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Netflix fictional feature film originals: an analysis of release strategies

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Abstract
This article offers an analysis of the strategies behind the release of original Netflix fictional feature films. Even if there is an already extensive literature about the streaming giant, little academic attention has been devoted to the release strategies of feature film originals and its implications for film production and distribution. With this goal in mind, we have built a database of titles identifiable as original Netflix features between 2015 and 2018 (n=171), considering theatrical exhibition, festival presence, language, genre, release territories and involvement in production. We have contrasted this macro-level approach with a more micro-level analysis through specific case-examples, in order to consider the case-by-case particularities of the film industry. Per our results, (a) Netflix has combined consistent release methods with some contingent experiments based on trial and error; (b) the unfolding of these strategies is related to the company's transnational identity and to the (c) goal of recognition according to established quality standards, like top film festivals or prestigious awards. Furthermore, the observed tendency towards capillary collaboration with local agents points to more potential diversity of catalogue titles and in some cases a greater international exposure of non-English speaking titles, even if circumscribed to popular genres like science-fiction, thriller or horror.

Keywords
Netflix, OTT, feature film, transnationality, film distribution.

1. Introduction

The ways in which Netflix releases its original feature films have stirred heated debates about contemporary film consumption, particularly in relation to the windowing system of exploitation; a changing, even if also a long-standing fixture of feature film distribution (Kehoe & Mateer, 2015). We can find some examples in the open feuds between Netflix and theatrical exhibitors or the controversies surrounding the eligibility of Netflix features for film festivals and awards, as evidenced in the latest editions of the Cannes Film Festival or the Academy Awards (Thompson, 2017; Newbould, 2019). Two major issues concur: the limited –if any– theatrical exhibition before availability in the platform (undermining anything resembling a standard delay between theatrical and video-on-demand exhibition windows) and the gated system behind Netflix film originals. Many originals become available for streaming only through the platform and it is not possible to establish a comparative analysis regarding something akin to a 'box-office' performance, as Netflix is very secretive and discretional about specific consumption data.

In an increasingly competitive environment, with more and more Over-The-Top (OTT) platforms trying to replicate the model based on exclusive content, be it TV or film-related, the notion of 'original' has acquired further relevance. And yet, there are very few analyses of feature film originals. It has been stated that Netflix has tried to establish a film strategy based on Day&Date (also known as D&D), consisting on simultaneous release in cinemas and/ or home video or streaming, which has been met with a hostile reaction, particularly among distributors and exhibitors (Cunningham, 2015), or direct to stream releases. It is argued that the related backlash might have forced the company to adopt new strategies like limited theatrical runs and a turn towards art-house films. However, our preliminary observations hinted at a more complex and evolving picture, which would point to different factors, like key target territories (often, but not always, defined by language) or genre. Furthermore, there is not a clear-cut definition of what a Netflix original is, and it has become an umbrella term that covers very different situations, ranging from acquisition to co-production, or from global releases to narrowly marketed products for specific territories as previously noted by authors such as Lotz and Havens (2016) and Wayne (2017).

2. Objectives and methodology

Considering Netflix as one of the most significant actors in current global online entertainment (Cunningham & Craig, 2016), the main objective of this article is to analyse the strategies behind the release of the company's fictional feature film originals, and what they mean in the context of contemporary film production and distribution. In order to frame our object of study, we first need to characterize what we will understand as an original Netflix feature film in the context of this article. Then, we identify those fictional feature films (live action and animation) that qualify as Netflix originals as a global category. For our analysis, it is not enough that a title is presented as a Netflix original in just a few territories, and therefore we have considered only those released as such in all territories or, at least, in all territories but a few exceptions (according to IMDBPro data). We have selected titles released between 2015, when the first original Netflix feature film, *Beasts of no nation*, was premiered, to 2018, that can be considered the year of consolidation for Netflix film originals. 2018 was characterized by a major diversity and an increasing number of titles, with one of them, *Roma*, having major exposure in an A-List Film Festival, Venice, and ten Oscar Nominations. This selection, starting in January of 2015 and ending in December of 2018, constitutes our sample (n=171). As previously stated, in this article we have opted not to consider documentaries, albeit being a significant category among Netflix originals, according to Follows (2017), as they correspond to different production and marketing logics.

Then we have characterized Netflix feature film originals according to release strategies. Thus, we have gathered data for each title regarding:

- Year of release.
- Main genre.
- Main language.
- Theatrical exhibition, where applicable, and correlation between theatrical exhibition and streaming release: simultaneous release (D&D), advanced release (before streaming date) or release after streaming premiere. In all cases, we also considered the window –measured in weeks– between the first commercial exhibition and streaming releases.
- Festival exhibition, where applicable, considering the window –measured in weeks– between first Festival exhibition and streaming release.

