



The Global Television Demand Report

Global SVOD platform demand share, digital original series popularity and genre demand share trends in 2018

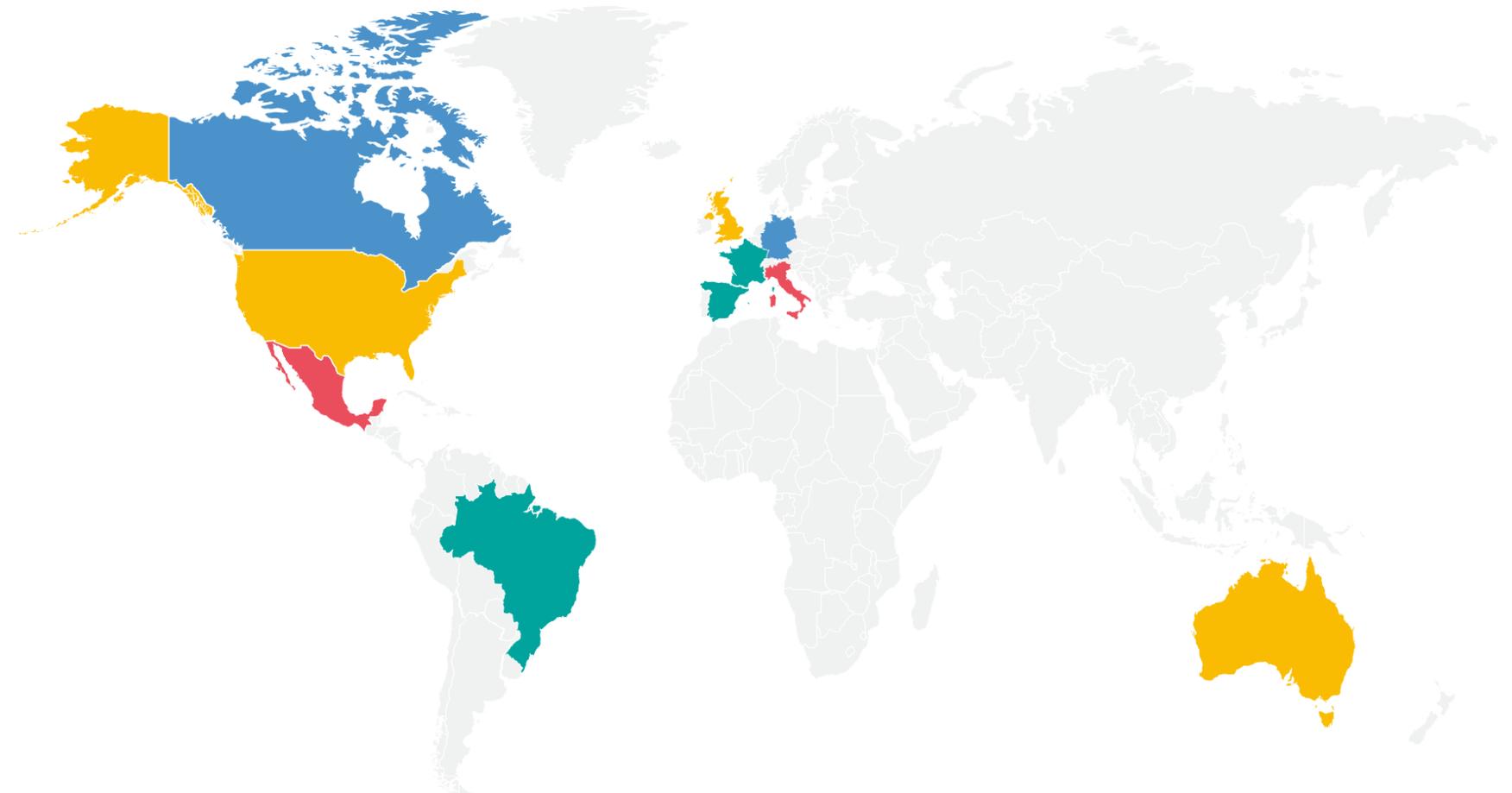
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- SOCIAL
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- TRAVELABILITY
- BRAND ○
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- TIME ○
- DEMAND
- TRENDS
- DEMOGRAPHICS
- SENTIMENT
- RECOMMENDATIONS
- DISCOVERY



Executive Summary

January – December, 2018

- ▶ 2018 has once again been a **tremendous year of growth for SVOD platforms** in terms of the global audience demand for their original content, the number of new series they have launched, the investment growth into new digital originals and the resulting increase in subscribers.
- ▶ **In 2018 SVOD platforms have released a combined 300+ new digital originals**, over 130 of these premiered on Netflix alone.
- ▶ The platforms' content investments are certainly leading to results: Having committed USD 12 billion in 2018 alone, **Netflix now commands 71% of the global SVOD market with its digital originals**. The service has maintained a platform market demand share of no less than 65% in each of the 10 markets profiled in this report.
- ▶ The digital original series that are number one in the most markets in this report are jointly *Chilling Adventures of Sabrina* and *La Casa De Papel*, both of which have the highest demand in 2018 across three out of ten markets. Other world-class series for 2018 include *Star Trek: Discovery* and *Stranger Things*, topping two markets each.
- ▶ This report also demonstrates that **Netflix continues to attract the most demand** for its drama and action/adventure digital originals in all ten territories profiled. However, our OTT market share trend analysis reveals that the launch of new services have started to impact the platform demand share of the existing players.
- ▶ For example, **DC Universe has gained significant SVOD platform demand share in the action/adventure genre** towards the end of 2018.
- ▶ 2019 will once again be a year of change with new offerings from Apple and Disney delighting consumers with more entertainment choices than ever.



Chilling Adventures of Sabrina

- ▶ United States
- ▶ Australia
- ▶ United Kingdom



La Casa De Papel (Money Heist)

- ▶ Brazil
- ▶ France
- ▶ Spain



Star Trek: Discovery

- ▶ Canada
- ▶ Germany



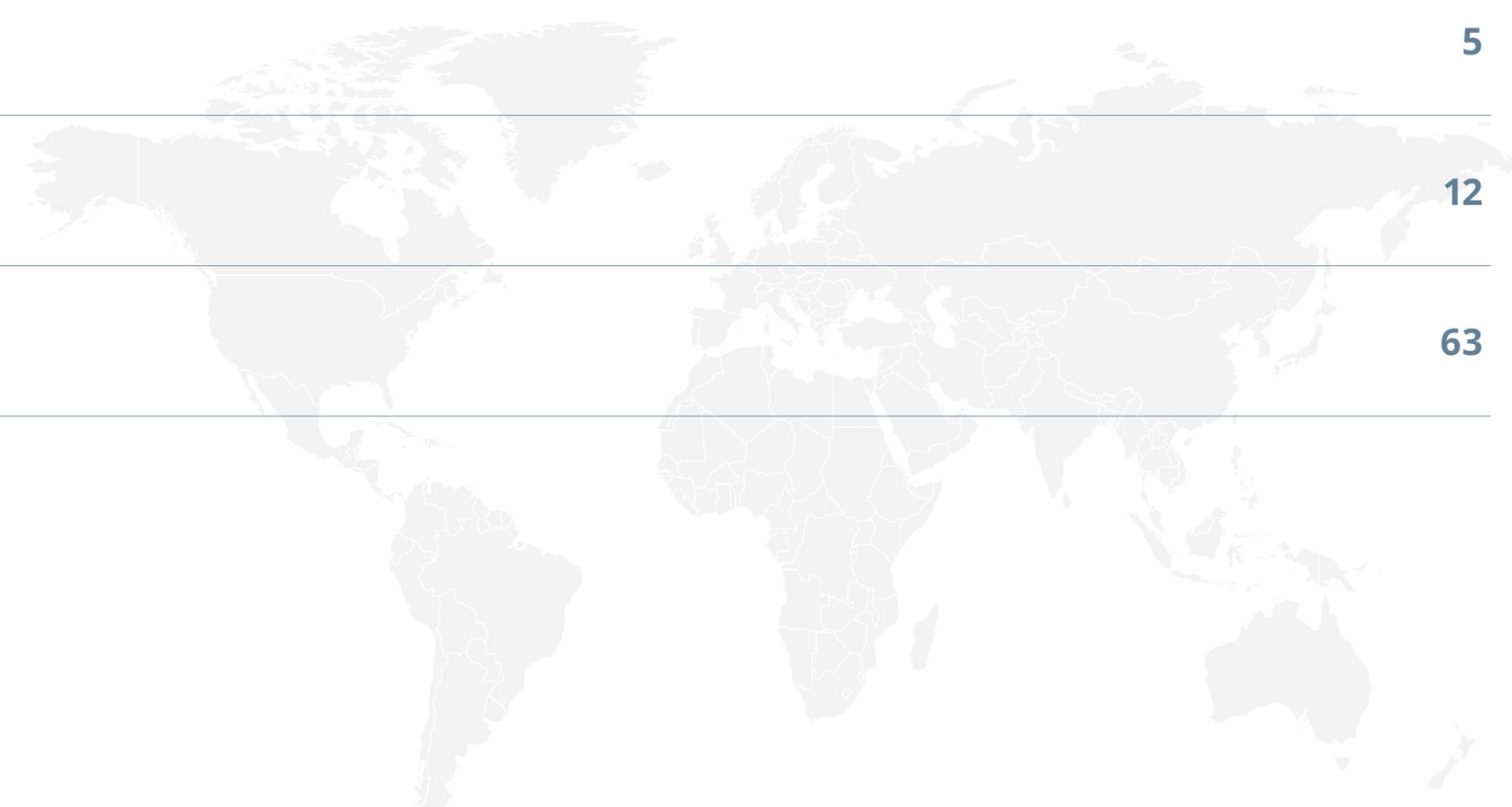
Stranger Things

- ▶ Italy
- ▶ Mexico

Contents

January – December, 2018

Introduction	4
Global SVOD platform trends	5
Market-specific platform and content trends	12
Appendix: The global demand measurement standard	63



