



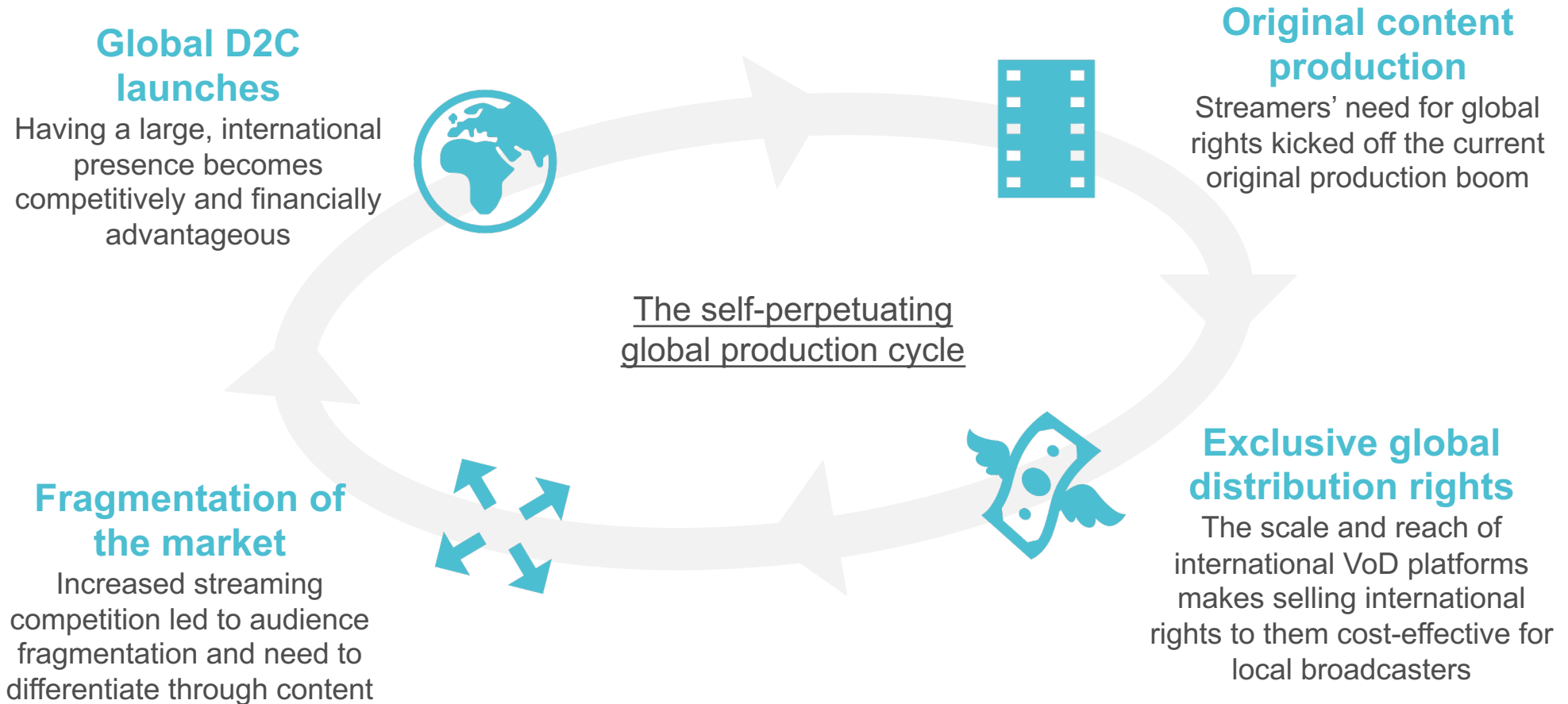
AMPERE
ANALYSIS

Analysing Consumer Demand for Localised Content

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25 Feb 2021

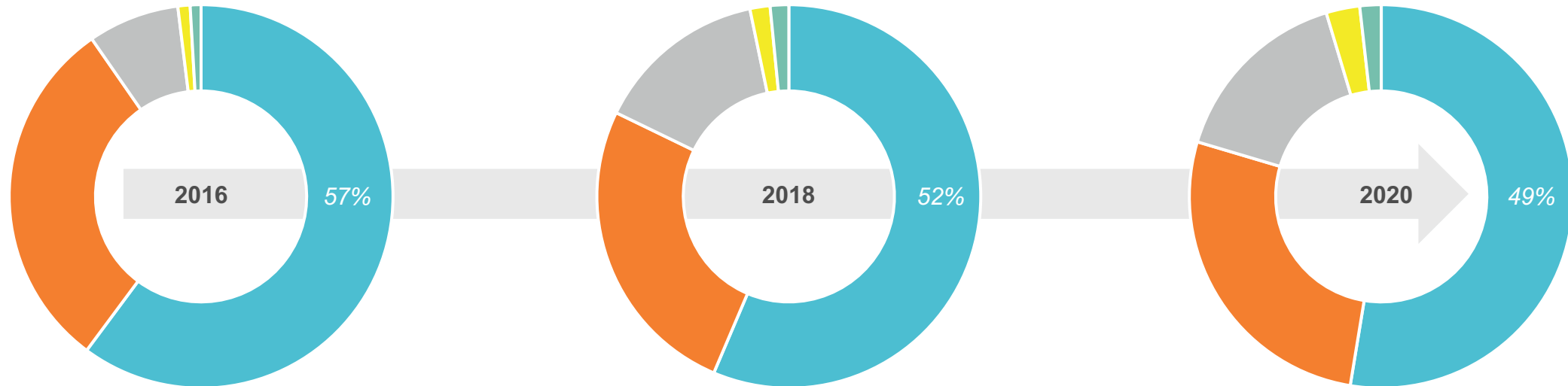
Content production and distribution is becoming increasingly globalised



