3 does not have an official Twitter, either. This may be due to Twitter's lack of popularity in the region. Instead, social engagement is focused on Facebook, while the overall brand recognition is amplified via digital advertisement, as well as commercials on the linear TV network channels under the TV3 Group umbrella.

The popularity of Go3 in the Baltic market is driven by the recognisability of the brand name, given the popularity of channels within the TV3 Group. However, the content offering also plays an important role. For starters, unlike Netflix, the Baltic platform offers Go3 Originals – content produced in one of the three countries, available exclusively on the streaming service, as well as the TV network. Much like Netflix, the company produces original content while promoting the growth of regional awareness – viewers can watch original content from the Baltics which they may not be able to access otherwise. This fills the niche caused by the lack of Lithuanian, Latvian, and Estonian content on Netflix. The content may also be less homogenous compared to Netflix's productions, as seen in the analysis of the German market, as TV3 Group is a European company and thus the productions are not perceived via an American lens.

Perhaps the biggest advantage that Go3 holds over Netflix in the Baltic markets is the access to the Disney catalogue. This is thanks to a deal between the Walt Disney Company and the TV3 Group which was signed in 2020 (Thomson, 2020). It was announced in 2017 that Disney would be launching its own streaming platform and start removing its copyrighted properties off the Netflix catalogue (Kastrenakes, 2017). This left a dent in Netflix's catalogue, even leading to some of the original platforms moving to the Disney+ platform in 2022 (Wu, 2022). Given the amount of intellectual property under Disney's ownership, the deal with Go3 gives the platform a big advantage over Netflix in the local market. It has established that the TV3 Group holds rights to distribute, stream, and otherwise broadcast the content produced by Disney or its subsidiaries. The relationship between Go3 and Disney may put pressure on Netflix's localisation plans. The Go3 platform puts a lot of emphasis on the Disney animated content, which is provided with both dubbing and subtitles. This makes the platform a preferable option for families. Netflix's lack of dubbing provided in the three languages makes the platform inaccessible to this demographic. At the time of writing, Netflix's catalogue only appears to offer two films with both Lithuanian dubbing and subtitles – "The Mitchells vs. The Machines" and "The SpongeBob Movie". This is severely lacking compared to the extensive dubbed Disney content available for the Baltic viewers on the Go3 platform.

At the same time, the availability of Disney content on the platform reinforces homogeneity of content. As the platform strongly promotes Disney productions, local creators must compete with this more globally recognisable intellectual property. This may lead to the local content receiving less attention from the viewers and being overshadowed by big-budget foreign productions. Such concern may grow even further as Disney+ is expected to become available in the region in the near future. As of May 2022, Disney+ has not been made available in the region, and the distribution rights are still maintained by the parent company of Go3. However, according to a report published by the Walt Disney Company, the Disney+ streaming platform is set to launch in the Baltic states alongside 50 other territories in summer 2022 (Holland & Etaghene, 2022). It is unclear how this launch may affect the copyright agreement between Disney and the TV3 Group. There are several possible trajectories for Go3 with the arrival of Disney+. The first one would act similarly to the RTL+ and Warner Bros contract. The licensed content can be accessed on the same platform, possibly for an additional fee, expanding the content availability on a single platform. The second possible scenario would be Disney acquiring the rights to Go3 and creating a subsidiary platform for the Baltic market. This would strengthen Disney's influence on both linear and digital television and impact the status of other broadcasting networks in the region. Another possibility would be the negation of the current agreement between Disney and the TV3 Group. This would likely negatively impact Go3's overall catalogue and remove the strong advantage that the platform currently holds over Netflix. At this point, though, all scenarios are just speculation, and it is not possible to definitively predict the outcome of Disney+ entering the Baltic market.

Given the strong competitiveness demonstrated in the markets where both Disney+ and Netflix are available, it may make it more complicated for local platforms such as Go3 to maintain their relevance and user base, particularly if Disney+ offers dubbed and subtitled content in the target languages. However, during the time of this research, any attempts to discern possible market shifts cannot be reliably backed due to the lack of information regarding the Disney+ launch. It can only be safely determined that Go3 remains the more popular platform in the region, largely due to its brand recognition, localisation, and selected content catalogue which is more family-friendly. Further analysis into Go3's trajectory may be relevant after Disney+ joins the regional market.

4. Discussion

The impact that Netflix has had on the streaming market as a whole can be depicted not just in revenue numbers or subscriber counts but also in the way it has led to a unique standard of SVOD platforms, as pictured in the examples provided in the analysis.

The following section discusses the research outcomes and determines the role that Netflix has played in the success and further development of NRK, RTL+, and Go3 platforms. The first part of the discussion covers the current state of the global and local SVOD market and what technological advancements have led to distinguishing it from linear television.

The second part of the discussion investigates the prospects of digital streaming. It delves into how the increased market saturation can affect the heterogeneity of content production, as well as Netflix's possible trajectory given its growing competition and recent business decisions that have led to some negative feedback.

4.1. The Current State of SVOD Platforms

In the six years since Netflix became available in the entire continental Europe, the platform has firmly taken the spot of the largest SVOD platform in the region. As can be seen in the analysed examples, the local platforms that compete with Netflix either launched or were upgraded after the 2012-2016 expansion period. The processes of adapting to Netflix's playing field involved updates to the user interface, acquisition of rights to more exclusive content and, in the instance of Go3, additional localisation into English which can allow the platform to be accessible outside of the Baltic region.

As the pioneer in the market, Netflix has evidently affected not only the way content is streamed, but also the way that it is presented. As seen in the examples, the user interfaces of all three local market platforms, particularly Go3 in the Baltics, share visual similarities with Netflix, albeit none of them outright plagiarise Netflix. One of the main reasons for this design decision could be recognisability. Netflix is the biggest streaming platform in Europe, with a revenue of over 5 billion euros in 2020 (Stoll, 2021b). As established in 1.4 User Interface and User Experience, Netflix has been regarded for its UI/UX design and user friendliness. The structure is simple – the top left menu provides categories for TV shows, movies, new and popular releases, user's personalised list, and, as of recently, language options for audio and subtitles. The top right corner provides access to the account settings. The interactive object on the page is the highlighted content, which is typically a new release or a close match based on the user's preferences. Upon scrolling down, the user can view the different recommendation categories, some of which can be personalised using the algorithmic data. Some smaller highlights, like the daily regional top 10, are also emphasised to encourage engagement with the most popular content.

Of the three comparative platforms, NRK shares the fewest similarities due to the chosen colour palette. The colour range varies between warm and cool tones, without causing eye strain or visual irritation. RTL+ and Go3, on the other hand, appear more visually similar to Netflix. RTL+ was redesigned in 2021, while Go3 launched in 2019, several years after Netflix entered the German and Baltic markets. Thus, the user interface of the two platforms can make it easier for new users that already have experience with Netflix's UI to interact, creating a positive and straightforward user experience. At the same time, since both commercial platforms have contracts with different

distributors (Warner Bros. for RTL+ and Disney for Go3), and given their extensive services, such as RTL's upcoming multimedia package and Go3's TVOD option, it can be assumed that the platforms are interested in further international expansion. This, in turn, can lead to some concerns regarding SVOD platform homogeneity, both in terms of the user interface and content development, the latter of which is discussed in 4.2 The Outlook of Streaming.