Introduction

January – December, 2018

Demand as the new paradigm

In this latest edition of [Parrot Analytics' Global Television Demand Report](#), the SVOD platform demand share of digital originals, the global genre share as well as an individual analysis of key global markets was carried out. In addition, we are pleased to share with you once again the top digital original series of the year, representing the original content produced by SVOD platforms around the world. As these titles can play a key role in the success of these platforms, but their viewership numbers are kept a closely-guarded secret, the purpose of this report is to provide the industry with insights into the global and market-specific demand for these shows, backed by empirical data for the first time.

With the rapid proliferation of content distribution platforms and the unprecedented levels of consumer fragmentation, existing measurement services in the industry are falling increasingly short around the globe.

The solution to the industry's difficulty in navigating the cross-platform fragmentation is through measuring global content demand. Demand for content is what drives consumption on all platforms — linear and OTT alike.

Consumers express their demand for content through multiple “demand expression platforms” including video streaming platforms, social media platforms, photo sharing platforms, blogging and micro-blogging platforms, fan and critic rating platforms, peer-to-peer protocols and file sharing platforms. Parrot Analytics captures the expressions of demand from these sources and combines them, using the power of advanced artificial intelligence, into a single weighted measure of demand called Demand Expressions.

This global industry standard demand metric enables Parrot Analytics to wield the industry's most powerful TV metric linking consumers and content across the globe.

Using Demand Expressions, a vast array of analyses become possible. Demand is country-specific,

meaning that the differences in demand for content between markets can be empirically measured **even if that content has not yet been officially released in that market.**

Demand is also platform-agnostic: While performance metrics may be available for certain titles on linear TV, **Parrot Analytics' Demand Expressions metric reaches all content**, from the popular broadcast programs to obscure cable titles, to SVOD digital original series, on which very little data has been released.

Knowing the demand for all this content **allows for empirical content acquisition, licensing, marketing and advertising decisions to be made**, with a full picture of the state of content demand in any given market.

In an industry traditionally guided by intuition and gut feelings, gaining insights into the actual demand for content, no matter the platform or market, is a definite **competitive advantage.**

[Download](#) *Parrot Analytics' comprehensive whitepapers, industry analyses and global TV demand case studies.*



Global SVOD platform trends

Global SVOD investment, subscribers, production and platform demand share trends

The growth of SVOD platforms has been significant. **Tens of billions of dollars have been invested in digital original content**, resulting in the number of digital original series to increase exponentially year on year.

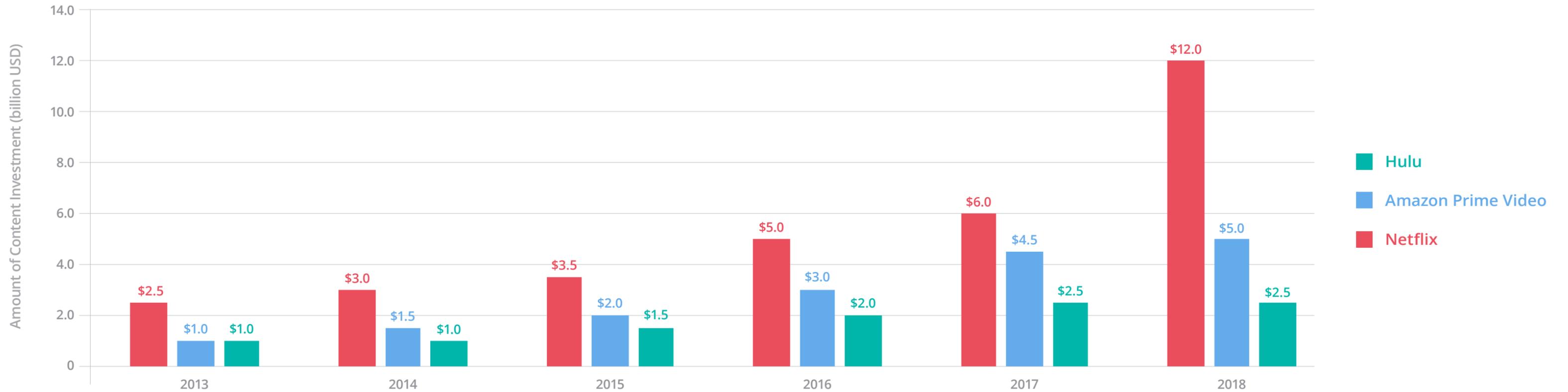
Consequently, platform subscriptions have also grown, driven as always by the promise of the next season installment of the current series favorites, as well as **the next mega hit**.



Increase in global SVOD content investment

2013 – 2018 | SVOD Content Investment

Content investments by major US SVOD platforms



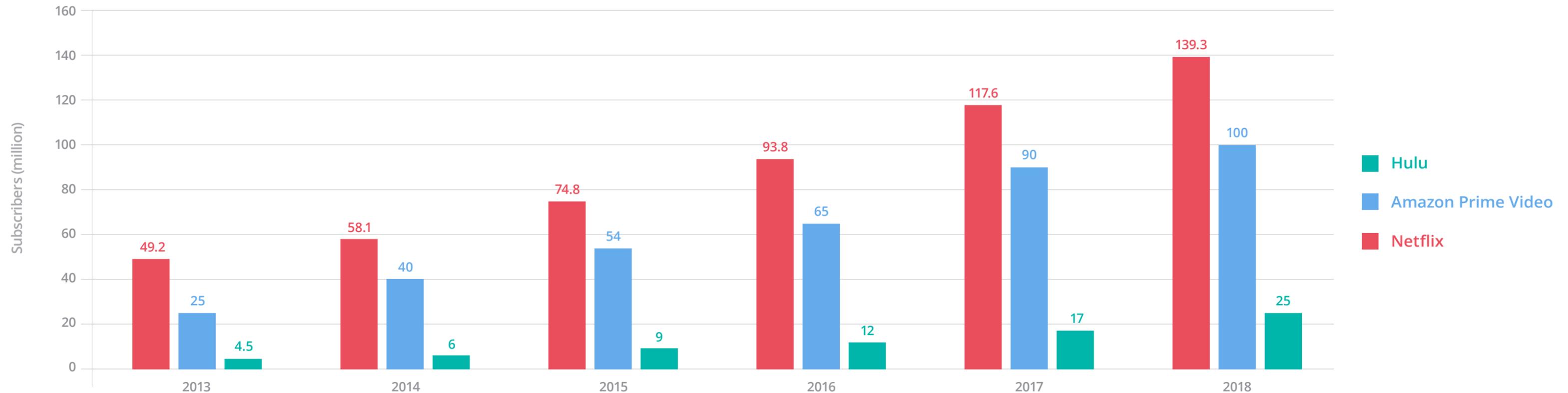
- ▶ Together, the three largest US SVOD services have invested an estimated USD 19.5 billion in content creation and licensing during 2018.
- ▶ In 2013, the combined content spend was USD 4.5 billion, so content spending from just these three services has more than quadrupled in the past 6 years.
- ▶ At the start of 2018, the estimate for Netflix’s content spend was USD 8 billion; at USD 12 billion the actual 2018 spend exceeded that by 50%.

- ▶ Analysts have forecast the Netflix 2019 content budget to potentially be as high as USD 15 billion.
- ▶ The best estimate for Amazon’s 2018 content spend is USD 5 billion, a small increase from their 2017 spend.
- ▶ Hulu, in turn, invested an estimated USD 2.5 billion on content in 2018, a figure unchanged from their 2017 spend.

