

# On-Demand Isn't Built in a Day: Promotional Rhetoric and the Challenges of Netflix's Arrival in Italy

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## *Abstract*

In the months surrounding Netflix's arrival on the Italian market, different media outlets presented the platform not only as revolutionary, a game-changer, but also as a threat for established broadcasters. After a long wait, with hype fanned by the news coming from the US, the launch in many other European markets, and the strengths of the first branded productions, Italian TV audiences have also been able to access Netflix's library and original series, since 22 October 2015. On the one hand, Netflix has reaped the results of its effort to establish a long-term promotional discourse in Italy. On the other, however, Netflix's late appearance was also couched in the context of a complex media scenario and an already established national on-demand market. A rhetoric of disintermediation has been carefully constructed at the exact moment when a powerful global intermediary was entering the Italian market, masking its (future, intended) gatekeeping role. Adopting a media-industry and production-studies approach, this essay reconstructs Netflix's arrival in the Italian landscape, focusing on the promotional discourse and its rhetoric, and on the reactions from the press, to give a deeper, more nuanced view of the phenomenon in the national media arena.

In the last decade, the emergence and onward march of subscription video-on-demand services (SVOD) has often been presented and marketed as a revolution. After a period of transition, this paradigm shift would destroy the foundations of 'traditional' linear broadcasting, providing unprecedented access to film, television series, and other content without filters or intermediation. However, a closer look reveals how, despite the hopes, rhetoric, and expectations, the transition towards non-linear television has proved more complex, with overlaps and incongruities, as old habits coexist with original innovations, and with no stable outcome. To paraphrase a proverb, 'on-demand isn't built in a day' but requires a long, uncertain gestation.

Concentrating on a single on-demand platform, Netflix, and a single country, Italy, this paper examines how the service was launched on the national market, from announcement to completion. It highlights the challenges of the inauguration, the company's promotional efforts, the role of audiences, opinion

leaders and institutions, the professional routines and approaches involved, the rhetoric used, and its impact on the public discourse. Italy is a peculiar example because of the specificity of the national media, but also due to the launch's intermediate position, between the early-adopter foreign countries, where the service entered some years before, and the one-day global launch in (almost) all the remaining markets in January 2016.

The analysis focuses on three levels. First is the important, even crucial, role played by promotional cultures in presenting a technological, editorial, and commercial innovation that arrived late in the medium-sized Italian market. The choice of specific timings and tools, the 'triggers' used to generate and amplify discourse, and the building of a relationship with a wide range of cultural actors show how promotional goals are always complemented by habits, best practices, and professional logics rooted in screen industries and production cultures.<sup>1</sup> On a second level, from an industrial and professional perspective, reconstructing the trajectory of Netflix's beginnings in Italy brings out not only its distinctive features but also some more general concepts on these services and their expansion logic. These include an international company's relationship between the local and the global, the emergence of a specific model for 'robust large television markets', and the complexities of countries with long histories and intense competition such as Italy (or France, Spain, and Germany),<sup>2</sup> the inevitable clashes between hype and reality, or the compromises and alliances that even a powerful, disruptive service such as Netflix has to forge in order to position itself and be successful. Moreover, on a third level, building on distribution logic and discourses, the step-by-step narration of Netflix's entry into the Italian media circuit highlights the struggle between the disruptive rhetoric and the original forms of re-intermediation provided by on-demand platforms and content aggregators.<sup>3</sup> In film, television, and digital media, distribution is

<sup>1</sup> On promotional discourses and logic in film, television, and digital media, see Catherine Johnson and Paul Grainge, *Promotional Screen Industries* (London: Routledge, 2015) and several articles in the special 'Ephemeral TV' issue of *Critical Studies in Television*, ed. by Catherine Johnson and Elke Weissman, 12.2 (2017), 97–205.

<sup>2</sup> For an overview of the slow but continuous growth of video-on-demand markets in Europe and Netflix's role, see IT Media Consulting, *Il video on demand in Europa: 2015–18*, report, June 2015 (and subsequent updates). Other important sources of information are the European Audiovisual Observatory reports, especially Gilles Fontaine and Patrizia Simone, *VOD Distribution and the Role of Aggregators* (Strasbourg: European Audiovisual Observatory, 2017). On the specificities of the French case history, see Arthur Kanengieser and Olivier Bomsel, *Après Netflix. Sensibilité des obligations de production de la télévision à la pénétration de la SVOD*, Chaire ParisTech d'Économie des Médias et des Marques, September 2014. On the German scenario, see Lothar Mikos, 'Netflix – zwischen Mythos und Realität', *tv diskurs*, 3 (2016), 84–87; and Christian Stiegler, 'Invading Europe: Netflix's Expansion to the European Market, A German Case Study', in *The Netflix Effect: Technology and Entertainment in the 21st Century*, ed. by Kevin McDonald and Daniel Smith-Rowsey (New York: Bloomsbury, 2016), pp. 203–18.

<sup>3</sup> On this topic, see Chuck Tryon, *On-Demand Culture* (New Brunswick: Rutgers University Press, 2013); Patrick Vonderau, 'The Politics of Content Aggregation', *Television and New Media*, 16.8 (2015), 717–33. See also *The Netflix Effect*.

