

# Attracting Regional Audiences with Original Content:

The latest trends among the biggest names in Streaming



Presented by  
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Media Research & Insights Lead



**ENTERTAINMENT EVOLUTION**  
SYMPOSIUM

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## Transforming the Global Content Licensing Ecosystem

We are witnessing the greatest proliferation in content and audience fragmentation in history due to exponential growth of streaming platforms

## WHIP MEDIA IS POWERING THIS REVOLUTION

Our SaaS platform centrally connects data, processes and people throughout the entire entertainment ecosystem

# Whip Media has Been Preparing for this Moment

## Uniting strategic assets and expertise across media, technology & data

### T TV TIME

#### Acquired 2016:

Provides insightful consumer engagement to promote the discovery and tracking of OTT content, while collecting unique sentiment data from over 18M users. The “why behind the watch.”

### mediamorph

#### Acquired 2019:

Mission critical software that keeps up with the exploding distribution models and platforms by managing and tracking content and financial processes - used by all top 7 studios and trusted with trillions of financial transactions.

### tvdb

#### Acquired 2019:

A crowdsourced platform for detailed metadata on 5MM global TV shows and movies. Streamlining the process of title mapping with a centralized system.

## whip media

### 2021

A data-driven approach that transforms the entertainment industry from content centric to consumer centric.

# Our Insights Data comes from the TV Time App

Since 2011 our users tell us real-time what they follow, watch and how they liked it!

## FOLLOW

new shows and movies to watch  
with customized recommendations

## FIND WHERE

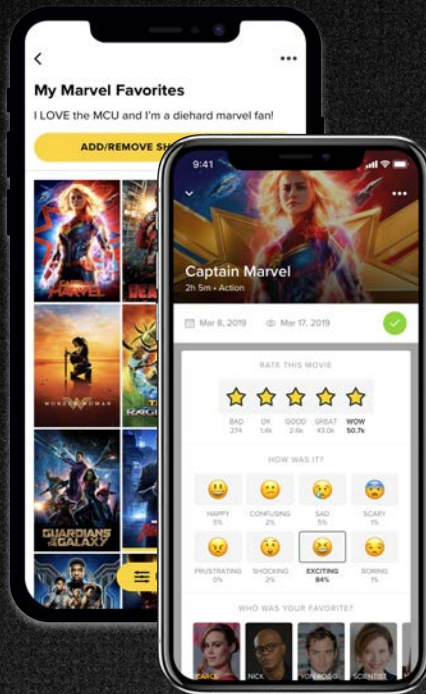
to watch my shows  
and movies

## TRACK

shows and movies  
I'm watching

## DISH

On how I really felt about each  
episode and film



**Over 20 Billion**

Real-time TV and movie insights  
from millions of global consumers

**5 Million**

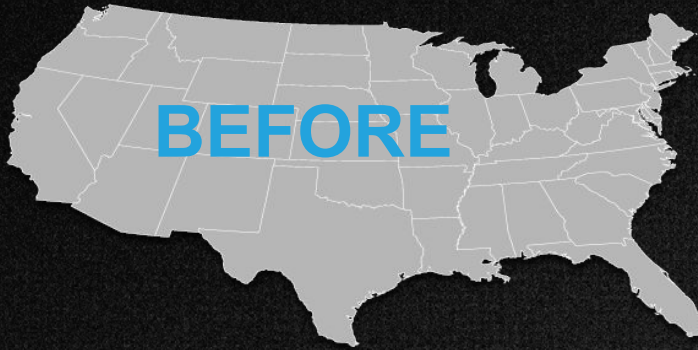
TV Episodes and Films available to  
track in the app - new ones daily

**18 Million**

TV Time Users in over 100 countries

# Programming Goes Global

The US continues to be a leader in production, but the world is catching up



# Doubling Down on International Content

Global demand for content is spurring an historic production boom

## NETFLIX

Developing about 38% non-English-language content

Projected to spend more than \$17 billion on content this year.

Doubling its investment in non-English original content



Developing 24% non-English-language content

To spend up to \$9 billion a year on content for Disney+ by 2024, including 50 international projects - *10/50 are slated for European countries - France, Italy and Germany*

## prime video

Doubling its production of local-language content each year since 2017.

