

No Passports Needed

Content is Traveling Across Borders to Meet Audience Demand



Presented by
Paul Hastings
SVP, Whip Media

Global Media + Entertainment Day

Data, Cloud, AI, Security



Content is no longer bound by borders

As streaming platforms proliferate, and demand for programming increases, the international platforms are competing against each other, as well as the local players, which is igniting demand for more local product.

Hidden Truths II Finds Success Beyond Brazilian Borders

Globoplay's made for streaming telenovela attracts international audiences

➤ *Hidden Truths*, season 1, has been licensed to over 75 countries worldwide.

➤ Globoplay reinvented the series and produced a 50-episode telenovela specifically for on-demand.

➤ *Hidden Truths* was also a hit in the Middle East on MBC Group, and renewed the airing rights to the first season plus *Hidden Truths II* for 2022.

➤ The modern franchise is distributing to different partners all over the world.

Delivering Telenovela Content To International Audiences

Globo's telenovela content is now traveling around the world



Source: Angela Colla, Head of International Sales, Globo at Variety Streaming Room Panel.

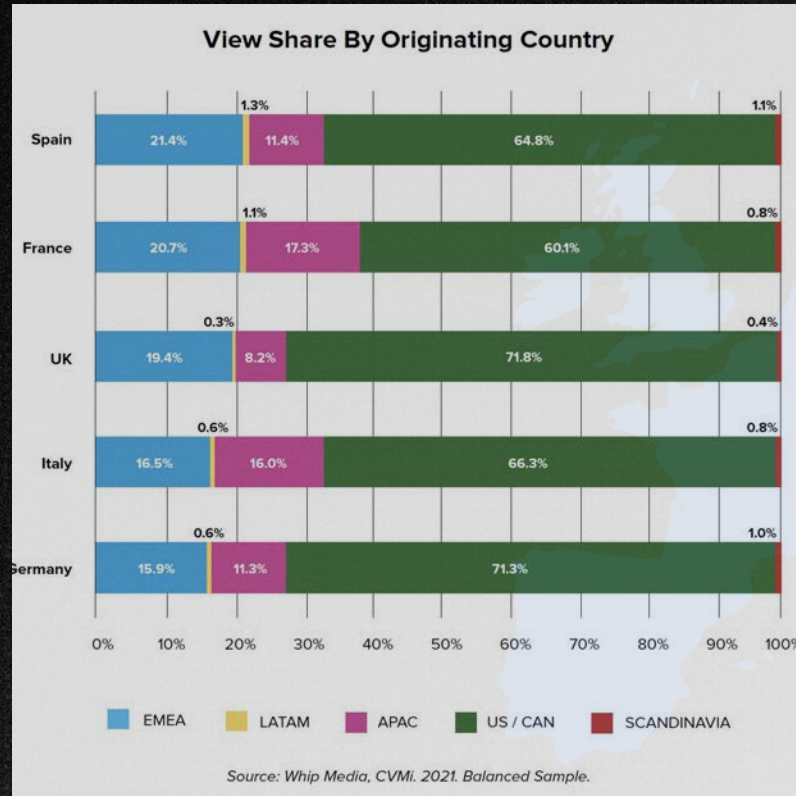
Have Content Will Travel: Strategies for Building a Global TV Audience <https://variety.com/video/whip-media-televisaunivision/>



**Let's take a quick trip around
the world ... of content.**

European Content Landscape

Audiences are watching content from all over the world



U.S. content share of viewing is down 10% in Europe

Streaming platforms are finding programming from more sources and producing more local content

- Programming from Japan and South Korea as well as locally produced content has been attracting viewers
 - Squid Game is mostly responsible for South Korea's increase
- European policy has had a role - requiring a 30% quota for local platforms to serve European originating content to subscribers

Let's Start at Home

Change in View Share (2021 vs. 2019)

Source: Whip Media, CVM. 2021 vs. 2019. Balanced Sample.

United Kingdom



🇬🇧 Top Ten Non-US Titles in the UK

Title	Originating Country	Platform
Love Island	United Kingdom	ITV, Apple TV+
Emmerdale	United Kingdom	Amazon Video, Sky Go, BritBox, ITV
Squid Game	South Korea	NETFLIX
Vikings	Canada	Amazon Video, iTunes, Amazon Prime Video, YouTube, Facebook
Line of Duty	United Kingdom	Apple TV+, Amazon Video, iPlayer, NETFLIX, Channel 4, ACCUHRP
EastEnders	United Kingdom	Amazon Video, Sky Go, iPlayer
Schitt's Creek	Canada	Amazon Video, NETFLIX
Sex Education	United Kingdom	NETFLIX
Money Heist	Spain	NETFLIX
One Piece	Japan	Crunchyroll, YouTube

Titles percentages: 39.6% US, 9.5% JP, 50.9% all others

Source: Whip Media, CVM. UK users, 2021. Balanced Sample. Platform information supplied by BB.

