

The Global Television Demand Report – Q2 2023

WEBINAR – September 2023



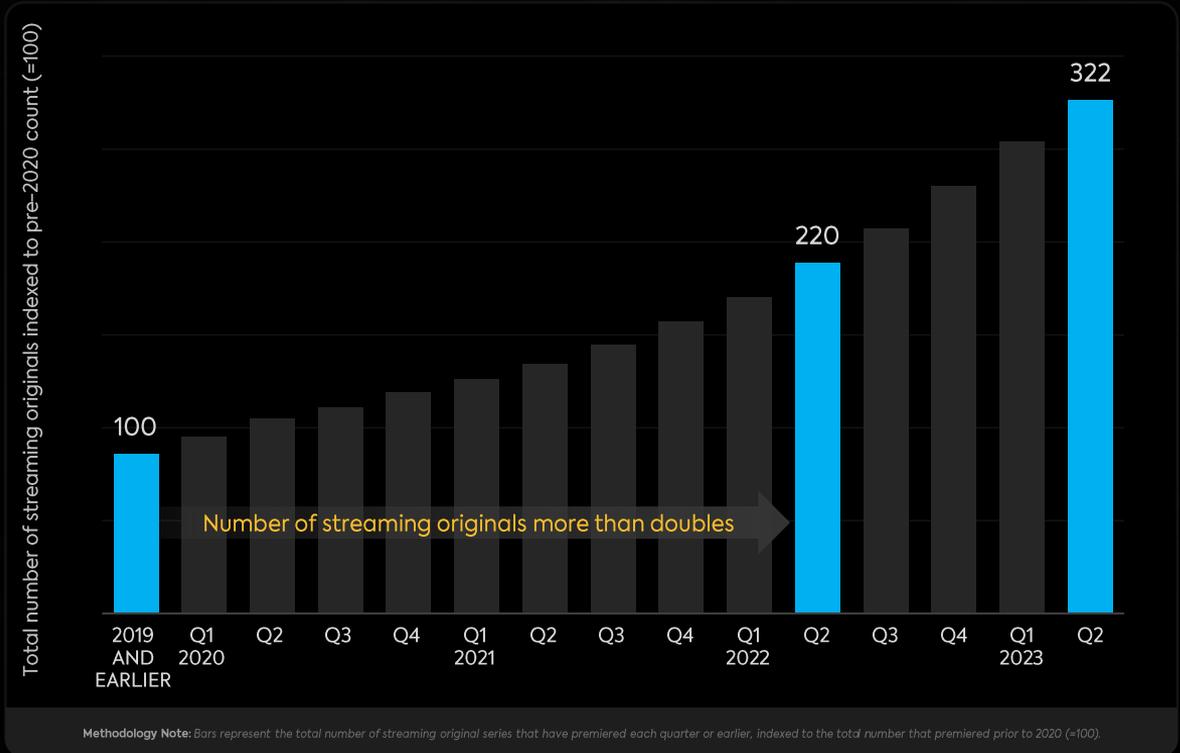
State of Global Streaming



Boom in Number of Streaming Series Since Pandemic

🌐 Total Number of Streaming Original Titles Indexed to Pre-2020 Count (=100) | Q1 2020 – Q2 2023

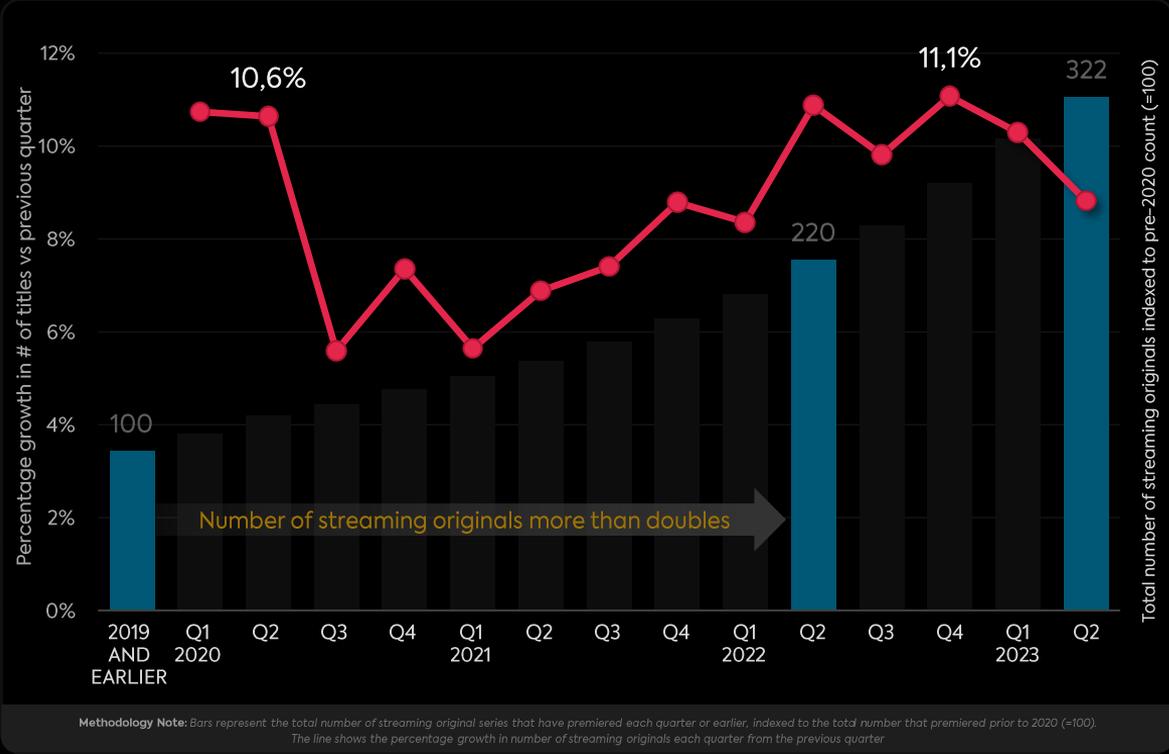
- From 2020 to Q2 2022, the number of streaming original series more than doubled.
- As of Q2 2023, the total number of streaming originals is over 3x the number of streaming series that premiered before 2020



But Pace of New Streaming Series Slowed this Year

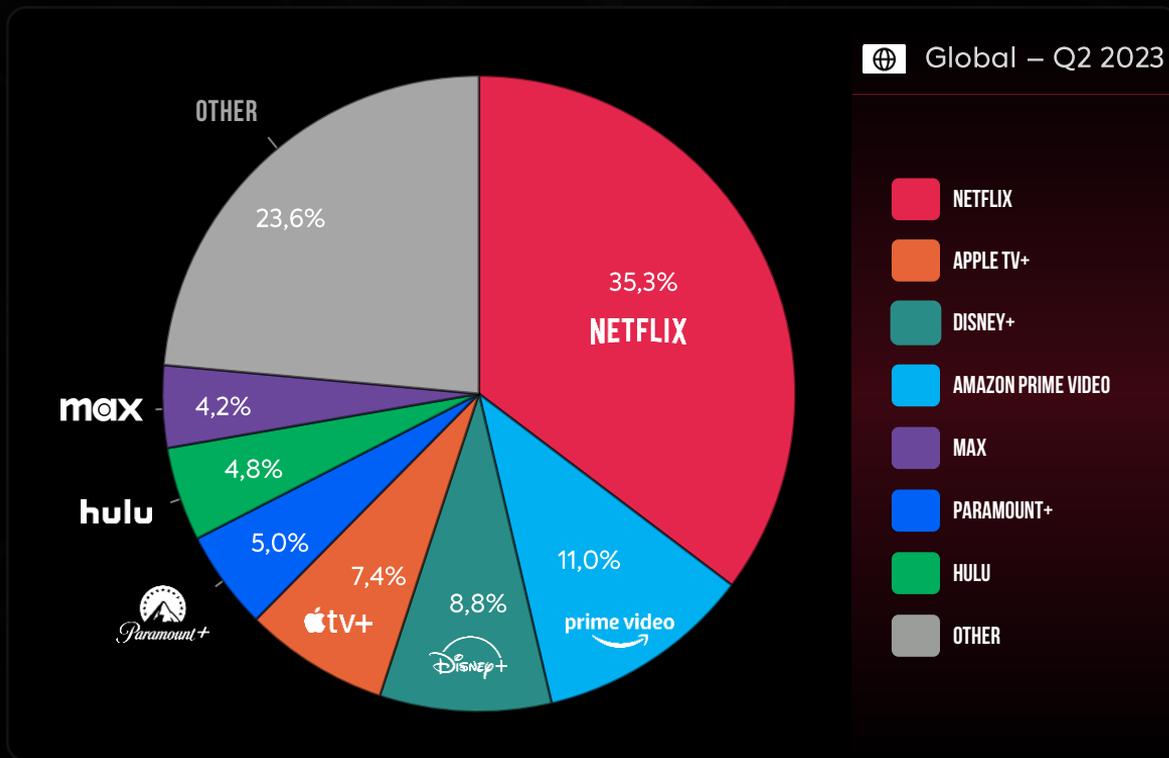
🌐 Monthly Percentage Growth in Number of Streaming Original Titles | Q1 2020 – Q2 2023

- After pandemic disruptions halted production, the pace of new streaming series premiering has increased nearly every quarter
- Until this year... First time that pace of new series premiering has slowed for two consecutive quarters since 2020

