

Going Dutch

Localization Strategies for Netflix's Brand in the Netherlands

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ABSTRACT

Digitalization and media convergence have changed media landscapes. Global media brands such as Netflix emerged in the global market, with multiple local brands. These local brands incorporate localization strategies to fulfill audience-specific needs. Netflix has expanded its service to numerous countries, and research on these local Netflix brands is relevant for a more complete understanding on how global brands take form locally. Netflix Netherlands, however, has not been researched regarding its branding and localization strategies yet. Since Netflix has based its EMEA headquarters in Amsterdam and Netflix leads the Dutch media market, this country's Netflix brand deserves academical attention. This thesis serves to answer the following research question: How does Netflix's brand in the Netherlands compare to its global US-based brand? To find an answer to this question, this thesis used a thematic content analysis with a grounded theory approach. The collected data included online and publicly available statements, interviews, news articles, explanation videos, and advertisements by Netflix NL or official Netflix representatives. This thesis performed initial and focused coding on the most relevant data items. This coding process existed of systematically categorizing relevant units of analysis within the data items into an initial and final coding frame. The results included seven main themes: content, innovation, relation to other entertainment forms, localization activities, performance, competition, and Netflix in social life. Analysis of these themes revealed that Netflix NL uses three relevant branding strategies: a portal-as-brand strategy, portal-as-content strategy, and producer-as-brand strategy. The main difference with Netflix's global brand was the focus on content in its branding strategies. Unlike Netflix US, Netflix NL has used this content strategy since it entered the Dutch market and adapted it to circumstances in this environment. The Dutch brand used content to attract new subscribers in its early years, and eventually aligned this with the producer-as-brand strategy to market its competitive advantage. Even though Netflix's Dutch brand is somewhat similar to the global brand, Netflix NL has grown to be a stable individual brand with a global attitude itself. This topic requires further research in the future as both brands and their contexts keep evolving.

KEYWORDS: *Branding, Netflix, SVOD, Localization, Globalization*

Table of Contents

Abstract and keywords	
1. Introduction	4
<i>Chapter Outline</i>	6
2. Theoretical Framework	7
2.1. <i>Branding</i>	7
2.2. <i>Television in Transition</i>	9
2.3. <i>From Globalization to Localization</i>	12
2.4. <i>Netflix in The Global Market</i>	13
2.5. <i>Netflix in National Markets</i>	15
2.6. <i>The Dutch Media Landscape</i>	17
<i>Conclusion</i>	18
3. Method	20
3.1. <i>Data Collection</i>	20
3.2. <i>Thematic Content Analysis</i>	21
3.3. <i>Grounded Theory Approach</i>	22
<i>Conclusion</i>	24
4. Results	25
4.1. <i>Content</i>	26
4.2. <i>Innovation</i>	30
4.3. <i>Relation to other Entertainment Forms</i>	33
4.4. <i>Localization Activities</i>	36
4.5. <i>Performance</i>	39
4.6. <i>Competition</i>	41
4.7. <i>Netflix in Social Life</i>	43
<i>Conclusion</i>	45
5. Conclusion	46
References	50
Appendix A	57

1. Introduction

During the last four decades, commercial, technological, and regulatory factors have made it possible for media channels to start operating transnationally. Television channels started crossing borders in the 1980s, and with the rise of internet- and subscription-based television the development of a global media landscape proceeded further (Chalaby, 2002). Most global portals, platforms, and other forms of online entertainment base their organization in the United States of America. From there, organizations coordinate the distribution process to other countries' national markets. Entering those local markets successfully however, can be difficult (Cunningham & Craig, 2016). In order to align expansion strategies as well as possible with local expectations, firms incorporate localization as a strategy of media globalization for television, as argued by Chalaby (2002), Wayne (2018), and Lobato (2019). Consumers can choose from numerous companies in the media sector, ranging from local to global. A key factor in deciding which one to purchase from is branding, making this an important consideration for companies (Blacket, 2009). By researching local marketing strategies of a global brand, this thesis provides insight into the workings of media globalization and localization.

Netflix, a subscription video-on-demand (SVOD) service, is one of the best known examples of how television is crossing national borders. This US-based organization started as a company that delivered DVDs in 1997, launched its streaming service in 2007, and started expanding this streaming service into other countries in 2010. Currently, the firm has over 182 million subscribers worldwide, of which around 70 million are based in the US and Canada, 58.7 million in Europe, the Middle East, and Africa, 34.3 million in Latin America, and 19.8 million in the Asia Pacific (Watson, 2020). The number of subscribers from outside the US thus currently exceeds the number of US subscribers. The company is increasingly focussing and relying financially on its international growth (Alexander, 2020). Netflix entered the Dutch market in 2013 and has gained over 3 million subscribers in the Netherlands since (De Best, 2019). The actual reach of Netflix Netherlands (NL) is even greater because multiple people often share one paid account. This reach and popularity of Netflix NL within the Dutch media landscape make this brand a suitable research topic for this thesis.

Netflix is thus an internationally successful SVOD service, but there is some confusion on how to define the company in relation to more traditional media forms. Lobato

(2019) pointed out that defining Netflix is rather complicated, since there is a lack of clarity on how to understand the company. Netflix does not necessarily belong to one conceptual media category, but exists within multiple categories: television, cinema, and new media. Furthermore, Lobato (2019) argues that it is possible to consider Netflix a transnational or global brand, as well as a national brand. This thesis addresses both the global and the local aspect of Netflix by analysing branding strategies of Netflix NL in comparison to global branding strategies of Netflix US.

This research is not the first to focus on Netflix's localization strategies, but there still is a gap in academic literature which scholars need to address. For example, Wayne (2018) studies the brand identity of Netflix and Amazon, yet he argues that "SVOD services and TV branding practices within transnational contexts" (p. 737) need further research. Although previous studies on some of Netflix's national brands exist as case studies (Daidj & Egert, 2018; Wayne, 2020), research on Netflix's brand in the Netherlands is still missing. This area requires further research for a better and more complete understanding of how Netflix markets its identity in national markets compared to the global market. With this goal in mind, Amanda Lotz and Ramon Lobato established the Global Internet TV Consortium in 2016 to collect dossiers regarding Netflix's local brands, to which several other academic researchers contributed (Global Internet TV Consortium, n.d.). A study on Netflix NL would make their collection, and therefore the knowledge on the firm's local activities, more complete. With Netflix's European, Middle Eastern, and African (EMEA) headquarters based in Amsterdam, from which the firm arranges European operations, a research on this specific market should not be left out. Additionally, this thesis is socially relevant as it gives insights into how a popular and hybrid media brand like Netflix is operating both globally and locally. Differences in branding strategies illustrate how specific markets require specific brands, even if these belong to the same firm. More generally, this research illustrates how globalization can take form locally. Furthermore, SVODs are becoming increasingly popular, so investigating the market leader Netflix to learn more about global firms' local activities is relevant due to the firm's impact on media landscapes. All these reasons led to the design of this research. The research question this thesis focused on is:

RQ: "How does Netflix's brand in the Netherlands compare to its global US-based brand?"

This research addressed this question by using a thematic content analysis with a grounded theory approach. Data collection and coding were systematic processes, with a clear focus on Netflix NL's brand identity and local branding strategies. The results came forth from the final coding frame. As expected, results show that Netflix NL's brand identity

differs from that of Netflix as a global brand as a result of the use of local versus global branding strategies. To understand these national strategies, this thesis considered the workings of the Dutch media market and discussed all findings within this context.

Chapter Outline

This section contains a brief outline of the following chapters. First, this thesis proceeds with a theoretical framework in Chapter 2 with discussions of relevant theories and concepts. This chapter follows the following division of subsections: branding, television in transition, from globalization to localization, Netflix in the global market, Netflix in national markets, and the Dutch landscape. Together, these subsections provide the necessary theoretical knowledge for this research.

The third chapter explains this study's method in detail. It begins with an elaboration of the data collection process. Furthermore, it consists of a description of the qualitative method thematic analysis with a grounded theory approach. This discussion includes the method's workings and goals, as well as the reasons for choosing to use this specific method.

The fourth chapter discusses the results of the thematic analysis. This includes an elaboration on the seven themes that the coding process revealed, and a discussion of the results of coding the data set in relation to the theory. The chapter consists of seven subchapters according to the themes: content, innovation, relation to other entertainment forms, localization activities, performance, competition, and Netflix in social life. This chapter refers to the final coding frame in the Appendix.

The final, concluding chapter answers the research question. It gives a discussion of and reflection on the research process. The chapter looks back at the appropriateness of the theoretical framework and method, and points out the research's limitations. The conclusion ends with suggestions for further research.

2. Theoretical Framework

This chapter discusses theories and concepts related to Netflix's global and local brands to provide a better understanding of this research's topic and its contexts. Since the research question focuses on Netflix's brands, the first section covers theories and definitions regarding brands, brand identity, branding, and brand equity. The role of brands in society and the value brands can hold, stand at the core of this discussion. Next, this chapter discusses changes in the media sector, and specifically in television, whilst positioning this research in the ongoing debate regarding the death or survival of television as a medium. Technological opportunities are behind Netflix's worldwide success. Discussions of the concepts digitalization, media convergence, and personalization provide readers with a better understanding of the interplay between Netflix and changes in the media landscape. The section following television's transition focuses on globalization and localization. Netflix grew out to this global media firm, but applies localization strategies in its national markets. Separate discussions of both concepts followed by their connectedness in the so-called glocalization strategy help understand how Netflix as a firm with global and local brands works. The next section covers research regarding Netflix as a global brand, in the global market. Findings from previous scholars shape an image of Netflix US' branding strategies, to eventually compare the strategies of Netflix NL with. The following section discusses research regarding some of Netflix's local brands to get familiar with Netflix's localization strategies in other markets. The Global Internet TV Consortium provides a collection of research on Netflix's local markets and is therefore the main source for this section. The final theory section concerns the Dutch media landscape.

2.1 Branding

Brands are one of companies' most valuable assets (Plumeyer, Kottemann, Böger, & Decker, 2019). Scholars usually describe brands in the context of consumers' choice-making process in which brands have an identifiable function for consumers that guide them towards certain directions (Weilbacher, 1995; Blacket, 2009; Kaul & Chaudhri, 2017). Steenkamp (2014), too, recognizes this decision-making function of brands and addresses two additional functions for consumers. Brands are risk-reducing as they take away consumers' uncertainties regarding the product. By being identifiable and recognizable for consumers, brands have the ability to make them link their products to certain qualities. Additionally, brands have an

emotional need-fulfilling function. Consumers get emotionally attached to brands, which leads to a need for using specific brands. Therefore, the use of a brand can make consumers feel emotionally satisfied (Steenkamp, 2014). Brands are recognizable by their names or symbols, and brands differentiate their products or services from competitor's products or services (Ghodeswar, 2008). One of this thesis' intentions is to argue that analysis of a brand requires consideration of its context. This research does by asking questions like: in what sort of culture and market does the brand exist, and what other, similar companies exist in this market and how does the brand relate to these? This is important because, as multiple researchers have stated, consumers use brands within these contexts (Weilbacher, 1995; Blacket, 2009; Kaul & Chaudhri, 2017). The statement of Holt (2016), that "brands succeed when they break through in culture" (p. 42), also supports this argument since Holt highlights the importance of the brand's societal context here. This research analyses Netflix's Dutch brand in relation to its local context of the Dutch market, and compares this analysis to Netflix's brand in global contexts.

Firms thus have brands, and these brands can be beneficial for both the firm and consumers. Many different individual brands exist, which are recognizable by their brand identity: "knowledge or associations in the mind of the consumer under different conditions that facilitates brand recall" (Kaul & Chaudhri, 2017, p. 14). As this definition illustrates, brand identities are not set or intrinsic to the firm, but can change as they exist in consumers' minds. The assumption that a firm's brand identity can differ amongst individual consumers follows from this definition. Brand identities of Netflix US and Netflix NL could then differ from each other if the different consumer groups, American and Dutch consumers, hold different associations that make them recall the brand Netflix. Instead of researching the consumers' knowledge and associations, however, this study focuses on how the brand itself and its representatives form Netflix NL's brand identity, or what knowledge and associations they provide for consumers to follow.

Academic interest in brand managing started in the 1970s; it was then that researchers first acknowledged the complexity of branding. Scholars have highlighted the importance of branding since the 1980s (Balmer, 1995). Holt (2016) defines branding as a technique used by companies in which they create the need for a brand that eventually makes consumers dependent on the brand, with the ultimate goal of increasing profits. In the media industry there was a need for changes in branding strategies due to changes in the field itself. Media scholars regard the arrival of Web 2.0 and social media as the main causing factors for changes in the media industry. Even though social media came with new branding

opportunities, the industry's pace increased and branding activities became more complex. Increasing competition and consumers' growing control have caused media companies to lose their powerful positions in the industry (Chan-Olmsted, 2011). This evolving media market thus asks for media firms to be more careful in their branding strategies, as they are increasingly important for a firm's success. Following Keller (2010), Chan-Olmsted (2011) argues that the changing media environment with its multiple channels provides marketing managers of media brands with numerous challenges. Firms can now choose from many different forms of communication to reach their target audience; a choice which needs to be thought through. For a wide reach, companies often include channels with different levels of interactivity and user engagement (Keller, 2010).

Overall, firms implement branding strategies and activities to increase their brand equity (Keller, 2010). Aaker (1991) defines brand equity as "a set of brand assets and liabilities linked to a brand, its name and symbol, that add to or subtract from the value provided by a product or service to a firm and/or to that firm's customers." (p. 15). In addition to this definition, Aaker (1991) states that there are five categories of these assets and liabilities: 'brand loyalty', 'name awareness', 'perceived quality', 'brand associations', and 'other proprietary brand assets'. These factors will be different in each context and determine a firm's brand equity. This brand equity provides value to customers as it eases the process of interpreting information, it makes them more confident in purchasing decisions, and it enhances satisfaction in using the brand's product or service. Brand equity can furthermore provide value to the company by increasing the sales in multiple ways. These advantages for the firm in case of a positive brand equity are usually visible on the long term and over a long period of time.

In order for firms to reach brand equity, Keller (2010) provides a five-step brand resonance model, similar to Aaker's (1991) five categories of assets. This model illustrates the specific order of steps brand managers should follow for an increase in brand equity: first create and stimulate brand awareness, then positive associations, followed by a focus on positive attitudes, attachment, and finally customer activity. Companies therefore must focus on the consumer's perspective when building brand equity (Keller, 2010).

