



Beyond Borders:

The Evolution of Non-English Content in MENA

February 2024



Exploring the Global Entertainment Shift



The global entertainment landscape has experienced a remarkable shift in recent years with a surge in demand for non-English content.

In particular, the MENA landscape is experiencing a notable departure from the dominance of English-language content, with audiences expressing an increased appetite for Arabic & locally produced programming.

Rise Studios, an entertainment company driving investment into content from the Middle East region, has been quick to recognize this shift and has conducted a research report in partnership with Parrot Analytics to explore this trend.

Parrot Analytics, is a data analytics firm specializing in the entertainment industry, that aims to quantify the demand for TV shows, genres and formats.

By understanding the driving forces behind changing content demand, Rise Studios addresses evolving preferences with top-tier programming.

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EXECUTIVE INTRO



Amanda Turnbull | CEO & Co-Founder, Rise Studios

“ The MENA region’s entertainment landscape holds immense promise for growth and innovation. This report is a key step towards unlocking its full potential as it provides a deeper understanding of audience preferences. By tapping into their desires, we can develop captivating, high-quality content that meets demand while resonating with international viewers. This approach not only fosters cultural appreciation but also strengthens the region’s foothold in global markets. ”



EXECUTIVE INTRO



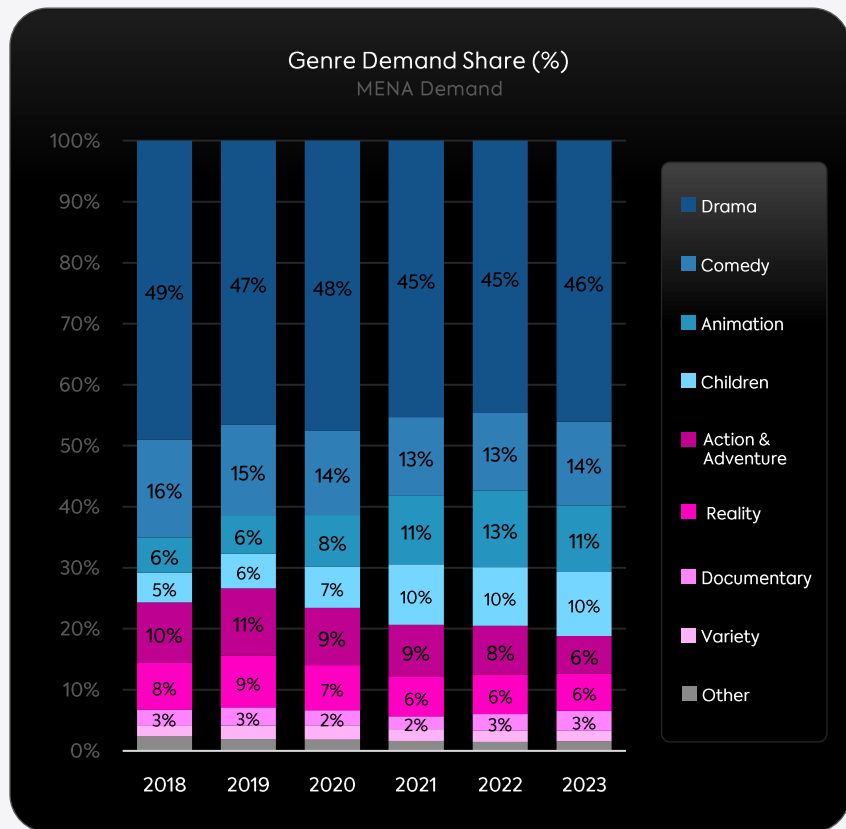
Wared Seger | CEO & Founder, Parrot Analytics

“ Working alongside Rise Studios, we’ve uncovered the vibrant dynamics of MENA’s media consumption. This partnership is more than a venture into analytics; it’s a commitment to elevating the narrative richness of the region. Together, we’re unlocking the potential of data to craft stories that not only entertain but also connect and reflect the diverse tapestry of global audiences. ”

Exploring regional demand



MENA's rich culture and traditions drive genre content



Tv content taste preferences have evolved over the last 5 years...

- ▶ **Drama's dominance:** Drama remains the top audience choice reflecting the region's rich storytelling traditions which include high-concept narratives, historical epics, and more.
- ▶ **Consistent appeal of comedy:** Comedy remains an evergreen genre exhibiting a consistent demand share over time.
- ▶ **Anime's ascent:** The surge in animation demand, from 6% in 2018 to 11% in 2023, can be attributed to the rising popularity of Anime, resonating with both younger and adult audiences in MENA.
- ▶ **Children's content growth:** Demand for children's content has more than doubled over the last five years, indicating a focus on younger viewers.
- ▶ **Action & adventure's dip:** At a higher price point, networks & streamers have turned their attention to cheaper alternatives, especially within the unscripted space.