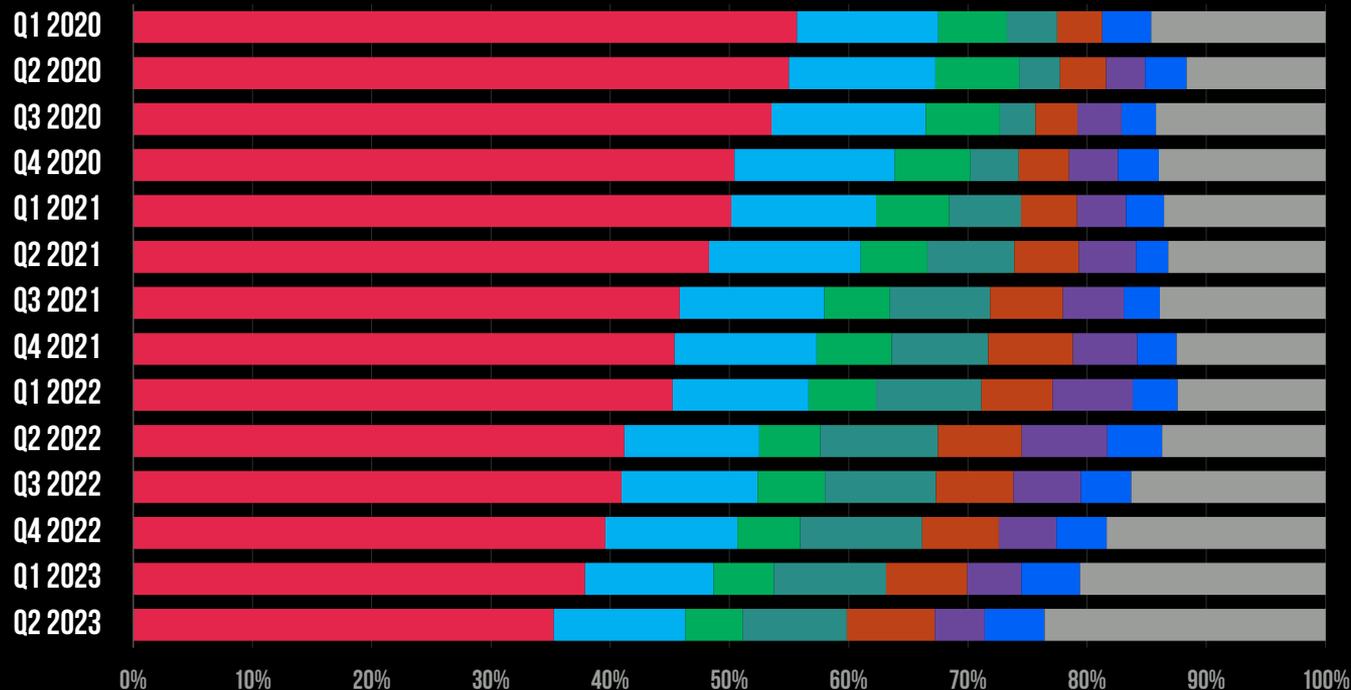


Global Demand Share for all Streaming Original Series – Q2 2023

- Netflix still leads with over a third of global demand
- Originals from top 3 platforms account for >50% of global demand
- Nearly a quarter of global demand for originals from other streamers



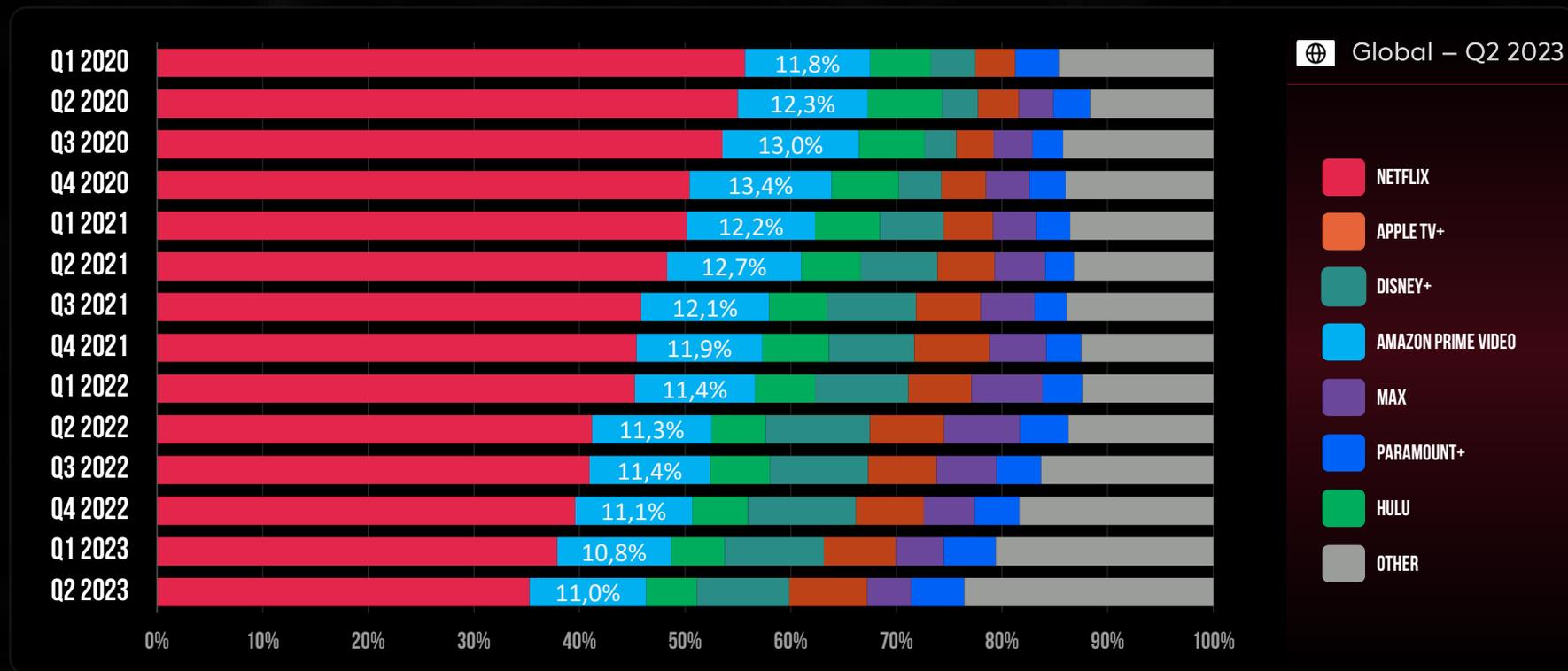
Share of Global Demand for Original Programming



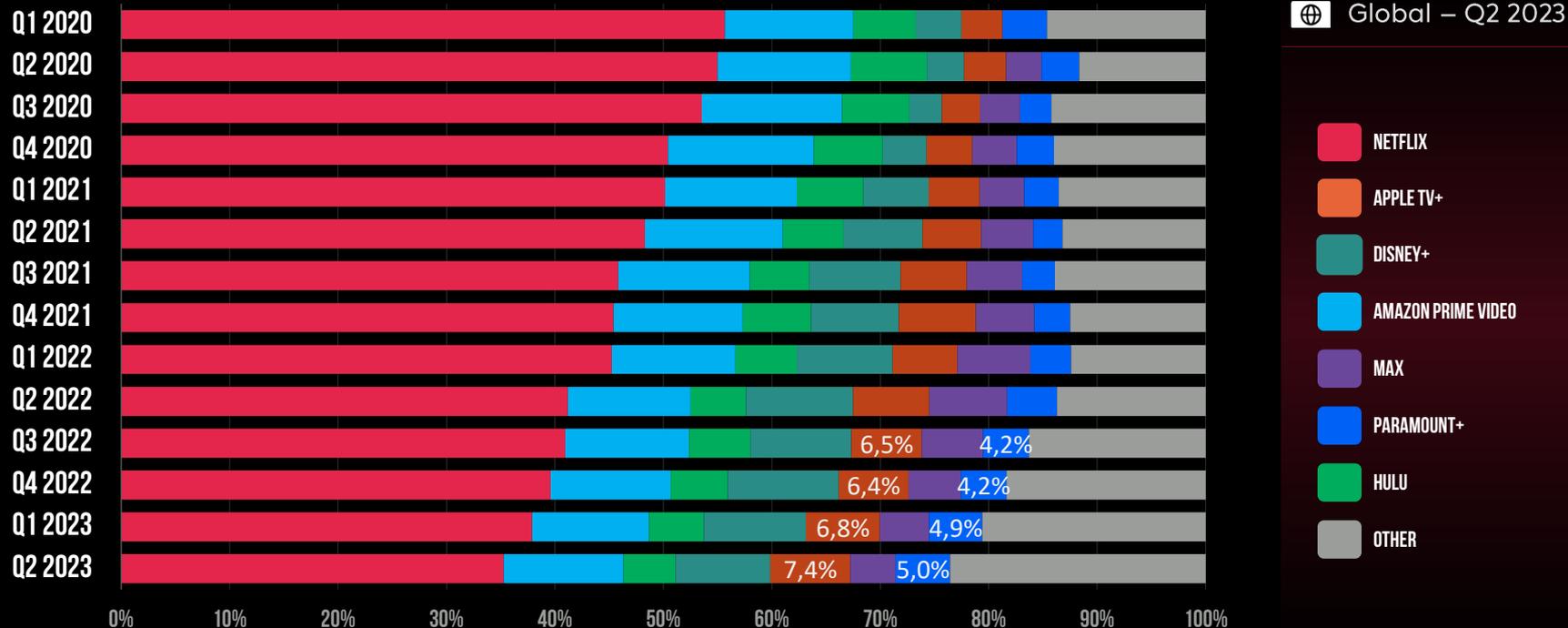
Global – Q2 2023



Share of Global Demand for Original Programming



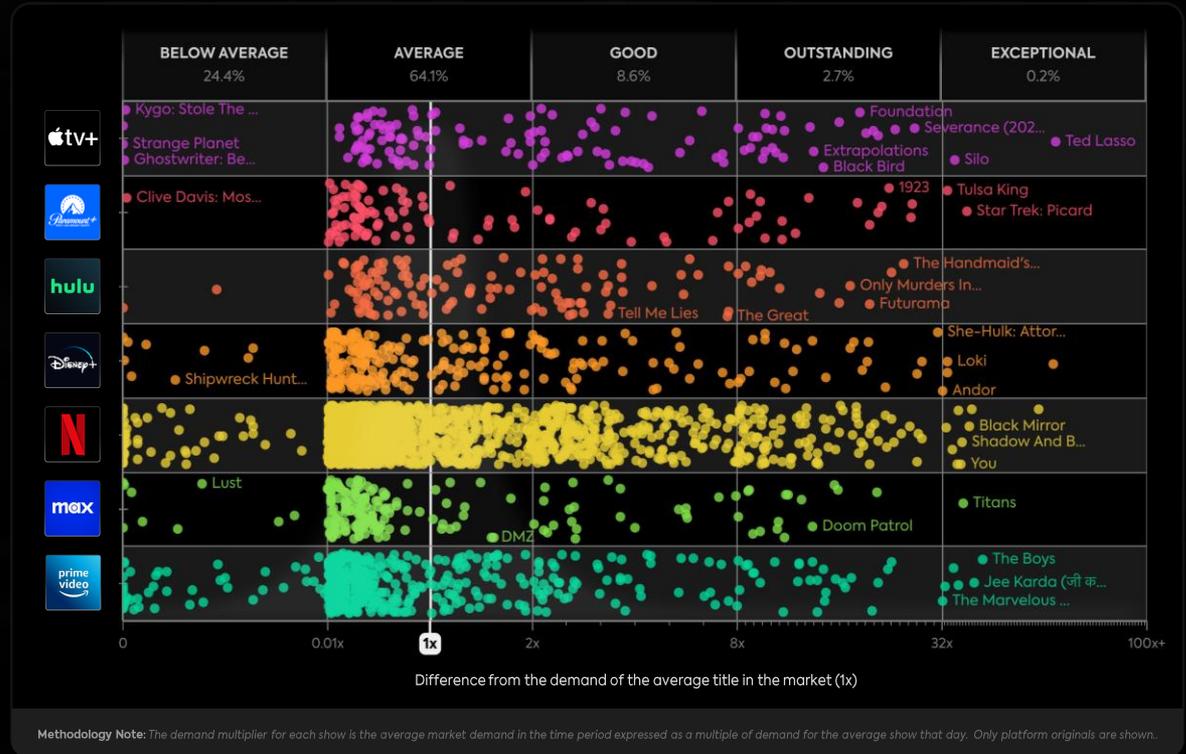
Share of Global Demand for Original Programming



