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Netflix original series, global audiences and discourses of streaming success

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Abstract
This article examines the discourses of streaming success within the television industry by focusing on Netflix and two of the service's original series: *Fauda* and *La Casa de Papel*. Using publicly available secondary data through 2019, this analysis argues the transnational platform's efforts to redefine successful television while maintaining a high level of data secrecy necessitate the discursive construction of a global and undifferentiated audience. Yet, rather than representing a break with the past, the discourses of streaming success reveal Netflix to be a television institution attempting to address traditional industry challenges.

Keywords
Television industry, global television, streaming, Netflix, *La Casa de Papel*, *Fauda*, media industry studies

Introduction

At an industry roundtable in August 2016, Netflix's Chief Content Officer Ted Sarandos observed that the traditional standards which define successful television are meaningless for streaming platforms. Citing the example of Marco Polo (2014-2016), he noted that the big-budget historical epic was 'hugely popular all throughout Asia and Europe' (The Hollywood Reporter, 2016). Given Netflix's subscriber-based economic model, the series' lack of popularity with American audiences and its harsh reception by television critics were 'really irrelevant because it's doing exactly what it was supposed to

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do' (The Hollywood Reporter, 2016). Nonetheless, 4 months later, Netflix cancelled the show after just two seasons, taking a reported loss of US$200 million on the project (Goldberg, 2016). In a broader industrial context where streaming viewership data remains largely hidden, the disjuncture between Sarandos' claim that *Marco Polo* was performing 'exactly' as intended and its ensuing cancellation raise several questions about success in the age of streaming.

To explore these issues, this article examines television industry discourses of streaming success as related to Netflix and two of the platform's popular global originals: the Israeli military action series Fauda (2015) and the Spanish heist series La Casa De Papel (2017). Applying a media industry studies approach (Herbert et al., 2020) to a variety of publicly available materials, this study finds that executives and creative talent employ different discourses of streaming success. Netflix executives describe success in terms of series that 'travel' as a result of high production values and 'local authenticity'. For creative talent, global popularity stems from local authenticity, morally ambiguous characters, universality and topical narrative content. In spite of these differences, however, both executives and creatives largely describe the Netflix audience as global and undifferentiated. Yet, by analysing the instances in which audiences are discussed in more narrow terms, this article argues that the discourses of streaming success only operate at a general level and, in fact, become incoherent when addressing the popularity of particular Netflix original series among socially situated viewers.

Ultimately, this research contributes to the growing body of scholarship addressing Netflix's use of 'streaming lore' (Burroughs, 2019) as part of the company's broader efforts to redefine the characteristics of successful television series in the context of transnational platforms and global audiences. In one sense, the emergent discourses of streaming success represent significant continuities between the medium's past and present. The television industry has long discursively produced the audience through measurement in their efforts to manage uncertainty (Ang, 1991). As a re-articulation of existing industry lore, however, these contemporary discourses strip audiences of even very broad characteristics including national identity and demographic segmentation. The audience that remains, the discursively constructed Netflix audience, is global, undifferentiated and representative of the company's attempts to monopolise the ability to define popular television in the streaming era.

Defining successful TV

Historically, commercial broadcasters in the United States of America defined success in terms of advertising revenue. In Gitlin's (1983) seminal analysis of network executives, he offers the following assertion from Arnold Becker, then vice president for television research at CBS, 'I'm not interested in culture. I'm not interested in pro-social values. I have only one interest. That's whether people watch the programme. That's my definition of good, that's my definition of bad' (27). This statement is indeed representative of the dominant conception of success throughout the network era when a programme's popularity was determined retroactively by Nielsen audience ratings. These ratings, which cannot be considered research in an academic sense (Meehan, 1990), are based on a

variety of data collection methods including time diaries and monitoring devices known as 'people meters'. The company samples approximately 20,000 households which include approximately 50,000 individuals. Rather than reflecting an actual number of viewers at a given time, ratings are a currency for the economic transactions between advertisers and networks establishing the cost of advertising spots during a given programme or time of day. Nielsen ratings remained central to conceptions of success even as the growth of cable and satellite television led the industry to pursue niche audiences. However, it should be noted that in the 1980s and 1990s ratings success with specific, targeted demographic groups became more important for some networks than success among general audiences (Feuer, 1984).