Out of Amazon Prime's 200 million subscribers, the number of international subscribers jumped by 80% in 2020

## HBO MAX



Also increasing spend on local-language content in an effort to attract international subscribers.

Apple TV+ is available in more than 100 countries. HBO Max looks to be available in more than 50 countries by end of 2021.

*"The more authentically local shows are, the more likely they are to play around the world."*

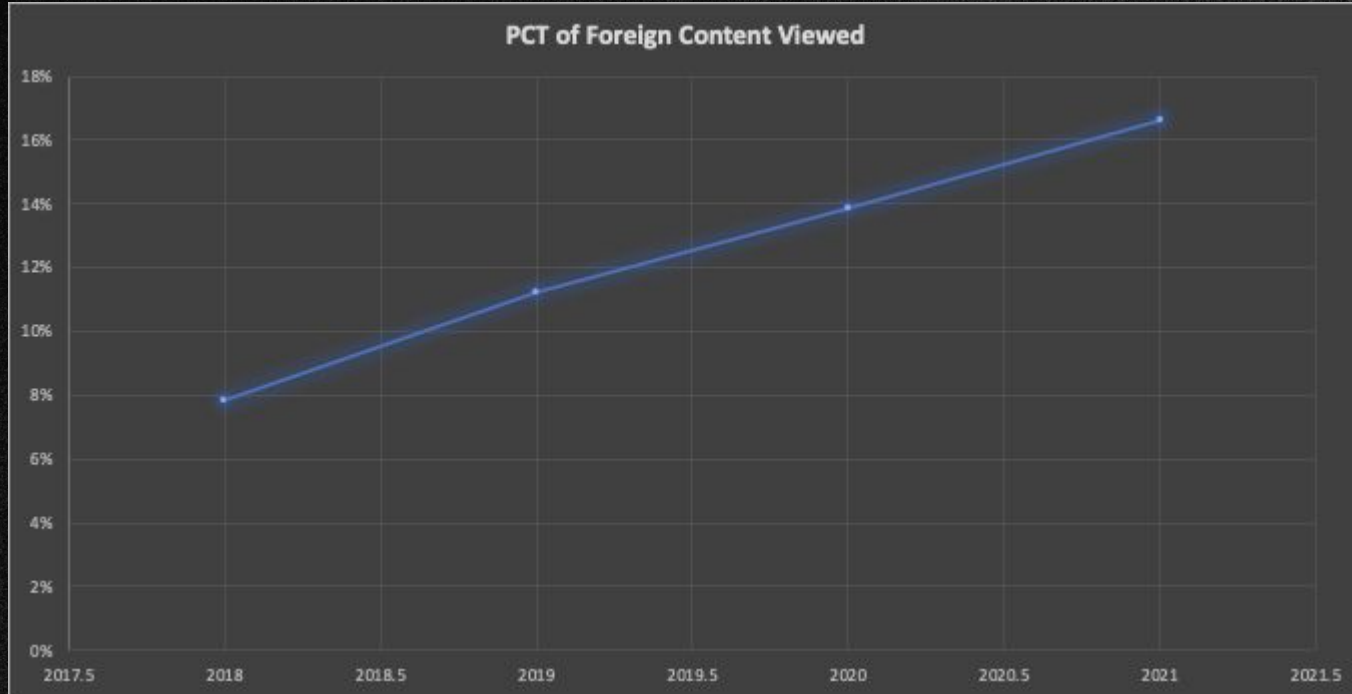
Ted Sarandos

Netflix, Co-Chief Executive & Chief Content Officer

<https://www.wsj.com/articles/netflix-disney-and-amazons-streaming-wars-heat-up-overseas-11619083801>