Growing demand for non-English content

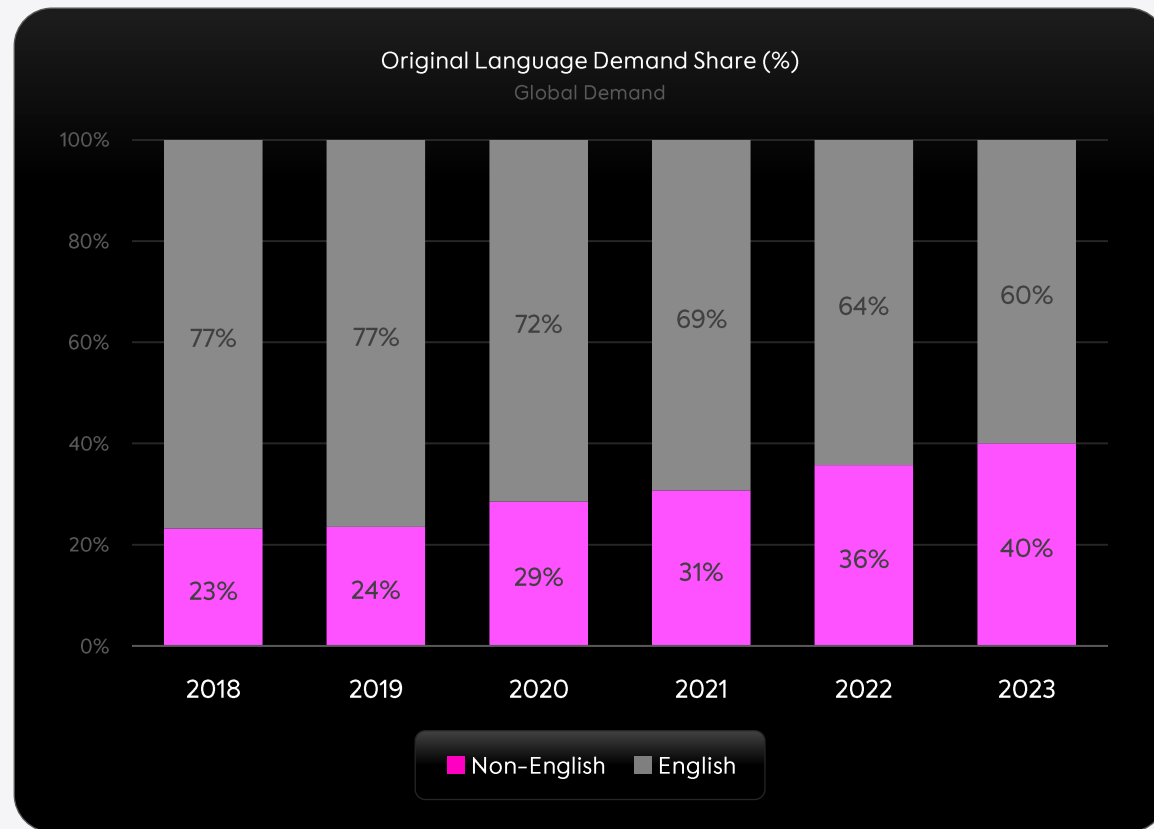


Global demand for non-English content is rising...

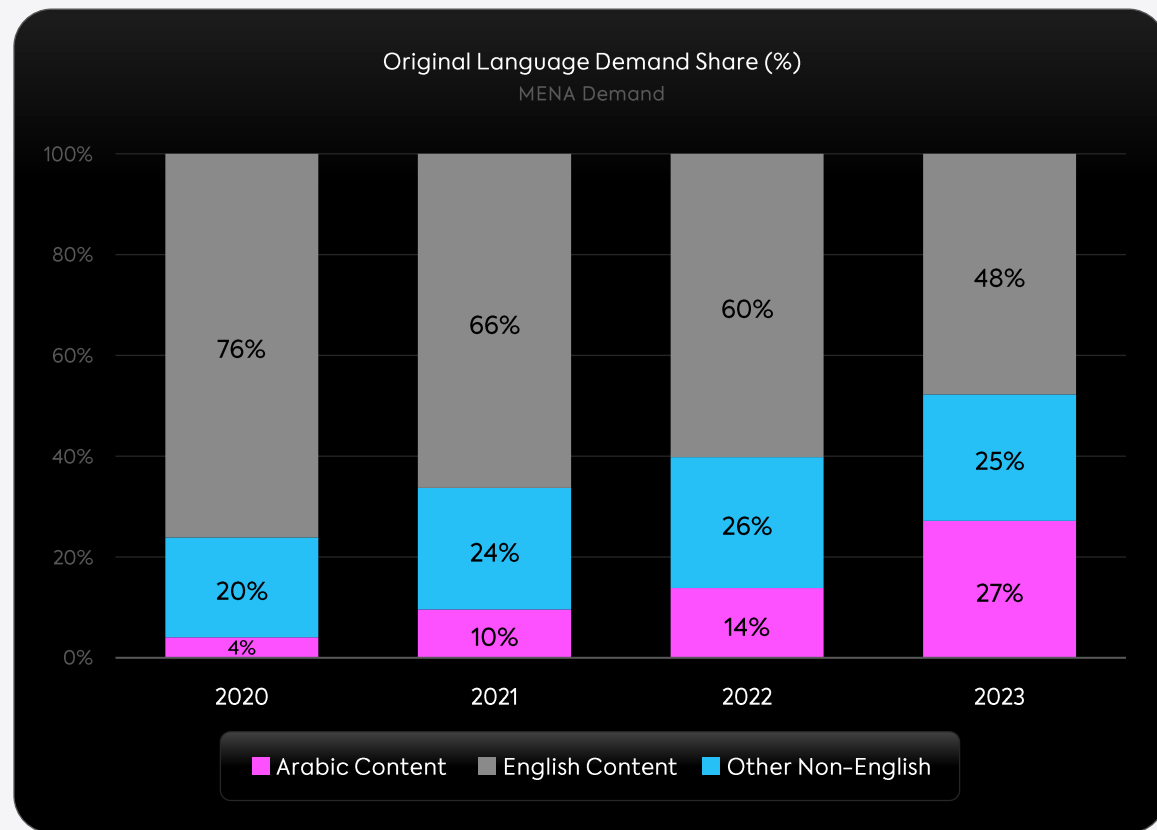
Globally, the demand for non-English content has nearly doubled *since 2018*, now at an all-time high. This is due to greater access supported by worldwide platforms and international production requirements.

Even demand for non-English content in the US has leaped more than +50% over the past three years thanks to improved dubbing, subtitling, and cultural adoption.

Technology is making the world smaller but a viewer's entertainment ecosystem larger, influencing viewer preferences.



Even more evident in the MENA Region...



Within the MENA Region, the demand for Non-English content accounts for over half of the total demand, showcasing a remarkable shift in viewer preferences.

Specifically, Arabic content now represents over a quarter of the total demand in MENA, almost doubling the demand seen in 2022.