- Netflix production credit: here we considered whether the company (or a company executive) is explicitly mentioned in production credits, pointing to an involvement beyond acquisition of distribution rights.
- Typology of original regarding the kind of deal with production companies, where identifiable. Here, we have tried to differentiate between development deals (when Netflix commissions content or buys rights for titles in early stages of development, be it in individual cases or as a part of a multi-title package) and acquisitions (when Netflix buys already completed titles, usually at Festivals).
- Degree of exclusivity of distribution rights.
- Scope of the 'Netflix original' label (global or global with specific exceptions. We have discarded titles labelled as originals in just a few territories).

The dataset has been built considering and contrasting different documental sources, including official information from Netflix, Wikipedia and film databases like Allmovie or IMDB, complemented with specialized industry sources to identify acquisitions in top international Festivals[1].

Analysis has been structured to give answer to the following research questions:

RQ1. What are the particularities of Netflix fictional feature film originals?

RQ2. Which are the key release strategies carried out by Netflix in relation to fictional feature film originals and which factors contribute to its adoption?

RQ3. What has been the evolution of Netflix release strategies regarding fictional feature film originals?

3. What makes for a Netflix Original?

The nature of what a Netflix original is can be confusing (Follows, 2017; Rodriguez, 2019), which is coherent with the fact that Netflix as a brand tends to avoid clear-cut definitions:

> As Netflix now tries to take over the world, the matter appears to be settled once and for all: Netflix shows don't have a "brand"–and that's very much intentional. Netflix is the world's chameleonic TV channel. It wants to be everything to everyone (Epstein, 2016).

However, as Lotz and Havens explain (2016), Netflix began to use the term "Netflix original" as part of its marketing strategy, applying that category to those shows to which they held exclusive rights in a certain territory:

> Netflix's marketers have added to the challenge with its liberal use of the term "original" in marketing, typically marketing any show it has exclusive rights to in a country as "original" –hence Netflix claimed *Lilyhammer* was a "Netflix original" in the US and often claims shows produced for other US networks and channels as "original" in markets outside the US (Lotz & Havens, 2016).

In this sense, many of the programs that Netflix has marketed as "Originals" are actually third-party products presented "exclusively" in their catalogue in certain territories. As Wayne (2017) indicates:

> Netflix disregard for contemporary TV branding practices is also reflected in the company's liberal use of the label 'original'. As Lotz and Havens notes, much of what Netflix promotes as original content is more accurately described as 'exclusive' in a particular market. For example, American users are told that Norwegian political thriller *Nobel* is a Netflix original despite the fact that the show was produced for NRK (Wayne, 2017).

[1] With this purpose, we have checked reports that chronicle Netflix acquisitions at top Festivals like TIFF, Sundance, SXSW, Cannes and Berlin, using industry sources like Variety, Business Standard, Deadline, Indiewire or The Hollywood Reporter.

Thus, Lotz and Havens (2016) state that only those programs in which Netflix has participated directly and actively in financing their production should be called "Netflix originals":

> The only "Netflix originals" are those Netflix pays to have produced. Most of what Netflix promotes as original content is more accurately described as "exclusive" in a particular market (though they seem to be somewhat liberal in calling programming "Netflix originals" even by this designation!)" (Lotz & Havens, 2016).

In this sense, Havens (2018) nuances Epstein's previous statement, distinguishing between the notion of "product brand" and "service brand." As a service brand, Netflix is focused on personalization and a unique kind of experience (Havens, 2018, p. 322), where Netflix originals are key in terms of exclusivity and personalization. Netflix's own definition of their originals is not completely helpful, as they refer to content either produced in-house or through acquisition of exclusive rights. As already observed, among others, by Becz (2016) or Rodriguez (2019) and as we will see in our data, Netflix is not usually involved in the production of its own Originals, even if its strong brand presence could suggest otherwise. Specialized sources differentiate broadly between the following types of content labelled as "Netflix originals" (Maft, 2017; Robinson, 2018): content pitched by Netflix through a distribution deal in early stages of development, finished content acquired by Netflix for worldwide distribution and finally, content acquired by Netflix to be presented as Netflix originals in specific territories. As we focus our attention on film originals, at least a fourth broad category should be added, that is, content acquired by Netflix to be distributed in most Netflix territories with exceptions in specific markets (inside but also outside Netflix territories, like in mainland China). This more precise categorization, however, has little to do with actual release strategies, which are essential to film distribution. Some titles are released only for streaming, others follow a simultaneous release strategy (D&D), while others have a limited theatrical run in specific territories before streaming release. We will deal with these different options in depth throughout our analysis.

4. Outline of Netflix feature film originals' release strategies

In our study, we have listed fictional feature films presented as "Netflix originals" from 2015, when the first "Netflix Original" film, *Beasts of no nation* was released, to the end of 2018, considered as a year of consolidation with landmark titles as *Annihilation* or *Roma*. The sample comprised those films considered as Netflix originals worldwide, plus those titles that were available as such in almost all Netflix territories. Therefore, those films that were presented as Netflix originals only in specific territories were not considered, as it responds to a different kind of marketing strategy and could bias our analysis. Finally, a total of 171 movies were included, spread in time as follows: 2 in 2015, 27 in 2016, 52 in 2017 and 90 in 2018.