For RTL+, the new design was a significant change from the old interface, showing clear influence by the Netflix UI. Research conducted by Cyr, Head & Larios (2010) revealed that Germans tend to prefer the colour blue in website design, which was the predominant palette for the old TVnow interface. Thus, the shift from blue to black appears to stray from what could perhaps be described as a cultural norm. The overall layout was also changed, now matching closer to Netflix's. While the menu is smaller and located towards the top right side of the screen, there is a bigger highlight for ten recommendations, which is then followed by individual recommendation categories below. These recommendations are focused on the streamable content rather than the linear television, which can be accessed via the menu on a separate page. Compared to the old interface, this gives a bigger priority to the SVOD service rather than the TV live streaming. There are also separate categories for content produced by RTL and foreign productions, retaining some emphasis on local shows and films over the non-German intellectual properties.

Go3 shares the strongest user interface similarities with Netflix, both in its brand presentation and the platform itself. The colour palette is particularly reminiscent of Netflix's, and the top menu follows the similar structure of general categories on the top left side and the search function as well as the profile settings on the top right. The highlight preview plays a muted trailer of a new or recommended production. The trailer autoplay can also be seen with some of the new release highlights on Netflix. However, it is usually not possible to predict which type of highlight preview the user will access when they open the platform. The categories below the preview are more generic than

Thus, it can be seen that Netflix has had a strong influence on how SVOD platforms are developed and what user experience they create. Localisation plays an important role, particularly in markets where Netflix is not available in certain languages – users are more likely to interact with a product the easier it is for them to access it. If Netflix chooses to localise the platform in the Baltic states, it can also play to its advantage. For example, users that are familiar with Go3 would likely easily transition to Netflix's service due to the similar UI. According to Cao, Zieba & Stryjewski (2015), familiarity is crucial in ensuring a good user experience. When users encounter an unfamiliar interface, they use their prior experience to attempt to navigate it. Therefore, the consistency between the different platforms can make the adaptation process better streamlined and ensure that the user experience is positive.

There is one notable aspect of the three competitor platforms that does not apply to Netflix. Upon visiting the three platforms, the user is able to preview the full catalogue of available content. This may be related to the TV origins of the platforms – much like the scheduling of linear television, the licensed content availability is presented for user's convenience. However, the content on Netflix can be previewed exclusively only after creating an account. This may make the local competitors more approachable. Seeing what their options are, the users can make an informed decision whether the content matches their interests. It can also create a smoother user experience, as it removes several steps in between accessing the content.

The blurring of lines between analogue, cable, and digital television and media distribution has led to an increase of choice. Users are able to make their own individual decisions regarding the content they prefer in addition to having an opportunity to follow along with the scheduled content. The three platforms in Norway, Germany, and the Baltic states promote a fusion of television and streaming by allowing users to access the content either live or to stream. This hybridisation is an interesting point in the current stage of media transformation – it does not appear that television is being eliminated. Instead, it seems to be merging with the digital space, creating a brand-new form of media interaction whose final form may only be clearly defined in the foreseeable future. Given the role that NRK played in transforming the radio into a fully digital media mode, the digitalisation of television could simply follow a similar, yet accelerated process.

Unlike the three competitive platforms, Netflix has introduced updates not just to the user interface but to the content itself. In recent years, Netflix has experimented with the platform's technological capabilities to bring more personalised audiovisual media experiences to the viewer. The 2018 film "Black Mirror: Bandersnatch" featured choose-your-own-adventure mechanics, where the viewer could decide which plotlines they wanted the film to follow. Such a mechanic uses the principles of gamification – the viewing experience is enhanced by allowing the user to directly interact with the content (Denton, n.d.). It does not appear that any platform has attempted to implement gamification in the content since Netflix's experiment. However, the ability to produce an interactive show expands the possibilities of user interface. Gamification via a show may be more convenient on touch screens, allowing the fastest response time by simply tapping to interact. Alternatively, using a gaming console would create a more authentic gamification experience, adding a personal entertainment aspect and kinetically tying the viewing experience to the activity of pressing the buttons on the controller. However, the interactivity of "Bandersnatch" was not universally accessible, as viewers on smart TVs were forced to rely on the auto-select due to technical limitations (Koh, 2019). Thus, in practice, the concept of media gamification requires more refining to provide a satisfying user experience across the board, regardless of where and how the user chooses to participate.

While Netflix certainly had crucial influence on the overall development of its local competitors, all platforms have retained their standout features. They provide more regional content variety, putting emphasis on exclusive local productions. Although Netflix has had success with some non-English content, the vast variety of content does not necessarily always make the foreign productions stand out. The equal treatment of both anglophone and foreign productions can be a double-edged sword. On the one hand, this allows more niche productions to receive the required funding. On the other hand, certain regions are overlooked, making the overall distribution of foreign content uneven. The local competitors that target more specific demographic groups tend to prioritise the streaming of local productions. This prevents the culture and content from the more globally dominant regions from overtaking the platforms completely and promoting a homogenous perspective of the world.

4.2. The Outlook of Streaming

The current SVOD and TVOD market is highly saturated. Depending on their region, users often have at least two or more options to choose from based on their content preferences. As is common in the digital space, SVOD platforms can change rapidly, introducing new updates and features. This can make the future of such services difficult to predict. However, certain trends that have been noted

during the research can help determine possible trajectories of the streaming platforms and what roles they may play in either promoting local productions or blending into the global market.

The growth of SVOD platforms has led to unique technological developments regarding both the user interface and the service provided. As the market saturation intensifies and the competition grows, the platforms must find new ways to stand out and attract the attention of the users. RTL+ stands out by expanding its catalogue beyond the usual SVOD content. The platform aims to be a multi-functional hub, becoming the biggest entertainment platform in Germany. According to Henning Tewes, the upcoming plans for the platform are to include other media such as audiobooks, podcasts, music, and digital magazines (Höcherl, Heine & Müller, 2022). This will lead to a further hybridisation of the different media types, creating an all-in-one media consumption experience that is available on any digital device. If the model created by RTL+ were to catch on, there is a high possibility of both local and global platforms starting to include more content variety. As Netflix so far only offers one type of service, it would require competing for rights to different types of intellectual property. The interconnection of different media types could pose new threats to local productions. While it could create space and funding for new productions, the wide range of companies involved in the copyright process would mean that the content would be affected by the bigger corporations. If many of these copyright owners originate in the US, this would once again reinforce similar issues as seen with Netflix, prioritising the Western perspective over other cultures.

