

“It’s All Greek to Me”:

A qualitative approach to Netflix’s Brand in Greece

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ABSTRACT

This research provides a brief overview of Netflix’s presence in the Greek market. Analyzing posts from Netflix Greece Instagram account and Greek media articles, this thesis attempts to gain valuable insights regarding Netflix’s branding strategy on the Greek market, together with media executives’ impressions. Systematically sharing posts on the Greek Instagram account, Netflix has created a solid presence on the social media platform. The main usage of Instagram, by Netflix, is to inform the audience and promote its content and services, while maintaining a uniform brand identity. Accordingly, the articles released on Greek press include various elements of Netflix’s marketing strategies, while, simultaneously, they provide promotional and informational content for Netflix. Media experts acknowledge Netflix’s impact on the Greek market and the audience; however, they do not see the streaming platform as a direct competitor to the local pay-tv providers, at least not until Netflix invests in Greek original productions. Market executives’ reactions confirm the importance of Netflix arrival in local markets, as new digital media is shaping the relations within the pay-tv industries globally. This thesis contributes to the existing literature on branding strategies used by Netflix when entering diverse markets. Moreover, the study provides insightful information on Netflix’s presence in small national markets, while investigating the use of Instagram for branding purposes.

KEYWORDS: *Netflix, branding strategies, Greece, content analysis, Hellenization*

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Table of Contents

Abstract and keywords

[Preface]

1. Introduction	7
<i>1.1. Research Question</i>	9
<i>1.2. Scientific Relevance</i>	9
<i>1.3. Social Relevance</i>	10
<i>1.4. Chapter Outline</i>	11
2. Theory – Previous Research	13
<i>2.1. Global branding</i>	13
<i>2.2. Global Brand Netflix</i>	14
2.2.1. <i>Localization</i>	14
2.2.2. <i>Netflix Originals</i>	16
2.2.3. <i>Binge-watching</i>	17
2.2.4. <i>Our brand is personalization</i>	19
2.2.5. <i>Social media branding strategy</i>	21
<i>2.3. Greek Market</i>	23
2.3.1. <i>Local market characteristics</i>	23
2.3.2. <i>Media and pay-tv landscape</i>	23
2.3.3. <i>Netflix in Greece</i>	26
2.3.4. <i>Netflix on Greek social media</i>	28
3. Methodology	30
<i>3.1. Qualitative content analysis</i>	30
<i>3.2. Data collection and data analysis</i>	31
3.2.1. <i>Sampling</i>	32
3.2.2. <i>Instagram posts</i>	32
3.2.2. <i>Media articles</i>	33
<i>3.3. Operationalization</i>	33
<i>3.4. Validity, reliability, and credibility in qualitative research</i>	36
4. Results	37
<i>4.1. The branding strategy on Instagram</i>	38
4.1.1. <i>Brand Identity</i>	38
4.1.2. <i>Localization as a branding strategy on Instagram</i>	40

4.1.3. <i>Netflix Originals at the front row</i>	43
4.1.4. <i>Netflix and binge-watching on Instagram</i>	44
4.1.5. <i>Branding Netflix with emotions</i>	45
Summary	47
4.2. Analysis of the media articles	48
4.2.1. <i>Localization</i>	48
4.2.2. <i>Greek market characteristics</i>	53
4.2.3. <i>Competition for Netflix</i>	57
4.2.4. <i>Netflix's action plan</i>	59
4.2.5. <i>Netflix Originals</i>	60
4.2.6. <i>Binge-watching</i>	61
4.2.7. <i>Technology and operations</i>	63
Summary	63
5. Discussion and Conclusion	65
5.1. <i>Answer to the research question</i>	65
5.2. <i>Scientific and social implications</i>	68
5.3. <i>Limitations and suggestions for further research</i>	69
Literature and References	71
Appendix A.....	78
Appendix B.....	81
Appendix C.....	85

Table of figures

Figure 1. Top Instagram posts by type (n).....	38
Figure 2. Netflix’s logo and symbol.....	39
Figure 3. Examples of posts carrying hashtags with the brand, and brand logo.....	40
Figure 4. Examples of localized content.....	41
Figure 5. Memes with references to Greek reality.....	42
Figure 6. Announcement of season finale with references to the Greek Pride slogan “ΤΙΑΠΟΥΣΑ” (Present).....	42
Figure 7. Use of “It’s all Greek to me” hashtag.....	43
Figure 8. Instagram posts with binge-watching hashtags.....	45
Figure 9. Instagram posts with elements of <i>Nostalgia</i>	46
Figure 10. Humorous memes referencing Netflix Originals.....	47
Figure 11. Wind Vision’s TV spot in Greek television.....	52
Figure 12. Stranger Things trailer from the Netflix US and Netflix Greek Instagram accounts.....	66

1. Introduction

Netflix, which started as a DVD rental company in 1997, was founded by Reed Hastings and Marc Randolph in California. Aspiring to expand, in 2007, Netflix introduced streaming media and started planning its international development, while in 2012 entered the field of content production. In 2012, Netflix was planning to invest \$70 to \$100 million on original programming to attract new subscribers (Ferrell & Hartline, 2014). Between 2012 and 2015, company's subscribers, in both US and the rest of the world, were rapidly increased, with Netflix leading the streaming industry, having more subscribers than HBO's and Hulu Plus' combined (Karadimitriou, 2016). In September 2015, the company expanded in the markets of Japan, Spain, Portugal and Italy, and, at the same, established itself in the markets of Australia and New Zealand, despite the fact that the competition was strong (Karadimitriou, 2016). In the last four months of 2015, Netflix gained 5.59 million subscribers (of which only 1.56 million were from the US market), reaching a total of 74.76 million subscribers from around the world (Karadimitriou, 2016).

On January 2016, during the Consumer Electronics Show, CES 2016, that takes place every January in Las Vegas, Reed Hastings, Netflix Chief Executive, announced Netflix's global expansion with the addition of 130 new countries to its services (Villarreal, 2016). This expansion marked a significant increase in the size of Netflix's global network, which formerly included 60 countries in North America, Latin America, Europe, and in the Pacific (Villarreal, 2016).

“When we started Netflix nearly 20 years ago, we dreamed of the day when the Internet would enable us to deliver TV shows and movies to the billions of people with whom we share the planet. Today, right now, you are witnessing the birth of a global TV network,” said Reed Hastings to the crowd as part of his speech (Villarreal, 2016, par. 4).

This announcement turned out to be a turning point for the brand (Lobato, 2019). At the time, while investors anticipated Netflix to extent its network, the size of the expansion left the ones in Wall Street, who were worried about company's downturn in the domestic market, surprised (Villarreal, 2016). However, Netflix is still not available in China, North Korea, Crimea, and Syria due to U.S. government restrictions.

Netflix's global expansion played a crucial role in the company's success. By 2017, Netflix was available in over 190 countries, while more than half of its 130 million subscribers were outside U.S. market (Brennan, 2018). For the first time, in the second quarter of 2018, Netflix's overseas streaming sales overpassed the domestic ones, which was

a remarkable achievement for a company, that until 2010 was available only in the U.S. market (Brennan, 2018). In 2020, with over 167 million paid subscriptions in more than 190 countries, Netflix is one of the most well-known subscription video on-demand platforms (SVOD) in the world (Netflix Investor Relations, 2019).

Over the past ten years, online streaming services like Netflix and Amazon Prime gain more and more popularity, especially among young people who turn down traditional broadcasting and pay-TV, inducing a crisis in traditional media such as the BBC (Sweney, 2018a; Sweney 2018b). Additionally, through their worldwide expansion and accessibility, SVOD platforms create new opportunities for the global television industry and its audiences (Wayne, 2019). However, since its beginning Netflix faced a lot of challenges and obstacles within the framework of global television industry in order to become the renowned successful business. The world, and consequently the markets have been more global and more connected than ever, and this new reality has brought to Netflix challenges of cultures, values, and perspectives (Pallister, 2019). The challenge of globalization was the biggest for the company.

From the beginning, Netflix is trying to make its services available to everyone, everywhere. Today, subscribers have the opportunity to download their favorite shows on their devices and watch them at any point during the day, for instance while traveling or commuting, in the subway or when sitting in a cafe. This uninterrupted experience is truly appealing to Netflix's users, the number of whom is constantly increasing. Nevertheless, access to the service depends on multiple factors; from the reach and the capacity of a country's broadband infrastructure to the pricing structures that regulate both internet access and SVOD services in each region (Lobato, 2019).

Moreover, Netflix's dominance on the television industry is more than their impressive library and the effortlessly easy technologies (Weinroth, 2015). Behind the media brand giant's success, there are innovative marketing strategies and worth-imitating branding tactics.

This thesis aims to research the way Netflix is establishing its brand in Greece and how its marketing strategies are implemented in the Greek market. In such a small national market where the audience has been traditionally engaging with Greek TV content, the booming numbers of Netflix's members is a case worth exploring. Furthermore, this study aims to provide a better understanding of whether Netflix's growing popularity among the Greeks, is a result of the company's applied marketing strategies and branding practices and whether it affects the market, as well.

1.1. Research Question

Despite the fact that Netflix is an American company, its main goal is to enhance the global interest in its services and content by effectively promoting its brand. To target a culturally diverse audience Netflix invests in its original productions, localized content and the provision of a personalized experience to the viewers with the contribution of the latest technological innovations. This study aims to examine the case of Netflix in Greece; in a small market, where any prior OTT service was absent, rendering Netflix's entrance in 2016 as a noteworthy fact (Papadimitriou, 2017).

Previous literature indicates that Netflix uses a specific marketing model in order to establish its brand worldwide. Nevertheless, there are issues, that remained unaddressed, regarding how global brands are established in local markets and whether they differ from national brands, especially in small markets like Greece. Therefore, this thesis is guided by the following research question:

How global Brand Netflix is branding its services for the Greek market?

Conducting qualitative content analysis on articles from Greek media and posts from Netflix's Greek account on Instagram, this study aims to answer the research question posed. Simultaneously, the thesis will focus on how Netflix has established and maintains its brand in Greece and how marketing strategies applied by Netflix are implemented on the local market. By examining Netflix's marketing and branding strategies applied in Greece and comparing them to those employed by Netflix globally, the goal of this research is to understand the marketing models used by Netflix and their impact on the Greek market.

1.2. Social Relevance

With 167 million subscriptions globally, Netflix is the leading provider of streaming media. Netflix continues to grow rapidly on a global scale, despite the fact that its market share of global video subscriptions has fallen over the last decade (Clark, 2020). Since its start, Netflix is constantly gaining ground in Greece. Namely, Netflix is using a multitude of its powerful branding strategies to approach the Greek audience. Moreover, Netflix has partnerships with national providers, that promote Netflix's content as part of their provided services. Finally, a significant element of Netflix's presence in Greece is the engaged community, that the brand has manage to build, with their social media accounts; for example, @netflixgr Instagram account has 125,000¹ followers, while @NetflixGR Twitter

¹ Information retrieved on May 23, 2020 from <https://www.instagram.com/netflixgr/?hl=el>

account has 15,300 followers². However, the questions that arises is whether its social media branding strategies are enough to persuade the audience purchase the service.

Therefore, the selected research topic aims to shed light on the remarkable presence of the media giant brand in the Greek market through the applied social media marketing strategy on Instagram. Furthermore, this study aims to offer insights into the Greek market's perspective, regarding the practices Netflix has used to establish its brand and promote its content in the market.

1.3. Scientific Relevance

Netflix's transition to television production spurred media scholars' interest, particularly when Netflix made a crucial move to original content, including titles such as *House of Cards* (2013 – 2018) and *Orange Is the New Black* (2013 – 2018) (Burroughs, 2018). Online television portals, like Netflix, feature alternative forms of programming, marketing, curation, and audience analytics, representing the emergence of a new era for the media industry, where the attention of the marketers is focused on the interactive audience rather than the development of original intellectual property (Cunningham & Craig, 2016). Netflix deploys a great range of marketing strategies and techniques in the diverse markets, that the platform is available, mainly seeking to expand the network of its subscribers.

In the new era of convergence and digitization of media, the way people watch television has radically changed. Living in the age of Internet-distributed television, the consumption of the television content has been simplified; viewers have the opportunity to watch television wherever they are, by using their devices. Netflix, providing this flexibility, has managed to construct a new reality in the television industry where subscribers can have their own personal channel. The question posed, is whether the Greek market is ready to adapt to this new era of internet-distributed television and its challenges or it will be left behind once again.

Regarding the case of Greek market, Netflix's main competitors are the local subscription platforms, that are long-established in the market and have a more Greek-oriented character. Subscription services in Greece follow a different approach, regarding the marketing strategies used, investing in more traditional practices, like advertisements, where Netflix has chosen not to. The study's scientific relevance lies in identifying whether

² Information retrieved on May 23, 2020 from <https://twitter.com/NetflixGR>

Netflix's marketing strategies and branding practices differ from the local providers' approach, and, also, whether they differ from Netflix's global branding approach. Furthermore, there is a lack of academic research regarding the analysis of Netflix's tactics and strategies applied in the Greek market.

1.4. Chapter Outline

Chapter 1: Introduction

In this first part of the thesis the background of the study and the research problem are introduced. At first, useful information regarding Netflix and its worldwide presence is provided in order to build the framework of this research. Moreover, taking into consideration the literature on Netflix's branding strategies on local markets, the research question that drives this thesis is presented. The social and scientific relevance of the study are addressed, as the aim of this study is to be relevant, contemporary and to shed light into unaddressed issues.

Chapter 2: Theory – Previous Research

In this chapter the main concepts of this study and the previous research on this particular field are going to be presented. These concepts are directly related to the research question of this thesis and they provide an initial structure for the future analysis. The theoretical framework for the global brand Netflix will be analyzed and the branding model used by Netflix will be presented. Continuing, important information regarding the characteristics of the Greek market will be provided, together with a historic analysis of the evolution of television in Greece. Finally, the presence of Netflix in Greece, as well as the notable elements related to it, will be described and analyzed.

Chapter 3: Methodology

In this section, the choice of qualitative content analysis, in order to answer the research question, is discussed and justified. The purpose of this research is to examine Instagram as a branding tool for Netflix through the analysis of Instagram post in their Greek account. Moreover, this research is supplemented with the analysis of articles in the Greek media in order to understand the impact of Netflix's branding and marketing strategies in the Greek market. In this chapter, concrete information about the gathering of the secondary data will be provided. Moreover, the process of data analysis will be explained in detail together with the units of analysis. Finally, the important issues of validity, reliability and credibility of the

study are addressed.

Chapter 4: Results and Discussion

In this chapter, the results of the research are presented. Based on the final coding frame, the data are presented including references and examples from the dataset (e.g. posts screenshots, quotations). The findings are not be simply described, but critically unpacked.

Chapter 5: Conclusion

The purpose of this last chapter of this Thesis, is not only to provide an answer to the research question, but also, offer a better understanding of the results of this study. Moreover, limitations and ideas for future research on this topic are provided.

2. Theory - Previous Research

2.1. Global branding

Markets are fiercely integrating across borders giving the opportunity to global brands to become popular and attract consumers internationally (Winit et al., 2014). Building a diverse, successful, and sustainable global brand is a challenge for both small and big firms. Global brands cannot enter a new market, assuming that opportunities for expansion will effortlessly show up. They need to gain a foothold which means that they must be prepared, in advance, developed and maintained. Companies are trying to elicit positive emotions and perceptions to customers, in a way that creates a brand identity that can be maintained across global boundaries (Okazaki & Taylor, 2013).

Due to the expansion of the international television trade and the growth of transnational media corporations, television has been going through a process of transnationalization (Chalaby, 2002). In recent years, the global television industry has been in the center of academia due to the shifts that the transnational television has been through with the emergence of online streaming platforms and subscription video-on-demand services (Wayne, 2019). When it comes to local markets, such SVODs have a great influence on the national television industries, while we know very little about how executives and audiences respond to these changes and how the local markets react to the marketing strategies applied by global companies, like Netflix.

Netflix's worldwide expansion and appeal to international audiences constitute remarkable achievements in terms of brand management and marketing. Alden et al. (1999) note, in regard to the "global consumer culture positioning" strategy (GCCP), brands with a global image have a powerful presence, which derives from consumers' attributions and leads to continuously increasing sales. Global firms more frequently use GCCP strategies than "local consumer culture positioning" (LCCP) strategies when entering emerging markets, where consumers aim to enhance self-perceptions of status and esteem by buying brands that are perceived as cosmopolitan and modern, or foreign and exotic (Gao, Tate, Zhang & Liang, 2018, pp. 49-50). Consequently, consumers are more likely to invest money in globally positioned brands, as they consider them to be more trustworthy and credible, as well as they believe that such a purchase contributes to the reinforcement of their personal image (Alden et al., 1999; Winit et al., 2014).

Netflix acknowledges the need to adjust its branding strategy in order to operate successfully in culturally diverse environments (Chalaby, 2002). In the local markets, companies need to adapt their marketing strategies according to the behaviours, culture and,

in general, the local environment. According to Gao et al. (2018), this is a challenging task for the global brands, especially, when it comes to branding on social media. It is the nature of the social media platforms that makes it more difficult for brands to adapt their efforts in a local market (e.g. use of hashtags and image tagging)

This section discusses the main concepts of this study and outlines the previous research on the field that is related to the research question. Specifically, at first, the focus is on the branding strategies Netflix uses to establish its brand globally. Then, a brief introduction of the market characteristics follows, including an unpacking of the media landscape and historical analysis of the evolution of television in Greece based on the existing literature. Moreover, the thesis tackles the specific case study of Netflix's establishment in the Greek market examining the details and elements of this process. Finally, great attention is given to the theory of social media branding strategies.