The only segment of the US commercial television industry to define success in other terms was premium cable. Subscriber-supported networks like HBO and Showtime did not feature traditional commercial advertising and instead generated revenue from viewers paying an additional monthly fee (a premium) for access to these channels. As a result, the discourses of success associated with these networks were largely divorced from the ratings system and advertising revenue. Instead, what emerged was a conceptualisation of success grounded in multiple abstract notions including critical acclaim, 'buzz' and 'quality.' The network most closely associated with such alternative discourses of success is HBO, which introduced its famous marketing slogan 'It's Not TV' in 1996. Since then, the network has cultivated a brand identity as the home of quality television that drew on a wide range of its programming but was primarily centred on the shift towards producing adult, edgy, authored and high-budget original drama series (Johnson, 2012: 28–34).

While HBO's brand was initially constructed through the promotional efforts of the network itself, and then increasingly depended on signature shows to stand in for the network, it also increasingly relied on critical acclaim and industry awards, in particular the Emmy Awards given by the Academy of Television Arts and Sciences, to support its claim to be the home for creative talent. As a host of scholars have noted, however, HBO's marketing strategy and the discourses of success it promotes rely upon the long-standing marginalisation of television and its audiences (Feuer, 2007; McCabe and Akass, 2007). Specifically, the network invokes the rhetoric of 'quality TV' to assert the medium's progress and place it in the same cultural category as cinema or literature. This rhetoric has been very effective. Original series produced by premium cable networks accrued more prestige in the first decade of the twenty-first century than any other type of programming and helped redefine successful television in cultural and commercial terms.

Once it started producing original series in 2011 and began moving away from its origins as a DVD delivery service, Netflix largely followed HBO's model to establish its brand identity. For example, in giving creative and budgetary freedom to television 'showrunner-auteurs' like Mitch Hurwitz (Arrested Development, 2003-2006, 2013-2019) and Jenji Kohan (Orange is the New Black, 2013-2019), the service attempts to create a brand identity where quality content helps construct the brand by drawing attention to the artistic status of television as an authored text (Newman and Levine, 2012: 39). In addition, Netflix uses the discourse of quality TV in relation to technological progress and emerging modes of audience engagement. In working to define its

'programming against traditional television,' Tryon (2015) argues that Netflix echoes HBO branding strategies by reconceptualizing 'streaming as a more engaging form of television, one that exists on a technological and cultural cutting edge' (106). In particular, the company often emphasises binge-viewing as a mode of audience behaviour that improves upon traditional television's liveness and linear scheduling. As a producer and distributor of original content, Netflix has much to gain through its association with binge-able programming. As Jenner (2015) observes, 'supposedly "binge-able" texts also legitimise the viewing practice, and thus the medium: if viewers stand to earn valued cultural capital, it is socially acceptable to binge, rather than watch several hours of scheduled television' (305).

In the years following House of Cards' (2013–2018) premiere, Netflix also followed HBO by relying on quality-based discourses to publicly address the success of its signature series. For example, Sarandos claimed that the service's 14 Emmy nominations in 2013 (nine for *House of Cards*) represent a 'leveling moment. Change comes very slow, but Emmy voters recognised that great television is great television, and they didn't pay attention to how it got there. It really validates Internet television as a viable form of the highest-quality entertainment' (Levin, 2013). Indeed, throughout this period, Netflix executives continued to invoke quality TV tropes when discussing original series. When the service commissioned *Marco Polo*, Sarandos praised the show's 'cinematic ambition' and expressed his belief that the show would be 'a fantastic addition to our slate of original series, both because of its quality and because it is the kind of gripping action-adventure that Netflix members love' (Maglio, 2014). Yet, as Netflix continued to expand its international presence and eventually entered 130 new territories in January 2016, success increasingly came to be conceptualised in global rather than North American terms. Now operating in more than 190 countries, Netflix's discourses of streaming success have become increasingly complex and this article begins to unpack this complexity.

Methods

To understand discourses of streaming success, this research examines a variety of publicly available secondary data from sources including trade press articles, press releases, trade and popular press interviews, videos of industry roundtables, promotional appearances and 6 years of Netflix's quarterly earnings call transcripts (2014-2019). This data are analysed through two of the methodological frameworks associated with media industry studies (Herbert et al., 2020; Perren, 2015). First, this research uses elements of the production culture (Caldwell, 2008) approach to examine common meanings and values expressed by media executives and creative talent. This perspective focuses on the ways industry knowledge regarding texts and audiences circulate thereby providing a useful complement to macro-level analytic approaches primarily concerned with political economy. Second, this article uses trade press analysis (Corrigan, 2018) as a means to access general television industry discourse and follows Burroughs' (2019) approach to understanding Netflix's particular articulation of streaming discourse. In combining industry and discourse analysis, Burroughs uses notions of streaming to highlight moments of continuity and rupture characteristic of the ongoing negotiations between new and old media. Although media

industry trade publications and materials are a commonly used data source in media and communication research (Kosterich and Napoli, 2016), the use of these sources is hardly straightforward. As scholars note, it is necessary to approach trade press material critically and to be cognizant of the inherent limitations associated with such data (Perren, 2015). With such issues in mind, this article initially identifies the discourses of streaming success forwarded by Netflix executives as they attempt to reframe popular television in global terms. Throughout the variety of secondary data used in this research, explicit discussions of success and popularity are common and most dominant themes emerging from these discussions are readily identifiable as a result of creative talents and media executives' tendency to repeat similar talking points to multiple journalists.

