Local Voices, Global Impact:

The Value of Original Content Creation

NOVEMBER 2024

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.

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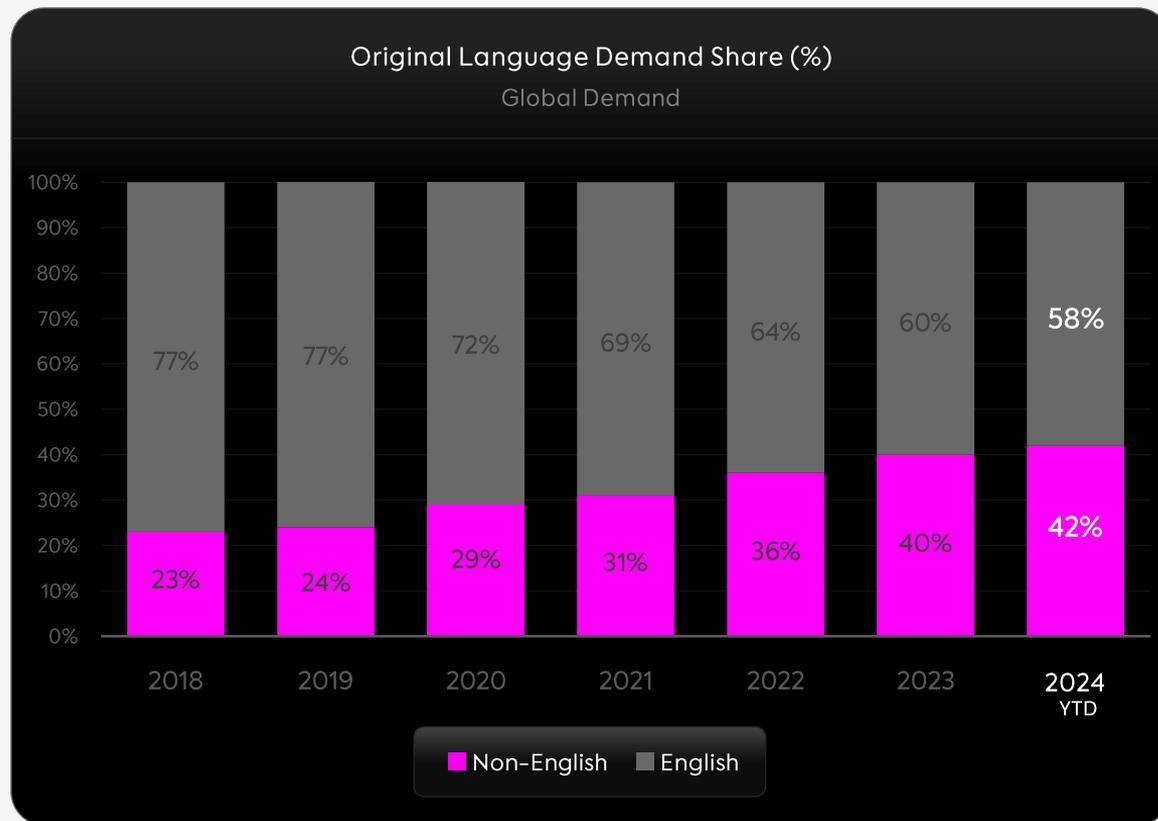# Growing Demand for Non-English Content

Revisited

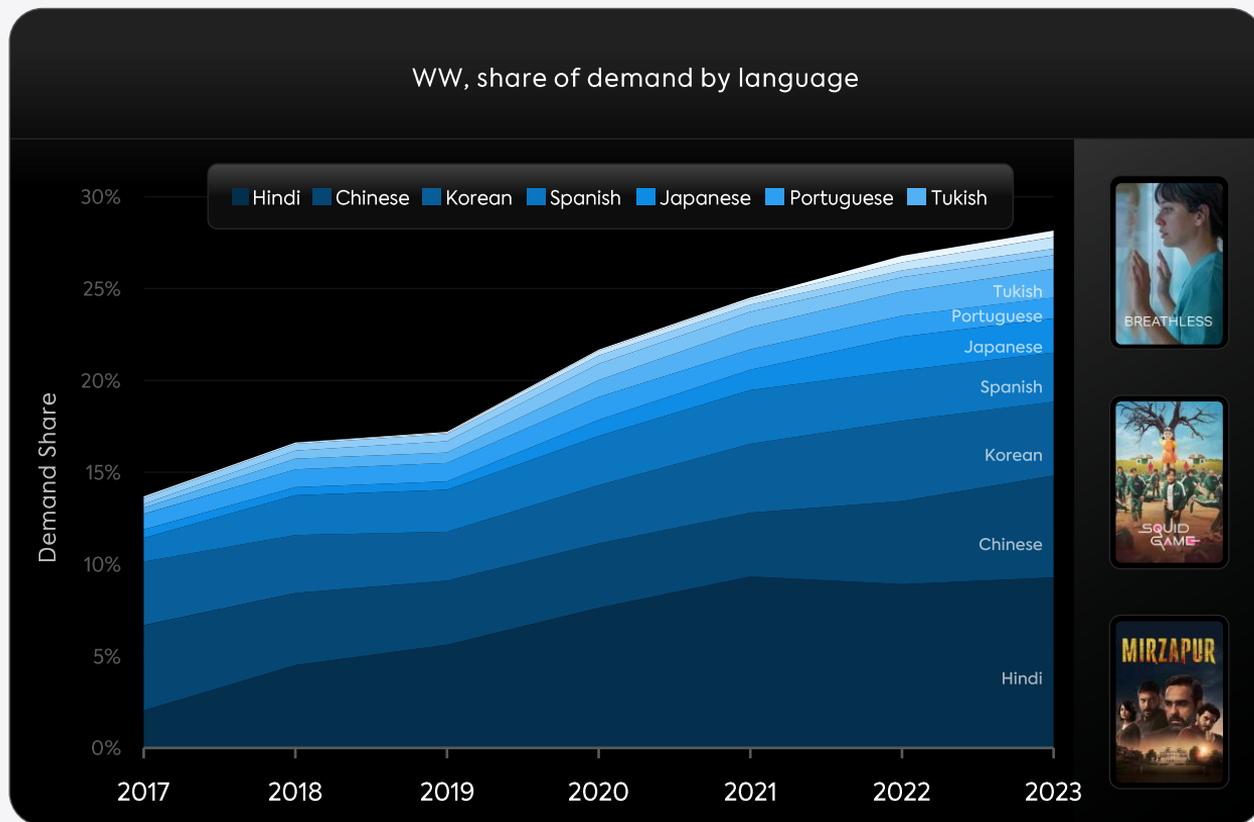# Global demand for non-English content continues to rise...

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 leapt 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.

Original Language Demand Share (%)
Global Demand

Year	Non-English	English
2018	23%	77%
2019	24%	77%
2020	29%	72%
2021	31%	69%
2022	36%	64%
2023	40%	60%
2024 YTD	42%	58%

Legend: ■ Non-English ■ English

Zooming in on the Non-English scripted content trend

WW, share of demand by language

Legend: Hindi, Chinese, Korean, Spanish, Japanese, Portuguese, Tukish

Chart: Demand Share (y-axis, 0% to 30%) vs Years (x-axis, 2017 to 2023)

Stacked areas labeled: Tukish, Portuguese, Japanese, Spanish, Korean, Chinese, Hindi

BREATHLESS

SQUID GAME

MIRZAPUR

Excluding English, the content languages driving the highest global demand are Hindi, Japanese, Korean, Spanish, and Turkish.

South Korea and India now account for 80% of all media spending in Asia (Bloomberg). As India grows as a media hub, it is set to overtake South Korea as Asia's largest media market.

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

rise studios   PARROT ANALYTICS

From Seoul to the World

K-Drama Goes Global

Squid Game: The Catalyst for Korean Drama Growth

Korean Content Supply Trend
2015–2023

Supply Index / Release Year — values: 2015, 2016, 2017, 2018, 2019, 2020, 2021, 2022, 2023

All it takes is one local language hit to spur newfound interest in a given region.