2.2 Television in Transition

There is an ongoing debate regarding television's death or survival as a medium in an ever-changing environment. The idea that television is dying was formed by those who consider

digitalization as a killer of traditional TV, like Mills (2017) and Smith (2017). Others, however, argue against this idea of the dying medium by stating that television is in constant transition, as it has always been (Spigel & Olsson, 2004; Einav & Carey, 2009; Shimpach, 2020). SVOD services like Netflix differ considerably from traditional television networks, but scholars should not regard them as ‘killers’ of television as a medium. As Einav and Carey (2009) note, technological developments have been changing television since its arrival. Image quality has improved, screens became flatter yet bigger, and even the remote control was not always around. How and where consumers use the television has evolved too: from public places, to the living room, to almost everywhere on portable devices like a smartphone. Changes in the environment are therefore opportunities instead of medium-killers. Following Einav and Carey (2009), this research considers Netflix and its competitors – being SVOD services or traditional television networks – in this context of opportunities and an evolving environment rather than the negative context in which television is ‘coming to an end’. Discussing concepts such as digitalization, media convergence, and personalization benefits this research as this creates a better understanding of this changing environment Netflix operates in.

Firstly, the concept of digitalization deserves attention since Netflix is an example of how companies, media forms, and social life have changed in the digital age. Digitalization concerns changing processes (Bloomberg, 2018), and in this research’s context this means processes in the media industry. In his discussion of the digitalization of the television industry, Gerbarg (2009) addresses the shift to digital content and communications, as well as the new mobility of consumers using portable devices. Consumers have more control as to where, how, and on what device they consume television, as well as the opportunity to create and share digital content themselves. Media firms have changed too, with the convergence of different media and the emergence of different revenue models, like online advertisements and subscription-based companies (Gerbarg, 2009). Netflix, now being a subscription video on-demand service after digitalizing many processes (Lobato, 2019), serves as a fine example of how digitalization has played a part in this industry.

Secondly, the concept of media convergence is relevant to discuss when researching Netflix – a product of the convergence of different media forms. The online service consists of a combination of aspects from television, film, and online media (Lobato, 2019). Originally introduced by Jenkins (2001), this term refers to the new relationships between different media forms:

By convergence, I mean the flow of content across multiple media platforms, the cooperation between multiple media industries, and the migratory behavior of media audiences who will go almost anywhere in search of the kinds of entertainment experiences they want. Convergence is a word that manages to describe technological, industrial, cultural, and social changes depending on who's speaking and what they think they are talking about. (Jenkins, 2006, p. 2-3)

Netflix's global and local brands, the focus of this study, exist in an environment filled with all such changes, making the technological, industrial, cultural, and social aspects relevant to understand convergence in this perspective. Convergence is a process driven by digitalization and globalization (Fortunati & Bakardjieva, 2020), and so is the evolution of Netflix (Lobato, 2019). McDonald and Smith-Rowsey (2016) note that scholars commonly use Netflix as an example of convergence, and further argue that innovations in technological convergence are the reason behind the company's success.

Thirdly, the concept of personalization is relevant in this research since Netflix's online service gives personalized recommendations to users based on data of individuals' viewing behaviours (Johnson, 2018). Personalization strategies are increasingly common amongst media companies and have affected the online-television industry greatly (McDonald & Smith-Rowsey, 2016). Technological innovations made it possible to track and collect online user data, which companies then use for personalization. Aguirre, Roggeveen, Grewal, and Wetzels (2016) argue that personalization is about meeting consumers' individual needs and firms use it to improve customer-firm relationships. In order to do this successfully however, companies need information about individual consumers, which they attain by analysing the collected user data. This innovative strategy has affected the television industry, since online services like Netflix use personalization for personalized interfaces filled with recommendations. This innovation has changed consumers' television viewing experience as their content needs are calculated for them. There is, however, a downside to this strategy: the personalization-privacy paradox. Other than helping users to better fulfil their content-needs, personalization strategies can cause consumers to feel concerned about their privacy. Overt data collection minimalizes this negative effect (Aguirre et al., 2016). Netflix is open about its recommendation system in which they expose users to certain titles and accompanying images based on their user data. The company is continuously evolving its personalization strategies in order to improve their service on individual levels (Amat, Chandrashekar, Jebara, & Basilico, 2018).

Overall, the environment in which Netflix exists is in constant transition, with digitalization, convergence, and personalization as some of the most recent and important changes in the industry (Gerbarg, 2009; Lobato, 2019; McDonald & Smith-Rowsey, 2016). The following section focuses on other relevant concepts regarding Netflix's context such as globalization, localization, and glocalization.

2.3 From Globalization to Localization

Netflix as a company has gone through quite the transition. They started out as a local DVD-delivery firm in the United States in 1997 and evolved into a global media company. After the firm's globalization, its national brands in numerous countries asked for localization strategies to fulfil local market-specific needs (Lobato, 2019). This section clarifies Netflix's context of globalization and localization by a discussion of relevant literature regarding these concepts. Globalization, to start with, is "a process in which worldwide economic, political, cultural and social relations have become increasingly mediated across time and space" (Rantanen, 2005, p. 8). Media and communications are what made it possible for these relations to become globalized. Boyd-Barrett (2016) argues that although some may think of globalization as a relatively new process, it actually is not. Global trading relations and the spread of beliefs are examples of early globalization. Although globalization has been around for quite some time, the contemporary form can be recognized by three aspects: its economy's scale involving numerous countries, transnational non-governmental organizations at the core of it, and how media technologies and innovations form it (Boyd-Barrett, 2016). Netflix's globalization process thus falls within this contemporary form: the firm operates in numerous countries globally, is a non-governmental organization at the core of media globalization, and technological innovations made the companies' world-wide spread possible. Steenkamp (2014) notes that in globalizing industries, global brands emerge. He gives the following definition for global brands:

I define a global brand as a brand that uses the same name and logo, is recognized, available, and accepted in multiple regions of the world, shares the same principles, values, strategic positioning, and marketing throughout the world, and its management is internationally coordinated, although the marketing mix can vary. (p. 3)

In his further explanation of this definition, Steenkamp (2014) explicitly stresses the importance of the part "although the marketing mix can vary" (p. 3), as he recognizes the

need for adaptation to the local context in which a brand operates. With this definition, Steenkamp (2014) thus touches the exact point of this study on Netflix's global and local brands, namely that global brands, too, zoom in to local situations. This logically links globalization theory to localization theory.

Definitions of localization mainly focus on the adaptation of a product to a specific country or local market. Since the widespread adoption of the Internet many firms localize their web sites too (Esselink, 2000). Localization can also refer to marketing or branding strategies (Steenkamp, 2014). Due to the focus on Netflix's local branding activities in the Netherlands, this form of localization is most relevant in this research. Whether or not a brand is successful internationally can depend on the quality and implementation of its localization strategies. Taking legal requirements and local competition into account is part of this process (Esselink, 2000). One example of a global brand successfully implementing localization strategies for its local brands is the food chain McDonald's. This company has adapted its products as well as branding strategies according to local market's needs (Dumitrescu & Vinerean, 2010).

As previous discussions illustrated, globalization and localization are interconnected, especially when it comes to global brands and their strategies. The term glocalization (Levitt, 1983) refers to both strategies used together and holds the idea that this combination, rather than just focussing on globalization, is best for global brands. This strategy entails a global mindset for the entire firm, yet a localized focus for each specific market. Companies apply this strategy to their products as well as their branding activities. The strength of glocalization lies in the combination; globalization can make a firm grow beyond borders, whereas localization can make a brand adapt and enhance chances of success in national markets. Local brands keep core aspects and products or services of the global brand to maintain brand resonance, but make other changes for the brand to become the best fit for specific local markets (Dumitrescu & Vinerean, 2010). Netflix has a reputation of a successful global brand that operates in numerous local markets. The following two sections illustrate how Netflix uses globalization and localization combined, which makes the firm an example of glocalization.

2.4 Netflix in The Global Market

This section describes the brand identity of Netflix as a global brand, based in the US, using previous research on this matter. Wayne (2018) studies the branding of Netflix's and

Amazon's SVOD portals related to traditional television networks in the US, and finds that "Netflix has aggressively positioned itself as a replacement for linear television and views traditional television networks as its primary competitors" (p. 726). Netflix US thus emphasizes its non-linearity and how this is a new and better form of consuming television content. This branding strategy, emphasizing how the brand identity differs from and is superior to that of competitors, seems logical considering that consumers use brands to make purchasing decisions easier (Blacket, 2009). Daidj and Egert (2018) however note that there also exist differently structured, less conflicting relationships between competing companies which the following sub-section discusses further. Knowing this, they still acknowledge that traditional and newer media brands are in competition with one another (Daidj & Egert, 2018), like Wayne (2018) finds for Netflix and traditional television networks. Wayne (2018) continues with the notion that Netflix uses its brand-name in the marketing of content produced by Netflix itself, the so-called Netflix Originals, whilst leaving the companies responsible for the production of the other content unacknowledged. However, in their overall branding strategy, Wayne (2018) notices that in 2017, Netflix did not quite build its brand identity around their content, not even their original content, since competitors like traditional networks typically use this as a strategy which Netflix argues to be different from and superior to. Instead, he argues that the branding strategy of Netflix (and similar SVOD portals) focuses more on the "personalized television viewing experience made possible through internet distribution" (p. 30). More recent research, however, suggests that Netflix US is increasingly promoting itself as a high-budget producer of high-quality content (Bhatt, 2019). Furthermore, Netflix US now highlights the idea of a global brand with internationally produced content to differentiate itself from other SVOD services (Lobato & Lotz, 2020).

By analysing statements from Ted Sarandos (chief content officer) and Cindy Holland (vice president for original content), Wayne (2018) finds that Netflix does not base its global brand identity on demographic branding, but on the idea of personalizing content for individuals within a broad audience. Netflix US overtly addresses personalization in its branding activities. Based on their data, Netflix places individual users in certain taste clusters which will enhance their viewing experiences (Shimpach, 2020). As mentioned before, this overt attitude regarding data gathering keeps consumers from having privacy concerns (Aguirre et al., 2016). The company thus uses the service itself rather than its available content as a global selling-point. With this strategy, Netflix indeed positions itself against traditional television channels by emphasizing the new viewing experience Netflix offers and targeting a broad audience. Wayne (2018) refers to this strategy as a portal-as-

brand strategy. Looking at the previously mentioned, more recent findings, however, Netflix's global brand is increasingly implementing a global producer-as-brand strategy next to its portal-as-brand strategy.

Since scholars use terms like transnational and global brands mixed together, Lobato (2019) provides a clear difference in the use of these terms from a television distribution point of view. He uses the term transnational television to simply refer to the crossing of national borders in television distribution, whilst he uses global television only to refer to "television services that operate in a large number of international markets simultaneously" (Lobato, 2019, p. 50). Netflix is both a global and transnational brand (Lobato, 2019), but this thesis namely uses the term 'global'.

2.5 Netflix in National Markets

Apart from research on the global brand Netflix, scholars have researched Netflix's branding strategies within national markets as well. To get a better understanding of how Netflix operates in national contexts, this section discusses results of some of these studies. In their research on business models of competing brands and how they strategically relate to each other, Daidj and Egert (2018) examine the business model of Netflix on the French market. When Netflix entered the French market in 2014 they faced competition from national telecom operators and TV channels, but instead of regarding these television brands solely as competition, Netflix created partnerships with them. These partnerships range from allowing subscribers from the French telecom operator Orange to access Netflix for free the first month, to a more direct competitor, the TV group Canal+, that bought the rights of the popular Netflix Original series House of Cards. Furthermore, Netflix, just like other SVOD platforms or TV channels in France, has to follow the regulatory requirements and provide a certain amount of French content, which is a reason to cooperate with French producing companies. This combined strategy in which competition and cooperation coexist and interact with each other with the goal of creating an advantage on the competitive market is called co-opetition (Daidj & Egert, 2018). With this case, Daidj and Egert (2018) argue that within competitive markets such as the French television market, global brands like Netflix tend to adjust their business models to the national context, making room for cooperative relationships with competing brands for technological, commercial, or regulatory reasons. Companies thus use co-opetition as a localization strategy, like Netflix did in France.

Another national market in which Netflix operates is the television market of Israel, which Wayne (2020) studies regarding Netflix's localization strategies. In his research, he finds big contrasts with Netflix's global branding strategies. Similar to Daidj's and Egert's (2018) research on the French market, Wayne (2020) finds that Netflix Israel has partnered-up with national providers of television to increase their market position. Wayne (2020) creates the new term portal-as-content strategy to show this contrast of Netflix's local branding compared to the global portal-as-brand strategy, aiming on the combined branding strategy of emphasizing both the content and the service in Israel whereas globally Netflix distances itself completely from content branding as done by linear television channels. With this argument, Wayne (2020) clearly shows how much Netflix's global and national branding strategies can differ from each other, and inspires research on more national markets to get a more complete image and understanding of Netflix's branding behaviour.

The Global Internet TV Consortium adopts Wayne's (2020) research on Netflix in Israel, which holds dossiers of similar studies by media scholars of Netflix's local markets. Although less focused on Netflix's local branding strategies yet more on its local contexts, factors like local partnerships, local content, digital infrastructure, and local regulations are recurring themes in these dossiers (Global Internet TV Consortium, n.d.). Like the Consortium (Lobato & Lotz, 2020), one of this research's goals is to contribute to a better understanding of how Netflix works in different national markets. A closer look to the Consortium's dossiers reveals that Netflix uses co-opetition as a localization strategy in multiple markets. In countries like Argentina (Serpe, 2018), Belgium (Evens, 2017), Brazil (Donoghue, 2017), Mexico (Llamas-Rodriguez, 2017), Philippines (Lim, 2018), Spain (Castro, 2017), Taiwan (Tse, 2017), and the United Kingdom (Johnson, 2019), Netflix has partnered up with local television networks, telecommunication corporations and/or production companies. In the Philippines, for example, these partnerships contained bundles with local telecom firms (Lim, 2018), and in the United Kingdom Netflix made a deal with BBC Worldwide in order to provide more British content (Johnson, 2019).

Another recurring subject in the Consortium's scholars research is that of Netflix investing in its own locally produced original content. The series *Las Chicas del Cable* is an example of such an original series produced in Spain (Castro, 2017). Producing and distributing national content in different markets may seem like a voluntary localization approach of Netflix's local brands, but in some countries regulatory forces obligate the SVOD service to include locally produced content. The European content quota of 30%, for example, requires Netflix's brands that fall under the jurisdiction of the European Union to

have at least 30% of their catalogues exist of European content (Johnson, 2019). Another interesting outcome of these nationally-focused studies is that in a number of countries, the audience highly anticipated the arrival of Netflix due to the global brand's popularity, making investments in promotional campaigns close to unnecessary (Global Internet TV Consortium, n.d.). This illustrates that Netflix closely connects yet differently organizes its global and local brands, with the goal of filling local needs.