Increase in global SVOD subscribers

2013 – 2018 | SVOD Subscribers

Number of global subscribers for major US SVOD platforms



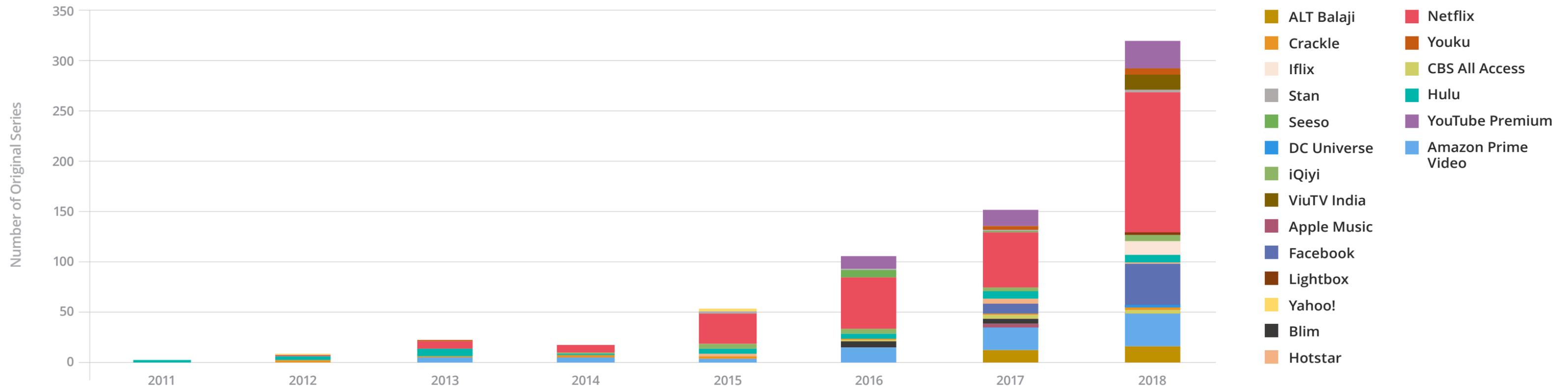
- ▶ Netflix remains the largest streaming platform on the planet, reporting nearly 140 million international subscribers in their Q4 quarterly statement.
- ▶ Amazon does not release exact numbers for Prime subscribers, but in April 2018 CEO Jeff Bezos announced Amazon had over 100 million international subscribers. However, Amazon has not given any indications of how many Prime subscribers utilize Prime Video.
- ▶ Hulu is presently only available in the United States and Japan, so it naturally has a smaller subscriber base due to the much smaller addressable market.

- ▶ Disney CEO Bob Iger has spoken of “global growth” plans for Hulu after the Fox merger is complete and Disney becomes Hulu’s majority owner.
- ▶ Amazon increased the price of a US Prime subscription in Q2 to USD 119 from USD 99. Unfortunately, we have no information on whether this change affected Prime Video usage.
- ▶ Netflix increased the price of all US plans by at least one US dollar in January 2019 while Hulu decreased the price of its basic plan to USD 6 from USD 8. The effects of these changes, if any, will be observable in the coming quarters.

Increase in global digital originals

2011 – 2018 | Digital Original Series by Original Network

Number of new digital original series released by year

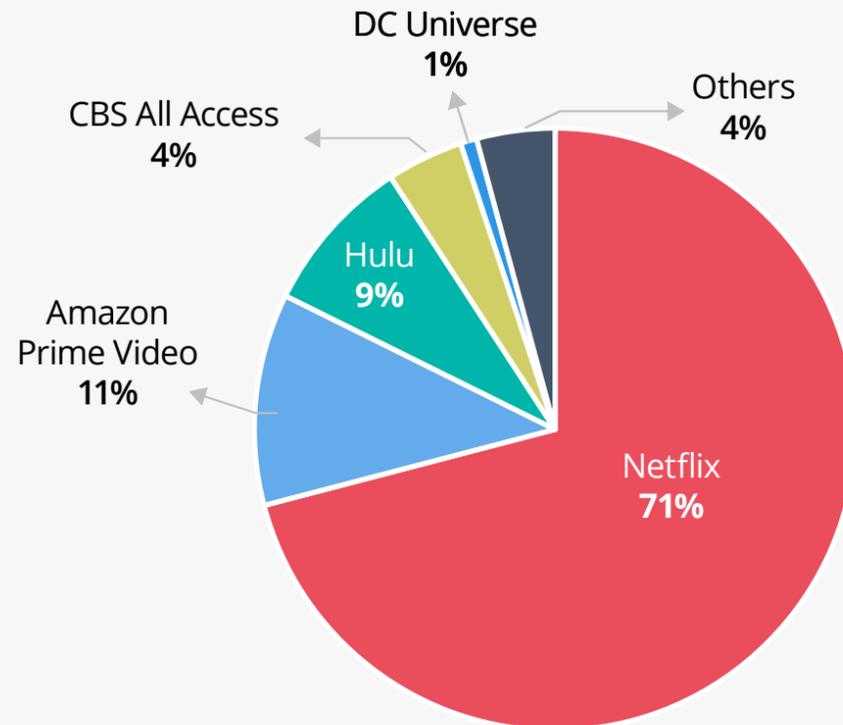


- ▶ The rate of new digital original series released accelerated exponentially in 2018.
- ▶ At least 319 new digital original series premiered during 2018 around the world, up from 147 last year.
- ▶ Netflix remains the world’s largest producer of original SVOD series, premiering 139 new titles during the year. This is the nearly as many as all platforms combined released in 2017.
- ▶ Facebook Watch also greatly increased how many new series they released this year, debuting 41 new titles.
- ▶ We have tracked new digital originals from more services than ever before in 2018, as regional SVOD services compete with the global players by offering tailored content for local audiences.

Global platform demand share for digital original series in 2018

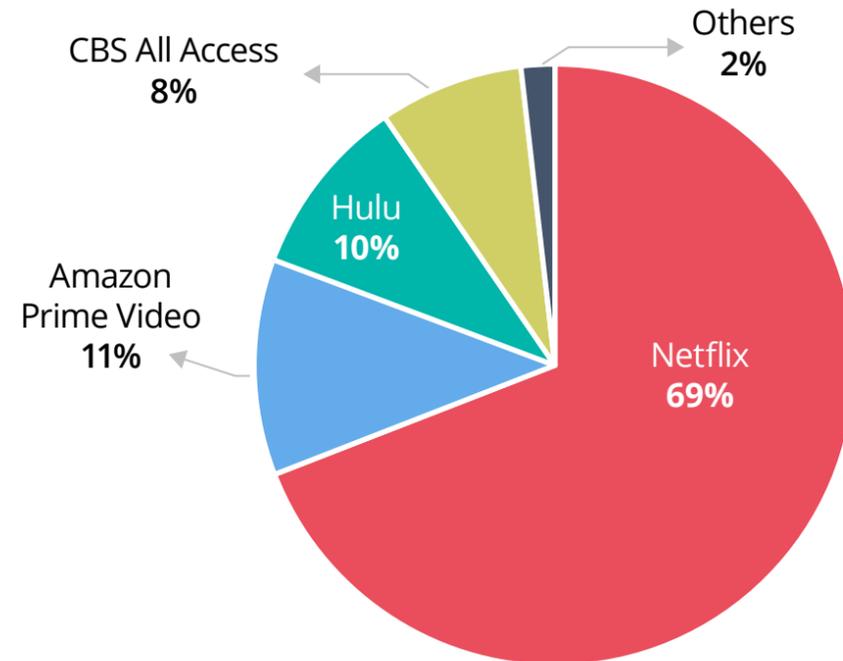
2018 | SVOD by Original Network

Worldwide platform demand share of digital originals 2018



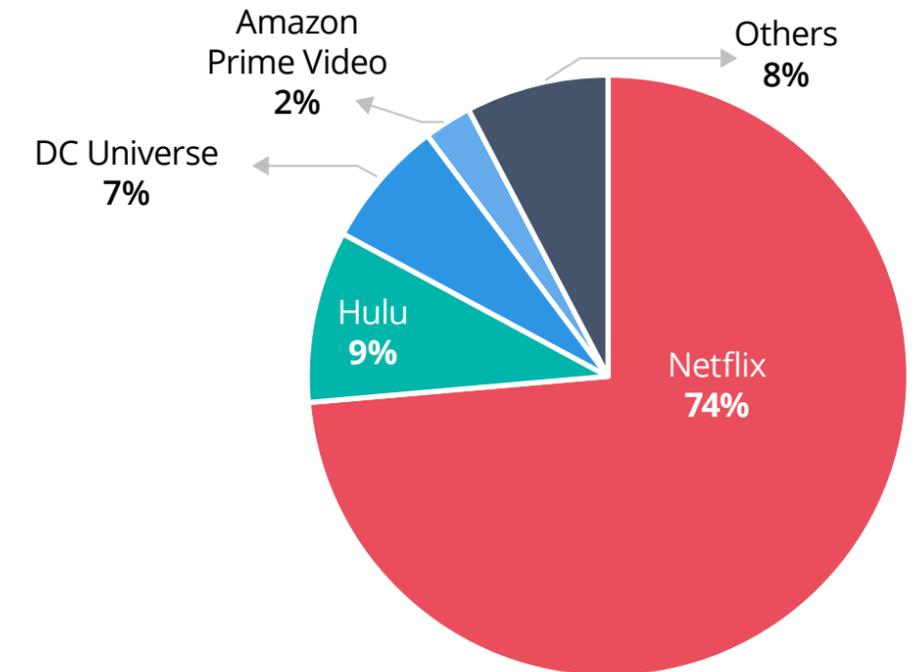
- ▶ Globally, by far the most demand was expressed for digital original series from Netflix.
- ▶ In 2018, 71% of all global demand for digital original titles was for Netflix series.
- ▶ 11% of all global demand was for original titles from Amazon Prime Video and 9% for Hulu Originals.