2.2. Global Brand Netflix

2.2.1. Localization

The evolution of transnational television is an intricate process that affects global and local markets. Lobato (2019) compares brand Netflix to MTV, when the former was launched back in the 1980s. Executives' goal for MTV was "to build an international advertising market and youth culture around American pop music, with the music video at its center" (Lobato, 2019, p. 107). MTV's worldwide spread was based on the American model, with the vast majority of the videos reflecting American trends in music. This approach turned out to be a failure, as localization is a matter of great importance for television markets, and marketers had to adapt MTV's content to the national music style of each area (Lobato, 2019). Similar to MTV, Netflix's goal is to create an international advertising market with the television entertainment at its center.

According to Chalaby (2002), "localization in the television industry consists of adapting an international channel to a local audience with the aim of making it more palatable to that public" (p.192). The efforts of localization from the media companies "are ranging from superficial repurposing of existing content to a deeper, and more expensive, localization" (Lobato, 2019, p. 110). Localization includes less complicated options as subtitling and dubbing and more complex ones as local programming and local productions. Regarding subtitling and dubbing, audiences enjoy the privilege of watching TV in their language. For each Netflix's original production, a team of executive translators is required; either from the in-house translators of Netflix or from professionals the company

collaborates with in the United States and Europe, in order to fulfil the difficult task of providing internationally localized content and services (Lobato, 2019). This ever-increasing effort for localized content can be depicted by the Hermes project, launched in 2017, to accelerate and facilitate the process of translation and offer internationally localized programming (Jenner, 2018).

The most complicated and expensive form of localization is the production of local programming (Chalaby, 2002). As far as local productions are concerned, viewers' desire for locally produced content cannot be easily bended, therefore, it is imperative for media companies to take the local market's demands into consideration. Media market executives recognize that global audiences have distinct interests, desires, and aspirations (Lobato, 2019). Thus, executives should work together with the contribution of local experts, who know each culture's media landscape, in order for tailored localized branding strategies and programming to be developed. Nevertheless, Netflix has explained that local productions represent only a small part of the programming in the foreign markets (Lobato, 2019).

Local opt-out is the greatest form of localization (Chalaby, 2002). Opt-out does not only involve local programming, within the framework of an international feed, but the introduction of a new local channel with a completely regionalized service (Chalaby, 2002). At this level, partnership with local companies and local employees is made to facilitate the process of the localization. This way, international content is adapted to the local market and exclusive regional programmes are produced (Chalaby, 2002). Opt-outs often require investments on specific marketing strategies since they are rebranded as local channels (Chalaby, 2002).

For transnational television to effectively enter and be competitive in diverse international markets, local offices, sales and customer service teams, local agents to advise on strategy, and partnerships with producers, brands, advertisers, and telcos are required (Lobato, 2019). However, in the case of Netflix there are certain peculiarities in the brand's expansion in international markets. In Canada, the largest foreign market, and now one of the most significant target markets, Netflix had never established a local office until after 2017, when it started its productions there (Lobato, 2019).

Overall, local markets are characterized by diverse tastes, income levels, languages, genre preferences, willingness to pay, and other cultural traits, so the challenge for global brand Netflix is to adapt its branding strategies to these conditions (Lobato, 2019). Success, as already mentioned, is not about creating attractive content for the world to see, but also about recognizing and effectively managing cultural differences. Even though, Netflix, at

first, struggled dealing with cultural diversity while developing its branding strategies for transnational markets, it has now managed to develop strategies concerning the process of its internationalization (Lobato, 2019).

2.2.2. *Netflix Originals*

In 2020, Netflix needs no introduction; it has managed to connect its brand with the temporary pop culture. When Kim Kardashian casually tweeted on her personal account about Netflix Original movie, *BirdBox* (2018), she offered free promotion to the brand just because she knew that such a move would contribute to her image, as well (Beer, 2019). Wayne (2018) states that Netflix has established its brand identity through Netflix Originals. Netflix is both disrupting and reaffirming conventional media industry logics and practices through the incorporation of its own original streaming content (Burroughs, 2018). Netflix's first original production *House of Cards* (2013 – 2018) is based on the award-winning miniseries of BBC – *House of Cards* (Burroughs, 2018).

In its early years of original programming (2013), Netflix strongly counted on its flagship content as *House of Cards* (2013 – 2018), *Orange Is the New Black* (2013 – 2018), *Hemlock Grove* (2013 – 2015), even though some would turn out to be more streamed than others (Jenner, 2018). Remarkably, Netflix spent more than \$100 million to pre-order two seasons of the series and paid up front for 26 *House of Cards* episodes, for approximately \$5 million each, before anything any scene was shot (Burroughs, 2018). Sarandos' first expectations were, for Netflix, to produce at least five original programs each year, with the budget, in 2013, being \$300 million only for original programming and its promotion (Bishop, 2013). As Sarandos stated in a discussion with The Hollywood Reporter, "At some point I said, 'Look, this is a massive bet. And if it doesn't work, it will be a super-expensive license, but we won't be in the originals business. And if it works, we'll be in the originals business'." (LaPorte, 2017).

From the beginning Netflix hired big Hollywood names and invest excessive amounts of money, which seemed to pay off for the brand, as during the first nine months of 2013, when Netflix started four new shows, the subscription numbers raised up to 15% (LaPorte, 2017). Netflix was trying to recreate the HBO model of introducing quality television but through a digital streaming distribution model; this strategy has managed to increase HBO's subscriptions as a pay-TV channel (Burroughs, 2018; Jenner, 2018). As Ted Sarandos argued: "The goal is to become HBO faster than HBO can become us" (Nail, 2019). As Jenner (2018) points out, "by positioning itself as competitor to HBO, Netflix

implicitly defined itself as television, rather than an online broadcaster like YouTube” (p. 5).

According to Hastings’ Q4 2018 earnings interview, stated that the majority of brand’s engagement comes from the Netflix originals shows (Nail, 2019). He, also, compared the 80 million users recorded watching the 2018’s hit movie, *Bird Box* (2018), to the kind of culture-moving moments that major tv shows produced in the past (Nail, 2019). Finally, he mentioned that the majority of Netflix’s marketing expenses are not in the subscriptions acquisition but in the promotion of the main Netflix original shows (Nail, 2019).

Netflix’s promotion of its original series, shows and movies has been in the centre of attention for both consumers and executives (Beer, 2019). At first, for Netflix the most effective way to globally promote their content turned out to be its services themselves; “its (Netflix’s) menus, in-app notifications, and even old-fashioned email to alert people to programs” (Beer, 2019, par. 5). After subscribers’, stars’ and producers’ complaints about this obsolete strategy, Netflix changed its practices on 2018, spending 2 billion dollars on marketing, where approximately 85% of that amount spent on Netflix Originals (Beer, 2019). Netflix had announced that by the end of 2018, the company would have more than 1,000 original productions (McWhorter, 2018). The company, even, tends to obscure the lines between its original programming and other content on the platform, thereby presenting them as the main point of recognition for its audience (Wayne, 2018). Additionally, most of what Netflix introduces as original content is more accurately defined as exclusive in a specific market and are available only through company’s platform (Wayne, 2018).

According to Elberse (2016), people spend great amounts of time and money in consuming TV content, as a result, these kind of investments from companies like Netflix turn out to have a major influence in the popular culture.

2.2.3. *Binge-watching*

When Netflix began launching its own original shows in 2013, it emphasized two interrelated points in its marketing campaigns: binge-watching and “quality” TV. Netflix has established its brand in the market with a great range of media alternatives introducing a new option of the “legitimation of binge-watching through ‘quality’ TV” (Jenner, 2018, p. 139). Binge-watching is the idea that more clearly alludes back to Netflix's history as a DVD rental mail-order company. This practice of watching television, “binge-watching”, is defined by Netflix as watching from two to six episodes of the same show in one sitting (Davis, 2016).

Binge-watching did not start with Netflix; particularly HBO, encouraged its audiences to watch again the show *The Wire* (2002 – 2008) on DVD in order to understand how the different seasons and plots were connected to each other (Jenner, 2018). Moreover, binge-watching, as a practice, mainly originated from the viewers themselves. Researchers have outlined that fans' hobby of collecting "cult" TV series of VHS recordings suggests an early form of binge-watching (Jenner, 2018). Another practice that refers to the concept of binge-watching is the audio recording of BBC's *Doctor Who* (1963–89) episodes by viewers in the 1960s, so they could repeatedly watch the series at their convenience (Jenner, 2018).

However, Netflix managed to make binge-watching popular with viewers internationally, through its services. In 2013, the marketing campaigns for the early in-house productions for the *House of Cards* (2013 – 2018) and the season 4 of *Arrested Development* (2013 -) introduced and explained the term binge-watching (Jenner, 2018). For Netflix, binge-watching has become an identifying concept (Jenner, 2018). Firstly, the interface of the platform is structured in a way that makes viewers follow a specific pattern while watching their favorite series and shows. The front page regularly reminds users about the shows that have left incomplete. Secondly, when an episode finishes, the next one will follow in a few seconds by default, unless the viewers choose to stop it themselves or close the platform. Furthermore, Netflix releases the whole season of a series at once, thereby inviting viewers to binge them all. In this way, Netflix keeps the viewers engaged with their favorite content and consequently with the platform. According to a research on "Uses and gratifications of binge-watching through Netflix" by Pittman and Sheehan (2015), binge-watching turns out to be a more interesting, entertaining, and engaging way to watch television. Moreover, the research results have shown that viewers prefer to binge-watch series on Netflix as, unlike Hulu Plus, there are no commercials on the platform.

The *House of Cards*' protagonist, Kevin Spacey, had a significant role in the promotion of binge-watching practices. In 2013, during the marketing campaign of *House of Cards*' first season, Spacey, that was invited in a variety of talk shows to promote the series as well as Netflix itself, highlighting the power of control given to viewers through binge-watching (Jenner, 2018). Viewers may participate in different types of binge-watching, but often use the same words to discuss about them. Another advantage of the brand, mentioned by Spacey, is that by giving to users the ability to watch its content at their own pace, piracy is prevented. By this he meant that viewers will not have to look for alternatives, that might be more cost-efficient, yet illegal methods, in order to watch their favorable content without time or location constraints.

Regarding the idea of “binge-watching and quality tv”, marketing of Netflix emphasizes on the notion of “quality television”. Netflix’s goal was not to consistently create unique content, but content of the highest quality possible (Weinroth, 2015). According to Jenner (2018), the idea of ‘quality’ television was also reintroduced to attract viewers (p. 55). Quality content is not a buzzword for marketers; it is an approach that must be embraced, in order to both distinguish brands in an increasingly cluttered market and to develop credibility and reputation among the audience (Weinroth, 2015).

Overall, what Netflix managed to achieve was to conceptualize binge-watching as a term more directly related to television entertainment and its own brand (Jenner, 2018). What becomes apparent is that Netflix has changed the way television is produced, distributed and consumed. Marketers and television executives pay great attention to Netflix’s binge-watching strategies, as earlier researches have demonstrated that the latter attracts more viewers to a programme (Pittman & Sheehan, 2015).

2.2.4. “*Our Brand is Personalization*” – Ted Sarandos

Another essential element of Netflix’s marketing strategy is the personalized content that offers to its subscribers. According to Lobato (2019), “Netflix’s fundamental Vision of entertainment is a personalized experience built around the individual consumer/family unit, equipped with their own credit card and data profiles, to be enjoyed in private spaces” (p. 104). The idea of personalization is not something new in the television industry. Since the early 1980s with the evolution of digital television, a new model of personalized programming emerged (Osur, 2016). This new development in cable television offered a great range of options for channels, supported by VCR technology and a specification in Nielsen measuring technologies (Osur, 2016).

One of the most important aspects of Netflix’s evolution was to create a completely personalized experience for its viewers, so that they could not only have the control of what they watch but, also, where, how and what content and information they will be exposed to. Netflix has specialized on personalized analytics, as the core value of the business has always been to predict what customers would like to watch. In this way, data analytics is the fuel that fires the recommendation machines developed to serve the aforementioned goal of the company (Marr, 2017). Netflix’s attempts at predicting its customers’ viewing habits started back in 2006; when Netflix was still a DVD rental company, they launched the Netflix Prize. Netflix offered 1 billion dollars to the team that would come up with the best algorithm to predict how viewers would rate a movie based on their previous ratings (Marr,

2017). Even though, the first algorithms are constantly revised, they still constitute a key point of Netflix's recommendation system (Marr, 2017).

As Netflix switched from DVD rental business to video streaming, the algorithm became even more reliable because it depended less on self-reporting and customers' reviews, and more on data collection, such as when did viewers start to watch the movie or show, how many episodes of a series did they watch, what title were they watching right after or what kind of content were they looking for after finishing a show (Osur, 2016). Actually, the recommendation algorithm decreases the options by highlighting shows that it considers to be suitable for the user's taste (Jenner, 2018). In certain cases, this personalized approach indicates less flexibility and choice than that provided by the RCD (Remote Control Device) and the VCR (Video Recorder). However, Netflix cannot provide to the viewers a whole library at once for them to watch; they have to constantly work on it in order to personalize it. Since the content and preferences are never the same, Netflix cannot operate like Rotten Tomatoes, Pitchfork or IMDb, they need to understand their users and create suggestions customized to each person (Blattmann, 2018).

Moreover, Netflix's hyper-personalization marketing is found on the app home page. Netflix gives the ability to its viewers to rate content they watch with likes or dislikes (Sukhyani, 2020). The company mix this data with stream count information and individual user data in order to forecast the customer's favorite content (Sukhyani, 2020). Finally, Netflix uses this data to suggest personalized content in the form of push notifications. Often, the suggestions turn out to be so relevant that make the users feel that Netflix is familiar with their taste.

In order for Netflix to achieve this goal of "deep" personalization, the company combines a multitude of different algorithmic approaches to target the needs of each unique viewer, by providing a fully personalized interface (Netflix Research, 2018). Netflix uses big data analytics to track subscribers' preferences and viewing habits so that it can boost its provided recommendation services. Using these algorithms, Netflix has managed to make their content both accessible and niche, giving at the same time a voice to diverse audiences (McWhorter, 2018). Over 80% of what viewers watch comes from Netflix's recommendations (Netflix Research, 2018). Platforms like Netflix, which are based on machine learning, have the ability to recreate themselves through learning from their own customers (Blattmann, 2018). These developments on the recommendation algorithms turn out to play an important role for the future of the Netflix's business model.

Finally, one of the latest introductions to the personalized experienced that Netflix

offers to its viewers has been through its original series *Black Mirror* (2011 -), and more specifically through the launch of an interactive “choose your own adventure” film, *Bandersnatch* (2018). Netflix’s interactive model entails some obvious advantages (Damiani, 2019). *Bandersnatch* (2018) represents a modern method of data mining that offers Netflix deeper and more valuable audience insights than any show before, providing a clear connection for customers and advertisers (Damiani, 2019). First, it is more challenging, for the rivals, to hack and pirate, as for the traditional TV shows. Second, its playful format encourages the development of an interactive relationship with the viewer, providing therefore more engagement with the brand and its content. Perhaps, the greatest benefit is Netflix’s ability to collect data through subscribers’ engagement with the program and utilizing them in order to develop an internal algorithmic marketing model.

2.2.5. *Social media branding strategy*

In recent decades, social media are characterized by a series of technological advances in both hardware and software that encourage cost-effective content creation, connectivity and interactivity among Internet users and brands (Okazaki & Taylor, 2013). Individuals can use social media platforms for information sharing and socialization purposes, while firms can benefit from them by raising brand awareness, promoting their brands and establishing their presence (Anagnostopoulos, Parganas, Chadwick, & Fenton, 2018). Moreover, social media usage, which differs from the conventional computer-mediated usage, has gone mobile, offering both users and brands freedom regarding time and location restrictions (Okazaki & Taylor, 2013). Social media have global reach, while they, simultaneously, constitute a strong personalization tool, as they give a unique opportunity of interaction among individuals and brands (Okazaki & Taylor, 2013). In this way, small or bigger brands, like Netflix, have the chance to approach international markets of diverse geographical and cultural locations. The brand-building capability of social media across markets is important in an environment in which building brand equity is a central focus of marketers. Nevertheless, the social media content needs to be tailored to local audiences in order to take into consideration the cultural traits of each market (Okazaki & Taylor, 2013).

Although there are major limitations in customizing operations in conventional media, such as television, due to the requirement of shooting extra advertisements, social media is far more flexible and better positioned to promote the message when tailoring the execution to the local audience; the ability of brands to integrate visual, textual and even

verbal elements, on their social media strategy, is the core part of this process (Okazaki & Taylor, 2013). A brand's image may vary across national boundaries, as a company's branding strategy may appear to be inappropriate for a given market depending on its cultural and social norms.

According to Okazaki and Taylor (2013), there are three theoretical foundations that demonstrate how social media create value in the context of global branding and advertising: networking capability, image transferability, and personal extensibility. The aforementioned perspectives give marketers the opportunity to effectively approach audiences in diverse markets internationally. Social media provides the potential to focus on the networking capability that connects people with brands, on image transferability that allows marketers to create a brand with greater audiences than ever before, and on personal extensibility that encourages connections and partnerships to be established through far wider regional borders. For global brands, social media have the power to construct a strong international reputation.