# Foreign Programming is Catching on in the U.S.

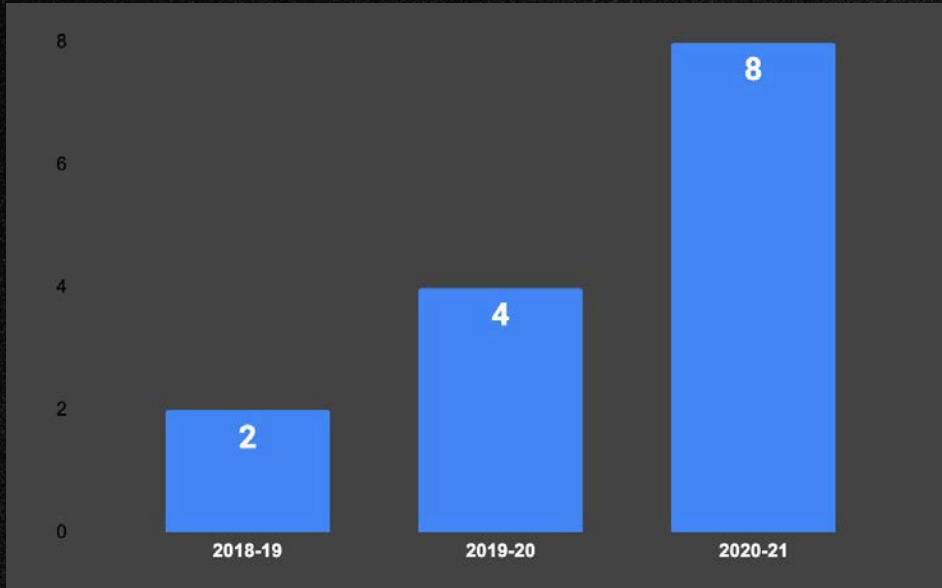
The share of foreign titles viewed in the US has increased every year since 2018



Source: TV Time US users as dated, based on view share.

# NETFLIX | United States

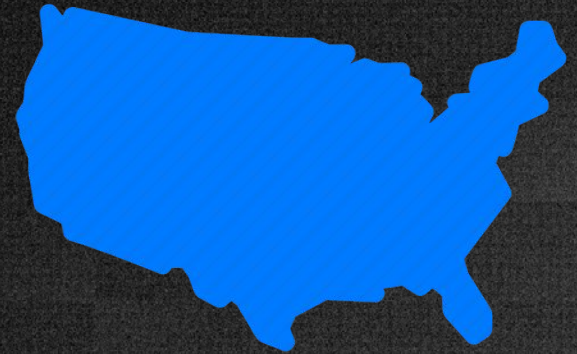
Number of non-US shows in Netflix's top 50 is increasing



Sex Education UK  
The Rain DENMARK

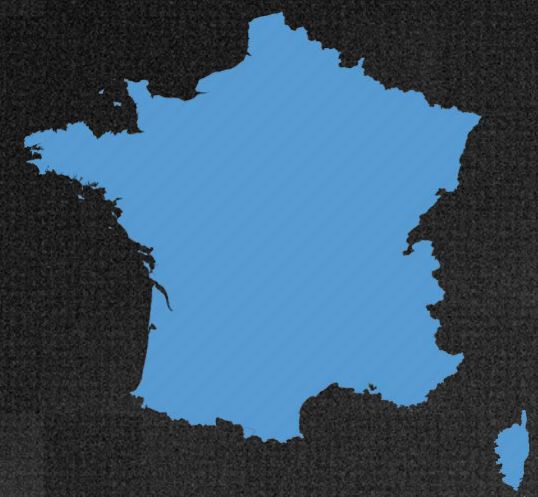
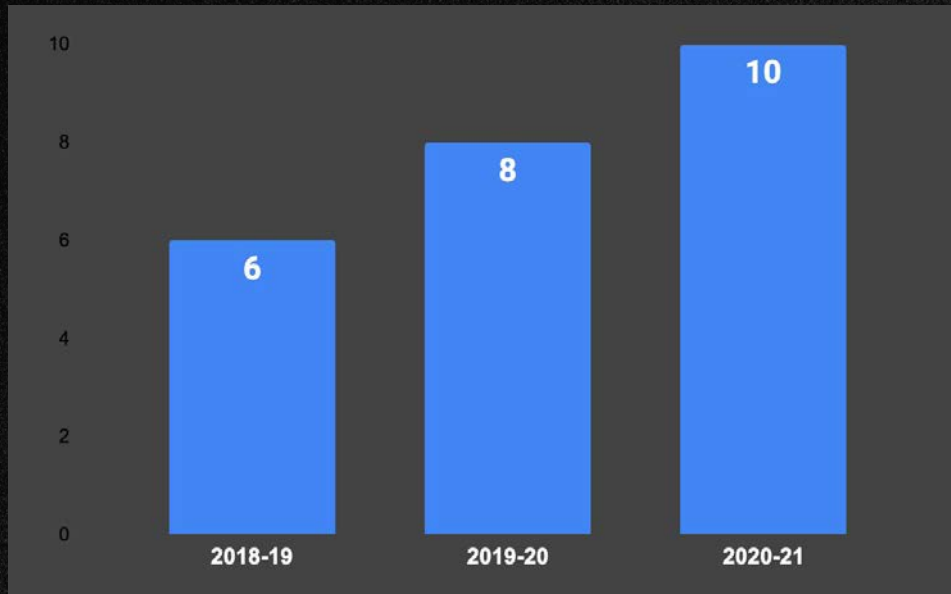
The Crown UK  
Sex Education UK  
Elite ESP  
DARK GER