If we consider 2015 as an important but also an exceptional year, we can see that from 2016 onwards, the number of titles almost double each year, showing a remarkable progression in terms of corporate effort (Ng, 2018).

As it is usual in the industry as a whole, Netflix is rarely involved in their originals as a production company, taking usually the role of global distributor. Netflix uses different formulas to showcase more direct commitment in production roles. For instance, appearing as one of the production companies, or having an individual credited as executive producer (which does not imply an actual involvement in the production development and might be just part of an acquisition deal) or even as a producer. But for the most part, Netflix is not credited as having individually or as a company any involvement in production. According to our data, a 66.7% of film originals have no explicit Netflix credit in production; a 13.4% have no explicit Netflix credit in production but shows a Netflix executive in production credit, while a 4.7% shows a "Netflix Presents" label and shows a personal Netflix executive in production credit and a 15,2% shows a Netflix co-production credit.

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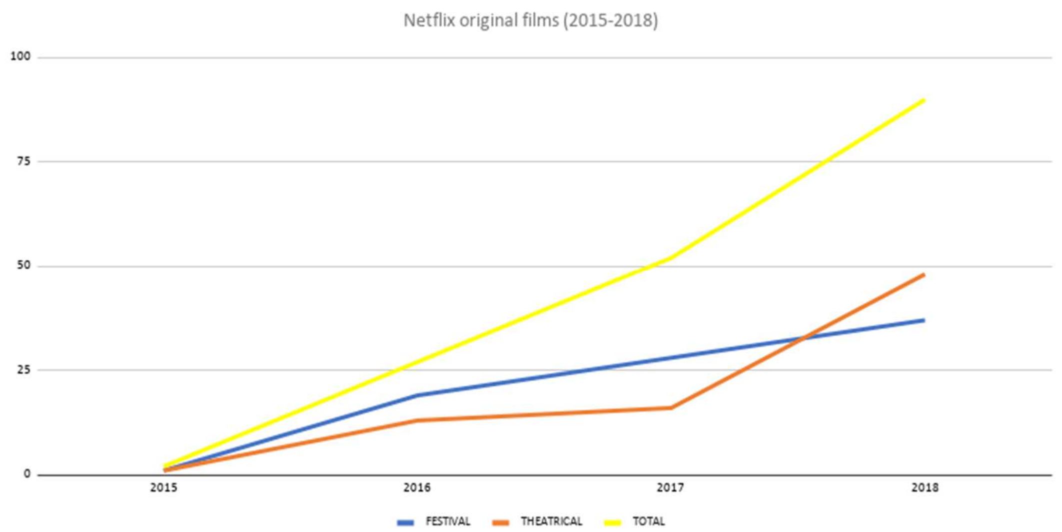
Where do film originals come from? There are different situations: some of these feature films come from deals agreed at various stages of production, be it a project pitching or a deal prior to production. This was the case of Adam Sandler's four film deal through his Happy Madison production company, which, interestingly, can be explained in terms of its already tested appeal to transnational audiences (Jenner, 2018). Even if reliable numbers are hard to come by, after researching news on acquisitions through different secondary sources, contrasted to the time lapse between festival screening and streaming release, we estimate that about one fifth of feature film originals come from acquisitions at top worldwide festivals like Sundance, South By Southwest, TIFF, Berlin or Cannes. Indeed, festivals are a privileged place for the company: half of Netflix originals in our sample (85 films in total) have been shown at festivals. We estimate that about two fifths have been acquired after festival screenings, while the rest correspond to films already presented by Netflix as originals at festivals, in this case usually just a few weeks or even days prior to global screening.

One of the common assumptions regarding Netflix feature film originals is that they are mainly bound for a "direct to streaming" formula. However, far from the notion of the "direct to Netflix" as a norm, we have observed that half the originals have had some kind of festival run, and moreover, a 45.6 % (78 films) has had some kind of theatrical exhibition. If we approach this subsample in more detail, we can identify three main theatrical strategies: a 52.6% corresponds to theatrical exhibition in advance, a 38.5% to Day&Date and an 8,9% to theatrical exhibition after streaming.

Thus, most films with theatrical runs have been shown in advance in selected territories. The second preferred option is Day&Date, also in specific territories. Finally, it is worth mentioning that there are some titles that are shown in theatres after streaming, again in specific territories. Therefore, while aggregated data points towards a relevant proportion of Netflix film originals shown in theatres, it must be approached as a "case by case" scenario, and considering territories.

It is interesting to contrast this aggregated picture with the evolution of titles released theatrically and shown in festivals through the years, as shown in Figure 1.

