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“We Don’t Aspire to Be Netflix”: Understanding Content Acquisition Practices Among Niche Streaming Services

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Abstract

Using the media industry studies approach, this article examines the acquisition strategies and licensing practices employed by three recently launched niche Jewish/Israeli subscription video on-demand (SVOD) services. Drawing on qualitative interviews with executives and publicly available materials, this analysis argues that these services acquire film and television titles through a combination of traditional and innovative licensing arrangements intended to maximize access to Jewish-themed or Israeli-produced content unwanted by better funded platforms. The findings reveal the ways in which access to specific kinds of content is dependent on executives’ ability to leverage preexisting industry-specific professional relationships as they attempt to maximize the value created from limited economic resources. As such, this article offers insights by contextualizing licensing practices being employed by niche SVODs across film and television industries while also highlighting the limitations of using the mainstream/niche binary to understand streaming distribution.

Keywords

platforms, streaming, television, media industries, video on-demand, distribution

Introduction

Increasing competition within the global subscription video on-demand (SVOD) market continues to attract a significant amount of scholarly attention as relatively new

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entrants like Disney+ and HBO Max join established players including Netflix and Amazon. Media industry studies scholars have been particularly interested in addressing the distribution practices of such highly visible services (Elkins 2019; Jenner 2018; Lobato 2019). Yet, the anti-transparency policies of the most popular streaming platforms (Wayne 2022) and scholars' lack of access to decision makers (Sundet 2021a) limits the types of research being conducted on distribution practices to those that can be addressed through press coverage, executive interviews in the public record, and marketing materials (Perren 2013). In spite of these challenges, a growing body of media industry studies literature is emerging that uses qualitative interviews and participant observation to address the distribution practices of smaller streaming platforms in national and transnational contexts (Simon 2021; Sundet 2021b). Such work offers important and much needed perspectives given the degree to which the most powerful global platforms tend to dominate industry and academic thinking about the streaming television ecosystem.

To continue developing a conceptual understanding of streaming distribution among smaller streaming platforms, this article examines the content acquisition practices of three recently launched niche SVOD services: ChaiFlicks, Izzy, and Jewzy. Drawing from qualitative interviews with executives, this study illustrates how the industrial practices of these niche Jewish/Israeli SVODs are shaped by a variety of more powerful actors in Hollywood, independent film, and Israeli television. Specifically, this analysis argues that these services acquire film and television titles through a combination of traditional and innovative licensing arrangements intended to maximize access to Jewish-themed/Israeli-produced content unwanted by better funded platforms. This article begins by offering some background on ChaiFlicks, Izzy, and Jewzy before situating this research within relevant literature addressing diasporic media and the distribution practices of niche streaming platforms. The following section provides a description of the media industry studies methods used in this research. Next, the findings are presented in three parts analyzing these niche Jewish/Israeli services' content acquisition strategies, how they license film content from a variety of sources, and their television licensing practices in the context of the Israeli television industry. This article concludes with a consideration of the implications of these findings for future research.

Ultimately, this research contributes to media industry studies scholarship on streaming distribution by offering a helicopter level view of acquisition strategies and licensing practices as they vary among three niche Jewish/Israeli SVOD services. This study also offers insights by contextualizing the variety of streaming licensing practices being employed by niche SVODs as they differ between film and television industries. The findings reveal the ways in which access to specific kinds of content is dependent on executives' ability to leverage preexisting industry-specific professional relationships as they attempt to maximize the value created from very limited economic resources. As such, this research situates niche SVOD content acquisition within broader transitions from old media to new media and highlights the limitations of using the mainstream/niche binary to understand distribution in the contemporary streaming market.

Literature Review

Since Netflix began offering streaming video to subscribers in 2007, the SVOD market has become increasingly diverse. Globally, consumers have access to a growing number of US-based mainstream services that offer libraries of valuable IP and spend billions annually to produce original content (Vlassis 2021). Streaming services backed by legacy pay-television providers compete to provide national audiences with local and international content (Raats and Evens 2021). Public service broadcasters have introduced streaming platforms as part of broader efforts to connect with younger audiences and fulfill the longstanding obligations of public service media (Donders 2019). In addition, the growth of niche platforms has substantially expanded the number of services in some markets. As Lotz and Lobato (2019) observe, however, the common “streaming war” framing of this increasingly competitive landscape obscures the more complex reality that streaming services are pursuing different audiences with distinctive content libraries at varying price points. Furthermore, there is little indication that competition within the SVOD market is a zero-sum game with market research finding that the average US household subscribes to four streaming services and the average European household subscribes to two (Balderston 2021).