Worldwide platform share of drama digital originals 2018



- ▶ For digital originals in the Drama genre, Netflix had the highest demand share around the world, but at 69% this is a smaller share than for all titles.
- ▶ Competition in this genre is fierce, led by Amazon Prime Video and Hulu with 11% and 10% global share of drama demand, respectively.
- ▶ The share of global demand for drama for CBS All Access titles in this genre is 8%, twice as large as their share across all digital originals.

Worldwide platform share of action and adventure digital originals 2018



- ▶ In the Action and Adventure genre, including the huge superhero subgenre, Netflix titles have the largest global demand share with 74%.
- ▶ Hulu titles have the second largest demand share, accounting for 9% of the genre.
- ▶ The DC Universe service launched during 2018 and already DC Universe titles have a 7% share of demand in this genre.

Major SVOD platform events in 2018

January – December, 2018

Quarter 1

- ▶ At the 75th Golden Globes held in January, streaming services took home both top TV awards: Hulu's *The Handmaid's Tale* won Best Drama, while Amazon Prime Video's *The Marvelous Mrs. Maisel* won Best Comedy.
- ▶ Chinese SVOD service iQiyi held an IPO in March, raising USD 2.3 billion from investors.
- ▶ Amazon Prime Video merged two separate anime-focused services into the main Prime Video service in January.

Quarter 2

- ▶ CBS All Access launched in Canada in April, the first international market for the US-based service.
- ▶ Hulu announced in May that the service had reached over 20 million US subscribers.
- ▶ YouTube Red rebranded as YouTube Premium in Q2. The rebranding was accompanied by an expansion into 12 more markets.

Quarter 3

- ▶ At the 70th Emmy Awards Amazon Prime Video's *The Marvelous Mrs. Maisel* swept the night, winning 5 awards including Outstanding Comedy. Netflix dominated the Emmy nominations, replacing HBO as the platform with the most nominations.
- ▶ In July, Disney won their 71.3 billion USD bid to acquire 21st Century Fox. The deal is expected to complete by mid 2019, at which point Disney will own 60% of Hulu.
- ▶ Facebook Watch became available to customers in all markets worldwide in August.
- ▶ Comics-focused streaming service DC Universe launched to all US customers in September; DC Universe original *Titans* quickly became one of the most in-demand titles in the US.

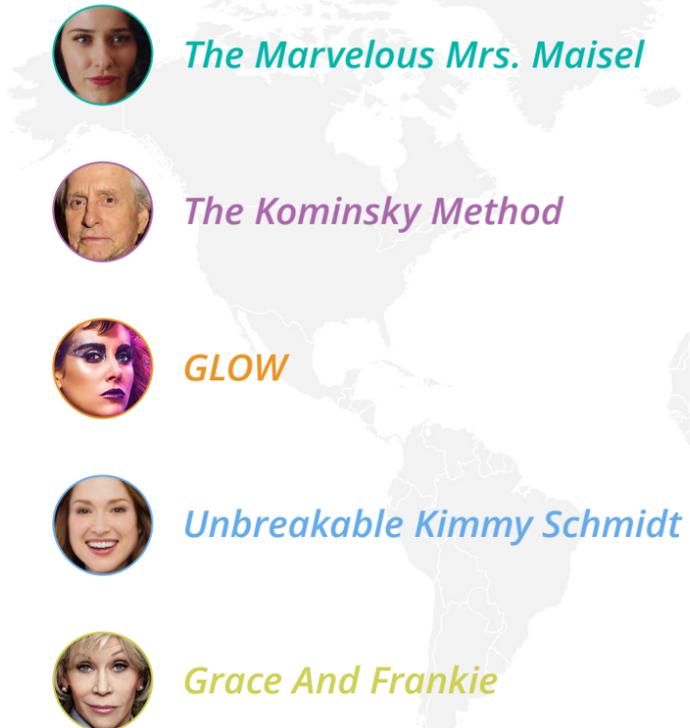
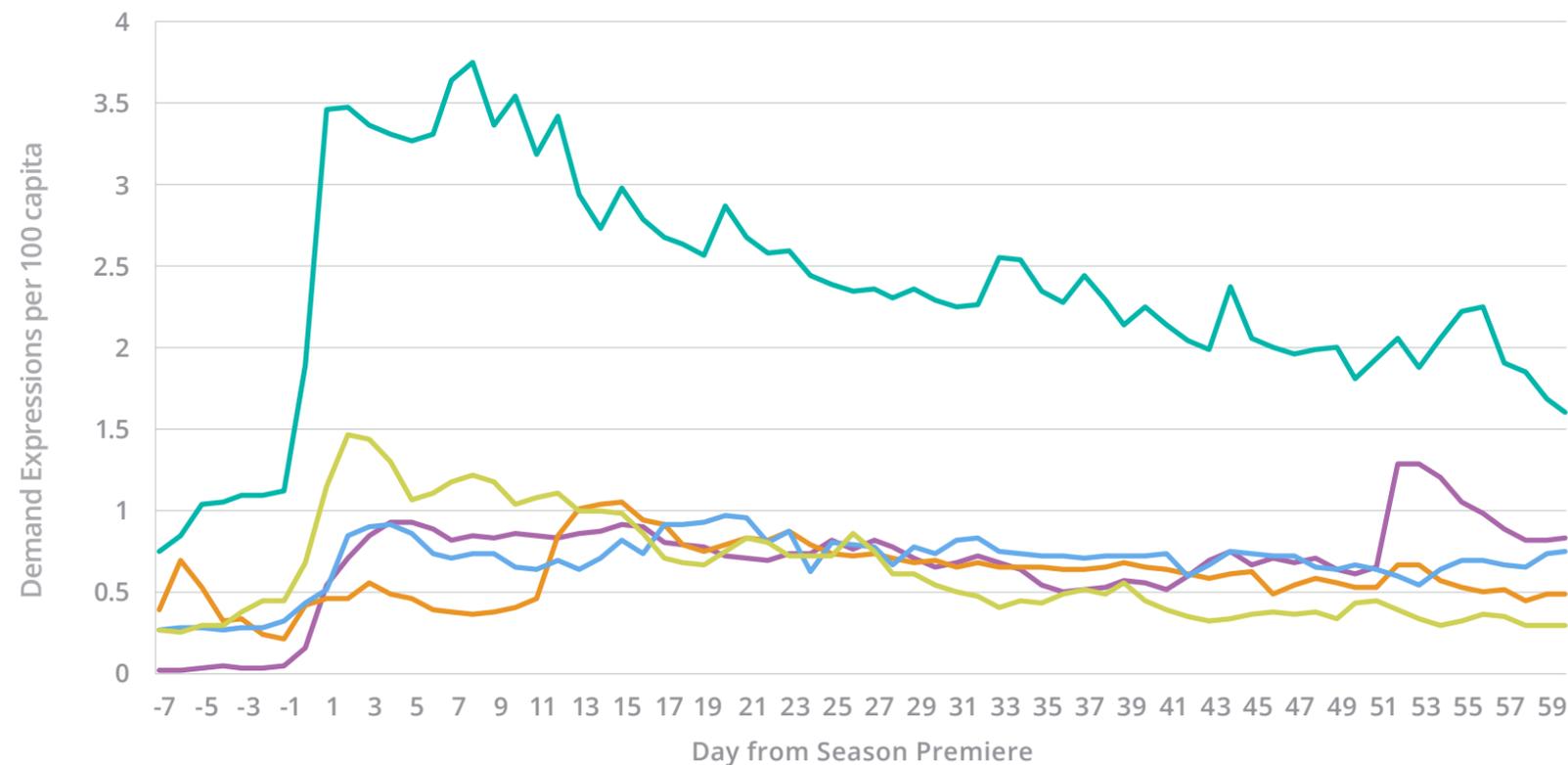
Quarter 4

- ▶ After continued expansion throughout 2018, YouTube Premium is now available in 26 markets.
- ▶ In December, Malaysian-based iflix sold their African SVOD interests to focus on Asian markets.
- ▶ Netflix announced in October they had over 137 million international subscribers, at the same time announcing the company was raising USD 2 billion more in debt funding to produce new content.
- ▶ Disney's CEO announced in November that their upcoming streaming service will be called Disney+ and will be available in late 2019.
- ▶ AT&T announced their own plans for a HBO-led streaming service to launch in Q4 2019.
- ▶ After industry rumors circulated in December, Apple's long-awaited streaming service was confirmed to launch in the first half of 2019.