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crucial in shaping media texts and their meaning, in making them available and accessible to viewers, in framing, connecting, and monetizing otherwise disparate audio-visual fragments.<sup>4</sup> The debut of the most widespread and significant on-demand subscription platform offers an opportunity to explore both its role in furthering the spread of content and brands and the discursive space occupied by opinion leaders, media gatekeepers, and promotional tactics.<sup>5</sup>

The research presented here follows an approach grounded in media-production studies;<sup>6</sup> it is mainly interested in professional logics, trade rituals, and advertising routines, on the one hand, and the creation of informative and promotional discourses through various professional and amateur players, on the other. Promotion has a value both in itself, as discourse trying to set the agenda at carefully planned times, and to generate other discourses, and in revealing industry strategies and logics, thanks to the public or semi-public role of some of the main professional actors involved; and this is particularly useful in a case of Netflix, where the access to first-hand information and data is extremely limited. Consequently, a complete mapping has been conducted of the articles on Netflix published on paper and digitally by the main Italian newspapers, magazines, and trade publications from May to October 2015. Where necessary, that survey has been supplemented by an analysis of top-down and bottom-up online discourses about Netflix on social media, singling out a selection of user accounts and posts/tweets: while the institutional messages are fully part of every step in the promotional strategy, grassroots ones have been especially important

<sup>4</sup> See Jeff Ulin, *The Business of Media Distribution: Monetizing Film, TV and Video Content in an Online World* (Boston: Focal Press, 2009); *Distribution Revolution: Conversations about the Digital Future of Film and Television*, ed. by Michael Curtin, Jennifer Holt, and Kevin Sanson (Oakland: University of California Press, 2014); Alisa Perren, 'Rethinking Distribution for the Future of Media Industry Studies', in *Cinema Journal*, 52.3 (2013), 165–71; on TV scheduling's role in creating order in the digital scenario, see also Luca Barra, *Palinsesto. Storia e tecnica della programmazione televisiva* (Rome-Bari: Laterza, 2015), pp. 156–82.

<sup>5</sup> For an initial analysis of the significance of distribution and promotion in media trends, see Paul M. Hirsch, 'Processing Fads and Fashions: An Organization-Set Analysis of Cultural Industry Systems', *American Journal of Sociology*, 77.4 (1972), 639–59. The pyramidal model presented there — with production connected to distribution and distribution tied to both consumption and media gatekeepers — is extremely valid for television and digital media, too, and has also shaped the present study.

<sup>6</sup> See John T. Caldwell, *Production Culture: Industrial Reflexivity and Critical Practice in Film and Television* (Durham: Duke University Press, 2008); Mark Deuze, *Media Work* (Malden: Polity Press, 2007); *Production Studies: Cultural Studies of Media Industries*, ed. by Vicky Mayer, Miranda J. Banks, and John T. Caldwell (London: Routledge, 2009); *Production Studies, The Sequel! Cultural Studies of Global Media Industries*, ed. by Miranda Banks, Bridget Conon, and Vicky Mayer (London: Routledge, 2015); *Behind the Screen: Inside European Production Cultures*, ed. by Petr Szczepanik and Patrick Vonderau (London: Palgrave MacMillan, 2013); Timothy Havens, Amanda D. Lotz, *Understanding Media Industries* (New York: Oxford University Press, 2012); *Making Media Work: Cultures of Management in the Entertainment Industries*, ed. by Derek Johnson, Derek Kompare and Avi Santo (New York: NYU Press, 2015); *Media Industries: Perspectives on an Evolving Field*, ed. by Amelia Arsenault and Alisa Perren (Media Industries Editorial Board, 2016).

as indicators able to signal rumours and news, often stimulated or exploited by promotion. The focus was then mainly on the role played by several media outlets in orienting and expanding the official discourses about the platform, and — through a direct analysis of documents such as press releases, where possible, or drawing inferences from journalists' articles — on the official promotion and press-office work.

*A Long Wait, Full of Expectation*

The Italian version of Netflix launched in late October 2015; the on-demand platform had already achieved considerable success in the United States, developed its acclaimed first original productions — with titles such as *House of Cards* (Netflix, 2013–) and *Orange is the New Black* (Netflix, 2013–) — and launched its service in several foreign countries, including some major European markets: the UK, Ireland, and Scandinavia in 2012, plus France, Belgium, Germany, Austria, and Switzerland in 2013.

As a consequence, the hype, the attention, and many traces of the global discourse about the service was widely experienced in Italy some years before Netflix was available to consumers there. The brand enjoyed a continuous presence in Italian-language web pages, sites, and articles from 2012, with accounts of the platform's features and its global-expansion plans, and rumours about a future debut in Italy, which intensified in the years that followed, and especially in the months leading up to the launch.<sup>7</sup> On national newspapers and magazines, both on paper and online, the international discourse was first mediated by foreign correspondents in the US, framing it as a new curious 'phenomenon' from abroad and a possible future revolution, and later explored in more detail by tech journalists, focusing on platform, interface and library, and by entertainment specialists as well, giving some space to contents, original productions and the actors and writers involved. This sporadic yet constant presence received a boost with the first European expansion of the platform, with mixed feelings of exclusion from the first and second tier of countries involved and of hype on the brand and its main assets, waiting for the almost inevitable Italian 'invasion'.