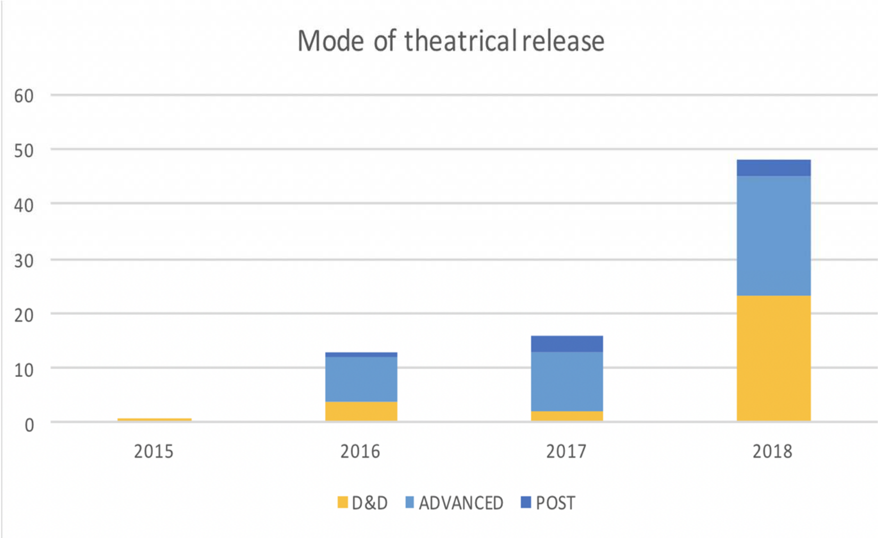
Figure 1: Netflix original films per year (2015-2018).



Source: Own elaboration.

As already stated, the amount of Netflix feature film originals released has increased relentlessly. It is interesting to observe that, from the beginning, Netflix was already aiming for theatrical releases, even if this trend somehow stalled in 2017 to soar again in 2018, where more than half the titles had some sort of theatrical exhibition. Therefore, theatrical exhibition has been always part of the Netflix overall strategy. What might have shifted is the specific way to do that, as shown on Figure 2.

Figure 2: Mode of theatrical release of Netflix feature film originals (2015-2018).



Source: Own elaboration.

Figure 2 allows for a clearer picture of what has changed in terms of theatrical release strategy. While the first Netflix feature film original, *Beasts of no nation,* was released as Day&Date to great buzz in the specialized press, this strategy would coexist with advanced screenings from 2016 onwards and has never been hegemonic. In 2016 and 2017, the release strategy of choice was advanced screening, which in turn opens to a great variety of options depending on territories. Another growing asynchronous option was specialty screenings after streaming release dates, again in specific territories. Most noticeable is the fact that, in 2018, D&D and advanced screening became almost tied. This evolution stresses elements of continuity and diversity, and it makes necessary to take one step deeper into what is behind each of these three options.

Of the 30 D&D feature film originals of our sample, only three are labelled as "worldwide" with an exception (France in one case and Japan twice). Most of them are D&D releases in one or two countries, twenty in total, being the most frequent Singapore (15), the USA (10) and the UK (5). The rest correspond to titles released as D&D in three or more territories. It is also worth noting that D&D does not rule out other options in other territories like advanced screening (3 cases) and subsequent screening (1 case). It is also interesting that only one of the D&D titles has been released theatrically in China, the bigger non-Netflix territory.

Considering the 41 titles released theatrically in advance in some territories, diversity is even bigger: most of these films have been released in advance in only one territory (30), followed by releases in two territories, being the most prominent ones Spain (8), South Korea (4), the USA (4), Australia (3), France (3) and Japan (3). Only a minority of this set of films has been released theatrically in advance in three or more countries (3 in total). Again, only one film has been released theatrically in China ahead of streaming release. Finally, among the 7 films released theatrically after streaming date, they correspond to strictly particular cases, mostly European territories, which does not allow us to identify patterns.

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As it can be concluded, if we take a closer look at release strategies, we can see that Netflix has always considered theatrical release for a significant part of their originals. Similarly, festivals have been an important asset as a marketplace for acquisition or to premiere upcoming new releases. In fact, Figure 1 shows how the percentage of feature film originals shown in festivals exceed those released in theatres until 2018. However, it is essential to understand these logics in a combination of the global and the local. As previously mentioned, the preferred festivals for acquisitions count among the top ones in the international circuit. But theatrical exhibition is very focused on specific territories or areas, and only rarely, like in the case of *Roma* (2018), theatrical exhibition has acquired a similar dimension to a regular windowing release (this would be even more clearly replicated for a key title from 2019, *The Irishman*, which falls outside the scope of this article). Therefore, in D&D releases and particularly in advanced releases, we must consider, in general, very limited theatrical runs and in specific territories, mostly just one or two countries, being the most recurrent the USA, Singapore, Spain, the UK, South Korea, Australia, France and Japan.