In this broader context, three Jewish/Israeli streaming platforms enter the market between May and December of 2020: ChaiFlicks, Izzy, and Jewzy. The clustered timing of these launches coincides with the increased consumption of streaming media related to the Covid-19 pandemic (Rizzo and Fitzgerald 2020). Izzy’s launch was initially scheduled for September but was then moved up to May. For ChaiFlicks, which specializes in independent films, the closure of movie theaters accelerated the timetable for launch. As one of the platform’s founders explained, “We knew people are at home with nothing else to do. They can’t go to the office and work. We should start this now” (Weiss 2020). Rather than independently developing and thereby owning the technology that supports the platform, ChaiFlicks, Izzy, and Jewzy use Vimeo which offers content hosting and the ability to create a customizable user interface. In addition, all three of these Jewish/Israeli niche SVODs are available as apps through marketplaces like Google Play and Apple’s App Store as well as on devices like Roku.

Priced at \$5.99 per month, ChaiFlicks, Izzy, and Jewzy offer subscribers access to relatively limited libraries of Jewish and Israeli themed films and series ranging between eighty and 150 titles. This content is acquired through a combination of exclusive and non-exclusive licensing. Although these services all have exclusive offerings, the balance of exclusive and non-exclusive content varies substantially. At the time of its launch, all eighty of the films in the ChaiFlicks library were available exclusively through the service (Hayes 2020). In contrast, Jewzy’s initial library included a very small number of exclusive titles including an English-language stand-up show featuring an Israeli comedian and a talk show (Peled 2020).

ChaiFlicks, Izzy, and Jewzy are located and operate in a variety of geographic territories. Izzy, the most geographically expansive of the services addressed in this research, is available everywhere except for Israel. Despite being based in Tel Aviv, according to Izzy’s founder Josh Hoffman, “We aren’t interested in the local [Israeli]

market because there are enough players here, and our approach is not to compete with them but to work together with them” (Anderman 2020). At the time of its launch, Los Angeles-based ChaiFlicks was only available in North America. Nine months later, the platform entered the Australian and New Zealand markets following a deal with local film distributors (Goldsmith 2021). Jewzy, which is based in London but has core team members on both American coasts, is only available for US subscribers although the service has long-term plans that include entering other markets (Smason 2021).

In light of their explicit self-identification as providers of Israeli/Jewish content, it is appropriate to conceptualize ChaiFlicks, Izzy, and Jewzy as diasporic media platforms. Like the short-lived satellite channel MTV Desi (Mallapragada 2012) or Indian and South Asian over-the-top (OTT) television boxes (Lobato and Sarkar 2019), the targeted audiences for these streaming services are primarily ethnically defined. Furthermore, significant portions of the subscriber bases for these services are diasporic members of an ethnic group who use these services to watch content from Israel or other places identified as being associated with the Jewish diaspora. Like other forms of diasporic media, transnational Jewish/Israeli streaming platforms “do not merely enable their users to ‘be in two places at once’” but also create “the opportunity of producing new spaces where multiple remote localities and the experiences shared by their inhabitants come together, synchronize and relate to each other” (Tsagarousianou and Retis 2019, 5). Yet, scholars observe that media consumption is “a contested space that reflects the internal divides of diasporic groups” (Georgiou 2013, 90) and that the dynamics of diasporic media provide opportunities to “articulate insider ethno-specific identities” (Cunningham 2001, 135).

As such, this analysis considers the diasporic status of ChaiFlicks, Izzy, and Jewzy to be central to the creation and maintenance of specific brand identities that reflect internal differences among communities in the Jewish diaspora. As its name suggests, Izzy identifies itself with Israeli-themed and Israeli-produced film and television content. Not surprisingly, the service’s brand identity attempts to build on the recent success of Israeli-produced series distributed by major global platforms like Netflix’s *Fauda* (2015–) or HBO Max’s *Valley of Tears* (2020). According to Hoffman, “People tell us they’ve watched Israeli content on Netflix, and they want more. [Izzy is] like the main course for those who have had the appetizers” (Klein Leichman 2020). Jewzy’s brand is articulated through invocations of diasporic Jewish-American cultural/religious identity. According to founder Jeremy Wootliff, the target audience is conceptualized as the segment of American Jewish population who participate in the social and religious activities of community centers and synagogues. The service presents its content library as “chicken soup for the eyes” (Liphshiz 2020) with a heavy emphasis on comedic offerings as indicated by the tagline “from oy to joy” (Peled 2020). Jewzy’s curatorial strategy, as Wootliff notes, focuses on finding “hidden gems . . . the wonderful movies and TV programs that have been forgotten over time” (Rocker 2020). ChaiFlicks’ brand identity is a reflection of the service’s relationship with Menemsha Films, one of the most significant global distributors of Jewish/Israeli independent film and a powerful player in the Jewish film festival circuit. Neil Friedman, who co-founded Menemsha in 1998, explains, “Our audience prefers to

view Jewish and Israeli programming as a priority over other programming. [Menemsha Films] have always prided ourselves on our curatorial abilities. We like what we like, and audiences, critics and subscribers have followed” (Schwartzberg 2020). Many of ChaiFlicks’ initial offerings are films concerned with issues related to Jewish history and diasporic identity.