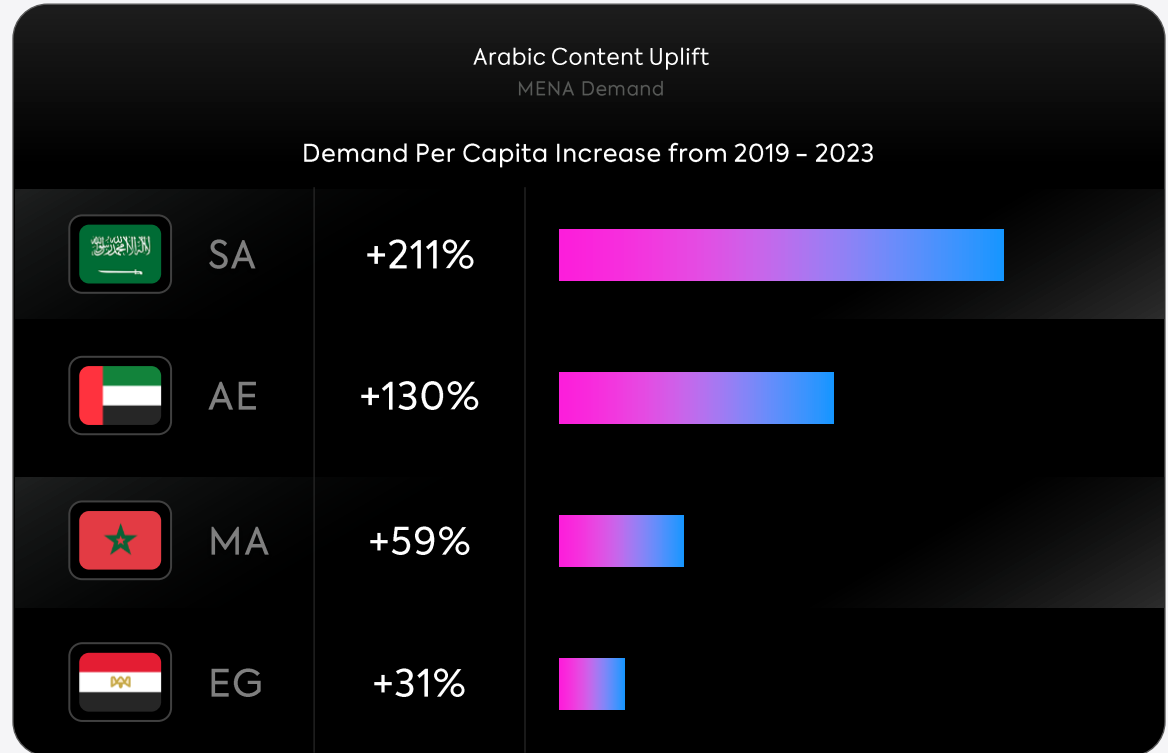
This presents a great opportunity for local stories to shine through culturally relevant narratives.

Hollywood is no longer the holy-grail of entertainment

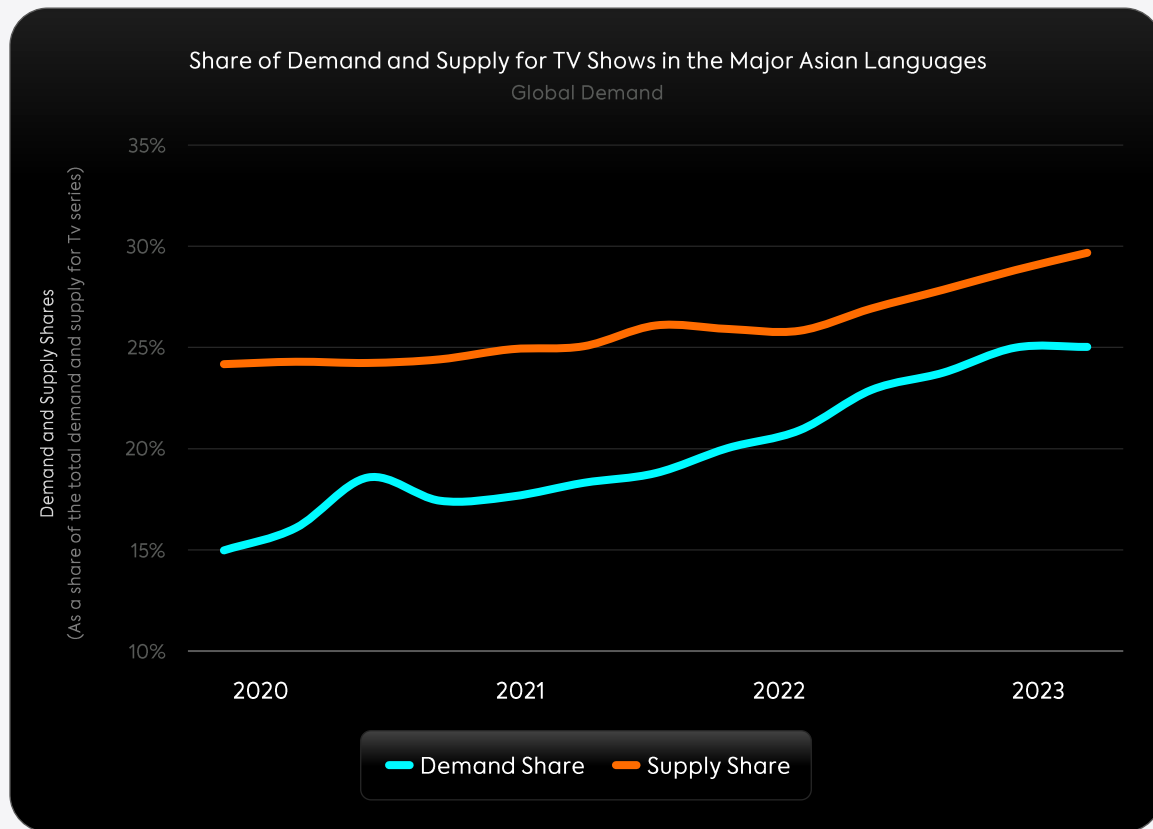
Across the region, opportunities for regional productions are increasing

Audience demand levels for local language, Arabic, and non-English content are growing as platforms and distributors increasingly program for international reach versus merely distributing big English language blockbusters.

Culturally specific content is a prime way to build market share in targeted regions.



Asian-Language TV is bridging the Global Demand-Supply Gap



The surge in demand for major Asian language titles is rapidly approaching the current supply, signaling a growing desire for such content.

