Is Hollywood Losing its Influence Over Global Audiences?

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Digital I

THE INCREASED UPTAKE IN NON-ENGLISH LANGUAGE CONTENT ON STREAMING PLATFORMS

- INTRODUCTION TO THE DATA
- GLOBAL TRENDS IN NETFLIX VIEWING
- US UPTAKE OF NON-ENGLISH LANGUAGE CONTENT ON NETFLIX
- PAN-EUROPEAN TRENDS IN NON-ENGLISH LANGUAGE VIEWING ON NETFLIX & PRIME VIDEO
- THE SQUID GAME EFFECT
- REFLECTION ON THE FUTURE OF GLOBAL ENTERTAINMENT

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INTRODUCTION TO THE DATA

INTRO TO digital i

19 + years experience in TV audience reporting

Licenced BARB bureau – UK reporting

Launched SVOD measurement system SoDA in 2019

Measuring Netflix and Amazon viewing activity across 9 European territories

Developing global SVOD measurement system

Clients across the length and breadth of the media industry

Emphasis on creating IT solutions to provide new ways of looking at viewing data

INTRO TO THE SODA DATA

Any platform that allows users to see their personal data is measurable through the SoDA methodology. Platforms value capturing this history, and viewers value seeing their viewing history.

Nationally representative, managed panel.

All devices, offline viewing, out-of-home viewing.

Insight into account & profile viewing rather than households.

Users reclaim their own online data and are rewarded for sharing it.

A global SVOD measurement system is possible.

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OTHER DATA SOURCES

- Netflix – Netflix Top 10 Data - https://top10.netflix.com/
- Bloomberg Analysis – IMDB & Netflix data - **https://www.bloomberg.com/news/newsletters/2022-03-13/these-are-netflix-s-most-popular-shows-according-to-netflix**

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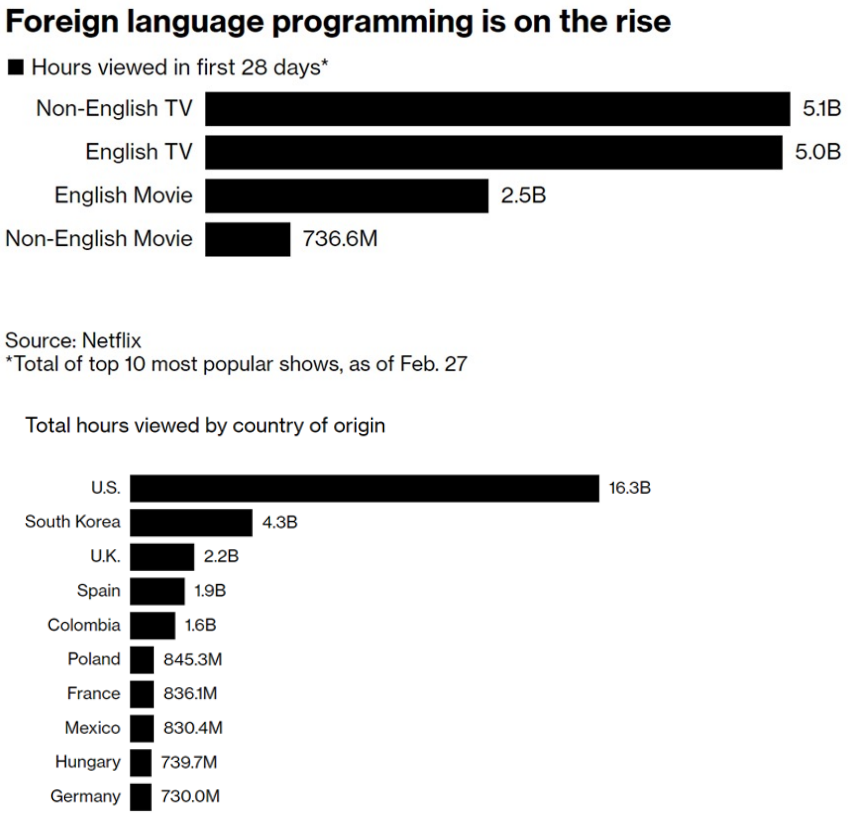
GLOBAL TRENDS IN NETFLIX VIEWING

GLOBAL HITS THEN…

GLOBAL HITS NOW…

NETFLIX HAS SHOWN THAT NON-ENGLISH LANGUAGE CONTENT NOW HAS A CHANCE AT MAKING IT ON THE GLOBAL STAGE.