Insights Snapshot: The global demand for critically acclaimed digital original comedies

January – December, 2018

Global demand for the most recent season of acclaimed digital original comedies



- ▶ This chart shows the global demand over time for scripted comedies that were nominated for, or won, an award at the 70th Emmys and/or the 76th Golden Globes.
- ▶ The chart is time-shifted to compare the release of each season, not the effect of the awards on each show.
- ▶ Our analysis reveals that Amazon Prime Video's *The Marvelous Mrs. Maisel* has the highest global demand out of all nominated comedies. Not only is it most in-demand globally out of these nominated shows, it has also won the most awards out of these five titles, winning 6 awards across the two ceremonies.

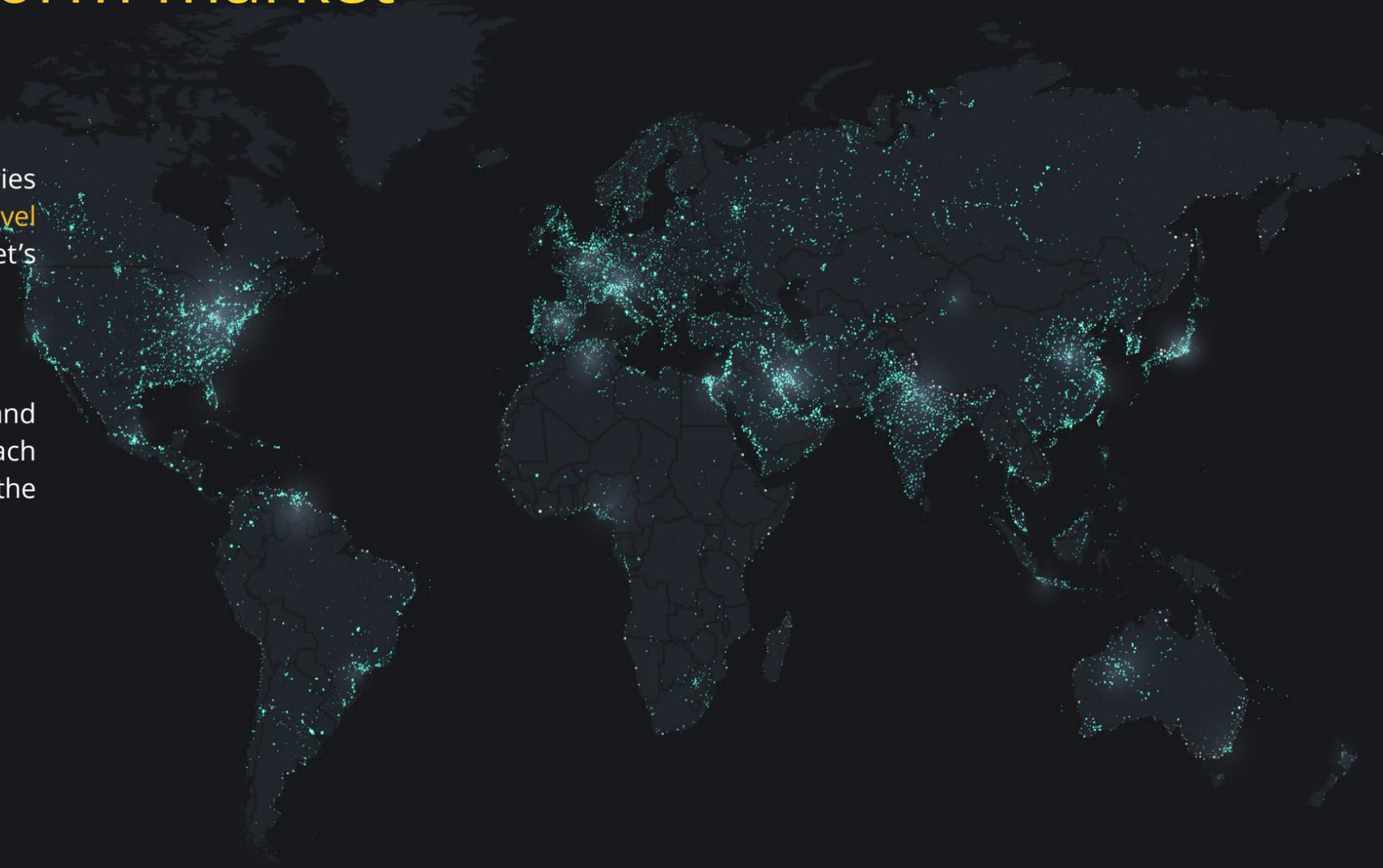
- ▶ Four of the titles in this analysis are from Netflix, including new series *The Kominsky Method*. Although as a freshman this title started with comparatively low initial demand, even before it won any awards it premiered well, gaining more demand on release than the premieres of established comedies *Unbreakable Kimmy Schmidt* and *GLOW*.
- ▶ *The Kominsky Method* was premiered within 60 days of the show's Globes wins and so the effect on demand for the show from the awards can be readily observed in the chart.

Market-specific TV content trends

Global content travelability, digital originals and genre trends, and SVOD platform market demand share

This section presents our latest global TV demand data trends: For each of the 10 territories examined, we present our findings with respect to **how well each market's productions travel around the world** relative to the home market, and how much demand exists for a market's subgenres relative to the global average.

We also reveal **each market's SVOD demand share by original platform** for digital originals and break this down for drama and action/adventure digital originals. Finally, we include for each market a demand distribution of some of **the most in-demand digital originals** and also reveal the top 20 overall most in-demand digital originals across all platforms.

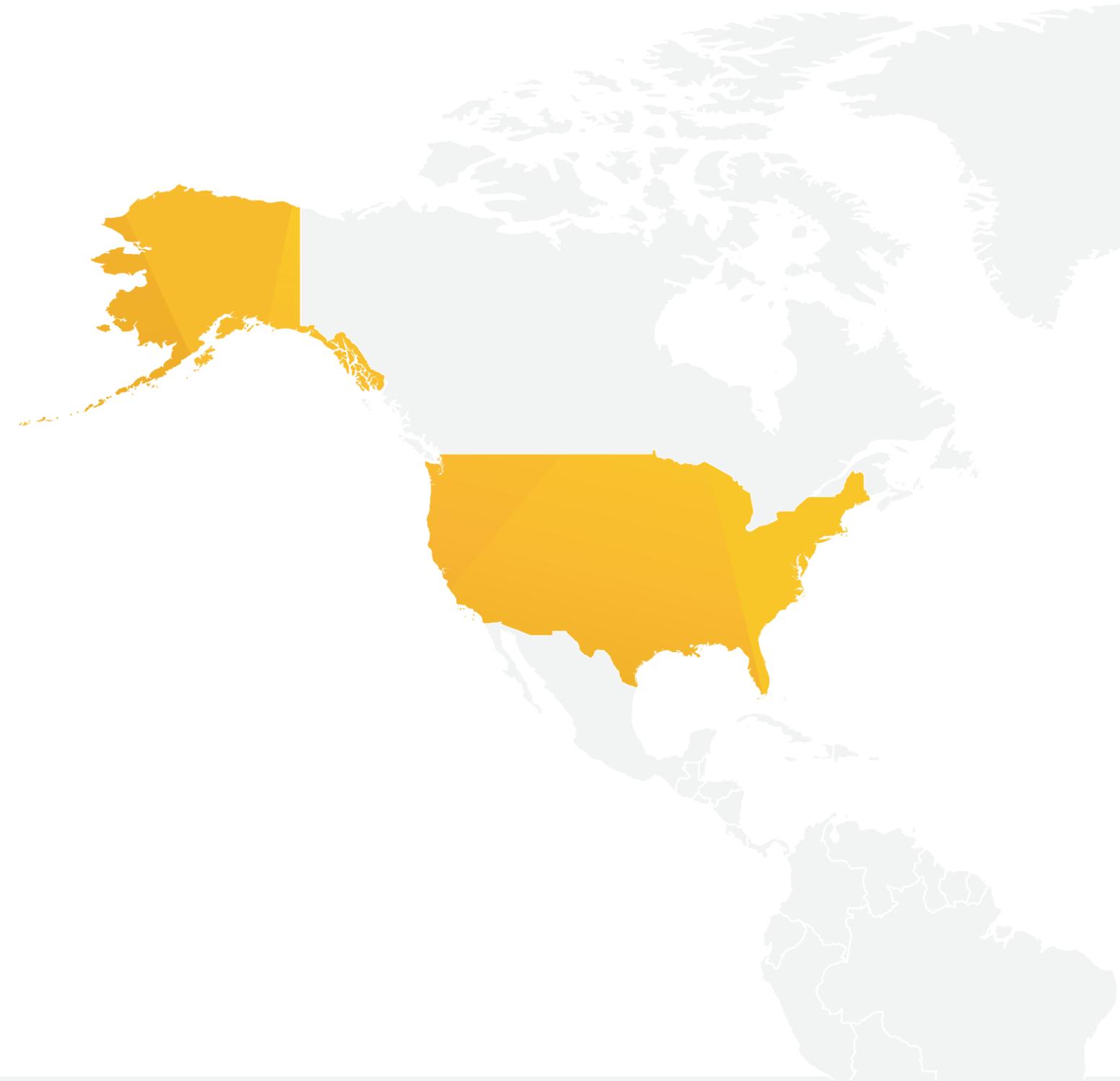


Travelability, subgenre, platform demand share and digital original trends

United States

Learn where in the world content produced in this market is most wanted and which subgenres resonate the most with Americans. Discover the demand share of the leading SVOD platforms over the last 2 years and explore demand for the top 20 streaming originals.