2.6 The Dutch Media Landscape

This section describes the environment in which Netflix entered the Dutch market in 2013 and in which it has operated since. The Dutch television industry exists of public and commercial broadcast corporations, as it has since its arrival. The public broadcast corporations – NOS, NTR, AVROTROS, BNN VARA, KRO NCRV, Omroep MAX, EO, and VPRO – receive government support, whereas the others like RTL and SBS are commercial with a revenue model based on advertisements (Rijksoverheid [National Government], n.d.). Like in many other European countries, the Dutch public broadcast corporations have existed since the early stages of the new medium as a response to fear of its effects on people. These corporations had, and still have, the goal of stimulating feelings of national citizenship (De Leeuw, 2003). Even though Dutch television still consists of public and commercial broadcast corporations, the television landscape has evolved. Previously discussed concepts like globalization, digitalization, media convergence, and personalization have affected the Dutch media landscape too. Historically, a diverse pillarization characterized the Dutch media environment, but over time this turned into a focus on different lifestyles (De Leeuw, 2003). Digital and convergent forms of television arrived in the beginning of the century. This changed the environment, but traditional television forms still exist (Baaren, 2008). In the years before Netflix's arrival, the number of Dutch television households had increased to 7.5 million in 2013 (De Best, 2019). The percentage of households with internet access through its television device had increased from 11.4% in 2012, to 17.3% in 2013. Digital reception had increased as well, with a total of 82% in 2013 (Stichting Kijkonderzoek, 2014). This increase illustrates how internet and television were becoming more connected in the Netherlands in the time of Netflix's arrival.

When Netflix entered the Dutch market on September 11, 2013, the Netherlands became the company's seventh European market. Since its arrival, the Dutch brand offered the audience the first month of subscription for free, after which users could pay eight or

twelve euros – depending on which package they preferred – by iDeal or creditcard. This promotion eventually ended in the beginning of 2020 (Wokke, 2020). The service was immediately available on numerous devices like smart TVs, smartphones, and gaming consoles. The catalogue existed from the beginning of a combination of Dutch and international content. The service furthermore offered HD quality, and was immediately open about its personalization strategies to fulfil users' individual needs (Poort, 2013).

Since its arrival, Netflix has grown to be the market leader of the many SVOD services in the Netherlands today, with Disney+ and the purely Dutch Videoland as its main competitors (Streamwijzer, 2020). Especially among the younger generations, Netflix is a popular service. 87% of Dutch users prefer to watch Netflix on the television or smart TV, and 24% prefers consuming Netflix's content on their smartphone. Furthermore, the Dutch prefer consuming VOD over linear television and social media (De Best, 2019). As these statistics illustrate, the Dutch environment is rather favourable for Netflix NL. Since 2015, Amsterdam is the home base of Netflix's European, Middle Eastern, and African (EMEA) headquarters. Netflix chose Amsterdam as its location due to access to talent and the favourable regulatory environment (Invest In Holland, 2019).

Like other local Netflix brands, Netflix NL has created local partnerships. In 2014, the mobile phone provider Vodafone offered its customers with a special subscription six months of free access to Netflix NL (Chel, 2014). Similarly, from September 2018 until January 2019, the mobile phone provider T-Mobile offered its customers a bundle which included three months free access to Netflix NL (T-Mobile, n.d.). After producing several series for Netflix in the last years, the production company Dutch FilmWorks signed a multiple-year collaboration-contract with Netflix NL in 2019 (Dutch FilmWorks, 2019). Furthermore, Netflix NL representative Sloëtjes announced that the brand is currently in conversation with the public broadcast corporation NPO regarding partnering-up in producing five Dutch series (Algemeen Nederlands Persbureau, 2020). These partnerships are similar to those of other local Netflix brands, and examples of Netflix NL's localization activities.

Conclusion

This chapter provided a theoretical framework specifically for this research. It started with a clarification of the value of brands, and proceeded with definitions of accompanying concepts like brand identity and branding. Since consumers make decisions based on brands, they are considered valuable assets (Weilbacher, 1995; Blacket, 2009; Kaul & Chaudhri, 2017;

Steenkamp, 2014). The second section started with positioning this research in the debate regarding the ‘death’ of television. Following – amongst others – Einav and Carey (2009), television is seen as a medium in constant transition in this thesis. Digitalization, media convergence, and personalization were responsible for the transitioning of the medium that allowed Netflix to thrive and build global and local brands. The third section discussed the processes of globalization and localization. It gave definitions of these concepts and explanations of how companies like Netflix with a global brand incorporate localization processes in local markets for their local brands. The fourth section discussed research on Netflix in the global market. This section noted how Netflix focused its global brand identity on being technologically innovative (Wayne, 2018), and recently more on being a high quality content-producer (Bhatt, 2019). The fifth section discussed existing research on Netflix in national markets. Netflix localized its branding strategies in national markets by creating local partnerships and focusing on content (Wayne, 2020). The final section elaborated on Netflix NL’s market context: the Dutch media landscape. With good broadband connections and an increased connectedness of internet and television (Stichting Kijkonderzoek, 2014), the Netherlands proved a logical market for Netflix to expand to. Netflix has been the market leader since its arrival in the Netherlands and created local partnerships.

3. Method

This chapter introduces the methodology used in this research. It begins with an explanation of the data sampling and collection processes. An introduction of qualitative content analysis follows, after which there is a discussion of the more specific method thematic analysis with a grounded theory approach. This methodology section furthermore explains constant comparison, initial coding, and final coding. It also includes the research's operationalization and reasons for choosing specific methods.

3.1 Data Collection

This thesis collected data from publicly available media sources published since Netflix entered the Dutch market in 2013 until this year, 2020. The initial data set included 55 news articles, interviews, videos, and statements regarding Netflix NL. This thesis fully analysed nineteen of these items that provided this research with the most valuable information. This selection of nineteen items consists of two online news articles from the Dutch newspaper 'De Volkskrant', two online articles from the Dutch news site 'Quote', one online article from the Dutch public broadcast corporation 'NOS's news site, two news articles from the Dutch news platform 'Intermediair', one article from the Dutch newspaper 'Het Parool', one interview with Netflix's Anne Koning, one article on a website that collects information regarding Netflix NL, one article on a lifestyle website, and eight items from YouTube: an interview video with Netflix CEO Reed Hastings, the description of Netflix NL's YouTube account, an interview video with Netflix representative Joris Evers, two advertisement videos created for Dutch television commercials, and three instruction videos on how to use Netflix. All of these nineteen items contained relevant information about the brand identity or branding strategies of Netflix NL, which was a sampling criterium. The items were all publicly available online, and found using search engines and YouTube with search terms such as 'Netflix Netherlands', 'Netflix Nederland', 'Netflix NL', with and without added terms like 'branding', 'strategies', 'representative', or specific names of Netflix representatives. On occasion, the snowball sampling technique proved useful when the platform of a useful item gave other useful item suggestions. Furthermore, in the data collection process there was a strive for finding information by multiple Netflix representatives, and from different years within the period of 2013-2020 to make the data set as inclusive as possible. This all led to the collection of 55 items, of which the full analysis

thus included nineteen. There were 151 relevant units of analysis within these nineteen items, which this thesis analysed individually and in relation to each other and their contexts.

3.2 Thematic Content Analysis

In order to find an answer to the research question, this study carefully analysed communicative material containing information about Netflix NL's brand identity. This means the research used a qualitative content analysis as the method, as this specifically focuses on analysing communicative material. Qualitative content analysis has a systematic nature, as it allows the material to be filtered and ordered in a way that suits the research best. Furthermore, qualitative content analysis incorporates the context of the communicative material because this could hold valuable information about the content of the material (Mayring, 2004). Therefore, this thesis included the context of the Dutch media environment in which Netflix communicates their branding strategies in the process of analysis. Mayring (2004) differentiates between a narrow and a broad contextual analysis: the narrow method considers only the direct textual environment, and the broad method considers additional information beyond the material as well. Since this thesis embedded Netflix NL in the broad context of the Dutch media environment, and even in relation to the global media environment, it performed a broad contextual analysis. In summary, this thesis consisted of systematically analysing the communicative material by means of a qualitative content analysis as this method fits the research question best.

More specifically, this thesis performed a thematic analysis of the data set with a grounded theory approach including initial coding followed by focused coding. Thematic analysis is "a method for systematically identifying, organizing, and offering insight into patterns of meaning (themes) across a data set" (Braun & Clarke, 2012, p. 57). However, only the themes relevant for the research needed detailed analysis, which was possible due to the flexible nature of this method (Braun & Clarke, 2012). This flexibility thus allowed the focus on certain categories and themes found within the data set that contained valuable information regarding Netflix NL's branding strategies, whereas other units were left out. This thesis coded all units within the items of the data set that potentially were of relevance to finding an answer to the research question. Since 151 units within nineteen items were possibly relevant for this research, this study consisted of coding and analysing these 151 units and left out remaining texts in the items. There are multiple ways to use thematic analysis which is why it is relevant to discuss the specific approach when using this method

(Braun & Clarke, 2012). This thesis used a thematic analysis with a grounded theory approach.

3.3 Grounded Theory Approach

Grounded theory is an interactive approach to data oriented toward theory construction. This approach sets guidelines for both the data collection and analysis, as it allows for data collection based on certain criteria and the coding process and analysis as a whole serve to construct theories out of the found themes (Charmaz, 2014). This research used the grounded theory approach to give focus and construct theories from the data set regarding the branding strategies of Netflix NL. This process consisted of initial and focused coding. Initial or open coding was the first round of coding that started during data collection and can be seen as the first step of analysis of the data. Before the data set was complete, the analysis began with initially yet carefully coding the first six items with an open mind to what themes or theories could follow from the data. There was constant comparison of units of analysis, data items as a whole, and analytic findings based on the discussed theories and contexts. This allowed for the establishment of relevant themes. There were a total of 42 relevant units of analysis in the first six items, and in the initial coding process these units all found a place in the initial coding frame. The outcomes of this process helped to develop a better focus on certain relevant themes during data collection and gave more direction to the analysis (Charmaz, 2014). Six main themes evolved from the initial coding phase, which directed the further process of data collection towards content, innovation, relation to other entertainment forms, localization activities, performance, and competition. Initial coding and constant comparison thus made data collection more focused on relevant data for the construction of theories regarding Netflix NL's branding strategies.

After the initial coding, data collection continued and the complete data set included 55 items. Of these 55 items, nineteen received full analysis. These nineteen items included the six initially analysed items, so thirteen more made the focussed coding process. Within the nineteen items, 151 units of analysis received full analysis and placement in the final coding frame. Focused or final coding means sorting and highlighting certain initial codes regarded as more significant for the research to sharpen the focus and give a theoretical direction (Charmaz, 2014). The final coding process ensured that all categories and subcategories were set and gave all units of analysis a place within at least one of the subcategories. Since this thesis' focus on the branding strategies of Netflix NL as a national

brand, and with previous research on Netflix's national brands in mind, finding information on localised strategies and thus the creation of localization as a main theme was likely. One of the seven found themes was indeed 'localization activities'. The other main themes were content, innovation, relation to other media forms, performance, competition, and Netflix in social life. Only 'Netflix in social life' was new compared to the initial themes. The following definitions applied to these themes:

CONTENT = statements or information regarding Netflix NL's content, including future content plans, investments in content, production of content, distribution of content, and quality of content.

INNOVATION = statements or information regarding Netflix NL's service being technologically innovative.

RELATION TO OTHER ENTERTAINMENT FORMS = statements or information regarding how Netflix NL relates to other entertainments forms, meaning any entertainment forms different from Netflix's SVOD service.

LOCALIZATION ACTIVITIES = statements or information regarding Netflix NL's localization activities in the Netherlands, including (future plans for) pricing, campaigns, content, strategies, promotions, products, or services.

PERFORMANCE = statements or information regarding the previous, current, or future (expected) performance of Netflix NL. Including financial performance, number of subscribers, expansion, or competitive performance.

COMPETITION = statements or information regarding Netflix NL's competition or lack of competition. Including legal and illegal entertainment networks, services, or other forms of competition in the Dutch media market.

NETFLIX IN SOCIAL LIFE = statements or information regarding Netflix NL existing in, being visible in, or affecting social life and/or the quality of life of Dutch users. Including Netflix phenomena such as binge-watching, Netflix & chill, and Netflix-cheating.

Examples of the subcategories are 'war for content' in the content theme, 'easy to use' in the innovation theme, 'like traditional TV networks' in the theme relation to other entertainment forms, 'localized catalogue' in the theme localization activities, 'good performance' in the performance theme, 'local (S)VOD services' in the competition theme, and 'improving users' lives' in the theme Netflix in social life. The analysis of the final coding frame included incorporating the theories and context described in the theoretical framework. The final step of this research was putting all findings together and formulating an answer to the research question.

Conclusion

This methodology chapter explained the data collection process and this research's method. The data collection process started by collecting items with information regarding Netflix NL's brand identity given by the brand or its representatives, and initially coding six items. The initial coding phase gave the research more focus, as it structured further data collection and analysis. After completing the data collection, the data set considered 55 items. Nineteen of these received full analysis, which resulted in the final coding of 151 units of analysis. Analyzing the final coding frame in detail led to the formulation of an answer to the research question. The following chapter describes the results of this analysis.

4. Results

This chapter discusses the research's results in detail based on the final coding frame in Appendix A. Thematically analyzing the sample of nineteen items resulted in seven main themes regarding Netflix NL's brand: content, innovation, relation to other entertainment forms, localization activities, performance, competition, and Netflix in social life. This chapter covers each of these themes in sub-sections. These sections furthermore consist of an elaborated discussion of the subcategories created for the units of analysis, as well as a discussion of how the different themes relate to each other and the context of the time in which they are evident.

The results present multiple examples of relevant findings, by some of Netflix NL's representatives. One of these representatives is Netflix co-founder and CEO Reed Hastings. Even though he relates mostly to the global brand, he is involved with the Dutch brand as well as he gave numerous interviews including statements about the expansion to the Netherlands since 2013. His high status within the company and his presence in the media as a Netflix representative led to the choice to include and highly value the content of his statements. Another Netflix representative this section refers to is Greg Peters, Chief Product Officer at Netflix since July 2017. His function includes building the Netflix experience and he holds valuable information about Netflix Originals. Therefore, his statements helped with a better understanding of Netflix NL's attitude towards and use of original content. Even more involved in the production of Netflix Originals was Allie Goss, whose function was VP of Original Series from July 2006 until October 2019. Statements from her regarding Netflix NL until October 2019 were therefore included in the results as well. Some sections of the results furthermore refer to information provided by Janneke Sloëtjes, Director of Public Policy, Europe. Since she has been responsible for local strategies within Europe since September 2014, this thesis considered her statements regarding Netflix NL as valuable. Numerous examples in the results section include statements made by Joris Evers, who was Head of Communications for Europe, Middle East and Africa at Netflix from July 2014 until September 2016. His function included communicating information about Netflix's brands in these areas, making his statements about Netflix NL relevant for this research. Another Netflix representative who made relevant statements about Netflix NL is Anne Koning, who started at Netflix as Manager Social Media and Brand in European markets from 2014 until 2016, then became Senior Manager Social Media & Brand leading Northern Europe from 2016 until 2019, and has been Senior Manager Global Creative Marketing for International

Originals since January 2019. Her insights from this marketing and social media viewpoint were relevant to gain information about Netflix NL's branding activities. Finally, Debra Chinn, currently Director International Dubbing at Netflix, revealed information about how Netflix NL localizes its product for the Dutch culture.