To understand the content acquisition strategies and practices of ChaiFlicks, Izzy, and Jewzy in the broader context of the streaming industry, scholarship addressing niche SVOD platforms is a useful starting point. In the broadest sense, niche platforms differ from mainstream platforms like Netflix and Amazon in their efforts to curate content libraries intended to appeal to specific taste cultures or narrowly defined demographic groups. Examples of niche platforms include Mubi, Shudder, and Crunchyroll which focus on art film, horror content, and anime, respectively. Although scholars observe that the specific content acquisition practices employed by these services can vary significantly, a defining feature of niche platforms is the significant degree to which their industrial practices are shaped by limited economic resources and the industrial practices of more powerful industry players. In her analysis of Mubi, Hessler (2018) observes the fraught space in which film-based “boutique streamers” operate as a result of the difficulties associated with acquiring content streaming licenses. Regarding the shuttered specialty cinema service FilmStruck, Major (2022) argues that the platform’s failure highlights “the precarious status of US-based niche streaming models in light of ongoing industrial consolidation” (p. 61). Even highly successful niche platforms are constrained by more powerful industry actors. As Wong (2020) argues in his analysis of Crunchyroll, strict content policies of conglomerates have both direct and indirect effects on the circulation of content on the platform. Since niche platforms must necessarily operate in “the shadows of powerful market leaders” (Smits and Nikdel 2019, 34), this analysis is guided by the following research question: How are the content acquisition strategies and practices of niche Jewish/Israeli SVODs shaped by the larger industrial contexts in which they are situated?

Methods

To answer this question, this study employs the media industry studies perspective which focuses on “*how individuals, institutions, and industries produce and circulate cultural forms in historically and geographically contextualized ways*” (Herbert et al. 2020, 7; italics in original). In this framework, the fact that ChaiFlicks, Izzy, and Jewzy are not producers, but rather distributors of licensed content is significant. As Herbert et al. (2020) observe, the day-to-day tasks associated with media distribution are less likely to be physically concentrated than sites of media production. In this sense, this article is a study in SVOD “circulation culture” (Herbert et al. 2020, 62) that, like Havens (2006) work on television trade fairs, is particularly concerned with the relationships between niche streaming platforms and those controlling the rights to licensed content. The data collected for this research includes press coverage, marketing materials, promotional videos, and interviews with executives. As Van Keulen et al. (2020) note, in the context of media industry studies research, the triangulation

of data sources creates opportunities to situate industry executives' "promotional and performative expressions" in relation to other data sources and broader industrial contexts (p. 754).

The material presented in the following three sections is primarily drawn from open-ended qualitative interviews with five niche SVOD executives conducted in the spring of 2021. All of those interviewed are either founders or very early employees of Izzy, Jewzy, and ChaiFlicks. Like many start-ups, these organizations have small core teams and individual employees tend to perform a variety of roles. The executives in this sample (four men and one woman) hold a variety of titles including CEO, co-CEO, and founder. It is important to note, however, that none of those interviewed had any prior streaming industry experience. In addition, these participants' previous work experience with traditional film and television industries varies substantially. For example, Izzy's co-CEO Nati Dinnar and ChaiFlicks' third co-founder Heidi Bogin Oshin have well-established professional reputations in Israeli commercial television and Jewish/Israeli independent film, respectively. In contrast, Josh Hoffman, Izzy's founder and other co-CEO, never worked in the traditional media industries before starting the platform. Given the geographic diversity of these platforms as well as the ongoing consequences of the Covid-19 pandemic, all interviews were conducted digitally. Interviews lasted between thirty and sixty minutes and were then transcribed. Some of the executives in the sample were interviewed multiple times and others responded to follow-up questions via email. In the next section, interview data from executives is used to provide an overview of the content acquisition strategies employed by ChaiFlicks, Izzy, and Jewzy. The following two sections detail the industrial practices these streaming executives use to license film and television content, respectively.

Content is King

For streaming services of any size, the ability to distribute a sufficient volume of attractive content at a competitive price is critical to establish value for potential subscribers and differentiate themselves from the competition (Raats and Evens 2021, 52). In the case of Netflix, the critical success of *House of Cards* (2013–2018) confirmed the company's strategic shift from content acquisition based on licensing to content acquisition based on commissioning original content (Wayne 2018). For Mubi, the decision to limit the size of its library to thirty films at a given time emerged as a strategic response to the financial burden of maintaining a larger selection of content for subscribers (Smits and Nikdel 2019, 26). As new entrants to the SVOD market, ChaiFlicks, Izzy, and Jewzy have not yet changed content acquisition strategies since their respective launches. As detailed below, the strategies employed by these niche-services are shaped by competing pressures including economic resources, essentialized conceptions of target demographics, and desired brand identities.

