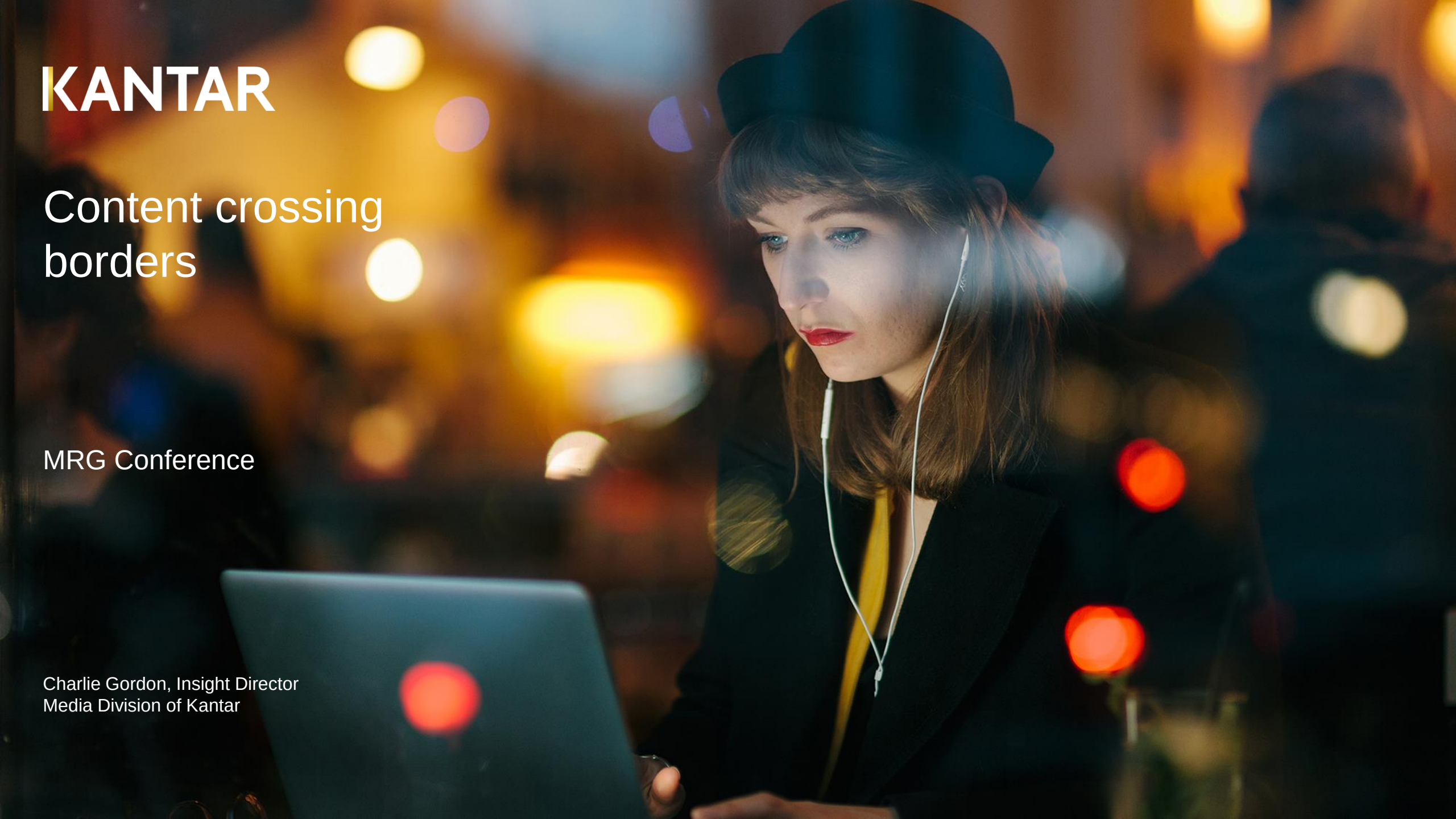


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Content crossing borders

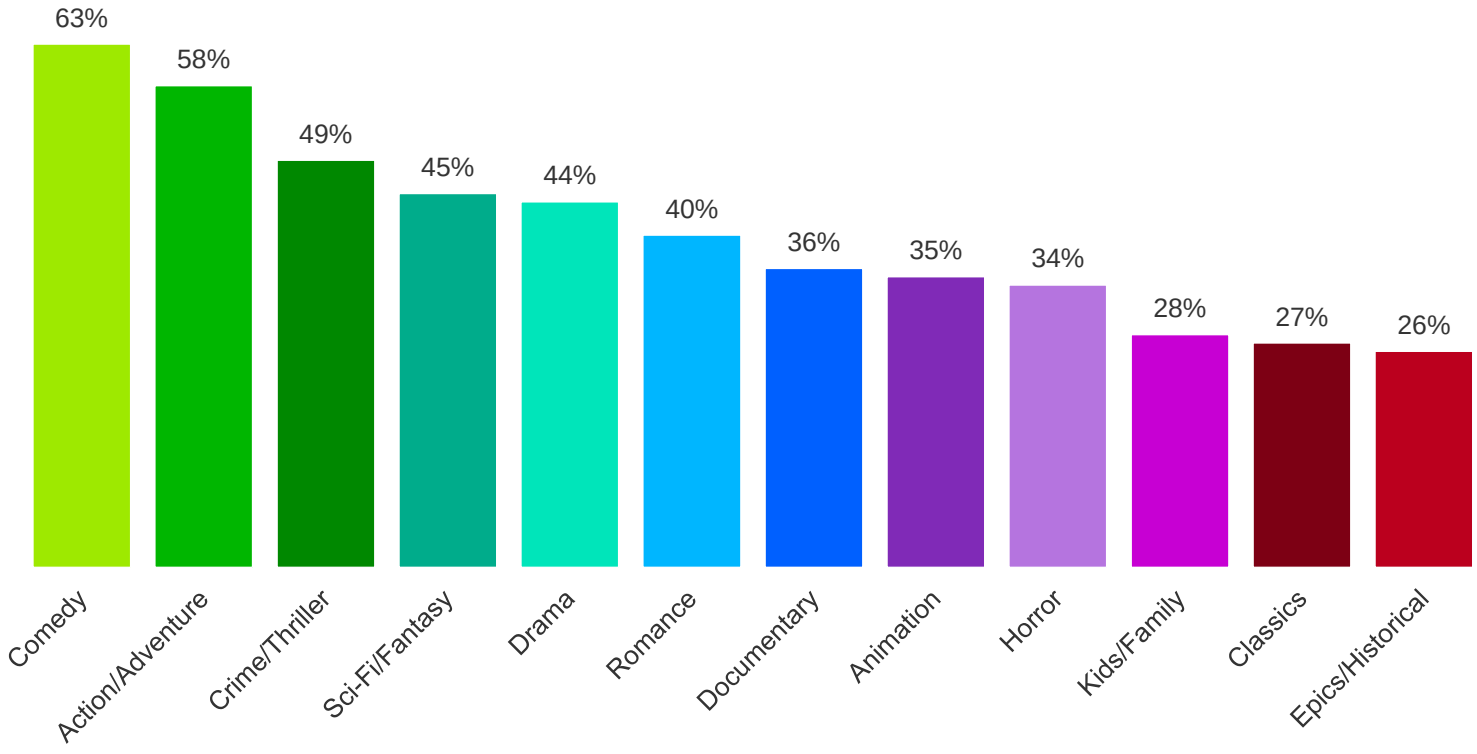
MRG Conference

Charlie Gordon, Insight Director
Media Division of Kantar

Global film content preferences

don’t always correlate with global blockbuster successes

Average ranking of interest of genre for films across 25+ countries



Global ranking of film Blockbusters before COVID

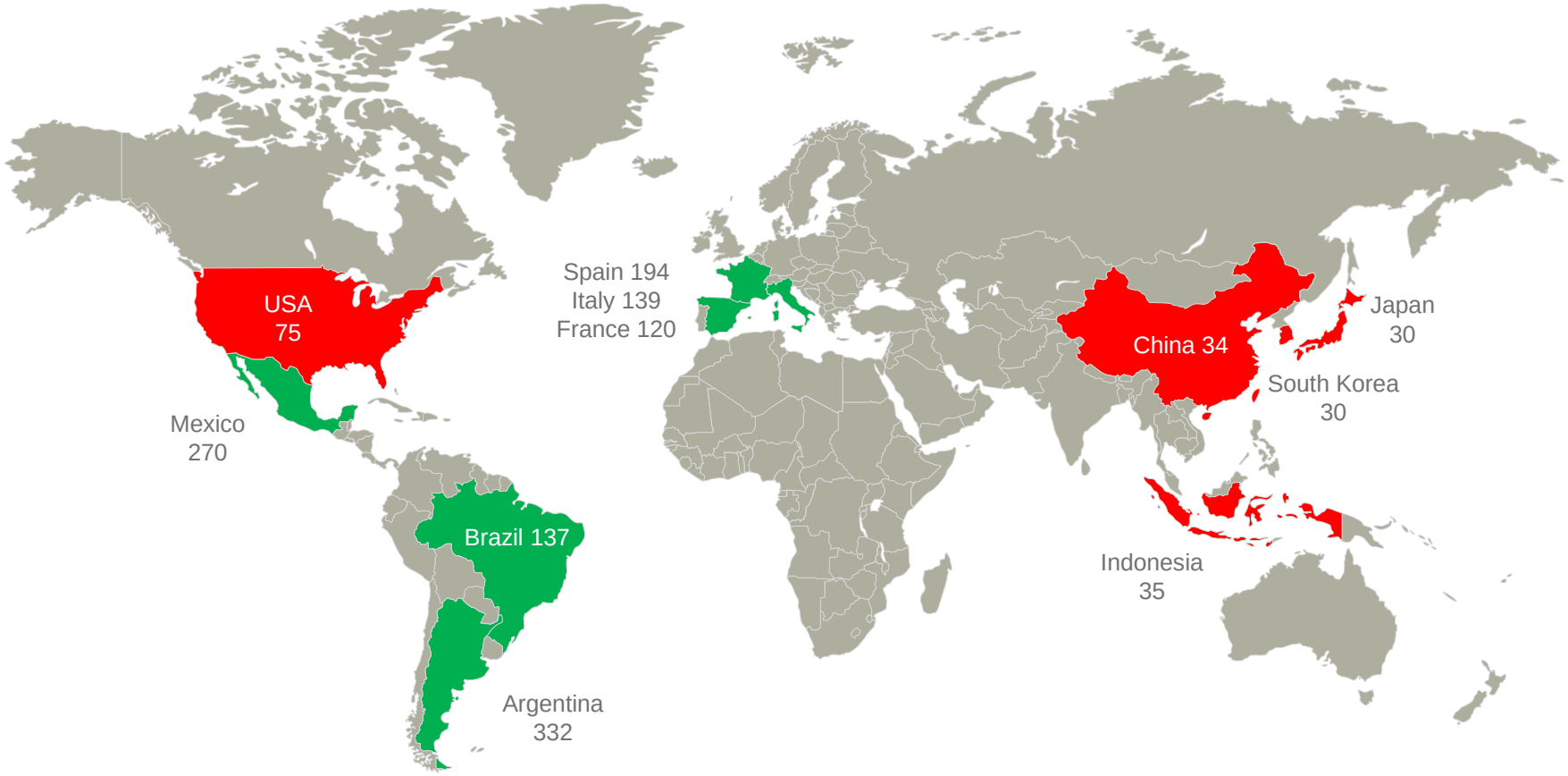
1	Avengers: Endgame	$2,797,501,328
2	The Lion King	$1,656,943,394
3	Frozen II	$1,450,026,933
4	Spider-Man: Far from Home	$1,131,927,996
5	Captain Marvel	$1,128,274,794
6	Joker	$1,074,251,311
7	Star Wars: Episode IX - The Rise of Skywalker	$1,074,144,248
8	Toy Story 4	$1,073,394,593
9	Aladdin	$1,050,693,953
10	Jumanji: The Next Level	$800,059,707
11	Fast & Furious Presents: Hobbs & Shaw	$759,056,935
12	Ne Zha	$726,063,471
13	The Wandering Earth	$699,856,699
14	How to Train Your Dragon: The Hidden World	$521,799,505
15	Maleficent: Mistress of Evil	$491,730,089