We then focus in on how the discourses of streaming success are used in relation to two specific Netflix global originals: *Fauda* and *La Casa de Papel*. *Fauda*, whose title means chaos in Arabic, is an Israeli television series created by Lior Raz and Avi Issacharoff. This action series draws from the creators' experiences as soldiers in the Israel Defense Forces. Raz also plays the show's main character, Doron Kabilio, who is the commander of an undercover counter-terrorism unit operating in the Palestinian territories. Not surprisingly, *Fauda*'s narrative is situated within the broader social and cultural context of the Israeli–Palestinian conflict and the Israeli occupation of the Palestinian territories. *La Casa*, marketed to English speaking audiences as *Money Heist*, is a Spanish heist drama created by Alex Pina. The series premise is that a mysterious figure known as the Professor, played by Álvaro Morte, recruits a team of eight individuals (who are given different world cities as code names) to stage elaborately planned robberies of public monetary institutions, including the Royal Mint of Spain (seasons one and two) and the Bank of Spain (seasons three and four). Set in the aftermath of the 2007–2008 financial crisis, the show is often seen by critics and other observers as expressing a variety of anti-capitalist perspectives during a time of increasing austerity (Schleich, 2020).

The decision to examine the discourses of streaming success related to *Fauda* and *La Casa* as specific examples of Netflix originals is a function of two important similarities. First, both of these series were initially produced for national audiences before Netflix became involved as a co-producer. In November 2016, Netflix acquired the international distribution rights for the first season of *Fauda* from Israeli satellite television provider Yes and later became a co-producer for the subsequent seasons of the series (Wayne, 2020: 34–35). In late 2017, Netflix acquired *La Casa* which was originally created for the linear service Antena three by Vancouver Media and Atresmedia. As Castro and Cascajosa (2020) note, Netflix reedited the material which was later distributed as Part One and Part Two in order to conform to the international norms of episode length (157). Yet, the degree to which *Fauda* and *La Casa* are representative of Netflix originals as a category is an open question. This ambiguity stems from Netflix's use of the label 'original' which differs substantially from that of traditional television networks. As Lotz and Havens (2016) observe, much of what this SVOD promotes as original content is more accurately described as exclusive in a particular market. According to Wayne (2018: 735), Netflix actively conceals the production origins of licensed content to better position the service as the audience's primary point of identification. Some scholars argue that series commissioned, produced, and initially distributed by a traditional television

network, like the BBC's Happy Valley (2014), which are then acquired and distributed in other markets as a Netflix 'original' should be classified as 'false originals' (Petruska and Woods, 2019). Although the distinctions between Netflix and traditional networks in the use of the label 'original' are significant, such distinctions are not explicit within discourses of streaming success. As such, a thorough interrogation of such issues is outside the scope of this analysis.

The second important similarity is that both *Fauda* and *La Casa* are known to be popular with global audiences. Netflix calls *Fauda* a 'global phenomenon' (Heller, 2018) and executives describe *La Casa* as 'a phenomenal success' (Netflix, 2019a). It should be noted, however, that there is significantly more public information regarding the size of *La Casa*'s audience. For example, the show's third season was viewed by more than 34 million Netflix subscribers during the first 7 days following its premiere in late July 2019 (Hopewell and Lang, 2019). At the time, Netflix defined a series 'view' as when a subscriber account had watched 70% of one episode (Koblin, 2019). For films, a view was defined by an account watching 70% of the total run time including credits (Alexander, 2018). The practice of selectively releasing such data for a very limited number of Netflix original properties began in late 2018, as part of the company's efforts to demonstrate the popularity of its original film Bird Box (2018). Although the release of any audience data was a departure, the company's refusal to comment on viewers' geographic locations and continued unwillingness to publicise viewing data for the vast majority of its content library reflect the reality that anti-transparency policies were still very much the norm throughout 2019. As such, this article examines streaming success during a period in Netflix's history characterised by a lack of data transparency with a few notable exceptions.