Title	Category	Weeks in global top 10
Squid Game	Non-English TV	19
Hometown Cha-Cha-Cha	Non-English TV	16
Carinha de Anjo	Non-English TV	15
Money Heist	Non-English TV	14
The Queen of Flow	Non-English TV	14
Maid	English TV	13
Newly Rich, Newly Poor	Non-English TV	13
Red Notice	English Movie	13
Yo soy Betty, la fea	Non-English TV	13
Blood Red Sky	Non-English Movie	11

The charts and figures were sourced from Netflix global figures and analysed and created by Bloomberg – accessible here: https://www.bloomberg.com/news/newsletters/2022-03-13/these-are-netflix-s-most-popular-shows-according-to-netflix

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US TRENDS

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IN THE US, ENGLISH-LANGUAGE & PARTICULARLY US CONTENT STILL DOMINATE

RANKING	TITLE	NO. WEEKS IN TOP 10
1	CoComelon – Season 3	16
2	CoComelon – Season 4	12
2	CoComelon – Season 1	12
3	Squid Game – Season 1	11
4	Maid – Limited Series	10
5	Vivo	9
5	Manifest – Season 1	9
6	Red Notice	8
7	Despicable Me 2	7
7	Ozark – Season 4 Part 1	7
7	The Queen of Flow – Season 2	7
8	Inventing Anna – Limited Series	6
8	Love is Blind – Season 2	6
8	Don't Look Up	6
8	The Witcher – Season 2	6
8	The Holiday	6
8	Clickbait	6
8	All American Season 3	6
9	Sweet Magnolias – Season 2	5
9	All Of Us Are Dead – Season 1	5
9	Money Heist – Part 5	5
9	You – Season 3	5
9	Home	5
9	My Little Pony: A New Generation	5
9	Outer Banks – Season 2	5

- 4 non-English language hits in Korean and Spanish appear in the top 25 shows ranked by number of cumulative weeks they appeared in Netflix's top 10 lists in the US
- This metric is not ideal, but it gives an indication of the increasing willingness to engage with non-English language content.

Source: Netflix - 28th June 2021 – 20th March 2022

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PAN-EUROPEAN TRENDS

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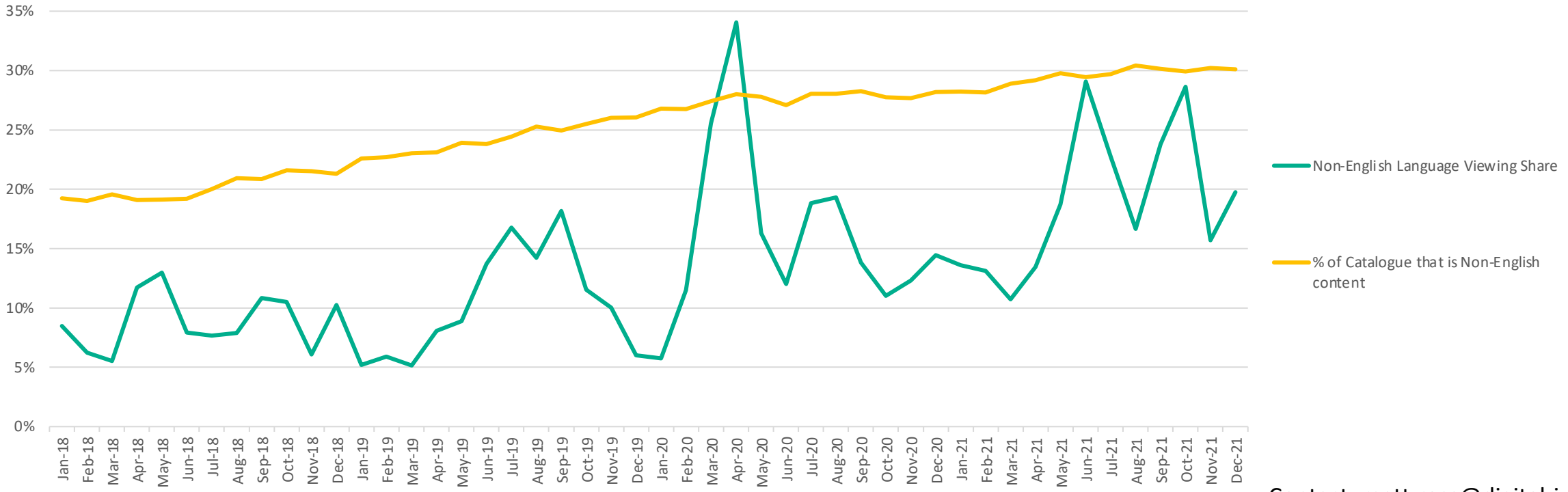
NON-ENGLISH LANGUAGE CONTENT STILL UNDER-INDEXES ON EUROPE'S BIGGEST STREAMING PLATFORMS IN FRANCE, ITALY, GERMANY & SPAIN. BUT THE GAP NARROWS AROUND THE RELEASE OF KEY GLOBAL TITLES.