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Source: TGI Global Quick View 2020; Box Office Mojo
Sample size: 67,262

Cultural background can influence content preferences

Preference for Latin Music around the world

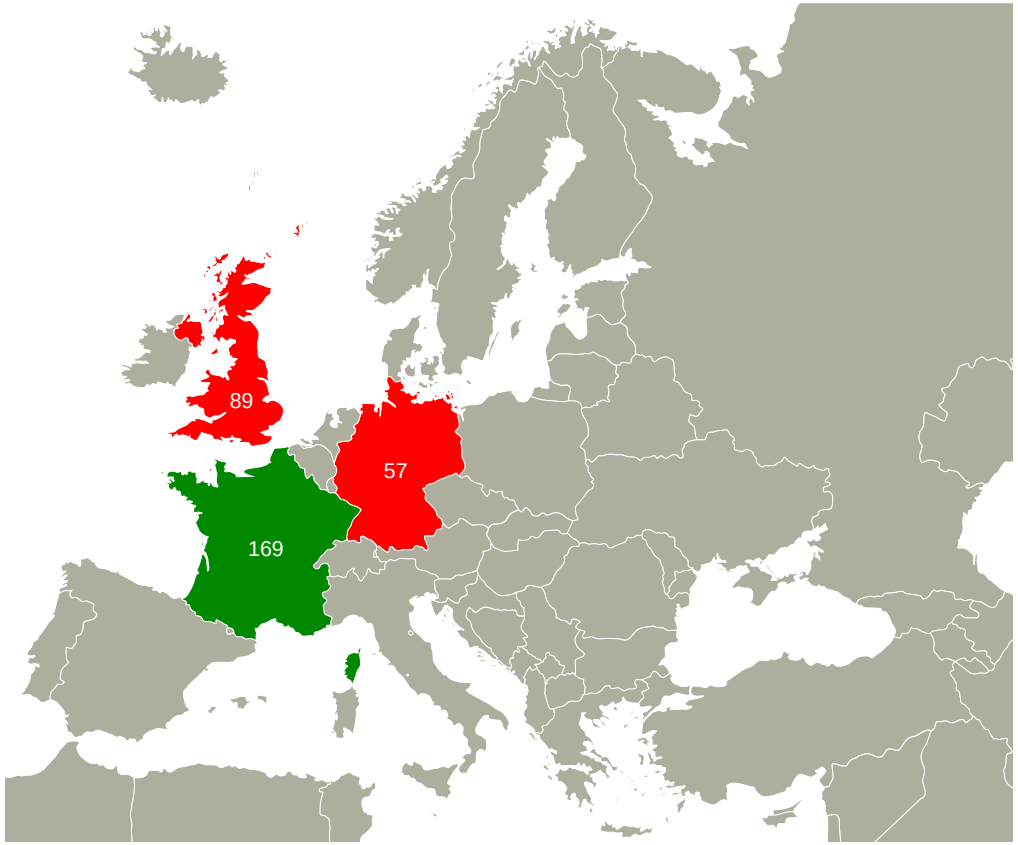


KANTAR

Source: TGI Global Quick View 2020
Sample size: 67,262, sample size per country > 1500

But a genre can be surprisingly successful completely out of its root culture

Case 1



French people have an unexpected passion for Japanese Manga

	elements	total	Germany	France	GB
Animation/manga	Vert %	5%	3%	9%	5%
	Horz %	100%	23%	50%	27%
	Index	100	57	**169**	89

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Source: Europa TGI 2021R1
Sample size: 49,469, sample size per country > 10,000

