



From Region to Resonance:

MENA'S NEXT CREATIVE WAVE



DI DUBAI
CM INTERNATIONAL
CONTENT MARKET

Exploring the Global Entertainment Shift



The global entertainment landscape has been experiencing a dramatic surge in demand for not just non-English content, but original and/or new-to-screen programming.

In particular, the MENA landscape is seeing audiences expressing an increased appetite for Arabic & locally produced programming. There's especially a thirst for fresh original stories to complement long-running monolithic global franchises that have arguably become overly familiar.

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 these trends.

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.

A year later

Over the past few years, we've seen something **remarkable**, the steady, **unstoppable growth of Arabic content**.

Audiences across MENA are watching more local stories than ever before, and globally, the demand for Arabic titles is expanding beyond the diaspora.

The data tells us that Arabic isn't peaking, it's accelerating. What started as curiosity has **turned into sustained appetite**. And that means we're just getting started.

That's when we partnered with Parrot Analytics again this year to decode the data behind this movement.



The Hypothesis?

We wanted to understand not just what the language people are watching – but **what emotions are they seeking?**

After years of global uncertainty, audiences are gravitating towards **stories that make them feel good**.

Not necessarily comedies, but dramas & thrillers that leave you with hope, redemption, and a sense of emotional reward.

Is there a demand for feel-good content?



The Collaboration

Together, we set out to understand this emotional shift in storytelling — not just what audiences are watching, but why they're drawn to these narratives.

By combining industry insight **with Parrot's audience intelligence, we analysed millions of users** across global markets to uncover whether feel-good stories truly have momentum.

This wasn't just about validating a hypothesis – it was about revealing the reality of audience emotion and demand.



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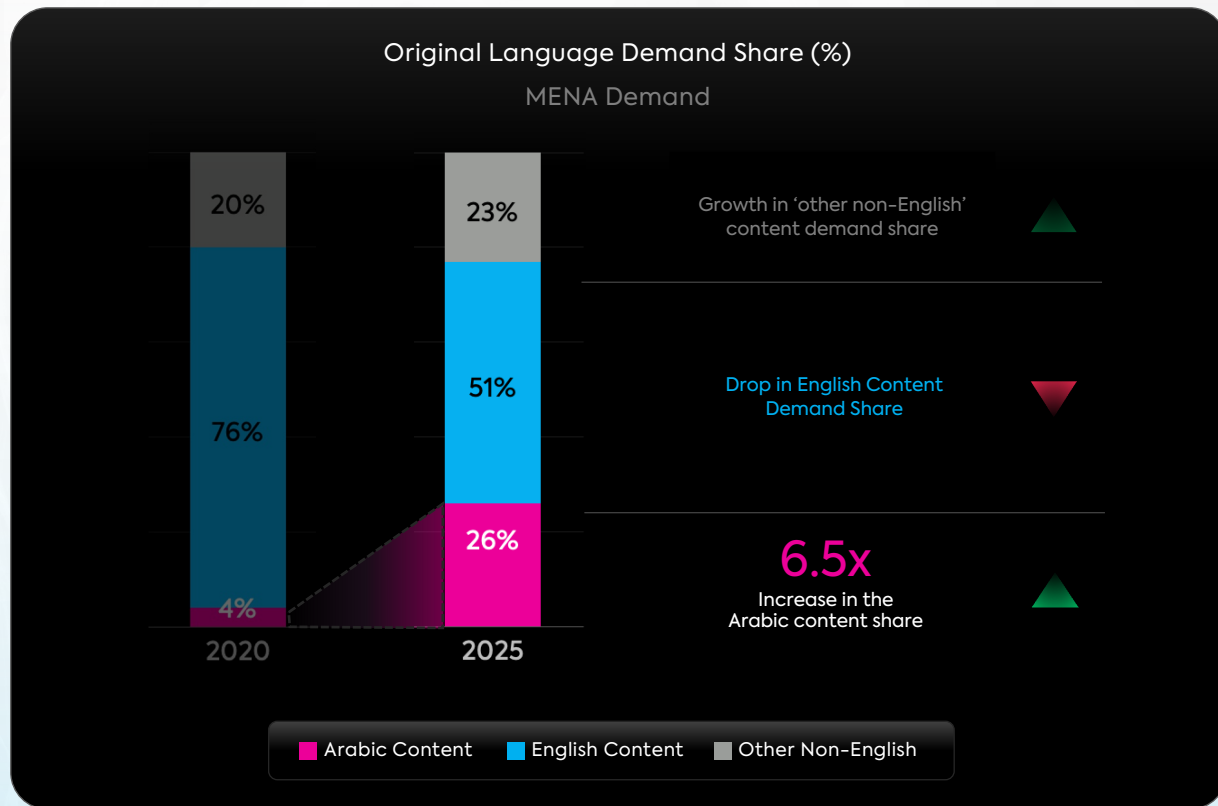


14 Theme and Mood Trends

Revisiting Regional Demand



Even more evident in the MENA Region...



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

Most notably, **Arabic content** now represents more than a quarter of all demand in MENA, a **6.5x increase since 2020**, showcasing that appetite for local storytelling isn't slowing down, it's accelerating.

This surge reflects wider shift, where audiences are embracing authentic, culturally grounded narratives.