The findings generated by this analysis are presented in three sections. The first section details the discourses of streaming success employed by Netflix executives with regards to an undifferentiated global audience. Of course, it is known that Netflix targets specific audience segments in a multitude of ways including its focus on 'taste communities' (Roettgers, 2017) which Lotz (2017) describes as representing the company's conglomerated niche strategy or its efforts to enter particular national markets as detailed by Lobato (2019). Yet, as demonstrated below, in the discourses of streaming success executives offer, these actual audiences are not addressed but rather replaced with discursive constructions of an idealised global Netflix audience. The second section examines the discourses creative talent (which includes writers, producers and directors) uses to explain the popularity of specific series. The third section considers instances in which discussions of popularity include comparatively narrow constructions of Netflix audiences. This article concludes by considering discourses of streaming success in light of Netflix's role as a television institution and offers some thoughts regarding the implications of this analysis for future scholarship.

Success travels

Netflix executives describe series that become globally popular as series that 'travel'. Regarding Narcos (2015-2017), Netflix's first globally successful non-English language series, for example, Vice President of Original Content Cindy Holland observes, 'If a

series resonates in its home market, it is likely to travel' (D'Alessandro, 2019). When discussing the characteristics of series that 'travel', executives frequently reference production value and authenticity. In the television and film industries, production value refers to value added through production (special effects, settings, costumes, etc.), rather than writing or acting. According to Netflix founder and Chief Executive Officer Reed Hastings, '[W]hat we've found is that these really big productions like The Crown (2016) are just terrific for us in global brand building. So we're very excited about being able to deploy the cash to create shows like that' (Netflix, 2016). As Sarandos observes, however, the relationship between high production value and global success of American popular culture predates Netflix. Adding to Hastings' comments about *The Crown*, he explains that 'big productions' like *House of Cards*, Stranger Things (2016) and The Get Down (2016-2017) are similar to 'big blockbuster films' in their ability to draw large domestic audiences. (Netflix, 2016). '[B]ut', Sarandos continues, 'they travel much better too. So you see in all these non-English speaking territories, these series performed very well' (Netflix, 2016). Of course, the absence of any discussion regarding what it means to perform well reflects Netflix's long-standing anti-transparency policies.

The other characteristic often associated with series that travel is authenticity. For Netflix executives, authenticity is understood as a reflection of the local culture in which a series' narrative is situated. Sarandos, for example, is explicit about the connection between global streaming success and local authenticity. During a quarterly earnings call interview, he explains:

> Well, we've kept one strict principle around it, which was that these shows have to be very locally relevant and to do that you have to be pretty authentically local. So [what] we're trying not to do is try to inauthentically make a global show, because just basically that doesn't work for anybody. So the more authentically local the show is the better it travels. (Netflix, 2019b)

Although the precise nature of the relationship between success and authenticity is often unclear as reflected in the above quote, this is a common talking point for Netflix executives. During a subsequent earnings call interview, Sarandos offers some elaboration noting that a series that travels needs to initially succeed among local viewers. To 'make a big splash around the world', he explains, a series must be 'super authentically local and really satisfying for the viewers, starting in the home country and then expanding around the world' (Netflix, 2019a). Yet, the reasons behind this purported pattern of success, first local audiences then global audiences, are not addressed.

Nonetheless, these comments do not imply that all authentically local shows travel. In some unspecified cases, Sarandos notes, 'It's interesting, some shows, because they are hyper-local in the topic that don't travel, but do incredibly well' (Netflix, 2018). In this instance, he is describing shows that are seen by 40–50% of subscribers in a specific national market but nonetheless fail to attract audiences elsewhere. Within the discourses of Netflix executives, however, the ability of a series to travel is unrelated to the identity of the local culture being depicted authentically. According to Erik Barmack, former Vice President of international originals:

> We know we need to find the best storytellers in the world wherever they are. The big shocking moment was that when we found good shows outside the U.S., they have not only been hugely impactful for the local region but also travel[l]ed. (Hopewell and Lang, 2018)

He adds, 'Any country that has great writing and acting can create a global franchise' (Hopewell and Lang, 2018). Of course, localizing original series for a given market is also associated with success. But the labour of localisation including dubbing or subtitling to match the expectations of local audiences is seen as part of the broader distribution process, not a characteristic of particular series.