The content development decisions made by a global corporation can raise some questions as to whether the representation is fair and equal across the board. As the example of “Queer Eye” has shown, the Western perspective can appear invasive and disrespectful of other cultures. However, the German version has also received some criticism for feeling too much like the original, with the social behaviours of the participants being influenced by their American predecessors (Heidmann, 2022). With a Brazilian spin-off in production as well (Netflix Brasil, 2020), there may be concerns that the remakes of Netflix’s own original content, particularly if it was initially produced in anglophone countries, will lead to growing homogeneity across the media and an underlying influence of Western cultural and social ideals.

It is difficult to predict Netflix’s long-term trajectory, particularly now. Throughout the course of this research, news has come forward regarding the company’s current standing that may impact its outlook and position as the dominant SVOD platform. In the 2022 Q1 earnings report, it was revealed that for the first time the number of subscribed users had decreased by 200 000. Although the number is relatively small, given that the total user base consists of over 222 million accounts, this led to some discussion on social media as to whether a Netflix membership was worth maintaining. Furthermore, around the same time, Netflix announced that the platform would be cracking down on account sharing – a common practice of users, who are often family members or friends, sharing the same password between each other. Thus, the 222 million is not reflective of the actual number of viewers. There have also been talks that Netflix would start implementing advertisements during streaming. This decision has been received particularly negatively by online communities. The implementation of advertisements would, in a sense, close the loop – many users initially opted to watch Netflix as cable television was more expensive and featured ads. With the recent rise in membership prices and the possible addition of advertisement, Netflix may become the very thing it brought to its knees. This creates a unique shift in media transformation that is as of yet to be observed

– the digital, while not abandoning this space, is adapting more features of the analogue that it overtook in popularity.

The financial aspect is also important for consumers. With the increase of available SVOD platforms and more copyright restrictions and exclusivity between them, users are required to pay for multiple services at once to increase the amount of content they can access. This can be a financial burden, leading to some customers alternating between subscriptions or opting to use a single platform. RTL+ and Go3 appear to follow the strategy of increasing content accessibility on a single platform. When discussing RTL and HBO's agreement, Tewes emphasised the convenience, stating that many users may not want to pay for several platforms at once. Instead of choosing between several international streaming platforms, the German viewers can settle on one platform with a local subscription (Höcherl, Heine & Müller, 2022).

The future of smaller SVOD platforms can also be brought to question. The first two examples — NRK and RTL+ — appear to remain solely in their respective local markets, given the regional restrictions, such as the ID and IP requirements. However, instead, the content is expanding from within, particularly in the case of RTL. The platform has signed a deal with Warner Brothers, allowing it to focus its own resources on local productions while redistributing non-German content to the audiences via the HBO Max library. It is also possible, given the platform's plans to increase its service range with other media types, that the platform will eventually attempt to enter new markets, thus introducing a new SVOD model to audiences, perhaps triggering the next wave of this media transformation process.

Out of the three platforms used in the analysis, Go3 offered the fewest regional restrictions. It can be accessed from anywhere within the EU and the more extensive EEA region. While there is no definitive proof, Go3 may be the strongest contender to attempt to step into the wider market of international SVOD platforms. Since the platform has already been localised into English and is available in a broader region, it could become easily accessible for the entire EU/EEA market where Netflix is the most popular SVOD platform. At the same time, Go3 already holds a major advantage via its subscriber count and the Disney contract. The possible scenarios regarding Go3's future have already been discussed. However, with the backing of Disney+, Go3 may connect linear television with streaming in a broader scope of markets.

The rising influence of American streaming platforms in Europe may cause some concern for maintaining both the pan-European and the local identities. As more local broadcasting networks come to agreements with American streaming platforms to enhance their own digital services, the decision-making regarding content development and distribution may no longer remain local. The US-centric perspective may affect what content can be developed locally. If, for example, Disney has exclusive production and distribution rights in ten EU countries outside of the Disney+ platform, it may lead to a dominant, homogenous, American media perspective which receives more attention and views than the local productions which better represent market diversity and local perspective.

It is also important to note that the platforms analysed here are not Netflix's only competitors in their respective regions, though they are among the biggest ones. Another European platform is looking into an expansion strategy which would increase its recognition in the EU. Viaplay is an SVOD platform owned by the Swedish company Nordic Entertainment Group. As the other examples of digital TV platforms, Viaplay offers both SVOD and linear TV services. The company focuses on

European productions, particularly located in the Nordic countries. According to the CEO, Anders Jensen, Viaplay is a unique player in the SVOD field as it is a non-US platform that focuses on the European content and audiences (Milne, 2021). The platform is already available in several markets, including the Baltic states, and plans to reach a total of 16 territories by 2023 (ibid).

While it is unlikely that Netflix is going to disappear from the social dialogue in the foreseeable future, its position as the strongest SVOD platform in Europe may be challenged as other global companies enter the market and new local competitors adjacent to the linear television join the streaming scene. The lack of localisation in some regions, shrinking catalogue due to intellectual property disputes, and growing interest in alternatives could reshape Netflix's trajectory, in addition to market aspects such as rising prices and IP address restrictions. Although Netflix started out with a massive advantage, it may need to find new ways to adapt to the ongoing media transformation by focusing more on the local markets and even offering new services if it hopes to maintain its status.

Conclusions

1. Netflix has, undeniably, altered the way we interact with media forever. By taking the decision to leverage an open spot in the digital space, it revolutionised media consumption and, unbeknownst to most, triggered a new wave of media transformation – a process that is ongoing and observable to this day, with dynamic fluctuations and shifts that vary between leaning towards the older television traditions and digital borders that have not yet been crossed. This process has led to the development of SVOD and TVOD streaming platforms that offer unique digital services with exclusive content which can be catered either for the regional market or be accessed by audiences abroad as well. SVOD platforms have attracted viewers of traditional linear television, whereas the television itself has started a partial migration. Some of the linear TV services, like livestreams of news or sports, can now be accessed completely only, from any device, as long as the user has internet access.
2. During the transition from a DVD-by-mail service to a digital streaming platform, Netflix underwent the process of refining its recommendation algorithm. This led to the refinement of the entire recommendation system which is now commonly used not just by Netflix but other platforms like Google and Amazon. Furthermore, this may have impacted the growth of the algorithmic culture. Although the issues of invasiveness and potential threats due to datafication of all aspects of society were not discussed here, it may be worth exploring how Netflix's recommendation algorithm can be used to gather data about a customer and build their digital profile, as well as what security risks such technology may pose.
3. Netflix's influence on other SVOD platforms cannot be quantifiably determined. However, by analysing the examples of NRK, RTL+, and Go3 user interfaces, it can be seen that Netflix was used as the benchmark for web design. Furthermore, direct-to-web exclusive content, such as Netflix Originals, could have acted as a catalyst for local production companies to develop exclusive content and launch it on the respective streaming platforms. Some SVOD platforms, like RTL+, are looking into offering more for their users. RTL+ has signed a contract with Deezer for exclusive music streaming services that will be added to the platform in the foreseeable future. Thus, Netflix has had sizeable impact on the user interface and user experience of other SVOD platforms, the business and marketing strategy, and the overall services offered.
4. In terms of specific user interface aspects, all three local platforms use the same layout for the main page. The menus are positioned in a similar manner at the top of the page and one or more productions are highlighted with a call-to-action for the user to press play. The content categories follow the same structure of horizontal rows, with some rows, usually promoting new or special content, being brought forward with larger thumbnails. Most notably, Go3 uses a colour palette of red-black-white, the predominant colours on Netflix. The shared similarities can positively influence the user experience by creating a sense of familiarity and allowing the user to navigate any of the platforms with relative ease, as long as they are familiar with at least one other platform.
5. With the growing saturation of SVOD platforms and more US-based corporations entering the wider markets with their services, there is a notable competition between distributors to gain rights to certain intellectual properties. However, Netflix's impact here is not as