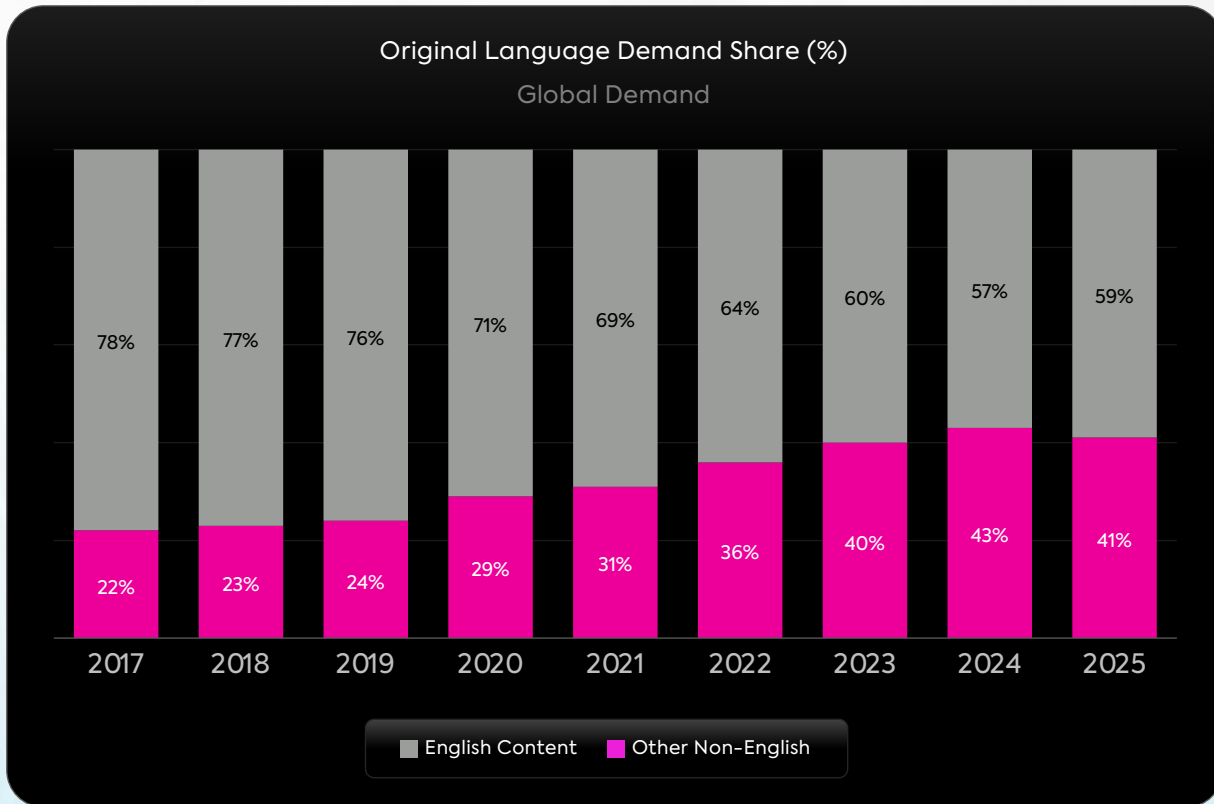
Hollywood is no longer the holy-grail of entertainment, the next wave is multilingual, diverse, and locally inspired

Growing Demand for Non-English Content

Revisited



Global demand for non-English has almost doubled since 2017

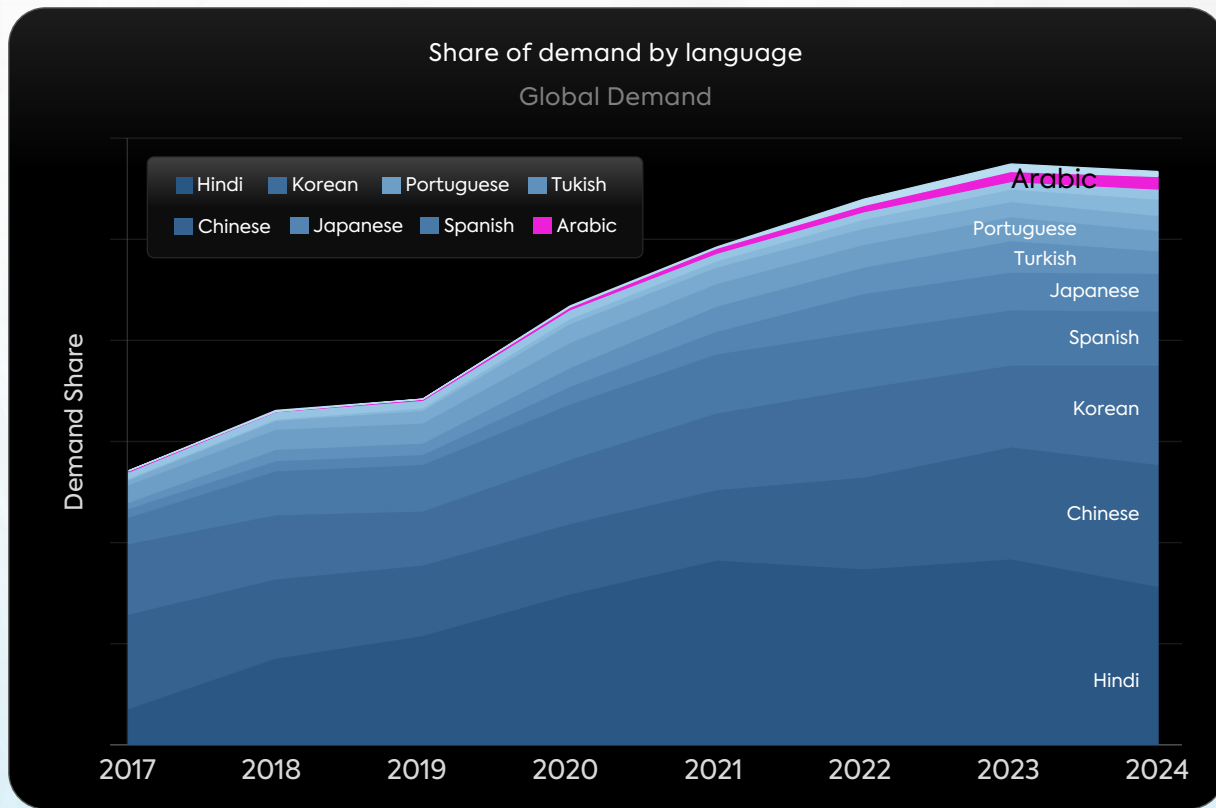


Globally, demand for non-English content has climbed from 22% in 2017 to 41% in 2025, *nearly doubling in less than a decade*.