The start of the Italian version of the service could be carefully planned in fine detail, building both on the knowledge developed by the company in previous years and in similar markets, and on an established groundswell of needs and expectations (which at times were naïve). In 2015, Netflix Italia was entering the national market, where all parties — both the audience, or at least its most informed consumers, and the industry players, such as 'traditional' broadcasters and other on-demand services that launched similar viewing platforms and

<sup>7</sup> Source: Google Trends.

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models before Netflix's arrival — had in many ways already formed their own idea about the service, months and years before it materialized.

Netflix's promotional efforts therefore had to take into account a huge number of discourses, hypotheses, opinions and expectations, true and false, about the company's plans, which had already been shaped and disseminated by grassroots users and corporate media. Moreover, this buzz was generated by the local repercussions of the company's US and then international publicity activities, which crossed national borders and laid the groundwork on which Netflix Italia's effort to establish and develop a specific, long-term promotional discourse would be built. It is important, in this initial phase of shaping the on-demand service's public image, to highlight the lack of direct action by the company — which was present only in the knock-on effects of its actions and campaigns in other countries — and the subsidiary role of many intermediaries trying (in an often disorganized, uncoordinated way) to fill this gap and to provide newsworthy information. They included amateur online users and more established sources, such as newspapers, magazines, radio and TV shows, and technology and media websites, including some possible media competitors. This rich yet confused discourse was both a strength, highlighting Netflix's impact and forging a positive image of the brand and the service, and an important and complex challenge, as the company was forced to live up to a growing hype and keen anticipation.

### *Initial Announcements: The Hype and the (Tentative) Attempts To Control It*

The first official announcement of the Netflix launch on the Italian media market came on Saturday, 6 June 2015. The carefully planned story was released on several media outlets especially to reach the service's potential target audience: mainly young viewers and tech-savvy early adopters. At the same time, however, the story was constructed to follow the classic rules of the 'promotional game', reaching mainstream journalists and opinion leaders, helping them to understand the service, and inviting them to contribute to the general discussion. The news spread along four main 'axes', with different tones and targets, giving shape to a multi-faceted discourse.

A classic press release, a short text confirming the Italian launch together with those in Spain and Portugal, was the first action by the company and its delegates. There were no details on the national offering, the features of the service, or the catalogue; it was primarily a teaser, to be explained and expanded on in subsequent months. The second promotional device was a special tweet, in Italian, from the official US Netflix Twitter account,<sup>8</sup> spreading the news online

<sup>8</sup> The tweet, including three emojis (Italian flag, television, and heart-shaped-eyes smile), was: 'Buongiorno! Ora è ufficiale: a ottobre Netflix arriva in Italia. A proposito, come si dice binge-watching in italiano? #ciaoNetflix' ['Hello! Now it's official: in October, Netflix is coming to Italy.

and introducing a special hashtag, '#ciaoNetflix', which the Italian audience used on their own Twitter accounts over the ensuing days (and on other social media, including Facebook). Another important operation in this coordinated effort was the cover of the Italian edition of *Wired* magazine, which showed Hastings, Netflix chairman and CEO, switching off an old TV set and promising to 'turn off old television forever'.<sup>9</sup> Inside, a long interview focused on the company, its goals, its US and global success, and its disruptive power ready to be unleashed in Italy.<sup>10</sup> The fourth pillar was 'Netflix House', a space established in Milan from 29 June to 2 July, where invited journalists could try out and learn to use Netflix in half-hour sessions aided by trained 'educators', all in the presence of Stuart Gurr, director of UK and EMEA originals publicity. As one newspaper headline suggested, 'Netflix exists and is educating the journalists',<sup>11</sup> revealing the company's understanding of the national opinion leaders' fundamental mediatory role. Building the first announcement on a wide set of tools — the press release, a social-media account, an exclusive interview in a tech-oriented magazine, and a PR initiative with mainstream media — reflected not only the company's meticulous attention to the Italian market but also its need to take immediate control of promotion.

Before an official launch date was set, and without an Italian corporate social-media account, Netflix started to build its narrative in third-party spaces, presenting itself as a global success story, a disruptor that could change television and frighten established broadcasters. It was a revolution, a game-changer, a threat: as headlines and summaries reported, on-demand would destroy classic TV, with its obsolete broadcasting models and lowbrow shows, freeing viewers from the tyranny of the schedule, synchronized viewing times, and programming made only of entertainment formats.<sup>12</sup> A slew of newspaper, magazine, and online articles followed, spreading the 'good news' and highlighting the service's strengths: low price, ease of access, a user-friendly interface, excellent compatibility with numerous digital platforms, original content (already familiar to Italian viewers), and a choice of multiple versions of films and TV series: original, subtitled or dubbed in Italian. Some Italian-language publications on this topic began following the lead.<sup>13</sup> The main drivers towards uptake of the

By the way, how do you say binge-watching in Italian?', [my translation] (@netflix, 6 June 2015).