But a genre can be surprisingly successful completely out of its root culture

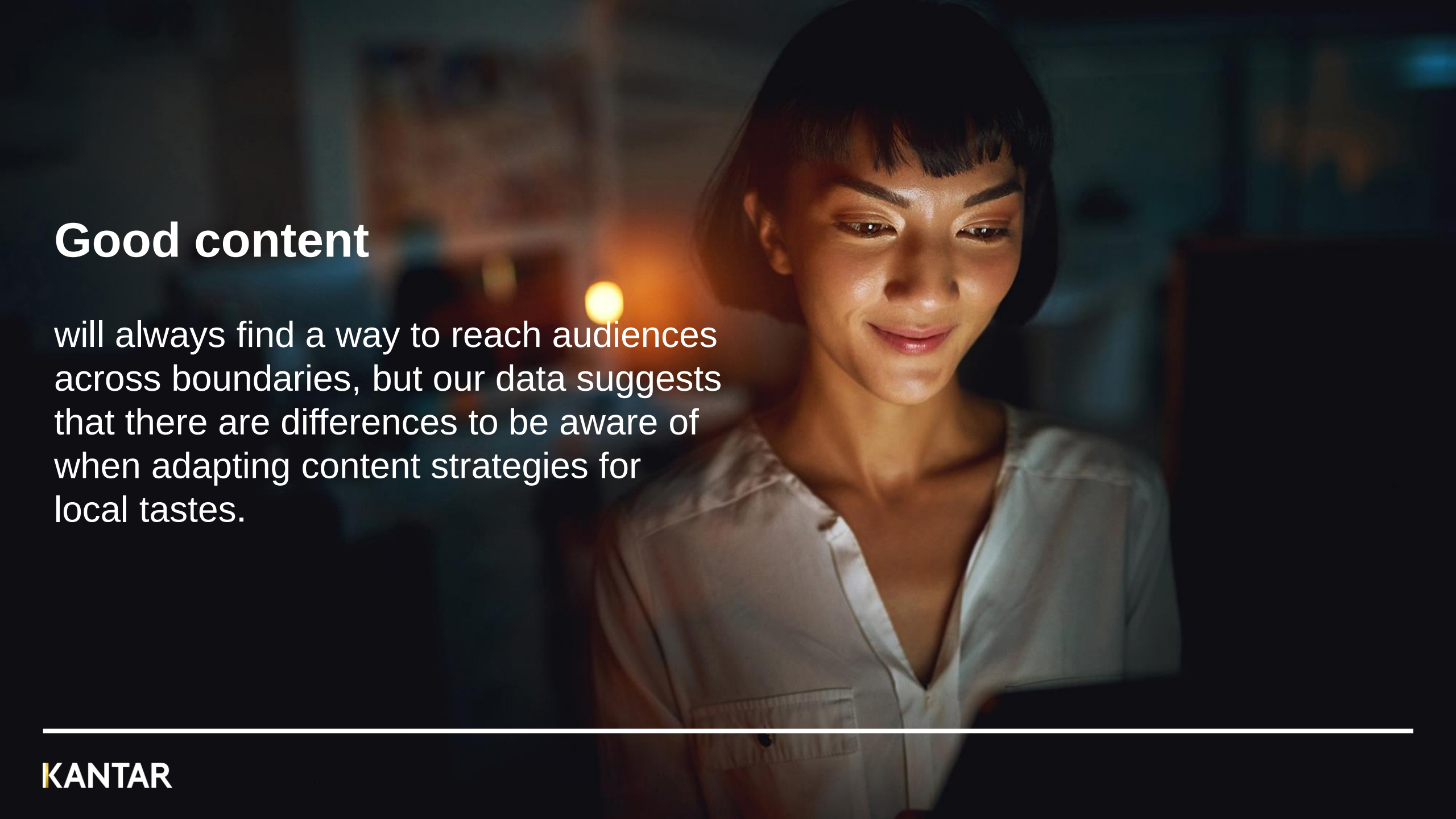
Case 2

What are the factors of success behind the international success of French series Lupin?

With **76 million households** having watched it worldwide, the series topped Netflix ranking in many countries including the US.



1. Action adventure
2. An **international archetype**
3. **French touch**
4. Reach **beyond existing** Arsene Lupin **fans**
5. **Diversity** theme
6. Omar Sy famous **internationally**
7. **Escapism** in lockdown



Good content

will always find a way to reach audiences across boundaries, but our data suggests that there are differences to be aware of when adapting content strategies for local tastes.

We love drama…

Drama as a genre of interest

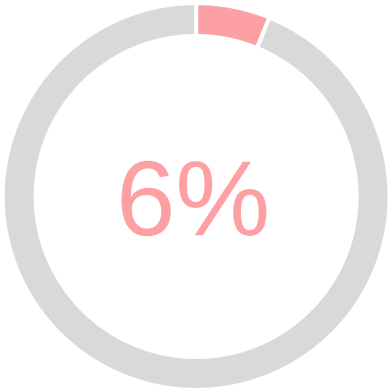
GB



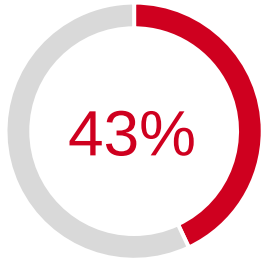
Global average



China



Interested in Drama





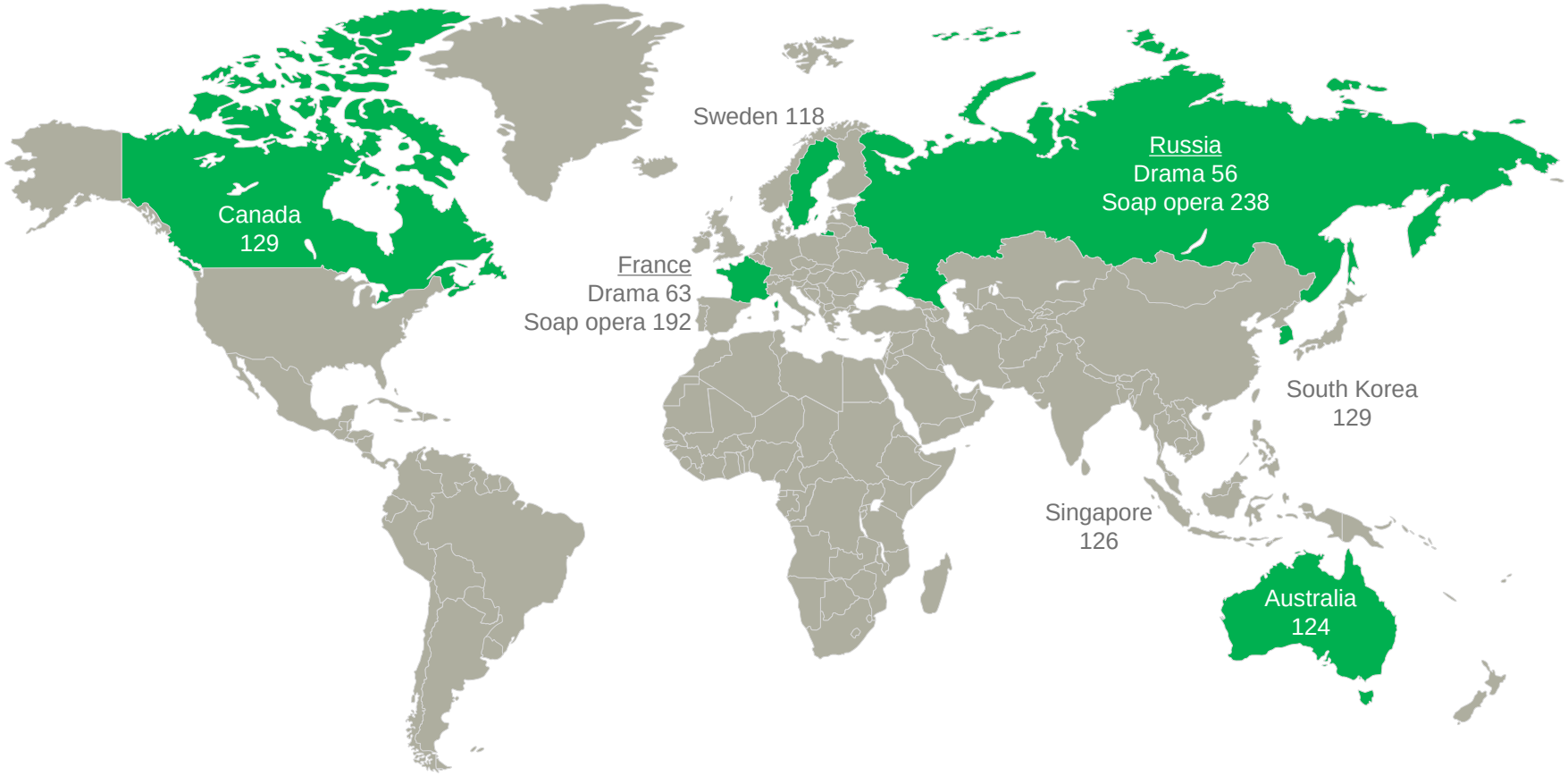
Drama content preferences of
16-17 year olds in GB and globally