Consistent record growth since 2017. A minor correction in 2025, but momentum remains strong as content supply scales and production, dubbing, and subtitling tools become increasingly accessible.

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

Zooming in on the Non-English scripted content trend



Excluding English, the languages driving the highest global demand are Hindi, Japanese, Korean, Spanish, and Turkish, with **Arabic is now emerging as a serious contender.**

Once seen as a primarily regional language, Arabic has steadily climbed into the global conversation, showing visible growth in international demand and closing the gap with long-established powerhouses like Turkish and Spanish content.

Globally resonant non-English titles are typically original productions, with non-native audiences especially drawn to innovative concepts delivered in familiar formats.

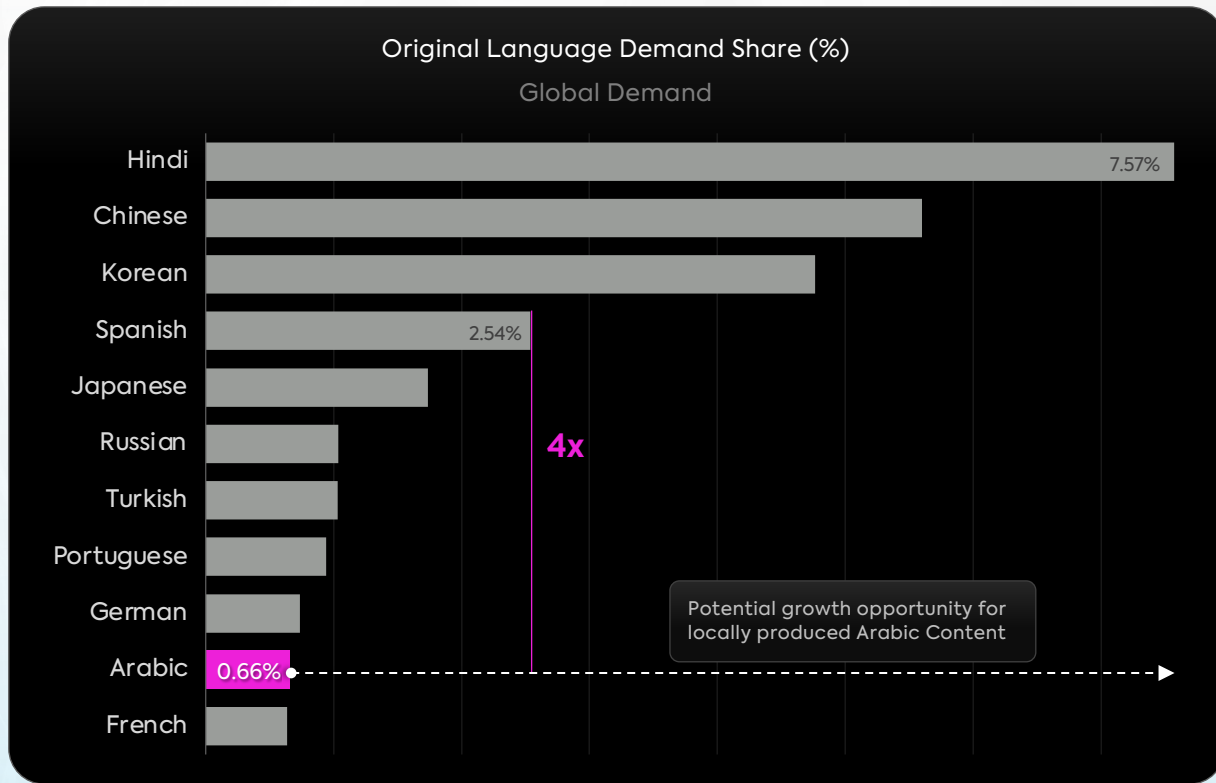
Arabic Content's Global Potential

A New Era of Opportunity



Tapping Into Arabic Content's Global Potential

Growth opportunities and expansion ahead

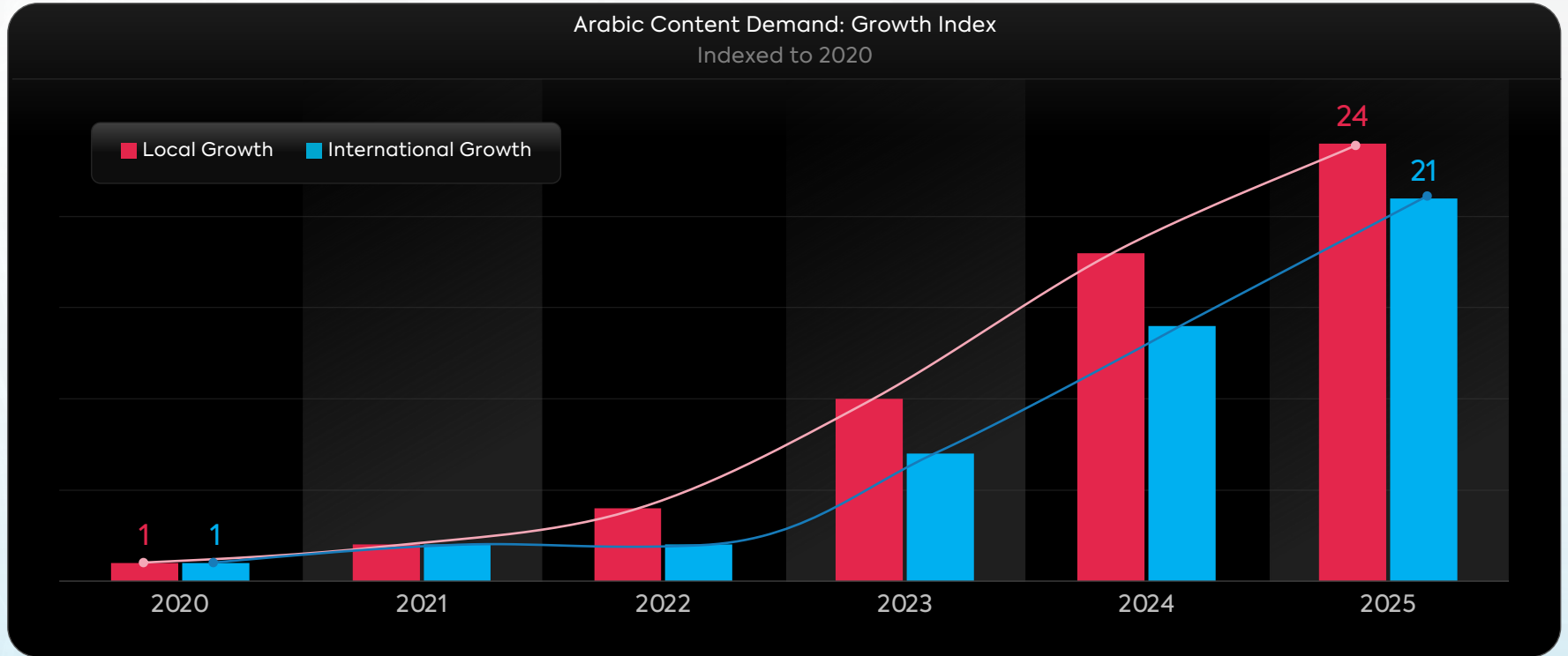


While Arabic content currently lags behind heavyweight Hindi and Chinese content in global growth potential, there is still ample opportunity for ascension, this gap signals a clear growth runway.

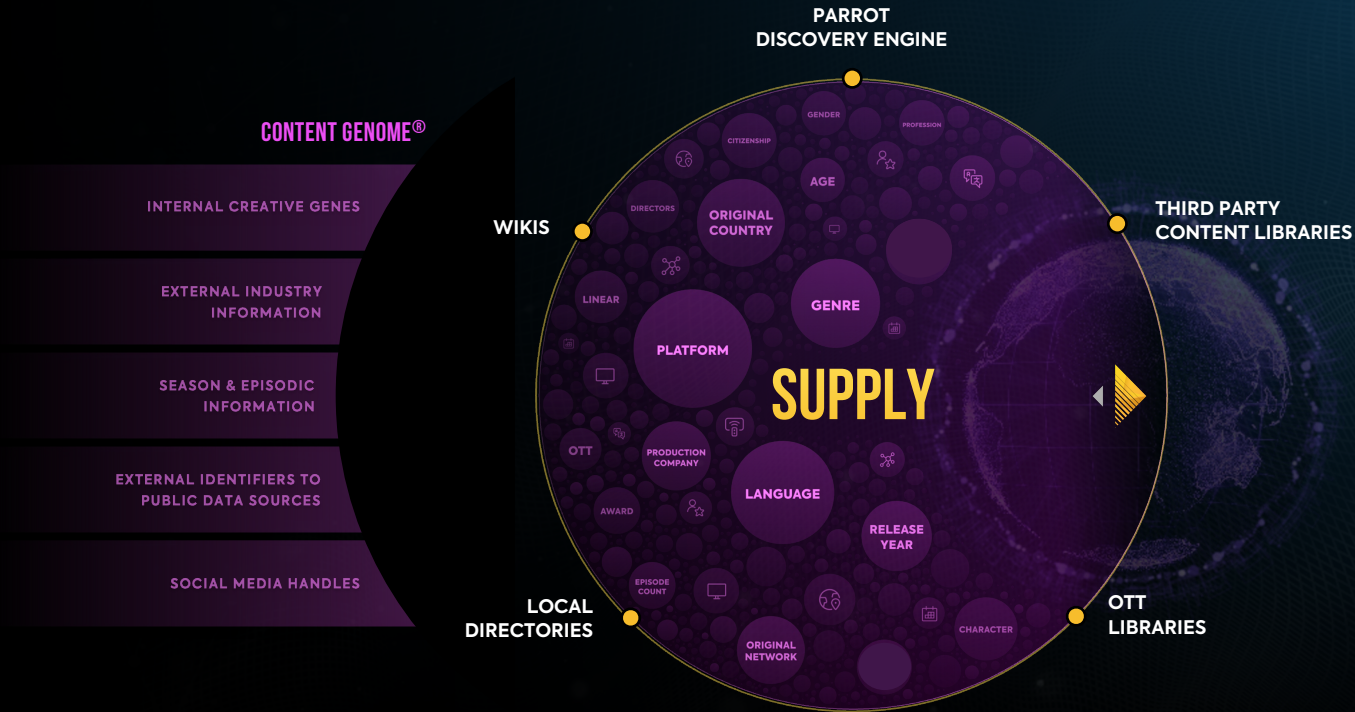
There is a meaningful ~4x headroom for Arabic storytelling to scale globally as quality, investment, talent, and new players continue to accelerate across the region.

In terms of worldwide resonance, international viewers have embraced Arabic crime dramas, thrillers, family series and reality competition series coming from the MENA region in 2025.