Companies pay great attention to social media platforms for their branding and promotional campaigns, understanding the opportunity that are given to build a strong reputation with image transfer. TV networks are constantly utilizing social media to promote their productions and facilitate interaction with their viewers. As Netflix rejects certain conventional marketing methods, such as advertising on the platform, social media is an effective way to interact with the users, with the potential to approach local audiences, as well. While Netflix continues to engage with the viewers through email advertising, which remains a key component for Netflix's digital marketing strategy, social media is a vital aspect of its branding strategy in international markets (McWhorter, 2018).

On the other hand, social media is a fast-evolving environment, with executives not having a clear idea of what direction it might have (Kohli, Suri, & Kapoor, 2015). Social media tend to be disruptive to brand management, and there are legitimate concerns that social media may undermine the very existence of branding (Kohli, Suri, & Kapoor, 2015). As revealed by a Harvard Business Review Analytical Services study, only 7% of the respondents (n=2,100) successfully integrated social media into their marketing activities; most companies were still trying to understand the impact of social media on branding and searching for best practices regarding its use (Kohli, Suri, & Kapoor, 2015, p. 36).

Regarding Netflix, the company has an active presence in the main social media platforms, such as Facebook, Instagram, Twitter, and YouTube, while its branding strategies vary in each channel. Instagram is, basically a photo-based, platform with photos, videos,

GIFs and boomerangs being the most popular content shared. Content posted on Instagram, by Netflix, includes geotags, behind the scenes or on the making photos and videos, hashtags and tagged celebrities, while the audience highly interacts with it. The majority of Netflix's posts on Instagram are images, while there are also posts with scenes from the shows, the actors, memes, and puzzles, related to the content. Furthermore, Netflix has hundreds of market-focused social media channels and services that appeal to particular underserved audiences and focusing on local markets that have been traditionally overlooked by Hollywood for decades (McWhorter, 2018). Regarding the social media marketing of the Originals, each Netflix Original, for example the *House of Cards* (2013 - 2018), *BoJack Horseman* (2014 - 2020), *Sex education* (2019 -) and *Bird Box* (2018), have their own social media accounts on Instagram and Twitter in order to provide their followers with feed exclusively on their content on a regular basis (McWhorter, 2018). The strategies above suggest that Netflix has dedicated social media and public relations teams in each country, that they are streaming original content, in order to promote their brand image.

2.3. Greek market

2.3.1. Local market characteristics

To investigate the case of Netflix in Greece, it is imperative to address the main characteristics of the market and its media landscape. Greece is a small eastern European country of approximately 10.8 million people. Greek is the official language spoken in the country. The Greek language constitutes an important element of the Greek culture due to its uniqueness. The Greek culture is easily recognizable, as the country holds a strong brand image globally. Iconic images from the Aegean landscapes, picturesque Greek islands, the ancient monuments, such as Parthenon, and the traditional Greek food are rapidly associated with the country. Greek customs and traditions are a major characteristic of the Greek culture and they are mainly related to the Christian religion and the Greek Orthodox church.

2.3.2. Media and pay-tv landscape

The media sector in Greece shares some major characteristics with other Southern European countries; due to its size and peculiarities, is difficult to create the needed environment for the development of digital television (Papathanassopoulos, 2007). The evolution of digital television in Greece depends on social, financial and political conditions; smaller and less technologically developed countries do not easily pursue improvements in the field of new media due to the size of the market and the lack of resources available for

such an investment (Papathanassopoulos, 2014).

Due to the economic and political instability that occurred after the outbreak of the economic crisis in 2009, the development of digital television in Greece was affected as it was left completely to the initiatives of the private sector (Papathanasopoulos, 2014). The public service broadcaster ERT (Greek Radio and Television) was abruptly shut in June 2013 as part of the then government's attempts to reduce public expenses, justify the organisation's operation and to fulfil the expectations of country's creditors (Papadimitriou, 2017). In general, the Greek broadcasting sector is characterized by an excess of supply over demand; by 2014, the Greek broadcasting environment was overcrowded, with 160 private TV channels and 1200 private radio stations, "but none of them with an official license to broadcast" (Papathanassopoulos, 2014, p. 21). Since its launch in 1989 and until September 2018, where the National Council for Radio and Television allocated the licenses of legal operation to five television channels, while private television in Greece had been working with temporary licenses (Katsirea, 2017). However, in Greece, private channels and their content have always attracted more viewers than public television.

In general, the media market in Greece is characterized by low levels of trust in traditional media and journalism, and high use of social media for informational purposes (AthensLive News, 2017). However, this has to do with the low opinion of the news media, in general, than the quality of information in their news feeds.

Subscription TV made its appearance in Greece in 1994. Officially, the digital satellite transmission began in Greece in 1999 with the operation of the first digital TV platform, Nova (Filmnet). In 2009, Cosmote TV was founded by OTE, the largest Greek telecommunications provider. Until 2016, Nova was the leading pay-tv for the Greek market (Papadimitriou, 2017). Therefore, at the time Netflix arrived in Greece, the market could be fairly described as a duopoly dominated by the IPTV/satellite pay-tv Cosmote TV and the satellite pay-tv Nova. After 2016, with the arrival of Netflix in Greece, the competition for the pay-tv companies arose, as the entrance of the American company in the Greek market contributed to the development of pay-tv in the country (Protonatriou, 2017). Within a few years, the overall share of pay-tv reached 24% of the market (Protonatriou, 2017). However, this percentage was still significantly lower than the European average (37%).

In 2017, the television landscape transformed, as the convergence with telecommunications seemed to be the only solution for Greek pay-tv companies (Protonatriou, 2017). A new era for the market had emerged, where the convergence in the telecommunications and television industry created new opportunities for the 3.8 million

households and businesses that use telecommunications services and have access to the Internet and, therefore, could acquire television content via the Internet (Protonatariou, 2017). At the time, the Greek market counted approximately 950,000 pay-tv subscribers, with Cosmote TV and Nova being the leading platforms (Papadimitriou, 2017). The next year, Vodafone and Wind Hellas meant to raise the competition, by launching their pay-tv services to their customers offering competitive prices and alternative subscription options.

In 2020, together with Netflix, there are eight pay-tv providers in the Greek market, and more than 1 million subscribers (Papazoglou, 2020). At the same time, telecommunications and technology companies are offering more and more options for the audience to choose from, according to their budget and taste. Besides Netflix, Apple TV+ is, also, available in the Greek market since November 2019, offering subtitled content to the viewers. However, its library is still rather limited for Greece. Nova, the first platform that was licensed in Greece, counts more than 460,000 subscribers (Papazoglou, 2020). In the case of Nova, the price of the package is determined by the content offered; the more one pays the more one gets. Nova is particularly popular among the Greek audience for the sports content available via Novasports channels. In 2019, Nova launched its new platform, Novaflix, aiming to compete Netflix (Bota, 2019). Nova's new service is exactly imitating Netflix's model – even the brand's name resembles Netflix. Namely, Greek media articles are introducing Novaflix as “Netflix by Nova” (Zougla, 2019).

Cosmote TV is the leader of the Greek market with over 550,000 subscribers. Cosmote TV has 5 subscription options for the customers and provides one of the biggest libraries including categories like Sports, Cinema, Documentary, Greek productions, and Kids content. The subscribers have access to interactive services such as Cosmote TV plus, Movies Club, Cosmote Replay TV etc. (Papazoglou, 2020). Vodafone TV, created by the telecommunications company Vodafone Greece, counts approximately 200,000 subscribers in the Greek market. One of the biggest assets of the platform is the exclusive partnership with HBO. For the installment, a decoder is provided to the subscribers, and the service can work in up to 2 devices. Vodafone TV subscribers have the opportunity to have a package that includes Novasports channels, as well. Wind Vision, the official partner of Netflix in Greece, counts 55,000 subscribers since its entrance in the market in 2018. In the case of Wind Vision, the available subscriptions are of two types and, again, the price is determined by the available content. Moreover, Wind Vision is available without any time, location or screen limit, allowing members of the same family to watch, at the same time, other programs on other screens, TV, mobile or tablet.

In March 2020, the new Greek subscription streaming platform, Cinobo, launched in Greece and Cyprus, offering its customers a large collection of independent and arthouse cinema (Flix Team, 2020). According to Cinobo, mobile and home devices become a permanent personal film festival that gives everyone the opportunity to watch unlimitedly selected cinematic content from around the world with Greek subtitles. Nevertheless, Cinobo is distinguishing itself from other streaming and entertainment platforms as it will offer its customers selected and carefully categorized content (Flix Team, 2020). Since January 2020, Cinobo had already launched its official website and later they published, on their Youtuber channel, their first promotional teaser in Greek. Greek media executives are already comparing the new platform to Netflix, as a new and local option for the cinephile audience.

Currently, there is only one valuable network in Greece, the copper network of the incumbent (OTE) (European Commission, 2019). Nonetheless, since 2017, Vodafone and WIND have been expanding NGA networks capable of delivering ultra-fast broadband services. Deployment of fiber is rather restricted and there is no cable TV network. Overall, Greece has one of the lowest pay-TV penetration rates in Europe approximately to 24% (Mandravelis, 2017).

2.3.3. Netflix in Greece

Netflix began to offer its content services in Greece in January 2016, becoming popular among the Greek audience, which was eagerly waiting for its arrival; Greek social media users, even before Netflix's launch in the Greek market, had already created unofficial pages on Facebook where they were talking about the platform, whereas market's executives were foreseeing Netflix's impact on the Greek market. In the first years of Netflix's launch in the Greek market, the main issues were the breadth of its library (328 series vs 1157 and 1440 films vs 4593 in the US market) and the lack of availability of Greek subtitled content (Papadimitriou, 2017). This restricted the initial use of Netflix to Greek viewers who were fluent in English and others who could read subtitles either in English or in other foreign languages (French, German, Spanish). Netflix's response was not that quick; a year and a half after its entrance into the Greek market, a significant rise in both the accessible content and the subtitled movies and series, was made (Papadimitriou, 2017).

The entrance of Netflix did not trigger any particular policy disputes in Greece (Papadimitriou, 2017). The only constraints, that Netflix encountered throughout its operation, are the pre-sold rights of certain movies and series, especially to local providers Cosmote TV and Nova (Papadimitriou, 2017). A peculiar issue that arose, with Netflix's

entrance in the Greek market, was the fact that some Netflix original titles, specifically *House of Cards*, were distributed via satellite to Cosmote TV and later to SKAI free TV channel, while currently being accessible via Netflix in Greece (Papadimitriou, 2017).

On December 12, 2017 Netflix announced that it is going to provide its Greek audience with localized entertainment, as 70% of the content was already dubbed or subtitled in Greek (Netflix Media Center, 2017). The interface was translated, the payment system was adapted so that Greek customers could pay with their credit or debit cards and through their mobile carriers.

“We always knew the Greek people had a big appetite for great entertainment. Now we know it and we're delighted to offer a more localized Netflix experience in Greece that will continue to grow with great TV shows and movies from here as well as around the world” announced Jonathan Friedland, Chief Communication Officer at Netflix (Netflix Media Center, 2017).

With the lack of previous OTT services in Greece, Netflix's main competitor was pay-tv offered by DSL providers (i.e. Cosmote & Vodafone) (Papadimitriou, 2017). In April 2018, the Greek telecom operator, Wind Hellas, launched its online subscription video service Wind Vision, that it was the first platform that offered access to Netflix via a pre-installed app (Papavassilopoulos, 2018). Wind Vision was the first SVOD that incorporated Netflix as a service for its customers in Greece. As Wind CEO, Nassos Zarkalis, mentioned:

“There is no need for introduction for such brand, like Netflix, in the entertainment industry, that offers viewers a plethora of movies and TV shows to choose from. We are proud that Netflix has chosen Wind Vision as its partner in Greece” (Papavassilopoulos, 2018).

There are currently no Netflix's offices in Greece; “Netflix prefers to invest in its technical infrastructures rather than spending money on foreign offices and staff” (Lobato, 2019, p. 115). Like in other countries, programming and marketing strategies are managed in the Beverly Hills offices (Lobato, 2019). As for the majority of European countries, where Netflix is available, in Greece, local productions and movies are absent from Netflix's content. The fact that we are dealing with the case of a U.S.-centric platform is palpable; the dominance of U.S. media and the inequalities in the international television industry is an issue that should be taken into consideration while examining the programming of Netflix's films and series (Lobato, 2019).

2.3.4. *Netflix on Greek social media*

Social media is an important element of this research; therefore, it would be helpful to provide brief information regarding Netflix's presence on Greek social media. In recent years, Instagram is becoming the fastest growing social media network for marketing in Greece, with its quarterly change in the total advertising audience increasing by 3.3% in January 2019 (DataReportal, 2019). Several media companies in Greece are using Instagram for promotional purposes. However, none of Netflix's local competitors in the Greek market has an Instagram account; they incorporate their branding strategy on company's corporate profile (e.g. Cosmote – Cosmote TV). Nova has a Novasports Instagram account³ to brand its sports content.

Despite the absence of Greek productions, Netflix employs a unique marketing strategy in the Greek market. The distinctive element of Netflix's expansion in the Greek market is the collaboration of the company with the Greek social media agency Redirect. The agency is responsible for Netflix's Greek social media accounts on Facebook, Instagram, and Twitter, offering Greek content to the audience and promoting brand image. Netflix successfully promotes its content on social media for a long time, as social media field works as a suitable environment for TV networks to connect with audiences (Beer, 2019), increase box office numbers and their viewers (Martín-Quevedo, Fernández-Gómez & Segado-Boj, 2019). The company has managed to handle social media as a useful tool that keeps Netflix content at the forefront of the conversation fascinating both viewers and creators (Beer, 2019).

Netflix has official regional Instagram accounts in all the countries that the company offers its services. Netflix has a Greek Instagram account since December 2017, where the company started offering localized Greek content to the audience. As already mentioned, *Redirect* agency manages the Instagram account, sharing engaging content with their followers, that are more than 100,000. Netflix, through its social media strategy, educates the users about their new programs and premier launches and encourages them to watch its content (Beer, 2019).

As mentioned above, even before Netflix's arrival in Greece, Netflix's fans have already created several unofficial fanpages on social media platforms, in which they share tips, their preferences, reviews, spoilers, brand content, memes, or even links to pirate websites that illegally distribute Netflix's content. The most popular among users has been

³ Link to Instagram account <https://www.instagram.com/novasportsgr/>

“Netflix Fan Community in Greece”⁴ on Facebook that was created on 10 May 2016 and counts more than 47,000 members.

Taking into account the aforementioned innovative solutions, that social media offer, we are going to examine their role in international branding of Netflix and, more specifically, the features of Netflix’s social media branding strategy in the Greek market.

⁴ Information retrieved on 17 May 2020 from <https://www.facebook.com/groups/254821561538610/>

3. Methodology

The purpose of this section is to describe and explain the design and the suitability of the research method that the researcher is going to use in order to answer the research question of this thesis: *How global Brand Netflix is branding its services for the Greek market?* This study focuses on Netflix's branding strategies used in their Greek Instagram account and how this is represented on that social media platform. In addition, the research is supplemented by the analysis of articles in the Greek media in order to examine how Netflix's branding and marketing strategies are implemented in the Greek market and how market's executives see them. The method of qualitative content analysis, and to be more specific, the technique of textual thematic analysis, have been chosen in order to address the research question. This chapter begins with a justification of the choice to use qualitative content analysis and an explanation of the research design. The following sections describe the process of data collection, the process of data analysis, and the operationalization of key concepts. This chapter concludes with a brief discussion of the validity, the reliability, and the credibility as related to this research.

3.1. Qualitative content analysis

To answer the research question discussed in the previous chapter, qualitative content analysis is the appropriate methodological choice for several reasons. Since the purpose of this study is not the enumeration, but rather the clarification and explication, the researcher adopted a qualitative content analysis methodology (Mcdowell, 2004). According to Babbie (2011) qualitative analysis is the "examination and interpretation of observations, for the purpose of discovering underlying meanings and patterns of relationships" (p. 419). Unlike a more statistically oriented quantitative method, qualitative analysis goes beyond simply counting words and sentences within the dataset. Qualitative analysis explores concepts and patterns that may be present and latent in a particular text.

Neuman (2014) lists content analysis as a nonreactive research methodology, since the creators of the data did not know that someone would analyze it, and describes it as the method that lets us "discover and document specific features in the content of a large amount of material that might otherwise go unnoticed" (p. 49). Content analysis is mostly used in the qualitative research for descriptive purposes, where the content of a communication medium is systematically gathered and analyzed (Neuman, 2014).

For the analysis of both Instagram posts and media articles the technique of thematic analysis is applied, so that the basic categories and patterns to be established. Braun and

Clarke (2006) define thematic analysis as a “method for identifying, analyzing and reporting patterns (themes) within data” (p. 79). Thematic analysis is a widely used analytic method as it offers the requested flexibility to approach and analyze qualitative data (Braun & Clarke, 2006). With the use of qualitative content analysis, and more specifically thematic textual analysis, the researcher is able to examine how Netflix’s global branding strategies are introduced in the Greek market, and in this way, gain a better understanding of the data, through the process of organizing, segmenting, examining, conceptualizing and categorizing them (Boeije, 2010).