The Crown UK  
DARK GER  
Elite ESP  
Fate: The Winx Saga UK  
Lupin FR  
Who Killed Sara? MEX  
The Rain DENMARK  
The Irregulars UK





Number of non-US and non-French shows in Amazon's top 50 is increasing



The Grand Tour UK  
 You Are Wanted GER  
 Happy Marriage!? JP  
 Diablo Guardian MEX  
 Six Dreams ESP  
 Breathe INDIA

The Grand Tour UK  
 Blade of the Immortal JP  
 James May: Our Man... UK  
 Alex Rider UK  
 You Are Wanted GER  
 Caronte ESP  
 El Presidente CHILE  
 Take Us Home: Leeds... UK

Truth Seekers UK  
 Alex Rider UK  
 The Boarding School: Las Cumbres ESP  
 The Grand Tour UK  
 We Children From Bahnhof Zoo GER  
 Koikimo JP  
 El Cid ESP  
 All or Nothing: Tottenham-HSpor UK  
 The Pack CHILE  
 Clarkson's Farm UK

Source: TV Time users. July to July as dated, based on view share.



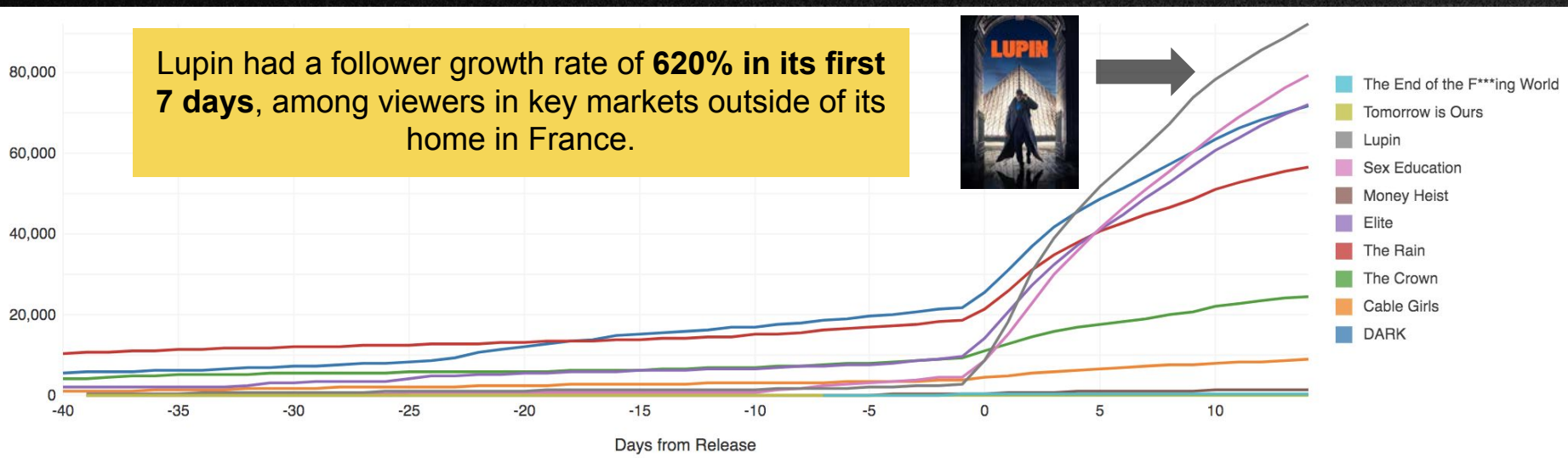
## Spotlight: Lupin

# A Closer Look at LUPIN

## Fastest Growth Rate in Interest/Demand in its First Week Post-Launch

Even when compared to other all-time top TV titles originating from EMEA, and **excluding French viewers from this analysis**, we see Lupin pull the fastest growth rate in its first week post-launch.