By linking the findings to previous research regarding Netflix's global brand, this chapter discusses insights on how Netflix's Dutch brand compares to Netflix's global brand. This chapter provides all the information necessary for the final, concluding chapter that follows after this chapter.

4.1 Content

One of the themes that emerged from systematically coding the data set was 'content'. This main category includes all units of analysis containing statements or information regarding Netflix NL's content, including future content plans, investments in content, production of content, distribution of content, and quality of content. This theme occurred in many items from the entire period of Netflix's arrival in the Netherlands in 2013 until the most recent items from 2020. Content as a theme is thus a constant factor in Netflix NL's branding strategies in this time period. Initial and final coding divided the units of analysis within this category in numerous subcategories, which reveal more in-depth information about Netflix NL's brand identity related to content.

One of these subcategories is Netflix NL as a 'provider of great content', existing of positive statements about the quantity and quality of the brand's offer of series and films. For example, in an interview video with Netflix's co-founder and CEO, Reed Hastings, about the expansion to the Netherlands, he said: "You know, we have great content. Frankly we have so much content you can never watch it all. So you know we got a lot there. It's just amazing shows." (Tweakers, 2013, para. 7). As this example shows, Netflix emphasizes both the quantity and quality of the service's catalogue. In doing so, Reed Hastings suggests that the amount of great content is an important aspect of Netflix NL's brand identity. In the same year, Netflix NL emphasized its great content in an advertisement for Dutch TV by using phrases like "All you can laugh", "All you can cry", "All you can thrill", "All you can love", and finally "Netflix – all you can watch" (Hewelt, 2013). By repeating the word 'all' in relation to different emotions, Netflix NL emphasized the completeness of its catalogue and how it provides content in a lot of different genres. These examples illustrate how Netflix NL explicitly connects its brand to having great content by repeating this idea multiple times

in one answer to a question or in one advertisement. Promoting the amount and quality of content, thus, must have been one of the main focus points in Netflix NL's marketing strategies, at least in the time when Netflix entered the Dutch market as these examples from 2013 show. Netflix NL using this strategy when they just entered the market illustrates that the brand used its content to attract new subscribers. Looking back at the theoretical framework, creating brand awareness and positive associations are the first two steps of Keller's (2010) brand resonance model. Netflix NL created positive associations by emphasizing its great content. In 2014, Netflix NL still used this 'provider of great content' strategy when they released three instruction videos. In the instruction video on how to watch Netflix on a television screen, they included the sentence "zodat je kunt kijken naar de vele series en films die Netflix je te bieden heeft" [So you can watch the many series and films Netflix offers you] (Netflix Nederland & België, 2014). In the video on how to try Netflix for free, they stated "krijg direct toegang tot het volledige Netflix-aanbod van series en films" [get immediate access to Netflix's full offer of series and films] (Netflix Nederland & België, 2014). And in the video on how to watch Netflix on a mobile device they used the words "kijken naar wat je maar wilt" [watch whatever you like] (Netflix Nederland & België, 2014). These examples illustrate how Netflix NL was still working on Keller's (2010) second step of creating positive associations by emphasizing its great content in 2014, yet the examples' contexts reveal they were already encouraging customer activity, the final phase of building brand equity. These 2014 examples are similar to the 2013 examples in the way that they speak to the target audience, those who would potentially subscribe to Netflix. The fact that they still used content to promote their service and to attract new subscribers suggests that this strategy worked in 2013, and remained a focus in 2014 as Netflix was still trying to grow a year after the brand had entered the Dutch market. In items from 2020, this emphasis on providing great content returned. On Netflix NL's YouTube account, the description says "Netflix is een streaming-service waarmee onze leden allerlei bekroonde series, films en documentaires kunnen kijken" [Netflix is a streaming-service with which our members can watch all sorts of award winning series, films, and documentaries] (Netflix Nederland & België, 2020). Netflix NL's portal-as-content strategy thus started out as a way of creating positive associations amongst the target audience to attract new subscribers, but is still used in 2020, which illustrates that Netflix NL's brand identity over the years includes the great content they provide. Even though this strategy started out as a way to attract new customers, Netflix NL decided that its content should be a consistent factor in communicating its brand identity over the years to existing customers as well.

Indirectly, this subcategory of great content relates to the ‘innovation’ theme, as the technological innovations behind the service make it possible for users to have access to this kind of catalogue. Furthermore, this subcategory relates to the theme ‘relation to other entertainment forms’, since Netflix NL distances itself from other types of entertainment, like traditional linear television or cinema, by emphasizing its online catalogue which gives users immediate access to a lot of great content. This illustrates that the content strategy is intertwined with other themes and at the core of Netflix NL’s branding strategies. Looking back at research regarding Netflix’s global brand, it were the innovations rather than the content that Netflix US originally promoted (Wayne, 2018), even though they later included original content in its branding strategy (Bhatt, 2019). Netflix NL’s strategy of promoting its entire catalogue as a whole is thus different from Netflix’s global strategy, yet indirectly linkable to the portal-as-brand strategy.

Another subcategory within this theme that emerged from the data was ‘war for content’. In two items from 2013, Netflix’s CEO addresses this war of content directly. A Quote news article mentions how Reed Hastings told them the following: “Je moet ons zien als een lokale zender. Andere zenders hebben contracten met film- en serie-aanbieders en als dat zo is, kunnen wij een bepaalde serie, of de meest recente afleveringen nog niet aanbieden” [You should see us as a local channel. Other channels have contracts with providers of films and series, and if they do, we can’t offer a certain series, or the most recent episode yet] (De Meulder, 2013, para. 5). Similarly, in another interview the CEO said: “We have to compete for shows with RTL, HBO, and if they win, then they block us from it so it’s exclusive licensing” (Tweakers, 2013, para. 6). Apart from these examples being explanations on how SVOD services obtain content, the context reveals that Hastings mentioned this war for content in defense of not having all good content. So, whereas the previous subcategory revealed that Netflix NL promoted its service with its great content, they also defended themselves for not having as much content as users wish for. However, in their defense they included competitors to suggest that all providers of content have to deal with this issue, whereas in their promotion of content, they differentiated themselves from competitors. This differentiation is similar to Netflix’s global strategy (Wayne, 2018). The subcategory ‘war for content’ is thus closely linked to the ‘competition’ theme. Therefore, the choice of the portal-as-content strategy meant that Netflix NL did not only have to promote its great content, but also needed to be able to defend any lacking content. This subcategory was, however, only visible in items from 2013 and absent in more recent items. This suggests that the explanations and defenses in this subcategory were part of Netflix’s introduction in

the Netherlands regarding how the brand works. Additionally, later on Netflix became increasingly active as a content producer itself, which gave the firm the rights to their own series and films and allowed them to focus on the promotion of having great content rather than the defense of lacking content. This is evident in the next subcategory: ‘Netflix as content producer’.

Similar to recent research on Netflix’s global strategy (Bhatt, 2019), Netflix NL has been increasingly promoting itself as a producer of content. Reed Hastings mentioned in an interview in 2013 after a question about missing episodes: “that’s why we’re expanding exactly into original content ... those shows we control the rights and then we make sure it’s available at the same time” (Tweakers, 2013, para. 11). Hastings said this when Netflix had only recently started producing original content and this illustrates that a reason for doing so was to avoid the ‘war for content’. It was many years later that Netflix NL actively implemented a producer-as-brand strategy, aligned with the continuous portal-as-content strategy. In a 2018 news article, NOS spoke with Netflix representatives Allie Goss, then VP of Original Series, and Greg Peters, Chief Product Officer, about the production of a Dutch Netflix Original series. Allie Goss said: “Er komt een Nederlandse *original* aan. We zijn ermee bezig [There is a new Dutch *original* coming. We’re working on it]” (Bouweman, 2018, para. 1). Even though this quote specifically mentions a Dutch production, the strategy behind it is that of marketing Netflix NL as a producer, instead of marketing localization activities. In the same article, NOS mentions that Greg Peters said: “Het maakt ons steeds internationalere publiek niet uit in welke taal een serie is, zolang het maar een goede is” [Our increasingly international audience does not care what language a series is in, as long as it’s a good one] (Bouweman, 2018, para. 4). This illustrates that Netflix’s productions, created in any country, serve the international market instead of solely the original local market. The argument given for this international distribution focus of Netflix’s Originals is that they only produce high quality content, for which there is a demand globally. This producer-as-brand strategy is thus, like the portal-as-content strategy, focused on marketing Netflix NL’s high quality content. Additionally, the Dutch would not necessarily prefer local content over international content, as Netflix’s Director of Public Policy in Europe, Janneke Sloëtjes, said:

Daarbij is het een belangrijke factor dat wij het prima vinden om internationale content te streamen. In het Engels dus. Daarom heeft Netflix ervoor gekozen om eerst in landen series en films te laten maken waar abonnees meer waarde hechten aan content in hun eigen taal. [Besides, it is an important factor that we think it’s fine to

stream international content. So, in English. That is why Netflix chose to first produce series and films in countries where subscribers attach more value to content in their own language.] (Korevaar, 2020, para. 6)

Netflix NL thus values high-quality productions suitable for multiple markets over local productions created for the Dutch audience. This suggests that producing local content is not part of Netflix NL's localization strategies, but more so part of globalization strategies. The above statement of Janneke Sloëtjes further suggests that other local Netflix brands do use local productions as localization strategies, but this simply would not be necessary in the Netherlands. Netflix NL is therefore openly against local regulations that would require them to produce a certain amount of local content, like the European quota that requires them to have 30% of their catalogue consist of European productions. Longing for freedom to produce what they like, where they like is in this way added to Netflix NL's brand identity. Overall, Netflix NL has been increasingly implementing a producer-as-brand strategy, even though this strategy is not focused on localized productions but instead emphasizes the globality of the brand. The portal-as-content strategy was already around in Netflix NL's early stages, and remains part of its marketing strategies today in combination with the producer-as-brand strategy. Units of analysis in this item therefore revealed that having great content is a constant factor, whereas more recently their own internationally produced content is increasingly highlighted. So, like Netflix's global brand, the Dutch brand increasingly used a producer-as-brand strategy, but unlike the global brand Netflix NL combined this with the strategy they used from the start: the portal-as-content strategy.

4.2 Innovation

The theme 'innovation' was evident in many items, mainly dating from the first three years since the arrival of Netflix in the Netherlands. Units of analysis containing statements or information regarding Netflix NL's service being technologically innovative belong to this category. One way in which the Dutch brand highlighted its innovative character was through promoting the service as 'easy to use'. Doing so highlights how innovative technologies made the brand user-friendly. In an interview Reed Hastings said that "Netflix is so much easier than torrenting" (Tweakers, 2013). The easiness of the service, made possible by its technological innovativeness, is thus a reason for Netflix being superior to illegal competitors according to Hastings. The focus on the user was evident in this subcategory; Netflix NL

emphasized the idea that they use the brand's technological innovativeness to fulfill the users' needs of using the service without difficulties. Netflix NL furthermore did this in instruction videos from 2014 in which they repeatedly emphasized that the service was easy to use. In the video about watching Netflix on a TV screen, they stated "Je selecteert dan gewoon de Netflix app in het menu van je tv" [You just select the Netflix app in the menu of your TV], and "Het enige wat je hoeft te doen is..." [All you have to do is...], after which they explicitly called their service "eenvoudig" [simple] (Netflix Nederland & België, 2014). The description of the video regarding the free promotion stated: "Het is simpel, ongecompliceerd en je zegt op wanneer je wilt" [It's simple, uncomplicated and you cancel whenever you want] (Netflix Nederland & België, 2014). In the video on how to watch Netflix on a mobile device, they stated: "Netflix kun je eenvoudig bekijken" [you can easily watch Netflix], named the service "eenvoudig" [simple], and the description mentioned "Met Netflix kun je gemakkelijk onderweg kijken" [With Netflix you can easily watch on the way] (Netflix Nederland & België, 2014). In all videos, Netflix NL thus repeatedly emphasized that it is a simple, user-friendly service. The fact that they created instruction videos, which would usually explain more difficult actions, to argue how easy Netflix is to use, says something about the audience. Netflix NL obviously created these videos for an audience that was still learning about using digital technologies. By emphasizing how easy the service is to use, Netflix NL guided the Dutch audience towards using their digital technology. Netflix NL thus took on the role as digital educator when they created these instruction videos in 2014. Joris Evers as Head of Communications for Europe, Middle East and Africa additionally stated in 2015 that Netflix is "heel gemakkelijk te gebruiken" [very easy to use] (Draadbreuk, 2015, para. 6). So even though marketing the brand's innovativeness is similar to Netflix's global portal-as-brand strategy, Netflix NL adapted this strategy to the Dutch culture. With the Dutch being open to try new things and having great broadband connections, Netflix NL markets itself more as a leader of change; as a brand continuously focused on innovation that is the first to add new dimensions to the Dutch media market. The examples above furthermore illustrate in the first three years of the Dutch brand's existence, Netflix NL and its representatives emphasized they use technological innovations to the advantage of the brand's users. In items from later years, this marketing of Netflix NL as easy to use is missing. This strategy was thus part of the initial strategy of creating positive brand awareness, positive attitudes towards the brand, and attracting new customers, but was no longer necessary once the brand had reached a certain popularity and many loyal customers as market leader. This changing strategy relates to the theme 'relation to other entertainment

forms', as by promoting the brand's innovative character Netflix NL differentiates itself from more traditional forms of entertainment like linear television. Netflix US initially focused on this strategy of emphasizing technological innovations to distance oneself from linear television as well (Wayne, 2018). However, the digital shift in the Dutch media market caused Netflix NL to decreasingly use this strategy, as Netflix became the successful market leader it still is today and found other (S)VOD services to be their competitors instead of regular TV. This made emphasizing the brand's innovativeness and user-friendliness less relevant as this was no longer how Netflix NL differed from its competitors. Relating this theme to other findings and the context thus reveals a logical explanation for Netflix NL emphasizing the easiness of the service in its early years and letting this strategy go at a certain moment in time.

In its early years, Netflix NL furthermore promoted that its service is affordable yet innovative in the subcategory 'low price high quality'. In a Dutch Netflix advertisement shown in television commercial breaks in 2013 for example, they highlighted the price of 7.99 euros per month amongst references to the innovativeness and content (Hewelt, 2013). Reed Hastings also emphasized this in an interview: "we're unlimited watching for a low price" (Tweakers, 2013, para. 6). In the video on Netflix's free promotion in 2014, they again mentioned this: "hoe vaak je ook kijkt, maar 1 laag maandbedrag" [no matter how much you watch, only 1 low monthly amount] (Netflix Nederland & België, 2014). In the description of the 2015 TV commercial, Netflix NL mentioned the price of 7.99 euros per month again (Netflix Nederland & België, 2015). Additionally, in an interview from 2015, Joris Evers named Netflix "betaalbaar" [affordable] (Draadbreuk, 2015, para. 6). These examples illustrate that Netflix NL used technological innovations to build a high quality, yet affordable and reachable brand. This combination suggests that the service speaks to a broad target audience: those with an interest in new technological innovations and who can afford 7.99 euros per month. Since most of the units of analysis in this theme came out in 2013, 2014, or 2015, Netflix NL most likely deliberately implemented this innovative portal-as-brand strategy as a start-up strategy. Namely, it is more evident in times that Netflix NL focused on attracting new customers, rather than keeping existing customers as the examples show the brand mentioned the low price to persuade people to subscribe. Like it became unnecessary after three years for Netflix NL to market the service's easiness and user-friendliness, focusing on the affordable price for the innovative service became unnecessary as well. This relates to the theme of 'competition' as in the last couple of years, many

different SVOD services have launched in the Dutch market, making promoting similar technological aspects less relevant.