straightforward. With Disney and Warner Brothers, among other companies, launching their own streaming platforms, Netflix has lost rights to a sizeable amount of content. To ensure that they can hold a market advantage, some platforms, like RTL+ and Go3, sign contracts with the big production companies which allow them to redistribute the content. Therefore, while Netflix itself may not have impacted the current situation with content distribution, the market that arose after Netflix's success is strongly affected by the changes in content availability.

6. The future of SVOD platforms as a whole and Netflix in particular cannot be clearly determined due to market events. While Netflix experienced a dip in memberships at the start of 2022, it may be too early to predict a trajectory towards deterioration. However, it can be said for certain that SVOD platforms are going to remain within the current media landscape. Furthermore, with technological advancements like NRK's fully digital radio and RTL+'s multi-media streaming platform, it is too early to declare that the peak of the current media transformation wave has been reached. There are some concerns regarding how the local market competitors will be affected by the expanding reach of other North American streaming platforms. This research should be revised in the future to compare market shifts and global trends of SVOD platforms in Europe.

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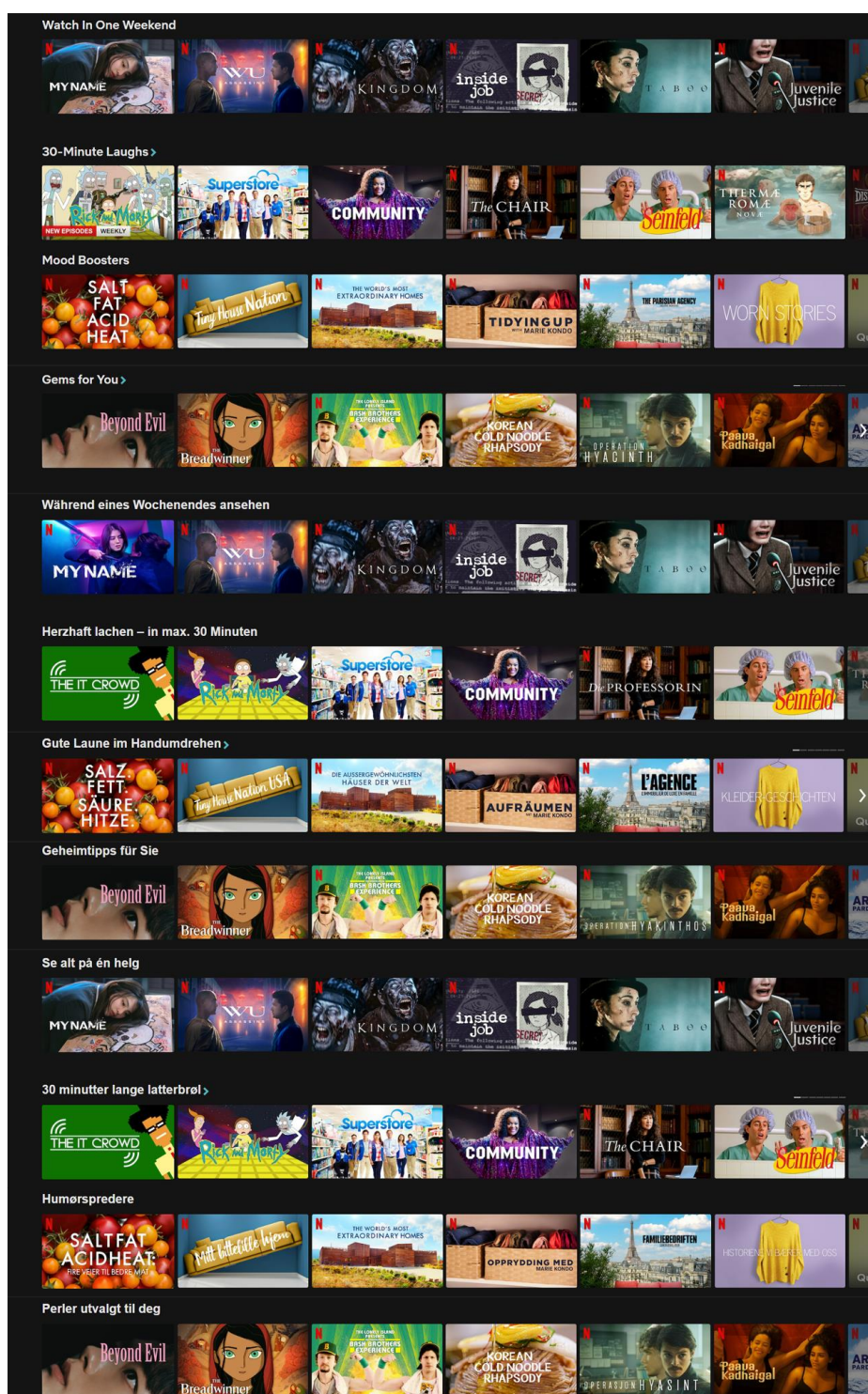
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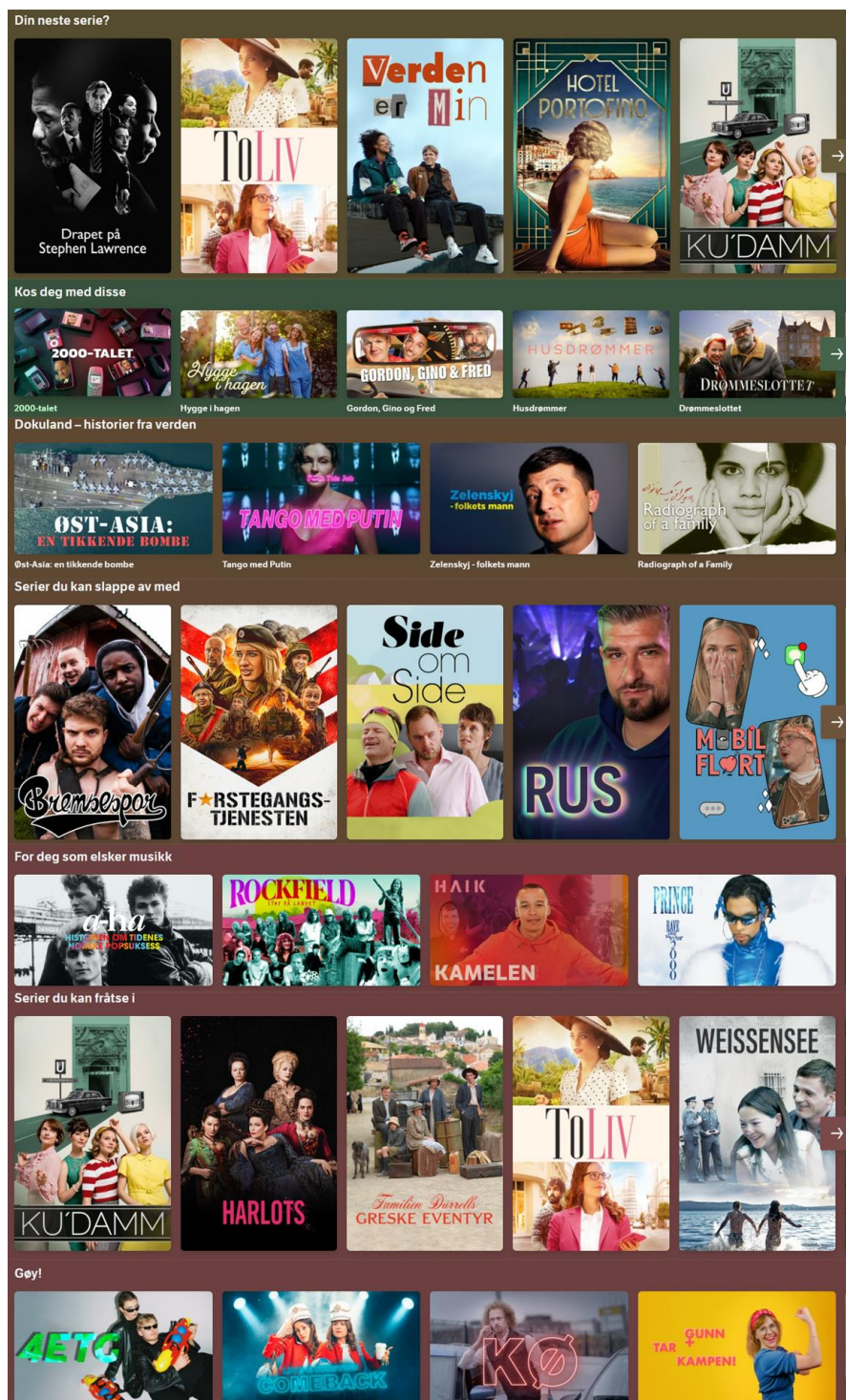
Appendices