Lupin had a follower growth rate of **620%** in its first 7 days, among viewers in key markets outside of its home in France.



Top 10 EMEA-Originating TV Series  
(First debuted between 2016-Present)

Source: CVM Advanced Insights. Followers of each title, aligned from Day 0 (Respective Release Date).  
Based on TV Time balanced users in: US, UK, Italy, Germany, Spain, Brazil, Argentina, Mexico, Canada

# A Closer Look at LUPIN

## Strong Debut Weekend in FIGS-UK

FRANCE	ITALY	SPAIN	GERMANY	UK
1. Lupin	1. Lupin	1. The One That Looms	1. Brooklyn Nine-Nine	1. Cobra Kai
2. Bridgerton	2. Bridgerton	2. Lupin	2. How To Get Away With Murder	2. Bridgerton
3. Chilling Adventures of Sabrina	3. Chilling Adventures of Sabrina	3. Cobra Kai	3. Lupin	3. Chilling Adventures of Sabrina
4. One Piece	4. Grey's Anatomy	4. Bridgerton	4. Bridgerton	4. The Office (US)
5. Vikings	5. Friends	5. Chilling Adventures of Sabrina	5. Chilling Adventures of Sabrina	5. Star Trek: Discovery
6. Attack on Titan	6. MasterChef (IT)	6. 30 coins	6. Grey's Anatomy	6. Modern Family
7. My Hero Academia	7. Convent Mysteries	7. Vikings	7. Vikings	7. Grey's Anatomy
8. Here it all begins	8. Brooklyn Nine-Nine	8. The Mandalorian	8. Star Trek: Discovery	8. RuPaul's Drag Race
9. Grey's Anatomy	9. The Office (US)	9. Grey's Anatomy	9. Big Bang Theory	9. Schitt's Creek
10. Naruto Shippuden	10. How I Met Your Mother	10. The Office (US)	10. The Walking Dead	10. Lupin



## Spotlight: SKY ROJO

# SKY ROJO IN TOP 5 across key EMEA markets during launch

SPAIN		ITALY		GERMANY		FRANCE	
Rank	Show	Rank	Show	Rank	Show	Rank	Show
1	Sky Rojo	1	The Falcon and the Winter Soldier	1	The Falcon and the Winter Soldier	1	Formula 1: Drive to Survive
2	The Falcon and the Winter Soldier	2	Formula 1: Drive to Survive	2	Formula 1: Drive to Survive	2	The Falcon and the Winter Soldier
3	Formula 1: Drive to Survive	3	Sky Rojo	3	Sky Rojo	3	The One
4	WandaVision	4	Ginny & Georgia	4	WandaVision	4	Ginny & Georgia
5	The One	5	WandaVision	5	The One	5	Sky Rojo

Rank Based on Share of Views Among SVOD Originals  
By Country (Balanced) Viewers / March 19-21, 2021