ChaiFlicks' content acquisition strategy reflects the service's relationship with Menemsha Films. As noted above, Menemsha is a significant player in the global Jewish and Israeli film festival circuit (Sienkiewicz and McIntosh 2014). Nearly every

film in the ChaiFlicks' library boasts some level of film festival success, with numerous titles having been selected for taste-making Jewish film festivals such as the San Francisco Jewish Film Festival, Boston Jewish Film Festival, and Toronto Jewish Film Festival. According to Bill Weiner, ChaiFlicks' only co-founder not directly involved with Menemsha, the service has "the best programming in the world because I have the two best curators of Jewish and Israeli programming in the world. And that's Neil [Friedman] and Heidi [Bogin Oshin]." Friedman and Bogin Oshin are, he continues, "the premier curators of this programming. Their taste is unsurpassed by anybody. And, having worked 20 years at Menemsha, they know where the best films are, what the best films are." As Weiner implies here, the most significant parallel between ChaiFlicks' and Menemsha's acquisition strategies hinges on the notion of quality. Yet, as a streaming service, there is tension between the desire for subscriber growth and the sense of quality dominant in contexts like the Jewish film festival circuit. According to Bogin Oshin, "I mean the name of the game is streaming and getting subscribers, so we've got to respond to what our subscribers want. But our first notion is quality. So we do try to curate and then go from there." As this comment implies, ChaiFlicks' library increasingly features television drama, comedy shorts, and other types of content. Nonetheless, the service continues to primarily focus on providing a blend of Israeli and diasporic Jewish film content in a way that largely recreates the norms of the robust Jewish film festival circuit in which Menemsha has found previous success.

In contrast to ChaiFlicks who licenses Jewish/Israeli-themed content from anywhere in the world, Izzy only acquires content produced in Israel that was originally intended for Israeli audiences. Given this limitation, the service organizes and markets itself less around notions of quality or artistic curation than through a cultivated association with broader trends in Israeli nation-branding. Hoffman explains, "All the content that's on Izzy today is licensed content that was made for a local Israeli audience and then either was distributed abroad or we are, in some cases, first international distributor of this content." The service, however, is not interested in content that is thematically similar to the most popular Israeli content distributed by global SVODs like *Fauda* or *Shtisel* (2013–2021) which address the Israeli-Palestinian conflict and ultra-religious Jewish observance, respectively. Hoffman asserts, "We don't aspire to be Netflix." Instead, he explains, Izzy's goal is to acquire "content that doesn't just show more of the same no matter how good the scripts are . . . because there's so many tremendous [Israeli] stories that don't have to do with extreme religion or violence or war." Indeed, the content in Izzy's library is intended to appeal to subscribers and potential subscribers wishing to engage with representations of Israel that minimize conflict, de-emphasize religion, and largely ignore Palestinian experiences. In addition to geographic and thematic concerns, Izzy's content strategy is also based on the acquisition of films and series without international distribution deals in place. Dinnar, who handles Izzy's acquisitions, notes that the government's increasing support for local film and television production in the last ten years has led to a situation where "great content" has "just stayed on the shelf, you know, here in the producers' office getting dusted." He continues, "And I thought that, you know, that's the content, the

first content we should try to reach out to: the ones that didn't get picked up. And that's what we did."

Like Izzy, Jewzy's acquisition strategy is oriented to licensing content that is not being distributed by any traditional or streaming platform. In particular, this service is interested in English-language films that are both affordable and have mainstream appeal (within the context of niche Jewish American audiences). Describing the type of content he is looking for, Wootliff says, "It has to work for a mass audience. Something for everyone." He continues, "So if they are well-reviewed, clearly good movies, won awards and they have to be affordable then we look at the movie and decide whether or not it's worth it." The site's marketing slogan "Love America. Love Jewish. Love Israel." combined with the service's clear invocation of Netflix's red and black iconography in its visual design, position Jewzy as a natural choice for subscribers rooted in mainstream American life. Yet, the content in Jewzy's library is not intended to be appreciated by every subscriber. To stress this point, Wootliff notes, "We've got a couple of [romantic comedies] up there that are not the greatest films. But, tell the audience they're not the best. That's ok. Some people like that. So we give people what they want." With a selection of mainstream content that offers something for everyone, Jewzy's acquisition strategy is intended to appeal to subscribers with tastes similar to those of "the traditional broadcast [television] viewer." But Jewzy has thus far been unwilling to license television series. According to Wootliff, "We don't have TV series yet because they are very expensive because you pay per episode." Given the higher costs relative to individual films, the risks involved with a series failing to appeal to existing subscribers or failing to draw new subscribers is thought to be too great. Licensed television series, however, are included in Jewzy's long-term plans. As Wootliff explains, the service will need television series as part of its broader organizational goal to become "a one stop shop for all your Jewish entertainment needs."