Making content increasingly available across countries – so now SVOD content is localizing

Percentage of Netflix and Amazon Prime Video's European catalogue by region of origin

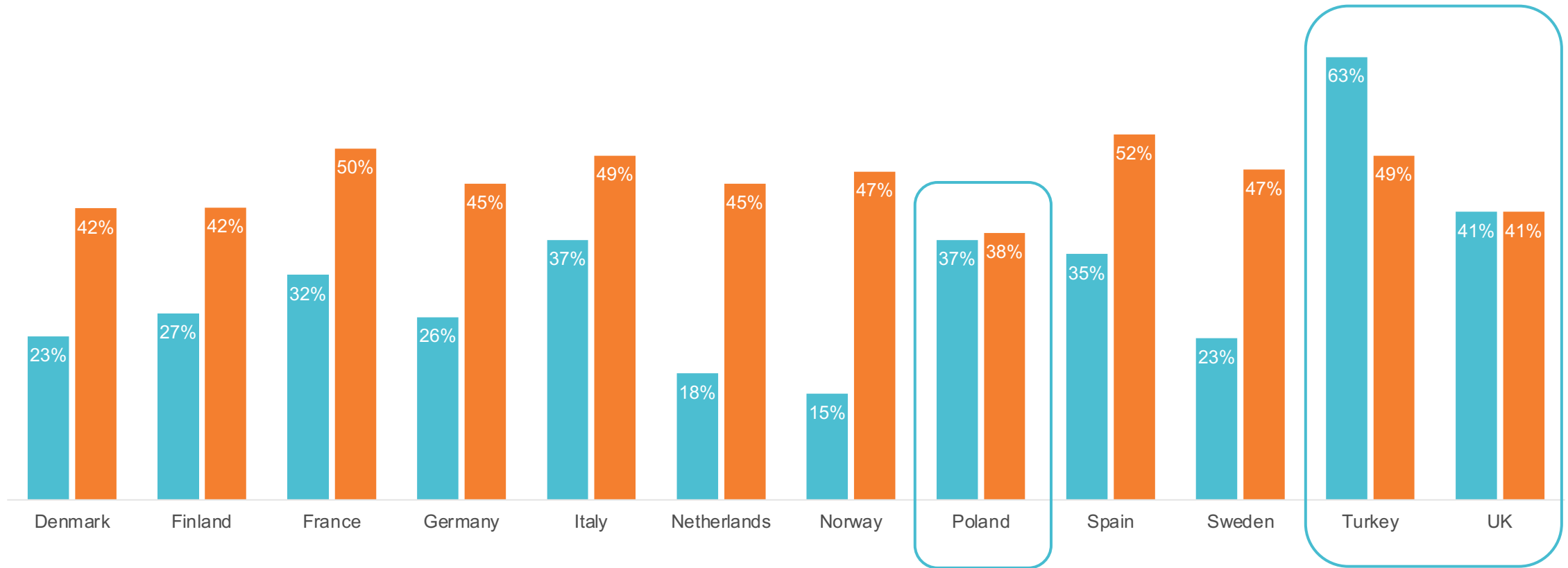
■ North America ■ Western Europe ■ APAC ■ CEE ■ Rest of world