5. Language diversity

We have seen how the global strategy of Netflix feature films is informed by a "case-by-case," "territory-by-territory" approach. Therefore, it seems important to pay attention to how these strategies fare regarding language and the particularities of certain territories. It is important to consider that the release of feature film originals started in a crucial year for Netflix's international expansion, 2015, where the service premiered in territories like Australia, New Zealand, Japan. Italy, Spain and Portugal, and blossomed in 2016, the year when Netflix first reached countries like Pakistan, Hong Kong, Singapore, South Korea, Taiwan and the Philippines. As stated by Brennan (2018), Netflix showcases an approach that can be labelled as exponential globalization, based on a "carefully orchestrated cycle of expansion, executed at increasing speed, to an increasing number of countries and customers" (Brennan, 2018). In the Netflix case, two key features are identified. On the one hand, the different stages carried out to enter new markets, using on each stage all lessons learned from the previous one. Thus, in a first stage, Netflix opted for closer markets in terms of geography and cultural similarity; then for other markets considered attractive in terms of media consumption, availability of broadband and shared similarities (second stage) and finally, using all the experience acquired, reached more complex markets in terms of cultural and language diversity, as well as in terms of access to the Internet. The second key, per Brennan, would be the way Netflix works with and responds to the new markets, partnering with key local companies and producing local content (ibid). This way to carry out exponential globalization goes also hand in hand with the evolution of Netflix originals, and will be useful for a better understanding of the data in the case of feature film originals.

Table 1 shows a distribution of titles according to main languages used: this detailed account is useful not only to showcase language diversity, but also to know how it has evolved through time.

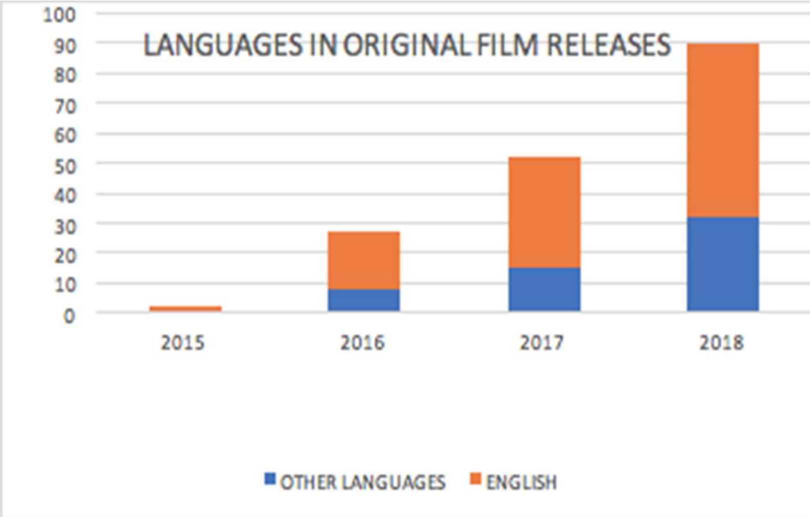
Table 1: Netflix film originals by language (2015-2018).

LANGUAGE	2015	2016	2017	2018	TOTAL
Arabic		1	1		2
Dutch		1			1
English	1	19	37	58	115
English and other languages	1		2	1	3
French		3	2	6	11
Georgian			1		1
Hindi				4	4
Indonesian				3	3
Italian		1		3	3
Japanese			2	3	5
Japanese/Mandarin				1	1
Mandarin				1	1
Portuguese			1		1
Korean			2	2	4
Spanish		2	4	7	13
Tamil				1	1

Source: Own elaboration.

Figure 3 offers a graphic, simplified layout of this data, which allows us to discern more clearly how the presence of languages used in Netflix fictional feature film originals has evolved from 2016 to 2018.

Figure 3: Languages in Netflix original film releases (2015-2018).



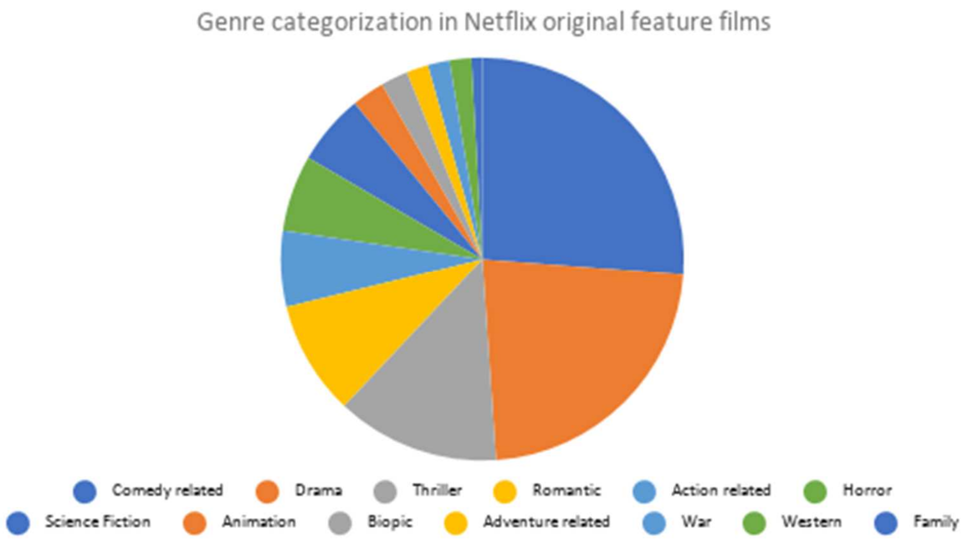
Source: Own elaboration.