Audiences in Spain are Tuning in for Local and Non US Programming

Spain had one of the stronger increases in European view share from local programming

- Spanish content holds a 42% share of views in Spain (excluding the US & Japan), and had the biggest view share increase since 2019 in Spain, with just over 3%
- Other content suppliers like the UK, Canada and France are also gaining viewshare
- South Korea holds a significant share too



HONORABLE MENTION

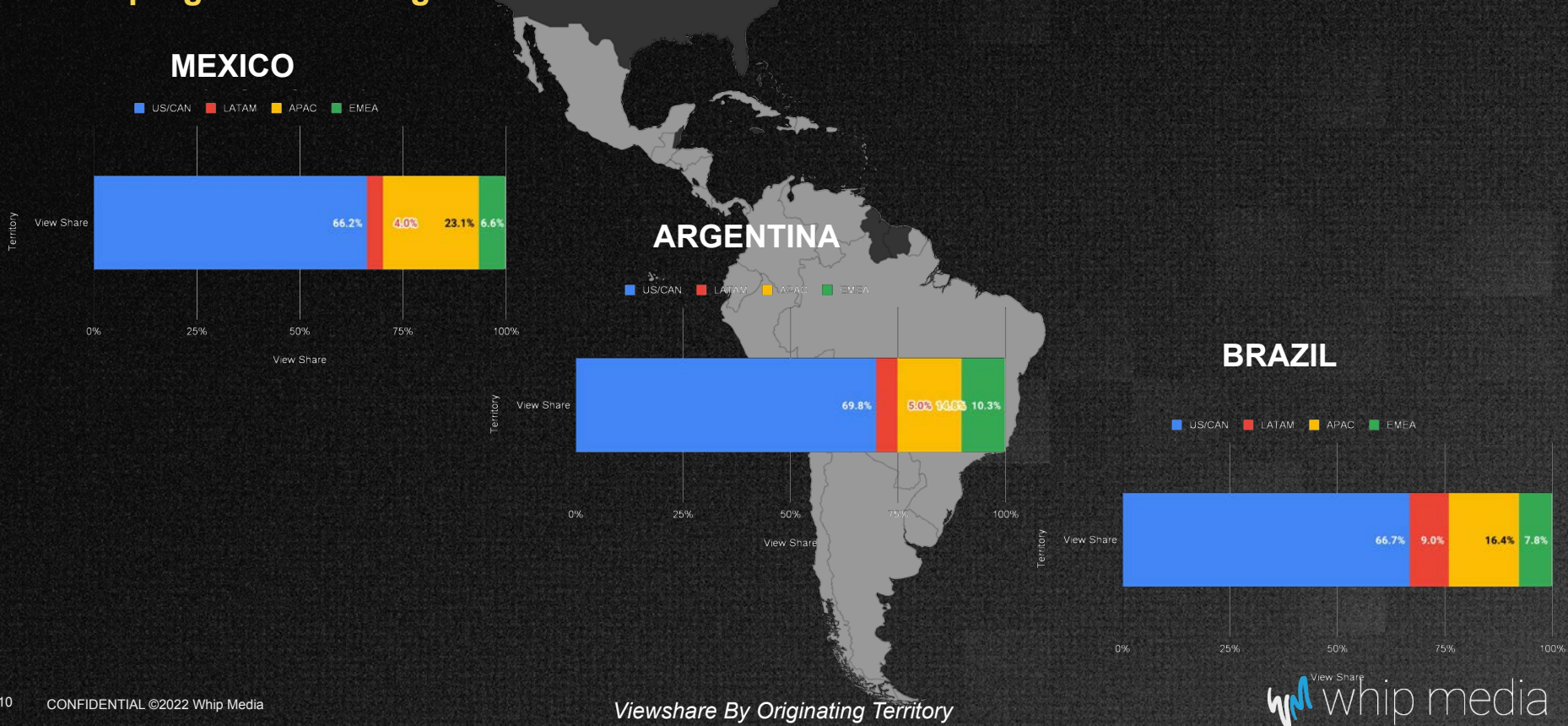
Turkey

Has gained viewer share with audiences in Spain since 2019



Latin America Content Landscape

Mexico has a much higher share of viewing from APAC (mostly Japanese anime) programs than Argentina or Brazil



Brazilian Audiences Are Tuning In For More Local Content

Brazil had one of the stronger increases in view share in LATAM from local programming

- Excluding the huge share of programming from the US and Japan, **Brazilian content holds a 30% share of views in Brazil.**
- Japan (mostly anime) and relative newcomer South Korea are also capturing audience attention
- Other familiar content suppliers from the UK, Spain, as well as Mexico, China and Canada are also attracting viewers