Media content analysis is a well-established research method (Macnamara, 2005). No content analysis can start without any kind of conceptual framing (Mcdowell, 2004). The type of framing may vary, based on the literature and the previous research on the particular topic (Mcdowell, 2004). In this case, the data is not simply organized and summarized, but the researcher will interpret them, in an attempt to understand the importance of the patterns and the underlying meanings within the dataset (Braun & Clarke, 2006). The study is, also, data-driven, as it aims to search across the dataset for repeated patterns and emerging themes, which will allow us to examine the data in a holistic way. As already mentioned, one of the main advantages of thematic analysis is flexibility, which gives the researcher the opportunity to combine both a theoretical and an inductive approach while coding the dataset.

3.2. Data collection and data analysis

The collection of data is explicitly conducted within the framework of this research, aiming to tackle the question at hand. The gathering of the final dataset has been done by the end of April 2020. Since there is a great amount of data that needs to be analyzed, and in order to facilitate the process of data collection and analysis, qualitative research software was used (Stemler, 2001). Qualitative data analysis software, like Atlas.ti, helps the researcher deal with volumes of data as it works as a note-taking tool providing help to the concept mapping (Babbie, 2011). To be more specific, all the articles gathered are transformed into Word documents and all the Instagram posts have been downloaded and screenshots were taken from the Greek Netflix account (@netflixgr) for the purposes of this research. The articles have been entered in Atlas.ti to facilitate coding process, as the program contains useful features for the researcher to look for particular keywords within the data, create quotations, list the codes and apply categories easily. The Instagram posts have been manually coded by the researcher, after entering them in an Excel spreadsheet,

and valuable insights are gained with the creation of pivot tables.

According to Braun and Clarke (2006), the six phases of the thematic analysis are the following: “familiarize with the data, generate initial codes, search for themes, review themes, define and name themes and produce the final report” (p. 87). To begin with, during the data gathering the researcher has been taking notes of the useful points spotted within the dataset in order to familiarize with the data and determine the preliminary categories and subcategories that emerge. In this way, key features within the data are being singled out, as it was easier for the researcher to give them the needed attention during the analysis. The initial codes and themes have been established by the theoretical framework presented.

Thematic analysis is a useful tool to examine patterns and trends in documents (Stemler, 2001). The process of preliminary analysis begins during the data collection, where the researcher starts to notice patterns of meaning and interesting theme/categories within the data (Braun & Clarke, 2006). Nevertheless, thematic analysis is not a one-way process and it requires time commitment (Braun & Clarke, 2006; Babbie, 2011); the researcher needs to constantly go back and forth to the dataset, reading the text in order to understand the meaning of each segment and identify the categories of interest that emerge.

3.2.1. Sampling

For this research, the sample was constructed following the three-step process detailed by Newbold et al. (2002). At first, the media form and the genre of the data should be selected. Secondly, the period of the examination should be determined. And finally, the relevant content within the data should be clearly defined. In this study, purposive and systematic sampling methods have been applied. This thesis is based on data gathered from Netflix Instagram posts, on the Netflix Greece account (@netflixgr), with the first post shared on December 11th, 2017, and the last one on December 31st, 2019 (307 posts), and selected articles published on Greek media since the entrance of Netflix in Greece (January 2016) until April 2020 (20 articles).

3.2.2. Instagram posts

The Netflix Greece Instagram account has been chosen as it is the most active social media account of the brand in the local market. The posts of the Greek Instagram page of Netflix have been gathered and downloaded into an Excel sheet so that the research can proceed to the process of analysis. Important information such as the date, the description, the type (i.e. image, video, carousel of images), the tags and the hashtags have been collected in

order to be studied. When studying Instagram, it is imperative to take into consideration the visual dimension of the platform and the role of visual elements have in branding. For this reason, together with the textual data of the posts the researcher has gathered the images in order to proceed into the thematic analysis of the visual elements, as well. Significant attention is given to the kind of content that Netflix has shared on its Instagram profile, as Instagram represents a useful tool for maintaining a brand identity online. Moreover, prior research has showed that almost 30% of the material shared on Instagram by local US TV networks has promotional purposes (Martín-Quevedo et al., 2019).

For this thesis, 307 posts from @netflixgr have been gathered and analyzed. The decision to gather all the posts that the brand has shared on Instagram since the beginning, is to have a better understanding of how Netflix's branding strategy evolved in the Greek market through the years and spot the differences and the similarities since then. It is noteworthy that the comments under the posts and the likes of the posts are not considered in the results of this study, as the aim of this thesis is to understand how Netflix is branding itself in the Greek market, without the notion of how the audience is responding to its strategy. The captions have been translated into English taking into consideration the cultural aspects of such an approach.

3.2.3. Media articles

This study is supplemented by Greek media articles in order to employ an in-depth analysis of Netflix's presence in the Greek market. Twenty articles from top Greek media are selected according to media's online and offline readership. Top Greek online newspapers and magazines including kathimerini.gr, tanea.gr, tovima.gr, athinorama.gr, themanews.gr (in English), amna.gr (the Athenian and Macedonian news agency), athensvoice.gr (free press), insider.gr, fortunegreece.com, and Esquire magazine have been chosen. Six of the articles were published in 2016, four in 2017, four in 2018, four in 2019 and two in 2020. The articles were selected according to their topic and their relevance to the research question.

3.3. Operationalization

According to Boieje (2010), analysis consists of segmenting the data and reassembling them, with the aim of transforming the data into findings (p. 94). Coding is an essential element for the process of thematic analysis; with the procedure of coding the researcher has the ability to interpret and manage the data. In the beginning, after the data

collection, textual data should be carefully divided into fragments, grouped into categories and labeled with a code (Boeije, 2010). This first phase is called open coding and is crucial in order to have a meaningful study. Open coding enables the researcher to organize the data and to have an initial thematic approach, either manually or within a software program (Boeije, 2010). This process results in a list of codes referred to as “coding scheme” (Boeije, 2010, p. 98). To continue, axial coding is a rather abstract process that clarifies the relationship between categories and subcategories, specifies each theme and pattern structured in the initial coding scheme and identifies whether the role of each category is important for the analysis or the category should be rejected (Boeije, 2010). During the axial coding, new ideas and categories are generated and the existing scheme is modified in order to result in the most suitable coding frame for the purposes of the thematic analysis. The last phase of the coding process is the selective coding, where the researcher is looking for the “core category” of the study (Boeije, 2010, p. 115). The core category or core concept of the research does not simply emerge from the data but is the researcher that constructs it through his observations. During this last phase, the main concepts of the research, and the relationships between them, should be identified in order to be able to answer the research question.

Qualitative content analysis typically combines a variety of both concept-driven and data-driven categories within any coding frame (Schreier, 2013). This flexibility provided by the method gives researchers the opportunity to come up with categories that might be derived from the content of the articles and posts analyzed, but also, categories that are based on a theoretical framework. The theory and literature discussed in the theoretical framework work as a foundation for the categories that the units were first assigned. Content analysis will help us test the theoretical issues of branding and marketing in order to gain a better knowledge of the field (Elo & Kyngäs, 2008).

In order for the analysis to start, all the Instagram posts have been assigned to categories according to their type (*Photo, Video, Carousel of photos, Memes, Puzzles, Reposts, and UGC (user-generated content)*), product type (*Series, Movies, Other*), and if their content contains Netflix Originals (*Originals, Not Originals, Other*). The Instagram posts have been assigned to categories according to whether or not they have Netflix’s Logo, Symbol or Brand Name either visual or textual. Moreover, the posts have been tagged according to Netflix’s Product Name (name of the series, movies or services). Following to this categorization, the most frequent post for each year and the most advertised content derived. In this way, it became easier for the researcher to identify the branding model that

Netflix followed through the years, the new and the repetitive patterns and the purposes of the Instagram usage by the brand. Another element was the tags; the posts that contain tagged accounts (actors, series, or movies' accounts) have been categorized as well. Furthermore, in order to facilitate the analytical process, three extra categories have been created for the posts: *Localization*, *Binge-Watching*, and *Netflix Originals*. Finally, the category *Emotions* has been added, with the most prominent being the emotions of *Nostalgia* and *Humor* in various posts, as visual elements, like photos, frequently carry socioemotional messages, as well (Martín-Quevedo et al., 2019).

For the analysis of the articles, the first step was the development of an initial coding frame that includes categories and sub-categories (Schreier, 2013). The concepts, discussed in the theoretical framework, related to global brand Netflix and the Greek market, offered a foundation of patterns and categories for the researcher to assign the segments within the data. Those categories were given a name and a definition and then were assigned to examples within the data (Schreier, 2013). The initial coding frame consisted of two articles, one from the Greek newspaper *Ta Nea* (News) written by Stelios Papathanassopoulos and the other one from the *Athenian and Macedonian News Agency* (amna.gr). The first article was published on January, 2016 and had to do with the arrival of Netflix in Greece under the title *Netflix and its impact*, while the second one was published on December, 2017 when Netflix started providing localized content to the Greek audience under the title *Netflix is officially in Greece today*. Continuously, all the articles were analyzed, and each unit of meaning was labelled with a code and a description. The first categories that derived from the data based on the theoretical framework were the following: *Localization*, *Personalization*, *Binge-watching*, *Netflix Originals* and *Characteristics of the Greek market*.

Moreover, the researcher attempts to read through the data carefully in order to gain better understanding and new knowledge of the existing phenomena and theories. In this way, new categories and sub-categories have been created, while the first broad categories have been replaced. Therefore, the researched attempted a mixed approach, where the first codes and categories were extracted from the previous theory, while there were new ones that emerged from the data analysis of both articles and Instagram posts. The extra categories that derived from the data after the content analysis of the media articles are the following: *Netflix's action plan*, *Competition for Netflix*, *Promotional content*, and *Informational content* about Netflix and its services. Additionally, the category *Personalization* is transformed to *Technology and operations* in order to be more inclusive.

3.4. Validity, reliability, and credibility in qualitative research

Content analysis is a research method to provide valid outcomes from the data to their context aiming to acquire useful knowledge and valuable insights on a researched issue (Elo & Kyngäs, 2008). According to Elo & Kyngäs (2008), the outcomes of the analysis are the concepts and the categories that describe the phenomena (p. 108). To begin with, the analysis is based on reliable and valid data gathered by the researcher. In order to provide the requested validity and transparency to the research, the process of analysis and the results is described in detail and the quoted units is translated into English. Regarding the reliability of this study, it is expected that the findings of this qualitative analysis cannot be encountered in any other paper. Furthermore, for the credibility of the research, the analysis is based on the existing literature and findings should have a clear connection with the theory and previous research (Silverman, 2011). Finally, the researcher is confident that the dataset selected is the most appropriate for content analysis and the data collection method the most suitable (Elo et al., 2014).

4. Results and Discussion

In this chapter, the results of the qualitative content analysis are presented and discussed against the backdrop of the theoretical framework. This section is divided into two main parts. In order to provide the answer to the research question, this study's focal points are, first, the examination of the branding strategy applied by Netflix through the analysis of the posts of Netflix's Greek account on Instagram and, secondly, to explore Greek market's executives impressions on Netflix's presence in Greece, as the latter was discussed in articles from the press.

While analyzing the Instagram posts, several elements have been examined in order to explore the way Netflix is using the platform to brand itself for the Greek market. Previous research on the field has shown that more than one third of the posts shared by Netflix on their American Instagram account is linked with the promotion of its content together with informational posts (Martín-Quevedo, Fernández-Gómez, & Segado-Boj, 2019). Specifically, by scrutinizing the Instagram posts of Netflix Greece, five overarching categories became apparent:

- *Brand Identity*
- *Localization as a branding strategy on Instagram*
- *Netflix and binge-watching on Instagram*
- *Netflix Originals at the front row*
- *Branding Netflix with emotions*

From the analysis of the media articles, it has become apparent that the core of Netflix's presence in the Greek market is found in the company's predominant attempts to adapt its services to the Greek audience's preferences. However, there are multiple challenges in the process of offering localized content and services to the target market.

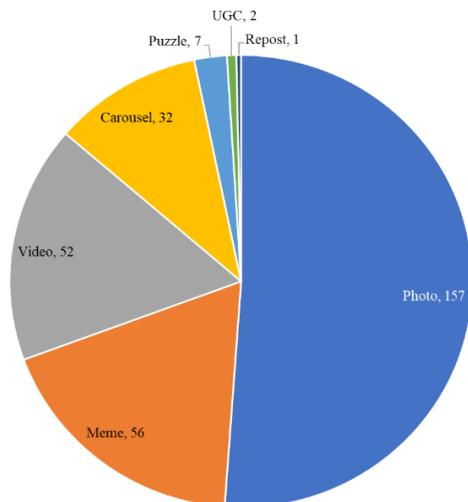
After analyzing the media articles, seven categories emerged:

- *Localization*
- *Greek market*
- *Competition for Netflix*
- *Netflix's action plan*
- *Netflix Originals*
- *Binge-watching*
- *Technology and operations*

4.1. The branding strategy on Instagram

The profile on Instagram is located in [instagram.com/netflixgr](https://www.instagram.com/netflixgr). Sharing of posts was performed approximately 3 to 4 times per week. In 2017 (since December 11th), there were 29 post shared, on 2018 there were 138 posts and on 2019 there were 140 posts by the Greek Netflix account on Instagram. Regarding these numbers, there are no significant changes through the years with the exception of 2017, when the profile was created, and it was live for only 20 days. As portrayed in Figure 1, 51% (n=157) of the overall posts are *Photos*, 18% (n=56) are *Memes*, 17% (n=52) are *Videos*, 10% (n=32) are *Carousels* of photos, 2% (n=7) are *Puzzles*, 0.7% (n=2) are *UGC* (user-generated content), and 0.3% (n=1) is *Repost*. At first point, this categorization has been made in order to gain a better understanding of Netflix strategy on Instagram and how is the brand using the platform as a branding tool. Instagram is a platform that utilizes photos as its primary communication mechanism (Anagnostopoulos et al., 2018). As audiences are turning away from traditional media, because of their preferences on skipping advertisements and focus on the visual marketing of brands, Netflix had to meet these expectations.

Figure 1. Top Instagram posts by type (n)



4.1.1. Brand Identity

Netflix uses Instagram to demonstrate its brand identity through the promotion of its content and services. Using images is an important aspect of constructing and promoting the brand identity (Elikan & Pigneur, 2018). For Netflix, branding is a result of multiple separate aspects including brand name, logo, colors and more. These characteristics give the ability to brand Netflix to distinguish itself in an increasingly competitive market. According to Netflix Brand Site, their primary logo is Netflix Red on a black background. This is to

create a premium cinematic feel as they continue to set the industry standard for original content. Moreover, on the site there are guidelines for the usage of Netflix's logo and symbol, including recommendation and avoidances.

With the portrayal of its brand logo and symbol on the posts (Figure 2), Netflix manages to establish its presence in Greece, by exposing the audience to these visual elements, so that they connect the promoted content to the brand. Netflix understands that Instagram is an environment where the brands can express their identity by providing engaging content directly related to them and their products.

When Netflix account was first created on Instagram, the need to showcase its brand name was bigger in order to establish its presence in the Greek market. In 2017, all the posts carried the name of the brand in the form of the following *hashtags* #netflixgr, #netflixgreece and #netflix. However, at the time, the logo and symbol of the brand were absent from the posts related to its content. The next year, 2018, the numbers of the posts that carried the brand name either *hashtag, logo or symbol* were equal to those that did not have any mention to the brand. The brand was managing to connect its name with its content and services in the Greek market therefore, the audience could recognize its iconic series and films just by watching a scene or the leading actors. In 2019, only 36% (n=51) of the years' posts carried the brand name in any form. From this it becomes apparent that Netflix did not need to introduce itself anymore to the Greek audience, as its content speaks on its behalf. Among the 307 Instagram posts, 158 carry the brand name while 149 do not.

In general, Netflix has managed to create a solid presence on Instagram, through its content. The brand's strategical use of logo, symbol, colors and structure of the posts indicates a strong sense of branding on the Netflix Greece Instagram account, where one can immediately recognize the company just by visiting the profile.