In a theoretical sense, the importance Netflix executives ascribe to production value and authenticity simultaneously confirms and complicates scholars' understandings of global television flows. On one hand, the connection between high production values and the likelihood that a series will travel is in line with Hoskins and Mirus' (1988) notion of cultural discount. They argue that high production values, among other factors, explain the historical dominance of US television content in the global market despite national audiences' preferences for local content. On the other hand, the relationship between local authenticity and global popularity of Netflix originals seems to challenge Straubhaar's (2007) arguments regarding the importance of cultural proximity. As Esser (2020: 39–40) notes, the popularity of non-English language content from smaller national markets runs counter to scholarly claims that cultural specificity is a barrier to international appeal. As such, the prominence of authenticity within the discourses of streaming success offered by Netflix executives, coupled with increased investment in local drama series intended for transnational audiences, indicates an emerging divergence between industry wisdom and dominant academic understanding of global television flows.

Authenticity, moral complexity, universality and topicality

Like the service's executives, Netflix's creative talent understands the success of their series in terms of local authenticity, although they tend to do so in more specific terms. For example, Lior Raz, co-creator of *Fauda* and series lead, explains, 'Authenticity was our main concern in everything, in every aspect of the show. It was about the art, about the clothes, about the casting, everything' (Youtube, 2018). Later in the same interview, *Fauda*'s other co-creator, Avi Issacharoff explicitly links authenticity to success, noting that the show's popularity 'shocked us at the end of the day' (Youtube, 2018). He elaborates, 'It really shocked us that it became successful in the world, not only in the USA, but also in other parts of the world. And for us one of the major things was about being authentic' (Youtube, 2018). Similarly, *La Casa*'s creator and showrunner Alex Pina asserts, 'Latin identity is important and is part of the personality of the show' (*Noticias*, 2019). Despite the show's popularity among international audiences, the series still includes 'very local references from Spain' (Noticias, 2019). According to executive producer and director Jesus Colmenar, however, these local references can create difficulties for global distribution. He recalls, 'there have been times when the translators of the series have come to us asking what something in particular means. And we explained to them that "pimba, pimba, pimba!", for example, has no translation. It is a Spanish thing'

(Muela, 2019). Yet, in line with Netflix executives' comments regarding local authenticity, there is no indication that this sort of local reference was altered to better accommodate the process of global distribution. This differs substantially from the traditional industry understanding of successful global television evidenced by 'strategic efforts to internationalize (or deculturize) narrative content to enhance portability across cultural borders' (Bielby and Harrington, 2008: 89).

The creative talent behind Netflix originals also explain success in terms of viewers' connections to morally ambiguous characters. Since the debut of *The Sopranos* (1999–2007), dramatic narratives featuring anti-heroic protagonists have become increasingly common on television (Wayne, 2014). Unlike traditional heroes who lack moral flaws, anti-heroes and morally ambiguous characters more broadly evoke ambiguous, conflicted or negative moral responses from the audience. In *La Casa*, Pina explains:

> All the characters, they are anti-heroes, antagonists. And as the plot develops, the audience realizes they are very relatable. That's how the audience becomes addicted to the characters, because of the way they are developed. There's no good or bad; it's up to the audience to decide. (Pickard, 2018)

Esther Martinez Lobato, one of *La Casa*'s writers and an executive producer, notes that this moral ambiguity is an intentional creative choice. She explains, 'We can't compete with the American industry's resources, so we said: "Let's focus on the characters." The strength of *La Casa de Papel* is not only in its thriller or action elements, but in its characters' emotional development' (Hopewell, 2018). Raz similarly describes the moral ambiguity of *Fauda*'s characters as central to the show's popularity. Discussing Abu-Ahmed (played by Hisham Suliman), the antagonist in season one, he explains that the character is 'a terrorist that killed 160 people … but I wanted to show him as a round character not just a flat character. So in our show he has family, he loves his kids, he loves his wife' (Youtube, 2018). As a consequence, the audience is able to relate and find the character 'very lovable' (Hopewell, 2018). Indeed, as Perks (2014) observes in her analysis of 'media marathoning' viewers, morally ambiguous narratives 'potentially offer a great reward to readers willing to muddy their conceptions of right and wrong' (172). Nonetheless, the focus on moral ambiguity also draws on the broader discourses of legitimation which reinforce classed and gendered cultural hierarchies (Newman and Levine, 2012).

Two additional themes that appear in the discourses of streaming success offered by creative talent are universality and topicality. When explaining the success of *La Casa* in topical terms, Pina connects the series' popularity to specific conditions produced by 2008's global economic crisis. After living through the ensuing years of austerity, audiences are 'disappointed with governments and central banks' and the show's characters stealing from financial institutions 'are a sort of pennant in this atmosphere of general disappointment' (Marcos, 2018). Surprisingly, *Fauda*'s creators often frame the show as successful in spite of its subject matter. Discussing the series' global success, Issacharoff recalls that he and Raz were initially sceptical that international audiences 'would watch a show in Arabic and Hebrew if they were not Israelis or Palestinians and didn't know about

the situation [the conflict/occupation] here in Israel' (Pickard, 2020). Nonetheless, he explains, 'People just connect to the story and the characters, and that's what's amazing' (Pickard, 2020). In framing *Fauda*'s success in relation to its topical subject matter, Issacharoff mirrors some observers who assert that the show's international popularity is a consequence, in part, of global interest in the politics of the Middle East (Ribke, 2019).