The volume of South Korean programming has exploded since *Squid Game* raised the ceiling of global success for non–English content.
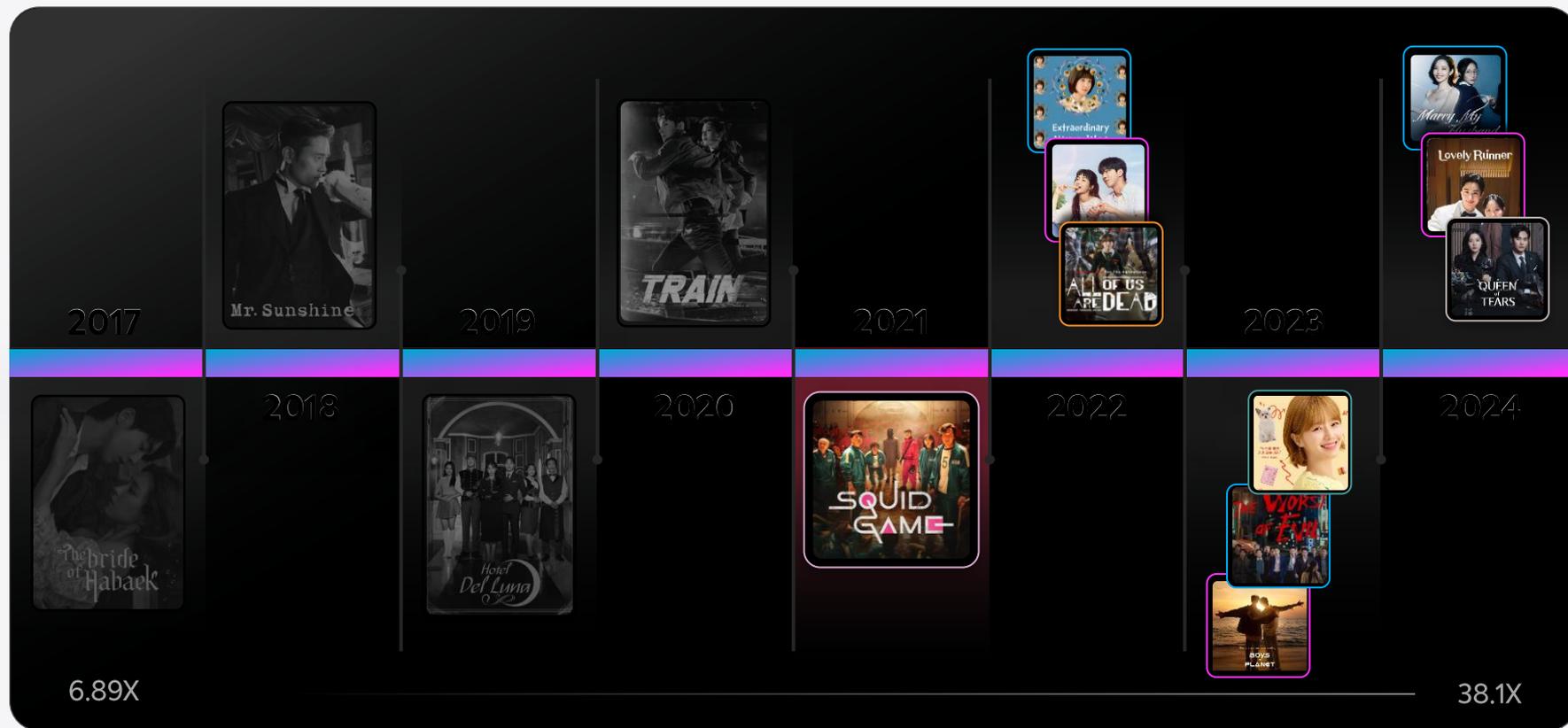
Over 60% of Netflix subscribers have consumed Korean content, per the company (2023). Other platforms are now following the trend.

In May 2023, Apple signed a deal for Korean start–up Kenaz to supply web comics for its Books app, creating a new pipeline of fresh IP for potential on–screen adaptations

Earlier this year, CJ ENM noted that its Korean content success had led to Prime Video "attempting to increase the share of K–content."

Top Korean In-Demand Releases Shaping Global Entertainment

2017

Mr. Sunshine

2019

TRAIN

2021

Extraordinary

ALL OF US ARE DEAD

2023

Marry My

Lovely Runner

QUEEN of TEARS

2018

Hotel Del Luna

2020

SQUID GAME

2022

The WORST of EVIL

BOYS PLANET

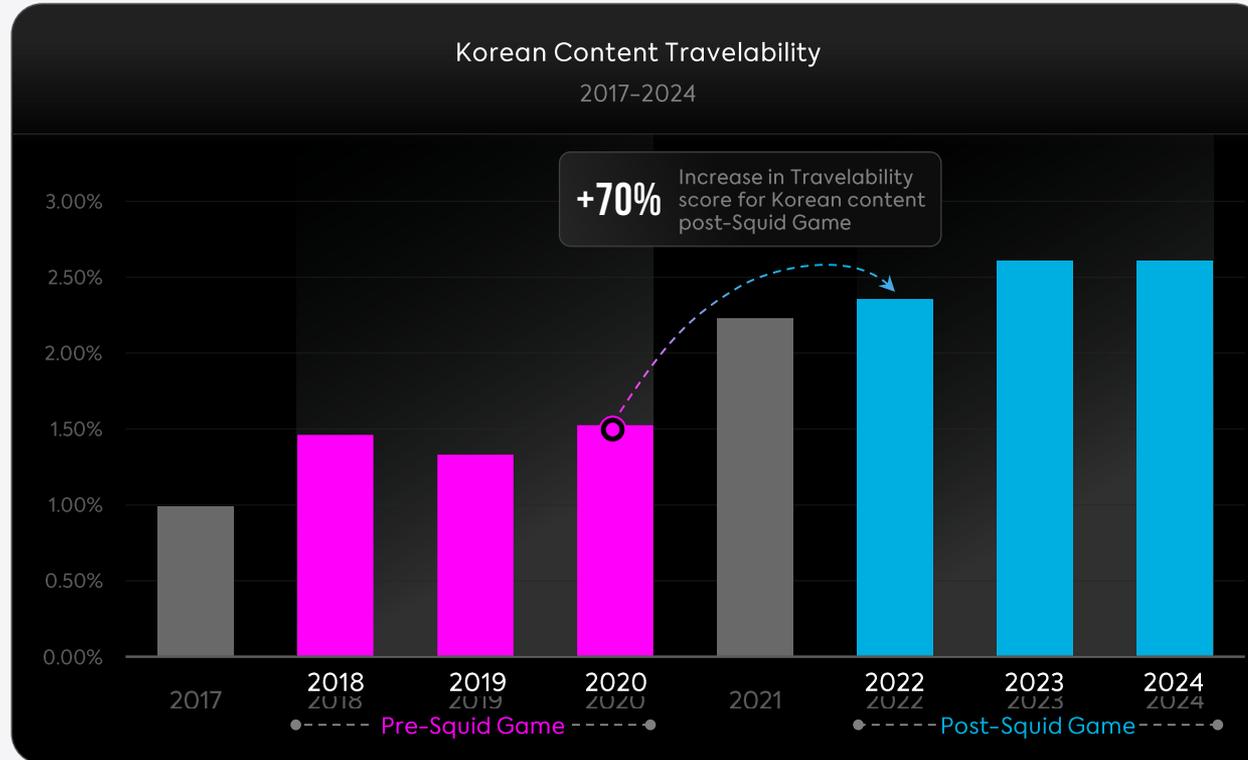2024

The bride of Habaek

6.89X

38.1X

Korean Content's Global Surge:
A 70% Boost in Travelability Post–Squid Game

Most K-Dramas historically only run one season, which may align with Gen Z's preference for shorter–form content.

Korean Content Travelability
2017–2024

+70% Increase in Travelability score for Korean content post-Squid Game

3.00%	
2.50%	
2.00%	
1.50%	
1.00%	
0.50%	
0.00%	

2017 2018 2019 2020 2021 2022 2023 2024

● - - - - - Pre–Squid Game - - - - - ●   ● - - - - Post–Squid Game - - - - ●

Audiences with a growing appetite for original storytelling, engaging plots, and compelling characters are increasingly sampling South Korean programming.