Appendix 1. Examples of the content categories on Netflix.



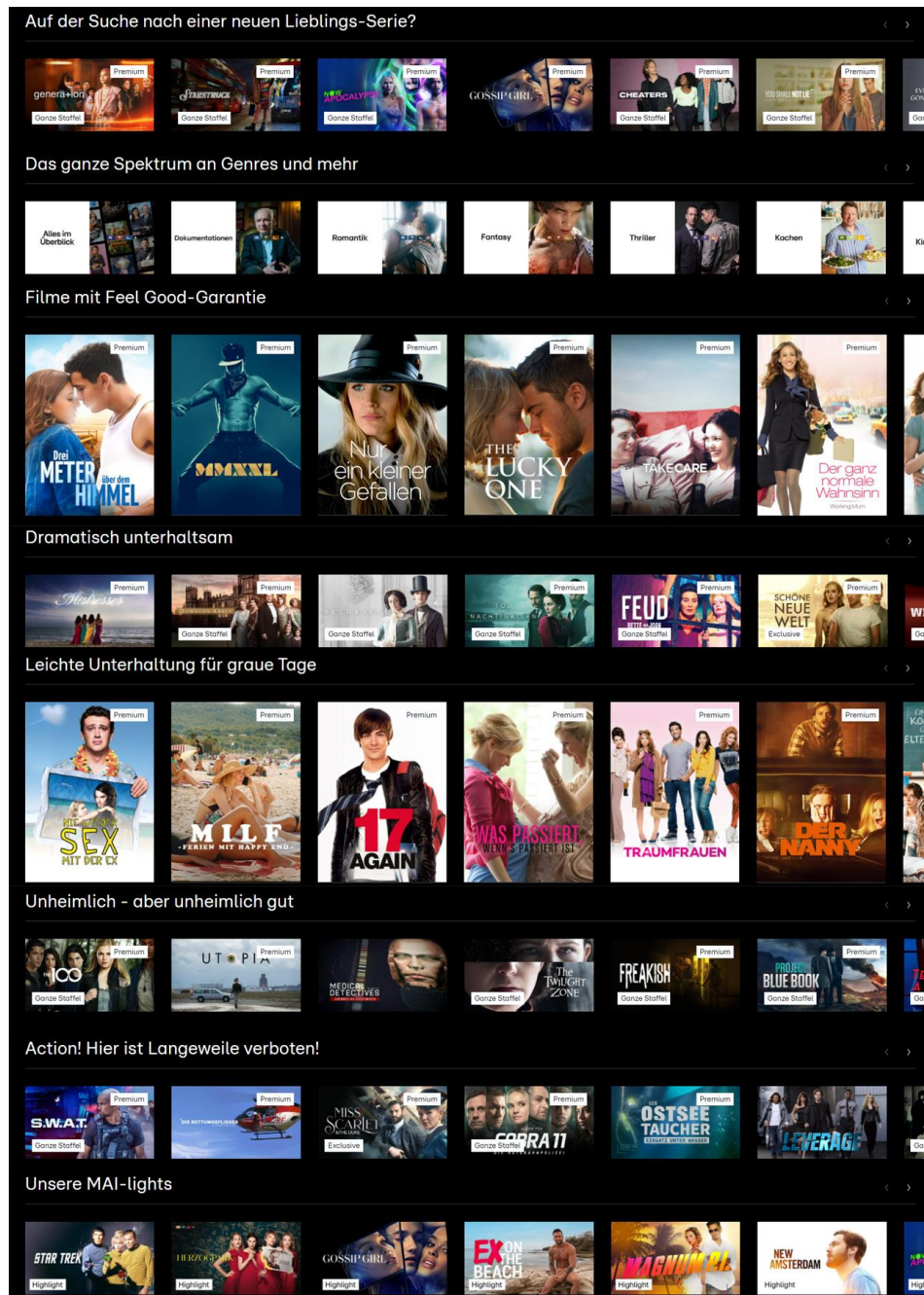
1. Watch in One Weekend / Während eines Wochenendes ansehen / Se alt på en helg;
2. 30-Minute Laughs / Herzhaft lachen - in max. 30 Minuten / 30 minutter lange latterbrøl;
3. Mood Boosters / Gute Laune im Handumdrehen / Humørsprederer;
4. Gems for You / Geheimtipps für Sie / Perler utvalgt til deg.