Alongside this emphasis on social relevance, creatives also frequently reference the universal appeal of narrative or generic features in their discussions of success. During a Q&A session at an industry event, for example, Pina explains, *La Casa* 'was a once in a lifetime experience in terms of global appeal! All our series talk about emotions, and emotions are universal, and that's the appeal of the show' (Martin, 2018). Danna Stern, the managing director of Yes Studios who originally commissioned *Fauda* and negotiated its sale to Netflix, similarly connects universality to popularity noting that, 'Action is almost universal and that always plays well' (Pickard, 2020). These comments, as Bielby and Harrington (2008: 54–55) observe, reflect long-standing industry logic that connects global popularity to notions of universal appeal. As Knox (2013) notes, however, scholars are often hesitant to address transnational flows of television content in terms of universality as a result of historical tendencies to ground the concept in socially privileged (white, Western, male) perspectives. Despite such hesitancy, some academics observe that globally popular content frequently includes elements to which audiences from a variety of cultural backgrounds can relate (albeit in heterogeneous ways), as evidenced by prime-time soap operas (Liebes and Katz, 1990) and more recent reality formats (Stehling, 2013). Nonetheless, the presence of universality in creatives' discussions of streaming success represents a discursive continuity linking the industry's past to its present.

The discursive limits of streaming success

Although there are some points of overlap, the two previous sections highlight the ways in which executives and creative talent offer different discourses of streaming success. Nonetheless, executives and creatives alike rarely mention specific audiences when addressing the popularity of Netflix original series. Yet, in the limited number of instances when executives become more specific, this specificity only reaffirms the idealised construction of Netflix's unified global audience and the broad demographic appeal of Netflix original series. Speaking to members of the Chilean press, for example, current Vice President of International Originals Bela Bajaria says, 'We have noticed that our members in Chile are discovering shows from all over the world on Netflix every day. The audience loves the authenticity of the stories regardless of language or country' (Valdivia, 2019). She adds, 'As demonstrated by productions like Dark (2017), The Rain (2018), and *La Casa de Papel*, great stories can come from anywhere in the world and be loved everywhere' (Valdivia, 2019). Here, the mention of audiences in Chile functions as a means to reassert the unity of Netflix's global audience. Whatever distinctive characteristics a specific national audience might have, they are erased as that audience is collapsed back into a global viewership bound through their engagement with the service's original series.

A similar erasure appears when executives discuss the popularity of Netflix originals across traditional audience demographics. After the premiere of *La Casa*'s third season, Diego Ávalos, Vice President of originals in Spain, offers an interviewer a characteristic anecdote mentioning several specific audience segments without addressing actual viewership. He recalls, 'I remember being on a flight from [Amsterdam] to Madrid and looking at what people were watching on their screens. There was a lady of about seventy watching [the show]. And also a boy of 16. And an older gentleman' (Avendano, 2019). He continues, 'It was an airplane, a small space, but we already noticed that we couldn't plan the profile of the spectator of this series' (Avendano, 2019). Like Bajaria's reference to subscribers in Chile, referencing age and gender helps Avalos discursively construct Netflix viewers as a single, undifferentiated audience. Yet, it seems that the discourses of streaming success require this sort of rhetorical flattening that erases distinctive viewer characteristics. This becomes apparent in the limited public discussions that explicitly address the popularity of a Netflix original with a socially and culturally situated audience.

Since premiering on Netflix in December 2016, *Fauda*'s creators have often discussed the series' popularity with audiences defined in national and ethnoreligious terms. Speaking of the series' appeal for Israeli Jews and Israeli Arabs as an undifferentiated audience, for example, Raz invokes universality. Of the willingness to portray both sides of the Israeli–Palestinian conflict, he says, 'I think that's the secret of the show – everyone can connect to their narrative and find something to identify with' (Heller, 2018). When addressing Israeli Arab audiences specifically, however, the discourse shifts. After asserting that the series is 'the most viewed show in the Arab population in Israel', Raz explains this popularity by noting that the producers of *Fauda*, the most significant of whom are all Israeli Jews, 'honor [Israeli Arab's] language, we honor their narrative and we respect them' (Fox News Channel, 2018). Similar statements appear throughout popular and trade press coverage of *Fauda*. When an interviewer asks about the show's popularity with Palestinian viewers specifically, Raz responds:

> You know I was shocked actually because I didn't understand it in the beginning. Why they love it, but when the time go by [sic] I can understand that first of all we love their language. You know, I love their language. I love Arabic and I've loved the Arabic and we took care of their language in [a] very delicate way. We honored the language and we honor their narrative as well. It doesn't mean that I understand it, it doesn't mean that I accept it, but I honor them. (CBC Radio, 2017)

In other instances, he mentions viewers in the Arab world rather than Arab Israelis or Palestinians, but the explanation for success remains consistent.