Historically, South Korean series only run for one season, but rapturous demand for breakout hits such as *Squid Game*, *Big Bet* and *The Glory* are changing established norms.

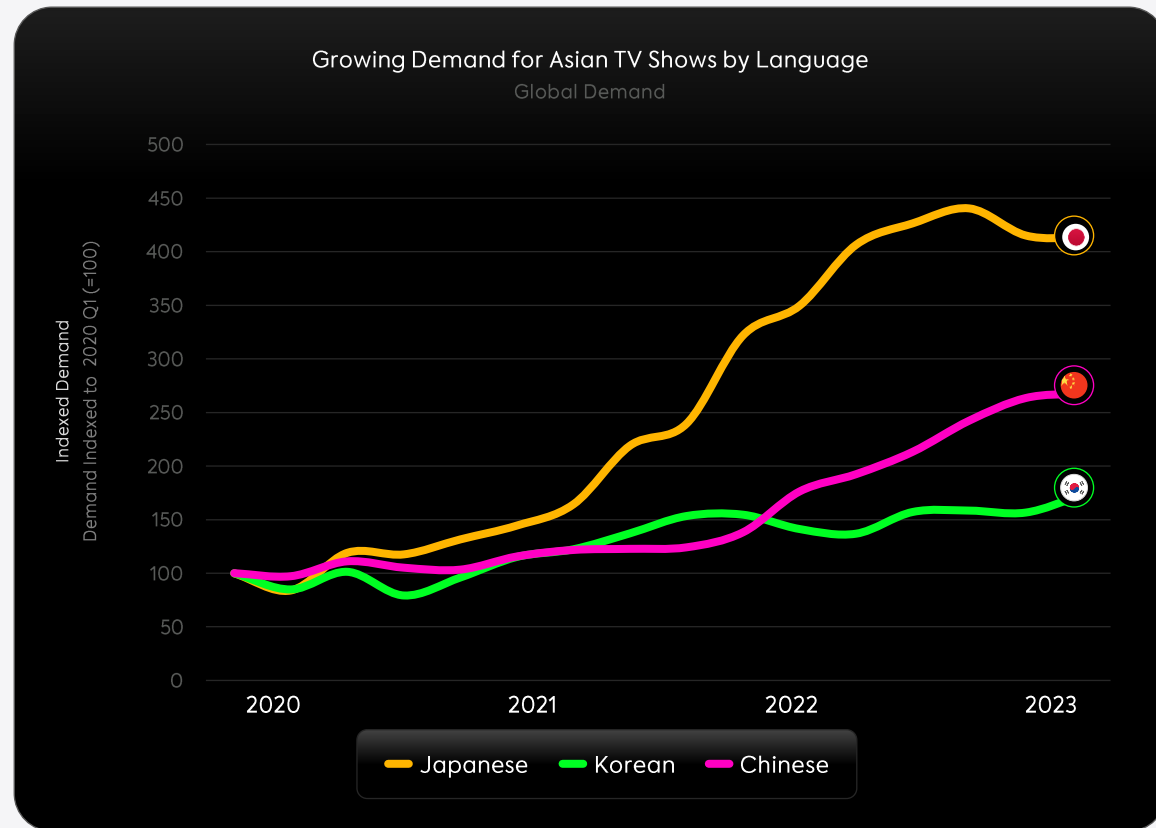
The overall increase is partly driven by Japanese animation, which was the most sought-after subgenre globally throughout 2022 and 2023.

Japanese TV content dominates, leading global demand

Good stories come from everywhere.

Japanese language series boasted the highest global audience demand share of the major Asian languages last quarter at 10% thanks to anime and live-action hits such as *Alice in Borderland*.

Japanese animation has enjoyed a meteoric rise since Q1 2020 and now ranks in the top three in demand over supply globally.



White Space Analysis & Content Travelability

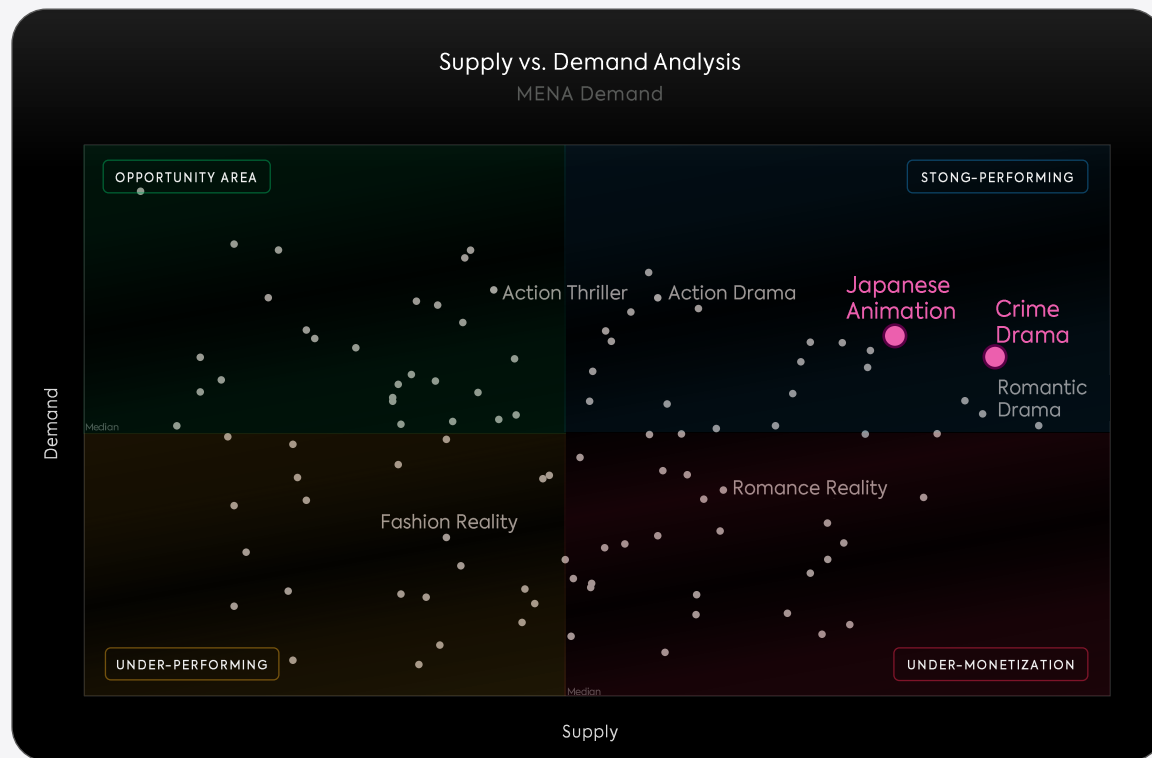


Balancing local specifics with global themes captivates diverse audiences

Applying the economic principle of supply and demand allows us to identify the themes in content that have the most potential for success.