Appendix 2. Examples of the content categories on NRK.



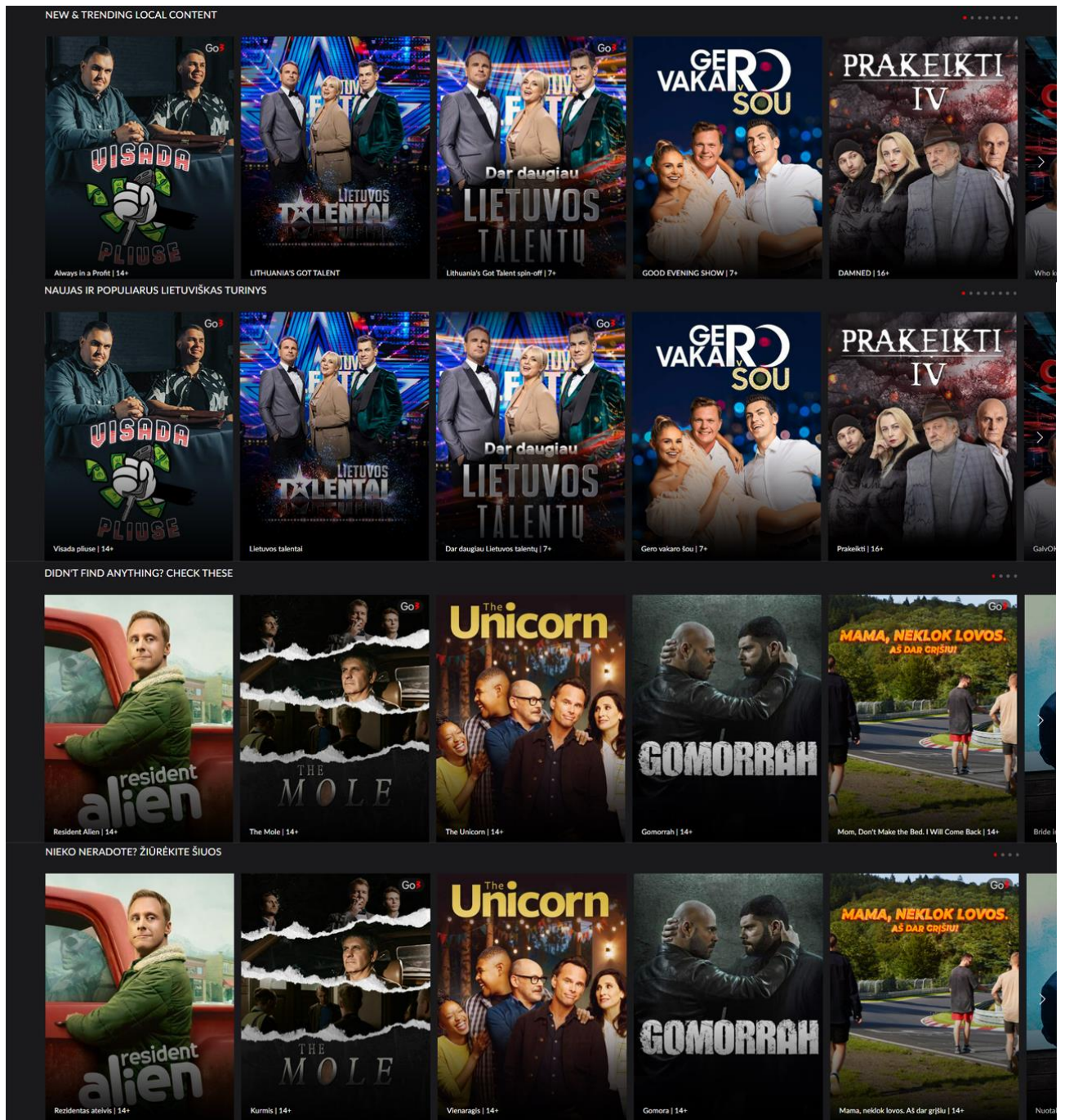
1. Din neste serie? – Your next series?
2. Kos deg med disse – Enjoy yourself with there;
3. Dokuland - historier fra verden – Doculand - stories from the world;
4. Serier du kan slappe av med – Series you can relax with;
5. For deg som elsker musikk – For you that enjoys music;
6. Serier du kan fråttse i – Series you can indulge in;
7. Gøy – Fun!

Appendix 3. Examples of the content categories on RTL+.