Over the past three years, Gen Z has played a significant role in propelling titles like *Lovely Runner*, *The 8 Show*, *All Of Us Are Dead*, and *Queen of Tears* alongside *Squid Game* as the top five Korean originals with the highest global travelability.
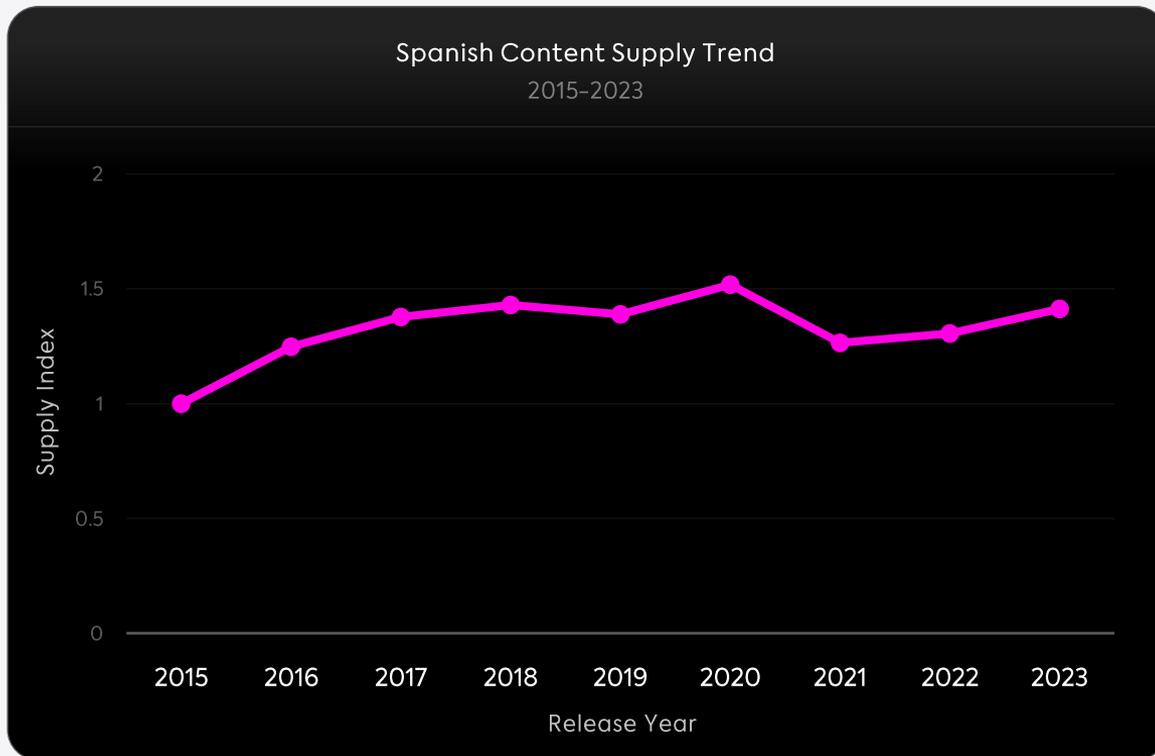
Spanish Content

The Secret to Streaming Success

RISE STUDIOS EXPLORATION: MENA'S NEW ENTERTAINMENT WAVE

Steady Supply: Spanish-Language Content Continues to Anchor Global Platforms Post-Pandemic

Spanish Content Supply Trend
2015-2023

English is not the only globally exportable content language

The supply of Spanish language original programming is steadily recovering from production shutdowns and logjams, presenting an opportunity to program for a truly global viewer base.

Specifically, there are 21 countries that list Spanish as its native language. After Mandarin, Spanish is the world's second most spoken native language.

Major media markets such as Europe, North America and South America boast large populations of Spanish speakers. The language is a necessary content building block for any platforms with global aspirations.

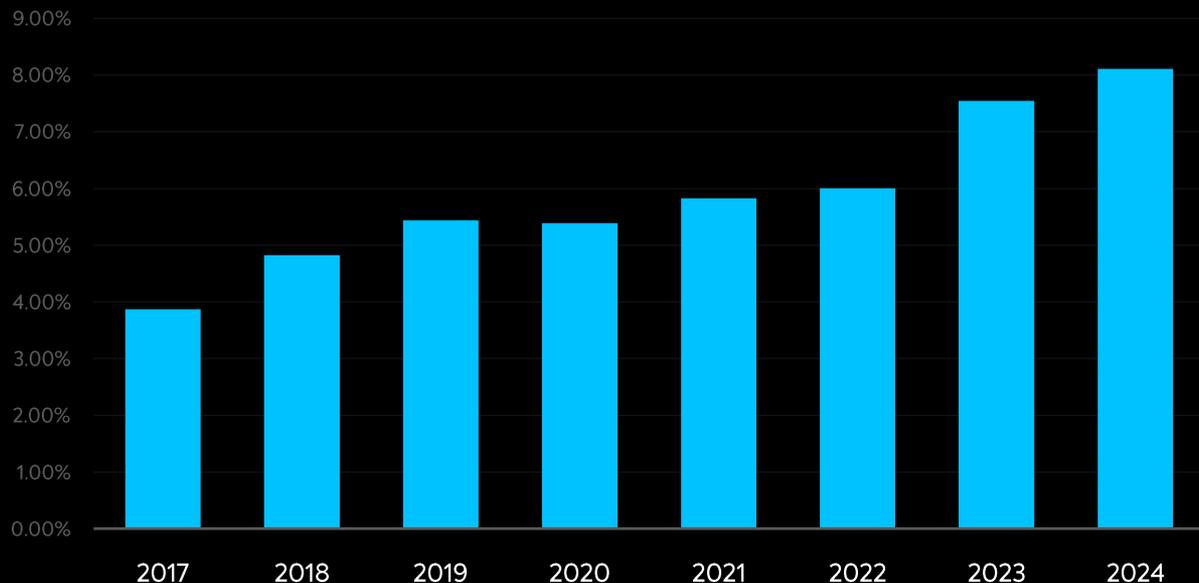# La Casa de Papel: The Spark That Ignited Spain's Content Revolution

Accelerating Abroad:
Spanish Content's Climbing Global Popularity

Scripted and unscripted Spanish language content is highly sought after

Spanish–language shows make up only 5% of Netflix's top 18,000 titles but accounts for more than 8% of viewing time (Netflix Engagement Reports).

Netflix sees the opportunity as it spent more than $200 million on Mexican programming in 2021 and "invested significantly" in Spain (LA Times).