Demand Distribution of Platform Originals

🌐 Global Demand for Platform Originals | April – June 2023

- Ted Lasso was the most in-demand streaming original of Q2 2023
- Franchise series rank at the top
- Sheer quantity of Netflix, Amazon output



Demand Distribution of Platform Originals

🌐 Global Demand for Platform Originals | April – June 2023

- Apple TV+ is leader in terms of the hit rate of its originals
- 1 in 5 Netflix originals had 2x or greater demand globally in Q2
- Despite high demand for top tier of Disney+ series, its hit rate lags Hulu, Paramount+

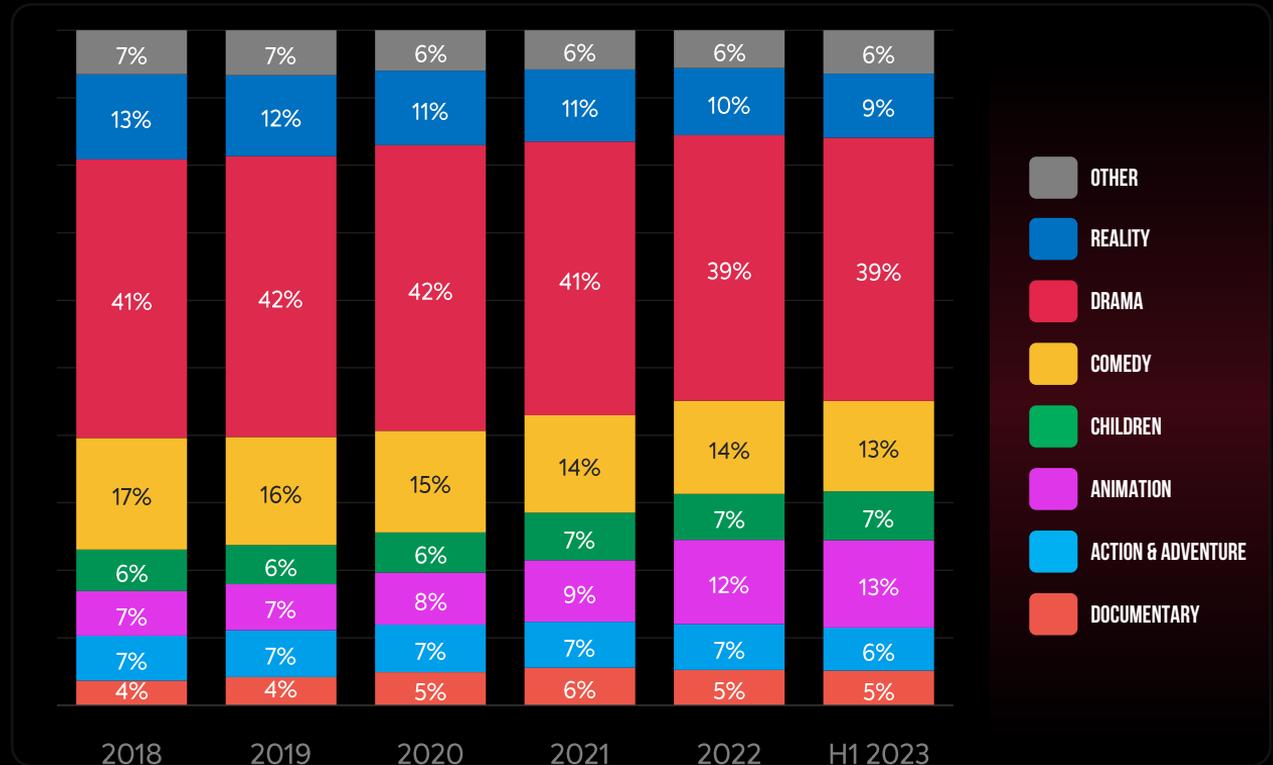


Interesting Insights



A 5 year look at the global share of demand by genre illustrates a shift in genre preferences over time

- Increases in share of demand since 2018 primarily from Animation
- The Documentary and Children genres experience marginal gains
- Decreases driven by Reality and Comedy



Most In-Demand Premieres of Q2 2023

🌐 Global demand for the top 10 shows in the first 30 days following release

| | Premiere Date | Market Multiplier (First 30 days post-premiere) | Platform |
|--|---------------|--|-------------|
| Secret Invasion  | June 21 | 102.4x | Disney+ |
| Citadel  | April 28 | 50.0x | prime video |
| The Idol  | June 04 | 44.2x | HBO |
| Hijack  | June 28 | 40.5x | Apple TV+ |
| Silo  | May 05 | 38.8x | Apple TV+ |
| Oshi No Ko  | April 12 | 37.4x | TOKYO MX |
| The Walking Dead: Dead City  | June 18 | 35.0x | AMC |
| Jee Karda  | June 15 | 33.1x | prime video |
| The Crowded Room  | June 09 | 32.8x | Apple TV+ |
| Queen Charlotte: A Bridgerton Story  | May 04 | 32.3x | NETFLIX |

Most In-Demand Premieres of Q2 2023

🌐 Global demand for the top 10 shows in the first 30 days following release

| | Premiere Date | Market Multiplier (First 30 days post-premiere) | Platform |
|--|---------------|--|-------------|
| Secret Invasion  | June 21 | 102.4x | Disney+ |
| Citadel  | April 28 | 50.0x | prime video |
| The Idol  | June 04 | 44.2x | HBO |
| Hijack  | June 28 | 40.5x | Apple TV+ |
| Silo  | May 05 | 38.8x | Apple TV+ |
| Oshi No Ko  | April 12 | 37.4x | TOKYO MX |
| The Walking Dead: Dead City  | June 18 | 35.0x | AMC |
| Jee Karda  | June 15 | 33.1x | prime video |
| The Crowded Room  | June 09 | 32.8x | Apple TV+ |
| Queen Charlotte: A Bridgerton Story  | May 04 | 32.3x | NETFLIX |

Most In-Demand Premieres of Q2 2023

🌐 Global demand for the top 10 shows in the first 30 days following release

| | Premiere Date | Market Multiplier (First 30 days post-premiere) | Platform |
|--|---------------|--|-------------|
| Secret Invasion  | June 21 | 102.4x | Disney+ |
| Citadel  | April 28 | 50.0x | prime video |
| The Idol  | June 04 | 44.2x | HBO |
| Hijack  | June 28 | 40.5x | Apple TV+ |
| Silo  | May 05 | 38.8x | Apple TV+ |
| Oshi No Ko  | April 12 | 37.4x | TOKYO MX |
| The Walking Dead: Dead City  | June 18 | 35.0x | AMC |
| Jee Karda  | June 15 | 33.1x | prime video |
| The Crowded Room  | June 09 | 32.8x | Apple TV+ |
| Queen Charlotte: A Bridgerton Story  | May 04 | 32.3x | NETFLIX |

Global Demand Report Markets



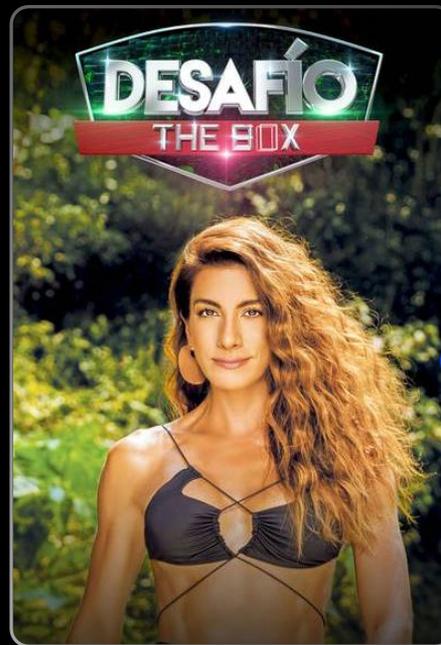
Local platforms winning around the world



Colombia



11.9%



Colombia



9.5%

Local platforms winning around the world



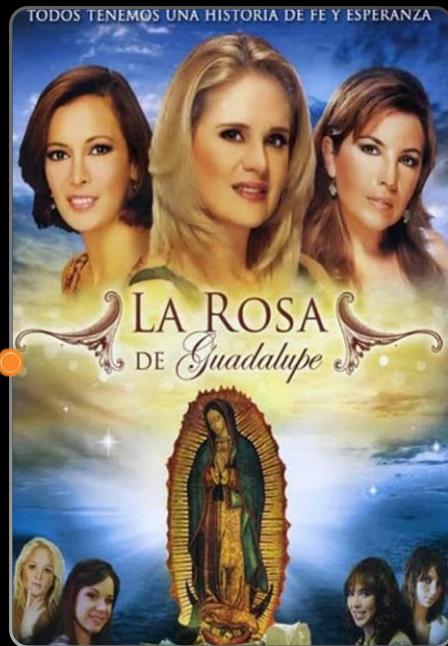
Local platforms winning around the world



