

Netflix's Global Strategy: An Analysis of the Geographical Distribution of Content from 2010 to 2021

Introduction

The rapid expansion of global media has significantly reshaped viewing habits and patterns of media consumption. Among these platforms, **Netflix** has emerged as one of the most influential players, offering a catalogue that spans a **wide range of countries, languages, and genres**. As a global business, geographical diversification of content has become increasingly important for Netflix, both to reduce dependence on a single region and to expand its international market reach.

Examining the geographic composition of Netflix's catalogue provides insight into how its content strategy has evolved over time. Changes in the balance between United States (US) and non-US productions may reflect broader trends in global expansion and localisation.

In this report, I analyse the **geographical distribution of Netflix content** from 2010 to 2021, based on a publicly available dataset of released titles. The analysis focuses on three main areas:

- (1) The concentration of the content among leading producing countries,
- (2) Trends in the distribution of US and non-US content over time,
- (3) Movie vs TV shows across major regions.

The central question addressed is: How diverse is Netflix's content beyond the United States, and how has this diversity evolved over time?

Dataset

The analysis is based on a publicly available dataset from Kaggle, *Netflix Movies and TV Shows* (Bansal, n.d.). The whole dataset has approximately 8000-9000 records, each representing a single Netflix title. The key variables used in this study are 'type' (Movie or TV series), 'release_year' and 'country'. These variables allow the visualisation of geographical distribution and the analysis of trends in Netflix's content over time.

Data Curation and Limitation

Although the dataset is generally well structured, several preprocessing steps were required to enable consistent geographical analysis.

The 'country' variable occasionally shows more than one country listed for a single title (for example, United States, India, France). To ensure consistency in classification, only the first country listed in each record was treated as the primary country of production. Moreover, a small number of titles contained missing country information, which were excluded from the analysis. However, the limited proportion of missing values is unlikely to materially affect the overall trends.

To examine global diversification, a binary indicator variable was created to classify productions as US or non-US for further analysis. Countries were subsequently grouped into broader geographical regions for comparison, thereby reducing fragmentation.

Television series are recorded as single titles regardless of the number of seasons. Accordingly, each movie and television series is treated as one unit of observation.

Several limitations should be noted.

- The listed country of production may not reflect the filming location or spoken language.
 - The dataset focuses solely on catalogue composition, rather than actual viewership or subscription.
 - The release year was used rather than the date on which the title was added to Netflix.
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Global distribution of Netflix content across countries

Who dominates the catalogue?