Recognizing the upside, media companies such as TelevisaUnivision, Canela Media, NBCU's Telemundo and Peacock, ESPN+ and Amazon Prime Video have been acquiring Spanish–language sports content in recent years.
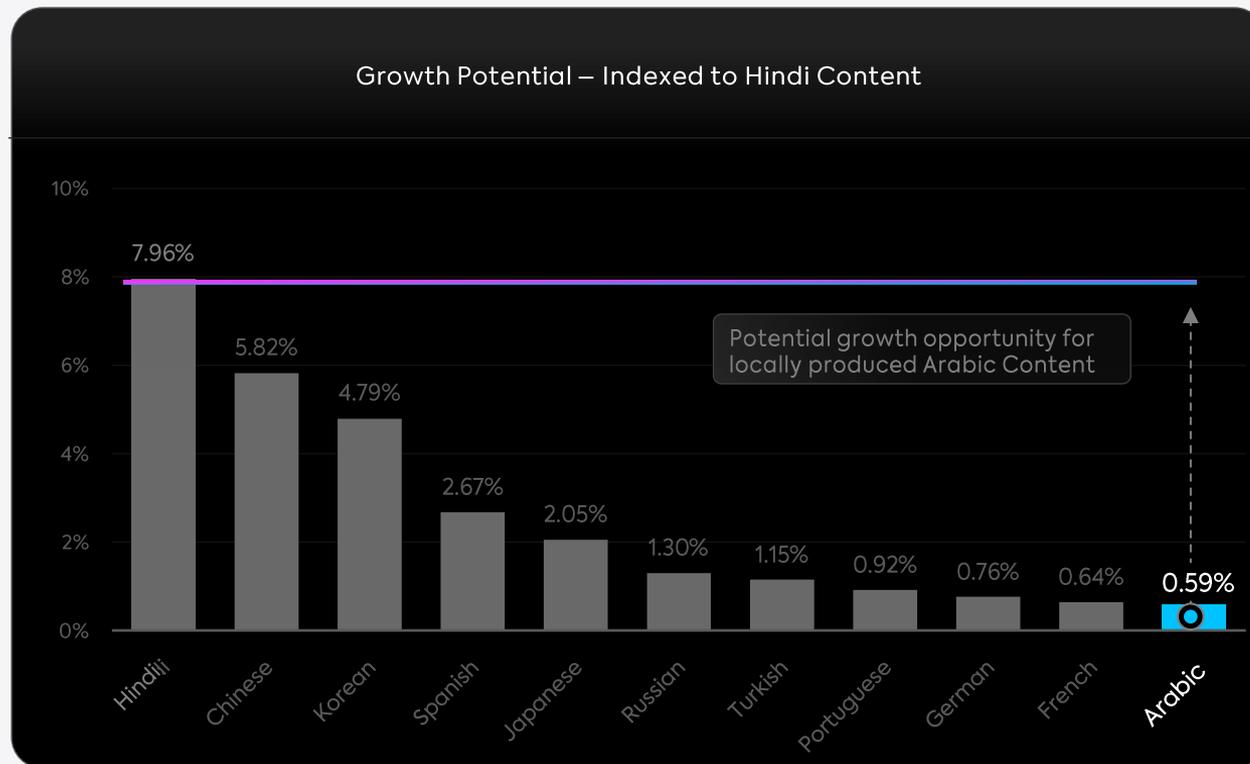
Yearly Travelability Of Spanish Content
2017 - 2024

Arabic Content's Global Potential

A New Era of Opportunity

Tapping Into Arabic Content's Global Potential
Growth opportunities and expansion ahead

Growth Potential — Indexed to Hindi Content

- Hindiii: 7.96%
- Chinese: 5.82%
- Korean: 4.79%
- Spanish: 2.67%
- Japanese: 2.05%
- Russian: 1.30%
- Turkish: 1.15%
- Portuguese: 0.92%
- German: 0.76%
- French: 0.64%
- Arabic: 0.59%

Potential growth opportunity for locally produced Arabic Content

While Arabic content currently lags behind heavyweight Hindi and Chinese content in global growth potential, there is still ample opportunity for ascension.

Platforms that are investing heavily in global content strategies, particularly in the MENA region, stand to benefit from an increase in locally-produced Arabic scripted content that appeals to global audiences.

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 2024.
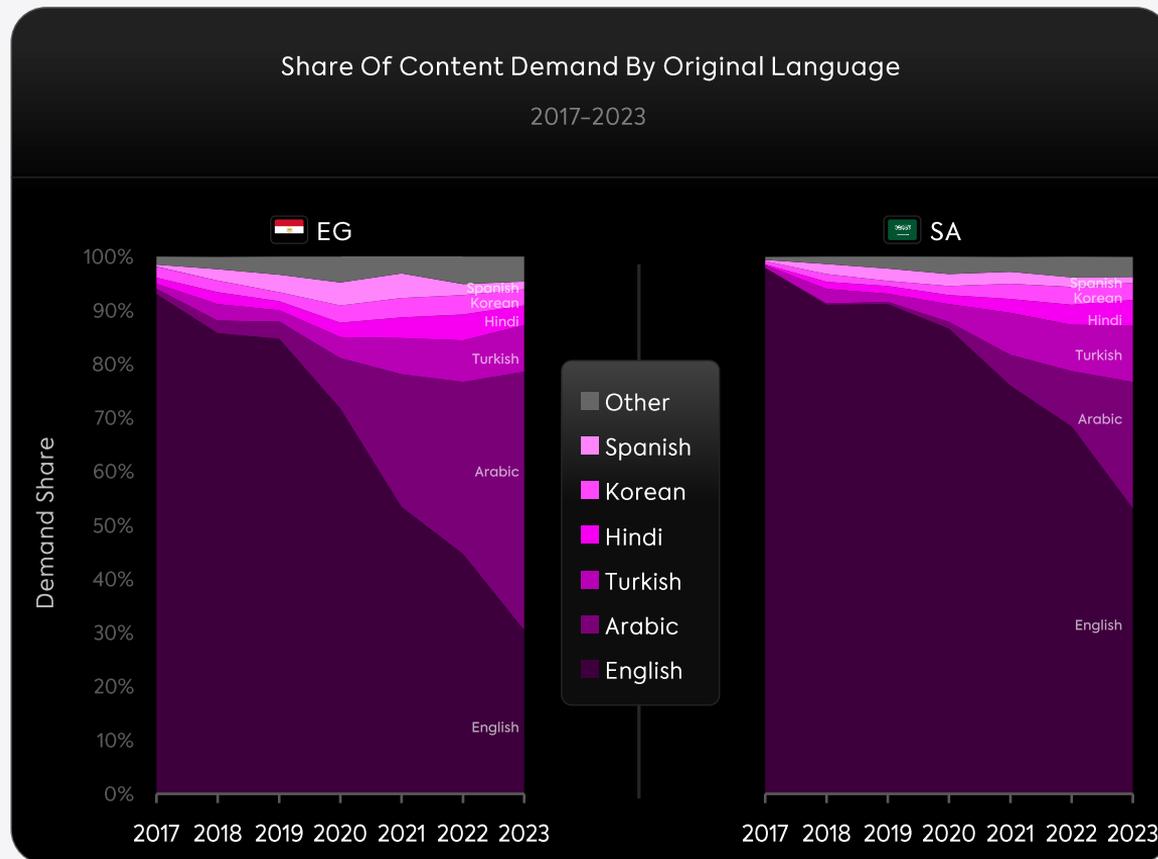
Arabic Content Grows to Meet Increasing Local Demand

Arabic-language content has solidified its dominance in both Egypt and Saudi Arabia, with local demand continuing to rise, particularly since 2020.

The declining demand for international content, like English and Turkish productions, reflects the region's shift towards culturally resonant, locally-produced series and films.

Content ecosystems in Egypt and Saudi Arabia have thrived with the surge in Arabic-language content, now commanding a significant share of total demand.

As platforms expand, the trend toward local Arabic content has become a critical growth strategy, with both regional and global players increasingly investing in original Arabic programming.

Share Of Content Demand By Original Language

2017–2023

EG — Demand Share chart (2017–2023): Spanish, Korean, Hindi, Turkish, Arabic, English

SA — chart (2017–2023): Spanish, Korean, Hindi, Turkish, Arabic, English

Legend:
- Other
- Spanish
- Korean
- Hindi
- Turkish
- Arabic
- English

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

Arabic Content Demand: Growth Index

Indexed to 2020

Arabic content is primed for its *"Squid Game"* moment, with the potential for a breakout hit that resonates beyond regional borders.