As we can see in Figure 3, films with non-English languages, albeit a minority, are more and more significant, accounting already for the 35% of the total in 2018. This fact points towards the importance of diversifying relevance across different territories not only with mainstream global tentpole products but also with local niche productions that help Netflix to present itself as a global-local brand, or as some experts state, a transnational brand (Havens, 2018; Jenner, 2018; Lobato, 2018).

6. Genre

Finally, we will take a look at genre, a concept that we will understand as a conventional discursive 'mode' in which future connections are elaborated as shared expectations for different target audiences (Bordwell & Thompson, 1995; Mische, 2009). Regarding genre, it is well known that Netflix is one of the first media companies to overcome audience parameterization based on a basic demographic. Netflix, as stated by several company executives in public forums, creates content based on "communities of tastes" (Neira, Clares-Gavilán & Sánchez-Navarro, 2020). The traditional concept of genre, in this context, acquires new nuances: in Netflix, genres exist, but the content is liquid and is not trapped in any stagnant category. The logic behind this orientation is that classifying content in sealed categories could make it invisible to other audience niches that, although not identified with that particular categorization, could be interested in that content if presented differently (Neira, Clares-Gavilán & Sánchez-Navarro, 2020). However, traditional genres are still relevant labels today, not only for exhibition and programming purposes, but also for content acquisition. Therefore, as a starting point, we have used categories as expressed in our main sources and we have conducted minor adjustments where we have found some inconsistencies in genre delimitation, in sub-genres (i.e., "Psychological horror," that we have gathered under a general 'horror' category) or where a minor label (i.e., "spy") classification could be integrated in a bigger one (i.e., "thriller"). In many cases (34.5% in our sample), there was not a unique genre definition, so we have considered multiple genre labels for different titles. After all these adjustments, we suggest considering the following categories, shown in Figure 4:

Figure 4: Genre categorization in Netflix original feature films (2015-2018).



Source: Own elaboration.

As it can be observed in Figure 4, half the Netflix feature film originals fall into categories akin to Comedy and Drama, with a notable presence of films categorized as Thriller and as Romantic, a category that frequently overlaps with Comedy. Significant but minor genre categories correspond to Action, Horror and Science Fiction, while there are a few, even if residual exponents of classic genres like the Western, War or Adventure. All in all, this distribution is quite coherent with the trends observed in global film production (see Follows, 2018).

7. Analysis of case examples

In this section we will be providing some additional insight to our aggregated data coming from specific cases regarding non-English language and English language productions. Although our approach is not that of the case study, and taking into account that providing an in-depth analysis of significant case-examples would exceed the limits of the paper format, we have opted for contextualizing some aggregated insights with actual examples that can at the same time reflect the particularities and diversity of feature films. In this section, we have selected some significant cases coming from our dataset. In the selection process, we have considered relevance in the specialized literature but always prioritizing a set of criteria connected to the quantitative analysis, mainly diversity of release strategy (advanced theatrical release, Day&Date), language, focus territory and genre.

As we have seen, Netflix's strategy has been characterized by a continuous increase of release of feature film originals at a steady pace, with each year from 2016 almost doubling the amount of the previous year. Particularly, 2015 and 2016 have proved to be key years for the international expansion of the platform (Dwyer *et al.*, 2018), and therefore, the expansion in the release of feature film originals must be understood in the context of the consolidation of a transnational internationalization process.

7.1. *In search for cultural legitimacy*

From its earlier stages, Netflix has been interested in attaining some sort of cultural recognition for specific products in its catalogue of original feature films, particularly in terms of Academy Awards or presence in international festivals, while turning to renowned film directors like Cary Joji Fujunaga, Bong Jon-Ho, Alfonso Cuarón, Martin Scorsese or David Fincher. It was the case with Netflix's very first original feature film *Beasts of no nation* (2015),

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a war drama based on real events which was released on a Day&Date scheme. Poor box-office performance and controversy among exhibitors affected its award potential, but Netflix has been following this strategy of promoting some arthouse releases in English and non-English language, most of them premiered through advance theatre screenings in selected territories. Thus, in 2017 Netflix presented the South Korean production *Okja* in the Official Competition Section of the Cannes Film Festival, meeting a heated controversy surrounding the eligibility of a film that was not going to be shown in theatres (Thompson, 2017). According to our data, *Okja* should not be considered strictly as a direct-to-stream film, as it was released as Day&Date in the UK and South Korea, but it ultimately adds to the confusion behind what is perceived as a uniform strategy aimed at undermining the windowing system. The strategy finally paid off in 2018, when a Netflix co-production managed to break this wall: Alfonso Cuaron's black and white, Spanish-language drama *Roma.* The film won the Golden Lion award at the Venice Film Festival after having been previously rejected for competition in Cannes due to the open feud related to minimum theatrical window delays in France (Keslassi, 2018a; 2018b). This time, Netflix tried to minimize controversy using all theatrical strategies at once: the film was released as Day&Date in the UK and Ireland, it had an advanced Screening in the USA and subsequent screenings in specialty theatres in different territories after the boost given by Golden Globes and Oscar nominations, possibly as an opportunity for rewatch in big screens.