<sup>9</sup> [my translation]

<sup>10</sup> Maurizio Pesce, 'Tutto sull'arrivo di Netflix in Italia. Intervista esclusiva al boss Reed Hastings', *Wired Italia*, June 2015 <[www.wired.it/play/televisione/2015/06/29/intervista-reed-hastings-netflix](http://www.wired.it/play/televisione/2015/06/29/intervista-reed-hastings-netflix)> [accessed 27 July 2017].

<sup>11</sup> Maurizio Caverzan, 'Netflix esiste e istruisce i giornalisti', *il Giornale*, 16 June 2015, p. 26.

<sup>12</sup> A good example is: Stefano Crippa, 'Fuori dal format, Netflix prova la rivoluzione del palinsesto', *il manifesto*, 9 June 2015, p. 13. See also: Andrea Secchi, 'Netflix, lavori in corso per costruire la library italiana', *Italia Oggi*, 30 June 2015, p. 21; Giacomo Gambassi, 'Arriva Netflix. È vera rivoluzione?', *Avvenire*, 2 July 2015, pp. 1 and 24.

<sup>13</sup> These are mostly journalists' and popular analyses. See Stefano Zuliani, *Netflix in Italia e il big bang di cinema e tv* (Milan: Il Sole 24 Ore, 2015); Francesco Marrasso, *Effetto Netflix. Il nuovo paradigma televisivo* (Milan: Egea, 2016); Ester Corvi, *Nuovo cinema web. Netflix, Hulu, Amazon:*

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service were content, and especially money and technology. Some articles also looked at weaknesses, often relating not directly to the service but to Italy's media system and infrastructure in general: the patchy high-speed bandwidth coverage, the paucity of early adopters in an under-developed digital nation, the content library still under construction because of a lack of available licence rights and distribution deals, and the high competition in the market with the other services operated by broadcasters and telcos (such as Mediaset, Sky Italia, and TIM/Telecom Italia) already providing non-linear programming to their small consumer bases.<sup>14</sup> Even the weaknesses were reported by the press using the company's promotional rhetoric.

During this phase, however, the company also tried to establish a counter-narrative, taking into account the struggles of the previous European launches, especially in France, where just after the launch a backlash followed on both press and social media, criticizing the limited width of the initial catalogue and the lack of some important, expected license rights.<sup>15</sup> 'Netflix House' in Milan included a press conference by Joris Evers, then vice-president and head of communication for Europe, the Middle East and Africa, to downplay the revolutionary aspect, to present the on-demand platform as an ancillary service that complemented not replaced free and pay television networks, and to scale down the hype. He and his fellow senior executives proclaimed, among other things, 'we are not at war with the television networks',<sup>16</sup> 'it's like having a sumptuous buffet to hand, but not an unlimited one; people should not expect that, and we want to make that clear from the start',<sup>17</sup> or 'we are not an encyclopaedia, a place where every show is available, but one channel among others'.<sup>18</sup> This narrative, however, would disappear over the ensuing months, as the Italian launch progressed, losing this more nuanced, and cautionary, approach.

From the start, through its strong mediation, the company tried to directly and indirectly orient the local public discourse, carefully building interest in the platform, highlighting its strengths, with few caveats, and enhancing an already extremely positive public image.

*la rivoluzione va in scena* (Milan: Hoepli, 2016).

<sup>14</sup> On Italy's complex on-demand scene and its relationship with national television broadcasters, see Luca Barra and Massimo Scaglioni, 'Convergenze parallele. I broadcaster tra lineare e non lineare', in *Streaming Media. Circolazione, distribuzione, accesso*, ed. by Valentina Re (Milan-Udine: Mimesis, 2017), pp. 31–47.

<sup>15</sup> 'Après Netflix'.

<sup>16</sup> Paolo Giordano, 'Arriva Netflix: "Non facciamo la guerra alle tv"', *il Giornale*, 30 June 2015, p. 24 [my translation].

<sup>17</sup> Andrea Biondi, 'Netflix: in Italia produzioni globali', *Il Sole 24 Ore*, 30 June 2015, p. 21 [my translation].

<sup>18</sup> Bruno Ruffilli, 'Netflix presenta la sua offerta tv: "Siamo un canale, non l'enciclopedia"', *La Stampa*, 30 June 2015, p. 38 [my translation].