Not surprisingly, a variety of voices have challenged these frequently repeated characterisations of audience responses to *Fauda* in the Arab world. For example, Sayed Kashua, a well-known Palestinian columnist for the Israeli centre-left daily *Haaretz*, rejects both the claim regarding the series' popularity and the claim that such popularity is related to the series' representation of the conflict. He writes:

> So, no: Arabs, Palestinians, Hamas members — those from the other side — do not love *Fauda*, and to be honest I'm not sure how many of them even watch it or have heard of it. And no, there is nothing in *Fauda* that addresses the reality in the territories. In *Fauda*, there are no rulers or ruled, no occupation, no historical background, no checkpoints, poverty, home demolitions, expulsions, settlers or violent soldiers. Nor are there courts that jail politicians without a trial and pass judgment on children and teens who are trying to push away armed soldiers. (Kashua, 2018)

Even if one is willing to presuppose that *Fauda*'s depiction of the conflict is acceptably realistic as dramatic television, a generation of empirical audience reception analysis indicates that Raz's claims about Arab viewers are reductive. In addition, ethnographic research conducted on the set of *Fauda* reveals that working conditions in the Israeli television industry reproduce the hierarchical relationships characteristic of Israel society more broadly, as members of the ethnic-national minority (Israeli–Palestinians) remain structurally disadvantaged in relation to members of the Jewish–Israeli majority (Jamal and Lavie, 2020; Lavie and Jamal, 2019).

Without minimising the deeply problematic elements involved, in the context of this analysis, the veracity of Raz's characterisations or the gravity of his mischaracterisations is less significant than the discursive limits that such attempts represent. A comparison between Raz's discussion of *Fauda*'s popularity among Arab audiences and Netflix executives' comments about broadly differentiated audiences is instructive here. In the context of the discourses of streaming success, a specific Netflix original series can succeed across multiple demographic audience groups as evidenced by Ávalos' anecdote about the wide age range of culturally non-descript individuals watching *La Casa* on a flight. Alternatively, Netflix originals, as a collective, can succeed with more narrowly constructed audiences like national ones as Bajaria claims regarding Chilean subscribers' enjoyment of original series from all over the world. What distinguishes Raz's comments regarding Arab audiences' responses to *Fauda* from those offered by Ávalos and Bajaria is his (unsuccessful) attempt to address the relationship between a particular Netflix original series and a socially situated, culturally specific audience. But, at this level of specificity, the discourses of streaming success breakdown to the point of incoherence. Assuming that *Fauda* is indeed popular (however defined) with Palestinian viewers, it is nearly unimaginable that the basis of that popularity, as Kashua and others convincingly argue, would be related to the ways in which an Israeli-produced television series about an Israeli army unit with an Israeli protagonist honours the Palestinian national narrative. As such, Raz's comments demonstrate the utility of replacing Netflix's actual audiences as they exist in various social contexts with the discursive construct of an undifferentiated global audience. Stripped of demographic characteristics and cultural identity, Netflix's constructed audience allows the company to define streaming success and explain the popularity of its original series on its own terms.

Streaming success and the future of popular television

Using the broad framework of media industry studies, this article examined television industry discourses of streaming success as related to Netflix within the context of

transnational platforms and global audiences through 2019. For executives, successful series 'travel', and the distinguishing characteristics of such series are high production values and local authenticity. Using *Fauda* and *La Casa de Papel* as examples of Netflix originals, creative talent understands success as stemming from a combination of local authenticity, the appeal of morally ambiguous characters, universal elements offering 'something for everyone' and topical elements that serve as additional points of audience identification. Despite these differences between the discourses of streaming success offered by executives and creatives, however, what is largely consistent is the construction of Netflix's audience as global and undifferentiated.