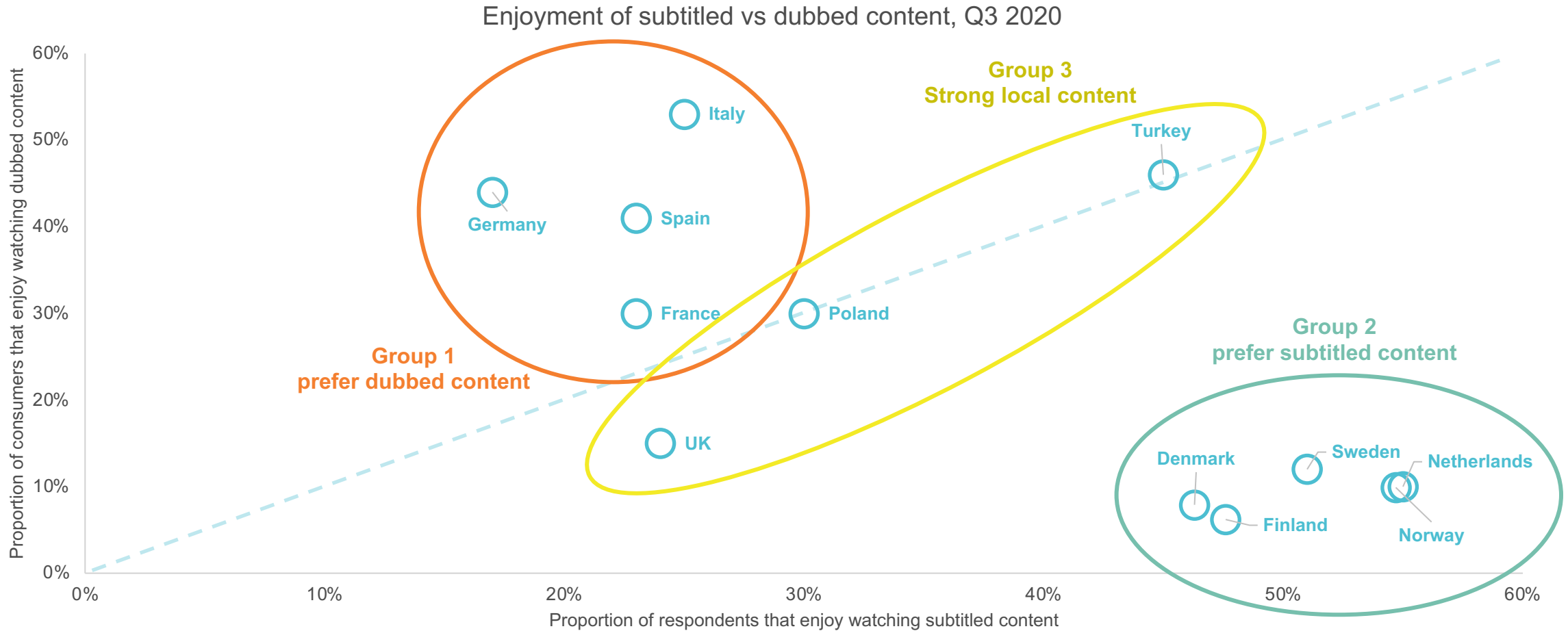
Consumer preferences for local vs international content vary widely across European markets

Proportion of consumers which watch local content vs US content on a frequent basis

■ Local content ■ US content



As does the extent to how they enjoy watching content not in their local language



Younger consumers are more amenable to subtitles or content in its original language

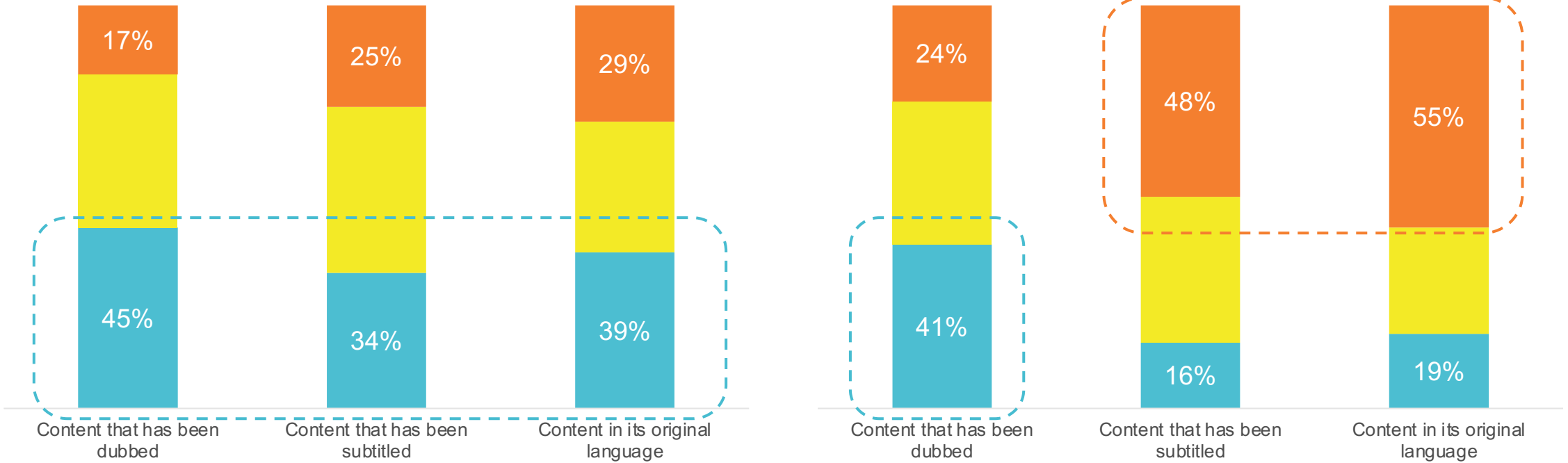
Group 1 - France, Germany, Spain & Italy

18-34 year olds, Q3 2020

35-64 year olds, Q3 2020

■ I enjoy watching this way ■ I don't mind watching this way
■ I don't like watching this way