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Source: TGI Global Quick View 2020
Sample size: 67,262, sample size per country > 1500

British Drama crossing borders

Downton Abbey's success explained

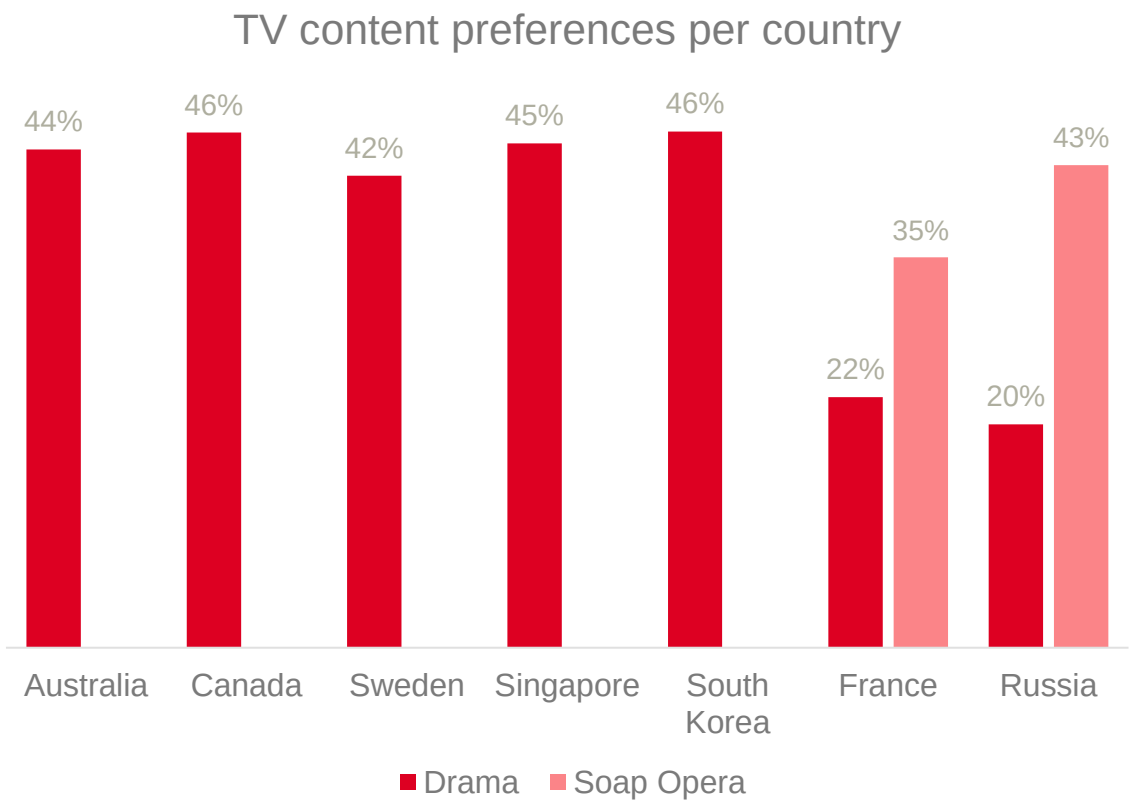


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Source: TGI Global Quick View 2020
Sample size: 67,262, sample size per country > 1500

British Drama crossing borders

Downton Abbey



In most of these countries this ties up with above average taste of **Drama**.

In some other countries it may have been interpreted as a form of period **Soap Opera.** This could explain why France and Russia were hooked.