Licensing Jewish and Israeli Film

The film licensing practices employed by Jewish/Israeli niche streaming platforms vary with the availability of economic resources, the type of content being licensed, and the identity of the rights holder. A significant portion of the films available on ChaiFlicks are a product of the service's relationship with Menemsha Films. It is necessary to note, however, that ChaiFlicks exists as a streaming outlet for films distributed by Menemsha as a result of Netflix's shifting content acquisition strategies. As Bogin Oshin recalls:

Four years ago, [Menemsha] had a film that did over a million dollars box office, which we were able to sell to Netflix. It was an English comedy about a Jewish baker in the East End called *Dough* (2015)]. And we sold that to Netflix for quite a bit of money. The following year, we had another film that did over a million dollars in the box office, it was an Israeli film called *The Women's Balcony* [(2016)], which we were able to sell to Netflix for half the amount of money. The third year in a row we had another film [*1945* (2017)]

that did over a million dollars, it was a Hungarian black and white period piece, perhaps the best of the bunch, and Netflix was no longer buying our kind of independent, arthouse films. Their model changed.

During this period, Netflix's declining level of interest in films distributed by Menemsha was indeed indicative of the streamer's new strategic approach to independent films more generally. Between 2010 and 2014, as Smits (2019) observes, the company transitioned from an exhibition platform to an integrated studio with production and distribution departments supporting investments in their own content (p. 174). As a consequence, the number of "Netflix Originals," films where Netflix acquired global distribution rights as a financier, co-producer or distributor, increased from just two in 2015 to twenty-five in 2017 (Smits 2019, 175). By 2018, Netflix was spending eighty-five percent of its eight billion dollar annual content budget on original content (Spangler 2018).

In response to Netflix's unwillingness to acquire outside content, Menemsha's founders create ChaiFlicks as a separate entity to enter the streaming market and generate revenue from the existing catalog of films. Shortly after ChaiFlicks' launch, the service begins acquiring third party product unrelated to Menemsha's role as distributor for the Jewish/Israeli independent film circuit. To make these acquisitions, ChaiFlicks uses similar film licensing practices as those employed by other platforms specializing in independent and arthouse film. In their analysis of Mubi, for example, Smits and Nikdel (2019) observe that the service licenses content from Hollywood studio distributors, like Sony Pictures, through multi-year distribution deals that have developed over time (p. 31). When dealing with sales agents, independent distributors, or directly from producers, however, Mubi usually licenses content through revenue sharing agreements based on performance. In some instances, the service is willing to pay upfront fees for contemporary films. After initially declining to discuss specific licensing arrangements on the grounds that they are "kind of proprietary," Bogin Oshin explains that ChaiFlicks similarly licenses films using a combination of upfront fees and backend revenue sharing. Weiner offered slightly more information about the service's financial model asserting that any revenue from subscriber growth would be used to fund future acquisitions. Nonetheless, he was unwilling to explain ChaiFlicks' "great model for acquisitions" as a matter of confidentiality. In addition to individual acquisitions for independent films, which would make sense given the relationship to Menemsha Films, *Deadline* reports that ChaiFlicks also has multi-picture deals with multiple partners including Israeli global distributor Go2Films (Hayes 2020).

Unlike niche services whose film licensing deals include backend revenue sharing, Jewzy uses the more traditional arrangement which depends on upfront fees. As Wootliff explains, "We put money on the table. It's there the next day. [Film distributors] like that." By paying upfront, this niche SVOD executive believes Jewzy is investing in long-term industry relationships and creating a competitive edge over its competitors. He says, "I know that some of the competitors are talking to the distributors saying, 'You know, [money] down the road, rev[enue] share, we'll give you something if there is anything.' [Distributors] don't want to see that." Of course, the degree

to which Jewzy's use of upfront licensing is a strategic choice remains unclear. Wootliff, who spent the majority of his career working as an independent filmmaker and television producer, does not handle acquisitions directly. Instead, he explains, the service's content acquisition is handled by "[Our] guy in [Los Angeles], it's his thing. Executive in the movie acquisitions and licensing world. Integral to opening doors. Amazing deals coming up. done a lot of legwork: been to the film festivals, met people for years." Although Wootliff would not identify this person by name, Jewzy's website identifies a longtime television industry executive as the individual responsible for licensing and acquisitions. Given this extensive television industry experience, it seems unlikely that Jewzy has the type of direct connections to film distributors and producers that ChaiFlicks can leverage as a result of its relationship with Menemsha. Consequently, "money on the table" might be Jewzy's only means of securing licensing for on-brand "hidden gems" like *Oy Vey! My Son Is Gay!!* (2009).