Mexico



9.8%



Brazil



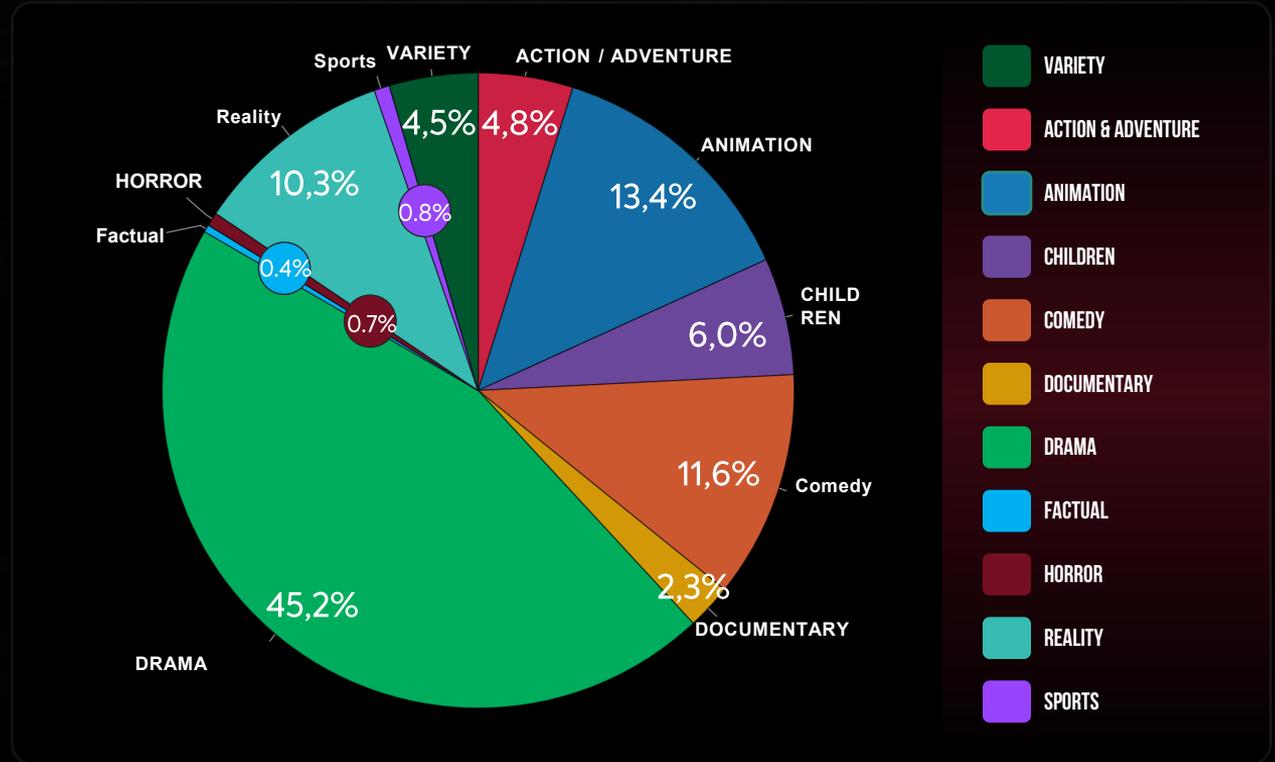
11.9%



Thai dramas dominating home market

 Genre demand share for all series | Thailand, Q2 2023

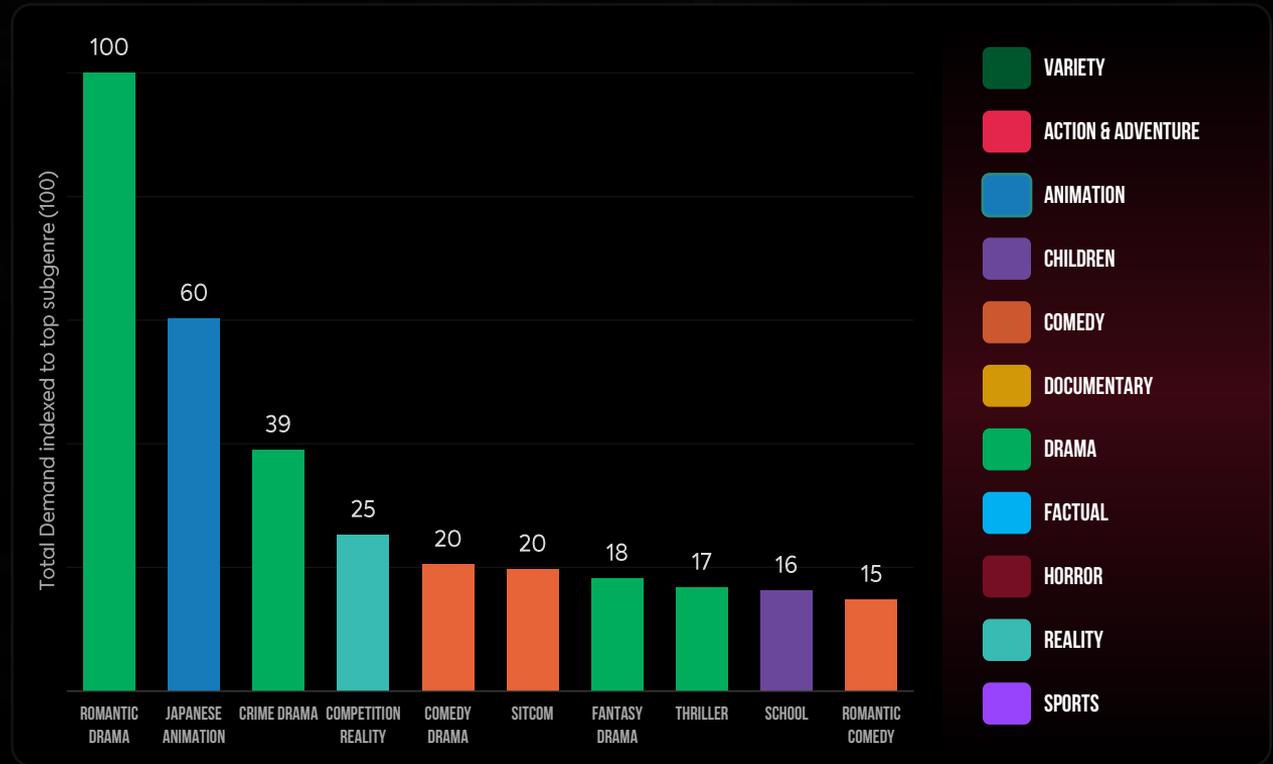
- Nearly half of demand for shows in Thailand was for a drama
- Most Drama loving market we covered



Thai dramas dominating home market

 The 10 most in-demand subgenres across all series | Thailand, Q2 2023

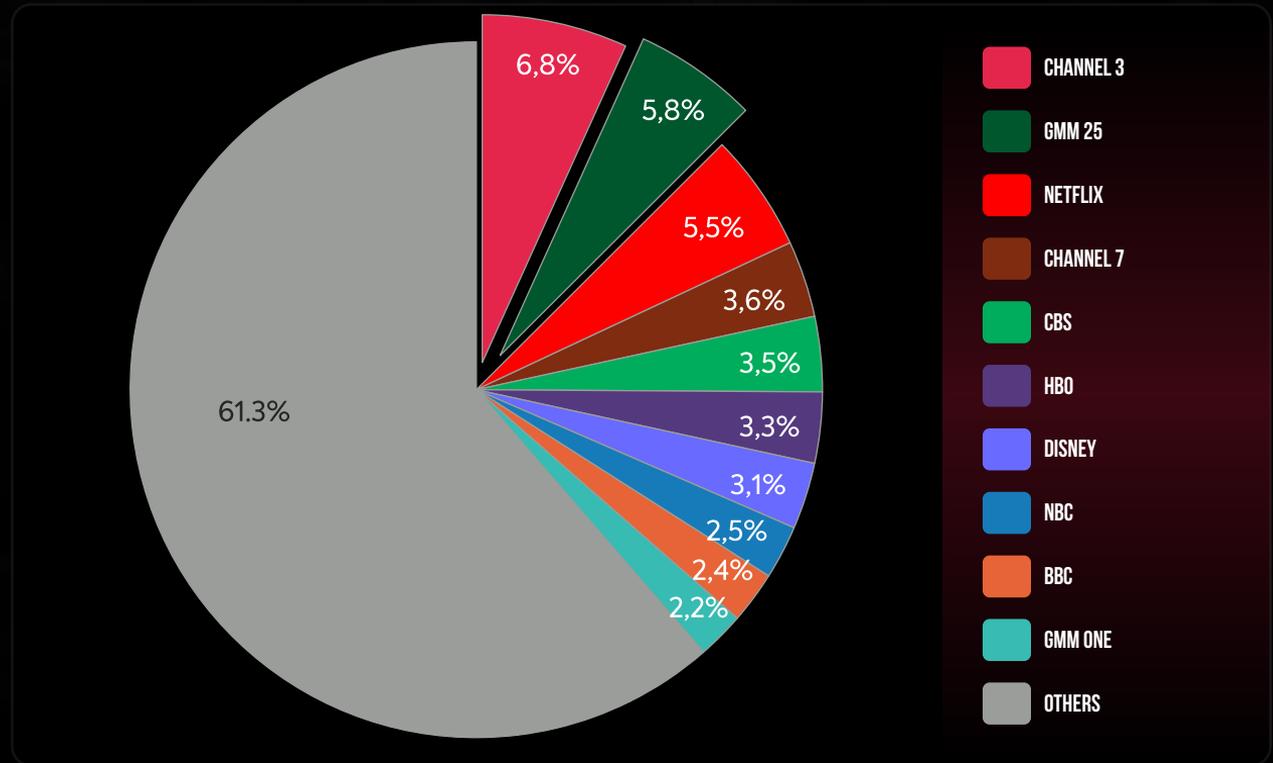
- Uniquely high demand for the romantic drama subgenre
- Romantic comedies also had high demand



Thai dramas dominating home market

 Market demand share by original platform for all series | Thailand, Q2 2023

- Driven by content from local channels
- Two channels had a larger demand for their original content than Netflix in Thailand



We see international streamers moving in



Thailand

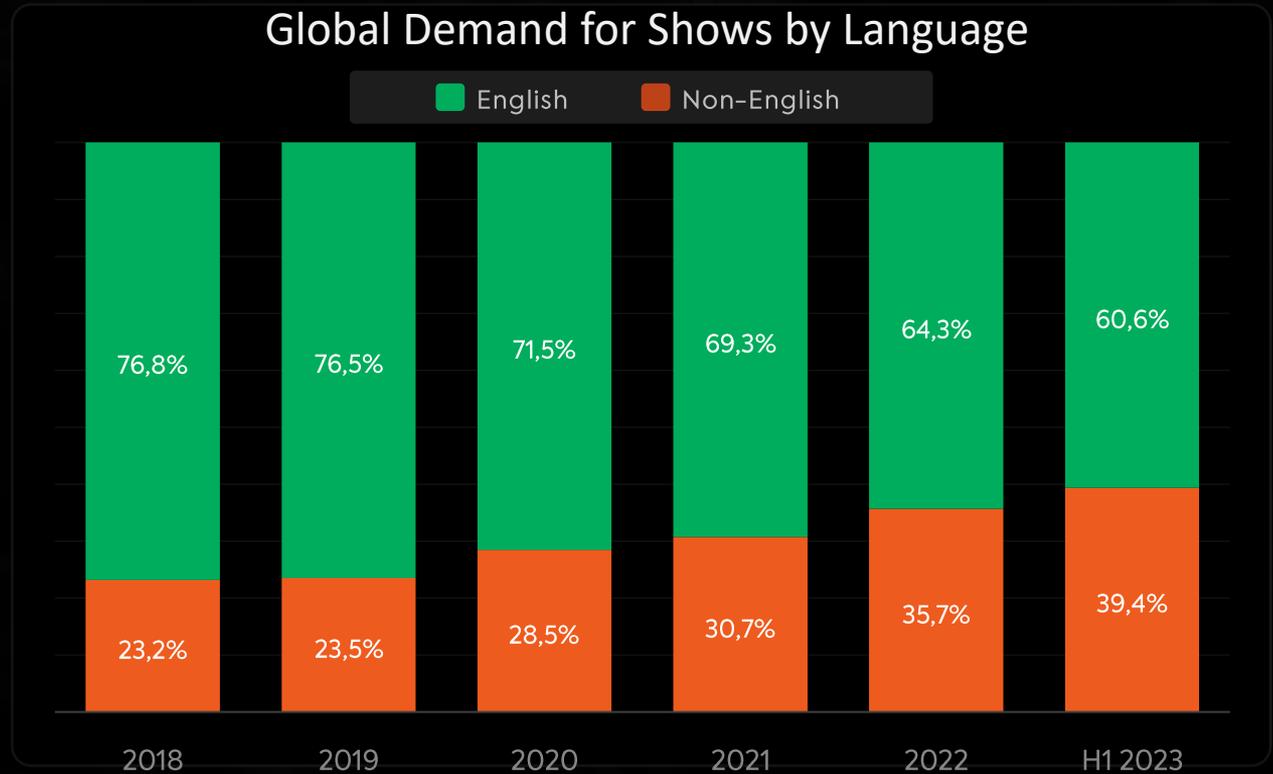


Demand: **18.2x**

- #2 most in-demand show for the quarter was a Thai series from Amazon Prime Video

But international content is continuing to catch on outside of home markets

- 2020 saw a shift in global demand towards more non-English series
- Trend has continued until today
- So far this year non-English series have accounted for nearly 40% of global demand



Turkey on the rise?