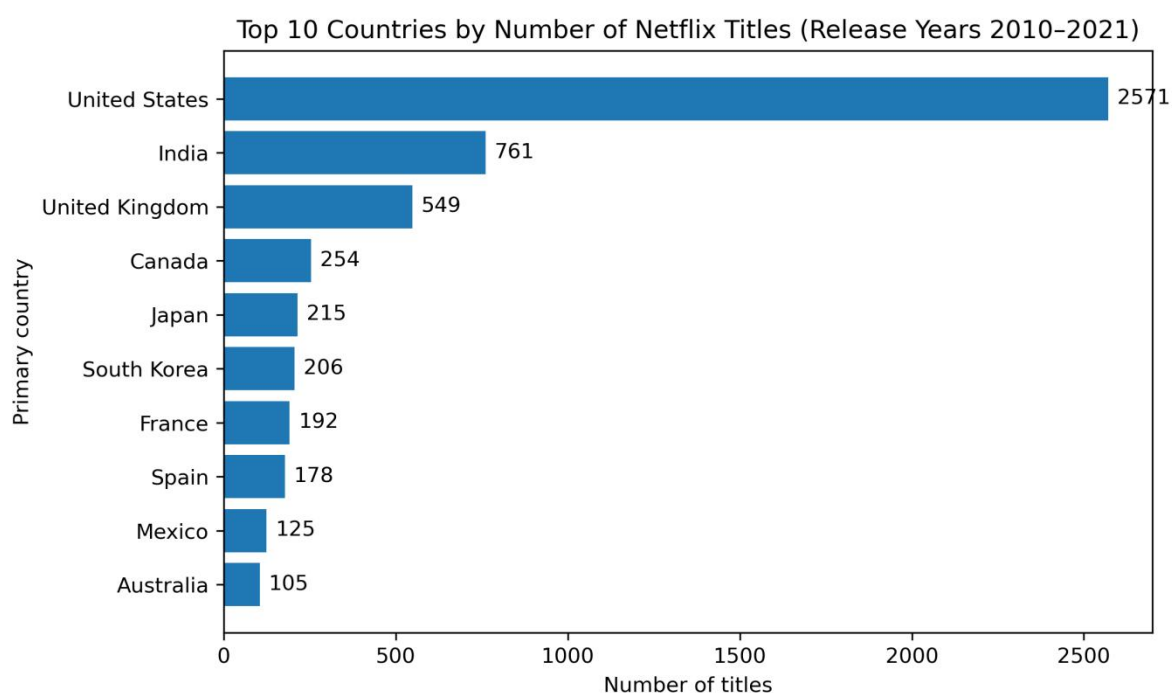


Figure 1: Top 10 countries by number of titles

Figure 1 illustrates the top ten countries by number of Netflix titles. The United States accounts for the largest share of content, with a total number of titles that exceeds that of the second-ranked country, India, by more than three times. This highlights the continued dominance of US-produced content within Netflix's catalogue.

However, several non-US countries also contribute substantially to overall output. The presence of countries such as India and the United Kingdom, among the top-ranked producers indicates that Netflix's content portfolio extends beyond a single domestic market. The top three producing countries collectively account for approximately 75% of titles in top 10, 55% of total titles overall, highlighting a relatively high level of geographic concentration. Nevertheless, the distribution remains uneven. A small group of countries accounts for a disproportionately large share of total titles, while others, including Spain, Mexico, and France contribute comparatively smaller volumes.

Overall, although international participation is evident, US content continues to dominate the distribution of titles across the observed period.

Trends in US and Non-US Content Over Time

Has dominance changed?

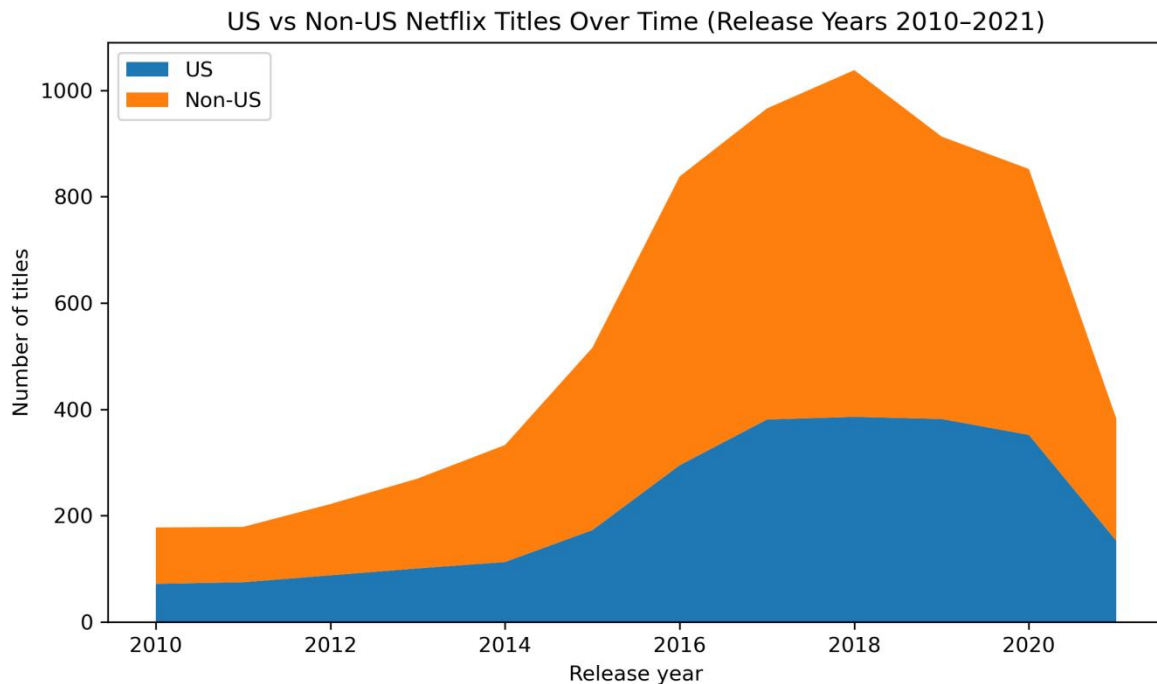


Figure 2: US vs Non-US Title Over Time

Figure 2 illustrates the distribution of United States (US) and non-US titles between 2010 and 2021. The overall pattern indicates a structural shift toward greater international diversification within Netflix's catalogue. Both US and non-US productions increase steadily from 2010 to approximately 2018, with particularly rapid growth between 2014 and 2018. During this period, total annual output expands significantly, reaching a peak of over 1,000 titles in 2018.