Other subcategories included the fact that consumers can use Netflix on numerous devices and watch it anywhere they prefer, Netflix as a new experience made possible by new technologies, Netflix as smart and capable of making personalized recommendations for individual users, Netflix as an online service, that within the firm there is room for creative experimentation, and that the brand does and will always make room for innovation. Overall, Netflix NL thus used a similar innovative portal-as-brand strategy as the global brand, but did this mainly in the first years when new customers needed to be attracted and adapted it to the Dutch context. The only unit of analysis found for this theme after 2015 was one describing how Netflix is accessible on many devices in 2020, which is explainable by the fact that new devices can break through and Netflix NL keeps up with such evolvments in the digital culture.

4.3 Relation to other Entertainment Forms

The theme ‘relation to other entertainment forms’, consists of units of analysis that include statements or information regarding how Netflix NL relates to other entertainment forms, meaning any entertainment forms different from Netflix’s SVOD service. In the data set, one statement regarded Netflix NL’s relation to cinema. When Reed Hastings received the question in a 2013 interview whether or not cinema is competition, he answered: “No, that’s not. That’s much more of a social experience, going to the cinema and seeing a movie” (Tweakers, 2013, para. 9). He thus argued Netflix’s relation with cinema is non-competitive because of the different nature of the entertainment forms, which is why cinema is never mentioned in the ‘competition’ theme. The fact that the relation with cinema did come up is explainable by the time in which the CEO stated this. In 2013, Netflix had just entered the Dutch market and the audience was still learning about how Netflix NL would fit within this market, as this example illustrates. Later items did not include information about Netflix’s relation with cinema anymore, which suggests that uncertainties about the brand’s identity in relation to cinema disappeared.

Other items in this category considered the relation between Netflix NL and traditional TV networks. There were two subcategories regarding this topic: ‘like traditional TV networks’ and ‘unlike traditional TV networks’. In some items from 2013 and 2015, Netflix NL representatives made statements in which they considered the brand to be similar

to local, traditional television channels or networks. For example, in a 2013 news article from Quote, Reed Hastings said: “Je moet ons zien als een lokale zender. Andere zenders hebben contracten met film- en serie-aanbieders en als dat zo is, kunnen wij een bepaalde serie, of de meest recente afleveringen nog niet aanbieden” [You should see us as a local channel. Other channels have contract with providers of films and series, and if they do, we can’t offer a certain series, or the most recent episode yet] (De Meulder, 2013, para. 5). Hastings linked Netflix to traditional TV networks here, by comparing how Netflix obtains content for their catalogue versus how traditional networks obtain content for their linear schedule and focused on the similarities of these processes. The content section also discussed the above example, as it illustrates the ‘war for content’ providers of films and series deal with. This unit is also relevant in this section, as it illustrates how Netflix NL uses a comparison with traditional TV channels and networks to explain how they all acquire their content. In another interview with Reed Hastings in 2013, he similarly said: “Well it’s the way TV channels have always worked, I mean I wish we could offer everything, you know for a low price and we want to work towards that, but given that we’re blocked” (Tweakers, 2013, para. 7). He uses traditional TV channels here to explain and defend Netflix for lacking content. So before explaining why Netflix’s catalogue did not include all available content, he drew attention to the fact that traditional TV networks, which were the popular norm when it comes to watching series and films before the industry digitalized, also dealt with this problem of competition and content. Joris Evers used the same tactic in 2015 when being confronted with missing content: “dat is eigenlijk vergelijkbaar met dat klassieke traditionele televisie” [that is actually similar to that classic, traditional television] (Draadbreuk, 2015, para. 4). Netflix NL marketing themselves as similar to traditional networks aligns with Wayne’s (2018) findings on localized branding in Israel being different from the global strategy of aggressively distancing the brand from traditional television. In all of these ‘like traditional TV networks’ cases, however, the comparison was made in relation to the ‘war for content’, as discussed in the content section. In defense of the lack of specific content on Netflix NL’s portal, the brand compared itself to traditional television networks that, like Netflix, offer a limited amount of content due to rights and competitors. As this subcategory illustrates, the themes ‘competition’, ‘content’, and ‘relation to other entertainment forms’ are closely related to each other. This strategy of marketing Netflix NL as similar to traditional television networks was only evident in items dating from 2013 and 2015; Netflix NL’s first few years of existence. Reasons for not using this strategy more recently could be that as a market leader for many years, they do not need to explain how they work anymore, and that due to

their increased amount of original content, they do not need to defend themselves for missing content anymore.

Not only did the statements that regarded Netflix NL as similar to traditional TV disappear in later years, statements emerged that explicitly differentiated the brand from traditional TV networks. This already started in 2015, when a television advertisement of Netflix NL mentioned in its description that the service works “zonder commercials of verplichtingen” [without commercials or obligations] (Netflix Nederland & België, 2015). In doing so, Netflix NL looked down on traditional, linear television, as they did have commercial breaks. This also relates to the previously discussed finding that Netflix NL markets itself as a leader of change, as providing content without commercials was still new in the Dutch media market at this time. The same emphasis on having no commercials is still evident on Netflix NL’s YouTube account today (Netflix Nederland & België, 2020). Today, content without commercials is not new anymore, but emphasizing this on their YouTube account makes sense considering that the platform YouTube itself does use advertisements. Reminding people on a platform with advertisements that Netflix functions without them emphasizes how Netflix NL has been a leader of change in the Dutch media market.

Furthermore, Joris Evers mentioned in 2015 regarding television experiences: “en dat is ook een van de redenen waarom wij denken dat internettelevisie de toekomst heeft, omdat dat soort beeldkwaliteit enkel via internet geleverd kan worden en niet via de standaard televisieuitzendingen” [and that is also one of the reasons why we think that internet television is the future, because that sort of image quality can only be delivered through the internet and not through standard television broadcasts] (Netflix-Nederland, 2015, para. 8). Here Evers explicitly notes that Netflix, as a provider of internet television, is qualitatively better than traditional television and therefore the future of TV. This highlights the positive aspects of Netflix NL as an innovative brand, so Netflix NL bases the differentiation from traditional TV forms on Netflix’s innovativeness. Netflix’s global brand uses this strategy as well (Wayne, 2018). The difference however is that Netflix NL as a local brand using this strategy means they indirectly attack old fashioned Dutch TV networks, whereas the global brand refers more generally to traditional television as a medium. The global brand may use this strategy aggressively (Wayne, 2018), but considering that Dutch TV networks are also exploring the opportunities of internet TV, the Dutch Netflix uses this strategy more to illustrate how they are leading the Dutch media landscape to another level.

4.4 Localization Activities

As expected in this research regarding Netflix's local brand in the Netherlands compared to its global brand, one of the main themes found in the data was 'localization activities'. This category holds statements or information regarding Netflix NL's localization activities in the Netherlands, including (future plans for) pricing, campaigns, content, strategies, promotions, products, or services. One subcategory found within this theme is 'promotion'. As mentioned in the theory section about the Dutch media landscape, until recently, Netflix NL gave new users the first month for free to try its service out (Wokke, 2020). The brand highlighted this promotion in items from the first three years since its expansion to the Netherlands. In a 2013 interview for example, Reed Hastings mentioned this promotion when explaining why illegal torrenting is no main threat: "and we let everybody try Netflix for free just by visiting Netflix.nl" (Tweakers, 2013). He thus speaks of this promotion as a positive aspect that makes the brand attractive for new subscribers. Similarly, in Netflix NL's 2013 television commercial they said: "Probeer ons nu 1 maand gratis" [Try us now, 1 month for free] and added in the description: "je kunt direct opzeggen" [you can cancel immediately] (Hewelt, 2013). By emphasizing how easy it is to try, without obligations, and how the service itself is easy to use, Netflix NL explains its brand identity as approachable. In 2014, Netflix NL even dedicated an entire instruction video on how to try Netflix for free. In this item, Netflix NL again emphasized that the service is easy to try: "registreer je voor de gratis proefperiode en krijg direct toegang" [register for the free trial period and get immediate access] (Netflix Nederland & België, 2014). This video also focused on the period after the free trial month: "Na je proefperiode betaal je, hoe vaak je ook kijkt, maar 1 laag maandbedrag" [After your trial period you pay, no matter how much you watch, only 1 low monthly amount] (Netflix Nederland & België, 2014). Netflix NL thus used the promotion to attract new subscribers, and they did this in a way that illustrated the brand identity as easy to try and use, as well as affordable. Considering that Netflix NL is the market leader, it is understandable that this promotion was only emphasized in the first few years and eventually lost its necessity. Netflix NL targeted the 'first month for free' promotion at people who did not have a subscription to the service yet. In later years, they focused their branding activities less on acquiring new members. This illustrates that Netflix NL adapts its local branding strategies over time, following what works to reach specific goals at a certain time.

Another subcategory in this theme was 'localized catalogue', which includes statements about how Netflix NL adapts the content they offer in their catalogue to the Dutch

audience. In a news article by De Volkskrant in 2013, Joris Evers mentioned the following: “Wat er te zien is, is in ieder land anders in verband met de tv-rechten die wij kopen, dus Nederland krijgt haar eigen catalogus” [What is on there, is different in every country due to TV-rights we buy, so the Netherlands will get their own catalogue] (Fontein, 2013, para. 4). Here, Joris Evers thus explicitly said that one of Netflix NL’s localization activities is adapting the Dutch catalogue to what is possible in the Netherlands. However, the context reveals that this relates more to regulation and rights, than to fulfilling audience-specific needs. Netflix NL therefore did not focus on gathering specific content that the Dutch audience would appreciate most when they entered the market; instead they focused on what content was possible for them to distribute here. A Quote news article from the same year mentioned the following regarding Reed Hastings: “Het bedrijf is volgens de man in onderhandeling met ‘alle relevante aanbieders van film en series’ in Nederland. En zou in de nabije toekomst meer Nederlands fabrikaat willen aanbieden” [The firm is, according to the man, under negotiation with ‘all relevant providers of film and series’ in the Netherlands. And would want to offer more Dutch productions in the near future] (De Meulder, 2013, para. 5). Knowing that Netflix NL has to deal with regulations and rights, again, the meaning of such a statement changes from fulfilling local needs to adapting to local regulatory forces. Nevertheless, these are localization activities focused on the Dutch market. Anne Koning as Senior Manager Social Media & Brand for Northern Europe also noted briefly in 2016 that Netflix’s local brands are responsible for their own catalogues (Schobben, 2016), and other issues regarding local content bring back the discussions from the ‘content’ section, of Netflix NL increasingly marketing itself as a high quality content producer for the global market.

Overall, Netflix NL did localize its catalogue, but not because this would fit the audience’s specific needs. Considering the ‘content’ discussion revealed that the Dutch do not necessarily long for Dutch content, localizing the catalogue only for regulatory and competitive reasons does not mean Netflix NL neglects its audience’s needs. On the contrary, Netflix NL emphasizes that the brand works hard to understand its audience and its needs. Anne Koning for example mentioned in 2016 that “in Nederland moesten we uitleggen dat ‘Netflix & chill’ niet letterlijk Netflix en chill betekent” [in the Netherlands we had to explain that ‘Netflix & chill’ does not literally mean Netflix and chill] (Schobben, 2016, para. 2). This illustrates that Netflix NL is aware that the Dutch audience differs from the American audience, and that they adapt to these local differences. In an interview in 2017, Anne Koning was more explicit about this issue by stating “Je moet in de huid van je publiek

kruipen” [You must crawl into the audience’s skin] (Van Den Brandhof, 2017, para. 1). By stating this, she indirectly argues that Netflix NL is a localized brand that keeps the audience’s needs in mind.

Director International Dubbing Debra Chinn gives an example of how Netflix NL localizes the products the service offers: international series and films. An interview in 2019 in De Volkskrant included the following statement:

Chinn: ‘Het voordeel van nasynchroniseren is dat je de kijker daarmee dichterbij de personages brengt. Maar we doen dat alleen in landen waar het publiek er behoefte aan heeft.’ In Nederland is het taboe, weet ze, daar is ondertiteling de norm. [Chinn: ‘The advantage of dubbing is that you bring the viewer closer to the characters. But we only do that in countries in which the audience has a need for it.’ In the Netherlands it is taboo, she knows, subtitles are the norm there.] (Van Dongen, 2019, para. 22)

In summary, Netflix NL knows that dubbing their content can have advantages, but not in the Netherlands so they choose to have subtitles here. In this specific example, it is clear that Netflix NL actively adapts its product for the local market, as well as that they are making the Dutch audience aware of their knowledge of their preferences. Since this example dates from 2019, it illustrates that understanding the local audience and adapting its products to this is something Netflix NL still values six years after they entered the market.

Netflix NL further mentioned localization activities in statements regarding future plans for the Dutch brand. Reed Hastings said in 2013 that during the first year in the Netherlands, the brand would focus on building a strong reputation and later on further expansion (Tweakers, 2013). This illustrates that Netflix NL uses local and global strategies separately yet intertwined with each other. They thus prioritize optimizing local strategies first. Expansion to other markets is part of Netflix US’s globalization strategies, yet the CEO still mentions this goal in an interview about the Dutch brand’s plans. Here it thus becomes clear that whilst building the local Dutch brand, Netflix NL considers future globalization plans. Furthermore, Anne Koning as Senior Manager Social Media & Brand for Northern Europe even explicitly mentioned that Netflix’s local brands must keep global strategies in mind (Schobben, 2016). With Netflix NL and Netflix US being two brands of the same firm, sharing the same brand name and associations of a global brand continuously expanding, there would of course be similar long-term goals and strategies. The theory section’s

discussion of this combination of localization and globalization together with these findings illustrate that Netflix NL is a clear example of a brand with glocalization strategies.