Portugal



Rank: #13



Colombia



Rank: #22



Austria



Rank: #37



Chile

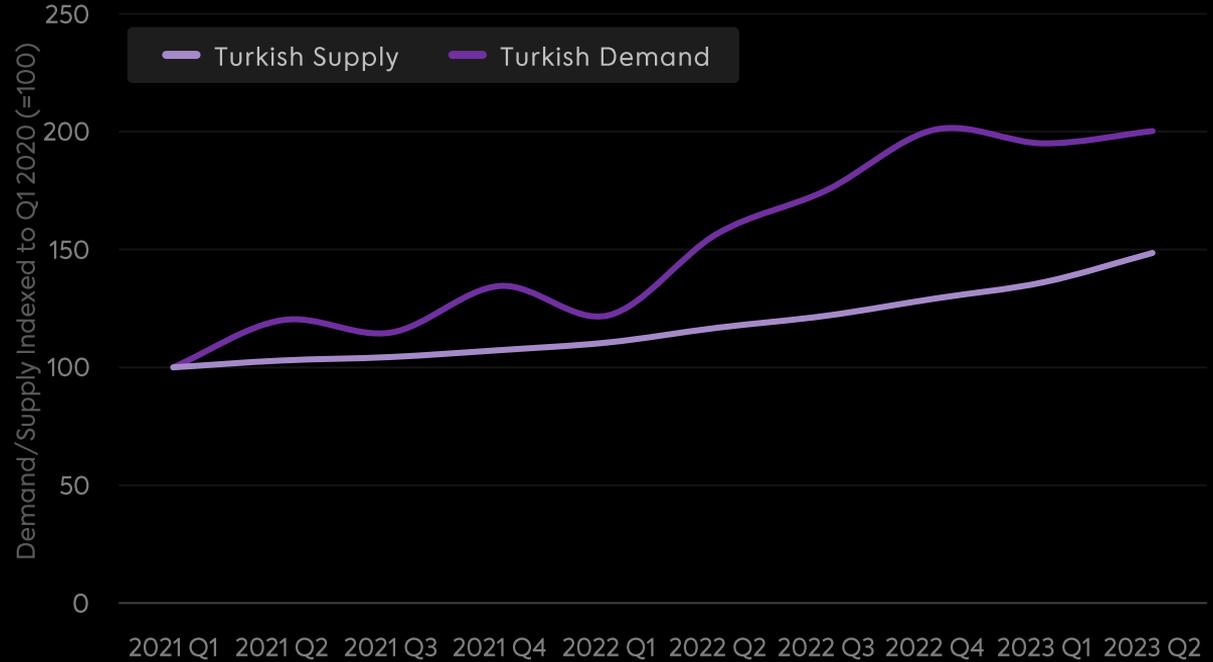


Rank: #58

US Demand for Turkish Series has Outpaced Supply

 Growth in Demand for Turkish Shows Outpaces Supply | Q1 2020 – Q2 2023

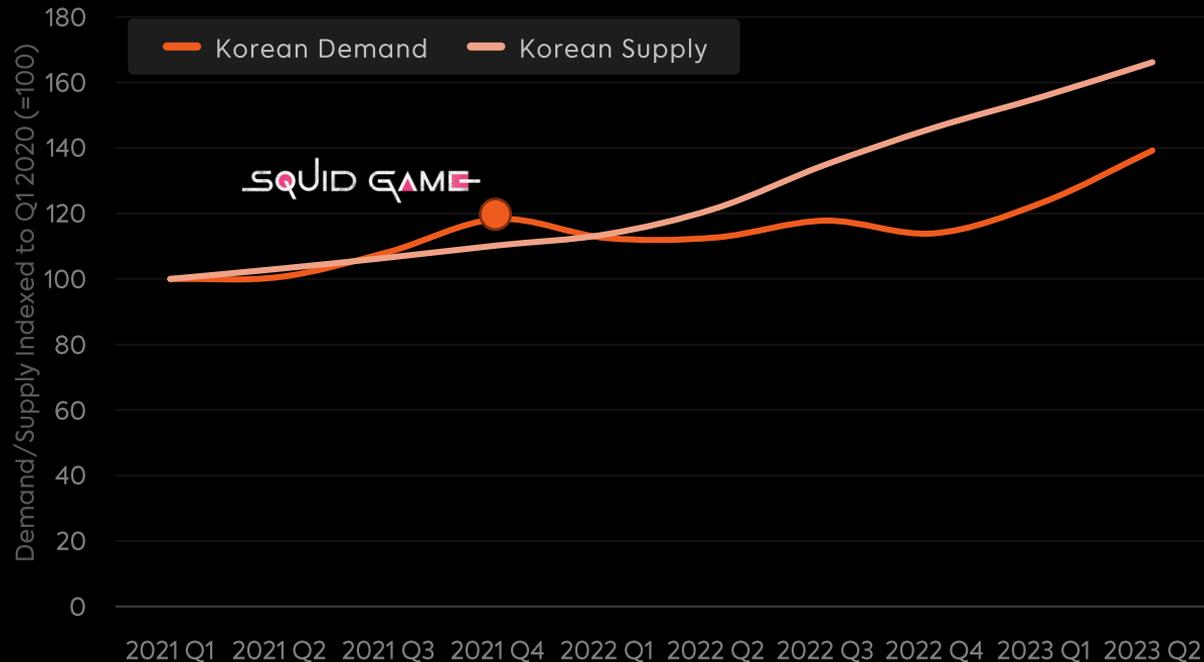
- Particularly strong growth in demand through 2022
- Growth in demand has outpaced supply growth



Contrast with Supply and Demand for Korean Series

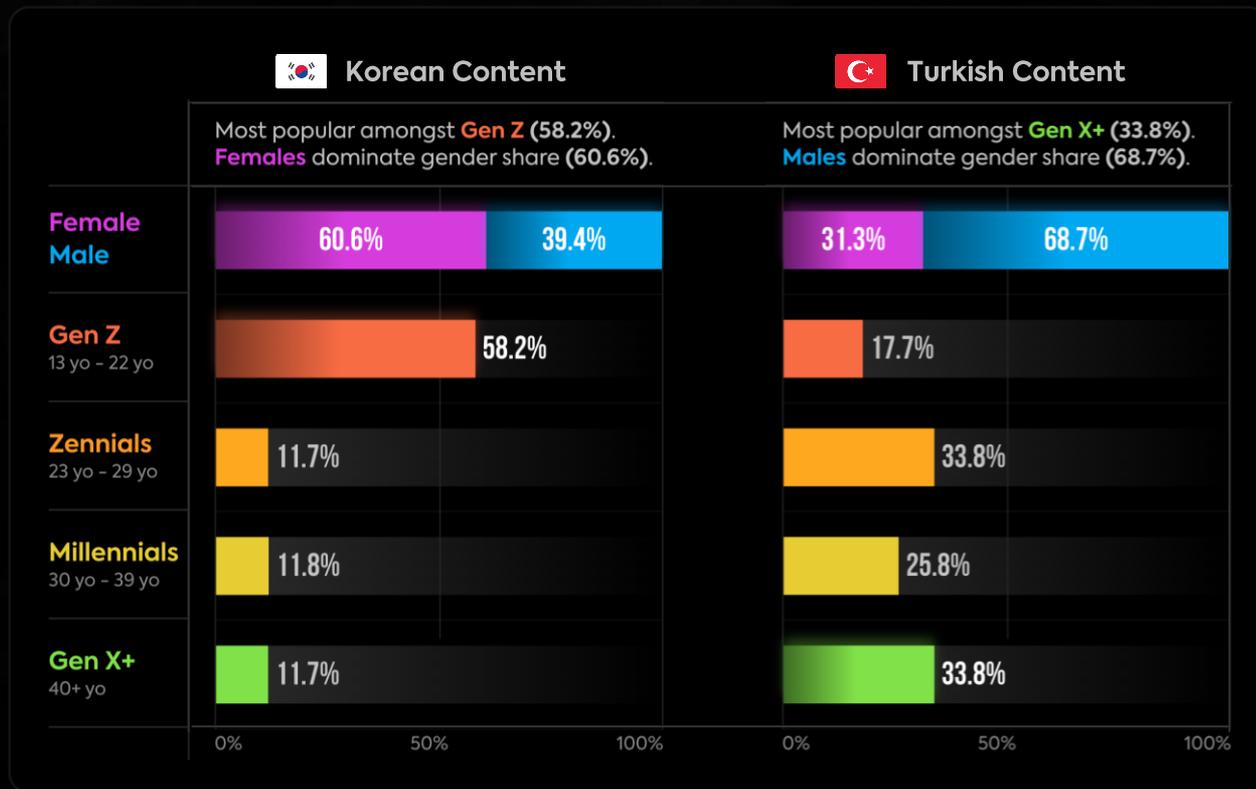
 Supply outpacing demand for Korean series | Q1 2020 – Q2 2023

- **Squid Game** represented a peak in demand for Korean content
- Number of series increased after, but demand did not follow
- Recent uptick in demand this year