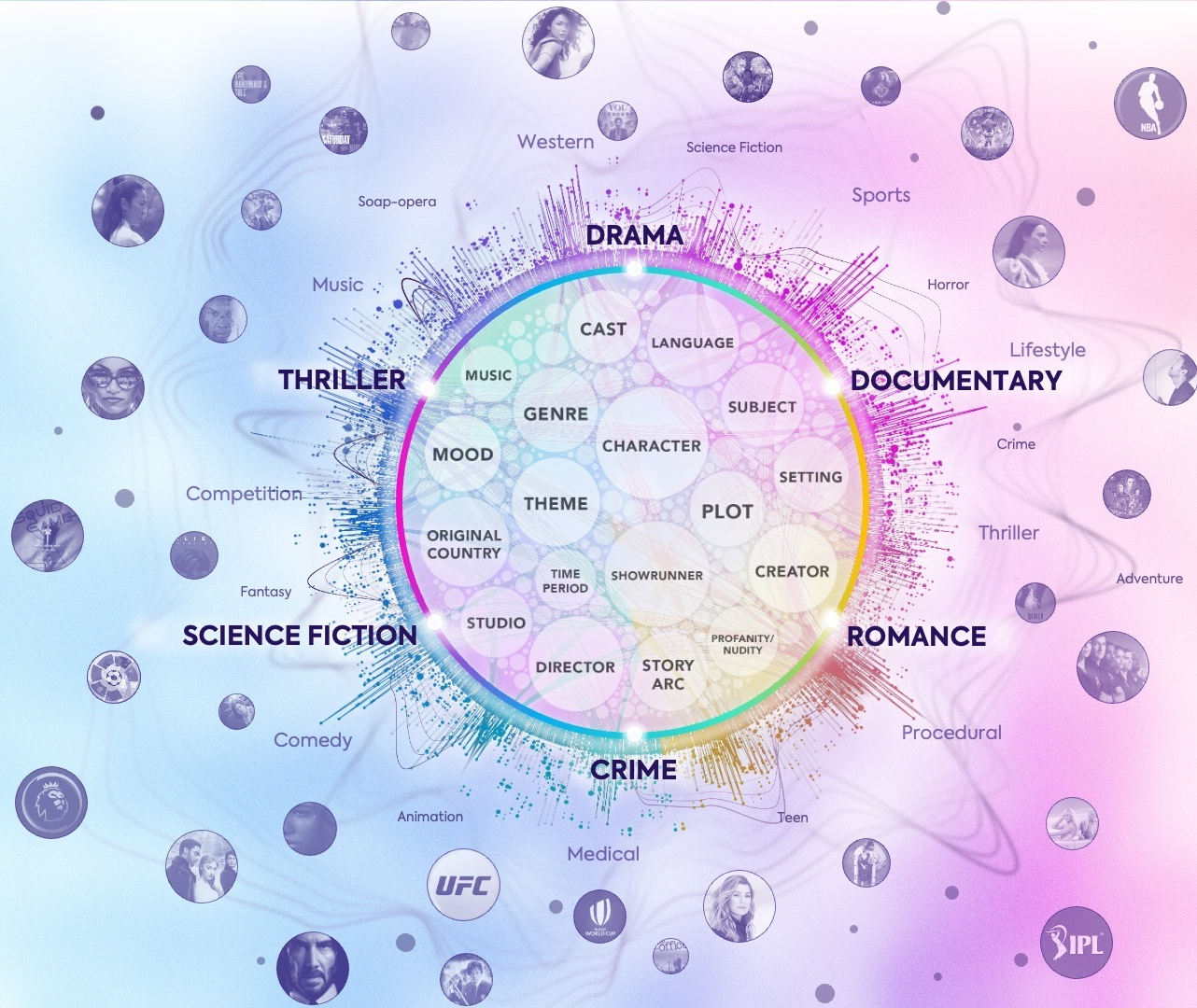
International demand for Arabic content is growing at a very similar rate to regional demand for Arabic content



We are currently tracking over 100m+ meta data tags...



100M+ metadata tags | 2K+ distribution platforms | 1M+ titles & 1M+ talent



Identifying the growing and consistent themes across the globe



Theme Deep Dives: Summaries, Keywords & Strategic Insights



Theme 1

Supernatural, suspenseful, and terror-driven content. Includes zombies, demons, paranormal investigations, haunted themes, and psychological horror narratives.

HORROR & DARK CONTENT

🔑 SAMPLE KEYWORDS (15 shown)

horror zombie demon supernatural paranormal
ghost haunted monster vampire werewolf
possession occult nightmare terror evil

Theme Deep Dives: Summaries, Keywords & Strategic Insights



Theme 2

Teen and adolescent stories focused on personal growth and identity. High school dramas, first love, puberty, and the transition from childhood to adulthood.

COMING OF AGE & YOUTH

🔑 SAMPLE KEYWORDS (12 shown)

coming of age teenage girl teenage boy teen drama
high school adolescent young protagonist growing up
first love puberty youth teen romance



Theme 3

Lighthearted entertainment focused on humor and laughter. Includes sitcoms, satire, parody, crude humor, and comedic storytelling across various formats.

COMEDY & HUMOR

🔑 SAMPLE KEYWORDS (13 shown)

comedy sitcom humor funny parody satire
farce crude humor slapstick mockumentary spoof
lighthearted comedic

Theme Deep Dives: Summaries, Keywords & Strategic Insights



Theme 4

Serious narratives exploring societal challenges and human conflict. Covers social justice, mental health, discrimination, inequality, and complex dramatic storytelling.

DRAMA & SOCIAL ISSUES

🔍 SAMPLE KEYWORDS (13 shown)

drama social issues mental health
discrimination racism abuse trauma addiction
inequality poverty activism protest



Theme 5

Hero-driven narratives featuring battles, powers, and adventure. Dominated by superhero franchises, vigilantes, costumed heroes, and action-packed storylines.

ACTION & SUPERHEROES

🔍 SAMPLE KEYWORDS (15 shown)

hero superhero superheroine villain battle powers
costumed hero batman marvel vigilante action
gotham fight combat adventure

Theme Deep Dives: Summaries, Keywords & Strategic Insights



Theme 6

Mystery and suspense-driven narratives. Detective stories, investigations, criminal cases, thrillers, and law enforcement focused content with tension and intrigue.

CRIME & THRILLER

🔑 SAMPLE KEYWORDS (15 shown)

crime detective police investigation murder
mystery thriller FBI forensics criminal spy
heist trial lawyer suspense



Theme 7

Stories centered on familial bonds and romantic relationships. Marriage, parenting, sibling dynamics, love stories, and the complexities of human connections.