Local partnerships, like those found in previous research on Netflix's local brands, were evident in the Dutch case as well. For example, Anne Koning mentioned in 2016 that "Lokaal werken we met bureaus die schitterende contentcreaties voor het merk maken" [Locally we work with agencies that make splendid content creations for the brand] (Schobben, 2016, para. 3). By emphasizing their willingness to cooperate with local production companies or television networks, Netflix NL shows that the brand is adapting to the Dutch market. In addition, by doing so they give information about their brand identity as being flexible, adaptable, and willing to work with local parties. Daidj and Egert (2018) describe partnerships like these as co-opetition, a strategy discussed in the theory chapter. The Dutch and some other local Netflix brands use this strategy, but as Wayne (2018) noted, the global brand instead differentiates itself aggressively from TV networks. The European content quota of 30% obligates Netflix NL to include European content in its catalogue, which makes it a strategically smart move to create such local partnerships. Overall, Netflix NL's localization activities evolved from promotions and localizing the catalogue in the first years of their existence, to marketing that they understand the Dutch audience, creating local social media campaigns, and creating local partnerships in later years.

4.5 Performance

The main theme 'performance' consists of statements regarding the previous, current, or future (expected) performance of Netflix NL. This would include information about financial performance, number of subscribers, expansion, or competitive performance. This theme closely relates to competition, as well as to the global brand when it comes to expansion. In this research's data set, Netflix NL representatives promoted the brand as financially healthy and successful. Regarding performance, they only spoke of the brand's expectation of good performance, or of the brand's actual good performance. Units of analysis categorized in the subcategory 'expectance of good performance' all dated from 2013 around the time of Netflix's arrival in the Netherlands. A Quote news article included the following statement: "Na het VK en Scandinavië, is Nederland de logische volgende halte, vindt de CEO. 'Jullie zijn tech savy, iedereen heeft wel een tablet in huis en een breedbandverbinding. En Nederlanders proberen graag dingen uit'" [After the UK and Scandinavia, the Netherlands are the next logical stop, according to the CEO. 'You are tech savy, everyone has a tablet in

their house and broadband connection. And the Dutch like to try things' (De Meulder, 2013, para. 3). Hastings thus regarded entering the Dutch market as the logical next step due to a curious audience interested in technological innovations with good broadband connections. This illustrates an understanding of the audience, as was evident in the 'localization activities' theme. Marketing the expectance of good performance brings out a positive aspect of the brand; that of success, even before Netflix NL had actually reached this success. Furthermore, this radiates a certain level of confidence, and a link to the already successful global brand. This strategy could therefore attract new subscribers, which makes it a logical strategy at this time in which Netflix had only just entered the Dutch market.

The other subcategory, 'good performance', was visible in items from 2015, 2016, and 2020. This means that, according to Netflix NL, the expectance of good performance became reality in two years. Netflix's former Head of Communications of the EMEA region Joris Evers noted in 2016 how they successfully managed to be profitable in the Netherlands within two years: "We maken winst in Nederland" [We're making a profit in the Netherlands] (Sjouwerman, 2016, para. 1). By sharing positive financial results, Evers markets Netflix NL as successful. Other units revealed this strategy as well, like this example from 2015 in which Evers proudly speaks of when he notices Netflix's success in everyday life:

Als ik in een restaurantje zit en dan hoor ik soms iemand achter mij praten over Netflix, of iemand loopt in een parkeergarage die heeft het over Breaking Bad op Netflix, dan wat mij betreft is dat gewoon fantastisch mooi. Bijna net als in Amerika waar heel veel mensen Netflix hebben. [When I'm in a restaurant and then I sometimes hear someone behind me talking about Netflix, or someone walking in a parking garage talks about Breaking Bad on Netflix, then for me, that is just amazing. Almost like in America, where lots of people have Netflix.] (Draadbreuk, 2015, para. 7)

In this example Evers promotes the brand's success not by addressing financial profits, but by a personal story that illustrates how Netflix NL has become a popular conversation topic in subscribers' lives. Furthermore, he relates this success to the successful global US-based brand in a way that suggests Netflix NL is following this path and becoming equally popular. The portrayal of Netflix NL as successful is relatable to the competition theme, and to theories regarding brands and how consumers use them. As discussed in the theoretical

framework, brands help consumers make decisions and can link products or services to quality (Steenkamp, 2014). Netflix NL emphasizing its success could then cause consumers to link the brand to quality and choose, or continue to choose, its service over that of another brand. This would give Netflix NL an advantage over competition. Additionally, Netflix NL's success adds to the success of Netflix US's expansion and globalization efforts and to the quality and image of the global brand. Netflix NL has used this strategy of promoting the brand's successful performance since it entered the Dutch market, starting in 2013 with marketing expected good performance, and eventually marketing actual good performance. Additionally, the data set did not reveal Netflix NL ever mentioning less or disappointing performance, not even in the first two years when they were not yet profitable. This all clearly illustrates that Netflix NL focused on marketing the brand's good performance throughout the years. This is a logical strategy considering consumers use brands to make decisions (Blackett, 2009), and successful brands are the rational choice.

4.6 Competition

The theme 'competition' consists of a collection of statements or information regarding Netflix NL's competition or lack of competition. This includes legal and illegal entertainment networks, services, or other forms of competition in the Dutch media market. Even though Netflix NL is the market leader, they acknowledge different competitors. First of all, Netflix NL considered illegal forms of competition as no threat in 2013. CEO Reed Hastings discussed the issue of torrenting and acknowledges that this happens in the Netherlands as well as in the rest of the world:

Well there's certainly, there's some torrenting that goes on and that's true around the world, but some of that just creates the demand. Netflix is so much easier than torrenting, cause you don't have to deal with files, you don't have to download and move them around, you just click and watch, click and watch and so, it's so easy.
(Tweakers, 2013, para. 2)

By addressing how Netflix designed the innovative portal to be easy to use, he portrayed Netflix as the best choice for users. The brand therefore marketed itself as high quality, innovative, and user-friendly, and used this to explain why Netflix NL should not feel threatened by piracy. Two years later this situation had changed as Joris Evers gave a different message when discussing the illegal service Popcorntime:

Nouja, het is gewoon iets waar we heel erg bewust van zijn he, en piraterij blijft een van de grootste concurrenten en dat is het ook altijd geweest. En in Nederland zeker want daar is Popcorntime qua Google search volume, he, heel veel mensen zoeken ernaar op Google, naast Netflix. Dus in Nederland is men zich daar heel erg van bewust. Dus Popcorntime is een concurrent. [Well, it's just something we're very aware of, and piracy remains one of the biggest competitors and it has always been. And in the Netherlands for sure, because there, Popcorntime is, when it comes to Google search volume, uh, a lot of people search for it on Google, besides Netflix. So in the Netherlands people are very aware of that. So, Popcorntime is a competitor.] (Draadbreuk, 2015, para. 2)

Here, Evers portrays Popcorntime specifically as one of Netflix NL's main competitors. This illustrates that Netflix NL is actively keeping track of the changing Dutch media environment. Additionally, by addressing the issue of piracy, Netflix NL is indirectly portraying itself as a legal service and the better choice for consumers. The way Evers delivers this message, however, says something about how marketing can change over time. He speaks of piracy as something that Netflix has always had to fight, as if it has always been a threat to Netflix NL, just like Popcorntime is a threat in 2015. But as previously mentioned, in 2013, Hastings clearly had a different attitude towards the same topic of piracy (Tweakers, 2013). The context was different, so Netflix NL addressed the issue with a different attitude. By stating that piracy had always been a threat, and Popcorntime is just a current example of this, Joris Evers acknowledges that Popcorntime is a competitor, whilst he also softens this message. This way, illegal services are the threat, instead of just Popcorntime. In 2013, this was not an issue yet, so Hastings could use the topic of piracy to make Netflix come across even stronger. Items in the data set did not further discuss the issue of illegal competition, which suggests this was no longer an issue. Instead, other legal (S)VOD services followed as competition and later items included this topic.

Netflix NL acknowledges they have competition from local (S)VOD services, as numerous new portals have emerged since Netflix's arrival in the Netherlands. In 2013, they already saw that competition from other internet TV services was increasing: "Er komen meer partijen die het gaan aanbieden en bestaande partijen gaan meer aandacht besteden aan het platform internet" [there are more parties that are going to offer it, and existing parties are going to give more attention to internet as a platform] (Netflix-Nederland, 2015, para. 4). Netflix NL could therefore not completely lean on the portal-as-content and the portal-as-

brand strategy anymore, since local competitors offered similar services. Competition is mainly dangerous if they offer a better, more inclusive catalogue. This would explain why Netflix NL did continue to use the portal-as-content strategy, but added the producer-as-brand strategy as discussed in the content theme. Netflix NL holding the rights over their originally produced content differentiates them from other SVOD services, and made Netflix no longer one of many fighting the same ‘war for content’, as they create their own content. In the beginning, Netflix NL thus portrayed itself as a competitor for television, whereas more recently they are mainly competing with other (S)VOD services. Marketing itself as a producer of great content, whereas competitors still fight in the war for content, gives Netflix NL a competitive advantage.

4.7 Netflix in Social Life

The final theme found in the data set is ‘Netflix in social life’. This main category consists of statements or information regarding Netflix NL existing in, being visible in, or affecting social life and/or the quality of life of Dutch users. This theme includes potential mentioning of Netflix phenomena such as binge-watching, Netflix & chill, and Netflix-cheating. Analysis revealed three subcategories within this theme: ‘improving users’ lives’, ‘the Dutch are loyal viewers’, and ‘Netflix & chill’. In an advertisement video from 2015, Netflix NL marketed itself as a brand that improves users’ lives significantly. The advertisement exists of the following statements:

Kan een persoonlijke Netflix-aanbeveling iemands leven voorgoed veranderen? Kunnen chagrijnige tieners opgevrolijkt worden door een kippendans? Wordt dit kleine meisje een danskampioene dankzij de moves van koning Julien? En kunnen ongemakkelijke etentjes gered worden door een gedeelde liefde voor House of Cards? Ja! Ja! Ja! Ik hoop het! Ja! Absoluut. Mooie dingen, beginnen met Netflix. [Can a personalized Netflix-recommendation change someone’s life forever? Can grumpy teens be cheered up by a chicken dance? Will this little girl become a dance champion because of the moves of king Julien? And can awkward dinners be saved by a shared love for House of Cards? Yes! Yes! Yes! I hope so! Yes! Definitely. Great things, begin with Netflix.] (Netflix Nederland & België, 2015)

By including characters with different ages and interests in this advertisement, Netflix NL speaks to a large target audience and promises that great things start with Netflix for most

people instead of for a specific group. Netflix NL thus markets itself not just as important in some people's lives, but in most people's lives. The examples of the series they mention here, *King Julien* and *House of Cards*, are two of Netflix's Originals. They therefore use this strategy of Netflix NL as a life-improver together with references to Netflix as producers of great content, which differentiates them from other SVOD services. This example furthermore relates to personalized recommendations, since the advertisement suggests that the great content, offering something for every individual, can make people happy and inspired. By marketing Netflix NL as a brand that improves people's lives, they go a step further with the 'provider of great content' strategy and emphasize their brand equity. This advertisement dates from the year in which Netflix NL became profitable; when they had already grown popular, but as this example illustrates, were still invested in persuading possible customers. Referring to specific Netflix content, and to the impact Netflix can have on users' social lives as they do in this advertisement instead of explaining how the service works to the audience, illustrates Netflix NL's growth at that time.

Another item mentioned how in the Netherlands users 'cheat' less on Netflix than in America. They explained the Netflix phenomenon 'Netflix cheating' here, which refers to someone watching another episode of a series they usually watch with their partner, alone (Van Den Brandhof, 2017). By sharing this information, Netflix NL again shows that they understand the Dutch audience and their behaviors, which is relevant for localization activities. By explaining this phenomenon, Netflix NL tries to further infiltrate people's social lives, as this phenomenon is part of social life. One of the items from a year earlier also mentioned a Netflix phenomenon: Netflix & chill. Netflix's social media strategist Anne Koning said that this phenomenon had to be explained for the Dutch audience (Schobben, 2016). In doing so, she suggested that the Dutch are more naïve than Americans, but she also made clear how the brand helped the Dutch to embrace such phenomena in social life. Overall, this theme illustrates how Netflix NL is trying to infiltrate people's lives to make them better, and especially to guide them towards the idea that Netflix improves people's lives. Popularizing Netflix phenomena in particular is what gives the brand a competitive advantage, due to positive brand awareness and associations. Currently, these phenomena are common knowledge, making Netflix NL's attempts from 2016 and 2017 to infiltrate people's social lives successful. Netflix NL followed the global brand's lead regarding brand equity in social life, as Anne Koning revealed that the American audience had already accepted Netflix phenomena before the Dutch audience knew of them. The Dutch brand, however, waited with

this strategy until the audience was ready and acquainted with the service, which illustrates that Netflix NL adapted its strategies to the changing local audience.

Conclusion

This chapter discussed the results of thematically coding and analyzing the data set. It elaborated on the seven main themes in detail, and in relation to each other and the theories from the second chapter. Netflix NL's branding strategies consist of emphasizing its content, innovative character, relation to other entertainment forms, localization activities, performance, competition, and how it affects users' social lives. The results revealed that Netflix NL's branding strategies changed throughout the years, as the brand follows changing audience's needs and other changes in the Dutch media market. The most constant factor was the focus on content, which is also the main difference from Netflix's global brand. In the first years Netflix NL's portal-as-content strategy focused on promoting its catalogue to attract new subscribers, as well as defending itself from lacking certain content by addressing the 'war for content'. Later on they implemented the producer-as-brand strategy to promote that Netflix NL has access to original content of high quality, which gives them a competitive advantage over other SVOD services that still fight the 'war for content'. The local brand's use of the portal-as-content strategy is similar to that of other local brands, like Netflix Israel, but unlike Netflix's global strategies (Wayne, 2020). The focus on technological innovations, however, is similar to Netflix's global portal-as-brand strategy, but adapted in a less aggressive way towards TV networks. Overall, Netflix NL's branding strategies are part of a glocalization strategy, in which they implement localization activities while alignment with the global brand remains important. The main differences from Netflix's global brand were emphasizing Netflix NL's great content and the local partnerships.

5. Conclusion

This thesis researched the phenomena branding and localization in relation to Netflix's local brand in the Netherlands and its global US-based brand. The SVOD service expanded from the US to numerous countries around the world, making it an excellent example of a global brand in the global media market. Technological innovations made it possible for online services like Netflix to emerge, which changed the media landscape. Previous research on some of Netflix's local brands existed already, but for a more complete understanding of Netflix's branding operations in national markets in comparison to the global market, this research focused on the Dutch brand. Since for other local Netflix brands, like Netflix Israel (Wayne, 2018), researchers found localization strategies, this thesis expected the Dutch brand to differ in some way from Netflix US.

After a discussion of relevant theory and the Dutch context, thematic analysis of the data set followed. The results chapter discussed the seven themes that emerged: content, innovation, relation to other entertainment forms, localization activities, performance, competition, and Netflix in social life. Interpretation of these themes and their subcategories revealed Netflix NL's branding strategies and how they evolved from 2013 until 2020. This research found an answer to the research question by comparing these findings to previous research on Netflix's global brand. To repeat, this research's main question was:

RQ: "How does Netflix's brand in the Netherlands compare to its global US-based brand?"