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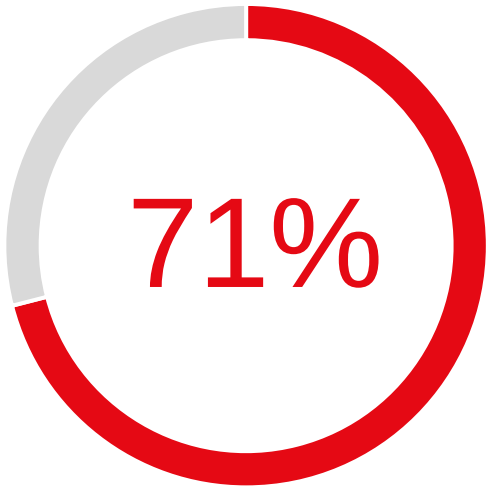
Source: TGI Global Quick View 2020
Sample size: 67,262, sample size per country > 1500

This has **implications** for all on demand service providers as they look to maximise impact when up against the industry behemoths. Furthermore, there are **opportunities** to look at what types of content might extend the reach of your existing service on a market-by-market basis.

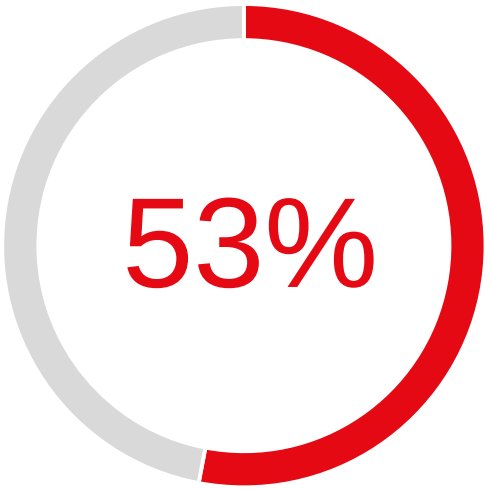
Netflix has been providing light relief during a difficult year

Netflix subscribers in GB are more into comedy and reality TV than non-subscribers

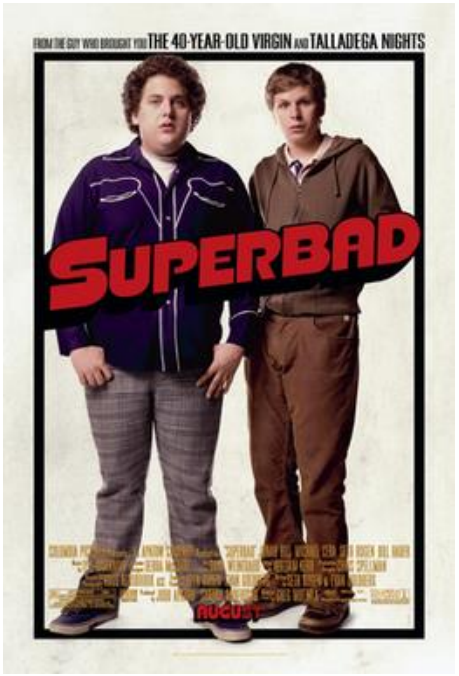
Netflix users



Non-Netflix users



Interested in comedy films

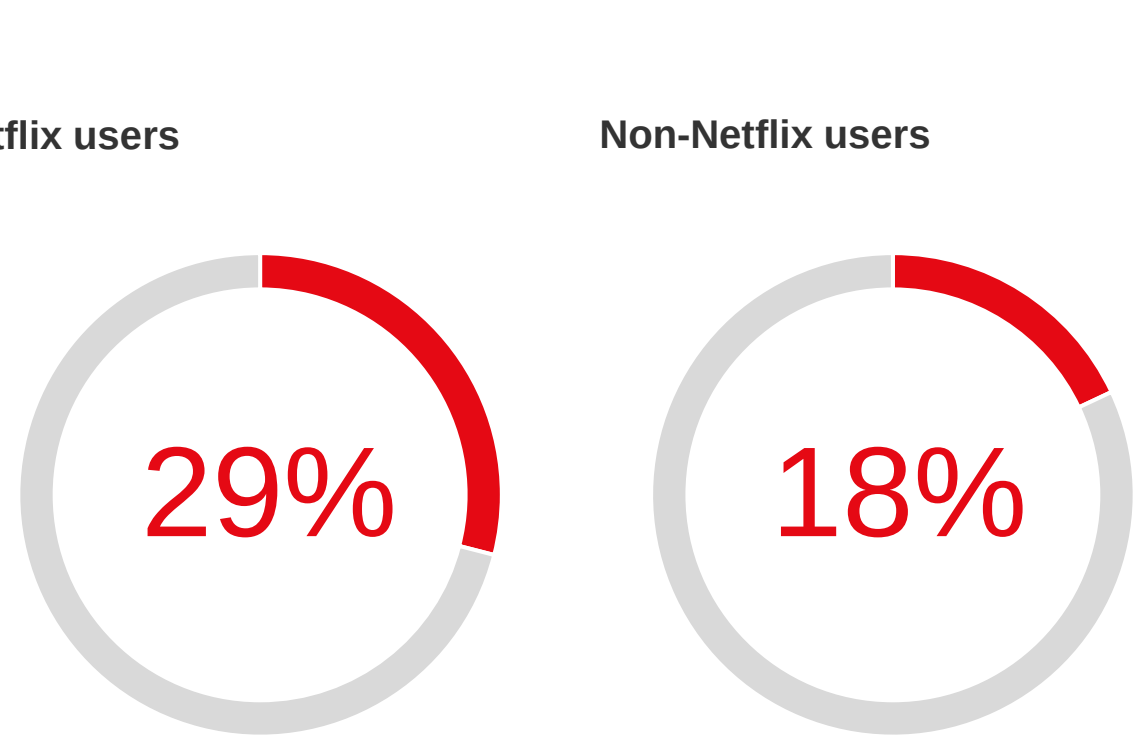




KANTAR

Source: TGI Global Quick View; GB
Sample size: 67,262, sample size per country > 1500

Netflix understands our love of reality TV and has created the ultimate escapism destination