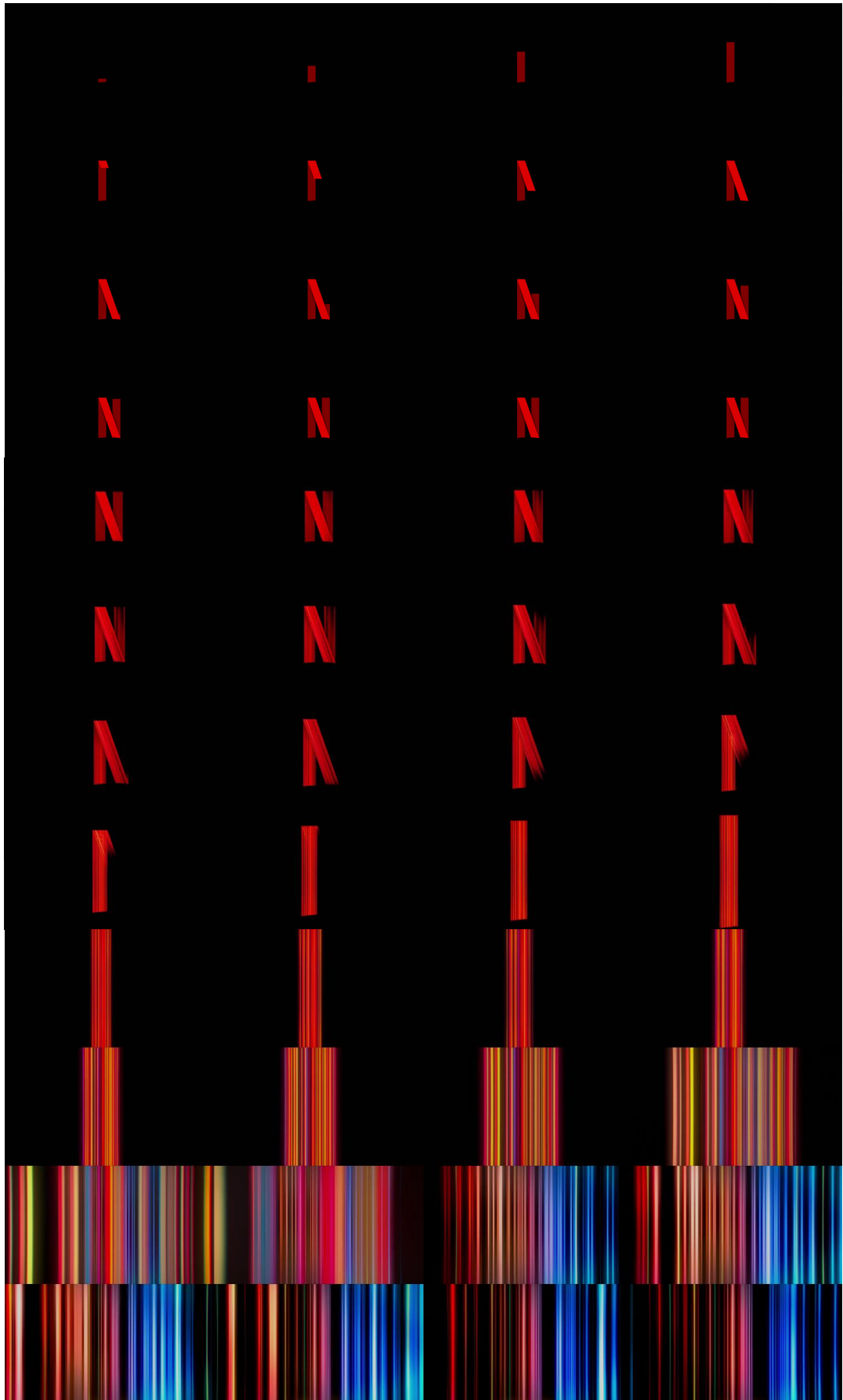
1. Auf der Suche nach einer neuen Lieblings-Serie? – Looking for your new favourite series?
2. Das ganze Spektrum an Genres und mehr – The whole spectrum of genres and more;
3. Filme mit Feel Good-Garantie – Guaranteed feel-good movies;
4. Dramatisch unterhaltsam – Dramatically entertaining;
5. Leichte Unterhaltung für graue Tage – light entertaining for gloomy days;
6. Unheimlich - aber unheimlich gut – Scary - but scary good;
7. Action! Hier ist Langeweile verboten! – Action! Boredom is forbidden here!
8. Unsere MAI-lights – Our May-lights (note: wordplay on highlights).

Appendix 4. Examples of the content categories on Go3.

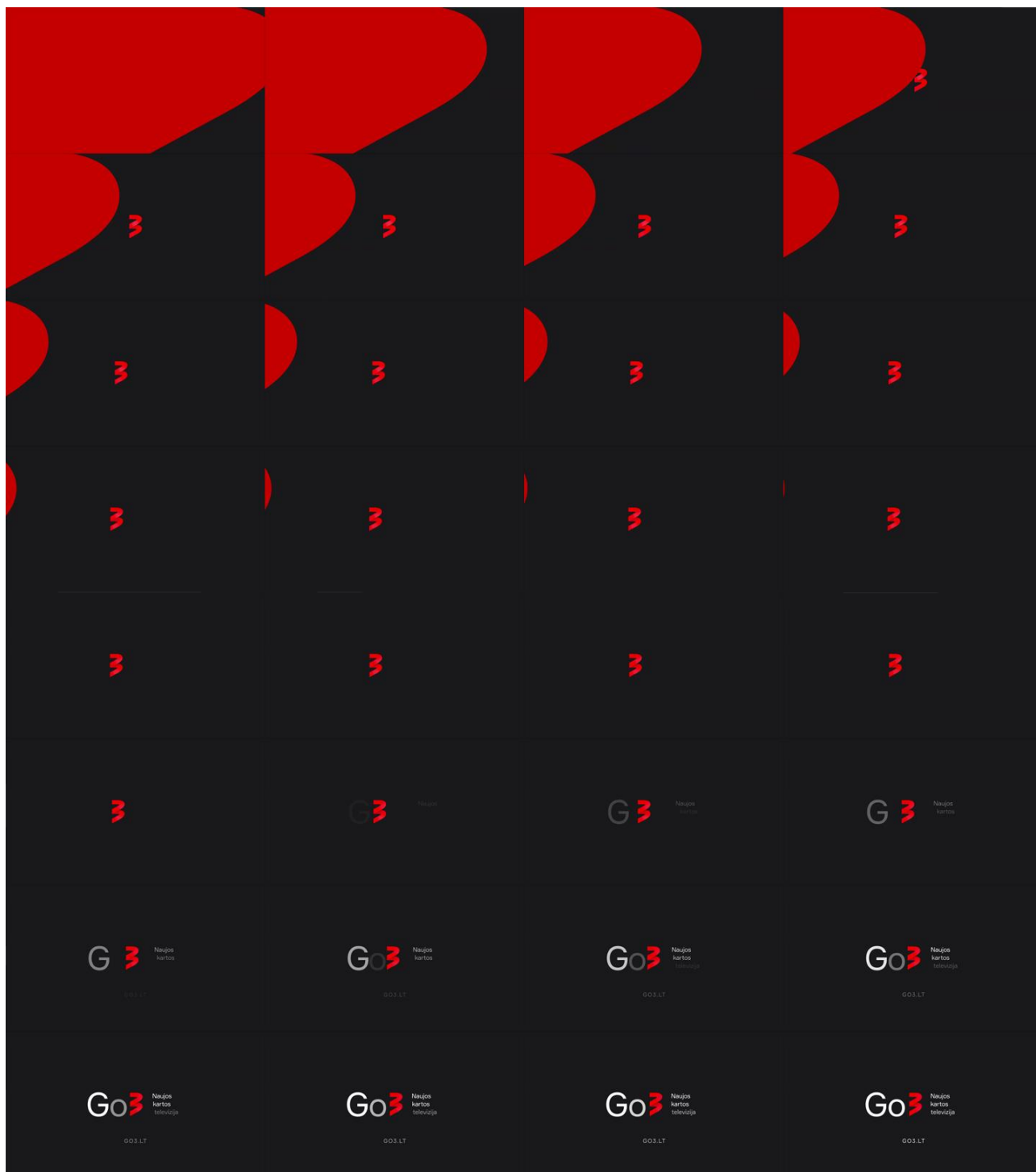


The same categories are presented in both English and Lithuanian.