Figure 2. Netflix's logo and symbol



Figure 3. Examples of posts carrying hashtags with the brand, and brand logo



Narcos

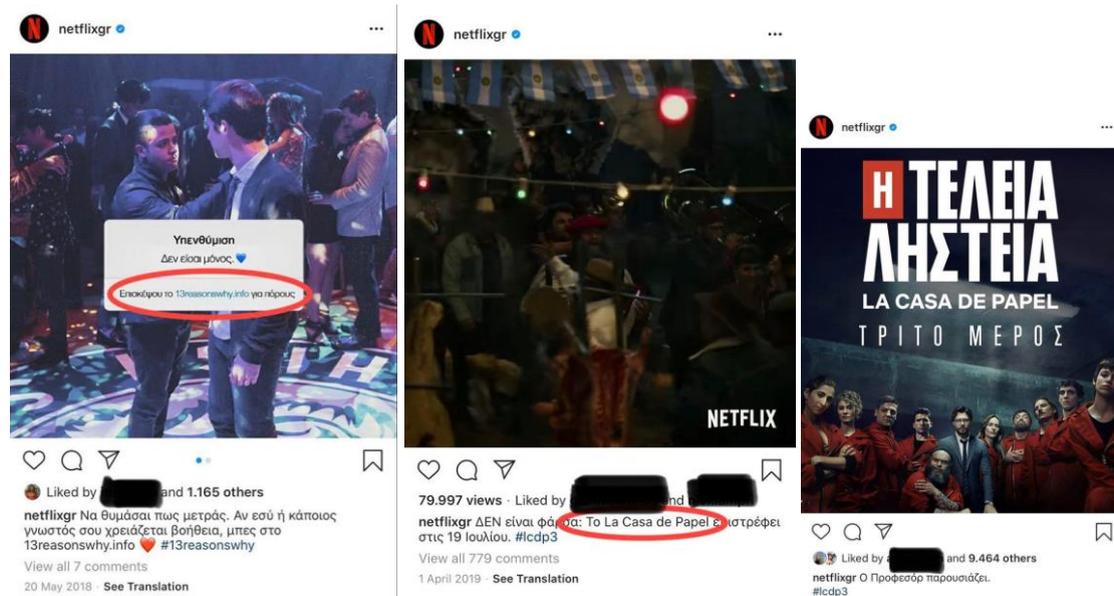
Rapture

4.1.2. Localization as a branding strategy on Instagram

By the time Netflix started offering localized content to the Greek Market, December 2017, they collaborated with a Greek social media agency, *Redirect*, in order to manage its Greek social media channels. Netflix pays great attention to the strategy of localization when entering a new market. Localization on Instagram involves on adapting the brand's content and messaging to the local market so that it is meaningful for the target audience taking into consideration its cultural background and experiences (Farris, 2018).

As for the case of Greek Instagram account, all the posts have Greek written texts, which does not only imply simple translation, but cultural understanding. However, there were few cases where the translation more looked like Google translating and did not have language fluency. In figure 4, the phrase "Visit 13reasonswhy.info for resources" in the notification box is poorly translated as the term "resources" does not indicate the right meaning when translated in Greek. Moreover, the titles and the logos of the TV shows are not all translated in Greek, which is something reasonable as the audience is familiar with the original titles. For example, the popular Spanish TV series *La Casa de Papel* has both an English and a Greek title, but the Greek audience is used to the original Spanish one. There are, also, posts with the Greek logo, but they are the minority and again the post carries the Spanish title as well. Interestingly, series as the *Friends* is popular with the Greek audience since 1995, when Greek channel STAR got the rights for the show. Therefore, the series is established in the Greek audience with its Greek name, *Filarakia*. In this case, Netflix is using the already established name for the series.

Figure 4. Examples of localized content



13 Reasons why

La Casa de Papel(1)

La Casa de Papel(2)

In addition to the Greek captions and translations, 22 of the overall posts carry additional elements of localization. Most of them (n=13) are memes, adapted to the Greek reality, reflecting Greek traditions (e.g. Greek Easter, Clean Monday etc.) or, in general reflecting Greek habits. Localized memes are used by Netflix for marketing purposes, as they mostly promote its content while entertaining the audience. A worth sharing example is the post for the Greek Pride (Figure 5). The content is related to the series *Sense8*, while simultaneously incorporates the reference to the event. This implies Netflix's integration of content related to the contemporary reality of the country. Netflix acknowledges the impact the content has when it resonates with the audience. Simultaneously, there are posts that carry popular humoristic hashtags (e.g. #itsallgreektome) and reference Netflix's content.

However, localized memes do not always have to do with the content; they usually have a meaningful impact to the audience that resonates with them by identifying elements of their everyday life. For example, in Figure 6, these three memes can only be understood by the Greek audience since they portray occasions of the Greek reality.

Figure 5. Memes with references to Greek reality



Figure 6. Announcement of season finale with references to the Greek Pride slogan “ΠΑΡΟΥΣΑ” (Present)



Sense8

Figure 7. Use of “It’s all Greek to me” hashtag



Dark

4.1.3. *Netflix Originals at the front row*

As previously discussed, Netflix is branding itself with its original programming. Netflix’s programming has changed through the years from licensed content to original content. Netflix Originals represent the most promoted content on the Greek Instagram account, with 64% of the overall post referencing to original content (n=202). As visible from Table 3.0, Netflix’s promotion of the original content is at the forefront of its Instagram branding strategy. The analysis has shown that the most advertised content is the following: *La Casa de Papel* (n=26); *Stranger Things* (n= 20); *Black Mirror* (n=11); *The end of the fucking world* (n=9); *Dark* (n=8); *Bright* (n=6); *Sabrina* (n=6); *Roma* (n=5); *Narcos* (n=5); *My Next Guest Needs No Introduction with David Letterman* (n=5); *Everything sucks* (n=5); and *13 reasons why* (n=5). Out of the 12 top posts (that incorporate Netflix’s content), only the film *Roma* (2018) is not a Netflix original production. Most of the posts had to do with Netflix announcing the release of a new season/chapter of the aforementioned series. Posts about new programs or new seasons are made as soon the information is reveal by Netflix Officials, while the follow up posts are coming up frequently by the premiere.

Overall, the posts including the Netflix Originals are informational posts about the availability of the content on the platform. Frequently, Netflix publishes, on Instagram, an informational post about the releases of the month.

Table 3.0

Instagram posts containing Netflix Originals

Category	Total (n)	Total (%)
<i>Posts</i>	307	
<i>Originals</i>	202	64%
<i>Not Originals</i>	74	24%
<i>Other</i>	31	10%

4.1.4. Netflix and binge-watching on Instagram

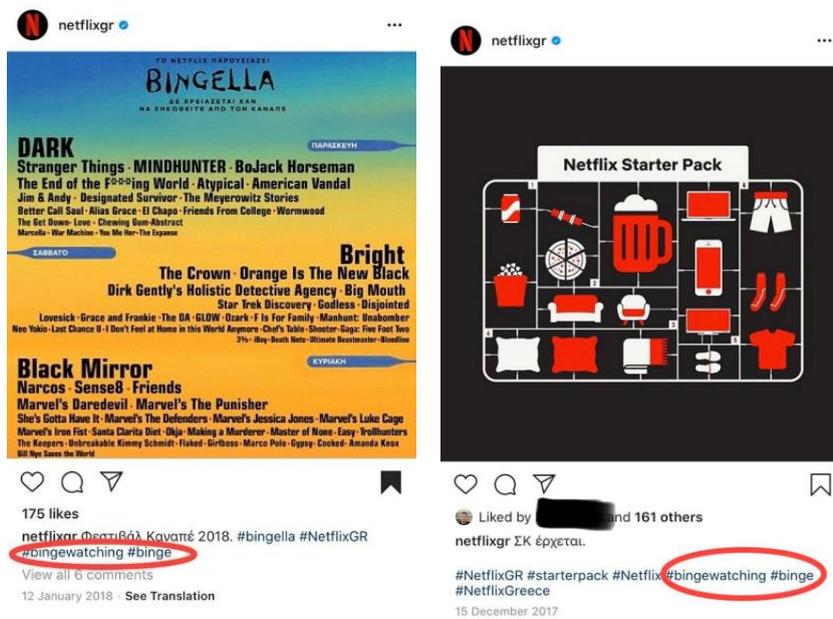
The term binge-watching has been introduced to the Greek audience by Netflix and its services. Netflix is branding itself through the practice of binge-watching (Jenner, 2018). Moreover, according to Jenner (2018), marketing of the binge-watching practice legitimizes the viewing habit, thus the platform that introduces this habit. Netflix strategically pushes viewers to binge-watching with its programming and the constant marketing of it. Netflix mainly utilizes the series as a branding tool to establish the binge model. This becomes prominent by the content shared on its Instagram account, as well. The vast majority (n= 215) of the posts contain scenes, actors and memes from Netflix's most popular TV series. Besides the promotion of the series, 17 of the overall posts, shared on Netflix Instagram Greek account, carries binge-watching elements (e.g. hashtags, memes) (Figure 8).

Table 4.0

Instagram posts' content

Type	Total (n)	Total (%)
<i>Posts</i>	307	
<i>Series</i>	215	70%
<i>Movies</i>	56	19%
<i>Other</i>	36	11%

Figure 8. Instagram posts with binge-watching hashtags



4.1.5. Branding Netflix with emotions

Brands are not just built on their product, but also on the emotions that evoke to the audience (Treseder, 2018). In this way, brands that have a positive impact on the audience’s emotions are most likely to be better established and remembered.

With 29 of the overall posts carrying the nostalgic emotion, the fact that the brand is using Nostalgia as a communication strategy, on Instagram Greece, is palpable. As defined by Svetlana Boym in Stephan (2019) “nostalgia is a longing for a home that no longer exists or has never existed” (p. 26). For example, *Stranger Things* evokes the nostalgic effect as this show is set in the 1980s. In the posts (n=20), Netflix uses explicit 1980s settings in order to create this nostalgic emotion. *Everything sucks* is another series that carries the nostalgic emotion as its scenes are set in the 1990s. *Everything sucks*’ posts (n=5), represent the series’ scenes, actors and objects referencing to the 90s (e.g. Class of 96, floppy discs). Accordingly, *Glow* series (Gorgeous ladies of wrestling) is an adaptation of a 1980s women’s wrestling team, which scenes create an atmosphere of the past. Netflix itself, through these series, connects its brand with the nostalgic narrative and simultaneously “provides new takes in the line with contemporary audiences” (Boym, 2019, p. 26). Netflix Originals positions the streaming platform as an opportunity to place its content in a deeply interactive and emotional environment, connecting the audience that is craving for the prosperity of the past with the brand Netflix (Boym, 2019). Despite the aforementioned series, there are, also, meme posts with references to the past as posts with the Nokia 3210 cellular phone (Figure 9).

Figure 9. Instagram posts with elements of *Nostalgia*



Stranger Things

Everything sucks

Glow

Meme

Some of the most memorable marketing posts have humorous elements on them (Olenski, 2018). Brands use humor to grab the audience’s attention, get remembered, gain people’s trust and, therefore, establish their “name brand” in a new market through differentiation (Olenski, 2018). Humorous posts and memes are used by TV industry as they are popular for conveying relatable emotions and scenarios (Gilliland, 2018). Netflix uses this kind of posts on its social media branding strategy to promote its content. Taking snippets or scenes from its own content, Netflix creates memes that are both related to their series and movies, but simultaneously they incorporate references from the local market or social experiences. 18% (n=56) of the overall content shared on Netflix Greek Instagram is memes. Their posts that depict memes are truly funny with accurate references to the Greek audience and they represent something refreshing for the market. For example, in figure 10 the content is related to *Bandersnatch* episode of *Black Mirror*, but also the boardgame of Snakes is incorporated to the post giving a playful tone.

Effectively positioning a brand includes building a successful emotional connection with the audience (Treseder, 2018). When associating Netflix with a positive emotional experience, either nostalgic or humorous, the audience is encouraged to perceive of Netflix branding itself as positive.

Figure 10. Humorous memes referencing Netflix Originals



Bandersnatch

Summary

Netflix maintains a uniform branding presence on Instagram, which is creating a global ‘Netflix culture’. Netflix’s branding strategy on Greek Instagram emphasizes on effectively inform the audience about new releases and seasons’ premieres with weekly and monthly posts, while mainly promoting Netflix original series. Localized posts are the proof that the brand is focused on the specific market. However, the efforts of localization are rather broad and not that meaningful; Netflix’s strategy lacks deep understanding of the local Greek culture, while it seems like superficially responding to country’s differences and special characteristics.

Moreover, Netflix has strategically connected the term “binge-watching” to its brand on Greek Instagram, transforming it from a relatively marginalized practice of the viewers to a fun and cool habit everyone should adopt. Overall, Netflix has built a big and engaged community on Instagram platform sharing posts that mainly encourage interaction with the users, such as memes and content that carries emotional elements. However, besides the engagement of the followers, it is hard to figure out whether Netflix’s branding strategy would lead to potential consumers of its services.

4.2. Analysis of the media articles

4.2.1. Localization

As discussed earlier, localization is a widely known branding strategy in the television industry (Chalaby, 2002). Netflix engages deeply in the process of localization when enters a new local market.

Hellenization of the services

As Papathanassopoulos (2016) states, the successful presence of Netflix in Greece will depend on the Hellenization of its programming. In other words, is dependent on whether the company will manage to offer the anticipated localized experience to the Greek audience. Among the easier to achieve strategies that media companies use to localize their offerings is the subtitling, dubbing, or the addition of live voiceovers to their content (Lobato, 2019). Despite the fact that the aforementioned strategies are the first steps for localization in the TV industry, Netflix did not meet the expectations when entering the Greek market. The dissatisfaction of the Greek market's executives became evident from their reactions on press.

At first, there was no content available with Greek subtitles or content dubbed in the platform, which was something that got into the executives' eye when introducing Netflix to the audience. In 2016, all articles mentioned this absence. On January 2017, one year after Netflix's arrival in Greece, there were still a major lack of Greek subtitles in its entire catalog (Farkonas, 2017). According to Farkonas, Athinorama (2017), at the time, 119 movies, series or documentaries with Greek subtitles were offered, and only 7 movies or series dubbed in Greek; and that was the progress for the year. He argued that those who did not have enough reasons in 2016 to pay for a subscription in Netflix, they would not change their minds for the next year either.

In the summer of 2017, just a few months before Netflix started offering localized services in Greece, the company signed a partnership with the Greek graphic design agency *Corn Studio*. In 2019, the team of Corn Studio gave an interview to the Greek data journalist, Panselina (Ethnos), talking about their collaboration with Netflix. The graphic designers are responsible for the Greek logos of Netflix series and movies until 2020. Netflix efforts to provide localized experience to the Greek viewers were, mainly, subsumed into this partnership; the aim of the brand is to adapt its services to the Greek market in order to meet the expectations of the audience and attract new subscribers. In just eight months they had to redesign more than 700 logos of TV series, movies, documentaries and shows for the

Greek Netflix. As the Greek team told Panselina, Ethnos, (2019), “the difficulties we faced had to do with the complexity of the Greek characters. We had to try to bring out the right sense of English titles in Greek language”. There are several factors that need to be taken into consideration when translating and creating logos for Netflix (Lobato, 2019). Greek language does not have a Latin alphabet; therefore, it makes the process even more complicated to successfully adapt the phrases and expression to the Greek idiomatic language. Moreover, fonts must be carefully selected, being conscious, in the process, of cultural connotations and visual aesthetics (Lobato, 2019).

On February 2019, Farkonas, Athinorama, made the re-evaluation of the four-year presence of Netflix in Greece, in order to provide the audience with useful details regarding the progress made. Despite the four-year presence, for the Hellenization of the programming there were still complaints. On the one hand, there was the issue of translation. Progress has been made, but it is still not satisfactory; many of the series, which offered a dubbed version in Greek, were not popular shows in Greece, while dubbed versions of children’s Hollywood movies that did appeal on some audiences, were very few. The list expands significantly for children’s content, dubbed or translated, even if it cannot be considered fully satisfactory in this case either.

Content limitations in the Greek library

To continue, when Netflix entered the Greek market, the content library available to local viewers was extremely limited and the platform lacked a Greek-language interface. The articles released in the Greek press made clear the dissatisfaction of the market regarding the limited localized experience. As Chatziioannou, Oneman, (2016) stated: “Many are complaining about the limited number of new series and movies”. Moreover, one of the ten key questions about Netflix discussed by Papazoglou, Insider, (2016) was if all Netflix series would be available in Greece, giving the answer that despite the fact that Netflix has many Original productions popular among Greek viewers, like the *House of Cards*, the latter will not be, initially, available to the Greek audience. The explanation given by the journalist is that due to “agreements signed by content providers in Greece”, who had the streaming rights for the aforementioned series. However, she, then, highlighted that “the list will be steadily enriched” by Netflix. At the time, Farkonas, Athinorama, (2016), in his article “Our practical impressions”, gave a clear picture regarding the available content in Greece mentioning that the Greek version of the service had 3,775 titles, with 1,116 TV series and 2,659 movies. The most controversial topic around the board is the relative

scarcity of local libraries on the platform compared to the abundance of U.S. programming (Lobato, 2019). Media executives were constantly comparing the Greek version of Netflix to the American in terms of both content and pricing (Farkonas, 2016a; Farkonas, 2016b; Fortune Greece, 2018, Farkonas, 2019). Chatziioannou, Oneman (2016), assumed that due to the limited content, part of the audience might, also, ignore Greek Netflix and continue watching via VPN connection.

One year after Netflix's launch in the Greek market, on January 2017, Farkonas, Athinorama, made an evaluation about the one-year presence of the service in Greece. Two of his focal points regarding the one-year comparison is that the available content in Greek Netflix was, still, limited, considering the American one, and that there were disappointing absences in new movies and series. According to Farkonas' evaluation, these two factors work as a restraint for the Greek audience to pay for such a subscription; the issue of the availability of only 35% of the entire list, in the Greek version, - as compared to the US - remains drawback. In addition to this, he mentions that this is a problem for all the countries in the world, which leaves the audience, in general, unsatisfied with Netflix's services. Specifically, he insists that many popular series were present but not in their latest season available, while the majority of the movies available were outdated (released a decade ago).

On December 12, 2017, Netflix announced that a truly localized service is now available for the Greek users (Netflix Media Center, 2017). The Athenian and Macedonian News Agency (2017), published an article under the title "Netflix is officially in Greece today" in which the details of the meeting between Greek journalists and Netflix's executives, Yann Lafarge and Yenia Zaba, were shared. The company's executives spoke about Netflix in Greece and the need for the expansion of the Greek library. They discussed about their plans to enrich the programming available with new series and movies.