In contrast to executives at ChaiFlicks and Jewzy who discuss their acquisition practices in general terms, Izzy's decision makers freely describe the platform's financial arrangements with Israeli film producers and distributors. These arrangements primarily rely on performance-based revenue sharing. According to Hoffman, Izzy reserves twenty percent of its total subscription revenues for revenue sharing which gives him the ability to tell distributors and producers, "If the content is good, you should get a nice chunk of that for at least the first few months." In practice, rights holders earn between \$0.10 and \$0.25 for each unique title streamed, depending on the number of plays (Shem-Tov 2020). Although Izzy does not offer any guaranteed income, the platform's rights are not exclusive. In addition, rights holders can have their titles taken down with thirty-day notice. For distributors and producers expecting the traditional minimum guarantees associated with licensing deals, the terms of Izzy's offers are not always appealing. Part of the problem, according to Hoffman, is that Israeli filmmakers typically give their rights to national distributors who then look for buyers. He says, "One of the things we have to do a better job of locally in Israel is educating the rights holders that putting your content in the hands of national distributors is in most cases kind of a dead-end." To be a viable alternative, Hoffman claims, Izzy needs to "successfully show creators and producers locally that they shouldn't just merge their content off to distributors, that there's a different way of doing things, they'll actually benefit in the long run because they won't have to share the pie." Yet, initially, the platform had a difficult time acquiring content through revenue sharing deals.

As a mechanism to overcome the reluctance of film rights holders, Izzy offers small upfront payments. According to Dinnar, the amount of a given "signing bonus" is determined by three factors: the age of the film, quality as reflected by award nominations, and marketing potential. Each film is evaluated according to these factors on a scale of one to three. Films that score above seven according to this system are given a \$1,500 upfront licensing fee. In the context of the Israeli independent film industry, Dinnar explains, "a small amount [of money] goes a long way, especially for content that's already done." The signing bonus, he continues, allowed Izzy to "break through" moving from "zero content to over 200 titles." Such small upfront payments, however,

have little appeal for distributors or producers with the rights to films they believe have broad appeal. According to Dinnar, “If [Izzy] would compete for something that somebody thinks has Netflix potential, he won’t sell it to me for a thousand dollars or even \$5,000 upfront.” Despite the creativity of their licensing practices, executives at Izzy remain heavily constrained by the financial realities of being a new service in the SVOD market.

Licensing Israeli Television Series

Although content acquisition is a constant challenge for niche SVODs, licensing Israeli television series is particularly difficult for ChaiFlicks and Izzy for several reasons related to the industrial norms of television licensing, the peculiarities of Israel’s television market, and the strong reputation of Israeli television in the global market. In contrast with film licensing, the costs associated with licensing television series are almost exclusively based on upfront fees. In her analysis of digital distribution windows, Doyle (2016) notes that SVODs typically license content like a high-end drama series from the rights holder for a specific period of time at a specific price. The performance of that series for the SVOD is immaterial to the financial terms of the license. As a result, the high upfront fees associated with the most desirable television series would be a significant burden for a streaming service still establishing its subscriber base.

ChaiFlicks and Izzy’s difficulty in acquiring Israeli television series is also related to the internal dynamics of the national market which is both heavily regulated and increasingly competitive. As a result of regulation, the country’s two legacy pay-television providers, HOT and YES, are required to spend eight percent of their gross annual revenue producing local Hebrew-language television content (Wayne and Castro 2021, 6). Yet, the influx of low-cost OTT digital television services has reduced legacy providers’ market share in recent years (Tucker 2018). Given the continuing high levels of public obligation and reduced subscriber revenue, revenues generated from the sale of series to global platforms like Netflix and Amazon are increasingly economically critical for legacy Israeli television providers (Wayne 2020, 38–9). In this context, the inability of ChaiFlicks and Izzy to pay large upfront fees to license Israeli series is an additional challenge considering companies like HOT and YES’s need for precisely this type of revenue.

In addition, the success of Israeli series and formats with international audiences has helped establish a variety of national producers and distributors as significant players in the global market (Chalaby 2016). Consequently, Israeli television distribution executives are primarily concerned with selling new content to international buyers or acquisitions executives from large national markets. For a niche service like ChaiFlicks, the measure of clout the company has by way of Menemsha when dealing with independent film producers is largely irrelevant when trying to acquire Israeli television series. As Bogin Oshin explains, “There are big players in that world, so it’s very different. Especially with the popularity of Israeli TV series, and the quality of Israeli TV series, so it’s a very difficult niche.” Perhaps more so than quality, it is the

potential popularity of Israeli series that limits these niche services' ability to license content. According to Dinnar, it is very hard to make deals with "producers who dream about the big sell" to a global platform like Netflix. Yet, global players are not the only streaming services interested in licensing Israeli content. For example, Topic, a streaming service operating in North America with upmarket branding that specializes in exclusive international content, acquired three series from Israeli distributor Keshet International (White 2019).