7.2. *The Chinese market*

We were also interested in observing how Netflix used theatrical exhibition in mainland China, the second biggest single film market in the world, and the key territory with no Netflix service. Contrary to what we expected, there are very few examples in the analysed period. The most well-known exponent was *Crouching Tiger, Hidden Dragon: sword of destiny* (2016), the sequel of the popular film *Crouching Tiger, Hidden Dragon* (2000), a box-office hit and a multi-national effort funded by China, Hong Kong and the United States. The sequel was released in China on the 19th of February, that is, a week before a worldwide streaming release, with a Day&Date run in the USA through IMAX cinemas. In this case, Netflix conducted two experiments at once, that is, theatrical release of a product appealing to Chinese audiences and exhibition in IMAX theatres, in an attempt to add value to the cinematic experience in a Day&Date release, thus avoiding the reluctance coming from conventional exhibitors. This double experiment seems to have been a one-off, in part due to some creative decisions like shooting the film in English and not in Mandarin Chinese like the original, negative reviews and modest revenues, particularly in IMAX exhibition (McClintock, 2016). Only another feature film original, *Us and them* (2018), a mandarin-language film presented as a romantic drama, was released in advance in mainland China to considerable box-office success and even a few local awards.

7.3. *Theatre releases and local audiences*

Another focus of our analysis was to observe relations between theatre releases and potential local audiences that could be drawn to theatres. To have a better understanding of this phenomenon we have to distinguish between films in English language and in other languages.

According to our data, from the 56 titles which contain different languages from English in the analysed period, 48 films (an 85.7%) had some sort of theatrical release; and from these, in the 77% of cases there is a direct correlation between territory and language. But it is also important to consider another result coming from our data: in the subsample of films which contain languages other than English, and which have had some sort of theatrical release, Netflix doesn't seem to own worldwide rights: in fact, this happens only in 8 out of 48 titles (16.7%). This means that in most cases, local theatrical exhibition has been transferred to a third party. Therefore, there is an overwhelming coincidence between Netflix not owning full theatrical rights with Netflix not labelling those titles as originals in that territory.

In the case of English-language films, the picture changes noticeably: only 30 titles, a 26% of the total has had some sort of theatrical release. Still, most of these theatrical titles have been released in selected English-speaking territories, mostly USA, the UK, Ireland, Australia and New Zealand, along with a series of other territories in Europe and Asia. In this sub-sample of English-speaking language films released in theatres, our data shows that, while in half the cases Netflix does not own all theatrical rights, it tends to retain the right to be considered as a global Netflix original, which is another difference in relation to non-English-language films.

7.4. *Genre particularities: the case of horror*

Besides language, other factors have been considered. Horror has proved to be an interesting focal point, as it showcases a great deal of diversity in terms of country of origin, scope of production or scheme of production and acquisition (Roig & Clares-Gavilán, 2020). This can be illustrated by contrasting the case of some well-known horror feature film originals released with a difference of just a few months: *The Ritual* (2017), *Cargo* (2017), *Annihilation* (2018) and *The Cloverfield Paradox* (2018). *The ritual* is an independent British film acquired by Netflix at TIFF and theatrically released in the UK by a one of the producing companies of the film, eOne, in October 2017, and released globally by Netflix in February 2018. The release strategy for *The ritual* in the UK followed a standard 90-day window from theatrical to streaming service. *Cargo,* another Netflix acquisition, is an independent Australian post-apocalyptic horror-drama starred by British actor Martin Freeman. The film, premiered at the Adelaide Festival in October 2017, was released theatrically in Australia in May 2018, just before going for worldwide streaming with the exception of Australia, where it was not made available until November 2018. In turn, *Annihilation* was a Paramount production with a renowned director, Alex Garland. In this case, Paramount sold worldwide rights to Netflix as an original while keeping the rights for a short theatrical run in the USA in February 2018, that is, only 17 days before streaming release. This seemed to be due to Paramount's concern about the film not being appealing enough for wider audiences, thus using Netflix as a way to avoid the marketing costs of international theatrical distribution (Kit, 2017). Another Paramount production, *The Cloverfield Paradox* was the much anticipated third instalment of J.J. Abrams' Cloverfield horror franchise, intended for standard theatrical release. The film had gone through different announcements and delays before being unexpectedly released as a Direct-to-Netflix original, skipping theatres. The film was met with mostly negative reviews and it was suggested that Paramount used Netflix as a safety net to avoid a box-office bomb (Spiegel, 2018).