■ I enjoy watching this way ■ I don't mind watching this way
■ I don't like watching this way



Older consumers in Group 2 are also more polarised, with 80% not enjoying dubbed content

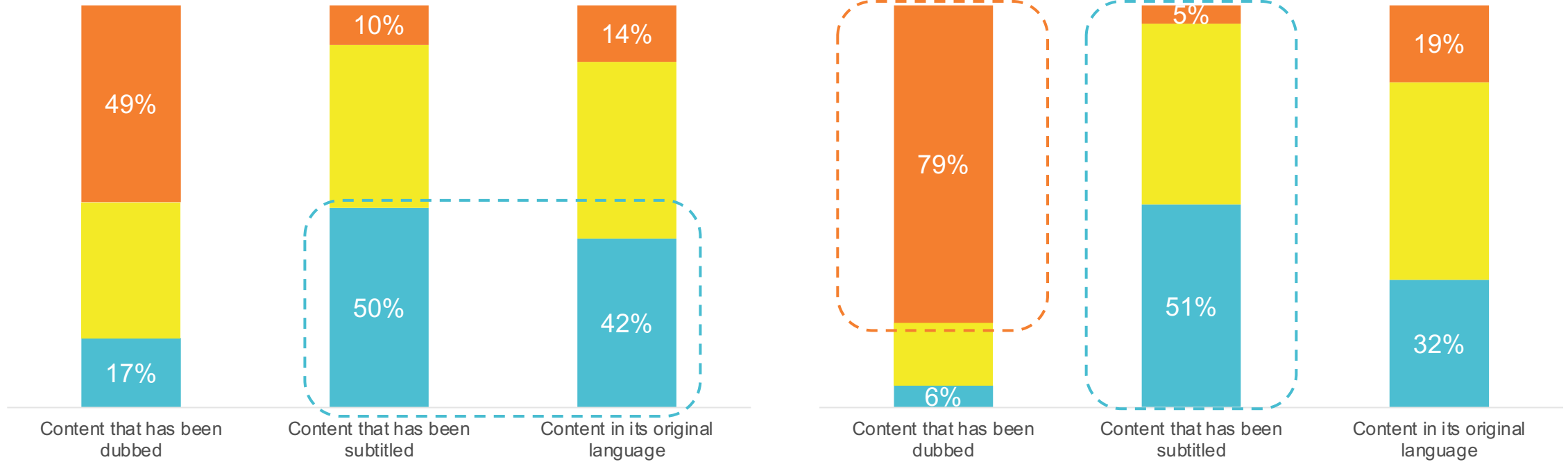
Group 2 – Scandinavia & the Netherlands

Group 2: 18-34 year olds, Q3 2020

Group 2: 35-64 year olds, Q3 2020

■ I enjoy watching this way ■ I don't mind watching this way
■ I don't like watching this way

■ I enjoy watching this way ■ I don't mind watching this way
■ I don't like watching this way



In Group 3, younger consumers over-index for subtitling, while 35s and over prefer dubbed

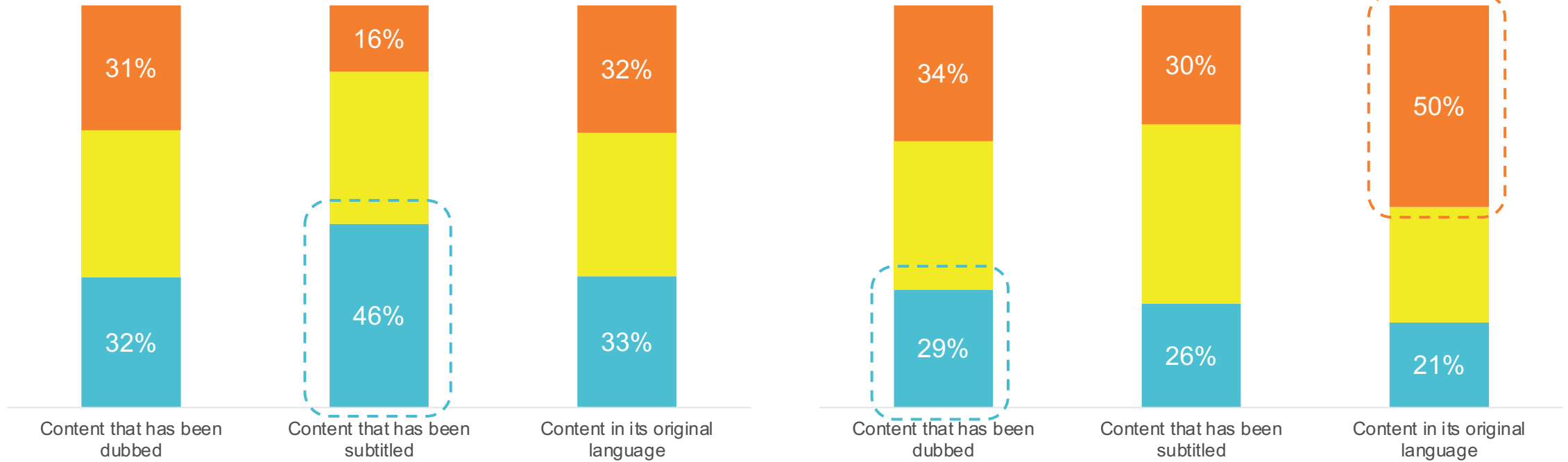
Group 3 – Poland, Turkey & the UK

Group 3: 18-34 year olds, Q3 2020

Group 3: 35-64 year olds, Q3 2020

■ I enjoy watching this way ■ I don't mind watching this way
■ I don't like watching this way