2020 — Local: 1, International: 1

2021

2022

2023

2024 — Local: 16.71, International: 13.14

■ Local Growth ■ International Growth

rise   PARROT ANALYTICS

Top demanding markets for Arabic content, outside of MENA

#10 🇨🇦 Canada

#4 🇬🇧 United Kingdom

#7 🇩🇪 Germany

#1 🇺🇸 United States

#5 🇹🇷 Turkey

#3 🇫🇷 France

#6 🇵🇰 Pakistan

#2 🇮🇳 India

#9 🇳🇬 Nigeria

#8 🇵🇭 Philippines
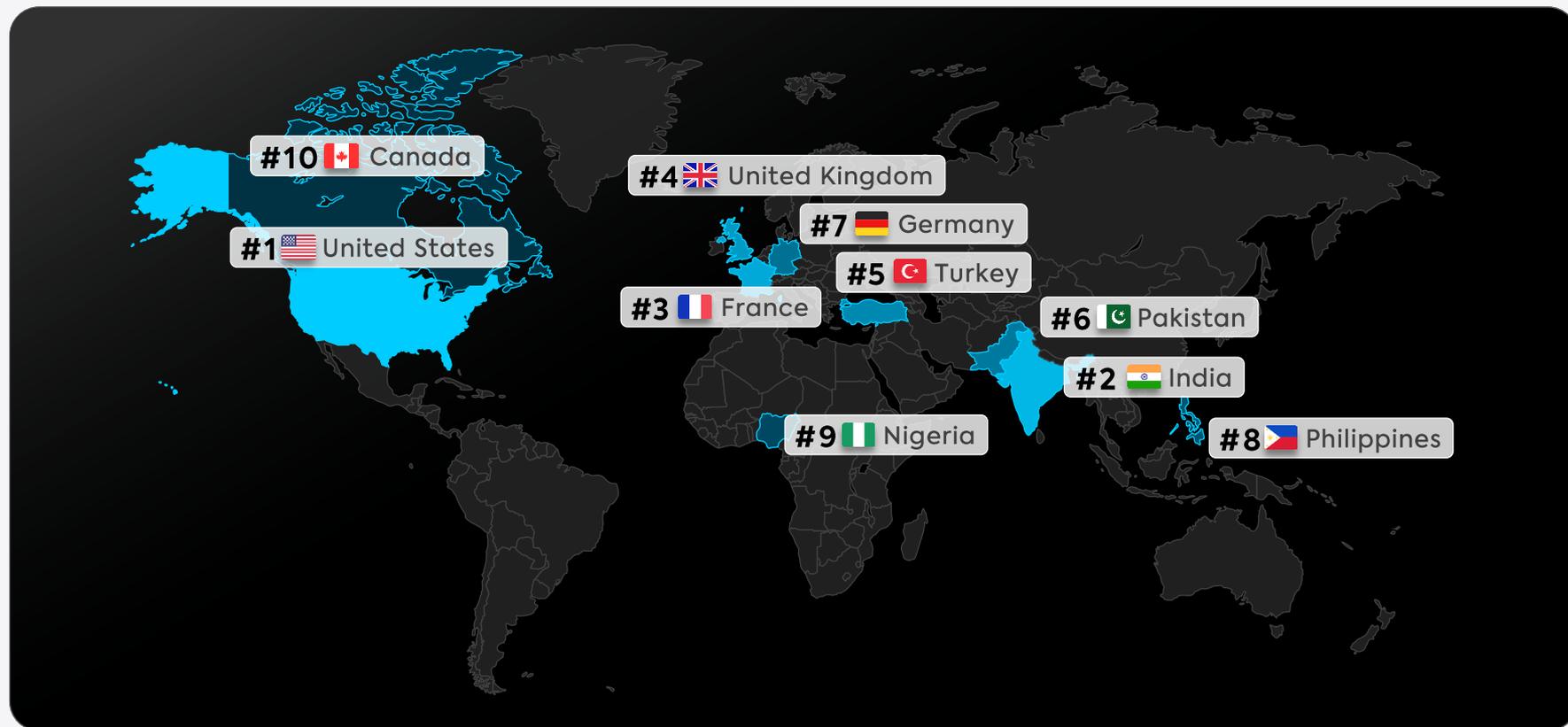
Arabic Titles Making Waves on the International Stage

AlRawabi School For Girls
(مدرسة الروابي للبنات)

1.6x
More demand
France vs. Jordan
OUTSTANDING

Al Hayba
(الهيبة)

53%
Travelability
To US

Jinn
(جن)

84%
Travelability
To India
OUTSTANDING

Crashing Eid
(جايبة العيد)

Global Appeal
Outside of MENA

Head To Head
(راس براس)

Top 10 Non-English on Netflix
Globally

The Giza Killer
(سفاح الجيزة)

1.5x
More demand
Germany vs. Egypt

RISE STUDIOS EXPLORATION: MENA'S NEW ENTERTAINMENT WAVE

AlRawabi School For Girls (مدرسة الروابي للبنات)

161%
Travelability to France

In the last 30 days, demand in France for *AlRawabi School for Girls* has reached 1.6 times the level observed in its home market, Jordan. *AlRawabi School for Girls* hit an all-time global demand peak at 8.96x the average, ranking it among the top 3% of titles globally.

🇯🇴 **Peak Domestic Rank**

ALL-TIME
#1

🌐 **Peak Global Rank**

ALL-TIME
#762

BELOW AVERAGE	AVERAGE	GOOD	OUTSTANDING	EXCEPTIONAL
24.4%	64.1%	8.6%	2.7%	0.2%

Peak Demand
8.96x

Average Demand
0.87x

0x — 0.01x — 1x — 2x — 8x — 32x — 100x

Difference from the demand of the average title in the market (1x)

161% FR
100% JO ORIGIN
65% EG
56% SA
55% CA
35% US
30% LB
27% NL
26% KR
25% IQ
25% IT
22% OM

rise
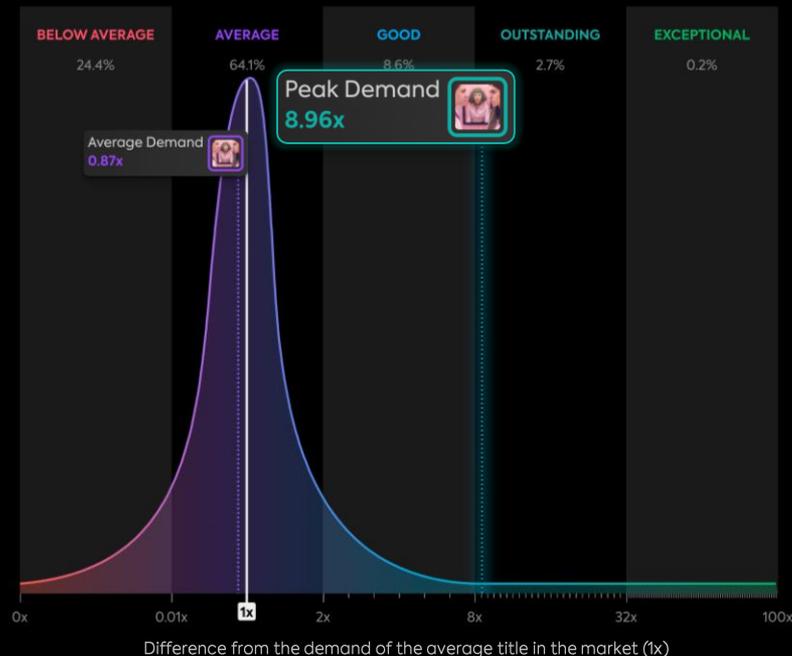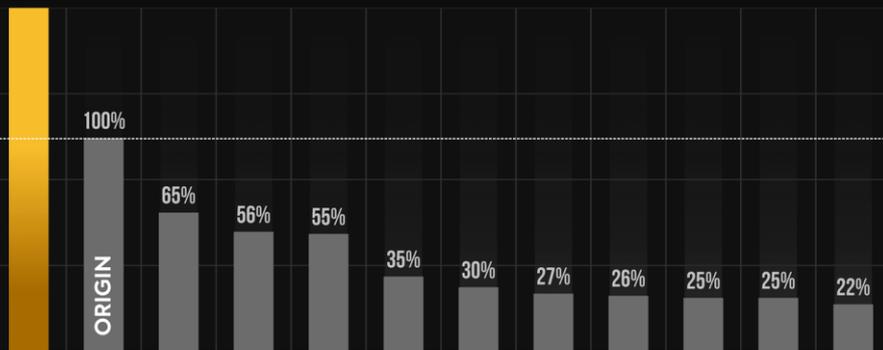PARROT ANALYTICS

Al Hayba (الهيبة)

53%
Travelability to United States

Over the past 30 days, the **US** has shown the highest demand for *Al Hayba* outside its home market of Lebanon.