HONORABLE MENTION

UK

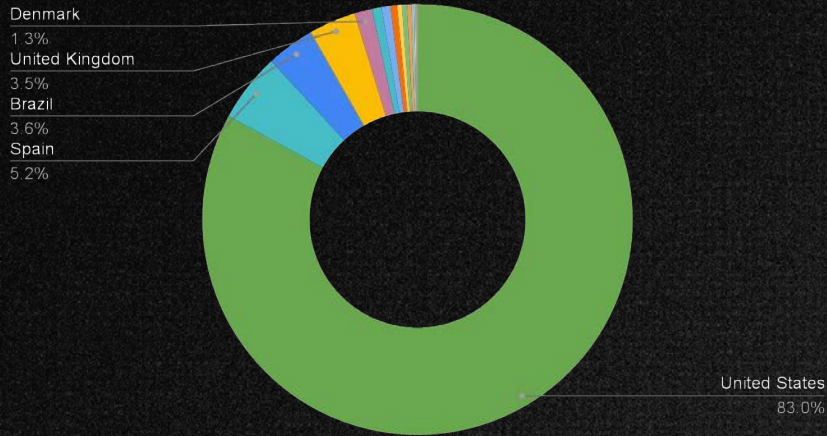


UK dramas, several with younger skews, have gained traction in Brazil.

Diverse Content Licensing is the Norm

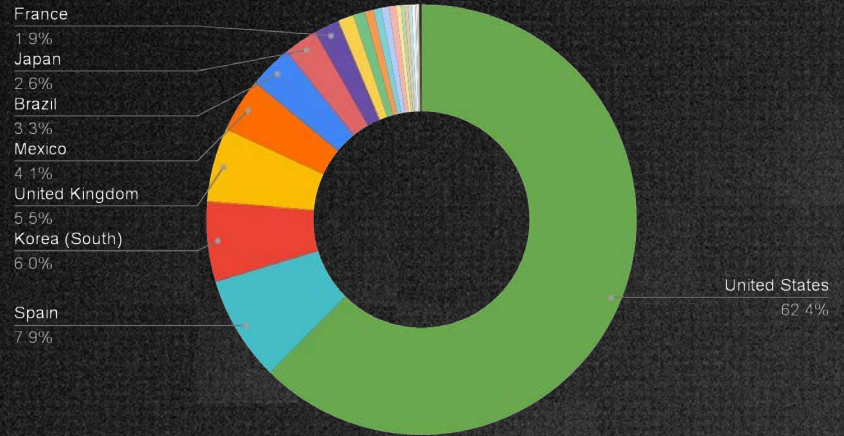
For example, Netflix's view shares are now spread over many countries than three years ago

NETFLIX/BRAZIL View Share By Originating Country



2018

NETFLIX/BRAZIL View Share by Originating Country



2021

The US view share has ceded the most ground, down almost 20%

Our Finger is on the Pulse of Today's Content Trends

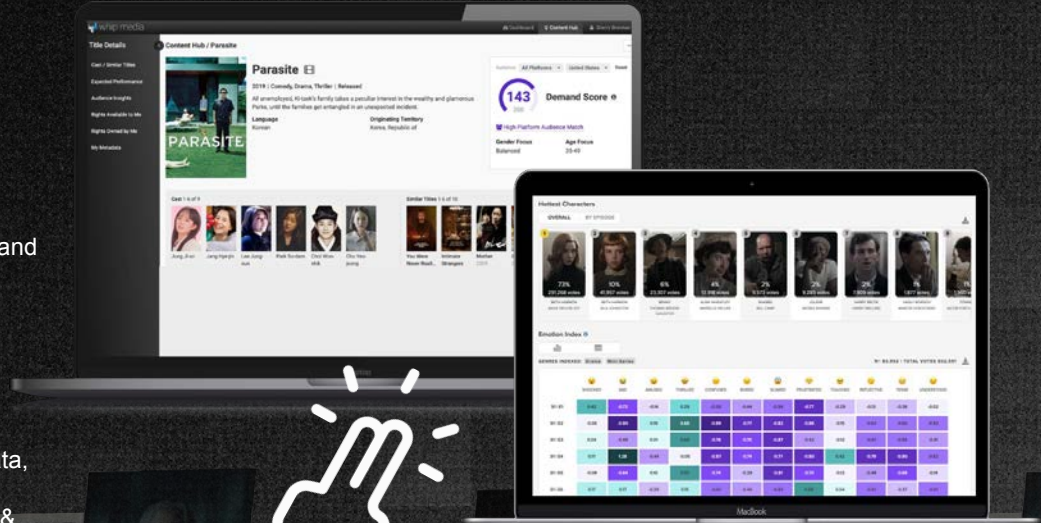
Equipped with the tools to help you navigate and maximize monetization in this rapidly changing environment



CVM Insights is a content intelligence solution utilizing its unique first-party data collected from over 21 million global active users, continuously capturing viewing intent, engagement and affinity data for content across platforms and devices.



The Whip Media Exchange is a first-of-its-kind content licensing and research platform with real time access to data, content performance predictions, communication tools and unified commerce capabilities for buyers and sellers of TV & film content.



Thank You!



Paul Hastings
phastings@whipmedia.com

Global Media + Entertainment Day

Data, Cloud, AI, Security