*The Lead up to the Launch: Italianized Promotion*

During summer 2015, the public discourse on the Netflix launch in Italy was kept alive with a different spin. A spotlight on the company, the revolutionary aspects of the service and its success in the US and the rest of the world gave way to a more local attention to the potential strong connections between the global company and the national film, media, and television industry. Some recurring stories, spun by Netflix's PR department (and by other companies looking to tie their image to the incoming service's strong brand) and reported by the national press, then focused on possible future production and distribution links between the two countries. First, there was the foreshadowing, with scant detail, of a mafia-related TV series produced in and for Italy. The article paved the way for later announcements, explicitly highlighting a (supposed) 'panic' among domestic competitors who were already investing in original fiction production, such as Mediaset and Sky.<sup>19</sup> Another step was the early award given by an Italian film festival on the island of Ischia, near Naples, to Netflix chief content officer, Ted Sarandos, flanked by national movie and television producers. The award preceded the launch of the platform, and even any hint about its original Italian productions. However, it attracted international attention to the company's plans.<sup>20</sup> Lastly, national telco company TIM/Telecom Italia announced a non-exclusive partnership and distribution deal with Netflix, to partially resolve the endemic broadband problem, thus strengthening links to Italy and gaining both companies some extra press attention.<sup>21</sup> These morsels of news filled a void, maintaining the interest before the main story broke. Moreover, the first announcement aroused considerable grassroots curiosity, even spawning a counterfeit Italian Netflix Twitter account, which sent 7 tweets and misled a few journalists before it was disabled.<sup>22</sup>

On 1 October 2015, a second official announcement gave full details of the Italian launch: the date October 22nd, the offer, with a month free trial for new subscribers, and three different prices for basic and premium services,

<sup>19</sup> Carlo Tecce, 'Netflix fa Mafia Capitale: panico a Mediaset e Sky', *il Fatto quotidiano*, 8 July 2015, pp. 1 and 15.

<sup>20</sup> 'Ted Sarandos incontra il mondo della produzione audiovisiva italiana', Italian Television Producers Association (APT) website, 18 July 2015 <[www.apr.it/focus/ted-sarandos-incontra-il-mondo-della-produzione-audiovisiva-italiana](http://www.apr.it/focus/ted-sarandos-incontra-il-mondo-della-produzione-audiovisiva-italiana)> [accessed 27 July 2017]; Nick Vivarelli, 'Netflix's Ted Sarandos Schmoozes With Italian Industry At Ischia Global Fest', *Variety*, 17 July 2015 <[variety.com/2015/digital/festivals/netflixs-ted-sarandos-schmoozes-with-italian-industry-at-ischia-global-fest-1201542936/](http://variety.com/2015/digital/festivals/netflixs-ted-sarandos-schmoozes-with-italian-industry-at-ischia-global-fest-1201542936/)> [accessed 27 July 2017].

<sup>21</sup> See, for instance, Melania Di Giacomo, 'Telecom con Netflix, la banda larga per la tv via internet', *Corriere della Sera*, 30 July 2015, p. 32; Andrea Biondi, 'L'accordo. Partnership fra Telecom e Netflix', *Il Sole 24 Ore*, 30 July 2015, pp. 23–25; Luca Pagni, 'Telecom porta Netflix in Italia per spingere sulla banda larga', *la Repubblica*, 30 July 2015, p. 26.

<sup>22</sup> Emanuele Capone, 'Ciclone Netflix: scendono i prezzi', *Il Secolo XIX*, 9 September 2015, p. 38, is an example of the articles written drawing on the fake account. It published details of subscription costs.



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and some initial hints about the catalogue. Once again, press coverage and online reaction were enthusiastic, adopting the usual rhetoric of revolution and disruption, encouraged by the company and its PR: many articles reported Netflix as a 'hurricane' transforming the media scenario and scaring its competitors.<sup>23</sup>

Following this lead, the weeks before the Netflix Italia launch were punctuated by announcements focusing on content that highlighted the service's espousal of a very loose, general idea of Italianness, while at the same time building on some established world-famous trademark Netflix productions already broadcast in Italy and known to the local audience. The first Italian Netflix co-production, *Suburra* (Stefano Sollima, 2015), made with production company Cattleya and Rai, the public service broadcaster, was officially announced, partially exploiting the promotional effort for the movie, which acted as a pilot for the TV series. The long-term plans for the serialization (released in October 2017) were brought forward to confirm an investment in the Italian market and to exemplify a need for 'local stories with global interest' at the heart of Netflix's production plans.<sup>24</sup> The major production *Marco Polo* (Netflix, 2014–16) was also trumpeted for its Italianness, in terms of the story and the actors involved, with interviews and junkets with the star, Lorenzo Richelmy, and leading Italian film actor Pierfrancesco Favino.<sup>25</sup> Regarding the second aspect, the big Netflix content brands *House of Cards* and *Orange Is the New Black* were heavily exploited, even if the first few seasons had already been broadcast (and released on proprietary on-demand services) by Sky Italia and Mediaset Premium, respectively. With the first title, Netflix had already licensed the broadcasting rights exclusively to Sky, with a life-of-series pre-emption clause, thus depriving the platform of its most recognizable product: in subsequent months, this conflict prompted a social-media PR effort on both sides, with fictional character Frank Underwood protesting from the Netflix official account about the series' absence from the digital service, and his wife Claire sharply responding on behalf of Sky Italia.<sup>26</sup> Netflix and Mediaset struck a deal about *Orange Is the New Black*, meanwhile,

<sup>23</sup> See, for instance: Piero Degli Antoni, 'Dateci la banda larga e avrete i film. Netflix, il telecomando va online', *Il Giorno*, 1 October 2015, p. 14; Mattia Pasquini, 'Intanto anche in Italia arriva il ciclone Netflix', *l'Unità*, 1 October 2015, p. 5; Marco Cubeddu, 'Perché le serie tv di Netflix ci avvicinano all'Apocalisse', *Il Secolo XIX*, 1 October 2015, p. 39.