These four movies, despite sharing genre and close release slates, show also notable differences: *The ritual* had a UK-only standard theatrical release before going for global streaming, while *Cargo,* although sharing some similarities, differs in the fact that it followed a long release window (6 months) in its key local territory, Australia. *Annihilation* had a short US advanced theatrical release before going for a worldwide streaming release. And finally, as for *The Cloverfield Paradox*, theatrical release plans were dropped by Paramount despite its commercial potential as part of an established franchise, and went directly for a surprise streaming slot using a gimmicky promotional action in the US Superbowl. In the first three cases, decisions were based on expectations of early positive reviews and good audience reaction, boosting ticket sales and anticipation for streaming release. And in each case, a different territory was selected for theatrical screening, emphasizing again the local. Contrary to that, in the case of *The Cloverfield Paradox*, which suffered from a troubled development and growing concerns, an advanced theatrical screening could have resulted in a negative buzz, with the result of losing anticipation and audience engagement in the platform release.

Here, the experiment was to use Netflix's projected image as a 'cool brand' to create sudden expectation and attention towards a product for immediate release, thus securing a peak of engagement, even if in a shorter span.

8. Conclusions

The turmoil surrounding growing competition in the feature film market and, of course, the effects of the Covid19 pandemic on the film industry are opening challenging questions regarding the future of film exhibition and the role of streaming platforms as the go-to option to secure global, expensive and ultimately uncertain investments (Neira *et al.*, 2020). In this paper, we have focused on one of the key strategic players in the streaming market, through the particularities of producing and releasing Netflix fictional feature film originals. We have shown some continuities with other kinds of exclusive content in the platform, but we have also highlighted some staggering differences. Considering and analysing Netflix's strategies regarding their fictional feature film originals is a useful way to understand international expansion, transnationality and service brand strategy for Netflix and probably for other streaming platforms. Additionally, complementing quantitative data with case-examples allow us to get a more nuanced picture and to contrast contingent patterns with the case-by-case scenario that is unique to the film industry. We consider that many of the findings presented in this article, like capillarization, cross-national collaboration –mostly from an hegemonic position– and a diversity in terms of release strategies have paved the way towards a complex networked system that fits the singular flow of film production, allowing the streaming giant to present itself as a safety net for productions of different genres, languages, audiences and geographical markets that might find difficulties in a potentially hostile environment affected by a deep crisis.

Looking at the data, but at the same time attending to specific case examples reveal some interesting evidence regarding Netflix's transnational strategies. What could be initially understood as a global corporate strategy based on vertical integration, also integrates some sort of capillary collaboration in theatrical exhibition. This may be considered not as much an additional form of revenue but a way of keeping a presence in specific territories, playing the game of the windowing system and relying on local distributors, rather than imposing a single model. Also, that even if restricting the notion of what a Netflix feature film original is, it still showcases a great deal of diversity and complexity. In any case, this strategy based on capillary collaboration allows for a noticeable catalogue diversity (including *arthouse* films) to be explored; and, in some cases, a greater exposure of locally developed content in a quite narrowly defined set of popular genres. Similarly to non-English-speaking series originals that have been extensively promoted by Netflix globally, like *Dark*, *The Rain* or *Kingdom*, we find the recent case of Spanish dystopian film *El hoyo (The Platform),* a Netflix acquisition that became a global hit in early 2020 in coincidence with the Covid-19 pandemic. But in the case of feature films there lies a remarkable difference: that is, the cases in which a film has a transnational award potential. The most notorious and successful case so far is the Spanish speaking feature film *Roma* (2018), which has received numerous awards like best Iberoamerican Film at the Goya Awards or best movie not in the English language in the Academy Awards (ten nominations and three wins), the Golden Globe Awards, the BAFTA Awards, the Independent Spirit Awards, the Critics' Choice Movie Awards, etc.

All in all, we have observed that neither language, genre nor a delimited timespan translates necessarily into a clear-cut pattern: in the end, fictional feature film originals have to be approached taking into account a case by case scenario. However, it can be stated that production companies, even Majors have turned to Netflix as a way of lessening commercial risks particularly regarding Print&Advertising costs in the case of completed films made for global release but assessed as potential box-office bombs, as it was the case of *The Cloverfield Paradox*, or other coetaneous genre films like *Mute* or *Extinction*, both planned for theatrical

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release but ultimately released directly for streaming without a premiere or festival presence. Netflix films produced in the USA are not aimed only to American audiences, and tend to have a transnational goal in mind, as part of an exponential global strategy. As for the films produced outside the USA, be it English-language films or not, the transnational goal in some cases co-exists with the need to produce content for specific territories, with growing emphasis on cultural -and language- diversity. This also crosscuts with the combination of content oriented to mass appeal and content aimed to niche audiences and prestige.

In this sense, future work in this line could be focused on the evolution of streaming strategies in the wake of the pandemic turmoil on film releases, opening the study to a comparative with other established platforms like Prime Video or newer platforms like Apple TV+, Disney+ or HBOMax. Also, through detailed case study bounded by genre conventions, territories (including forms of collaboration with local companies) or focused on particularly relevant titles. Finally, it would be interesting to undertake a detailed study of typologies that have not been considered in this study, like non-fictional feature film originals. As we have presented in this article, the different approaches used by Netflix fit in a global plan of expansion and consolidation as a brand of choice in an era of strong competition in the streaming content market, playing a long-term game. This can be particularly observed in the case of Netflix feature film originals.

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