■ I enjoy watching this way ■ I don't mind watching this way
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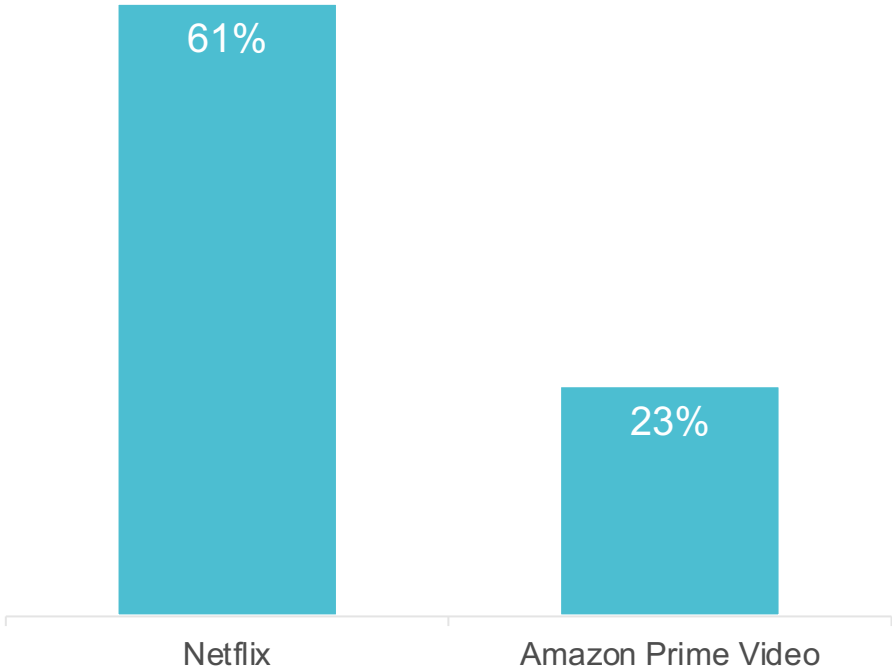
Consumers that enjoy subtitled or dubbed content are likely to take at least one SVOD service

Number of SVOD subscriptions in the home of respondents who enjoy subtitled or dubbed content, Q3 2020

- 0 services
- 1 service
- 2 services
- 3 services
- 4 services
- 5+ services



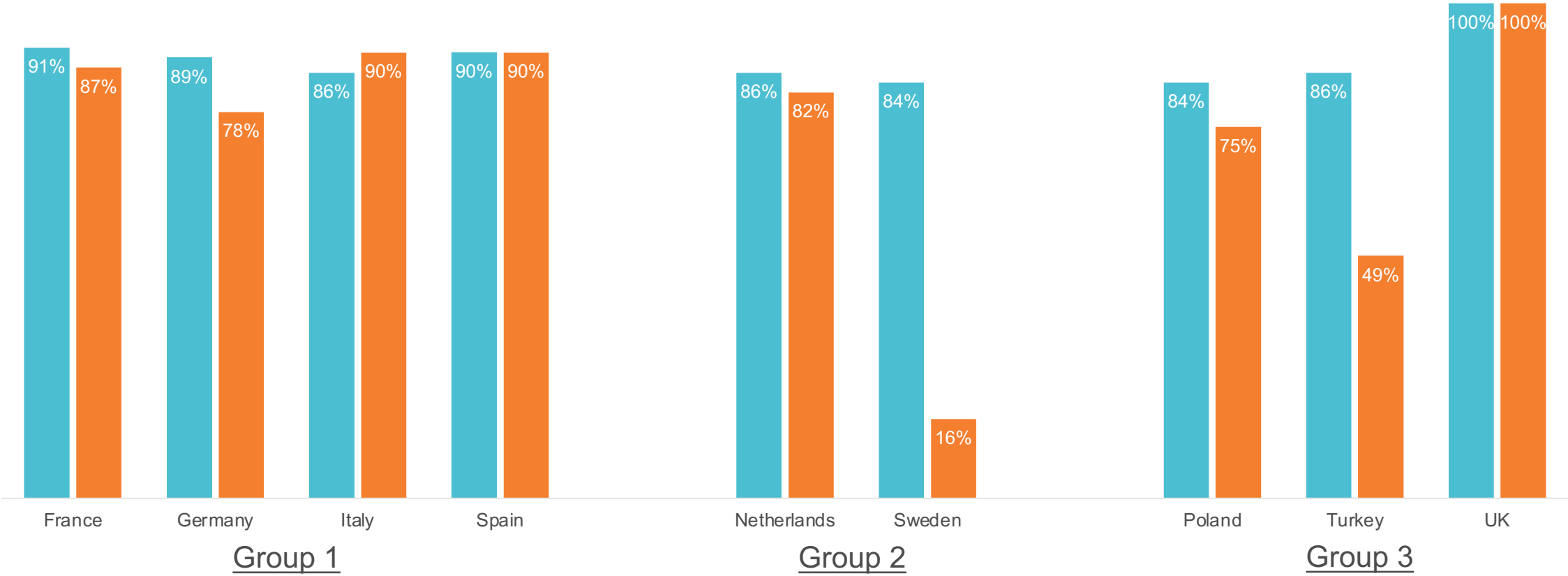
Proportion of respondents that enjoy subtitled or dubbed content that subscribe to Netflix and Amazon Prime Video, Q3 2020



