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Between the programme and the portal: Thinking about the future of transnational TV branding

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Introduction

Branding is often described as the defining industrial practice of television's recent past (Johnson, 2007). As the frames that manage the interactions between viewers, content and producers, television brands operate at multiple levels (Johnson, 2012). Typically, scholars address these different levels as distinct practices. For example, the channel-as-brand model posits that strong channel brands help develop viewer loyalty and are crucial to commercial success in an increasingly competitive market. In contrast, the programme-as-brand model focuses on the ways in which the brand identity of a particular show can generate value across a range of cultural and mediated contexts. Yet thinking about these strategies in isolation becomes increasingly difficult in a transnational context (see Wayne, 2016).

In this short piece, I propose that the increasing interpenetration of national and global television industries has created the need for new, more flexible ways to think about TV branding as an industrial practice that exists in the spaces between the programme, the channel and the portal. To support this claim, I use the branding strategies of two multichannel providers in Israel to highlight some of the ways in which national and global contexts overlap. First, I describe the strategy of legacy multichannel provider YES as they attempt to rebrand themselves as sellers in the global market. Second, I describe brand strategy of Partner TV, a new 'over-the-top' (OTT) multichannel provider, who has relied on Netflix's global brand to establish a foothold in the local market. Taken together, the ways in which these national multichannel providers market

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themselves globally or utilise global brands locally demonstrate the need for new vocabularies to better describe emerging transnational television branding practices.

National brands in the global TV market

Historically, the pay TV market in Israel has been dominated by two companies: the cable provider HOT and the satellite provider YES. In 2013, for example, HOT controlled 60% of the market, while YES controlled the remaining 40% (Bezeq, 2016: A-129). Beyond their role as multichannel providers, these companies are also two of the country's largest content producers. As a result of a regulatory system designed to support Hebrew-language programming, both HOT and YES are required to spend 8% of their annual revenue producing local content. Since 2015, however, the market has become increasingly competitive with the entrance of several unregulated OTT providers. As a consequence, HOT and YES have experienced significant subscriber loss as these new players have quickly acquired more than 10% of the market.

One of the ways YES has sought to offset declining subscriber revenue has been to increase their presence as a seller in the global television market. Between early 2016 and mid-2017, YES sold several shows to global SVOD portals under a variety of different arrangements. In late January 2016, Netflix purchased its first Israeli television show – *The Greenhouse* (2012–16), a Nickelodeon and YES co-production aimed at teen audiences. In October 2016, Amazon purchased the rights to adapt *Shtisel* (2013–16), a drama centred on an ultra-Orthodox family living in Jerusalem. Less than a month later, Netflix acquired the international distribution rights for the first season of the drama series *Fauda* (2015–). In the press, YES executives have used these deals as an opportunity to position the company, previously known as a content buyer, as part of the broader Israeli television industry widely recognised for its outsized role as a global content seller (see Shahaf, 2016). For example, Danna Stern, vice president for acquisitions, channels and programming at YES, explains the success of Israeli series in international markets as a function of local production realities. As a result of small budgets and tight broadcasting regulation, she says, 'The stories need to be much tighter, the drama is closer and more intense – that is the key to creativity in this country' (Reed, 2016). This comment clearly draws on the established collective branding of the Israeli television industry built by content exporters like Keshet or Dori Media Group who have been selling successful formats to diverse markets for more than a decade.

Yet, as a multichannel provider from a small national market, YES' efforts to create a global brand and successfully pivot from content buyer to content seller complicate the typical categories associated with television branding as an industrial practice. How should we understand the brand identities of multichannel providers, as they exist in multiple commercial contexts? In the context of the Israeli pay television industry, it seems safe to say that YES is both a producer of local content and a content aggregator bringing a variety of local and international channels to customers. But what can we say about YES as a content seller in the global market? Is YES now a channel? Is it an independent producer? As more national television companies begin to chase the seemingly endless content budgets of Netflix and Amazon, understanding the branding practices of these new players in global spaces will become increasingly important.

Global platform brands in the national TV market

As YES worked to rebrand itself for the global market, another multichannel provider in Israel has been heavily relying on a well-known global television brand to establish itself in the local market. The relationship between Partner TV, the unregulated OTT television platform backed by Partner Communications (one of Israel's largest mobile phone operators), and Netflix began in May 2017. In the months leading up to Partner TV's launch, it was clear the service's brand strategy was dependent on its ability to claim that it would 'be the first telecommunications company in Israel to offer the Netflix service on its set-top box' (Partner Communications, 2017). However, it remained unclear what exactly the relationship between these two companies would offer consumers. Netflix had first entered the market 18 months earlier as part of the company's broader global expansion, but the portal's initial appeal among Israeli consumers was limited by a variety of factors including a small content library and the lack of a Hebrew-language interface (see Wayne, 2017). Furthermore, industry sources were telling reporters that Netflix was in the process of creating a Hebrew-language user interface and translating large amounts of content well before their deal with Partner became public (Perez, 2017).

When Partner TV launched in late June 2017, as expected, it was the first multichannel provider to offer Netflix to Israeli consumers. Initially, however, this OTT offering included linear channels and VOD content at a base price of 69 shekels (approximately US$19) per month with access to Netflix costing an additional 20 shekels (approximately US$5) per month (Scheer, 2017). As the cheapest regular Netflix subscription was priced at 40 shekels (approximately US$10) per month, Partner TV was essentially offering consumers half-price Netflix subscriptions. At the same time, Netflix announced several changes aimed at expanding the portal's appeal among Israeli consumers including more local content and a Hebrew-language interface. Over the next few months, it became clear that this partnership required Partner to heavily promote their association with Netflix and manage all of Netflix's local billing. Yet Partner TV also had a significant amount of flexibility regarding the economic specifics of their Netflix promotions. By early September, Partner was no longer offering half-price Netflix subscriptions. Instead, new subscribers were offered 6 months of 'free Netflix'. No matter the terms, with the Netflix button on the service's devices and its content prominently embedded throughout its promotional materials, it was clear that Partner TV's brand was directly tied to Netflix. And the available evidence indicates that this strategy has helped Partner TV establish itself in the Israeli pay television market. The new service signed up more than 60,000 subscribers in its first 6 months of operation (Habib-Valdhorn and Perez, 2018).

Setting aside the success of this strategy, Partner's use of Netflix's brand in a national market does not fit the traditional conception of television branding and raises a broader question: How should we understand formal relationships between national multichannel providers and global SVOD portals? Certainly, such partnerships challenge the common assertion that the global expansion of Netflix and Amazon is detrimental to national television industries. Instead, these relationships indicate that global SVODs might well be helping to develop some parts of a national television industry at the expense of others. At the same time, these arrangements call in question the notion that Netflix is an exclusively global brand. Yet it seems that we lack the vocabulary to make sense of television branding in these spaces where global brands and national brands interact.

Conclusion: Between the programme and the portal

Although it is reasonable to ask what the branding practices of Israeli multichannel providers tell us about the state of transnational television, at the moment, YES and Partner TV can only draw our attention to the complexity of TV branding outside the familiar categories of the programme, the channel and the platform. It is too early to say whether these strategies represent emerging transnational television branding practices more broadly. Nonetheless, as scholars, our ability to understand branding as television's defining industrial practice will increasingly depend on the degree to which we can effectively address a wider variety of strategies across multiple geographic and commercial contexts.

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