<sup>24</sup> See, for instance: 'Accordo Netflix-Rai, e "Suburra" (la serie) debutta su internet', *Corriere della Sera*, 6 October 2015, p. 46; Natalia Lombardo, "'Suburra', il cinema che diventa anche tv', *l'Unità*, 6 October 2015, p. 17 and 21; Silvia Fumarola, "'Suburra" arriva online su Netflix. Il film di Sollima diventerà serie tv', *La Repubblica*, 6 October 2015, p. 65.

<sup>25</sup> Simonetta Robiony, "'Con un provino a distanza sono diventato Marco Polo'", *La Stampa*, 6 October 2015, p. 30; Silvia Fumarola, 'Favino: "Cambiamento che non danneggia il cinema"', *la Repubblica*, 23 October 2015, p. 56.

<sup>26</sup> The picture with Frank Underwood's letter was posted on Twitter, as a response to other tweets, by the official series account @HouseOfCards (4 March 2016); the response, with a handwritten note by his wife, Claire, was posted by the Italian Now TV account, the OTT service connected to Sky Italia (@NOWTV\_It, 8 March 2016).

allowing it to appear on both platforms, so that Netflix Italia could ‘have back’ one of its globally distinctive titles since the beginning.<sup>27</sup>

In the months and weeks after the official announcements in the run-up to the launch date, therefore, the promotional effort continued to play on the service’s revolutionary power and disruptive strength while seeking some initial ways to mediate with the national taste, the market, and the audience expectations, with many successes and some minor failures.

### *The Official Launch: Great Power (and Great Responsibilities)*

With an official national website, a service app at the main digital outlets, and a host of social-media accounts, Netflix launched in Italy on 22 October 2015. It immediately deployed all its promotional ‘weapons’, in contrast to the lower-key launches in Spain and Portugal, the other two markets that the service was entering.<sup>28</sup> The main promotional events, with a guest list of journalists, opinion leaders, and celebrities, took place in Milan. First, Reed Hastings and Ted Sarandos presented the service at a press conference, with panel and individual interviews with the two managers; then, actors from Netflix’s original productions<sup>29</sup> flooded the city, attending the press conference and various photo opportunities in Milan’s main landmarks, from the Duomo and La Scala theatre to Galleria Vittorio Emanuele; finally, there was a huge launch party in the evening, with the actors in attendance. Less visible, but extremely important, was a high-level meeting in Rome between the Netflix policy and legal affairs leads and representatives of the Italian Culture and Economic Development ministries, where Under-Secretary of Communications Antonello Giacomelli bid a ‘warm welcome to a company willing to invest in Italy’.<sup>30</sup> Netflix conspicuously cultivated relationships with the national press, journalism and media scene, bringing over top managers and Hollywood actors while at the same time creating useful connections with national institutions and policy-makers.

As a result of this huge synchronized effort, both the press and online discourses adopted the Netflix PR and communication department’s promotional rhetoric almost uniformly. Once again, headlines, articles and interviews reported that ‘TV 2.0 may end up changing the whole country’, portraying the service as an ongoing ‘streaming revolution’ ready to be completed.<sup>31</sup> When consulted, even

<sup>27</sup> Andrea Biondi, ‘Accordo Mediaset-Netflix sulle serie tv’, *Il Sole 24 Ore*, 13 October 2015, p. 14.

<sup>28</sup> ‘Radiografia de Netflix’, *El País*, 21 October 2015, p. 46.

<sup>29</sup> Will Arnett, voice of *Bojack Horseman* (Netflix, 2014–), Kristen Ritter and Carrie Ann Moss from *Jessica Jones* (Netflix, 2015–), Taylor Schilling and Kate Mulgrew from *Orange Is the New Black*, Daryl Hannah and Miguel Angel Sylvestre from *Sense 8* (Netflix, 2015–18), Pierfrancesco Favino, and *Daredevil* screenwriter Steven DeKnight (Netflix, 2015–).

<sup>30</sup> ‘Giacomelli incontra Netflix’, *Italia Oggi*, 22 October 2015, p. 26.