Despite these challenges, Izzy and ChaiFlicks have both been able to license Israeli television series. In early-2021, ChaiFlicks began streaming the first season of *The New Black* (2017–), a comedy centered on four ultra-orthodox young men who study at a yeshiva in Jerusalem. Although the series' rights are controlled by well-known international distributor Dori Media, ChaiFlicks negotiated the acquisition through an undisclosed third party. The short-term licensing deal, which included exclusivity, expired in April 2021 and the series was taken down from the platform. As a follow up to *The New Black*, ChaiFlicks licensed the thriller *Suspect* (2015) which will remain on the service for at least two years. In contrast to these one-offs, Izzy acquired the streaming rights for five series in a deal with Armoza Formats, the Israeli producer and distributor recently bought by the UK's ITV Studios in 2019. As noted in a *Variety* write-up, the deal included a comedy series, a docu-series, and three dramas (Lang 2020). According to Dinnar, Izzy offered Armoza the same arrangement they use with independent film producers and distributors. In this instance, the signing bonus totaled less than ten thousand dollars for all five series. When asked why a company known as a global powerhouse in unscripted formats would accept such a low upfront fee for anything in their catalog, Dinnar explained that he believes the internal dynamics at Armoza worked in Izzy's favor. Speaking of his contacts at Armoza, he said, "They wanted to make the sale. They wanted to show their ITV bosses and show the producers that gave them the distribution [rights] that they can sell it."

On the basis of these successful acquisitions, executives at ChaiFlicks and Izzy have come to understand that Israeli series are very important to maintaining and expanding their subscriber bases. According to Weiner, *The New Black* was a strong performer on ChaiFlicks. He asserts, "It's just a home run. It's just so good. It's just, it's a slam dunk and everybody loved it. Everybody loved it." Discussing the popularity of Armoza's five series on Izzy which he characterizes as "a game changer for us," Dinnar offers specific numbers. In the fourth quarter of 2020, the company paid out thirty thousand dollars in revenue share. A third of that amount, ten thousand dollars, went to Armoza for the performance of its series. Dinnar says, "That's a third of the [revenue sharing] money because they had multiple episodes and it's based on viewing. So drama series would have, would always have a great impact." In fact, the popularity of Israeli drama series is so disproportionate that other content cannot compete. Prior to the licensing deal with Armoza, *Sabena Hijacking* (2015), a docu-drama film produced by Dinnar himself, was the most popular title on the platform. Although it is still the most popular in term of minutes viewed, Dinnar explains:

[I]t can't compete with a thirty-episode drama series, forty minutes each. And the thing is when somebody watches a documentary, if after five, fifteen minutes, they don't want to watch anymore. They stop. If they watch a drama and they saw the first episode, the second episode, you know, they're going to see all thirteen.

He continues, "And that's the power of the dramas here." The popularity of the series licensed from Armoza led Izzy executives to explore direct deals with Israeli television producers. In a follow-up interview, Dinnar confirms that Izzy successfully negotiated the acquisition of *Johnny and the Galilee Knights* (2015), a single-season comedy-drama series, from YES, the Israeli co-producer of Netflix's *Fauda*.

Yet, keeping popular Israeli series on the platform and acquiring new seasons presents additional difficulties. Although exclusivity is often thought to be particularly important for SVODs (Lotz 2018, 121), exclusive rights are not included in the agreement between Izzy and Armoza. As a result, Izzy is largely at the mercy of the powerful international distributor. Speaking hypothetically about a situation in which the streaming rights to a licensed series are acquired by a global SVOD, Dinnar says, "We'll probably get a call from Armoza telling us you have 30 days or 60 days to take [legal drama] *Red Lines* [(2018-)] off because it was sold to Netflix. I would probably say bummer." In addition to the reality that Izzy could lose a popular licensed series at any time, it is uncertain if the service would be able to acquire subsequent seasons of such a series. Discussing *Red Lines*' second season which was in production at the time of the interview, Dinnar asks and answers, "Does it come to Izzy? I'm not sure. Will I have to pay more for it? I'm afraid that might happen. If I don't pay for it, will my subscribers be pissed? Damn right." For this executive, the inability to acquire subsequent seasons of a popular show seems to be more worrying than losing content outright, "When that happens, when season two comes out, how do I get it to my subscribers? Big question."

Understanding the Content Acquisition Practices of Niche Streaming Platforms

Utilizing the framework of media industry studies, this study uses qualitative interview data to examine the content acquisition strategies and licensing practices of three Jewish/Israeli niche SVOD services. At the macro level, the findings identify some of the ways in which the industrial practices of ChaiFlicks, Izzy, and Jewzy are shaped by a multitude of more powerful actors. ChaiFlicks' very existence is a consequence of Netflix's decision to directly invest in independent films rather than licensing them from distributors like Menemsha. Similarly, Izzy's ability to license series from a major local producer like YES stems from shifts within the competitive landscape of Israel's pay-television market (a market where, it should be noted, Izzy doesn't operate). At the meso-level, niche Jewish/Israeli SVOD services acquire content using a combination of traditional and innovative licensing arrangements that vary with industrial context and the expectations of rights holders. For all three of the services addressed here, access to specific kinds of content is dependent on executives' ability

to leverage preexisting industry-specific professional relationships. At the micro level, ChaiFlicks, Izzy, and Jewzy offer subscribers thematically relevant content that, for whatever reason, is unwanted by better funded buyers. In this context, executives work to maximize the value created from limited economic resources by curating content libraries that align with their services' distinctive brand identities that are oriented to differentiated segments of the diasporic Jewish audience.