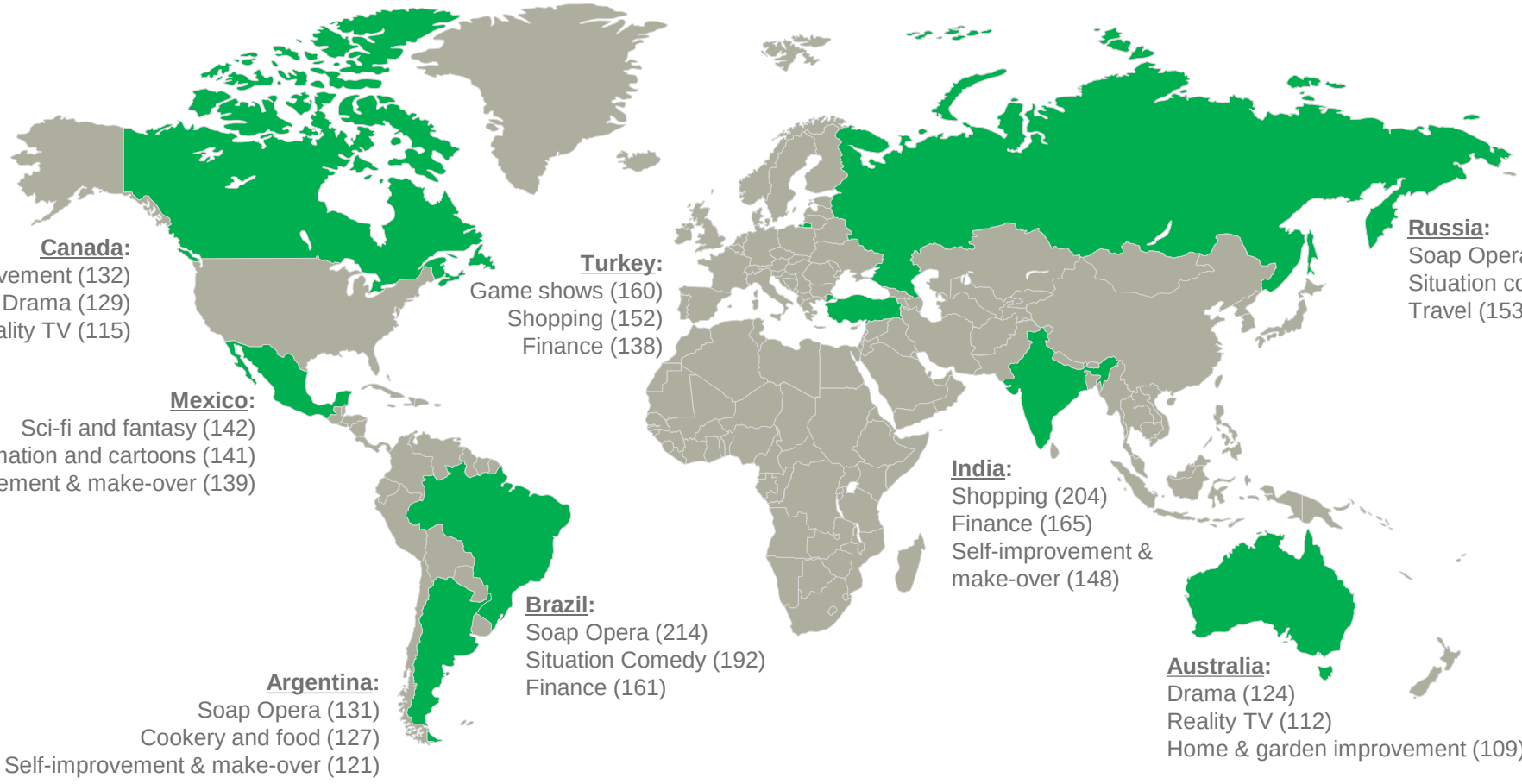


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Source: TGI Global Quick View; GB
Sample size: 67,262, sample size per country > 1500

GB is not the only market with a specific market profile in terms of content

Other places in the world may have unique needs



Canada:
Home & garden improvement (132)
Drama (129)
Reality TV (115)

Mexico:
Sci-fi and fantasy (142)
Animation and cartoons (141)
Self-improvement & make-over (139)

Argentina:
Soap Opera (131)
Cookery and food (127)
Self-improvement & make-over (121)

Brazil:
Soap Opera (214)
Situation Comedy (192)
Finance (161)

Turkey:
Game shows (160)
Shopping (152)
Finance (138)

India:
Shopping (204)
Finance (165)
Self-improvement & make-over (148)