Non-English Language Content as % of Top 100 Content Viewer Minutes & Total Catalogue x Month, Netflix & Prime Video, UK FIGS & NORDICS, 2018-2021



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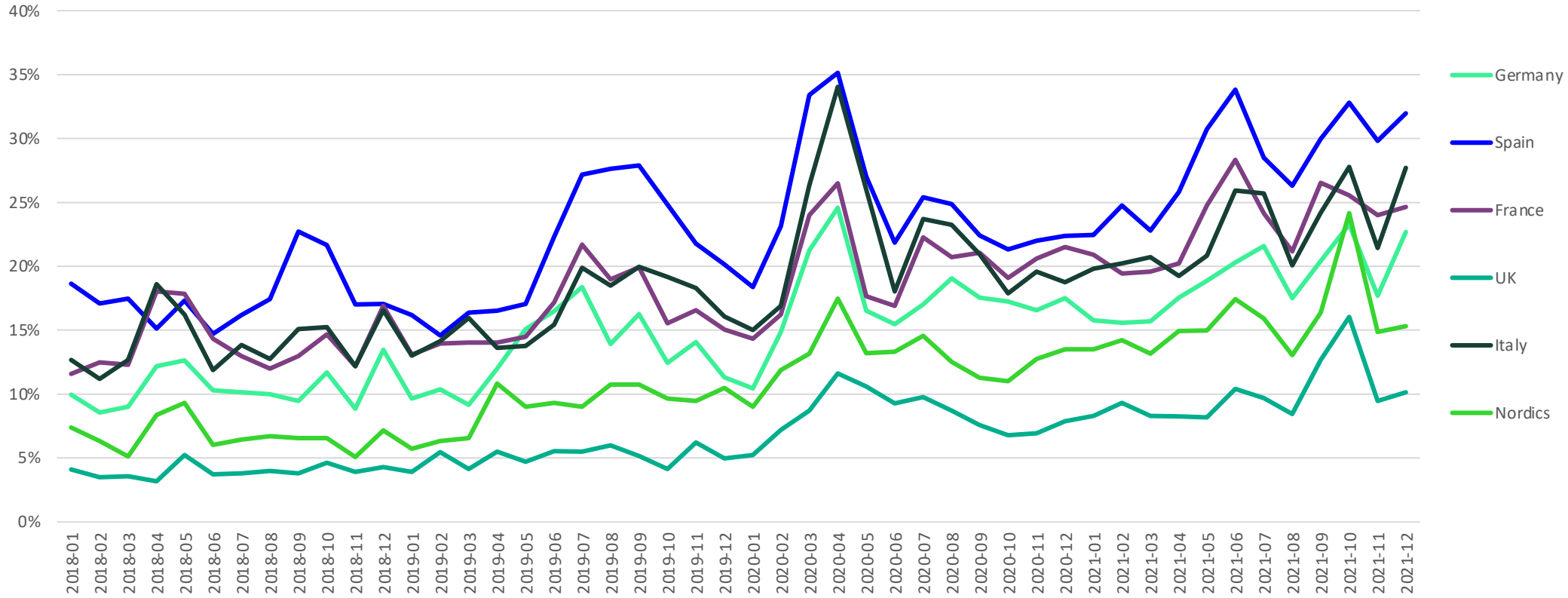
SPAIN, ITALY & FRANCE ARE THE COUNTRIES WITH THE HIGHEST PROPORTION OF NON-ENGLISH LANGUAGE VIEWING, GERMANY & THE NORDICS FOLLOW. THE UK LAGS BEHIND.

Non-English Language Content as % of Total Viewer Minutes x Month X Country, Netflix, UK FIGS & Nordics, 2018-2021