In most markets, catalogues are localised to a high degree – with some gaps

Proportion of catalogue that is localised (subtitles **or** audio available in local language), Jan 2021

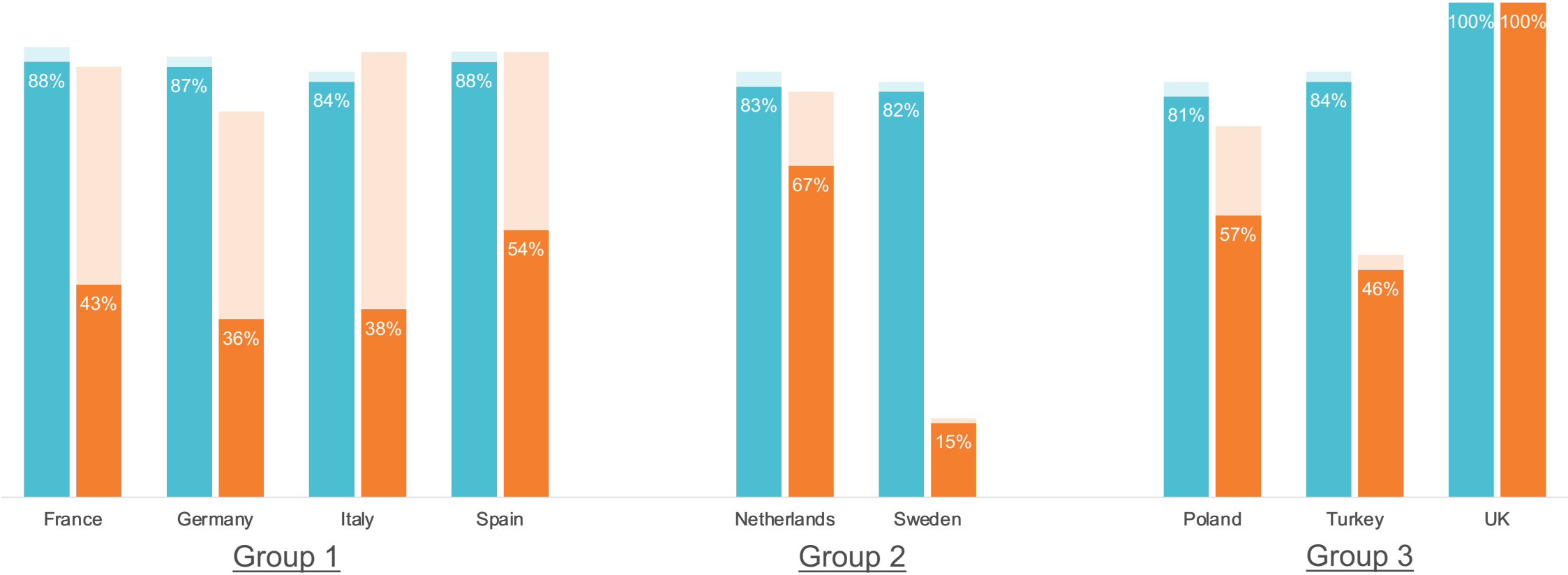
■ Netflix ■ Amazon



Netflix has primarily achieved this via offering local language subtitles