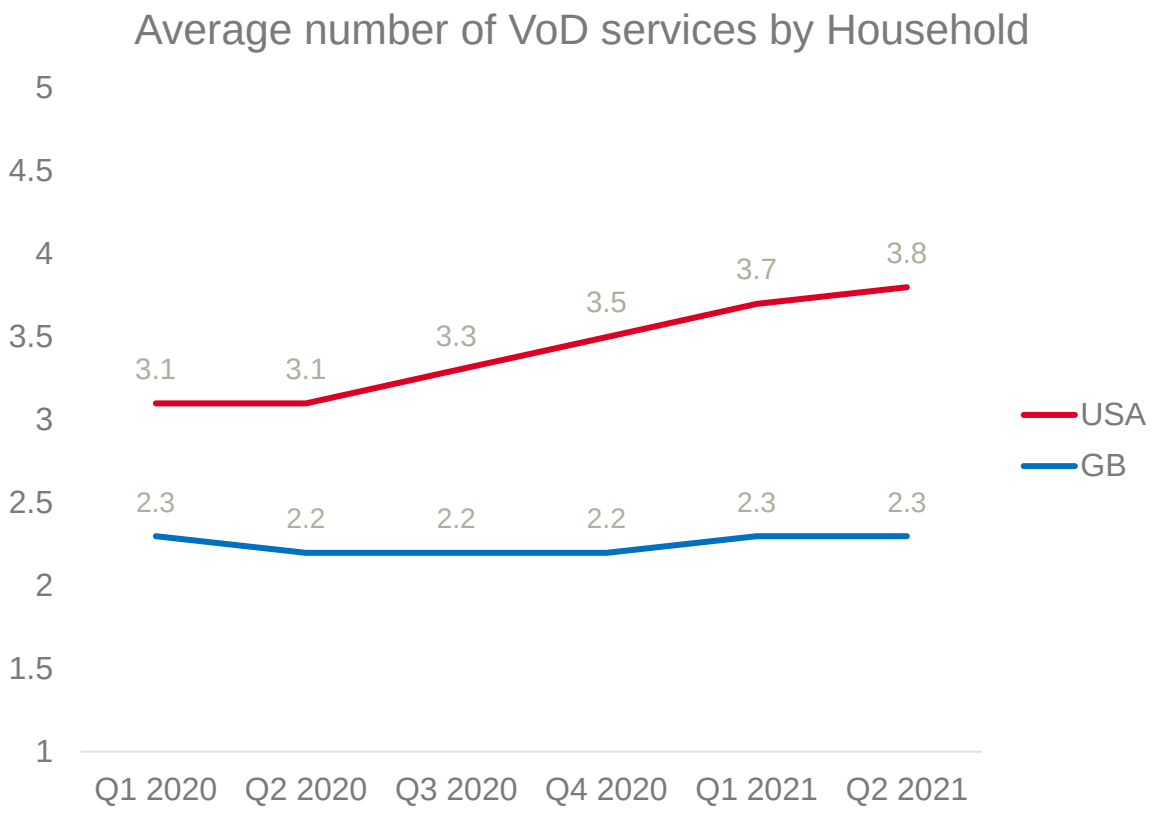
Russia:
Soap Opera (238)
Situation comedy (157)
Travel (153)

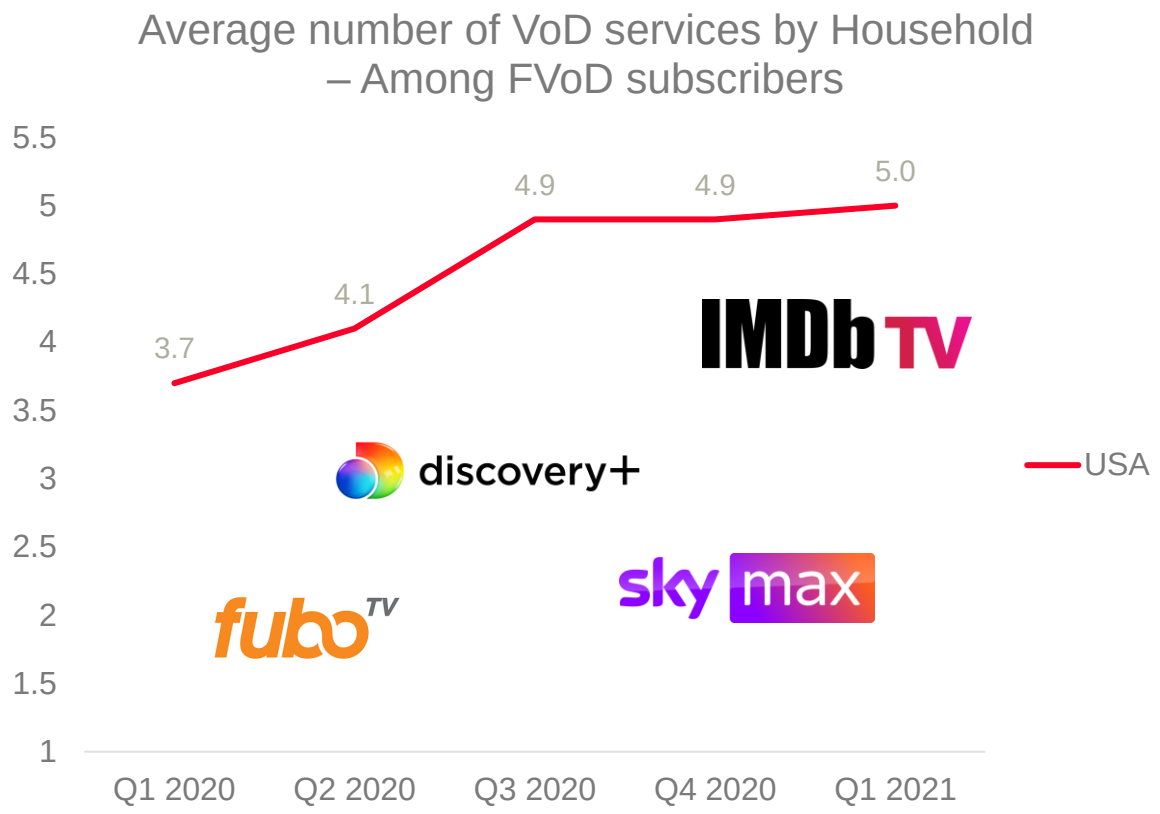
Australia:
Drama (124)
Reality TV (112)
Home & garden improvement (109)

KANTAR

Source: TGI Global Quick View 2020
Sample size: 67,262, sample size per country > 1500

But how big can our appetite grow for multiple services?





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Source: Kantar EoD Q2 2021 US & DE

Conclusions



Safe(r) bets for export

Certain types of content travel more effectively than others, perhaps making for safer investment bets when creating big budget shows/ films.

Good stories travel far

Cultural factors can have a huge impact on content preferences, but good stories that are well crafted with resonant themes can do well anywhere.

Local tastes still matter

In developing content services within markets, it is important to be aware of local tastes and think about how these affect content needs and positioning.

Retention more critical

Understanding all of this is so important. Post-pandemic figures suggest subscriber growth is slowing. It is going to be critical to protect existing subscribers, not just try and win new ones.

Thank you!