Analysis of the seven themes revealed similarities as well as differences between the brands. Netflix NL, like the global brand, used a portal-as-brand strategy to identify its brand as technologically innovative and more user-friendly than traditional forms of television. Whereas Wayne (2018) found that Netflix US used this strategy to rather aggressively differentiate itself from TV networks, this thesis found that Netflix NL portrays itself more as a force that positively changes and innovates the Dutch media landscape. Unlike the global brand, Netflix NL even created partnerships with local TV networks. Furthermore, like Netflix US, the Dutch brand increasingly markets itself as a producer, but again adapted this strategy to the Dutch market. The strategy of emphasizing its great content, which Netflix has used since it entered the Dutch market, was visible in this new producer-as-brand strategy as well. As discussed in the results, this focus on content is the main difference between the two brands. Overall, the identity of the Dutch brand is less aggressive towards other providers of content than the global brand's identity, and more focused on the audience's need for great content. The findings suggest that Netflix NL uses its connection to the global brand to its

advantage. Namely, this connection to success, expansion, and the access to original content provides Netflix NL's identity with a solid base, which they adapt continuously to the changing Dutch media environment. Netflix NL's connection to the global market furthermore allows them to lean on high-quality standards when it comes to local productions; they use this as a reason for not immediately producing Dutch content, but only when an idea is good enough to be distributed in other markets as well. In turn, Netflix NL has access to content produced by other Netflix brands. Being able to provide the Dutch audience with the global brand's productions was especially an advantage for Netflix NL, as the Dutch appreciate content in English. However, Netflix NL itself has been increasingly successful as the Dutch market leader and less attached to Netflix US since producing its own original content for the international market. This makes that Netflix NL is becoming more identifiable as 'global' itself, while the brand continues to adapt to local needs. Netflix NL has grown from a side-brand of the global firm to a steady local brand leading the Dutch media market with global aspirations. Maintaining but adapting the portal-as-content strategy to the Dutch environment throughout the years is what made Netflix NL a strong individual brand – and it is with this strategy that Netflix NL separates itself from the global US-based brand.

Overall, Netflix NL used three relevant branding strategies over the last seven years: the portal-as-content strategy, the portal-as-brand strategy, and the producer-as-brand strategy. Understanding and adapting to the Dutch culture created differences from the global brand, as discussed above. Netflix NL used a unique combination of globalization and localization, to stay in line with global strategies as well as adapting to local needs and competition. This combination of localization and globalization illustrates the firm's glocalization strategy, as discussed in the theory section.

The theoretical framework served to provide a deeper understanding of several concepts and contexts related to Netflix NL and Netflix US. First of all, the discussion of brands, brand identity, branding, and brand equity provided a clarification of what is meant when speaking of Netflix NL and Netflix US as brands with certain identities and branding strategies. With these brands being the main topics of this research, these discussions were both necessary and relevant. Secondly, the theoretical discussion of television in transition, including concepts as digitalization, media convergence, and personalization helped to understand the context in which Netflix emerged as a global brand, and how the media landscape in which it exists is constantly changing. This theoretically embedded Netflix's brand identity as technologically innovative. Thirdly, the discussion of globalization and

localization as concepts and their relation to each other provided the necessary theoretical background for this thesis. When searching for and analysing localization strategies, it must be clear what is meant by localization, especially in the context of a global firm like Netflix. Fourthly, the discussion of Netflix's global brand provided the information needed to compare the findings regarding Netflix NL to Netflix's global branding strategies. Fifthly, previous research on Netflix's local brands provided as examples on localization strategies and findings were compared to them. Additionally, since this thesis served to get a more complete understanding of Netflix's localization strategies, this section on Netflix in national markets proved useful. Finally, the theory section regarding the Dutch media landscape provided information needed about the context in which Netflix NL operates, to explain the findings within this context. Overall, the theoretical framework proved suitable for this research.

This thesis used thematic content analysis with a grounded theory approach. Due to its systematic nature, this method allowed for the data to be ordered and categorized in a way that was most useful to find an answer to the research question. Units of analysis that were possibly useful for this research were coded and analysed, whereas remaining, irrelevant text could be left out of analysis. The research was therefore more focused, which made it easier to subtract theory from the data. Furthermore, this method allowed for the material's context to be included, which made coding and analysing even more focused. The initial coding was useful as it revealed already six of the seven main themes. The final coding followed naturally from this and easily assigned units of analysis to the six existing themes, and to the one new theme. Theory was derived from the data, and the research question was answered, making the choice of method appropriate for this research.

Although the method proved suitable, there were some limitations to the chosen approach. First of all, the data set was of limited size. Due to the method's time-consuming thoroughness in coding and analysis, the data collection process ended when new items were difficult to be found and no new relevant themes seemed to exist. Ideally, all existing items would be added to the data set, or collection would go on until no new information existed. The selection of data used in this research is therefore a limitation. Furthermore, thematic content analysis is a subjective method, making reliability difficult to ensure. It is possible that other researchers would code and analyse differently, even though the found themes were considered appropriate for this research.

Further research on this topic of Netflix's local strategies in relation to its global strategies is desirable. The knowledge on this topic must be extended by researching more of

Netflix's local brands and by keeping track of changes (Global Internet TV Consortium, n.d.). Research on competitors' branding activities, like that of Disney+ and Videoland, would be desirable to deepen the understanding of SVOD services in the Dutch market and how they promote their brand identities. Furthermore, with social media being a popular branding outlet, future research could collect data from Netflix's or another SVOD service's social media posts. Overall, this thesis contributed to filling the gap in academic literature, but much more research is necessary to fill it completely.

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Appendix A

Initial Coding Frame

CATEGORY	SUB CATEGORY	NO. OF UNITS OF ANALYSIS	TOTAL	SPECIFIC UNITS OF ANALYSIS	EXAMPLE
CONTENT	Local originals for global market	5	22	<p><i>Item 1 (2019):</i> Unit 1 Unit 3 Unit 5 Unit 7</p> <p><i>Item 5 (2018):</i> Unit 19</p>	<p>“Een verhaal uit zo’n land moet wel een breder, internationaal publiek aanspreken. <i>A good story travels</i>. Onze abonnees komen overal vandaan, maar ze hebben meer gemeen dan je denkt.”</p> <p>[A story from such a country must speak to a broader, more international audience. <i>A good story travels</i>. Our subscribers are from everywhere, but they have more in common than you think.]</p>
	Investments in productions	2		<p><i>Item 1 (2019):</i> Unit 6</p> <p><i>Item 5 (2018):</i> Unit 18</p>	<p>“Bijkomend voordeel: hogere budgetten. ‘Bij <i>Undercover</i> is er geen moment geweest dat iemand zei: nee, daar is geen geld voor’, zegt Moolenaar.”</p> <p>[Additional advantage: higher budgets. ‘With <i>Undercover</i> at no moment someone said: no, there is no money for that’, says Moolenaar.]</p>
	Dutch original	1		<p><i>Item 5 (2018):</i> Unit 17</p>	<p>“Er komt een Nederlandse original aan. We zijn ermee bezig”</p> <p>[There is a new Dutch original coming. We’re working on it]</p>
	War for content	4		<p><i>Item 4 (2013):</i> Unit 14 Unit 15</p> <p><i>Item 6 (2013):</i> Unit 24 Unit 31</p>	<p>“We have to compete for shows with RTL, HBO, and if they win, then they block us from it so it’s exclusive licensing.”</p>
	Provider of great content	7		<p><i>Item 6 (2013):</i> Unit 27 Unit 30 Unit 32 Unit 33 Unit 34 Unit 40 Unit 42</p>	<p>“You know, we have great content. Frankly we have so much content you can never watch it all. So you know we got a lot there. It’s just amazing shows.”</p>
	Netflix as content producer	3		<p><i>Item 5 (2018):</i> Unit 17</p>	<p>“Er komt een Nederlandse original aan. We zijn ermee bezig”</p>

				Unit 18 Unit 19	[There is a new Dutch original coming. We're working on it]
INNOVATION	Easy to use	2	5	<i>Item 6</i> (2013): Unit 22 Unit 23	“Well there’s certainly, there’s some torrenting that goes on and that’s true around the world, but some of that just creates the demand. Netflix is so much easier than torrenting, cause you don’t have to deal with files, you don’t have to download and move them around, you just click and watch, click and watch and so, it’s so easy.”
	Low price high quality	2		<i>Item 6</i> (2013): Unit 25 Unit 41	“We’re unlimited watching for a low price”
	Accessible on many devices	1		<i>Item 6</i> (2013): Unit 36	“So, Netflix can be used on almost any device, uhm, so, a phone, a smartphone, an I-pad, uhm. A PS3, a Smart TV, an Apple TV, and we’re always adding more devices.”
RELATION TO OTHER ENTERTAINMENT FORMS	Like traditional TV networks	3	4	<i>Item 4</i> (2013): Unit 15 <i>Item 6</i> (2013): Unit 26 Unit 35	“Je moet ons zien als een lokale zender. Andere zenders hebben contracten met film- en serie-aanbieders en als dat zo is, kunnen wij een bepaalde serie, of de meest recente afleveringen nog niet aanbieden.” [You should see us as a local channel. Other channels have contracts with providers of films and series, and if they do, we can’t offer a certain series, or the most recent episode yet.]
	Different from cinema	1		<i>Item 6</i> (2013): Unit 29	“No that’s not. That’s much more of a social experience, going to the cinema and seeing a movie.”
LOCALIZATION ACTIVITIES	Subtitles over dubbing	1	7	<i>Item 1</i> (2019): Unit 4	“Chinn: ‘Het voordeel van nasynchroniseren is dat je de kijker daarmee dichterbij de personages brengt. Maar we doen dat alleen in landen waar het publiek er behoefte aan heeft.’ In Nederland is het taboe, weet ze, daar is ondertiteling de norm.” [Chinn: ‘The advantage of dubbing is that you bring the viewer closer to the characters. But we only do that in countries in which the audience has a need for it.’ In the Netherlands it is taboo, she knows, subtitles are the norm there.]
	Localized catalogue	2		<i>Item 2</i> (2013): Unit 9	“Wat er te zien is, is in ieder land anders in verband met de tv-rechten die wij kopen, dus

				<i>Item 4 (2013):</i> Unit 16	Nederland krijgt haar eigen catalogus” [What is on there, is different in every country due to TV rights we buy, so the Netherlands will get their own catalogue]
	Promotion	1		<i>Item 6 (2013):</i> Unit 23	“And we let everybody try Netflix for free just by visiting Netflix.nl.”
	First year plans	1		<i>Item 6 (2013):</i> Unit 37	“Well, in the first year we’re very focused just on reputation, that the people who use us love us, that the streaming works really well, that it’s a high definition picture, that the customer support is good, the billing is perfect.”
	Future plans	2		<i>Item 6 (2013):</i> Unit 38 Unit 39	“Uh, and then in the future years of course we do want to expand.”
PERFORMANCE	Expectation of good performance	5	7	<i>Item 4 (2013):</i> Unit 12 <i>Item 6 (2013):</i> Unit 20 Unit 21 Unit 38 Unit 39	“Na het VK en Scandinavië, is Nederland de logische volgende halte, vindt de CEO. ‘Jullie zijn tech savvy, iedereen heeft wel een tablet in huis en een breedbandverbinding. En Nederlanders proberen graag dingen uit.’” [After the UK and Scandinavia, the Netherlands are the next logical stop, according to the CEO. ‘You are tech savvy, everyone has a tablet in their house and broadband connection. And the Dutch like to try things.’]
	Good performance	2		<i>Item 3 (2016):</i> Unit 10 Unit 11	“Netflix-topman Joris Evers: ‘we maken winst in Nederland’” [Netflix top man Joris Evers: ‘we’re making a profit in the Netherlands’]
COMPETITION	Piracy: no threat	1	5	<i>Item 6 (2013):</i> Unit 22	“Well there’s certainly, there’s some torrenting that goes on and that’s true around the world, but some of that just creates the demand. Netflix is so much easier than torrenting, cause you don’t have to deal with files, you don’t have to download and move them around, you just click and watch, click and watch and so, it’s so easy.”
	Other entertainment forms	1		<i>Item 6 (2013):</i> Unit 28	“Well that’ll be two of the main competitors, but in general it’s all the ways that you spend time.”

	Local (S)VOD services	2	<i>Item 6 (2013):</i> Unit 24 Unit 31	“It’s always with Netflix, uh, people want us to have everything and we want to have everything. But the problem is that RTL and HBO, they block us from having everything.”
	Local TV networks	1	<i>Item 4 (2013):</i> Unit 15	“Je moet ons zien als een lokale zender. Andere zenders hebben contracten met film- en serie-aanbieders en als dat zo is, kunnen wij een bepaalde serie, of de meest recente afleveringen nog niet aanbieden.” [You should see us as a local channel. Other channels have contracts with providers of films and series, and if they do, we can’t offer a certain series, or the most recent episode yet.]