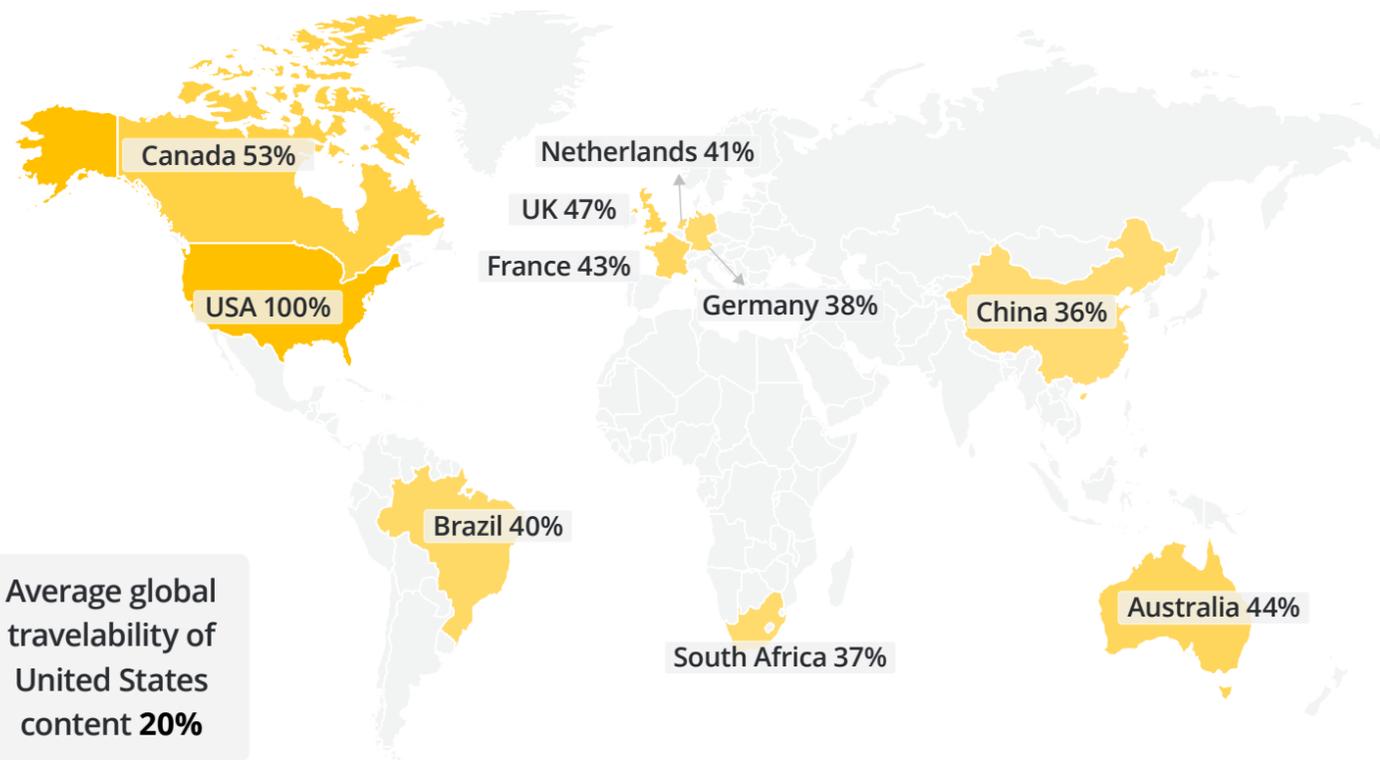
NOTE: The insights presented in this section are based on the entire available Parrot Analytics global TV demand dataset, which is comprised of 3.5 trillion data points across 100+ languages in 100+ countries.



Travelability of United States local productions and local subgenre preferences

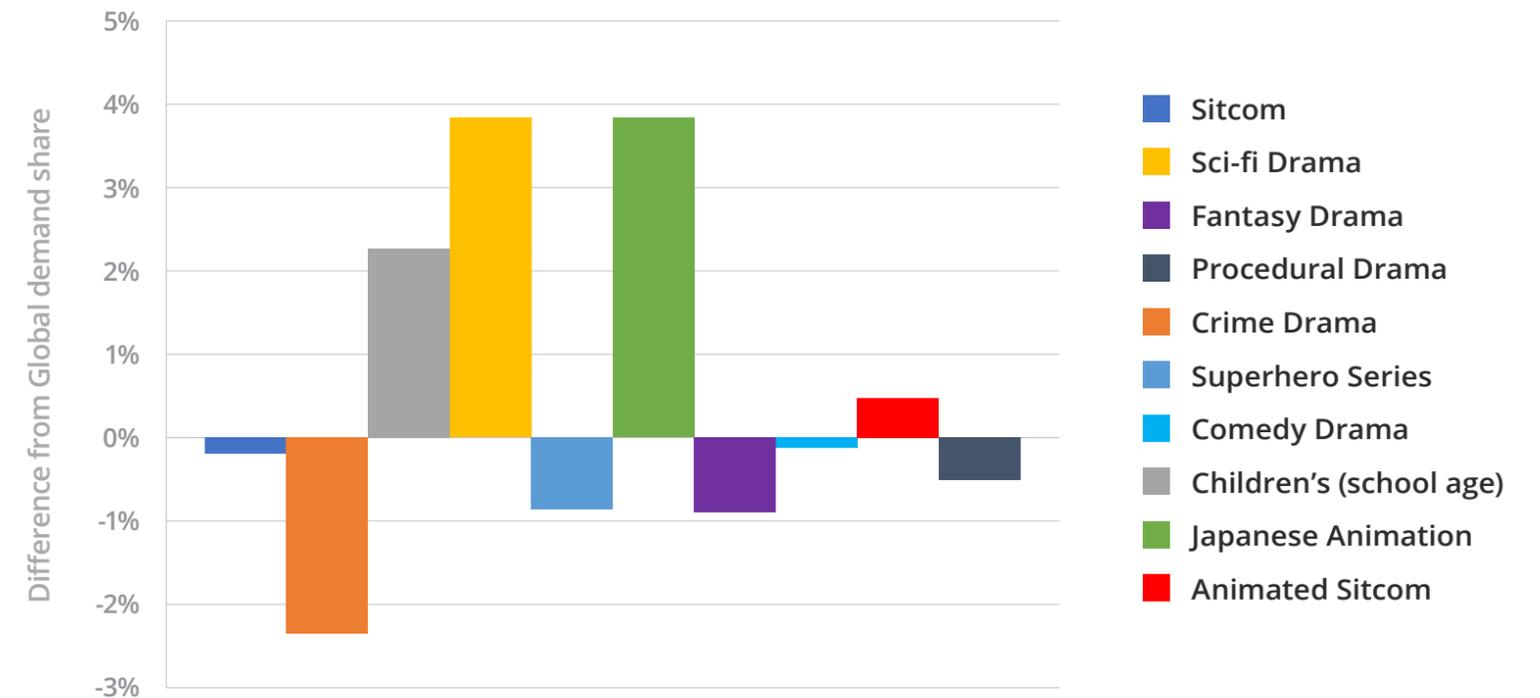
January – December, 2018

The global travelability of content produced in the United States



- ▶ Content travelability reveals where in the world local productions find an audience overseas, relative to the content’s country of origin.
- ▶ Content from the USA travels best to other Anglosphere markets like Canada and the UK. For example, in Canada the average American title has 53% of the demand the same average title would have in the USA.
- ▶ US content also travels better than content from most other markets, with a high global travelability of 19.6%, the second highest percentage out of all 10 markets in this report.