After 2018, both categories experience a decline in the number of releases. The most pronounced decrease occurs between 2020 and 2021. While this period coincides with the global COVID-19 pandemic, the dataset does not allow for direct causal conclusions, and the decline may reflect broader production or distribution factors.

The largest difference in absolute output between US and non-US titles also appears around 2018, when non-US productions exceed US output by approximately 200 titles. Despite continued US contributions, the growing share of non-US content suggests a gradual reduction in geographic concentration over time.

Regional Composition of Movies and Television Series

How do regions differ?

Figure 3 compares the proportion of movies and television series across the five most represented regions to highlight structural differences in content composition.

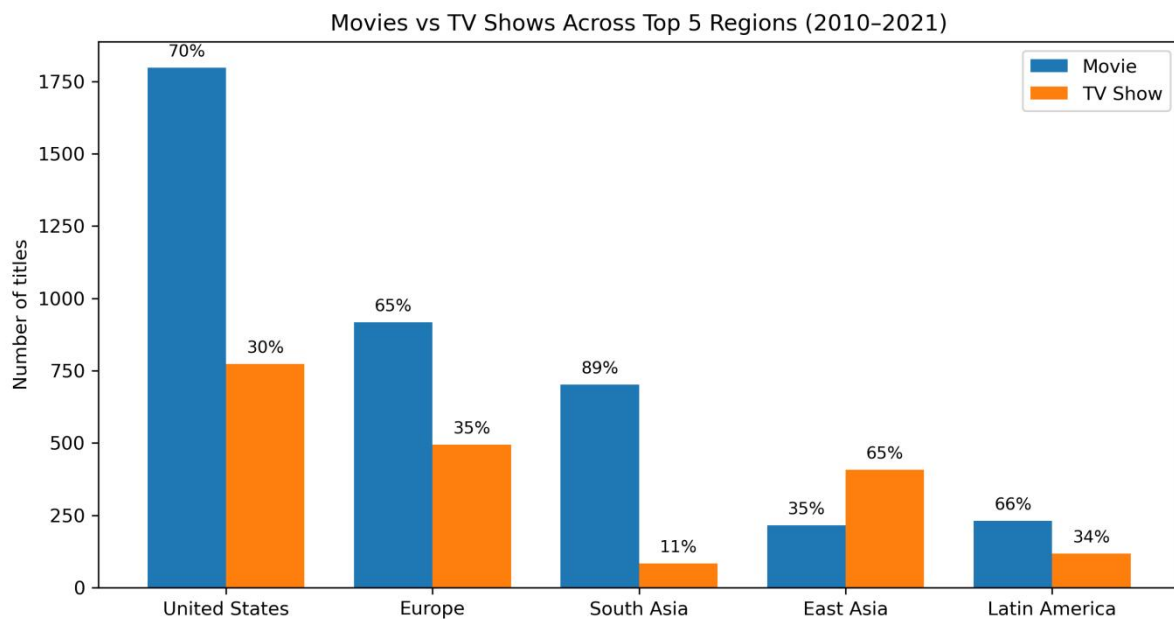


Figure 3: Top 5 regions, Movie vs TV shows

Figure 3 reveals clear regional differences in content composition. In most regions, movies account for a substantial share of total titles. However, East Asia stands out, with television series representing a relatively larger proportion compared to movies. As shown in Figure 1, East Asia is primarily represented by Japan and South Korea, both of which are known for strong series-based production. This pattern may indicate that Netflix relies more heavily on serialised content in certain international markets.

In contrast, South Asia presents the opposite pattern, with movies accounting for nearly 90% of total titles. The United States also shows a strong emphasis on movies, with approximately 70% of titles classified as films. These results suggest that content composition varies significantly across regions, potentially reflecting differences in local production traditions and audience preferences.

Key regional strategic patterns include:

- The United States remains movie-dominated.
- East Asia demonstrates a stronger emphasis on television series.
- Overall, non-US regions exhibit a greater relative importance of television series compared to the US market.

Conclusion

The findings indicate that although the United States continues to account for the largest share of content, the proportion of non-US titles has grown steadily over time.

The country-level analysis shows that content remains concentrated in a small number of leading countries, while international participation has expanded significantly throughout the period. The comparison between US and non-US output further highlights a gradual shift toward greater geographic diversification.

Overall, these findings suggest that Netflix's global expansion is supported not only by increasing geographic reach, but also by adapting content formats to different regional contexts.