Turkish And Korean Content have different Global Audiences

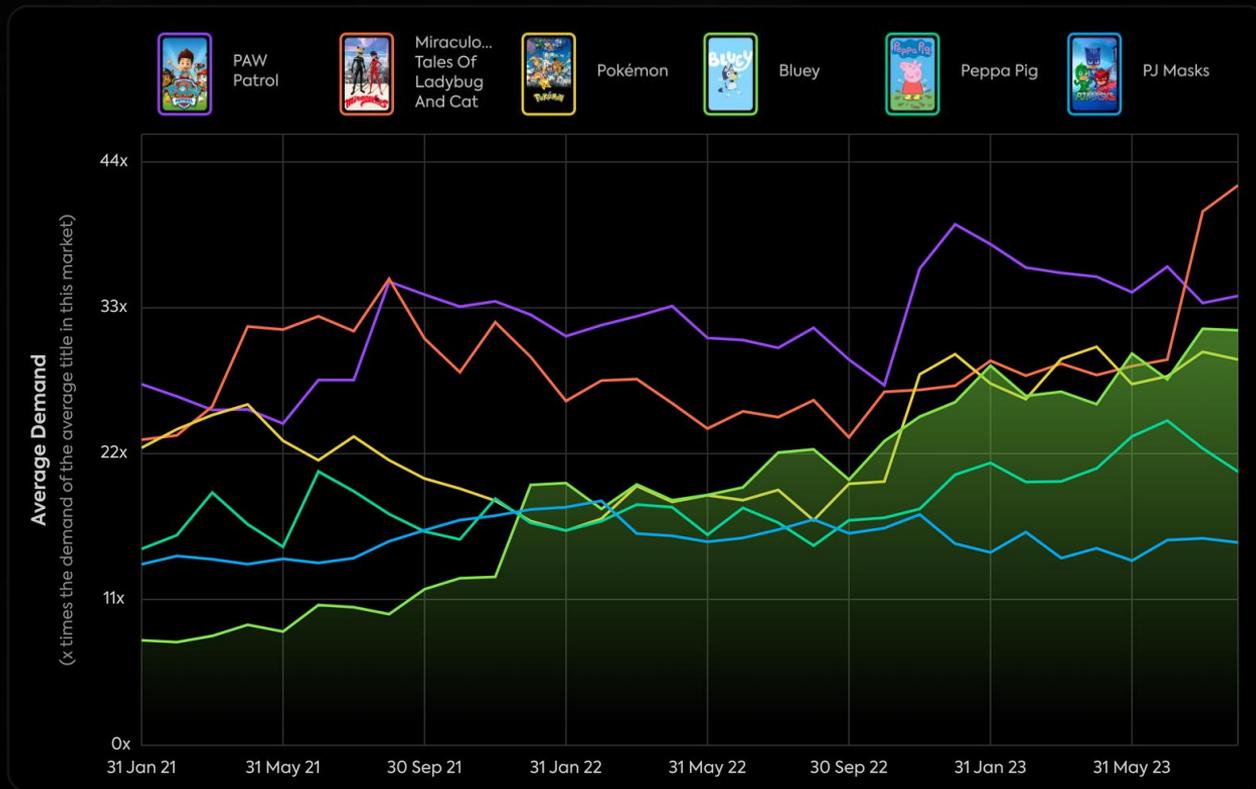
- Global Audience for Korean series dominated by Gen Z and skews Female
- Over 40 age group is the largest for Turkish shows and Men make up nearly 70% of the audience for these shows



Americans are discovering Australian content

 Most In-Demand Non-US Kids Series | January 2021 – August 2023

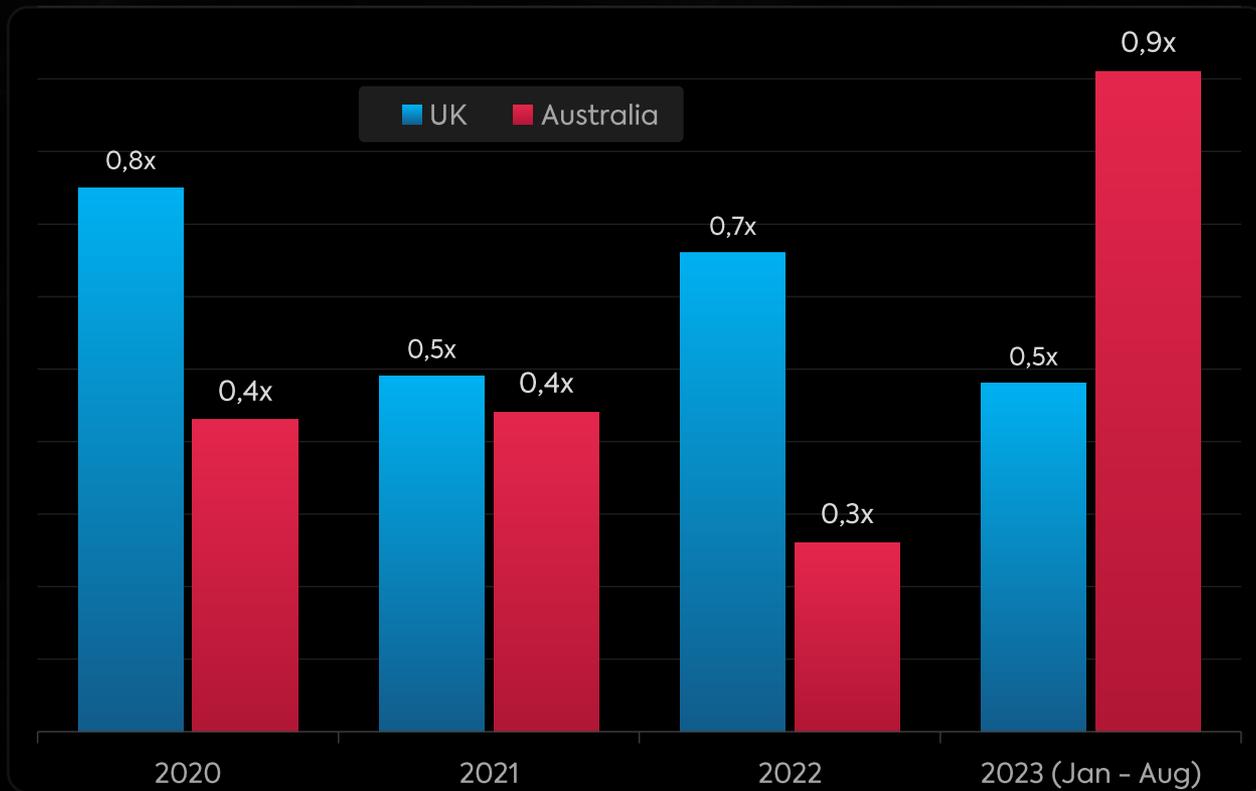
- International kids content finding success in the US
- Multi year trend of growing demand for Bluey



Americans are discovering Australian content

 Average US Demand for new British & Australian series premiering each year | Jan 2020 – Aug 2023

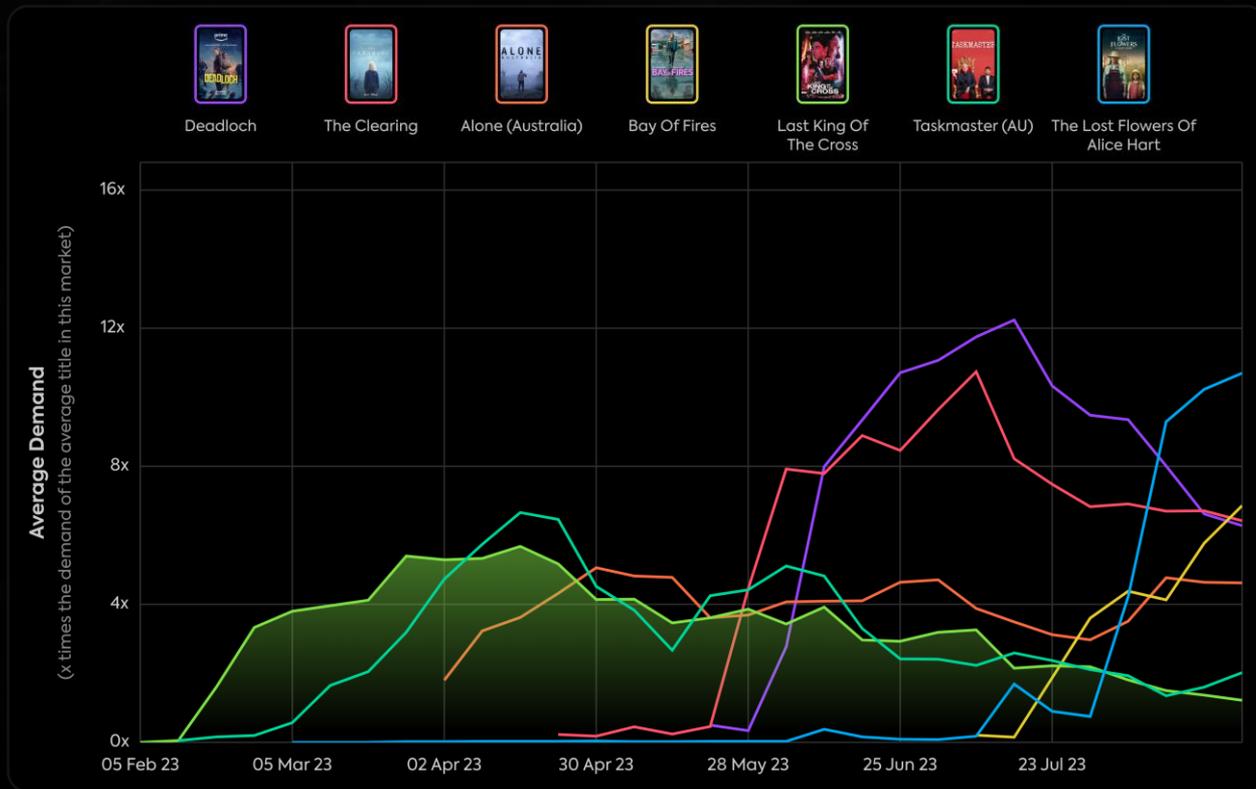
- Big jump in average US demand for Australian shows released this year
- First year where average demand for Aussie releases has beat British series in the US



But it isn't just Bluey...