Most in-demand US subgenres compared to global trends

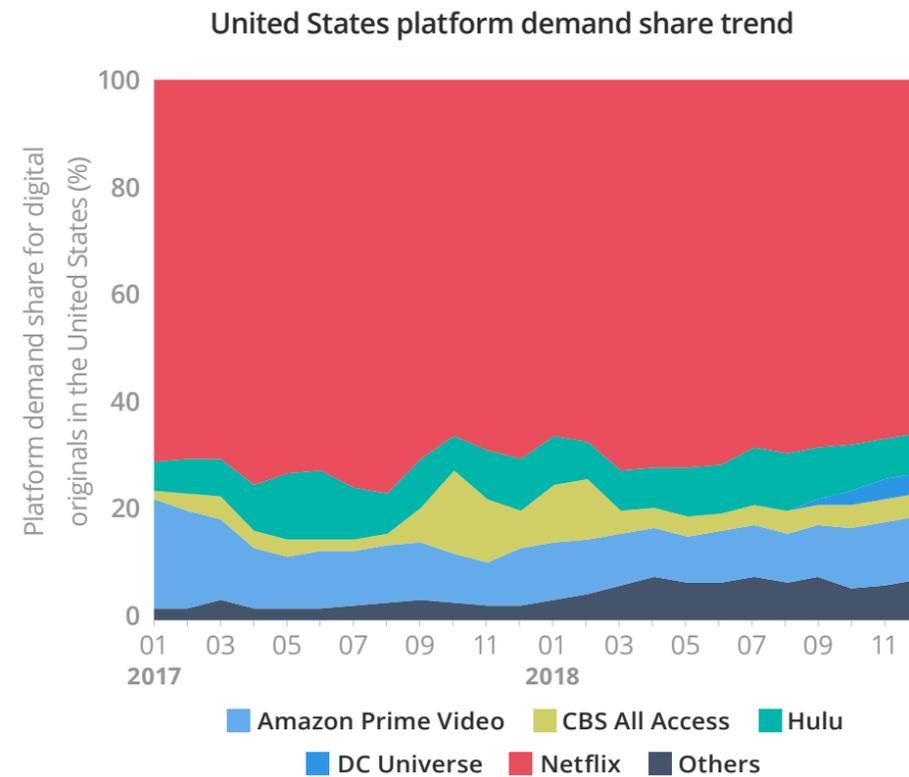
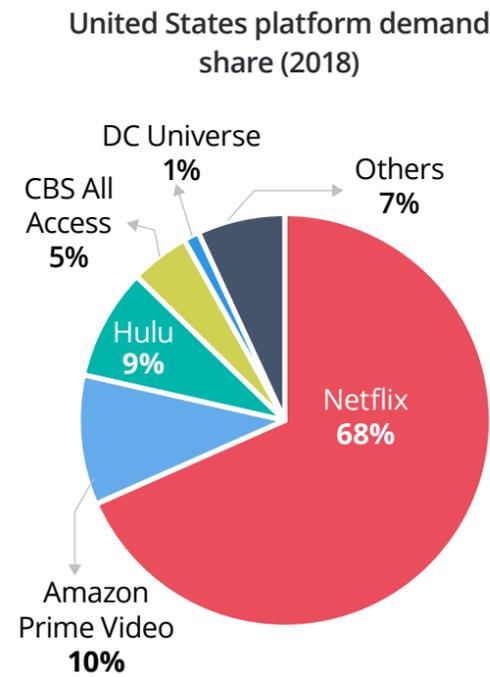


- ▶ These are the ten subgenres with the highest demand share from US audiences for all TV titles, including SVOD, cable and broadcast titles. The largest demand share is for sitcoms, which accounts for 8.6% of all expressed demand in this market, 0.2% less than the global average.
- ▶ Compared to the global averages, US viewers prefer sci-fi dramas and anime; the demand share in this market for both of these subgenres is 3.9% higher than the global average.
- ▶ Although still the second largest subgenre, crime dramas actually have 2.4% less demand share in the US than they do globally.

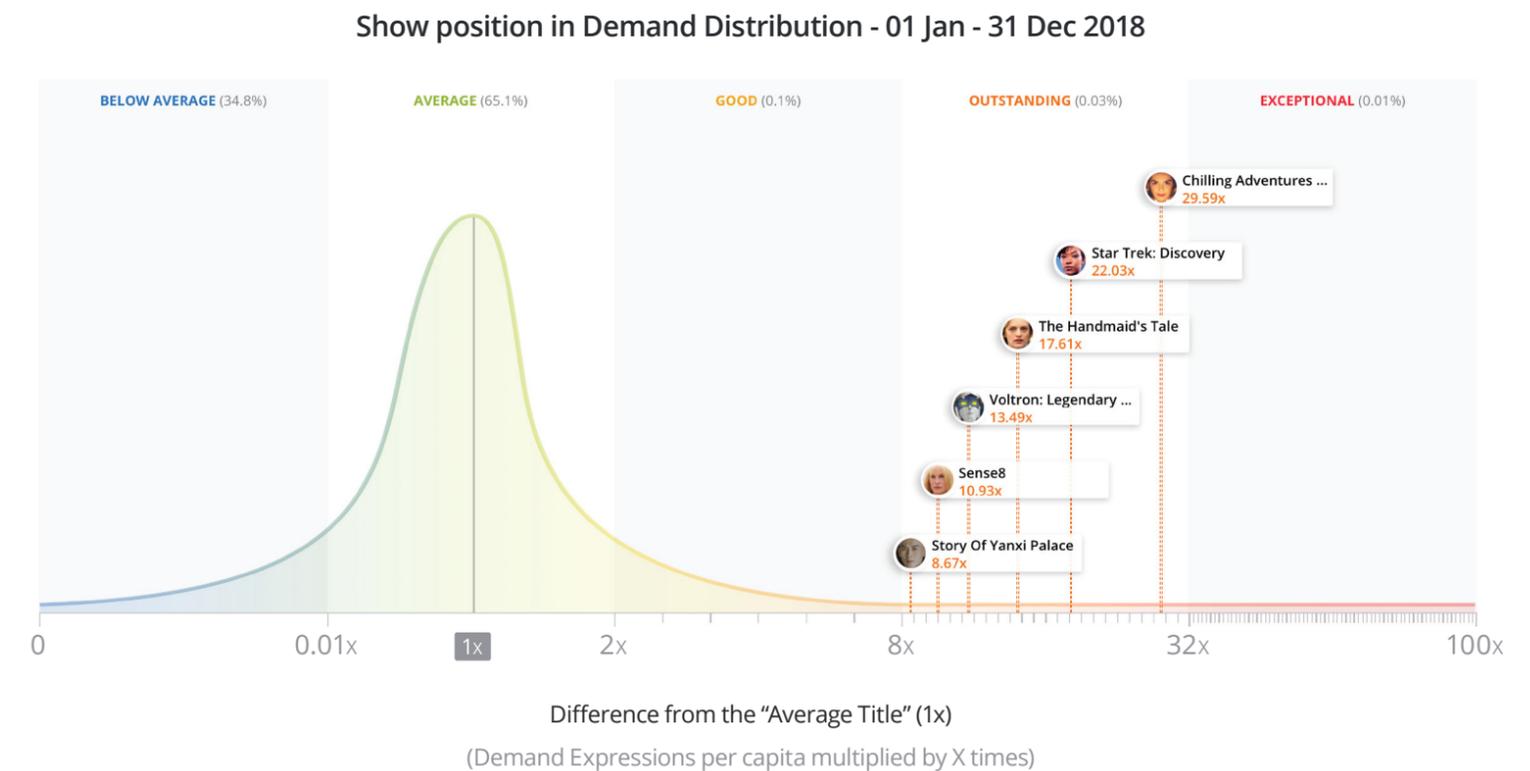
United States platform demand share and digital originals demand distribution