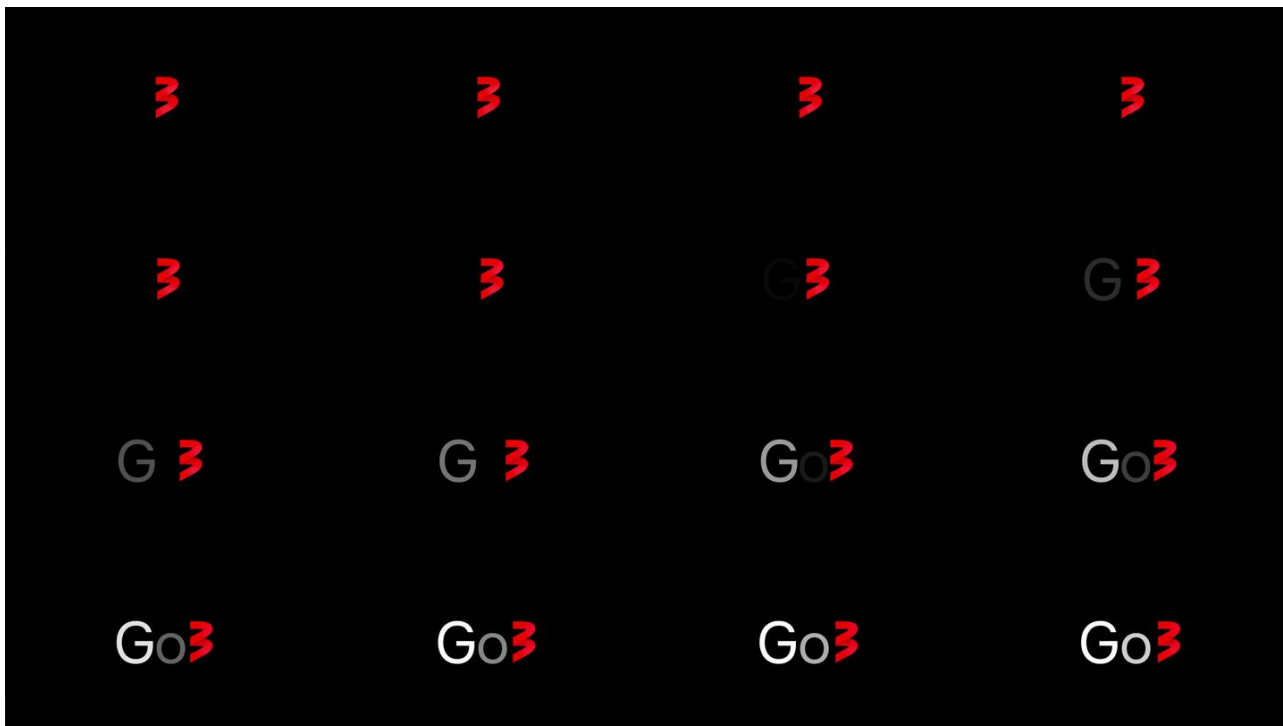
Appendix 5. Screenscaps of the Netflix logo animation (Netflix, 2019).



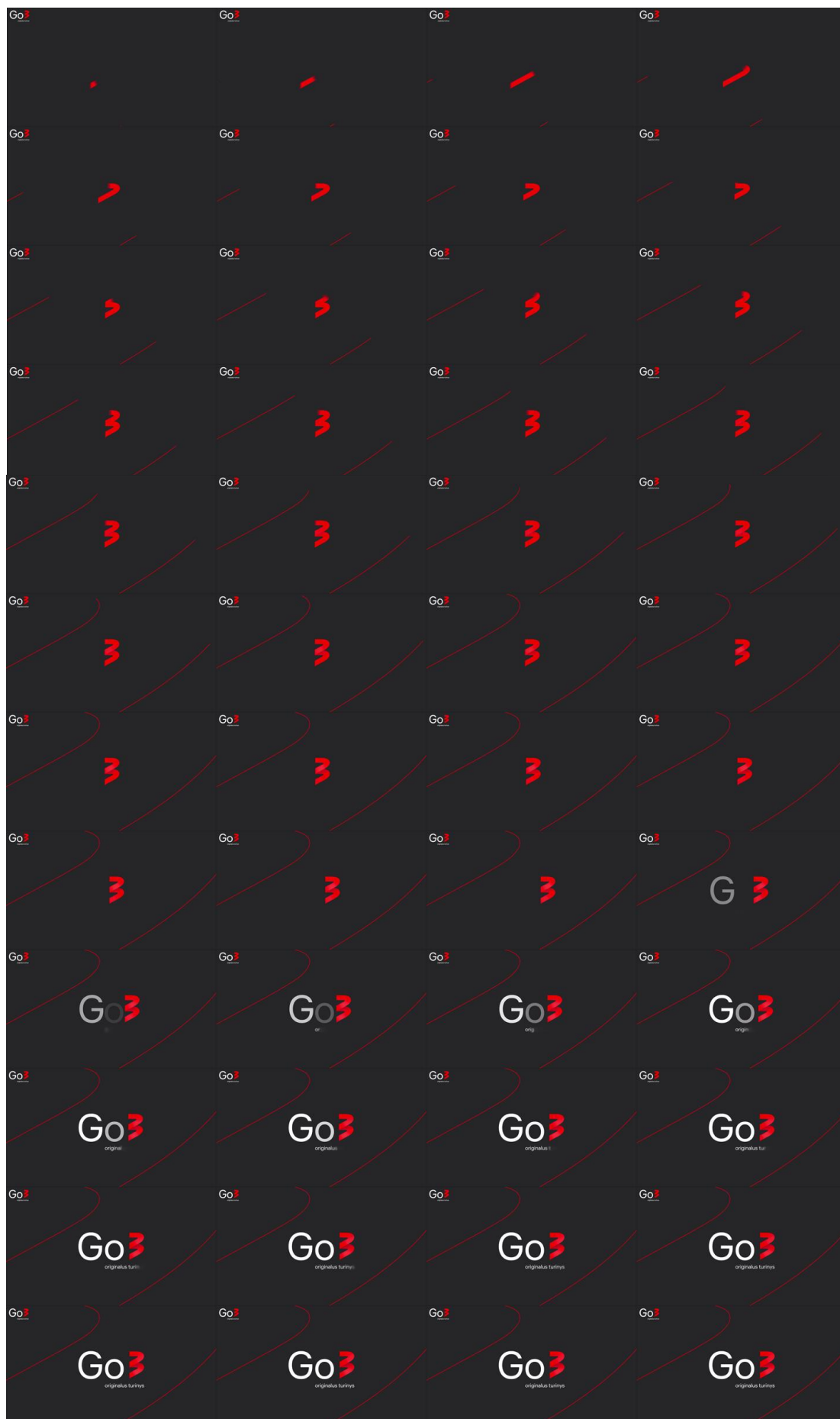
Appendix 6. Screenscaps of the Go3 logo animation - version 1 (Go3 Lietuva, 2021).



Appendix 7. Screenscaps of the Go3 logo animation - version 2 (Go3 Lietuva, 2021).



Appendix 8. Screenscrops of the Go3 Originals logo animation (Go3 Lietuva, 2022).



Appendix 9. Screenscaps of the TV3 Play logo animation (TV3 Lietuva, 2020).