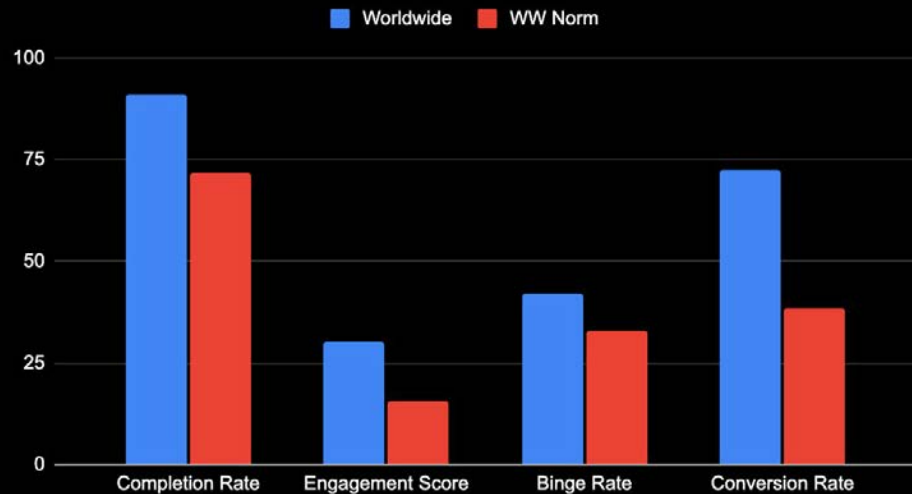
## Case Study: The Serpent



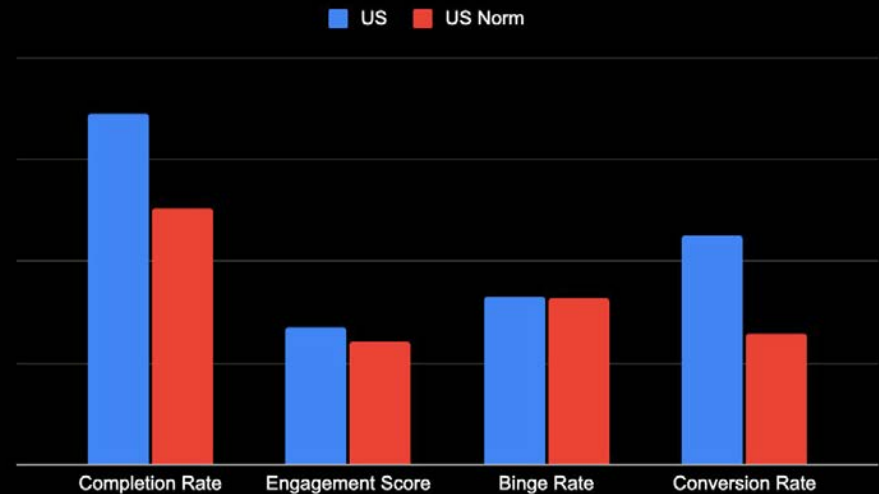
# CASE STUDY: THE SERPENT

A hit in the UK on BBC and BBC iPlayer. Then it went global on Netflix and succeeded globally