Both Japanese Anime and Crime Drama are two of the strongest performing subgenres, outlining their potential when testing concepts for new productions.

These subgenres harness universal motifs and themes that resonate with audiences across the globe, reflecting the power of relatable narratives, while also utilizing genre storytelling elements to provide engrossing entertainment.



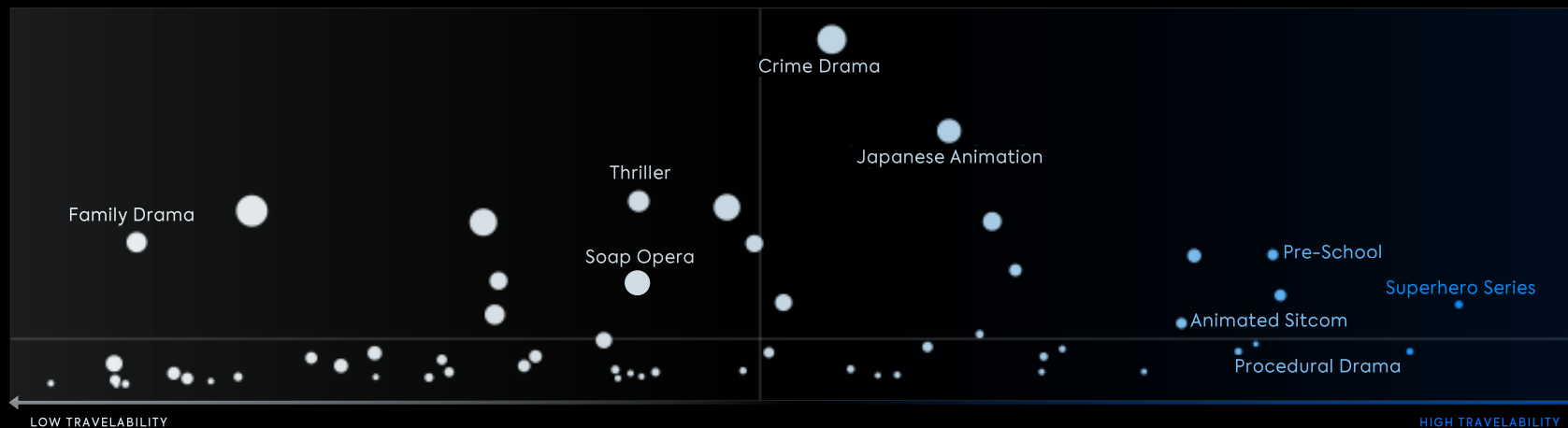
Crime Drama & Japanese Animation both travel well and transcend boundaries

Genre Travelability

Bubble size denotes regional genre demand

Genres like romantic and family drama, cooking reality & lifestyle reality, are tailored to local audiences with cultural references, humour, and themes specific to the region, making them less likely to resonate internationally. These shows often rely on language, social norms, and regional themes and as a result, their international appeal is limited

Genres that show high travelability often rely on universal themes, relatable characters, and captivating storytelling that transcend cultural boundaries, making them popular among diverse audiences. Additionally, these genres often feature elements that resonate with a global viewership, such as thrilling action, compelling narratives, and visually stunning animation.



Universal motifs and gripping tales will get them watching...

Successful non-English content integrates universal motifs, resonating with shared human experiences through unique creative visions. Compelling storytelling explores themes like love, family, and resilience - bridging cultural barriers. Whether intense family dramas or action-packed adventures, captivating narratives strike a balance between a gripping premise and authentic emotion.

Brazilian crime drama *Criminal Code*, the half-English/Japanese crime drama *Tokyo Vice*, and Colombia's romance thriller *Fake Profile* are all successful examples.

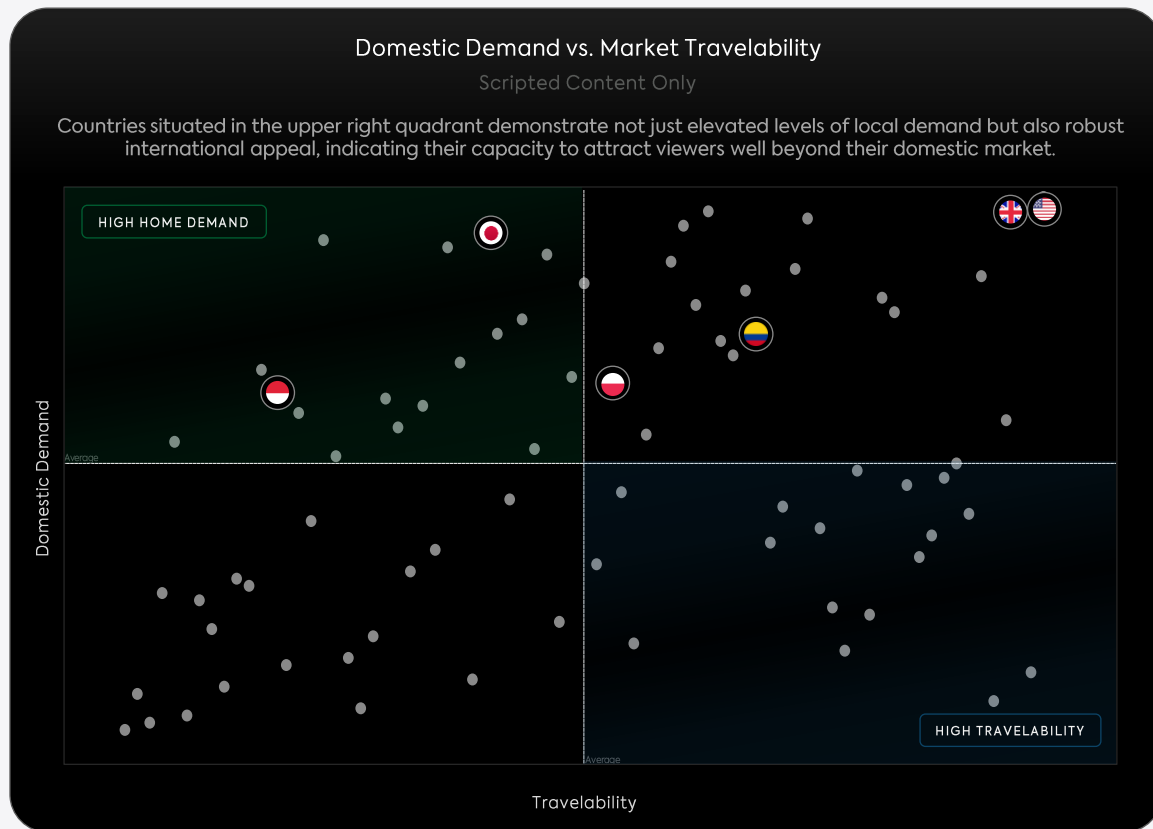
Why? Because they deliver universality through specificity, helping audiences feel seen regardless of nationality.