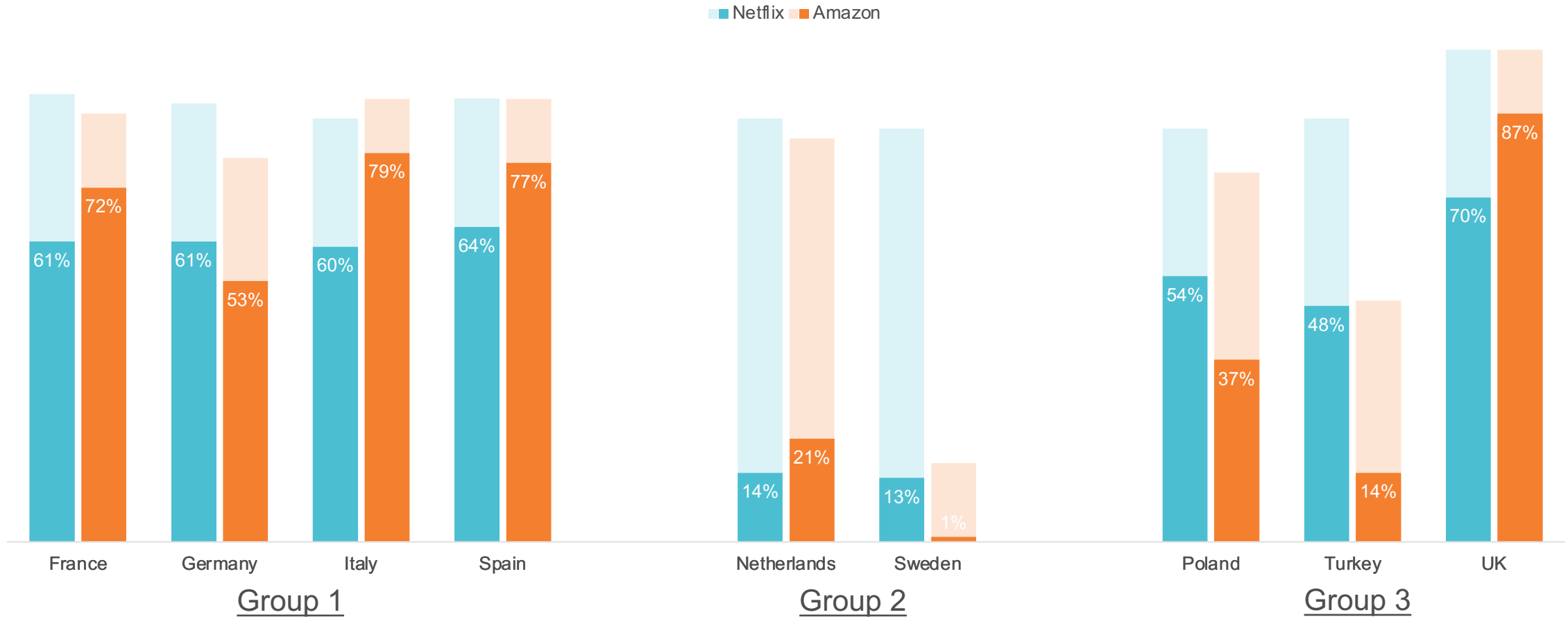
Proportion of catalogue with local language subtitles, Jan 2021

Netflix Amazon



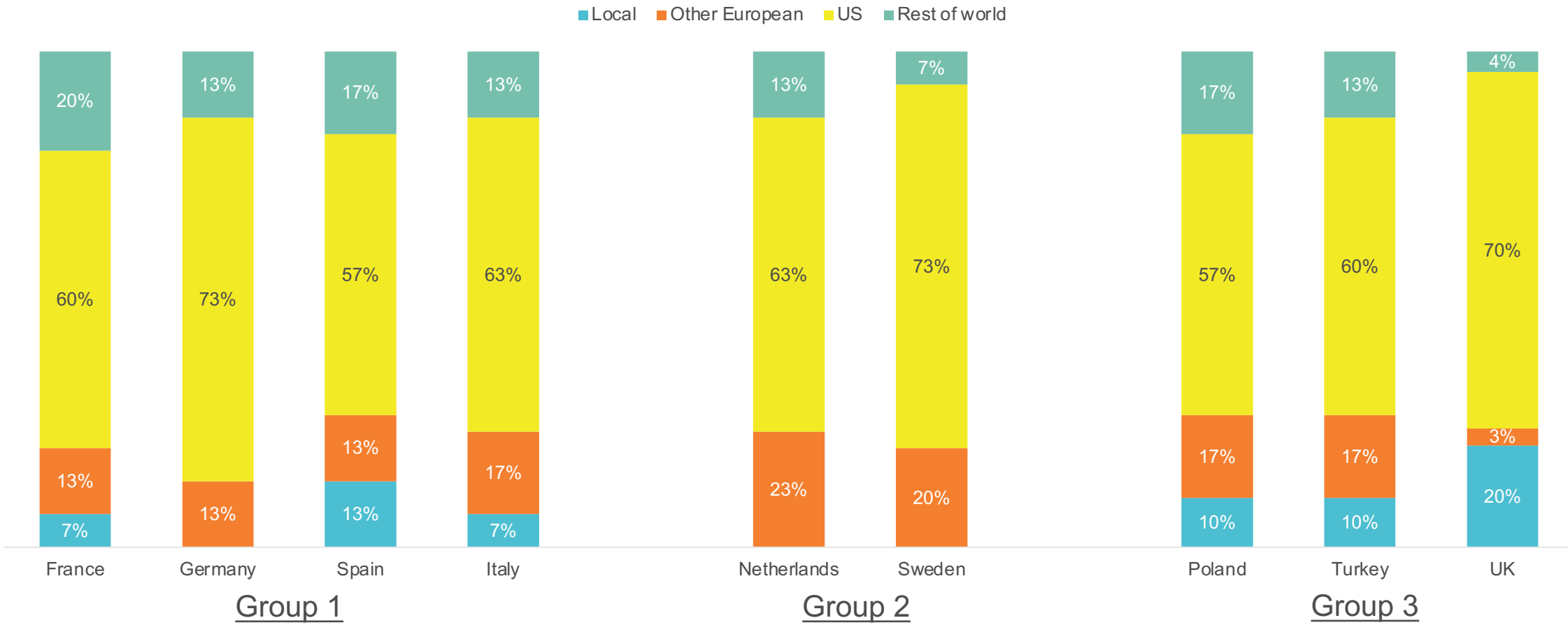
Whereas Amazon provides more audio language coverage in markets where dubbing is key