🇱🇧 **Peak Domestic Rank**

ALL-TIME
#8

🌐 **Peak Global Rank**

ALL-TIME
#1220

100%

53% (US)
46% (IQ)
44% (EG)
39% (JO)
37% (MA)
34% (DZ)
32% (SA)
27% (IN)
18% (TN)
18% (PK)
16% (NG)

ORIGIN (LB)

| LB | US | IQ | EG | JO | MA | DZ | SA | IN | TN | PK | NG |

BELOW AVERAGE	AVERAGE	GOOD	OUTSTANDING	EXCEPTIONAL
24.4%	64.1%	8.6%	2.7%	0.2%

Peak Demand
3.53x

Average Demand
0.79x

0x   0.01x   1x   2x   8x   32x   100x

Difference from the demand of the average title in the market (1x)

rise
PARROT ANALYTICS
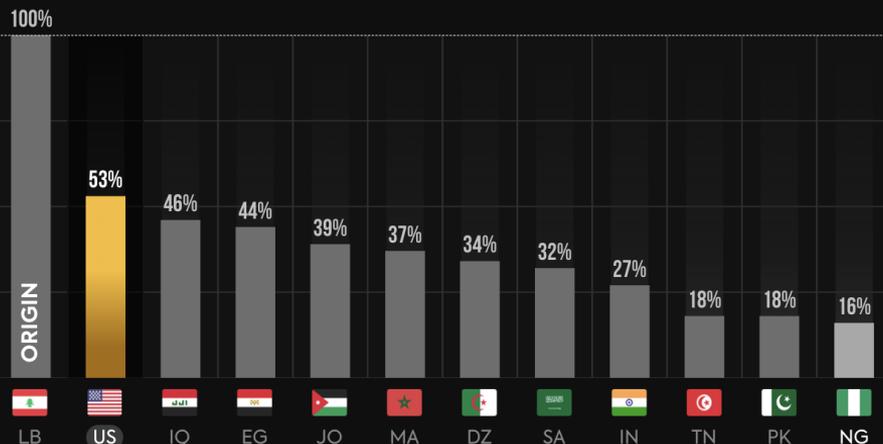
Jinn (جن)

84%
Travelability to India

During its first 30 days, *Jinn* captured 84% of the demand in India compared to its home market, Jordan. *Jinn* achieved an all-time peak global demand of 8.86x the average, placing it in the top 3% of all titles.
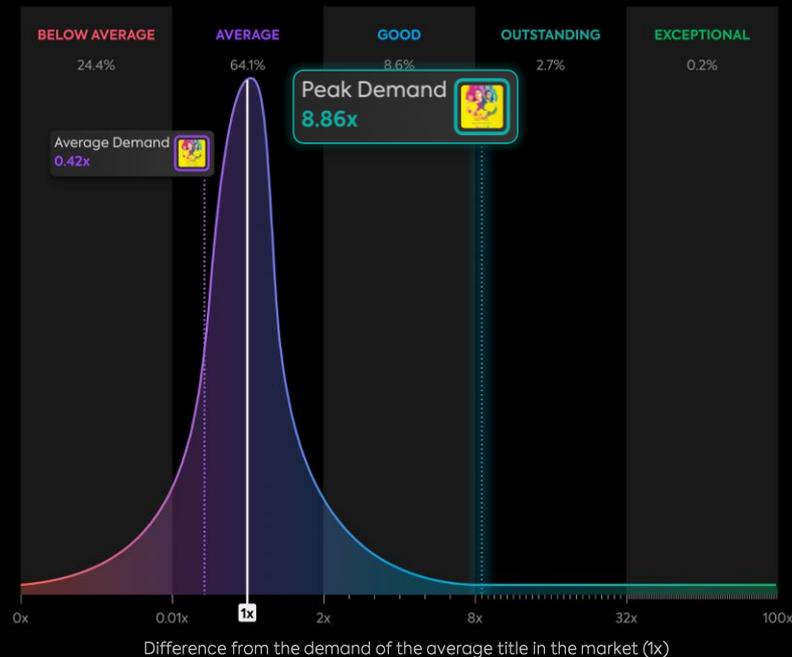
🇯🇴 Peak Domestic Rank

ALL-TIME
#3

🌐 Peak Global Rank

ALL-TIME
#380

100%
100% | 84% | 77% | 59% | 56% | 51% | 40% | 38% | 37% | 31% | 29% | 25%

ORIGIN

JO | IN | EG | LB | SA | AE | DZ | MA | PK | US | DE | GB

BELOW AVERAGE	AVERAGE	GOOD	OUTSTANDING	EXCEPTIONAL
24.4%	64.1%	8.6%	2.7%	0.2%

Peak Demand
8.86x

Average Demand
0.42x

0x | 0.01x | 1x | 2x | 8x | 32x | 100x

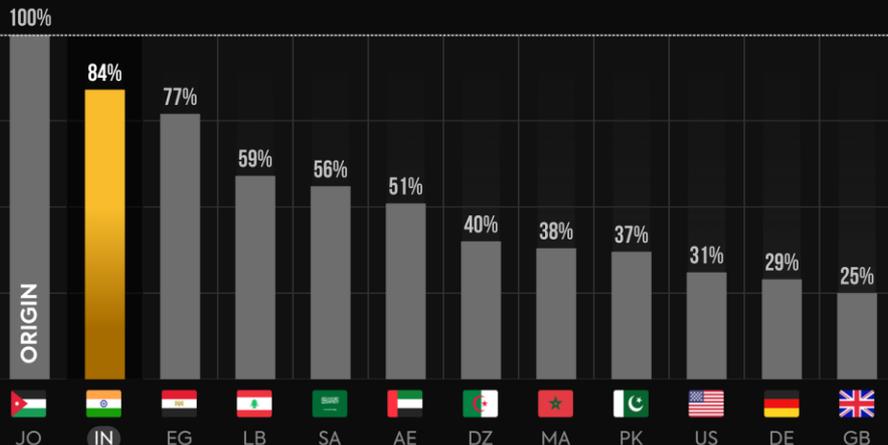Difference from the demand of the average title in the market (1x)

rise | PARROT ANALYTICS

Crashing Eid (جايبة العيد)

17%
Travelability to China

Crashing Eid shows strong global appeal, with top markets outside Saudi Arabia primarily in non-MENA regions. This highlights its travelability indicates potential to captivate viewers in diverse cultural contexts and expand into new, non-Arabic markets.
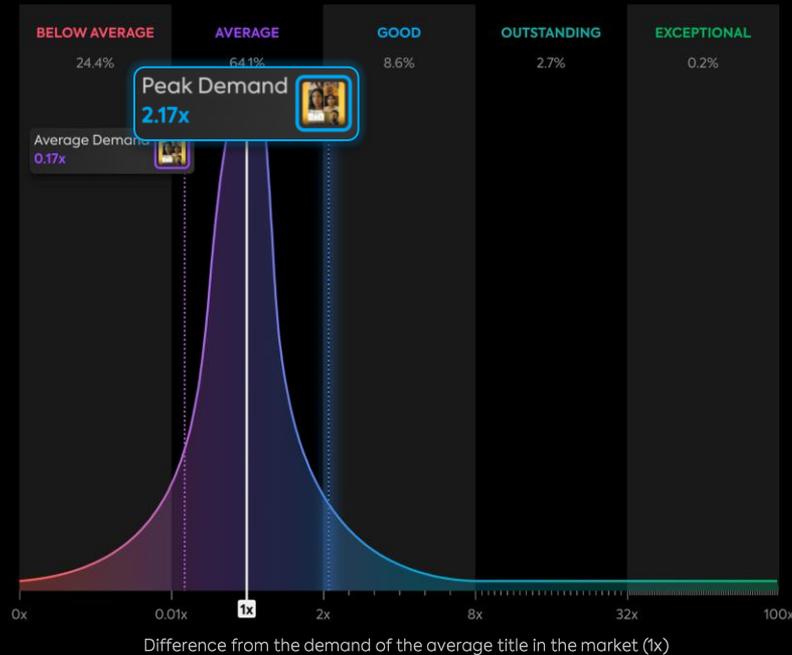
Peak Domestic Rank
ALL-TIME
#11