## Worldwide



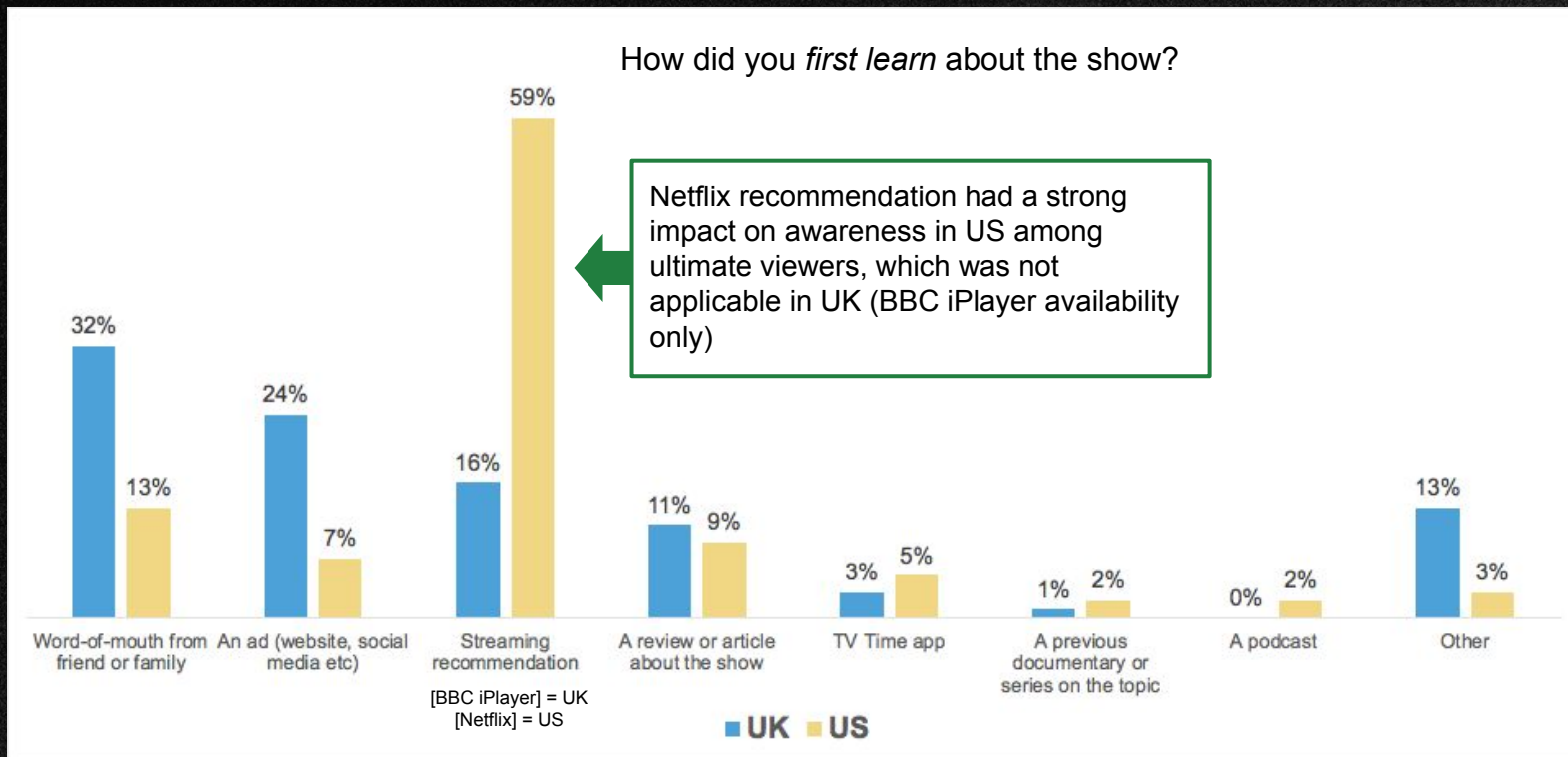
## US and US Norm



Source: TV Time users. Follower Conversion: Percent of followers who viewed an episode. Completion Rate: Percent of available content viewed among show watchers. Engagement Score: Reflects engagement interactions that are weighted depending on their importance. Binge rate: Percent of viewers who watch 4+ episodes within 24 hours.

# The Power of Suggestion

Driving awareness among U.S. audiences utilizing Netflix's recommendation engine





## Quick Look: Anime

# Anime Take Over

Global audiences are consuming and growing the Japanese animation industry

- The global anime market is valued at \$24.23 Billion in 2020 and estimated to reach \$43.73 Billion by 2027
- *Demon Slayer: Mugen Train* was the #1 global theatrical release in 2020, generating \$475 million worldwide and becoming Japan's biggest box office hit ever

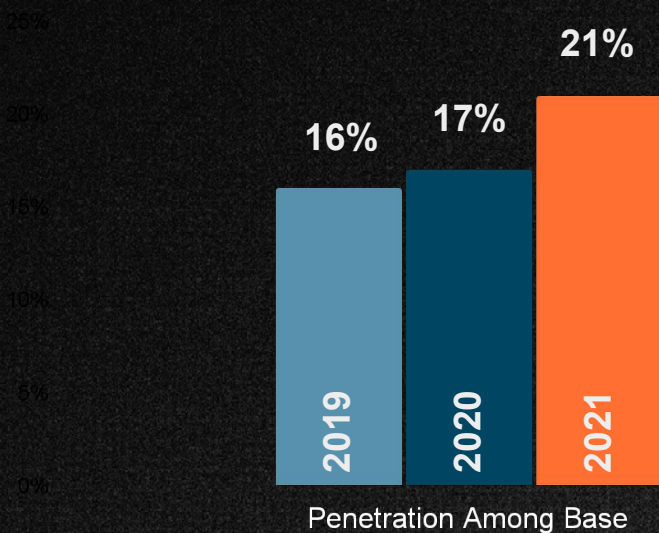


<https://animehunch.com/2021/03/05/anime-industry-growth-estimated-to-43-billion-usd-by-20>