FAMILY & RELATIONSHIPS

🔑 SAMPLE KEYWORDS (15 shown)

family mother father husband wife marriage
relationship romance love brother sister daughter
son grandmother couple

Theme Deep Dives: Summaries, Keywords & Strategic Insights

Theme 1

Stories of horror, suspense, and dark content, often exploring psychological complexities, societal issues, and disturbing scenarios.

HORROR & DARK CONTENT

17 items identified in 15 days

Nov 1, 2023 - Dec 31, 2023

100% | 100% | 100% | 100%

100% | 100% | 100% | 100%

Theme 2

Stories of action, adventure, and superheroes, often exploring themes of heroism, justice, and overcoming adversity.

ACTION & SUPERHEROES

17 items identified in 15 days

Nov 1, 2023 - Dec 31, 2023

100% | 100% | 100% | 100%

100% | 100% | 100% | 100%

Theme 8

Stories of hope, healing, and transformation. Redemptive narratives focusing on second chances, personal growth, courage, and overcoming adversity with positive, uplifting themes.

FEEL-GOOD & REDEMPTION

🔑 SAMPLE KEYWORDS (15 shown)

- redemption
- hope
- healing
- transformation
- courage
- spirituality
- journey
- resilience
- justice
- solidarity
- restoration
- perseverance
- wisdom
- triumph
- inspiration

Theme 4

Stories of drama and social issues, often exploring complex characters, societal challenges, and emotional journeys.

DRAMA & SOCIAL ISSUES

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Nov 1, 2023 - Dec 31, 2023

100% | 100% | 100% | 100%

100% | 100% | 100% | 100%

Theme Deep Dives: Summaries, Keywords & Strategic Insights

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 Hero-driven narratives featuring battles, powers, and adventure. Dominated by superhero franchises, vigilantes, costumed heroes, and action-packed storylines.

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SAMPLE KEYWORDS (15 shown)

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 Mystery and suspense-driven narratives. Detective stories, investigations, criminal cases, thrillers, and law enforcement focused content with tension and intrigue.

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 Stories centered on familial bonds and romantic relationships. Marriage, parenting, sibling dynamics, love stories, and the complexities of human connections.

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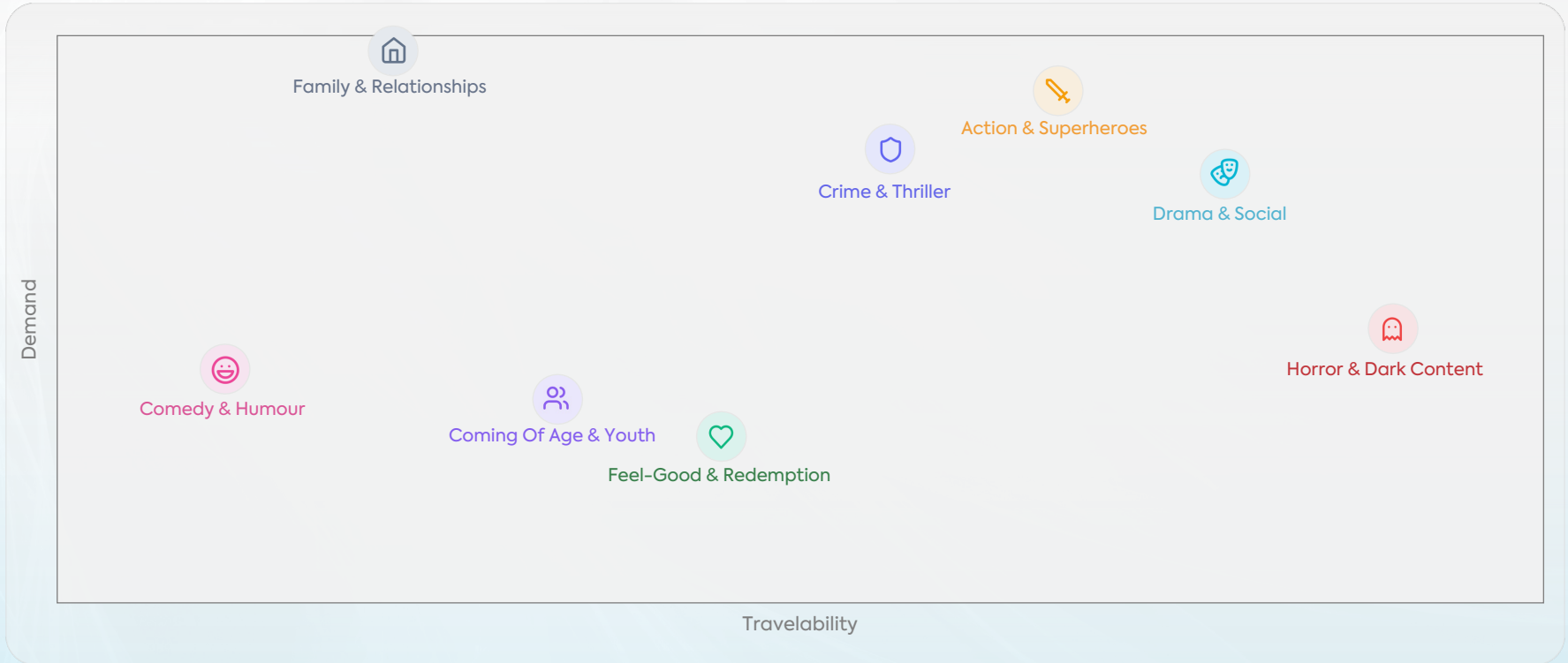
FEEL-GOOD & REDEMPTION

SAMPLE KEYWORDS (15 shown)