In the re-evaluation for the fourth-year presence of Netflix in Greece, Farkonas, Athinorama, (2019) started his article with a disclaimer

as for the permanent complaint of almost all European countries, we decided not to include it in the evaluation; non-US countries will always have a much smaller list of movies and series than American Netflix. In large countries it may be close to 45% - 50%, in Greece the range is from 30% - 35% at its best. This is not something that is going to change, so we are evaluating the "Greek Netflix" (par. 3)

Overall, the reactions of the press have shown that the limited content is the biggest issue of the Greek Netflix as the difference is too big to ignore (Farkonas, 2016b), while media executives insist on the expansion of the Greek library in order to be fair in relation to

the prices paid.

Collaboration with local providers

As in most of the markets, Netflix's aim in Greece was to establish successful partnerships with the local internet service providers (ISPs) and telecommunications. However, these collaborations did not start at the same time as the launch of the service in the Greek market in 2016.

By the time Netflix began offering localized services in Greece on December 2017, Netflix's Media Relations Manager, Yenia Zaba, gave an interview to Akrivou, Fortune Greece, in which she was asked about the next moves in the Greek market. Asked about the discussions with Wind and Vodafone (telecoms) and the investment plan for 2018 in the Greek market, Yenia Zaba revealed to Fortune Greece that in the case of Wind, they are "very close to have an agreement". Such a collaboration definitely would strengthen Netflix's position in the Greek market. As for Vodafone, things there seemed to be less complicated, as the parent company is a global Netflix's partner and the fact that they have been working together for years has determined their partnership. "When we localize in a market, Vodafone follows", Yenia Zaba stated during the interview.

On April 2018, Wind Hellas telecommunications, together with the introduction of its pay-tv services, Wind Vision, announced the collaboration with Netflix, as the first provider in Greece that will include the service for its subscribers (To Vima, 2018). The article referred to Netflix as the "global" and "innovative" streaming platform that partners with Wind Vision offering a unique opportunity to the Greek audience, while they mentioned the incorporation of the Netflix button on the remote control for Wind Vision subscribers. "Our partnership with Netflix was a goal, for Wind Vision to be the best way to watch Netflix in Greece", said Hermann Riedl, Chief Business & Digital Transformation Officer at Wind at the launching event (To Vima, 2018). With Wind Vision's marketing campaigns, it was the first time that Netflix appeared in TV spot on Greek television (Figure 11). In addition to the traditional advertising of the new service, Wind launched the campaign *Kamia Erotisi* (Any questions?) and partnered with Greek celebrities (actors and singers) to promote the new service on their Instagram accounts.

The partnership with Wind, in 2018, was the most crucial move for Netflix to establish its presence in the Greek market, as Wind Vision directly connected its name with Netflix. Before its collaboration with Wind, Netflix did not undertake any particular marketing efforts in the Greek market, besides its presence on Greek social media.

Figure 11. Wind Vision’s TV spot in Greek television



Original productions in Greece

Four years have passed since Netflix’s arrival in the Greek market and despite the talk around Greek productions, it does not seem like the company is planning to invest in Greek originals soon. However, the promotion of such an investment can be encountered at the forefront of Netflix’s communication strategy on the market.

By the time Netflix started offering localized content to the Greek market, Yann Lafarge and Yenia Zaba, Netflix’s executives, revealed brand’s excitement to enter the Greek market, adding that Netflix will soon work with Greek producers to create series and films, which have global resonance (Amna, 2017). Asked by Amna (2017) whether they know the current Greek government’s initiatives to consolidate a more favorable framework for audiovisual production, they said they were aware of the government’s efforts to promote Greek producers, saying they were open to dialogue and collaboration, for the production of Greek successful series and films. Namely, they stated that for Netflix to invest and start productions in a new market, they expect from the audience to be mature enough to consume such a content. Netflix's Media Relations Manager, Yenia Zaba, also, talking to Maria Akrivou, Fortune Greece (2017), mentioned that “the importance of a market is clearly determined by its size but also by how mature the audience is”.

In 2019, representatives of major US entertainment studios, including Netflix, paid a visit to Greece, where they were informed about the country’s efforts to attract major foreign audiovisual productions (Kokkinidis, 2019). The visit was an initiative of Greece’s Ministry of Digital Policy, Telecommunications and Information and the National Center for

Audiovisual Media and Communication (EKOME) (Kokkinidis, 2019). Alexis Georgoulis, member of the European Parliament, insisted on the importance for EKOME to increase its budget in order to attract foreign productions (Kokkinidis, 2019). Moreover, in January 2020, the mayor of Athens, Kostas Bacoyannis, shared on his Facebook page a post about Netflix's first shootings in Greece. Additionally, he commented that the city of Athens welcomes international television producers (Newsbeast, 2020).

Such actions and announcements are truly important and meaningful for the market. In general, Netflix seems to acknowledge that local productions have a huge impact on how the world sees a market. National markets can use the cinemascope to portray themselves, show their culture and beauties to the world audience. Therefore, local productions in Greece might be more profitable for Netflix than any other marketing strategy applied in the market.

4.2.2. Greek market characteristics

As discussed in the theoretical framework, the characteristics of each local market have an important role on how Netflix is branding its services for the particular market. Furthermore, the market's traits show whether this market is capable to critically examine the effectiveness of the marketing practices applied by Netflix, but also show the internal reactions.

Netflix's impact on the Greek market

From the analysis, it has become evident that market's executives were discussing about Netflix's impact on the Greek media landscape. At first, they did not see Netflix as a measurable opponent to Greek pay-tv companies, since it is difficult to have such an effect on a market that traditionally engages, almost exclusively, with local content. They confront Netflix as an opportunity for evolution of the Greek audience and the market itself. By the time Netflix arrived in the market, Papathanassopoulos, Ta Nea (2016) argued that this new form of television (Netflix) was anticipated not only to replace traditional TV, but it was expected to provoke successive changes in the way the audience is watching television. He foresaw that channels would eventually be replaced by web applications, the remote controls would be less popular, and TV screens will belong to the traditional TV set. Interestingly, he admitted that this new reality would better respond to viewers' desires. Nevertheless, as he highlighted, the content would be the main reason to capture the audience's interest; "the most important reason for which viewers turn to either the TV screen or the computer or

tablet will always be the content”, (Papathanassopoulos, 2016). Another impact mentioned by Papathanassopoulos, Ta Nea (2016), was the potential changes within the local market as for example the rise of competition, that would derive from Netflix’s collaboration with local providers. Simultaneously, in 2016, Farkonas (Athinorama) introduces Netflix as “the platform that changed the scene” with its programming stating that “it is obvious why so many people have been waiting for so long for the official arrival of Netflix in Greece” (Farkonas, 2016a).

However, regarding the audience’s perceptions on Netflix’s services, at first, many had misunderstood the platform thinking that it is a pirated site that they could download anything they wanted (Chatziioannou, 2016). This might have been a result of poor branding of Netflix in the Greek market. When Netflix, first, arrived in Greece there were no social media marketing campaigns or traditional advertising on TV, or collaboration with local providers to promote the service. As already discussed, this has changed with the establishment of Netflix’s partnership with Wind in 2018. However, despite the rise of the competition with Netflix’s entrance in the market, Nova and Cosmote TV were, still, the leading platforms.

Later, in 2019, the market started talking about Netflix’s successful presence in the Greek market. Mandravelis, Kathimerini, (2019) on his article “Netflix is gaining ground in Greece”, mentioned subscribers estimates. As he stated, at the end of 2017, it was estimated that there were 34,000 subscribers, but now (2019) it is estimated that the number has tripled (Mandravelis, 2019). By 2020, it is estimated that Netflix subscribers will exceed 150,000, while the most optimistic estimate that there may be even more (Mandravelis, 2019). However, Netflix has not released any official subscribers’ number for the Greek market, so that we cannot practically review Netflix’s performance.

Pricing and taxation for TV content in Greece

Most of the media executives find Netflix’s prices “reasonable” and “low” in relation to the services they offer to the Greek market (Farkonas, 2019; Hoursanidi, 2018; Papathanassopoulos, 2016). However, they did, once again, share their thoughts on the availability of the content in relation to the price, where they agree that the movies and series in Greek Netflix are much less than the ones in the American Netflix, despite the fact that users are paying for the same packages. Fortune Greece (2018), published the article “Survey reveals: Greeks pay more for Netflix”, where the aforementioned issue is discussed. *Comparitech*’s study shows that Greek users pay up to 54% more for Netflix subscriptions

than US subscribers, taking into account not only the monthly fee but also the number of titles (Fortune Greece, 2018). The research has been conducted in 78 countries including Greece. According to *Comparitech*, the cost for each title is around 0.00211 euros, which shows that in the US, due to the larger number of content available, Netflix is significantly cheaper than in Greece (Fortune Greece, 2018).

On the other hand, Netflix's competitors are not satisfied with the EU regulations regarding the taxation applied to the local providers, when Netflix and Amazon Prime services are not included on these (Ta Nea, 2020). In this way, Netflix has the ability to maintain its low prices and gain more subscribers, whereas local providers are required to pay higher taxation, therefore, charge the users more.

Viewing habits of the Greek audience

Despite the fact that the Greek audience is traditionally engaged with local content and the traditional schedule of linear television, Greek executives argue that Netflix's arrival has changed the viewing habits of the viewers; Greek audience was looking for alternatives due to the chaotic environment of Turkish productions and outdated programs of the Greek conventional TV channels (Papazoglou, 2016).

Before Netflix became available in Greece, the audience was looking for ways to have access to the platform, often, using a VPN connection (Papazoglou, 2016; Chatziioannou, 2016). An interesting insight is that part of the Greek audience was already familiar with Netflix's original content and shows before Netflix's arrival. For the Athenian and Macedonian News Agency (2017), Netflix Originals, as *Bright* (2017), *House of Cards* (2013 – 2018), *Orange is the New Black* (2013 – 2018), and the *Crown* (2016 -) were among the most popular and anticipated shows for the Greek market, that the viewers have been already exposed to.

In 2018, Athens Voice released an article for Greeks' binge-watching habits. The author introduced the term to the audience and shared information about popular Netflix series that people start binge-watching. In 2019, the first official survey, on viewing habits and Netflix, took place in Greece. The series *Stranger Things* was voted as Greeks' favorite Netflix's shows. In the second place comes the TV series *La Casa de Papel* (2017 -) with 8% of the participants voting for the series. According to the research, television is the most popular medium for the Greek viewers to consume Netflix's content, with 44% said that they enjoyed their shows on TV, followed by laptops and desktops with 26% (Proto Thema, 2020). 22% of the Netflix's subscribers preferred mobile phones, as Netflix's iOS and

Android app enables them to download series and movies, in addition, to streaming, and watch them offline wherever they want (Proto Thema, 2020).

Network capacities and technologies in Greece

Taking into consideration that bandwidth limitations shape access to Netflix (Lobato, 2019), network capacities provided by telecommunications in Greece affect Netflix's presence in the market. In general, Greece is lower compared to other European countries, in terms of average available network capacity; it is about 20% to 25% lower than any other developed European country (Mandravelis, 2019). However, the country has similar performance to Portugal and France.

At the time Netflix made its appearance in the Greek market, Chatziioannou, Oneman, (2016) in his article under the title "Netflix & chill: Everything you need to know about the new service", provided useful information regarding the Internet connection that is required for Netflix's service to run. "Because the content is not downloaded to the platform, but streaming, the Internet connection needs to be good" is clearly stated by Chatziioannou. Interestingly, Chatziioannou (2016) acknowledges the peculiarities of the Greek market by saying that although telecommunications in Greece are capable of offering such speeds under certain circumstances, this is not the case for every city of Greece nor even everywhere in Athens. By stating this, the journalist recognized that despite the fact that Netflix's services were available in Greece in January 2016, the local market might not have the resources to support such a service in terms of network capacities provided.

In 2017, Farkonas, in his article introduced the term "VDSL technology" (Very high-speed digital subscriber line) discussing around the availability of 4K quality content provided by Netflix. Farkonas, Athinorama, (2017) argued that since Blu-ray discs were not yet available in stores by Greek providers, it is easy to assume that Netflix remained the only official source of 4K TV series and movies - in other words VDSL technology. According to the media expert's statements, only a small part of the Greek users had access to the aforementioned internet connection and could, therefore, enjoy the high definition services provided by Netflix.

As Mandravelis, Kathimerini, (2019) pointed out in his article, OTE, the biggest telecommunications provider in Greece, offers the largest network capacity for consumers to enjoy Netflix's services in Greece. According to the statistics given by the company, the bandwidth of OTE network for Netflix services in hours of high traffic averages 3.6 Mbps. Despite the partnership of Netflix with WIND Hellas, OTE is consistently at the top of the

Netflix ISP Speed Index rating (Mandravelis, 2019), as the only valuable network in Greece.

Greek executive's impressions

Greek media experts were more than willing to review Netflix's services and report their impressions for the awaiting audience. Specifically, in January 2016, Athinorama magazine organized "Athinorama Digital Netflix Week", when its team provided the audience with their impressions about Netflix's services and content, publishing articles every day for a week. At first, they introduced Netflix to the Greek audience with a brief overview of the platform. Then, the team focused on the easy-to-use techniques and the viewing experience Netflix provides to the viewers. They discussed about content and injustice in the Greek Netflix. And, finally, they shared their thoughts on whether it is worth paying for Netflix in Greece. Similarly, Chatziioannou, Oneman (2016), made a "test drive" of the Greek Netflix and provided his suggestions and recommendations.

Farkonas, Athinorama (2017; 2019), repeated the procedure the next year and 3 years later reviewing the progress of Netflix in Greece in order to provide feedback to the Greek audience. The Greek journalists claimed that the reason that they provide their opinion, for the audience to see, is because they support subscription services and they were long anticipating Netflix's arrival in Greece, so that they could make these reviews for the interested users. Their reviews mostly emphasized on practical issues, comparisons with other platforms, reviews on the series and movies and general issues encountered on the platform.

These reviews are meaningful for both the market and the brand. When Netflix entered the market, these articles were the only ones addressing the Greek audience providing information in the Greek language about Netflix and its services.

4.2.3. Competition for Netflix

This category has been created to showcase how Greek media executive present the competition for Netflix both in the local market and for brand Netflix internationally.

Local competitors

Netflix got off to a late start in Greece, arriving as part of its global expansion in January 2016. By the time, the streaming market was characterized by a duopoly with Cosmote TV and Nova being the leaders. Papathanassopoulos, Ta Nea, (2016), on his introductory article about Netflix's arrival in Greece, defined competition in the Greek

media industry intense, due to the rapid development of the telecommunications and the opportunities created in the market.

Papazoglou, Insider, (2016) in her article about the new platform in Greece stated that the truth is that the list of movies on Netflix is not as impressive as that of Cosmote TV or Nova; from the beginning the comparison between Netflix and the local competition was palpable. In 2017, in the context of Farkonas' evaluation in Athinorama magazine, the media expert comparing Netflix's content with Cosmote TV and Nova, respectively, mentioned that Cosmote TV or Nova subscribers will not find on Netflix the latest productions available. Furthermore, he suggested that users that do not mind about the subscription costs, can have both Cosmote TV or Nova and Netflix as a supplement service. Such a suggestion posed Netflix as a second alternative for the Greek viewer. Farkonas (2017) made clear that Netflix cannot satisfy the demanding Greek audience, that enjoys watching the latest productions with Greek subtitles. In 2019, on the latest Farkonas' evaluation in Athinorama, he still considered the comparison between Netflix and its local competitors to be the "grey zone" of his evaluation. By the time of his latest article (included in the dataset), Netflix offered fully localized services to the Greek audience. Elaborating on the services offered by the platforms, his conclusion is that it is difficult to persuade these viewers to pay extra for Netflix, unless they have spotted specific TV series (Farkonas, 2019)

On the other hand, in the same article Farkonas (2019) claims that the local providers do not always have interesting content that can draw the attention of the viewers. In this case, Netflix could work as a better choice for those looking for extraordinary content. Farkonas concludes that based on the current condition of the service, it is certain that a large percentage of the Greek audience that would choose Netflix, would feel that it is not fully satisfied by the platform in comparison to the established model "free TV + Nova" or "free TV + Cosmote TV". The best-case scenario, for Netflix aspirations for the Greek audience, is the subscription to one of the aforementioned local providers together with Netflix, but that may not be the case for the majority of Greek television viewers.

Overall, the established Greek subscription services and the access to free television services, that the Greek audience has, are keeping Netflix from becoming a competitive platform in the Greek market.

International competitors

Despite the fact that Netflix is, at the moment, the leading SVOD globally, the competition for the brand is fierce. When Netflix, first appeared in Europe, in 2012, it was a

solo player in the market. In this way, Netflix established its position by introducing a new form of entertainment, gained millions of followers and created original productions outside US. In 2020, Amazon Prime Video, Apple TV and, the new entry, Disney+ are Netflix's main international opponents. Greek executives discuss how competition shapes Netflix's character in each market and how it changes Netflix's strategies (Robolas, 2020).

Akrivou, Fortune Greece (2017), in her article, introduces Netflix as the platform with the millions of fanatic users that is even competing Hollywood itself. However, both Netflix's executives and Greek media, when it comes to Netflix's arrival in the Greek market they do not see international brands as the direct competition to Netflix, as the Greek audience is not that familiar with them (Papathanassopoulos, 2016) and the content they offer does not meet market's expectations either.