Final Coding Frame

CATEGORY	SUB CATEGORY	NO. OF UNITS OF ANALYSIS	TOTAL	SPECIFIC UNITS OF ANALYSIS	EXAMPLE
CONTENT	Local originals for global market	6	46	<p><i>Item 1 (2019):</i> Unit 1 Unit 3 Unit 5 Unit 7</p> <p><i>Item 5 (2018):</i> Unit 19</p> <p><i>Item 18 (2015):</i> Unit 146</p>	<p>“Een verhaal uit zo’n land moet wel een breder, internationaal publiek aanspreken. <i>A good story travels</i>. Onze abonnees komen overal vandaan, maar ze hebben meer gemeen dan je denkt.”</p> <p>[A story from such a country must speak to a broader, more international audience. <i>A good story travels</i>. Our subscribers are from everywhere, but they have more in common than you think.]</p>
	Investments in productions	3		<p><i>Item 1 (2019):</i> Unit 6</p> <p><i>Item 5 (2018):</i> Unit 18</p> <p><i>Item 17 (2016):</i> Unit 135</p>	<p>“Volgens Goss, die <i>Vice President Originals</i> is, is het streamingbedrijf de grootste investeerder in de productie. Hoeveel het bedrijf investeert en waar de serie over gaat wil ze nog niet bekendmaken.”</p> <p>[According to Goss, who is <i>Vice President Originals</i>, the streaming service is the biggest investor in the production. How much the company is investing and what the series is about, she doesn’t want to reveal yet.]</p>
	Dutch original	1		<p><i>Item 5 (2018):</i> Unit 17</p>	<p>“Er komt een Nederlandse original aan. We zijn ermee bezig”</p> <p>[There is a new Dutch original coming. We’re working on it]</p>
	War for content	4		<p><i>Item 4 (2013):</i> Unit 14 Unit 15</p> <p><i>Item 6 (2013):</i> Unit 24 Unit 31</p>	<p>“We have to compete for shows with RTL, HBO, and if they win, then they block us from it so it’s exclusive licensing.”</p>
	Provider of great content	24		<p><i>Item 6 (2013):</i> Unit 27 Unit 30 Unit 32 Unit 33 Unit 34</p>	<p>“You know, we have great content. Frankly we have so much content you can never watch it all. So you know we got a lot there. It’s just amazing shows.”</p>

			<p>Unit 40 Unit 42</p> <p><i>Item 7</i> (2020): Unit 43 Unit 45 Unit 47</p> <p><i>Item 10</i> (2013): Unit 55 Unit 56 Unit 58 Unit 59 Unit 62 Unit 65 Unit 68</p> <p><i>Item 12</i> (2014): Unit 83 Unit 88</p> <p><i>Item 13</i> (2014): Unit 92 Unit 99 Unit 105</p> <p><i>Item 14</i> (2014): Unit 113</p> <p><i>Item 15</i> (2020): Unit 120</p>	
Netflix as content producer	6	<p><i>Item 5</i> (2018): Unit 17 Unit 18 Unit 19</p> <p><i>Item 6</i> (2013): Unit 33</p> <p><i>Item 15</i> (2020): Unit 119</p> <p><i>Item 19</i> (2020): Unit 147</p>	<p>“Netflix wil nog steeds in gesprek met de NPO over het maken van vijf tv-series. Dat zei Janneke Sloëtjes, directeur publieksbeleid bij Netflix, in een gesprek met de Tweede Kamer.”</p> <p>[Netflix still wants to talk to the NPO about making five tv series. That is what Janneke Sloëtjes, public policy director, said, in a conversation with the House of Representatives.]</p>	
Popular international content	1	<p><i>Item 19</i> (2020): Unit 149</p>	<p>“Daarbij is het een belangrijke factor dat wij het prima vinden om internationale content te streamen. In het Engels dus. Daarom heeft Netflix ervoor gekozen om eerst in landen series en films te laten maken waar abonnees meer waarde hechten aan content in hun eigen taal.”</p>	

					[Besides, an important factor is that we are fine with streaming international content. In English. Therefore, Netflix has chosen to first produce series and films in countries in which subscribers attach more value to content in their own language.]
	Against strong content regulations	1		<i>Item 19 (2020):</i> Unit 151	“Zij ziet als groot gevaar dat er uiteindelijk veel geld beschikbaar zal zijn voor Nederlandse producties, maar er geen mogelijkheid is om content van een adequaat niveau te maken.”
					[She sees it as a great danger that eventually a large amount of money for Dutch productions would be available, yet the possibility to create content of an adequate level would not.]
INNOVATION	Easy to use	15	53	<i>Item 6 (2013):</i> Unit 22 Unit 23 <i>Item 9 (2015):</i> Unit 53 <i>Item 12 (2014):</i> Unit 80 Unit 85 Unit 87 <i>Item 13 (2014):</i> Unit 92 Unit 94 Unit 100 Unit 103 Unit 104 <i>Item 14 (2014):</i> Unit 107 Unit 114 Unit 116 Unit 118	“heel makkelijk te gebruiken” [very easy to use]
	Low price high quality	6		<i>Item 6 (2013):</i> Unit 25 Unit 41 <i>Item 9 (2015):</i> Unit 52	“We’re unlimited watching for a low price”

			<p><i>Item 10</i> (2013): Unit 63</p> <p><i>Item 11</i> (2015): Unit 76</p> <p><i>Item 13</i> (2014): Unit 98</p>	
Accessible on many devices	15		<p><i>Item 6</i> (2013): Unit 36</p> <p><i>Item 7</i> (2020): Unit 44</p> <p><i>Item 10</i> (2013): Unit 66</p> <p><i>Item 11</i> (2015): Unit 74</p> <p><i>Item 12</i> (2014): Unit 79 Unit 81 Unit 84 Unit 88</p> <p><i>Item 14</i> (2014): Unit 106 Unit 108 Unit 109 Unit 111 Unit 112 Unit 115 Unit 117</p>	<p>“So, Netflix can be used on almost any device, uhm, so, a phone, a smartphone, an I-pad, uhm. A PS3, a Smart TV, an Apple TV, and we’re always adding more devices.”</p>
New experience	4		<p><i>Item 10</i> (2013): Unit 57 Unit 60 Unit 61</p> <p><i>Item 18</i> (2015): Unit 141</p>	<p>“All you can discover”</p>
Personalized recommendations	2		<p><i>Item 11</i> (2015): Unit 69</p> <p><i>Item 12</i> (2014): Unit 86</p>	<p>“Het is slim”</p> <p>[It’s smart]</p>
Online television	8		<p><i>Item 11</i> (2015):</p>	<p>“Kijk nu op netflix.nl”</p>

				Unit 72 Unit 78 [Watch now on netflix.nl] <i>Item 12</i> (2014): Unit 82 <i>Item 13</i> (2014): Unit 93 <i>Item 14</i> (2014): Unit 110 <i>Item 18</i> (2015): Unit 139 Unit 140 Unit 145
	Room for creative experimentation	1		<i>Item 16</i> (2017): Unit 128 “Er is veel ruimte voor creativiteit, dus die ruimte moet je nemen. Experimenteren hoort daarbij. Bij Netflix is die ruimte er, hoewel natuurlijk tot op zekere hoogte.” [There is a lot of room for creativity, so you have to take that chance. Experimenting is part of that. At Netflix, the room is there, although, of course, to a certain extent.]
	Future innovation	2		<i>Item 18</i> (2015): Unit 143 Unit 144 “Het is wel heel spannend he. Is de toekomst met die grote brillen, zoals Oculus Rift. Is dat dan een heel andere ervaring? Wie weet. Bij ons in Los Gatos (hoofdkantoor, red.) zijn er al engineers mee aan het spelen om te kijken of als je Netflix in zo’n bril doet of dat wat is.” [It is very exciting right. Is the future, with those big glasses, like Oculus Rift. Is that a whole different experience then? Who knows. With us, in Los Gatos (headquarters, ed.) there are already engineers playing to see if Netflix with such glasses would work]
RELATION TO OTHER ENTERTAINMENT FORMS	Like traditional TV networks	5	9	<i>Item 4</i> (2013): Unit 15 <i>Item 6</i> (2013): Unit 26 “Je moet ons zien als een lokale zender. Andere zenders hebben contracten met film- en serie-aanbieders en als dat zo is, kunnen wij een bepaalde serie, of de meest recente afleveringen nog niet aanbieden.”

				Unit 35	
				<i>Item 9</i> (2015): Unit 50	[You should see us as a local channel. Other channels have contracts with providers of films and series, and if they do, we can't offer a certain series, or the most recent episode yet.]
				<i>Item 18</i> (2015): Unit 142	
	Different from cinema	1		<i>Item 6</i> (2013): Unit 29	"No that's not. That's much more of a social experience, going to the cinema and seeing a movie."
	Unlike traditional TV networks	3		<i>Item 7</i> (2020): Unit 46	"zonder reclame-onderbrekingen"
				<i>Item 11</i> (2015): Unit 75	[without commercial-interruptions]
				<i>Item 18</i> (2015): Unit 145	
LOCALIZATION ACTIVITIES	Subtitles over dubbing	1	40	<i>Item 1</i> (2019): Unit 4	"Chinn: 'Het voordeel van nasynchroniseren is dat je de kijker daarmee dichterbij de personages brengt. Maar we doen dat alleen in landen waar het publiek er behoefte aan heeft.' In Nederland is het taboe, weet ze, daar is ondertiteling de norm."
					[Chinn: 'The advantage of dubbing is that you bring the viewer closer to the characters. But we only do that in countries in which the audience has a need for it.' In the Netherlands it is taboo, she knows, subtitles are the norm there.]
	Localized catalogue	3		<i>Item 2</i> (2013): Unit 9	"Wat er te zien is, is in ieder land anders in verband met de tv-rechten die wij kopen, dus Nederland krijgt haar eigen catalogus"
				<i>Item 4</i> (2013): Unit 16	
				<i>Item 17</i> (2016): Unit 133	[What is on there, is different in every country due to TV rights we buy, so the Netherlands will get their own catalogue]
	Promotion	13		<i>Item 6</i> (2013): Unit 23	"And we let everybody try Netflix for free just by visiting Netflix.nl."
				<i>Item 10</i> (2013):	

			Unit 64 Unit 67	
			<i>Item 11</i> (2015): Unit 71 Unit 77	
			<i>Item 13</i> (2014): Unit 89 Unit 90 Unit 91 Unit 95 Unit 96 Unit 97 Unit 101 Unit 102	
	Understand audience	5	<i>Item 16</i> (2017): Unit 121 Unit 123 Unit 127 Unit 129	“Je moet in de huid van je publiek kruipen” [You must crawl into the audience’s skin]
			<i>Item 17</i> (2016): Unit 132	
	First year plans	1	<i>Item 6</i> (2013): Unit 37	“Well, in the first year we’re very focused just on reputation, that the people who use us love us, that the streaming works really well, that it’s a high definition picture, that the customer support is good, the billing is perfect.”
	Future plans	3	<i>Item 6</i> (2013): Unit 38 Unit 39	“Uh, and then in the future years of course we do want to expand.”
			<i>Item 8</i> (2015): Unit 48	
	Local partnerships	5	<i>Item 15</i> (2020): Unit 119 Unit 120	“Lokaal werken we met bureaus die schitterende contentcreaties voor het merk maken.”
			<i>Item 17</i> (2016): Unit 135 Unit 136	[Locally we work with agencies that make splendid content creations for the brand.]
			<i>Item 19</i> (2020): Unit 147	
	Local social media campaign	5	<i>Item 16</i> (2017): Unit 122 Unit 125 Unit 126	“Maar waar het in mijn werk om gaat, is vooral om campagnes lokale relevantie te geven. Dus contextueel inspelen op wat er hier gebeurt, zoals de campagne van House of Cards tijdens de

				<p><i>Item 17 (2016):</i> Unit 137 Unit 138</p> <p>verkiezingen, waarbij Frank Underwood twitterde naar Nederlandse politici.”</p> <p>[But what my job is about, is giving campaigns local relevance. So, anticipate the context and what is happening here, like the House of Cards campaign during the elections, in which Frank Underwood twittered to Dutch politicians.]</p>
	In line with global strategies	1		<p><i>Item 17 (2016):</i> Unit 131</p> <p>“maar wel in lijn blijven met de strategie van Netflix wereldwijd”</p> <p>[but staying in line with Netflix’s worldwide strategy]</p>
	Designing local branding strategies	2		<p><i>Item 17 (2016):</i> Unit 130 Unit 134</p> <p>“de strategieën moesten per land worden uitgewerkt”</p> <p>[the strategies needed to be worked out per country]</p>
	Investing in local market	1		<p><i>Item 19 (2020):</i> Unit 150</p> <p>“Sloëtjes geeft namens Netflix aan dat de streamingdienst een voorstander is van dergelijke maatregelen, maar dat het percentage aan de hoge kant is.”</p> <p>[Sloëtjes declares on behalf of Netflix that the streaming service is an advocate of such measures, but that the percentage is on the high side.]</p>
PERFORMANCE	Expectation of good performance	5	9	<p><i>Item 4 (2013):</i> Unit 12</p> <p><i>Item 6 (2013):</i> Unit 20 Unit 21 Unit 38 Unit 39</p> <p>“Na het VK en Scandinavië, is Nederland de logische volgende halte, vindt de CEO. ‘Jullie zijn <i>tech savy</i>, iedereen heeft wel een tablet in huis en een breedbandverbinding. En Nederlanders proberen graag dingen uit.’”</p> <p>[After the UK and Scandinavia, the Netherlands are the next logical stop, according to the CEO. ‘You are tech savy, everyone has a tablet in their house and broadband connection. And the Dutch like to try things.’]</p>
	Good performance	4		<p><i>Item 3 (2016):</i></p> <p>“Netflix-topman Joris Evers: ‘we maken winst in Nederland’”</p>

				Unit 10 Unit 11	
				<i>Item 9</i> (2015): Unit 54	[Netflix top man Joris Evers: 'We're making a profit in the Netherlands']
				<i>Item 19</i> (2020): Unit 148	
COMPETITION	Piracy: no threat	1	9	<i>Item 6</i> (2013): Unit 22	"Well there's certainly, there's some torrenting that goes on and that's true around the world, but some of that just creates the demand. Netflix is so much easier than torrenting, cause you don't have to deal with files, you don't have to download and move them around, you just click and watch, click and watch and so, it's so easy."
	Piracy: serious competition	2		<i>Item 9</i> (2015): Unit 49 Unit 51	"Nouja, het is gewoon iets waar we heel erg bewust van zijn he, en piraterij blijft een van de grootste concurrenten en dat is het ook altijd geweest. En in Nederland zeker want daar is Popcorntime qua Google search volume, he, heel veel mensen zoeken ernaar op Google, naast Netflix. Dus in Nederland is men zich daar heel erg van bewust. Dus Popcorntime is een concurrent."
	Other entertainment forms	1		<i>Item 6</i> (2013): Unit 28	"Well that'll be two of the main competitors, but in general it's all the ways that you spend time."
	Local (S)VOD services	5		<i>Item 6</i> (2013): Unit 24 Unit 31	"Er komen meer partijen die het gaan aanbieden en bestaande partijen gaan meer aandacht bieden aan het platform internet"
				<i>Item 18</i> (2015): Unit 140 Unit 141 Unit 142	[There are more parties that are going to offer it, and existing parties are going to give more attention to internet as a platform]

NETFLIX IN SOCIAL LIFE	Improving users' lives	3	5	<p><i>Item 11 (2015):</i> Unit 69 Unit 70 Unit 73</p>	<p>“Kunnen chagrijnige tieners opgevrolijkt worden door een kippendans? Wordt dit kleine meisje een danskampioene dankzij de moves van koning Julien? En kunnen ongemakkelijke etentjes gered worden door een gedeelde liefde voor House of Cards? Ja! Ja! Ja! Ik hoop het! Ja! Absoluut. Mooie dingen, beginnen met Netflix.”</p> <p>[Can grumpy teens be cheered up by a chicken dance? Will this little girl become a dance champion because of the moves of king Julien? And can awkward dinners be saved by a shared love for House of Cards? Yes! Yes! Yes! I hope so! Yes! Definitely. Great things, begin with Netflix.]</p>
	The Dutch are loyal viewers	1		<p><i>Item 16 (2017):</i> Unit 124</p>	<p>“Een grappig verschil tussen Amerika en Nederland is dat in Amerika Netflix cheating (stiekem volgende aflevering kijken zonder je partner, red.) veel meer voorkomt. Nederlanders zijn heel loyale kijkers.”</p> <p>[A funny difference between America and the Netherlands is that in America, Netflix cheating (secretly watching the next episode without your partner, ed.) is way more common. The Dutch are very loyal viewers.]</p>
	Netflix & chill	1		<p><i>Item 17 (2016):</i> Unit 132</p>	<p>“In Nederland moesten we uitleggen dat ‘Netflix & chill’ niet letterlijk Netflix en chill betekent.”</p> <p>[In the Netherlands we had to explain that ‘Netflix & chill’ doesn’t literally mean Netflix and chill.]</p>