Unearthing Hidden Gems



Going beyond the usual suspects



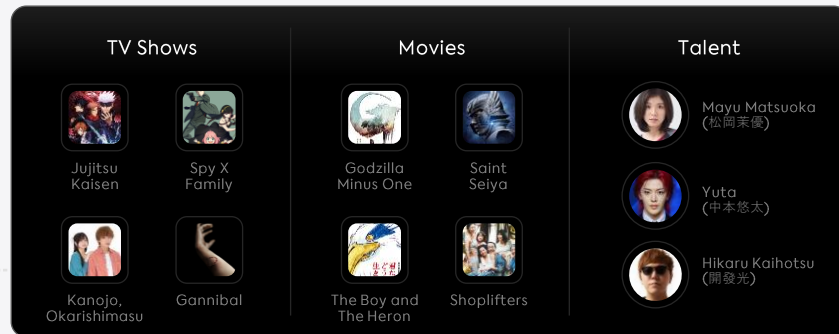
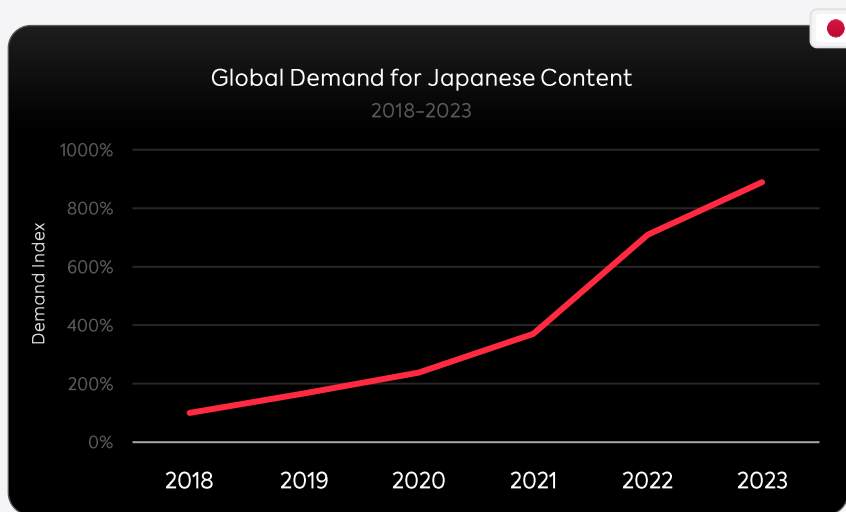
Looking at the content performance of titles from ‘non-traditional’ markets, we see many that have travelled beyond borders.

This highlights potential ‘content goldmines’ that are untapped, particularly given the changing consumer demands.

Markets like Colombia & Poland stand out as potentials thanks to high travelability of native content, strong audience demand levels domestically and internationally, and concepts/themes that closely mirror the most globally popular English language programming.

Japanese Cinema and Television Captivates Audiences Worldwide

Japanese entertainment, spanning from the high-energy anime series to the evocative realms of its cinema, has captured the imagination of audiences globally. Animated series like *Saint Seiya* offer a blend of mythology and action that resonates across cultures, while *Jujitsu Kaisen* embodies the supernatural with its intense story arcs, carving out a loyal fanbase. *Spy X Family* juxtaposes the spy genre with familial bonds, creating a unique narrative that appeals to viewers of all ages.

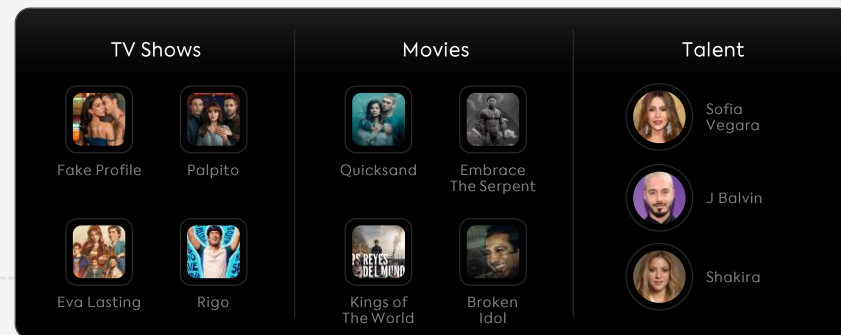
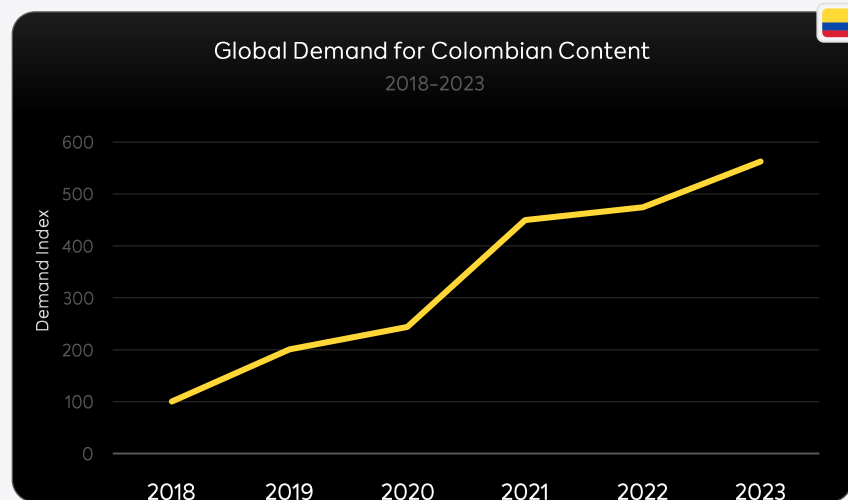