However, according to Robolas, Esquire (2020), Netflix faces competition, from both international and local competitors, which forces Netflix to change in order to better brand itself and succeed in a local market. Overall, success lies in the adaptability of each platform in the local market in order to satisfy the demanding audience (Robolas, 2020).

4.2.4. Netflix's action plan

This category includes content related to Netflix executives' opinions about both the Greek market but, also, Netflix's plans shared on the Greek press.

Investments in the local market

There are different ways for Netflix to invest in a local market. Translation into a national language is a practical "vote of confidence", as it requires significant funds, while giving opportunities to local companies, whose main activity is translation (Akrivou, 2017). Netflix co-operates with translation companies in each country and occasionally assigns projects to more than one domestic companies.

Regarding the Greek market, Netflix's plan for 2018, was that part of the investing budget would also concern Greece. At the time, up to 70% of the content was translated in the Greek language; the goals were to reach up to 100% and close agreements with telecommunications providers and ISP's.

In 2018, by the time Netflix signed its partnership with Wind telecommunications, Rene Rummel, Netflix's Business Development Director EMEA, shared their excitement in the Greek media (To Vima, 2018). Netflix's acknowledges that such a partnership with a local telecommunications provider would strengthen its brand on the market, as Netflix

continues to be unpopular with a great part of the audience that is engaged with traditional media. However, besides Netflix's collaboration with local agencies and local providers, the company has not undertaken any other particular local marketing efforts.

Looking for Originality and Variety

Equally important is the issue of local content production and, of course, its availability in other international markets (Akrivou, 2017). There are specific requirements for Netflix to invest in original programming in a foreign market. Netflix is interested in stories from around the world that resonate the audience; Netflix is looking for originality and variety coming from the local market. Especially for the Greek market, Netflix started discussing with local content creators and producers since they entered the market (Akrivou, 2017). Netflix seems to be investing in variety; series like the Israeli *Fauda* and the Spanish record-breaking *La Casa de Papel* are the proof (Robolas, 2020).

As discussed by Zaba (Fortune Greece, 2017), Netflix is willing to bear the costs of a valuable proposal as long it has global dimensions and the potential to captivate the world audience. However, until 2020, it looks like there are not interesting original proposals from Greece yet, that would make Netflix contribute and invest in.

4.2.5. Netflix Originals

Netflix has changed the landscape of the television business, introducing its original programming. Netflix's first original series, the *House of Cards*, has been a milestone for Netflix's success story. Greek executives seemed to acknowledge the importance of the production for the successful evolution of Netflix in the years to come. Immense attention was given on how Netflix decided to go a step further and invest in original programming. In the interview given to Akrivou, Fortune Greece, (2017), Netflix's Zaba admits (for the *House of Cards*) that it was a great lesson for everyone because the strategy was based on the audience's demands. Netflix's strategy, which is translated by the ability to react immediately, and the flexibility to adapt to the new reality, is highlighted by the Greek journalist, as a successful example that can be employed in the Greek market, as well. Greek media executives acknowledge that investing in original programming was a very expensive and risky bet for Netflix, but they do applaud this decision. Therefore, Farkonas, Athinorama, (2016), refers to the series as the "famous" *House of Cards*, Netflix's first original production, that became the first exclusively web distributed series to win an Emmy Award. The Athenian and Macedonian News Agency (Amna) (2017) focuses on the high ratings that the series has garnered internationally. The continuous references on *House of*

Cards series, by the press, indicates its importance in respect of Netflix's evolution

To continue, for Netflix, its content is one of its biggest assets; the company is branding itself with its signature series and movies. However, at first, they (Netflix) did not believe that the company would become the global brand that eventually became and that would have such an impact on the entertainment industry (Akrivou, 2017). What few may know is that, at the time, Netflix's founder did not think it was the right move to invest in content production. He did not want to take over the production of *House of Cards* until the director persuaded him to give it a try (Akrivou, 2017). Gradually Netflix keeps investing on its content in order to improve the experience users are having (Farkonas, 2016b). For 2018, Netflix's goal was to invest \$7-8 billion on original productions (movies, series, documentaries) (Amna, 2017; Akrivou, 2017). Netflix's investments for content are depicted by international collaborations with producers from all around the world in order to provide its subscribers with the highest quality of original content.

Netflix Originals are the brand's major assets that differentiate the platform in a highly competitive environment. Therefore, Netflix strategically promotes its investments on original programming, and the content itself, by which is mainly identified by the Greek audience.

4.2.6. Binge-watching

Binge-watching has become a marketing paradigm that determines how Netflix content could be consumed, demonstrated by influential figures in the film industry (Jenner, 2018). Binge-watching might be the most-closely-linked-to-Netflix term, since it was the platform that established the binge model, through the releasing of all episodes of a series' season at once (Jenner, 2018). Today, the concept of binge-watching is associated to the pop culture through the Netflix experience.

Netflix and Binge

As Farkonas (2016a) argues, series' marathons started with Netflix original TV series. According to the Greek media expert, through its original productions, Netflix, has changed the way we have been watching television for decades, e.g. its TV series. Offering all episodes of a season at once, Netflix not only made the famous binge-watching possible but also made radical changes in the script, structure, and flow of the tv series.

As mentioned by Chatziioannou (2016), the term "Netflix and Chill" started being popular among the young adults creating cultural relevance. Explaining the phrase, the

journalist proposed to picture Netflix as the ideal way to relax at home, just binge-watching one of the many series available. The binge model started being promoted in the Greek market as an innovative technique that changed the way viewers consume TV content, but also, as a fun and cool option to just relax and watch television at home.

In early 2018, Athens Voice, free press, released an article under the title “What do you know about binge-watching?” At first, it introduced the theme “Netflix and Binge”, claiming that binge-watching is the “most popular way” to consume TV content. Then, it was clearly defined that binge-watching is for series and the author enriched the article with interesting facts about binge-watching and viewing habits of Netflix’s users e.g. the Netflix series that the Greek audience has chosen to start binge-watching.

Netflix itself supports binge-watching, through the promotion of its series. Evi Hoursanidi, Account Manager Pitch PR - Netflix Greece, in her article “What makes foreign series so addictive?”, on Esquire magazine (2018), discusses the new television habits that Netflix has created on the market. The term “binge-watching” is, again, at the forefront of the new trends in the television industry. Hoursanidi, Esquire (2018), characterizes Netflix TV content “addictive”, which, also, indicates the emotional engagement of the viewers. Elaborating on this, she mentioned that despite the obvious reasons, which make viewers get addicted to Netflix (low prices, cinematic experience etc.), there are latent causes as well. As she suggests, the simple interpretation is technical; not only Netflix makes the whole season available in one day, but, the “next episode” button is automatically activated at the end of every episode, so Netflix even “subcutaneous” impels users to binge. However, she argues that such a habit does not result in viewers wasting their time on TV but creating a viewing ritual. Moving one step further on explaining this ritual, she explains that viewers develop strong emotional bonds with the heroes while discovering the true stories of the characters “...admittedly we don't often meet TV characters like Eleven in Stranger Things or Pablo Escobar in Narcos...” (Hoursanidi, 2018).

Finally, on the one hand, Greek executives emphasized on the quality content provided by Netflix like documentaries (*The Last Dance*, *Wild Wild Country*), award-winning shows (*House of Cards*, *Orange is the New Black*), iconic series (*Mad Men*), and blockbusters from Marvel (Farkonas, 2016a; Papazoglou, 2016; Akrivou, 2017; Robolas, 2020). They focused on the quality provided and the worth watching content, the majority of which Netflix Originals and series. However, there are controversies on the articles regarding quality tv provided by Netflix. According to Robolas, Esquire (2020) Netflix might show masterpieces like *Uncut Gems* and the French animation titled *I Lost my Body*,

while maintaining the low-quality comedies of Adam Sandler and enriching its programming with the “unacceptable” reality show *Too Hot to Handle* in order to keep the audience entertained, while the binge.

4.2.7. Technology and Operations

Netflix is using technology to provide users with a unique experience that is incomparable. But how do they make it happen? The first big step towards Netflix’s establishment in home entertainment, came with Netflix’s innovative business choice; a monthly, low subscription for as many movies as anyone wants, without restrictions (Farkonas, 2016a).

How Netflix is using technology

Netflix is highly investing in the most innovative technologies in order to offer its subscribers an incomparable experience. Since Netflix’s arrival on the Greek market, the media paid great attention to the technological strategies used by the brand. Netflix’s rationale is to reinvest the money the company makes in content and technology (Akrivou, 2017). As for 2018, Netflix invested more than \$1.5 billion in the technological advances of the platform (Amna, 2017; Akrivou, 2017).

Company’s goal is using the appropriate algorithms and technological innovations for their subscribers to enjoy series and movies in 4K quality, 3D or HDR format on their smart TV, mobiles or laptops, anytime (Amna, 2017). In addition to this, the fact that Netflix being the first streaming platform to offer high quality image and sound technologies in the market, made clear that the brand is pursuing high standards for its users (Farkonas, 2016b). The quality of image that Netflix provides its subscribers cannot be replaced or compared to other pirated sites that illegally offer its content. In this way, Netflix aims to demanding viewers who would not risk watching their favorite Netflix shows in low quality, therefore, piracy might be prevented. This is an important element for Netflix’s presence in the Greek market, as it is estimated that there are 80,000 to 100,000 piracy-enabling devices in Greek households, allowing users to have access Pay-TV channels for free (Mandravelis, 2017).

Overall, the combination of the innovative, for the Greek market, techniques, made the service even more attractive for the Greek viewers, who were curious to see what Netflix has to offer.

Summary

The core of Netflix’s branding strategy in the Greek market is found in the Hellenization of

its programming in the most effective way. However, the platform does not, always, manage to meet the expectations of the audience due to certain limitations in the Greek library (in both subtitling services and content) and the failure to effectively position its presence in the market as a streaming service. Another obstacle, that Netflix has to overcome, is the peculiarities related to the network capacities of such a small market and the little familiarization of the audience with the ‘pay-TV culture’.

Taking into consideration the above, the local market perceives Netflix as an indirect competitor that cannot beat the Greek providers. Market’s executives would recommend it to a large percentage of the Greek audience as a supplement service to local pay-TV providers and free television. The inevitable next question is whether and to what extent Netflix can operate as the leading source of home entertainment for the Greek viewers. In this case, the answer is much more difficult and cannot apply to all viewers’ desires, despite the company’s great investments in original content and AI-powered technologies.

5. Conclusion

Started out as a DVD mail-order sales service, Netflix has evolved into one of the most popular video streaming platforms in the world, providing entertainment to millions of viewers. In terms of branding, global brand Netflix, follows a successful branding model that has helped the company grow dynamically and establish its presence in over 190 countries around the globe. Netflix's impeccable marketing strategies are strategically focused on creating value while spending less on advertising. Netflix is extremely popular not only as a streaming service, but also for its social media branding strategy. Indeed, the popularity of its social media platforms certainly contribute to the popularity of its services, keeping audiences constantly engaged and forced (Chamat, 2019). Netflix's successful branding and marketing tactics sparked the interest in how the brand is dealing with different local cultures when it enters foreign markets and brands its services. Based on this specific interest, this thesis explored Netflix's presence in the Greek market through the analysis of Instagram posts on Netflix's Greek account and articles from the Greek press, aiming to answer the research question how Netflix is branding its services for the Greek market.

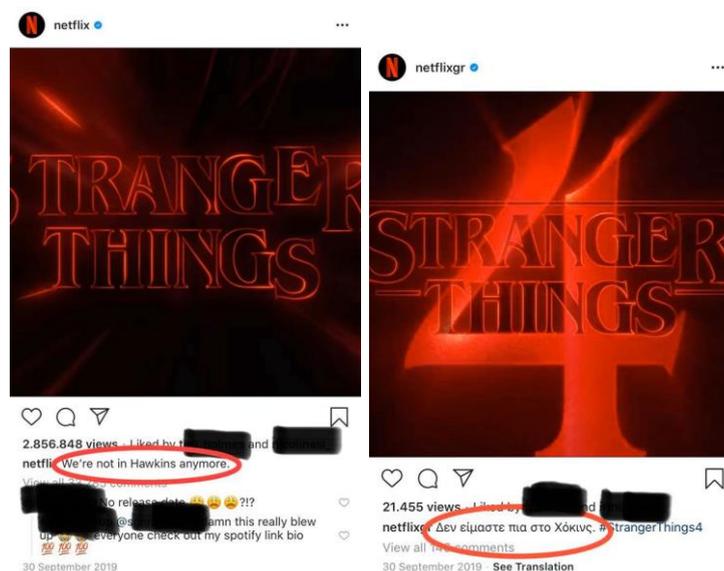
5.1. Answer to the research question

The findings obtained by the research on Netflix's case in the Greek market revealed valuable insights on the branding strategies used by the brand, but also how the market's executives counter Netflix's presence. Based on the observations and interpretation of the analysis, the heart of Netflix's attempts, to brand its services for the Greek market, is found in the strategy of localization. Netflix invests in the strategy of localization in various ways. At first, one of the initial steps was the Hellenization of Netflix's services for the Greek market, which means offering translated and dubbed content, Greek-language interface, and compatibility of the payments for the Greek audience. When Netflix entered the market, it failed to provide localized services for the Greek audience, which triggered negative reactions by the media executives. However, two years have passed until Netflix started offering the expected localized experience to the market. Netflix collaborated with the Greek agency *Corn Studio* to facilitate the process of translation and dubbing of its content. Moreover, in 2017, they assigned to the Greek social media agency *Redirect* the management of the brand's Greek social media accounts. In addition to the lack of localized content, in the first two years of Netflix's presence in the market, the library of series and movies was extremely limited which was a major point of dissatisfaction for the audience. Lastly, despite the efforts of the former Greek government (SYRIZA), Netflix is

not planning to have Greek productions soon. However, Netflix highly invests in promoting its plans to collaborate with local producers and content creators in Greece, while keeping these plans on hold for more than four years.

Regarding Netflix on Instagram, the analysis has shown that Netflix utilizes Instagram as a tool to integrate their branding strategy in the Greek market. Netflix uses a simple approach to post, with most of the posts not featuring the brand name written at all. Netflix's branding efforts on Greek Instagram is characterized by a combination of global consumer culture positioning (GCCP) and local consumer culture positioning (LCCP) (Gao et al., 2018). The notion of GCCP is displayed by the fact that the movies and series' posters have no compatibility with the Greek culture as they are similar to those posted on the initial media source, Netflix US Instagram account (Figure 11). This lack of adaptability of the posted content indicates the model of global branding strategy followed by Netflix, which identifies its brand identity as a single and uniform presence. Therefore, this uniform presence is used to share content on Instagram for promotional purposes, rather than to tailor this content to local cultural characteristics (Gao et al., 2018; Martín-Quevedo et al., 2019).

Figure 12. Stranger Things trailer from the Netflix US and Netflix Greek Instagram accounts



In addition, Netflix creates global cultural relevance through the promotion of its binge model. Netflix has become part of our everyday life in a way that influences the way people talk, behave, and how they watch television. Specifically, the euphemism *Netflix and Chill* which is translated by the researcher as *Netflix and Binge* describes the habit of staying home and watch TV series undisturbedly. Netflix is creating cultural relevance through the promotion of its series. However, this cultural relevance is not adapted to the Greek local

market rather it indicates a global culture of Netflix's viewers.

Regarding the local consumer culture positioning, localized elements are observed, as well, on Netflix Greece Instagram account. To begin with, all the written captions of the posts are in the Greek language and the videos carry Greek subtitles. Moreover, to effectively localize its content on Instagram, Netflix is trying to find references that are familiar, with the Greek audience, but also retain the same meaning. To do this, significant cultural and historical understanding of the market is a requirement (Farris, 2018). The most elements of localization are found on the memes shared on the account, which are tailored and adapted to the Greek reality. The memes are mostly depicting occasions such as Holidays, local events or just occasions of everyday life in Greece. In this way, the brand shows respect for the cultural values of the local population, acknowledging the holidays and special occasions of the particular country.

Furthermore, the findings indicate that Netflix's Instagram posts' center is around upcoming movies and TV shows, and the platform has emerged as a key channel for posting extra content, such as behind-the-scenes, on-the-making sneak peeks and photoshootings. Indeed, with 88% (n=276) of the overall posts carrying elements of Netflix's content on them, it is safe to assume that the main purposes for which the brand is using the platform are both promotional and informational. In addition to this, the most promoted shows are Netflix's flagship content, with 64% (n=202) of the posts shared, referring to Netflix's Originals TV shows and movies. Moreover, in order to strengthen its promotional purposes, Netflix is evoking positive feelings, as humor and nostalgia, through the posts and messages shared on Instagram Greece. This tends to have a powerful influence on the audience and illustrates the possibility that less apparent marketing techniques may be more effective (Martín-Quevedo et al., 2019).

Accordingly, informational and promotional content is, also, found on Greek media articles depicting the executives' attempts to introduce Netflix to the audience. When Netflix first entered the Greek market in 2016, the Greek audience was not that familiar with the platform yet. Therefore, it was imperative for the media executives, that initiated the discussion around Netflix, to introduce the new service to the market. In the media articles, there was mainly informational content about Netflix's services such as the pricing and easy-to-use techniques, whereas on Instagram the content shared had to do only with Netflix's shows. Nevertheless, for the press to better showcase Netflix's library there were various references to Netflix's original productions like the *House of Cards*, that the audience was already familiar with. This observation responses to Jenner's (2018) statement regarding

Netflix's predominately marketing of its original content. Finally, regarding the promotional content for Netflix's services, an element that is highly promoted by the Greek media executives is the flexibility provided with the use of innovative technologies. Netflix's contribution to the development of today's TV content cannot be underestimated; the ability to watch thousands of different movies and series without advertisements, at a low price, and without restrictions, is a commercial proposition, from which there is no way back (Farkonas, 2016a).