In some ways, this discursively constructed unified audience is a further enactment of anti-transparency policies regarding viewer data. For observers inside and outside of the industry interested in a better quantitative understanding of Netflix's audience, these policies are particularly frustrating. Executives, if they were willing, could provide much more substantive information regarding subscribers and their viewing behaviour. The platform's suggestion algorithms are supported by behavioural data for every individual subscriber. Yet, the size and demographic composition of *La Casa*'s audience in Poland on 22 May 2020 between noon and 1pm, for example, are unknown because it is in the company's economic interest that they remain unknown. In this sense, the discourses of streaming success are circumscribed by Netflix's unwillingness to publicise data regarding a specific audience, at a specific time, and in a specific place. Under different circumstances, a change in policy perhaps, it is possible that the discourses of streaming success could come to include such information. In 2019, Sarandos himself expressed an interest in providing more data transparency moving forward (Patten, 2019), and the service introduced daily top 10 rankings for the most popular titles by country in 2020. Yet, it is difficult to interpret the desire for greater transparency and the modicum of information provided by the daily rankings as substantive change. Furthermore, the symbolic weight of such gestures has already been undercut by Netflix's decision to change the definition of a view to any account that watches a given title for 2 minutes (Netflix, 2020: 4). As the company notes, this change is intended to demonstrate the popularity of their original programming and produces 35% more viewers on average than the previous (70% of a title) metric. Although the precise impetus for the introduction of this new viewing metric is not public knowledge, it seems likely that this change is the result of Netflix's desire to appear as popular as possible in the context of the increasingly competitive SVOD market following the launch of Disney+ in late 2019.

If, however, one seeks to develop a qualitative understanding of Netflix audiences and their relationships with specific original series, then no amount of transparency can overcome the discursive limits of streaming success. Industry discourse is neither intended to address nor is it capable of addressing the realities of how people watch television in the context of their daily lives or the complexities involved in understanding viewer engagement with televisual texts. The connective tissue that binds Netflix executives' belief that local authenticity is a significant component of global success to Raz's repeated assertion that *Fauda*'s popularity among Arab audiences is a result of honouring the Palestinian narrative is the fact that those within the industry do not actually

know why audiences engage with particular television content. Even in the age of streaming with the affordances provided by big data, advanced audience analytics, and extensive pre-release market testing, adequate explanations of success are as elusive as success itself. As such, the discourses of streaming success demonstrate the eternal truth of screenwriter William Goldman's (1983) claim that when it comes to success in Hollywood, 'nobody knows anything'.

Like traditional television institutions, Netflix continues to face the problem that the 'television audience' is a fictional construct that will always refuse definitive representation, discursively or otherwise (Ang, 1991). Yet, the discourses of streaming success are not merely a restatement of conventional industry wisdom. They are a re-articulation of industry lore 'within the slippery mediated terrain of post-network television and digital distribution' (Burroughs, 2019: 4), with significant implications for collective understandings of popular television. Despite its many well-known inadequacies ranging from the methodological problems associated with time diaries to the practice of undersampling viewers of colour, the Nielsen ratings system produced a shared currency for the television industry and provided the public with a tangible, if inaccurate, sense of American audiences. Even the ambiguous notions of success associated with quality television were given some shape by critical discourse and industry awards. In contrast, discourses of streaming success flatten the global audience and divorce popularity from observable viewer behaviour. Ultimately, then, the discourses of streaming success reflect a new response to 'the profound, structural uncertainty about the audience', which Ang (1991) characterises as 'the core predicament of the television industry' (43). Yet, through 2019, Netflix has solved this predicament by selectively releasing audience data, thereby monopolising the ability to define popular television in the context of global streaming platforms.

Moving forward, discourses of streaming success represent new challenges for scholars exploring global, internet-distributed television. As conglomerate-backed SVOD services like Amazon's Prime Video, Disney+ and HBO Max attempt to catch up with Netflix both in terms of subscribers and cultural influence, it seems likely that these discourses will become more common without necessarily becoming more substantive. In October 2020, for example, Amazon claimed that 'tens of millions' of viewers watched Sacha Baron Cohen's comedy *Borat Subsequent Moviefilm* over the course of its opening weekend (Spangler, 2020). Yet, these various services might well come to conceptualise success and discuss popularity in distinctive ways as a consequence of their differing content libraries and target audiences (Lotz and Lobato, 2019). What seems less likely, however, is that market dynamics will develop in such a way to incentivise data transparency for subscriber-based platforms. Nonetheless, there is little reason to approach discourses of streaming success and the increasingly unknowable realities of popular television they represent as a radical break from the past. As Katz observed nearly 25 years ago, 'With the rapid multiplication of channels, television has all but ceased to function as a shared public space' (1996: 22). Along these lines, future television industry scholarship can mostly usefully address the streaming age by discarding 'post-TV' thinking and, instead, seek to understand contemporary practices and discourses as extensions of the medium's past.

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