On the cinematic front, films like *Godzilla Minus One* reimagines the iconic monster saga with a contemporary twist, and *The Boy and The Heron* explores the delicate interplay between humans and nature. The critically acclaimed *Shoplifters* delves into the nuanced layers of family and society, illustrating the complex moral landscapes that Japanese filmmakers navigate with deftness.

The rising demand for Japanese content is a testament to its unique ability to marry the particular with the universal, the new with the traditional, and the individual with the collective. This growing trend is not ephemeral but a solid movement towards a more inclusive global entertainment landscape where stories from Japan are not just welcomed but eagerly anticipated.

Colombia's Cultural Resurgence is Thanks to Vibrant Storytelling and Influential Stars

Similar to the Middle East, Colombian culture places a significant emphasis on family-oriented viewing, with a rich tradition of storytelling that reinforces social bonds and cultural heritage. Colombia's cultural exports have been experiencing a notable rise in demand in recent years, capturing global audiences with a blend of compelling storytelling and vibrant cultural representation. TV shows such as *La Reina del Sur* and *Pálpito* have crossed borders with their thrilling plots and complex characters, augmenting the intensity of telenovelas with modern production values.



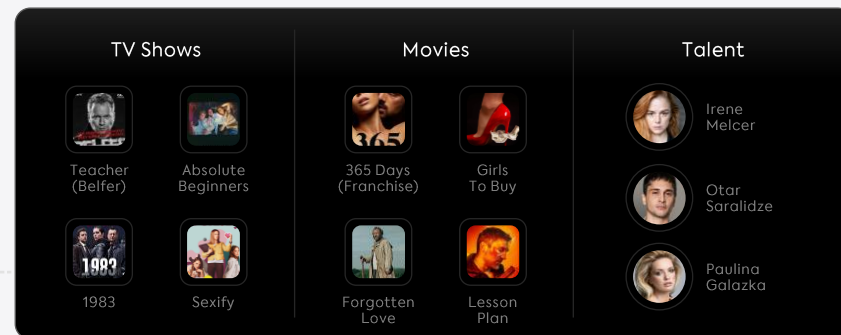
Colombia's filmmakers capture the beauty and complexity of their land, from its lush landscapes to its urban vibrancy, such as in the film *Running with the Devil*. Storytellers are not afraid to tackle hard-hitting topics that resonate on a human level and inspire change, making their films more accessible and impactful.

The global influence of Colombian talent extends beyond the screen with artists like *Karol G* and *J Balvin* revolutionizing the music scene, while stars like *Shakira* and *Sofia Vergara* have become household names worldwide. Their international success has shone a spotlight on Colombia, driving interest back to the country's local media productions and contributing to the growing demand for Colombian entertainment worldwide.

Polish Cinema and Television is Breaking Out on the International Stage

Polish cinema continues to push the envelope, captivating global audiences with its bold storytelling and artistic audacity. The *365 Days* franchise reflects Poland's modern worldview on passionate narratives, while *Girls to Buy* is an exploration of provocative themes that challenge the status quo.

In a different vein, *Forgotten Love* represents a poignant journey through personal and historical landscapes. These films not only entertain but also provoke thought and conversation.



On the television front, Poland offers a rich array of narratives that capture the imagination. *The Teacher* is a gritty, compelling series that is built upon intense character studies and moral quandaries. *Absolute Beginner* takes us through a vibrant, yet challenging journey of youth and discovery, reflecting an evolving Polish culture.

Meanwhile, *1983* is a riveting series that weaves a complex story through the shadows of history, blending the lines between the past and the present to tell a story that transcends time.

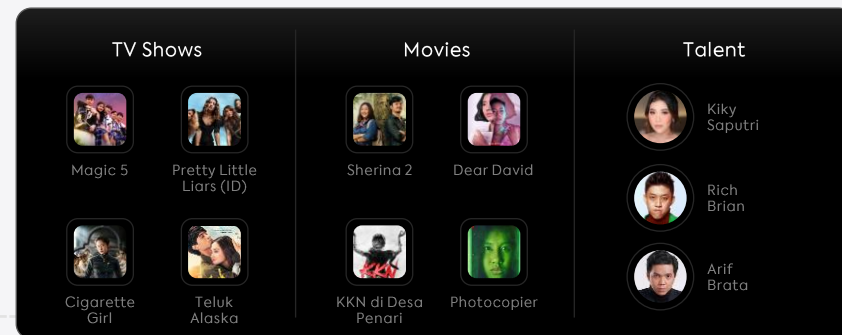
Polish talent also shines brightly, with actors and creatives like *Irena Melcer*, *Otar Saralidze*, and *Paulina Galazka* resonating beyond the borders of their home country.

Indonesian Content Blends Local Lore and Universal Stories to Appeal to A Growing International Audience

Indonesian movies like *Photocopier* and *Dear David* resonate globally by showcasing relatable experiences against the backdrop of a rich local culture.

The horror genre, with films such as *KKN di Desa Penari*, uniquely blends suspense with traditional myths, illustrating the potency of Indonesia's narrative traditions.

The adaptation of global phenomena like *Pretty Little Liars* to Indonesian settings exemplifies the successful fusion of international formats with local flair.