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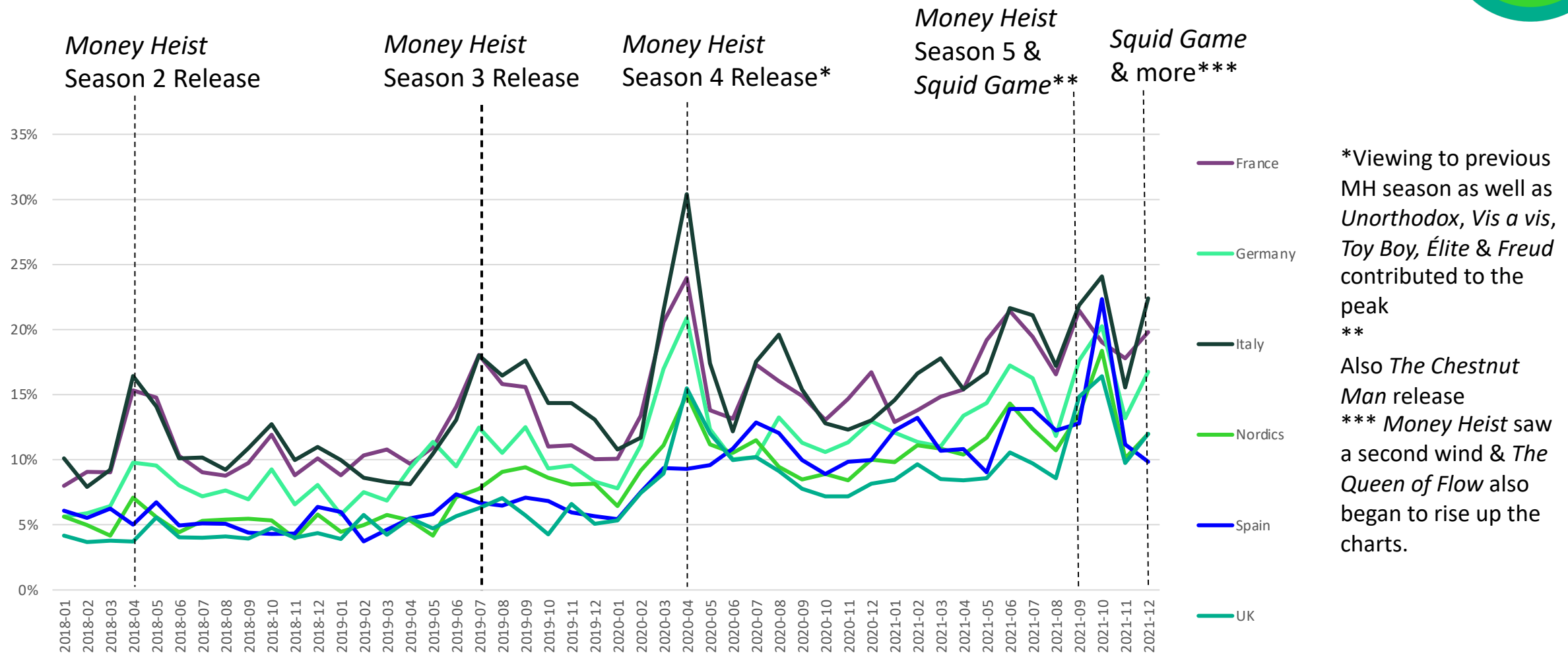
A FEW KEY HITS DRIVE SIGNIFICANT SPIKES IN VIEWING…



*Viewing to previous MH season as well as *Unorthodox*, *Vis a vis*, *Toy Boy, Élite* & *Freud* contributed to the peak

**

Also *The Chestnut Man* release

*** *Money Heist* saw a second wind & *The Queen of Flow* also began to rise up the charts.

Non-English Language Content & Non-Local Language Content as % of Total Viewer Minutes x Month X Country, Netflix, UK FIGS & Nordics, 2018-2021

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THE SQUID GAME EFFECT

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WHERE DO THESE GLOCAL HITS COME FROM? IS HOLLYWOOD LOSING ITS INFLUENCE ON THE GLOBAL ENTERTAINMENT SCENE? CASE STUDY: SQUID GAME

- Made by Siren Pictures Inc. (South Korean production company)
- Financed by Netflix
- Budget of approximately 21 million US dollars
- Less than half the cost of *Stranger Things* per episode and almost a quarter of the price of *The Crown*
- It was and is to date the most popular show to ever launch on Netflix
- In the UK, *Squid Game* was the 2nd most viewed drama of 2021 including all linear channels.

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THE SQUID GAME EFFECT WILL BE FAR-REACHING AND SPARKS A PIVOTAL MOMENT FOR PRODUCERS & GLOBAL ENTERTAINMENT COMPANIES. SVOD PRODUCTION BUDGETS COULD INCREASINGLY BE SPENT OUT OF COUNTRY.

RANKING	TITLE	AVERAGE AUDIENCE (000s)	REACH %
1	Squid Game	60,894	65%
2	Don't Look Up	42,660	49%
3	Red Notice	39,131	46%
4	Lupin – Part 1	38,995	50%
5	The Queen's Gambit	34,895	50%
6	Money Heist – Season 5	34,592	38%
7	Bridgerton – Season 1	33,734	52%
8	Money Heist – Season 4	31,831	40%
9	Enola Holmes	30,911	45%
10	Lupin – Part 2	29,533	35%

Source: Digital i SoDA UK FIGS & NORDICS – Content x season x first 90 days of viewing, ranked by Average Audience, Jan 2018 – Mar 2022,

- Half of the most-viewed content to ever launch on Netflix was from non-English language dramas
- *Squid Game* outperformed all other shows by a large margin
- While Bridgerton & Enola Holmes are in the English language – they were produced in the UK
- Streaming giants are predominantly from the US, meaning that financially, the US is still in a prime position.

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