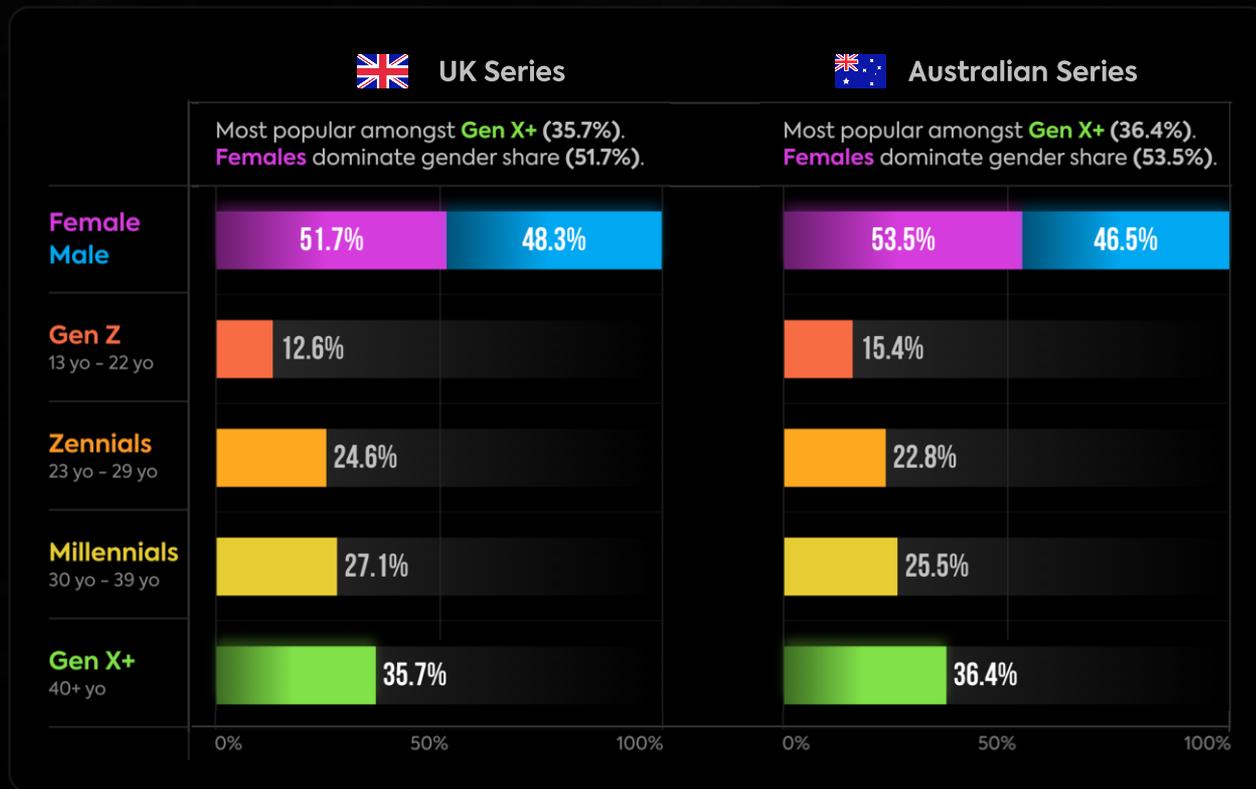
 US Most In-Demand Australian Series to Premiere this year | January – August 2023

- Multiple new Australian shows have premiered this year with high demand in the US



Global Audience for UK and Australian shows is similar

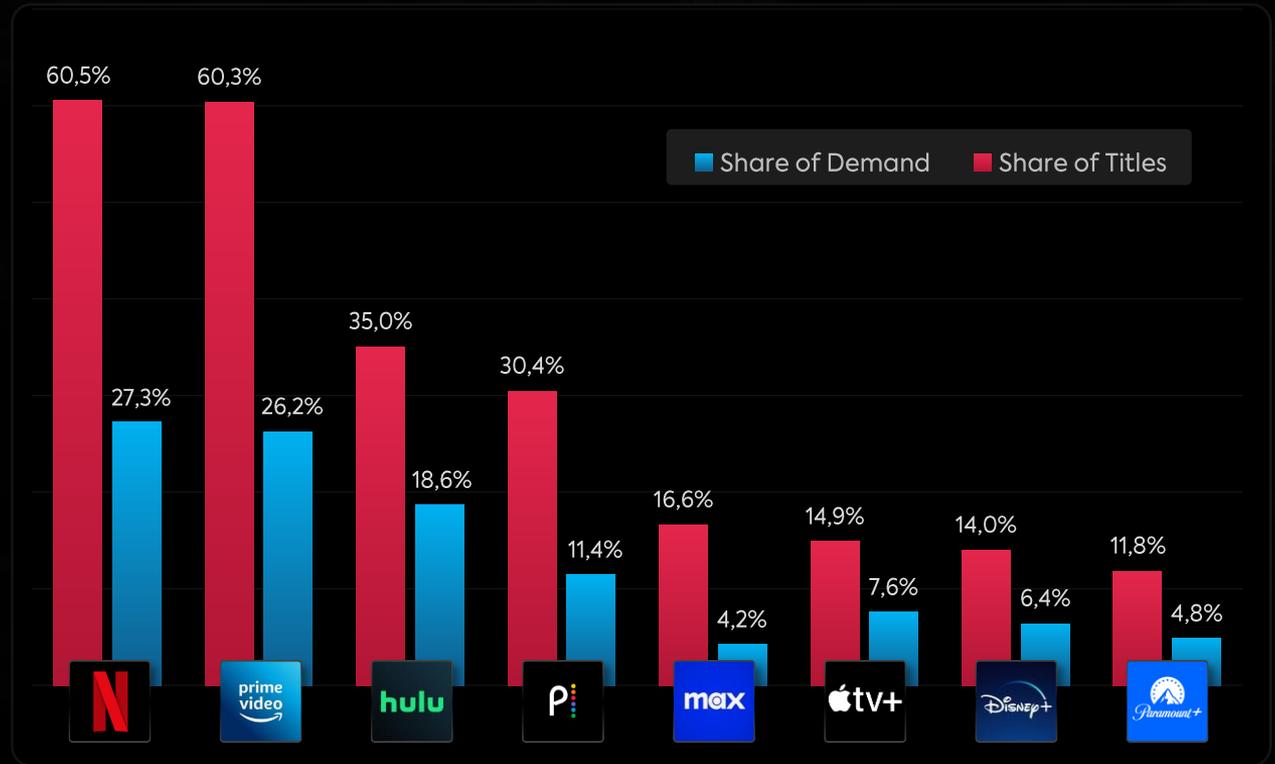
- Audiences for Australian and British content are relatively evenly split between men and women
- Both tend to have a majority of their audience from the over 40 age group



Which US Platforms have the most international content?

 Share of Titles vs. Demand for Non-US Series on Platform | June 2023

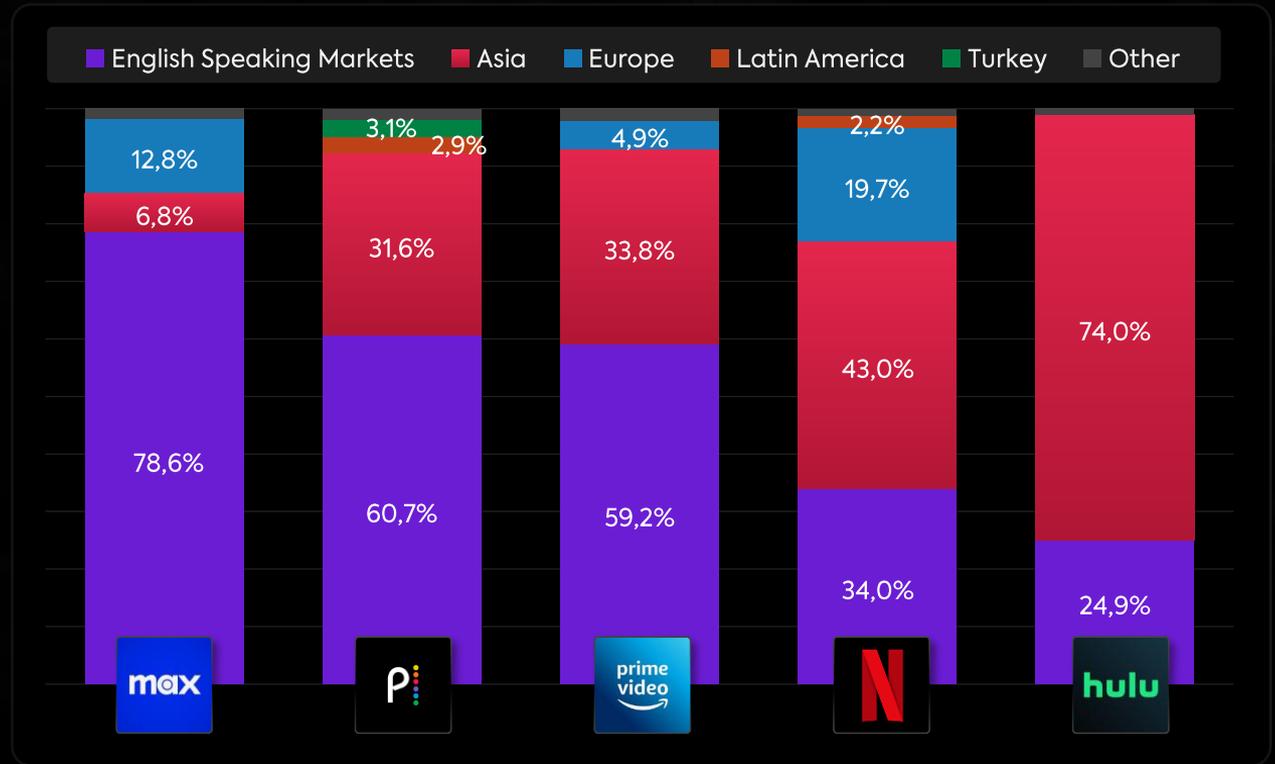
- If strike continues to halt domestic production, platforms could leverage international content
- Netflix and Amazon lead in terms of international content available to US subscribers



Different Approaches to International Programming

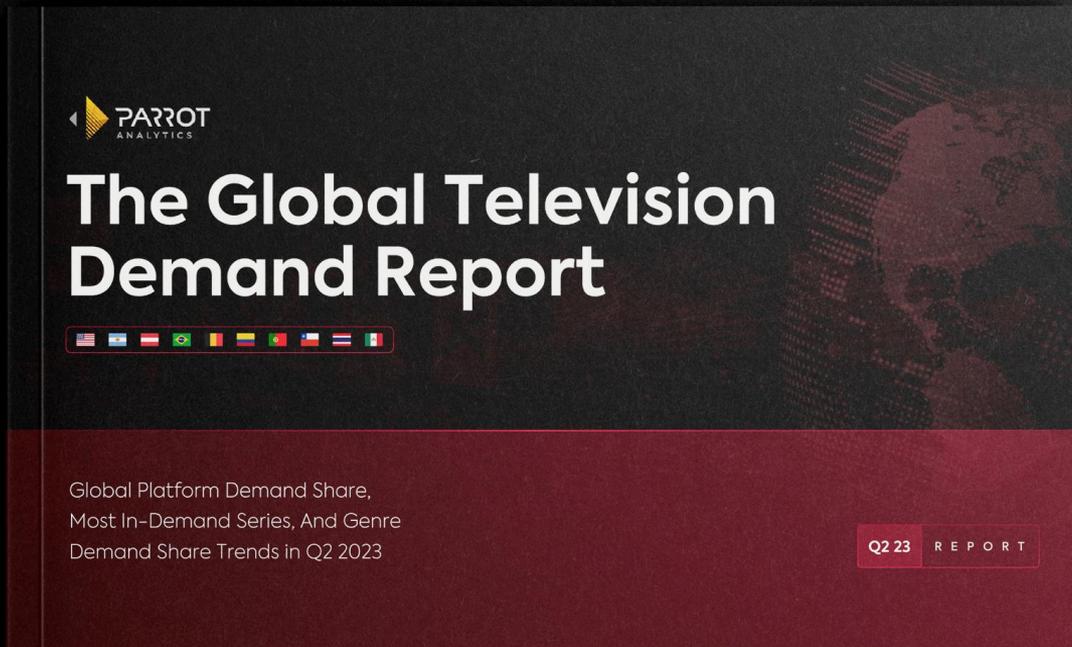
 Share of On-Platform Demand for Non-US Shows | June 2023