From 2018 to 2023, the demand for Indonesian content has seen a marked increase, driven by the accessibility afforded by global streaming services. These platforms have been crucial in presenting Indonesian stories and talents like *Rich Brian* and *Arif Brata* to a worldwide audience, highlighting their versatility and cultural depth.

Indonesia's vibrant media landscape is thriving internationally, as it continues to innovate and craft stories that are both deeply local and universally engaging. This trend reflects a broader movement where diverse voices and perspectives are gaining prominence on the world stage.

Creating the Next Global Sensation



Balancing localization and authenticity is crucial in adapting international formats



Striking a delicate balance between localization and authenticity is equally crucial when adapting foreign content. This approach involves tailoring cultural nuances to resonate with the MENA audience while preserving the artistic integrity of the original narratives.

Crafting a resonant yet unique story in a crowded market requires precision. Adapting cultural references to align with those of the region is essential and not uncommon.

High quality production is a top priority for any such undertaking. Modern audiences are savvier than ever thanks to the sea of content at their fingertips. As such, they have become harder to please.

Visually immersive storytelling enhances the viewer experience and bolsters global credibility, positioning Arabic and local content as a growing force with rich storytellers setting new benchmarks for on-screen excellence.

Elevating the standards of production requires collaborative efforts across the industry. From content creators and production studios to streaming platforms and distributors, each stakeholder plays a role in this commitment to premium performance.



Methodology





About Parrot Analytics:

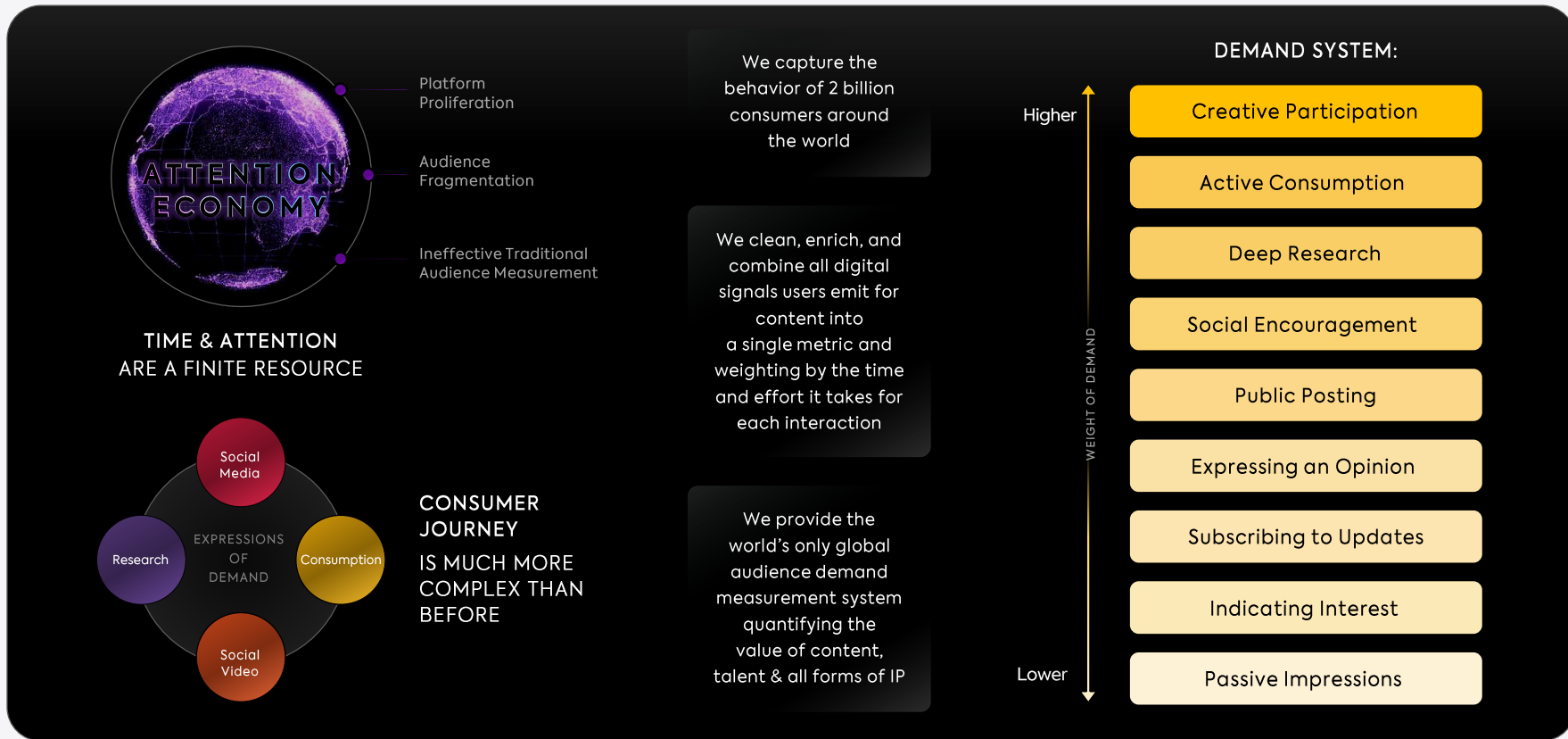
Parrot Analytics is the leader in global entertainment analytics. The company values content, talent and IP by measuring over 2 billion audiences globally. Leveraging audience demand and content supply, Parrot Analytics can determine how much any TV show or movie is worth on a specific platform by region. Parrot Analytics' partners use this knowledge to help better understand global supply and demand across all platforms to value content and talent, drive better production, distribution, acquisition, and marketing decisions, as well as increase D2C growth and retention. For more information about Parrot Analytics, see www.parrotanalytics.com

About Rise Studios:

Rise Studios is an entertainment company driving investment in content from regional markets. It aims to support local talent with sustainable growth in a hub where editorial and operational talent creativity is nurtured and connected with leading regional and global platforms. The company uses industry expertise and data intelligence to identify audience needs and desires with precision, driving long-term, diverse and bespoke content investments.



What is Demand? Quick Recap





Unlocking the magic of content in the attention economy



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