<sup>31</sup> See, for instance: Renato Franco, ‘La partita della tv via web. In Italia è l’ora di Netflix’, *Corriere della Sera*, 23 October 2015, p. 1 and 51; Virginia Della Sala, “Netflix, la tv anche al parco”,

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direct competitors and other market stakeholders (including Mediaset's president and the national copyright society SIAE)<sup>32</sup> shared the same basic views on the service, casting it in a predominantly bad light but without disputing the idea of disruption or the on-demand platform's future nationwide power. All caution was abandoned at that point, and Hastings set the bar high in his interviews, explaining that Netflix Italia would be considered a success only when a third of households ('one family in three') was using the service, probably within seven years.<sup>33</sup> Amid the enthusiastic approval of the press and grassroots discourse, the triumphant promotional rhetoric went beyond the Italian market's limits, traditions, and habits, by forecasting a result that will be tough, if not impossible, to reach.<sup>34</sup> At least during the brand's moment of maximum exposure (with wide press coverage, free and promoted trending online topics, and even some reports on the mainstream television news), the choice of brand communication took a strong tone, building on all the previous anticipation and actually ignoring a possible subsequent backlash (as had already happened in France and, to a certain extent, in Germany).<sup>35</sup>

### *Conclusions: The Mechanics and Consequences of Promotional Discourse*

The reconstruction of the promotional efforts, the press response and public discourse in the months leading up to the Netflix launch in Italy — which are investigated mainly through articles, interviews, and social media — serves to identify the various (sometimes conflicting) otherwise hidden promotional approaches and multiple logics, which are seen as neutral or 'natural', and to highlight the crucial intermediary role constantly played both by the US and global company based in Los Gatos and by many national media, stakeholders, and institutions. This is just one of the possible roads to take for an on-demand operator entering a different national market: for instance, a year later, in late

*il Fatto Quotidiano*, 23 October 2015, p. 9; "Promettiamo una rivoluzione", *il manifesto*, 23 October 2015, p. 13; Nicole Cavazzuti, 'Arriva Netflix, la tv è servita', *il Messaggero*, 23 October 2015, pp. 1 and 27; Silvia Fumarola, 'Streaming Revolution. Clicca e guarda. La tv italiana entra nell'era di Netflix', *la Repubblica*, 23 October 2015, pp. 1 and 56; Massimo Russo, 'La tv 2.0 comincia dalle serie e dai film ma può finire per cambiare il Paese', *La Stampa*, 23 October 2015, p. 11 [my translations].

<sup>32</sup> 'Confalonieri: "Con Netflix non corriamo ad armi pari"', *il Giornale*, 17 June 2015, p. 22; 'La SIAE contro Netflix', *il Fatto Quotidiano*, 21 October 2015, p. 21.

<sup>33</sup> Andrea Biondi, 'Netflix punta a una famiglia su tre', *Il Sole 24 Ore*, 23 October 2015, p. 15; Jaime D'Alessandro, 'Il boss Hastings: "Tra sette anni saremo in un terzo delle case"', *la Repubblica*, 23 October 2015, p. 57 [my translations].

<sup>34</sup> In February 2017, the entire market of over-the-top pay platforms in Italy, with Netflix and its three main competitors (Sky Online/Now TV, Infinity, and TIMVision), comprised around 1.6 million subscribers. The estimated number of Netflix subscriber was then of about 570.000, a 36% share of the market (source: EY report, Spring 2017).

<sup>35</sup> On the French case, see *Après Netflix*. For Germany, see 'Netflix – zwischen Mythos und Realität'; 'Invading Europe'.

December 2016, also Amazon Prime Video was launched in Italy, as well as in other countries. Here, building on the already wide-established reputation of the company, and on the large pool of Prime package subscribers, the entrance was slow, without big announcements, following a step-by-step implementation of features and contents, in order to ‘naturalize’ the service as much as possible; as a result, the press coverage was limited, mostly focusing on Amazon as a multi-faceted company. However, Netflix Italia’s noisy entrance in the market constitutes an important promotional strategy for a ‘real’ newcomer, without previous connection to the national industry, which could also easily be adopted, reshaped, or maybe exploited, by other possible global new players.

In an increasingly interconnected world — especially in the media and communication industries, with constant transversal changes and a strong circulation of discourses — promotional activities must always consider and constantly adapt to what has already happened, including elsewhere. The announcement and launch of Netflix Italia was built on a previously established brand and on its awareness, image, and ‘behavior’ in the US and in other countries, especially in Europe, resulting in much distortion and oversimplification, as in the building of a shared transnational rhetoric. Even before the platform officially arrived, Italian viewers already had an idea of what to expect, based on the US and foreign practices and discourses. The promotional effort not only expanded this but also mediated and bridged the gap between the huge expectations and the actual experience of the service. By carefully shaping its Italian debut, Netflix’s production, distribution, and promotion professionals — some part of the company, others at a national press-office and PR service — could then exploit this established positive brand value. They mainly adopted a highly enthusiastic globalist rhetoric relating to digital media and Silicon Valley, partially tempered only by some references to the Italian media system and imagery. This kind of rhetoric spread across large swathes of the national television and media landscape, social media (already thirsty for news), and the entire journalism world. This also helped to raise high expectations about both the platform and its ability to disrupt a national TV market, connecting directly with the enduring controversies about its oligopolistic nature and its need for profound reform.<sup>36</sup>

Despite the perpetual mantle of disruption and revolutionary rhetoric surrounding Netflix — actively constructed, as demonstrated, by the company itself — the on-demand platform constitutes a complementary new resource for national and global audiences. At the same time, precisely when it appears to

<sup>36</sup> On the history of Italian TV and its numerous conflicts, see Aldo Grasso, *Storia della televisione italiana* (Milan: Garzanti, 2004); Franco Monteleone, *Storia della radio e della televisione in Italia* (Venice: Marsilio, 2004); Irene Piazzoni, *Storia delle televisioni in Italia* (Rome: Carocci, 2014); *Storie e culture della televisione italiana*, ed. by Aldo Grasso (Milan: Mondadori, 2013); Enrico Menduni, *Televisione e società italiana* (Milan: Bompiani, 2002); Peppino Ortoleva, *Un ventennio a colori. Televisione privata e società in Italia* (Milan: Giunti, 1998); Paul Ginsborg, *Silvio Berlusconi: Television, Power and Patrimony* (London: Verso, 2005).