This research has several implications for scholars concerned with streaming distribution and the global SVOD market. First, this study illustrates the challenges associated with understanding the variety of content acquisition practices being employed by niche SVODs. Three Jewish/Israeli streaming services enter the market in the span of eight months in 2020 and all three operate within a distinctive constellation of geographic and industrial contexts. Given its interest in English language content and its exclusively American audience, Jewzy's acquisition of films is limited to those available from independent distributors in Hollywood and North America. In addition to the ten to fifteen films acquired annually by Menemsha directly from sales agents and producers across the world, ChaiFlicks also has a multi-picture deal with a prominent international distributor of Israeli films. In addition, the service has successfully licensed multiple Israeli television series without having to directly deal with the powerful local producers and high-profile international distributors that typically control access to such content. Beyond the geographically diverse sources from which niche SVODs acquire content, this research also illustrates the ways in which the meaning of licensing practices varies with industrial context. The fact that Izzy uses similar deals to acquire both film and television content is particularly significant here. For independent Israeli filmmakers and producers who typically expect deals that include a traditional guaranteed minimum, a niche SVOD's offer of a low four-figure signing bonus and revenue split based on streaming views might be disappointing. But in the world of independent film, sales deals based on a combination of upfront fees and backend performance-based revenue are common. In the context of the Israeli television industry, however, deals of this sort between subscriber-supporter streaming platforms and content rights holders are a significant departure from traditional industry practice. Such arrangements are all the more surprising given the power differentials between these niche services and Israel's largest producers and distributors.

Second, this study demonstrates the value of situating niche SVOD content acquisition within the broader transitions from old media to new media defined by ongoing negotiations between established and emerging industrial practices. On one hand, the importance of industry connections in niche Jewish/Israeli SVOD executives' descriptions of their content acquisition practices is indicative of the continuing centrality of professional relationships like those identified by Havens (2006) in the context of the global television market. On the other hand, the absence of comparative cases within the media industry studies literature highlights the limited state of knowledge regarding the relationships between niche platforms and content rights holders. Future research would do well to explore the degree to which performance-based revenue sharing is common in streaming licensing agreements for television series. Similarly, research exploring television distributors might usefully ask how such revenue sharing fits into

existing digital distribution windows. As Lotz (2021) observes regarding the industrial dynamics that animate the circulation of television content in the digital age more broadly, it seems likely many practices related to streaming television licensing in the SVOD market “remain unknown and likely are only in their earliest stages” (p. 62).

Third, this research draws attention to the limitations associated with using the mainstream/niche binary to understand the contemporary SVOD market. Although there is obvious utility in distinguishing mainstream services like Netflix from niche services that target specific audience demographics or offer subscribers content linked to particular genres, the very notion of niche SVODs belies the extreme variation within the category of platforms that could be appropriately labeled as such. Crunchyroll is most certainly a niche streaming platform specializing in anime. With more than three million subscribers, Crunchyroll is also a subsidiary of AT&T’s WarnerMedia that is in the process of being acquired by Sony subsidiary Funimation for nearly \$1.2 billion (Goldsmith 2021). At the time of its launch, one of the most important assets for ChaiFlicks was access to Menemsha’s mailing list of approximately 100,000 email addresses (Hayes 2020). On a portion of its website that has since been removed, Izzy celebrated the growth of its subscriber base to more than sixteen thousand after less than twelve months in the market. Given the differences in both scale and resources among niche services, scholars might usefully begin developing new frameworks and terminologies to reflect the diversity of the SVOD market more accurately.

Looking ahead, this study of the content acquisition practices employed by three recently launched Jewish/Israeli SVODs usefully highlights some of the challenges confronting media industry studies scholars seeking to understand the complexities of distribution within the contemporary SVOD ecosystem. If, as Hoyt (2014) observes, streaming services “are revolving collections of licensing agreements” (p. 200), then the rich qualitative data produced by access-dependent mid-level fieldwork will continue to provide the most nuanced analyses of the industrial relations that occupy, in Perren’s (2013) words, the “crucial ‘space in between’ production and consumption” (p. 166). As this analysis demonstrates, however, the ability to contextualize such nuance requires geographically diverse and multi-sited industrial knowledge. Ultimately, then, understanding SVOD distribution will require scholars to broaden their focus beyond the largest platforms and the most familiar production centers to effectively address the licensing practices that are emerging alongside the growth of niche streaming services.


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