Peak Global Rank
ALL-TIME
#3767

100%

ORIGIN

SA	CN	FR	NL	PR	GB	ZA	IN	DE	AU	ES	CA
	17%	12%	11%	7%	7%	6%	6%	5%	4%	4%	4%

BELOW AVERAGE	AVERAGE	GOOD	OUTSTANDING	EXCEPTIONAL
24.4%	64.1%	8.6%	2.7%	0.2%

Peak Demand
2.17x

Average Demand
0.17x

0x   0.01x   1x   2x   8x   32x   100x

Difference from the demand of the average title in the market (1x)

rise
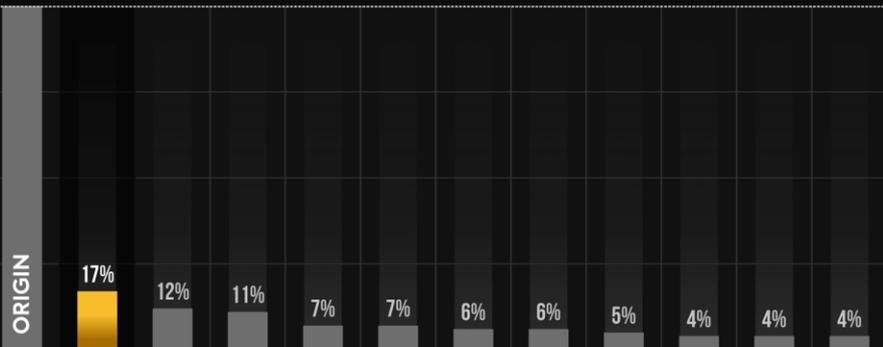
PARROT ANALYTICS

Head To Head (راس براس)

56%
Travelability to Spain

Head to Head achieved a top 10 ranking for non-English content on **Netflix**, underscoring its global appeal and strong performance among international audiences.
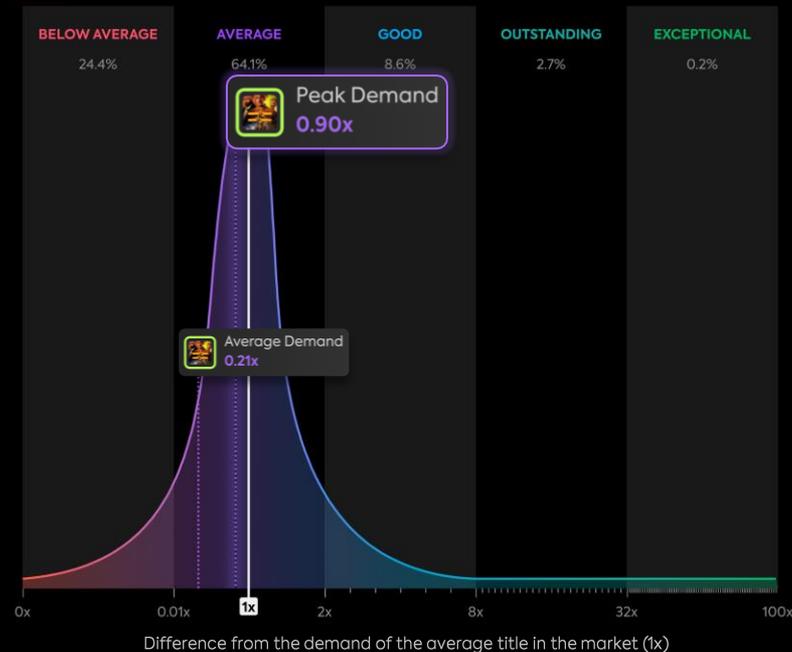
Peak Domestic Rank
ALL-TIME
#5

Peak Global Rank
ALL-TIME
#2610

100%

ORIGIN	56%	47%	45%	26%	26%	25%	24%	21%	20%	20%	14%
SA	ES	DE	SG	JP	AU	US	GB	BE	BR	AE	MA

BELOW AVERAGE	AVERAGE	GOOD	OUTSTANDING	EXCEPTIONAL
24.4%	64.1%	8.6%	2.7%	0.2%

Peak Demand
0.90x

Average Demand
0.21x

0x   0.01x   1x   2x   8x   32x   100x

Difference from the demand of the average title in the market (1x)
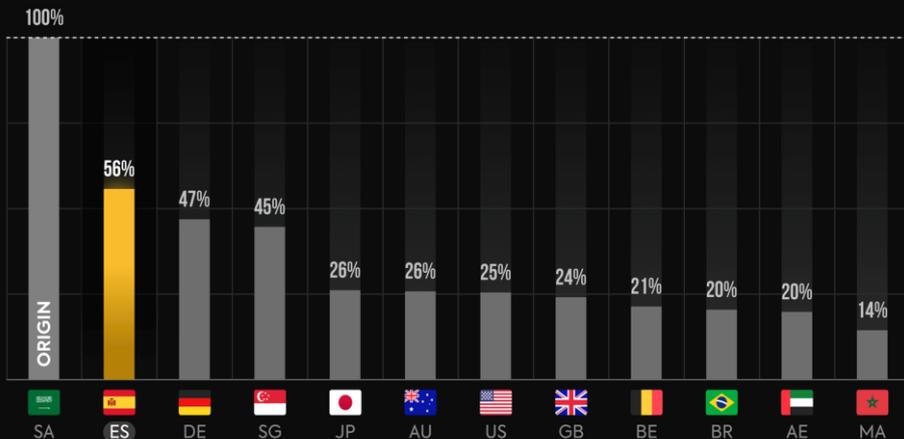
The Giza Killer (سفاح الجيزة)

150%
Travelability to Germany

The Giza Killer has achieved impressive international traction, with demand in Germany reaching 150% of that in its home market, Egypt. This indicates a strong resonance with German audiences and highlights its significant travelability beyond the MENA region.

🇪🇬 **Peak Domestic Rank**

ALL-TIME
#1

🌐 **Peak Global Rank**

ALL-TIME
#1512

150%
100%
92%

ORIGIN

29% 28% 23% 17% 15% 10% 8% 7% 6%

| DE | EG | RU | NZ | SA | AE | BG | CH | GR | PL | CN | UA |

BELOW AVERAGE 24.4% **AVERAGE** 64.1% **GOOD** 8.6% **OUTSTANDING** 2.7% **EXCEPTIONAL** 0.2%

Peak Demand
4.51x

Average Demand
0.34x

0x 0.01x 1x 2x 8x 32x 100x

Difference from the demand of the average title in the market (1x)

rise
PARROT ANALYTICS
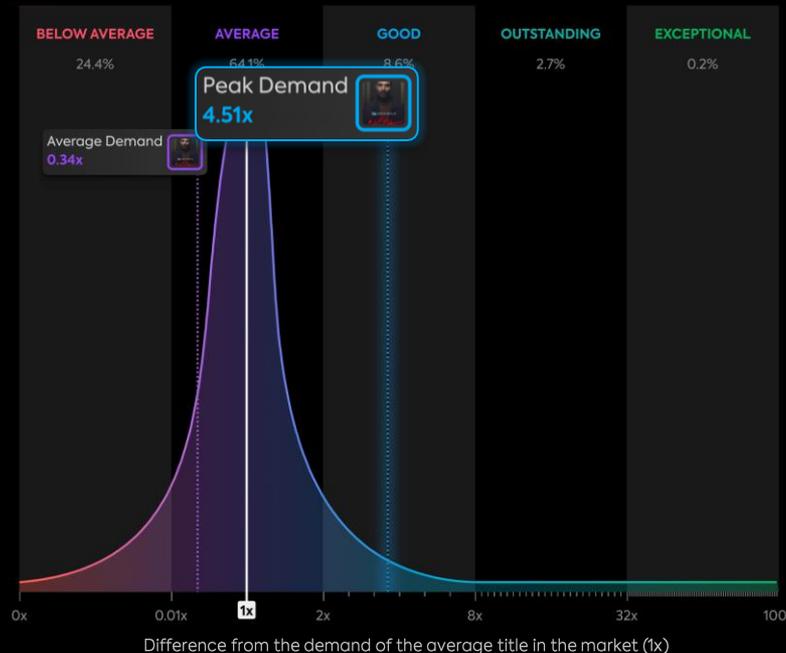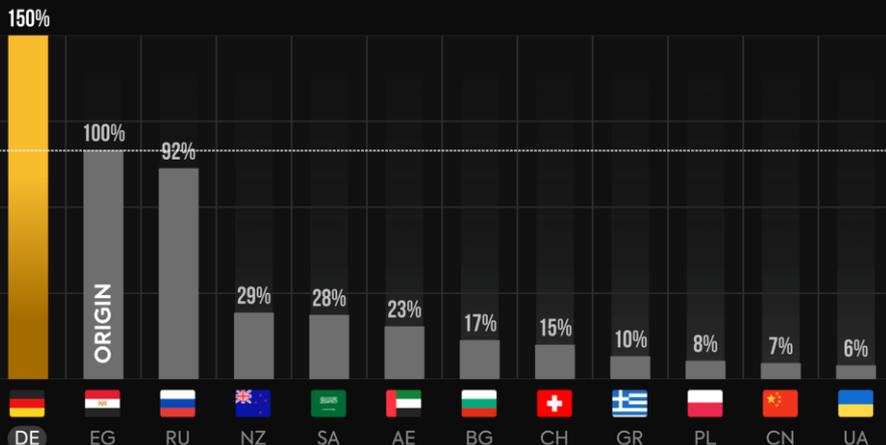
Balancing Regional Popularity with Global Reach