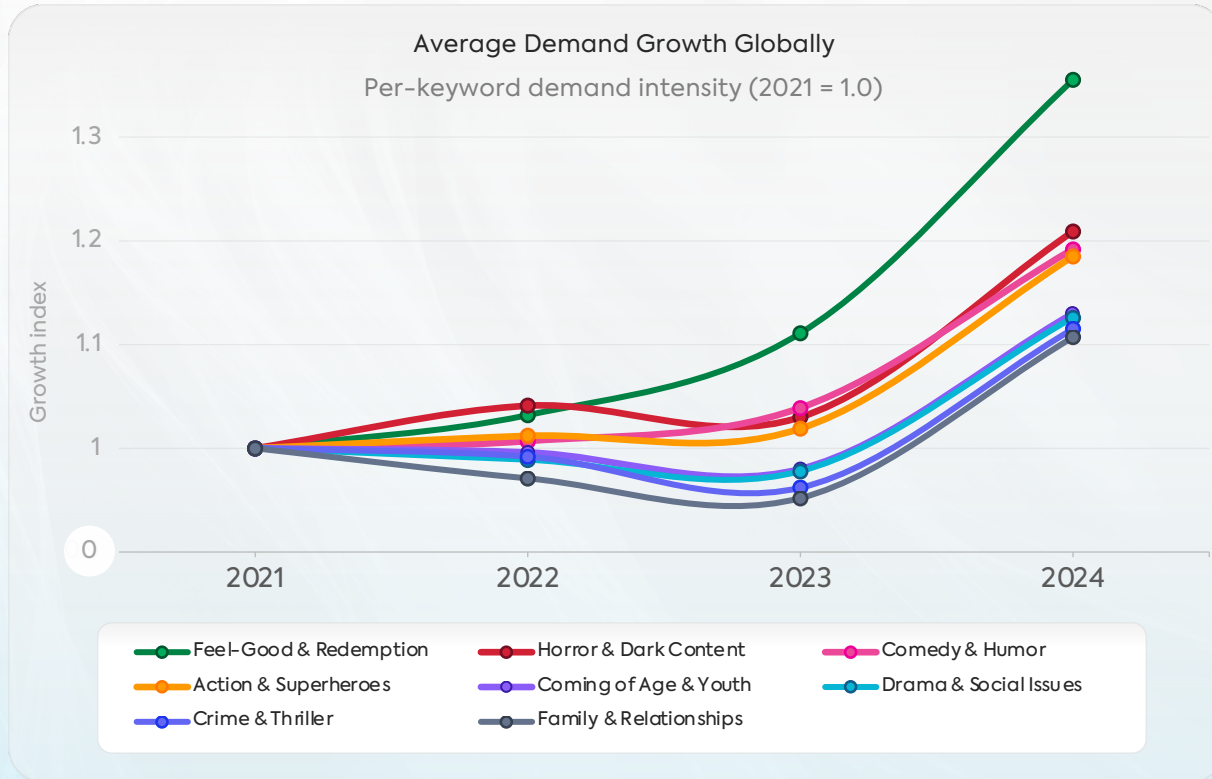
redemption hope healing transformation courage
 spirituality journey resilience justice solidarity
 restoration perseverance wisdom triumph inspiration

Theme & Mood Travelability

Feel-Good & Redemption stories are still building momentum but are now *breaking through as a distinct emotional genre*. They may not yet dominate global demand, but their ability to **travel across cultures** is strengthening. Signaling a shift toward **uplifting, redemptive narratives** that resonate universally.



Theme / Mood – Growth Indexed to the 2021



Since 2021, Feel-Good & Redemption stories have shown the strongest growth trajectory of all themes globally, outpacing action, comedy, and even horror.

This confirms that audience appetite for hope-driven storytelling is accelerating year over year, not replacing other genres, but redefining the emotional payoff people seek within them.

Unified Audience Trend

Audiences are gravitating toward hopeful, humorous and youth-driven storytelling

FEEL-GOOD
& REDEMPTION

+65%



COMEDY &
HUMOR

+70%



COMING OF
AGE & YOUTH

+73%

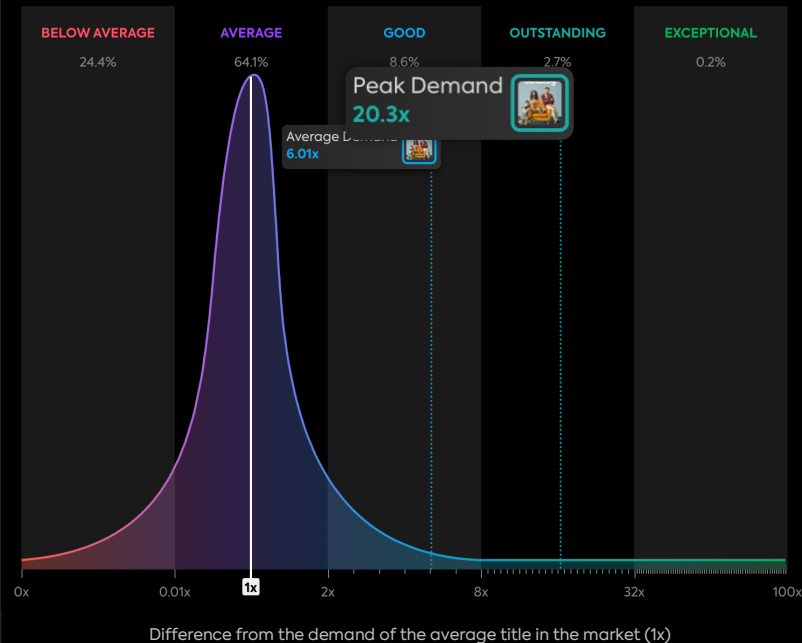
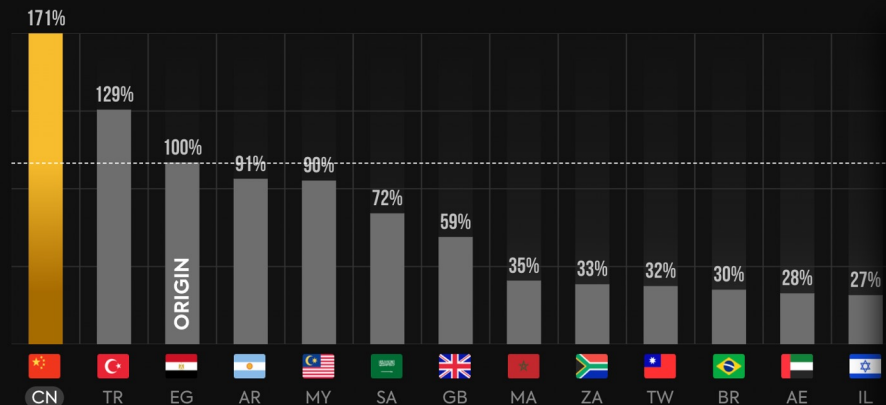