- Max has the largest demand share for its non-US English language content
- Majority of Hulu's international demand comes from Asia – Anime on its “Animayhem” hub
- US demand for Netflix's international content is spread most evenly across regions



Global TV Demand Report Q2 2023

If you want a deep dive on 10 markets find the full report on Demand360

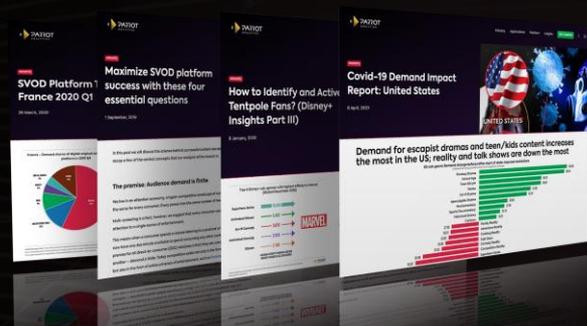


DEMAND360 LITE

| Rank | TV Shows | Average Demand | Change in Rank | Gender | Generation | Year | Original Network | Origin |
|------|-----------------------|-----------------------|----------------|-----------------|----------------------|------|------------------|--------|
| 1 | Adventure Time | 78.46x EXCEPTIONAL | 0 = | 50.9% FEMALE | 50.9% GEN Z | 2010 | Cartoon Network | US |
| 2 | Ahsoka | 69.59x EXCEPTIONAL | +1 A | 69.8% MALE | 34.4% MILLENNIALS | 2023 | Disney+ | US |
| 3 | Spongebob Squarepants | 64.4x EXCEPTIONAL | 0 = | 55.8% FEMALE | 50.6% TENNNIALS | 1999 | Nickelodeon | US |
| 4 | Game Of Thrones | 61.24x EXCEPTIONAL | 0 = | 50.4% MALE | 39.2% TENNIALS | 2011 | HBO | US |
| 5 | The Simpsons | 59.7x EXCEPTIONAL | -1 T | 60.7% MALE | 34.7% MILLENNIALS | 1989 | FOX | US |
| 6 | Sesame Street | 55.45x EXCEPTIONAL | +2 A | 58% FEMALE | 33.6% GEN X | 1969 | FBS | US |
| 7 | One Piece | 53.69x EXCEPTIONAL | +6 A | 72.5% MALE | 49.2% GEN Z | 2023 | Netflix | US |
| 8 | My Hero Academia | 50.93x EXCEPTIONAL | +1 A | 63.2% MALE | 65.6% GEN Z | 2016 | YTV | JP |
| 9 | The Walking Dead | 50.83x EXCEPTIONAL | -1 T | 50.7% FEMALE | 28.9% MILLENNIALS | 2010 | AHC | US |
| 10 | Stranger Things | 50.27x EXCEPTIONAL | +1 A | 57.2% FEMALE | 32.2% GEN Z | 2016 | Netflix | US |
| 11 | South Park | 47.22x EXCEPTIONAL | +4 A | 65.5% MALE | 29.7% MILLENNIALS | 1997 | Comedy Central | US |

Why get DEMAND360 LITE ?

- Rank 25,000+ TV Shows, 15,000+ Movies and 20,000+ Talent in 50+ Markets and worldwide.
- See the top 20 shows for each platform and its genres.
- Get access to comprehensive TV analytics.
- Stay on top of global TV market and SVOD trends.
- Learn from exclusive reports and whitepapers.
- Save time with one curated feed of TV industry news.



30% discount for webinar attendees!

Monitor global content trends across 100+ platforms for 25,000+ TV shows, 15,000+ Movies and 20,000+ Talent in 50+ Markets and gain access to exclusive reports and analyses.

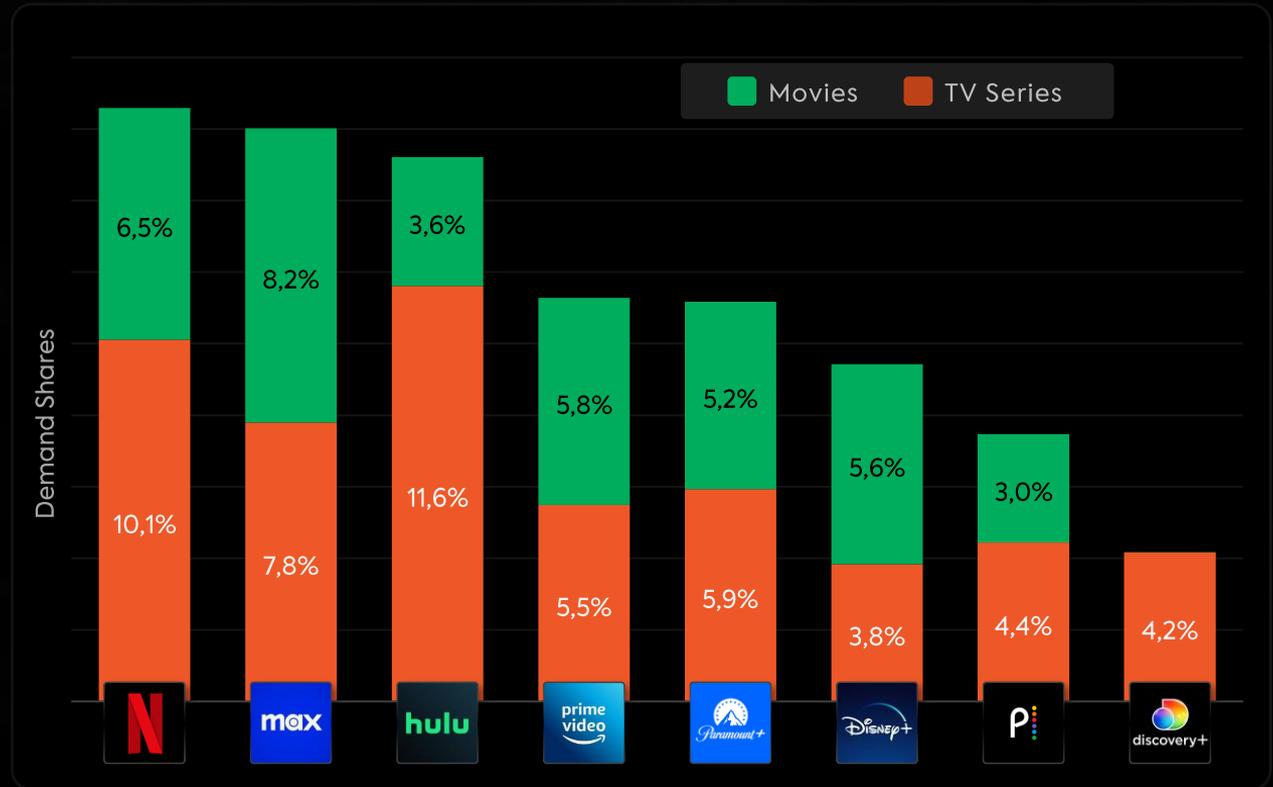
DEMAND360 LITE trusted by:



How do different services stack up?

 Total Catalog (TV + Movies) Demand Share | Q2 2023

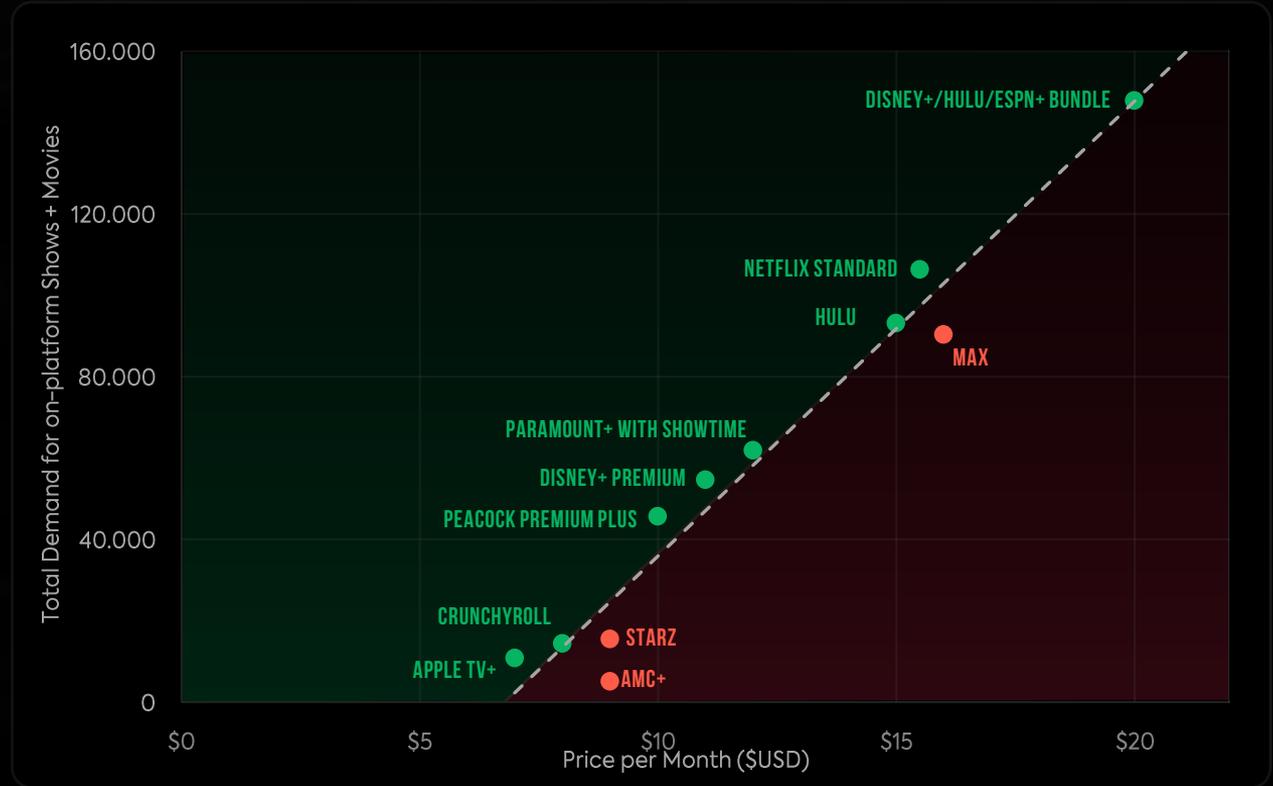
- Clear 3-way race in the US considering total catalog demand
- Hulu leads in series; HBO Max Movies; Netflix Overall
- Bundling threatens Netflix's lead here



What platforms are competitively priced?

🇺🇸 Platform Movie + TV Demand vs. Monthly Cost | United States, July 2023, Ad-free tiers

- Clear Relationship between total platform demand and subscription price
- Even most expensive bundle is priced competitively for the amount of in-demand content it provides
- Max may struggle to raise prices without adding to its catalog



Thank You

For questions please contact:

Christofer Hamilton

christofer.hamilton@parrotanalytics.com