Arabic Content Travelability
YTD

MENA Demand

Travelability

Shabab Al Bomb
(البومب)

Nesr El-Saeed
(نسر الصعيد)

The Giza Killer
(سفاح الجيزة)

Al Hayba
(الهيبة)

Harat Al Qubah
(حارة القبة)

AlRawabi School For Girls
(مدرسة الروابي للبنات)

The Accused
(المتهمة)

Average

Countries

- ● SA
- ● JO
- ● EG
- ● AE
- ● LB
- ● Other

rise
PARROT ANALYTICS
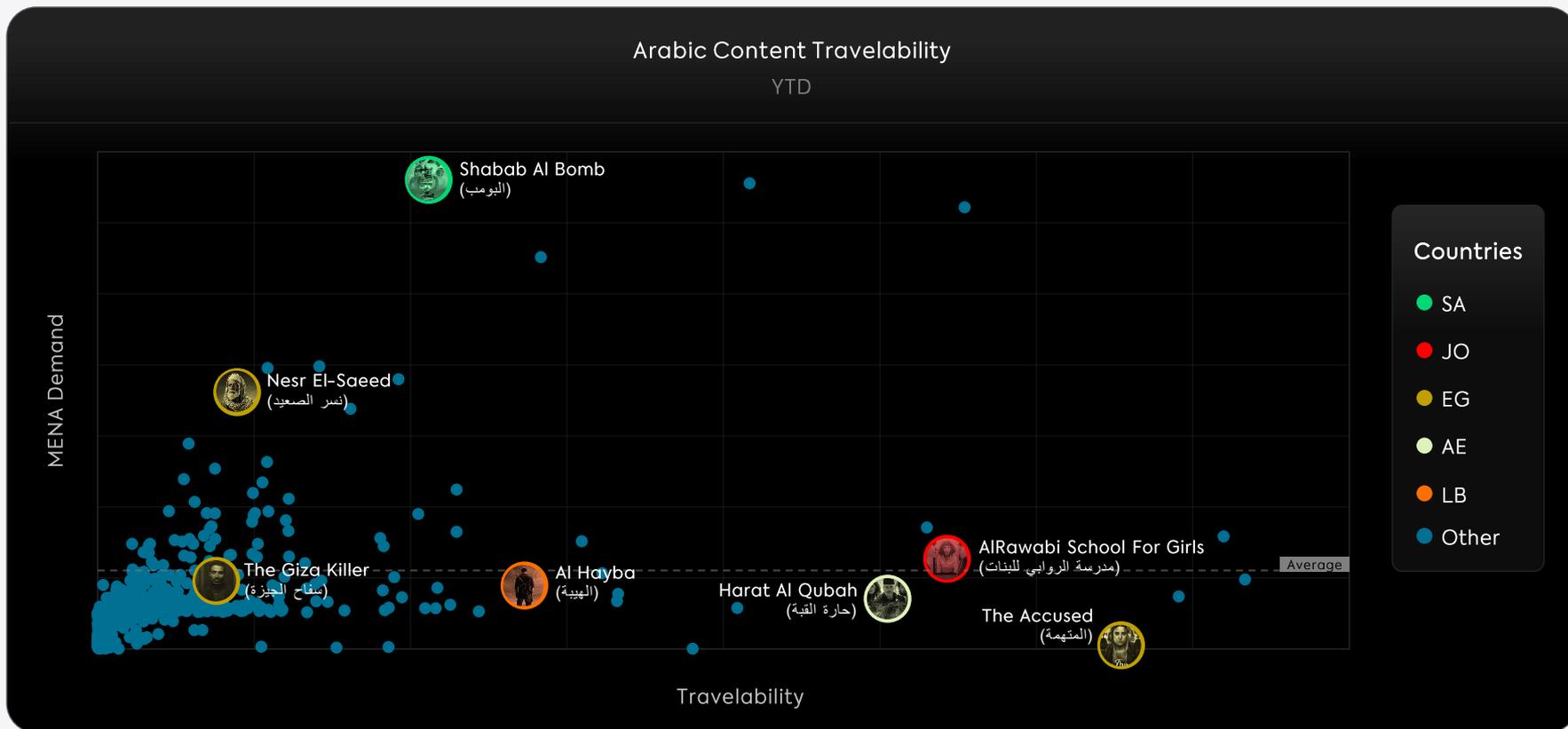
Unlocking the future of Arabic content

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.

Regional collaboration can help spread the word

Cross-regional collaborations offer an opportunity for Arabic content to tap into broader audiences and expand appeal. As co-productions and collaborations continue to increase, Arabic content has the potential to become a regional powerhouse – influencing markets beyond MENA

Authenticity will drive global appeal:

Audiences around the world are seeking authentic stories that reflect diverse cultures. As seen with Al Rawabi and Hayba, the success of original Arabic production are deeply rooted in local culture.

Collaborating with Global platforms

As global partners continue to want to expand their international libraries, Arabic productions are well-positioned to thrive, but they must maintain a high level of quality and innovation to stand out.

Keeping in mind universal themes

Shows like Al Rawabi and Hayba highlight universal themes that resonate with more people like family, identity and justice. By combining local culture and universal emotions, Arabic content will capture international audiences.

Staying close to the data

Tracking travelability and audience data helps producers understand which markets are more receptive, allowing us to innovate and adapt and optimizes strategies.

Unlocking the magic of content
in the attention economy

Los Angeles, US
750 N San Vicente Blvd
West Hollywood, CA 90069

Auckland, NZ
20 Augustus Terrace
Parnell, 1052

New York, US
12 East 49th St,
11th Floor NY 10017

London, UK
16 Great Chapel St
London, W1F 8FL

Sao Paulo, BR
Av. Paulista, 2537
SP 01311-300

Dubai, UAE
Media City, Thuraya
Tower 1, 2204

APPENDIX

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.

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

What is Demand? Quick Recap

Platform
Proliferation

Audience
Fragmentation

Ineffective Traditional
Audience Measurement

ATTENTION ECONOMY

**TIME & ATTENTION
ARE A FINITE RESOURCE**

Social
Media

Research

EXPRESSIONS
OF
DEMAND

Consumption

Social
Video

**CONSUMER
JOURNEY**

**IS MUCH MORE
COMPLEX THAN
BEFORE**

We capture the
behavior of 2 billion
consumers around
the world

We clean, enrich, and
combine all digital
signals users emit for
content into
a single metric and
weighting by the time
and effort it takes for
each interaction

We provide the
world's only global
audience demand
measurement system
quantifying the
value of content,
talent & all forms of IP

DEMAND SYSTEM:

Higher

WEIGHT OF DEMAND

Lower

Creative Participation

Active Consumption

Deep Research

Social Encouragement

Public Posting

Expressing an Opinion

Subscribing to Updates

Indicating Interest

Passive Impressions

rise
studios

PARROT
ANALYTICS