Catalog (كتالوج)

171%

Travelability to China

Market Travelability for Catalog (كتالوج) to China in the Last 30 Days is 171%, which means that the demand for Catalog (كتالوج) is 171% of the demand in its country of origin, Egypt.

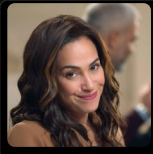


Finding Ola (البحث عن علا)

139%

Travelability to UAE

Market Travelability for Finding Ola (البحث عن علا) to United Arab Emirates in the Last 30 Days is 139%, which means that the demand for Finding Ola (البحث عن علا) is 139% of the demand in its country of origin, Egypt.



Peak Domestic Rank

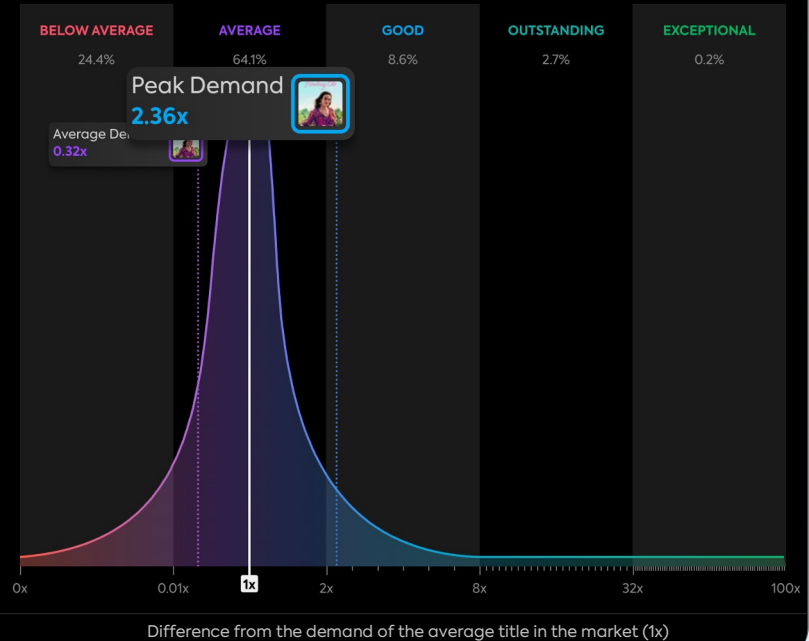
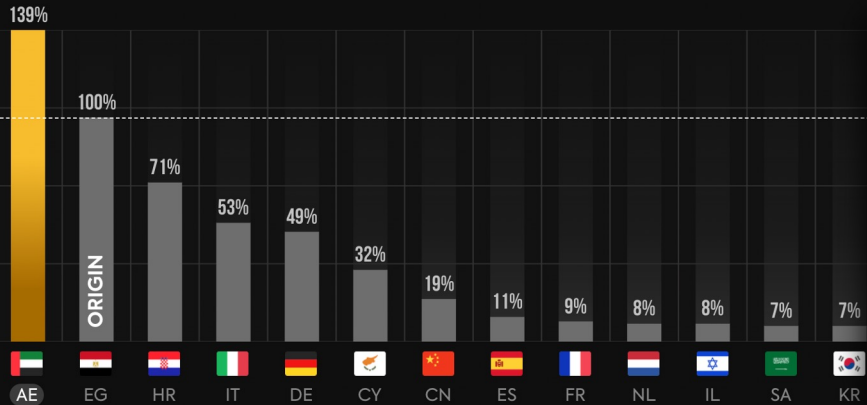
ALL-TIME #21
THIS YEAR (2025) #120
LAST 7 DAYS #344

ALL-TIME - BY NUMBER OF SEASONS #21 (2 SEASONS)

Peak Global Rank

ALL-TIME #3461
THIS YEAR (2025) #5270
LAST 7 DAYS #19084

ALL-TIME - BY NUMBER OF SEASONS #3461 (2 SEASONS)



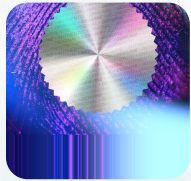
Unlocking the future of Arabic content

The future of Arabic content lies in maintaining cultural authenticity while leveraging universal themes to expand reach. Embracing these trends, the industry can achieve its full potential on the world stage.



Evolve, Don't Imitate

Inspiration can come from anywhere, **but impact comes from originality**. We can learn from global success, even adapting their stories, but making sure its through the lens of regional relevance and cultural nuance.



Authenticity will drive global appeal:

Our greatest strength lies in telling our truth. Audiences everywhere are drawn to stories that reflect real experiences, cultural depth, and emotional honesty. The **more local we are, the more universal we become**.



Lead with Emotion

What truly travels isn't format or language, **it's feeling**. Stories that make audiences laugh, cry, or hope linger longer and reach further. Emotion is the universal export.



Keeping in mind universal themes

Hope, belonging, identity, and redemption, these are emotions that cross every border. When we weave them through Arabic narratives our stories can resonate as deeply in MENA as they could globally.



Staying close to the data

Data isn't just numbers; it's the **voice of the audience**. Understanding demand signals helps us make the creative decisions with intention, shaping stories that connect rather than just compete.

APPENDIX





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.



Methodology



What is Demand? Quick Recap