Proportion of catalogue with local language audio, Jan 2021



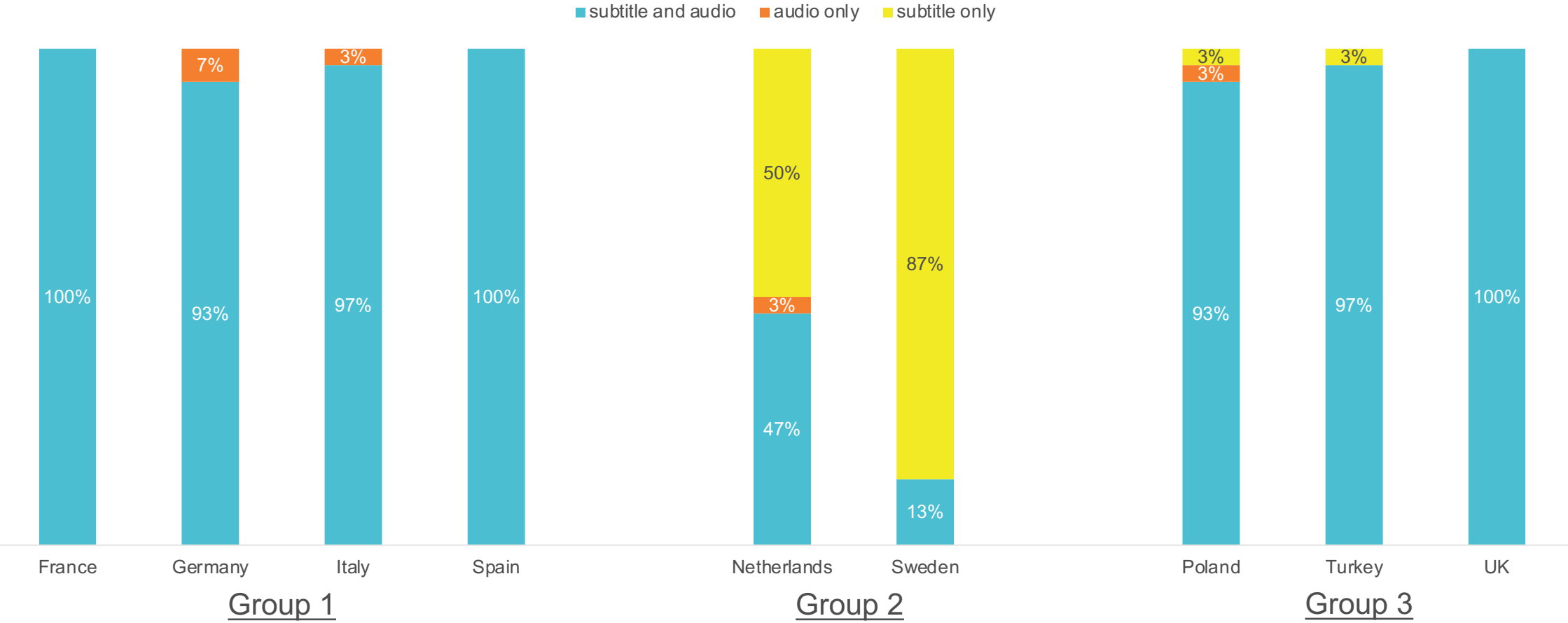
Netflix's top 10 lists show that overseas content makes up the bulk of popular titles in Europe

Top 30 popular titles on Netflix by country of origin, Jan 2021



And all of these popular titles are localised to some degree

Top 30 popular titles on Netflix by local language availability, Jan 2021



Executive summary



Content production and distribution has become increasingly globalized and the original language of titles on SVOD is diversifying – meaning the need for localisation in terms of subtitling and dubbing is also increasing



The importance of international content is significant, with many consumers across Europe watching US content more frequently than movies or TV shows made in their own country



Some markets show a clear preference for watching dubbed international content (Germany, France, Italy, Spain) while consumers in other markets much prefer subtitling (Scandinavia and Netherlands)



The degree to which streamers Netflix and Amazon have localised their catalogues broadly aligns with consumer preference – but there are some gaps, mainly in dubbed content in certain markets



The degree of localisation for popular titles on Netflix is higher than the catalogue as a whole, showing the importance of subtitling and dubbing for the streamer – particularly with original content





Any questions?

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