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eliminate at least some intermediaries, providing the viewers with direct access to a large pool of audio-visual content, it also acts as an intermediary force at a technological, economic, and editorial level. Moreover, as Netflix tried to insert and position itself in the Italian national media scenario, through communication and promotion, several different yet interrelated layers of mediation between distinct forces inevitably emerged, highlighting the crucial role of several primary and secondary actors in shaping the service's brand image and in connecting it to and engaging the target audience. Each of these forces follows its own rules, practices, and (editorial and promotional) logic, in an intricate network of actions and reactions, 'baits' and source materials, biases and traditional professional cultures. Together with Netflix itself, which constitutes the initial layer of mediation, setting timeframes and managing information and exclusives, the journalists and opinion leaders (online, in the press, and in broadcasting) work as special (added) intermediaries, first as anticipators and trend-setters, then later expanding — often uncritically — on the company's publicity stunts, actions, and rhetoric. Following journalistic logic of exclusivity (the 'scoop') and newsworthiness (news values as unexpectedness, meaningfulness for the national audience, conflict and competition), they shaped the discourse according to the company's lead and spin, at the same time positioning themselves towards their own competition and tailoring the news according to their audience's expected tastes and needs. Ministries and other national institutions are necessary stakeholders for the company to engage when entering a market; however, their regulatory role (often delegated to the European Union) appear mostly to have a discursive value, indirectly reinforcing the promotional efforts. In this case, a logic of double legitimation appears, with Netflix securing a strong connection with the Government, while the latter can position itself as a privileged interlocutor of a huge, highly-valued global company. Even the market competitors — both broadcasters and over-the-top operators already present in Italy — adopt the hype surrounding Netflix's communication, with some provincialism, adding some adverse remarks that nonetheless never question the launch's importance or strong future impact. Here the adoption of a common-sense approach to a complex phenomenon mixes with a negative view on possible change inside the market and with the request of external help (especially from the government) to sustain national ownership and local production. The redefinition, and proliferation, of intermediaries leads then to a common, shared 'spreadable' enthusiasm, an exponentially-growing hegemonic discourse that is perfectly coherent with the classic media logic of newsworthiness and the professional practices of promotion, and also rather contagious to the entire media system, competitors included.

The promotional and discursive path towards Netflix's Italian launch, moreover, exemplifies the service's winding, 'bumpy' road into the major continental European markets, which already had a strong tradition of original television production and a competitive environment with many channels. After Netflix's partially disappointing debuts in both France and Germany, following

a similar series of announcements and marketing efforts along an anticipated timeline, in Italy — and, to a lesser degree, in Spain — some hesitant counter-balances were tentatively added to curb the enthusiastic rhetoric of revolution and disruption. However, the promotion and branding cultures struggled to accept such distinctions and precautions, resulting in a communication that focused more on hype-building than on the actual technology and catalogue. Netflix Italia took particular care to steer the public discourse and to guard against potential damage, but that is less a specific feature of the market and more a concrete example of how the company, its professionals, and its publicists learned from experience and sought to establish a model that could be followed in the subsequent worldwide expansion. The enthusiastic sense of global revolution, then, combined with a more careful, step-by-step market entrance, in dialogue with all the stakeholders.

During the Italian launch, the promotional culture and its discourse built, established, and maintained a strong — and particularly functional — polarization between the hype and the reality of the service, forced as it was to deal with strong, established television systems, with role redefinitions and historical specificities. The struggle between the expectations, raised directly by the company and indirectly by all the surrounding discourse, and the actual first few months of operation in Italy prompted a recalibration of previous hopes, with a more varied, even cynical and detached, online commentary and a ‘normalization’ for balance and restraint on most mainstream media. In the first months, the attention was (also) on the limited extent of the catalogue (especially regarding films and national production), on the lack of some license rights (including landmarks as *House of Cards*), and on impossible requests like the availability of the new episodes of US network and cable TV series. Later on, as soon as the service features were clearer and the library slowly increased, Netflix Italia’s promotion not only concentrated on opinion leaders and early adopters (with a handful of live events in Milan, Rome, or Lucca), but also on the larger mass audience, with promos shown inside national networks’ programming and connections to Italian media events and personalities (i.e. the *Festival di Sanremo*, or web star Fabio Rovazzi). After the promotional tricks and efforts, only the hands-on approach by the general audience and the several intermediaries, as well as a recalibrated communication, could shape a more nuanced, complex, and multi-faceted perspective on the Netflix brand, and the huge phenomenon surrounding it.