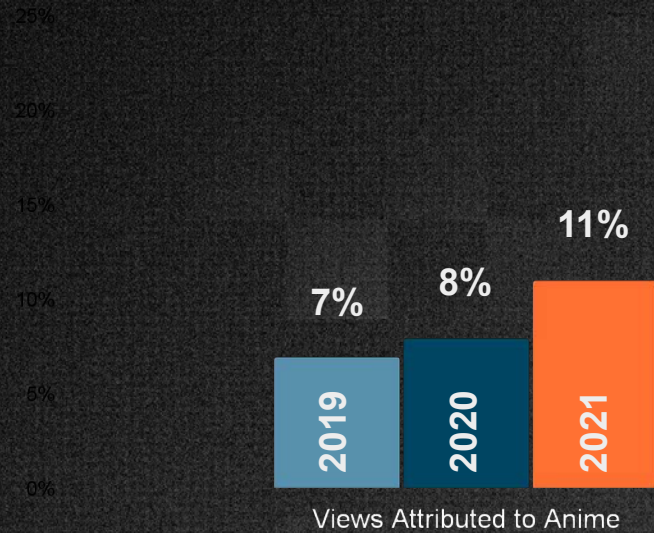
# Anime Has Grown Rapidly Over the Last 3 Years

Just listen to our TV Time community, who can't get enough of it

The percent of viewers watching Anime has grown by **31%**

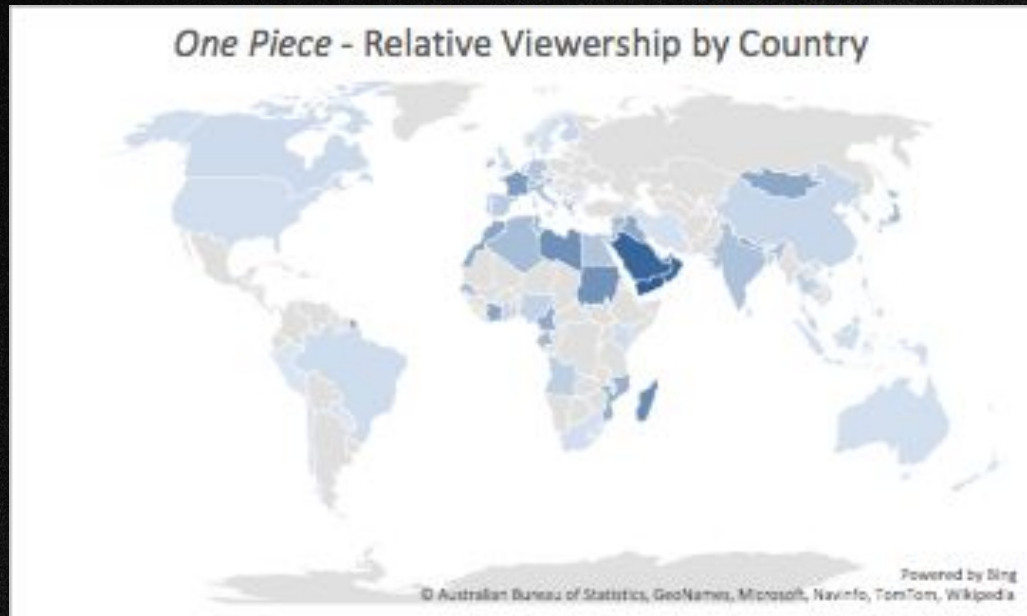


The percent of views attributed to Anime has grown by **57%**



# So Where Does Anime Resonate?

## The Middle East... and France!



- Anime is hugely popular in the Middle East, where *One Piece*, one of the most popular recent titles, heavily over indexes
- In Western Europe, France emerges as a key market for anime viewers; French viewers are 81% more likely to watch *One Piece* than the average viewer
- This holds true for other popular titles in France, including *Attack on Titan* (57% more likely), and *My Hero Academia* (57%)

# The Big Anime Bet - Don't Just Check... Raise!

THE WALL STREET JOURNAL.

BUSINESS

## The World Is Watching More Anime—and Streaming Services Are Buying

Netflix has 16 projects in the works from its Tokyo-based team as the pandemic lifts demand

- Netflix saw the demand, and now has deals with many Anime producers in Japan, that they can put on their platform around the world.

# Global Demand has Increased...and Diversified

## Opportunities are greater than ever for both buyers and sellers

*"We grew up in different weather and maybe ate different food. But we have mothers and sisters and fathers, and we cry when someone passes away. We have the same stories, really. The archetypes are the same." -Ayelet Zurer, Israeli actress, star of Apple TV+'s Losing Alice*

- Netflix and other SVODs have demonstrated that programming can successfully travel- particularly to the US
- Audiences are now accustomed to sampling foreign content- SVODs have primed the pump
- Whether a local platform or studio, the SVODs have shown that buying or selling programs beyond your borders is good business





# THANK YOU

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