Overall, demonstration of sensitivity and responsiveness, and local knowledge are major requirements for Netflix to successfully brand its services in national markets (Breenan, 2018). The further development of Netflix in Greece will depend on the right moves of the company in terms of marketing, such as the decision to establish more partnerships with local providers that use traditional advertising; since it cannot beat them, Netflix should collaborate with them. This is because the Greek broadcasting market is small, and it would hardly sustain competing digital platforms without traditional marketing.

5.2. Scientific and social implications

The scientific importance of this thesis lies in the better understanding and exploration of the previous research about global brand Netflix in relation to the case of Netflix in Greece. Together with the previous theory, the research provides new insights on unaddressed issues regarding branding strategies on Instagram in small markets. Moreover, the study provides insights about the presence of the media giant and the reactions evoked in the market, through the exploration and application of the theoretical framework proposed.

Regarding the social implications, Netflix's entrance in the Greek market has been dynamic, innovative, and disruptive, as the brand is constantly changing the way people consuming TV content, creating more competition for the local providers. As already discussed, Netflix is applying different marketing strategies on the Greek market compared to its local opponents, which have already established their brand through the years. Besides, the collaboration with Wind Hellas local provider, Netflix invests more on its social media presence to brand its services for the Greek market, rather engaging with traditional advertising. The purpose of branding is to establish a strong connection between a company and its targeted audience. However, the reach of Netflix's branding strategies applied is disputable, as the target audience it is not clearly defined.

As stated by Martín-Quevedo et al. (2019), Netflix pursues distinct global approaches on Instagram, adapted to some point to the cultural differences of the country in

question. However, for such a giant media brand, carrying a global identity complicates its adaptation to the local market. The above indicates the commercial issues the brand is facing when entering diverse markets (Lobato, 2019). Overall, the question that arose by the Greek media executives is whether Netflix can be an alternative to free TV channels, at a time when it competes with other subscription services, established for many years and with a more Greek-oriented character. As for Netflix's presence in Greece, so far, the researcher strongly doubts that, unless the brand decides to responsibly address the issue of local Greek productions, in order to be a valuable opponent towards the local providers.

5.3. Limitations and suggestions for future research

This thesis is exploratory in nature, as analyzing branding strategies, applied by Netflix in foreign markets, needs further research as the social media strategies and markets mature. While the findings may apply to markets of similar size, they cannot be generalized as each market is unique, in terms of cultural, sociopolitical, and economic development.

The above indicate some limitations for this thesis, mainly associated to the research method. The first limitation has to do with the representativeness of the case and the sample used in this research; despite the fact this study includes a sample of 307 Instagram posts and 20 media articles from the Greek press, it remains limited. The aforementioned sample provides little evidence for generalization on a scientific level. The second limitation has to do with the nature of the social media platform; as Instagram is constantly changing creating new opportunities and challenges for the brands, any additional deeper research on Instagram branding would be helpful for further research. Finally, the researcher plays a crucial role in the analysis, which means biased interpretation may alter the results. Since this study is conducted by one researcher, personal knowledge and experience influence the observations and conclusions, consequently, a second coder would provide valuable insights to the procedure.

Accordingly, there are numerous suggestions for future research, as this current study shed some light on existing gaps that need further exploration. Future research on Netflix's branding strategies should look at the brand's total social media presence beyond Instagram. By studying and observing the strategies applied in multiple social media platforms, such as Facebook and Twitter, future researchers may provide more evidence about Netflix's branding tactics in the Greek market and therefore draw a stronger conclusion. This choice would make the data of the sample more diversified and more adequate. Moreover, future research on social media should focus more on social media branding in local markets, as

there are few academic articles available to support the arguments of this study.

Finally, as part of this research was to examine the reactions of the Greek market's executives regarding Netflix's presence in Greece based on the analysis of media articles, it would be helpful and interesting to conduct interviews with branding experts. Therefore, further research should emphasize more on how the market's executives deal with Netflix's presence in the local market.

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Appendix A

Media Articles

N°	Title	Date	Source	Author (if applicable)
				Stelios
1	To Netflix και ο αντίκτυπός του [<i>Netflix and its impact</i>]	February 16, 2016	Ta Nea (available at medianalysis.net)	Papathanassopoulos Professor of Media Organization and Policy at University of Athens
2	Στην Ελλάδα επισήμως από σήμερα το Netflix [<i>Netflix is officially in Greece today</i>]	December 12, 2017	amna.gr	-
3	Ο πόλεμος των φόρων [<i>The war of the taxes</i>]	January 13, 2020	tanea.gr	-
4	Κερδίζουν έδαφος στην Ελλάδα οι υπηρεσίες της συνδρομητικής Netflix [<i>Netflix subscription services are gaining ground in Greece</i>]	January 19, 2019	kathimerini.gr	Vaggelis Mandravelis Business Journalist
5	Netflix: τί είναι, τί προσφέρει, γιατί σ' ενδιαφέρει [<i>Netflix: What is it, why is it worth your attention</i>]	February 8, 2016	athinorama.gr	Kostas Farkonas Journalist (specialization in streaming platforms and technology)

6	Netflix, Amazon, Disney and Universal Representatives Explore Production in Greece	May 17, 2019	greece.greekreporter.com	Tasos Kokkinidis Journalist
7	This is what Greeks watch on Netflix	January 20, 2020	en.protothema.gr	-
8	Στενότερη συνεργασία με Netflix, περισσότερες καινοτομίες για τη WIND VISION [<i>Partnership with Netflix, more innovative steps for WIND VISION</i>]	September 9, 2018	tovima.gr	-
9	Netflix στην Ελλάδα, έτος 4ο: αξίζει για όλους ή όχι; [<i>Fourth year for Netflix in Greece: Is it worth it for all or not?</i>]	February 1, 2019	athinorama.gr	Kostas Farkonas Journalist (specialization in streaming platforms and technology)
10	Netflix, έναν χρόνο μετά: μήπως τώρα αξίζει; [<i>Netflix, a year later: is it worth it now?</i>]	January 24, 2017	athinorama.gr	Kostas Farkonas Journalist (specialization in streaming platforms and technology)
11	Netflix & chill: Όσα πρέπει να ξέρεις για την νέα υπηρεσία [<i>Netflix & chill: Everything you need to know about the new service</i>]	January 7, 2016	oneman.gr	Christos Chatziioannou Media Journalist
12	Netflix: ο αποκλεισμός περιεχομένου και η αδικία [<i>Netflix: content blocking and injustice</i>]	February 11, 2016	athinorama.gr	Kostas Farkonas Journalist (specialization in streaming platforms)

					and technology)
13	Το Netflix γυρίζει σελίδα και αλλάζει πρόσωπο [<i>Netflix moves to the next level and changes</i>]	April 27, 2020	esquire.com		Giorgos Rompolas Media Journalist
14	Τι κάνει τις ξένες σειρές τόσο εθιστικές; [<i>What makes foreign series so addictive?</i>]	June 17, 2018	esquire.com		Evi Hoursanidi Account Manager Pitch PR - Netflix Greece
15	Εσύ ξέρεις τι είναι το binge watching; [<i>What do you know about binge-watching?</i>]	February 24, 2018	athensvoice.gr		-
16	Οι 30αρηδες που μαθαίνουν στο Netflix ελληνικά [<i>The 30-somethings who learn Netflix how to speak Greek</i>]	April 28, 2019	ethnos.gr		Eri Panselina Data Journalist
17	Τι ψάχνει η Netflix στην Ελλάδα: Οι παραγωγές, η συνεργασία με μεγάλες εταιρίες και οι επενδύσεις [<i>What Netflix is looking for in Greece: Productions, collaboration with big companies and investments</i>]	December 13, 2017	fortunegreece.com		Maria Akrivou Media Journalist
18	Netflix στην Ελλάδα: 10 απαντήσεις σε βασικά ερωτήματα [<i>Netflix in Greece: answers to 10 key questions</i>]	January 9, 2016	insider.gr		Niki Papazoglou Media Journalist
19	Netflix: οι πρακτικές μας				Kostas Farkonas

εντυπώσεις [<i>Netflix: our practical impressions</i>]	February 9, 2016	athinorama.gr	Journalist (specialization in streaming platforms and technology)
20 Έρευνα αποκαλύπτει: Πιο ακριβά πληρώνουν οι Έλληνες το Netflix [<i>Survey reveals: Greeks pay more for Netflix</i>]	December 3, 2018	fortunegreece.com	-

Appendix B

Coding Frame for the media articles

Selective Code	Axial Code	Examples of Open Codes
Localization	Hellenization of the services	<i>Netflix is gaining ground in Greece, subtitling, dubbing, adaptation to Greek reality, collaboration with Greek companies to facilitate the operations of localization (translation, graphic designers), Corn studio → Greek logos of the series, Netflix made its services easy-to-use so that audience prefers the legal and safe way to have access Disadvantages: failed to provide localized experience from the beginning → Greek subtitles were available almost 2 years after Netflix's arrival in the market</i>
	Productions in Greece	<i>abolishing the borders, potential of proposals from Greek producers, discussions with content creators and directors</i>
	Need for expansion of the Greek library	<i>availability of content, limited access to</i>

		<p><i>Original content, Greek Netflix Vs American Netflix, content blocking and injustice</i></p>
	Collaboration with local providers	<p><i>WIND Hellas → official partner, Vodafone will follow → parent company is a global partner</i></p>
Netflix Originals	<p>“House of Cards” as a milestone for Netflix’s success story</p>	<p><i>numerous mentions on series’ success, binge-watching started with “House of Cards”” 13 episodes</i></p>
	Great investments on content	<p><i>Originals: the biggest goal of the company, House of Cards, Narcos, Orange is the New Black, La Casa de Papel, Dark</i></p> <p><i>Iconic series from other networks: Mad Men</i></p> <p><i>Original Documentaries: Wild wild world</i></p> <p><i>Blockbusters: Marvel Cinematic Universe</i></p>
Binge-Watching	Netflix and Binge	<p><i>definition of the term “binge”, identifying characteristic of Netflix, completion of a season within 7 seven days, uninterrupted experience without advertising, home entertainment interesting facts about binge-watching</i></p> <p><i>most popular day for binge-watching is Sunday, Netflix & Chill resulted in binge-watching, nights at home, release all season’s episodes at once</i></p>
Greek Market Characteristics	<p>Pricing and taxation for TV content in Greece</p>	<p><i>regulations, Netflix’s services more expensive in Greece,</i></p>
	Viewing habits of the Greek audience	<p><i>television usage, Internet usage, VPN use, what Greeks watch, series that Greek users started binge-watching</i></p>
	Netflix’s impact on Greek market	<p><i>arrival of (such a giant company) Netflix in</i></p>

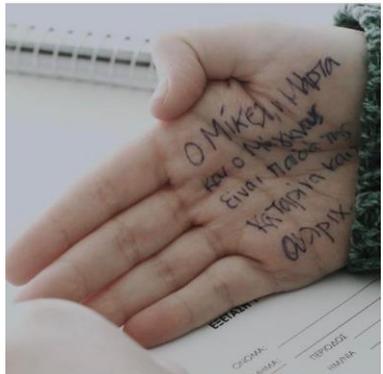
		<p><i>Greece, changes on viewing behavior of the audience, replacement of the traditional receiver (Internet Vs TV), policy debates provoked, initiatives by the Greek Government for potential Greek productions (Alexis Georgoulis), audience confuses Netflix with other pirate sites</i></p>
	Network capacities and technologies in Greece	<p><i>Internet speed in Greece, developments on the field of media and communications, network capacities provided by the providers</i></p>
	Market executives' impressions	<p><i>practical impressions, Athinorama Digital Netflix Week, comparison to other platforms, review on the provided content, issues with the platform</i></p>
Netflix's action plan	Looking for Originality	<p><i>potential proposals from Greek producers, find young creators with artistic Vision</i></p>
	Investments in the local market	<p><i>visits in Greece, potential agreement with telecommunications that do not have TV services yet → become competitive</i></p>
Competition for Netflix	Local competitors	<p><i>Cosmote TV (telecommunications), Nova Internet television enters dynamically in Greece, Intense competition, Netflix as an alternative, better quality, bigger library, latest productions</i> <i>Cinobo → Greek cinephiles</i></p>
	International competitors	<p><i>Netflix put millions of users in the game of the SVODs with its competitive prices and packages, competition shapes the new branding strategies of Netflix, aggressive strategies, Netflix no longer plays on its</i></p>

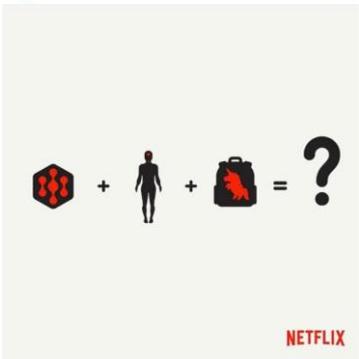
		<i>own without opponents, Disney+, Amazon Prime (Jeff Bezos), MUBI</i>
Informational content	General Information about Netflix	<i>introduction to Netflix, evolution from rental company to content producer, the way it changed people consume TV entertainment, Netflix expansion on 2016 Netflix's history, number of subscribers</i>
	Informational content about the subscriptions	<i>How-to: account creation, subscriptions, quality of image, free one-month trial, pricing, upgrade, cancellation, account sharing</i>
	Easy-to-use techniques	<i>Reviews on: visual effects, testing devices, technical capabilities, environment, usability, Internet connection, HD quality</i>
	Informational content about the programmes	<i>series, movies, content for children, how to start, what to watch, recommendations, reviews, agreement with local providers</i>
Technology and	How Netflix is using technology	<i>high quality of services, personalized interface, monitoring, proposals,</i>

operations		<i>recommendation algorithm, flexibility</i>
Promotional Content	Promotional content for Netflix' services	<i>quality, convenience, easy registration and payment, free-trial month, versatility, traditional TV logic</i>
	Promotional content for Netflix's content	<i>worth-paying-for content, awesome work on the Originals, House of Cards, Narcos, Making a Murder, Dark Quality award -winning content → The Irishman, Roma I lost my body, The Last dance</i>

Appendix C

Coding frame for the Instagram posts

Category	Brand Name	Type of post	Emotion	Type of promoted Netflix content	Explanation	Example
Localization	Hashtag #NetflixGR	Meme	Humor	Netflix original series	Reference to Greek Universities exams period (that takes place every September, June, and February) with the hashtag #exetastiki	 <p>netflixgr • 324 likes</p> <p>netflixgr Αν δίνουμε το #DARK στην εξεταστική, το 10άρι το 'χα για πλάκα. #NetflixGR #exetastiki</p> <p>View all 6 comments</p> <p>tinaklf Κι εγώ</p> <p>netflixgr @t.i.n.a.k. 🤪</p> <p>7 February 2018 · See Translation</p>

<p>Binge-watching</p>		<p>Meme</p>	<p>Humor</p>		<p>Netflix “is repeatedly calling” to remind the user to continue watching</p>	 <p>netflixgr</p> <p>Liked by [redacted] and 2.766 others</p> <p>netflixgr 8 αναπάντητες ήση</p> <p>View all 21 comments</p> <p>13 October 2018 · See Translation</p>
	<p>Netflix’s Logo</p>	<p>Puzzle</p>		<p>Netflix original series</p>	<p>Post that encourages interaction with the users</p>	 <p>netflixgr</p> <p>200 likes</p> <p>netflixgr Όταν κοιτάς τα μάτια μου, ποιον βλέπεις;</p> <p>View all 4 comments</p> <p>23 February 2018 · See Translation</p>
<p>Localization</p>	<p>Hashtag #NetflixGR #Netflixart</p>	<p>User-generated content</p>		<p>Netflix original series</p>	<p><i>La Casa de Papel</i> sketch by Greek tattoo artist</p>	 <p>netflixgr</p> <p>Liked by [redacted] and 4.114 others</p> <p>netflixgr Bella Ciao!</p> <p>@g_baker_saketattoocrew</p> <p>#moneyheist #LaCasaDePapel #netflixart #netflixgr</p> <p>View all 38 comments</p> <p>10 July 2018</p>

<p>Localization</p>		<p>Meme</p>	<p>Humor</p>		<p>Reference to the Greek islands with the hashtag #cyclades</p>	
		<p>Repost</p>	<p>Nostalgia</p>	<p>Series</p>	<p>Repost of Jennifer Anniston's first Instagram post related to <i>Friends</i> series</p>	
<p>Informational content</p>	<p>Hashtag #NetflixGR</p>	<p>Photo</p>			<p>Informational post for the releases of the month</p>	

<p>Promotional content</p>		<p>Carousel of photos</p>	<p>Nostalgia</p>	<p>Movie</p>	<p>Promotional post for Jennifer Aniston's upcoming moving with references to <i>Friends</i> series</p>	
<p>Binge-watching/ Informational content</p>	<p>Hashtag #NetflixGR</p>	<p>Photo</p>		<p>Netflix original series</p>	<p>Informational post about the series referring that "all episodes of the season available today"</p>	