January, 2017 – December, 2018

United States market demand share by original platform for all digital originals



Demand distribution of a selection of top digital originals in the United States



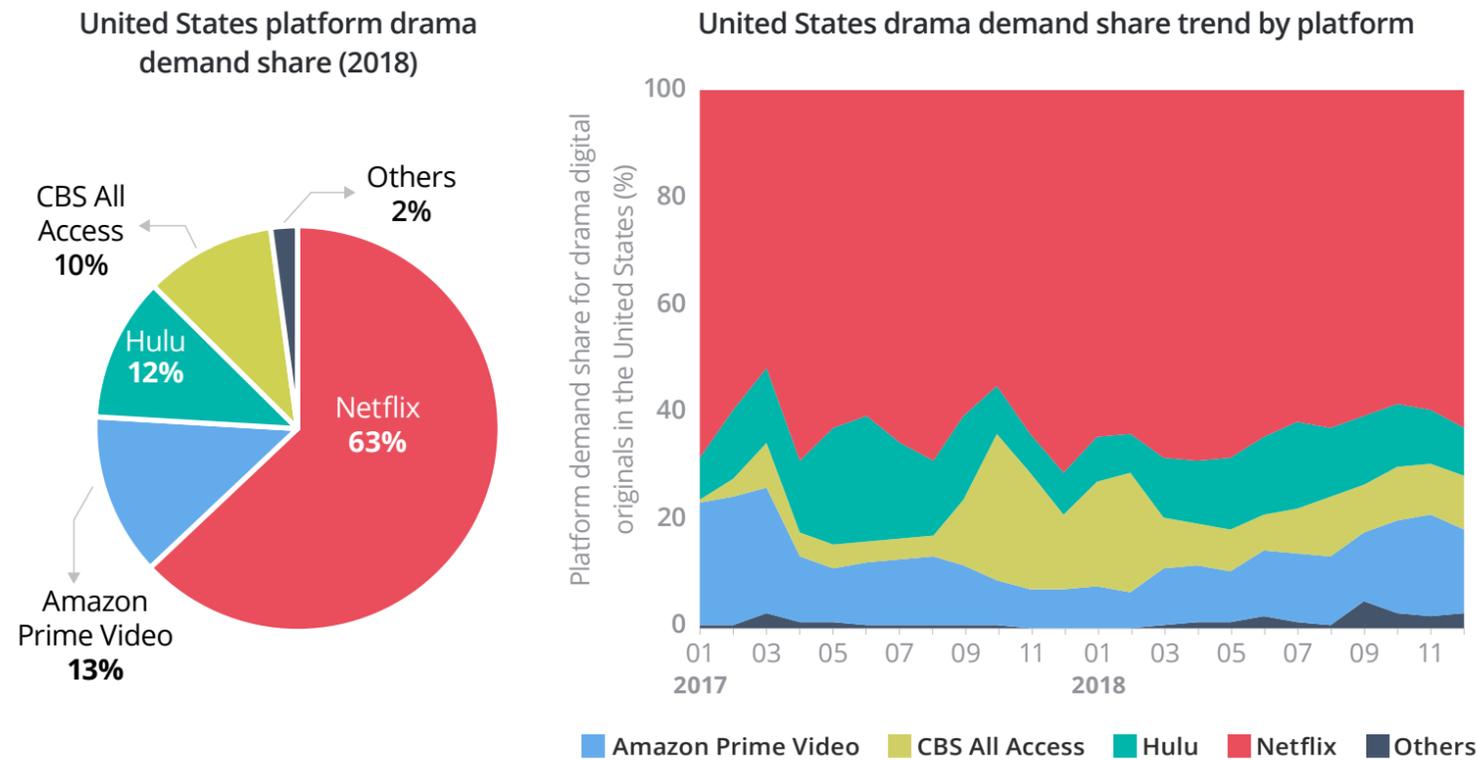
- ▶ Across all genres of digital original titles in the US in 2018, Netflix titles account for 68% of expressed demand.
- ▶ The second highest demand share is for Prime Originals (10%) and third is Hulu (9%).
- ▶ The impact of the ramping up of DC Universe content can be clearly seen in late 2018 in the 24 month demand share trend chart.

- ▶ Despite being released late in 2018, Netflix's *Chilling Adventures Of Sabrina* is the most in-demand digital original in the US with close to 30 times the demand of an average title. We refer to this simply as "Outstanding" demand.
- ▶ Children's title *Voltron* had a strong appeal to US audiences in 2018 and the feature-length conclusion to *Sense8* helped this series also rank highly over the year.
- ▶ Asian-market phenomenon *Story Of Yanxi Palace* also made waves in the US market, ranking 21st in demand for 2018.

United States platform demand share for drama and action/adventure digital originals

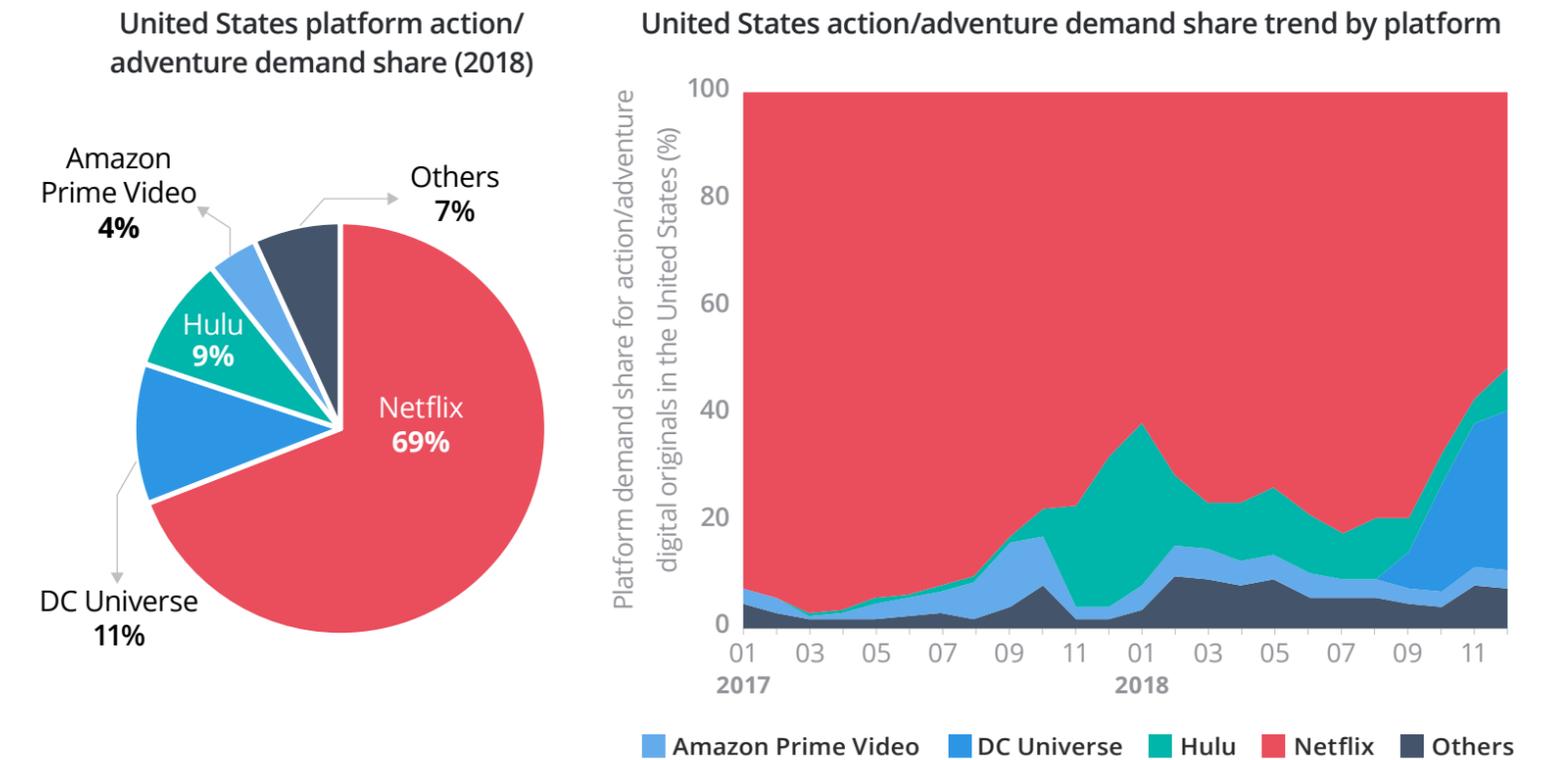
January, 2017 – December, 2018

United States market demand share by original platform for drama digital originals



- ▶ With 63% of the demand share for drama digital original titles, in 2018 Netflix titles account for the majority of the demand expressed for this genre in the USA.
- ▶ In 2018, Amazon Prime Video has 13% of the US drama demand, followed by Hulu with 12%.
- ▶ The 24 month demand share trend chart reveals that Netflix has been able to maintain approximately 60% share of drama demand.

United States market demand share by original platform for action/adventure digital originals



- ▶ Netflix also dominates the action/adventure genre, with over two thirds of US demand for digital originals in this genre expressed for Netflix titles.
- ▶ DC Universe has recently elevated its position in this genre, capturing 11% of US action/adventure demand in 2018.
- ▶ The erosion of Netflix's dominance in this genre towards the end of 2018 is evident in the 24 month demand share trend chart.

Top digital original series in the United States

January – December, 2018

The top 20 most in-demand digital original series:

Series Name	In-Market Platform*	Original Platform	Genre	Average daily Demand Expressions (DEx) in 2018
1 <i>Chilling Adventures Of Sabrina</i>	Netflix	Netflix	Horror	31,906,065
2 <i>Titans</i>	DC Universe	DC Universe	Action/Adventure	30,052,995
3 <i>Stranger Things</i>	Netflix	Netflix	Sci-Fi	27,613,781
4 <i>Star Trek: Discovery</i>	CBS All Access	CBS All Access	Sci-Fi	23,665,187
5 <i>Orange Is The New Black</i>	Netflix	Netflix	Comedy Drama	21,269,989
6 <i>13 Reasons Why</i>	Netflix	Netflix	Drama	20,632,174
7 <i>The Haunting Of Hill House</i>	Netflix	Netflix	Horror	19,468,249
8 <i>The Handmaid's Tale</i>	Hulu	Hulu	Drama	19,058,892
9 <i>Marvel's Daredevil</i>	Netflix	Netflix	Action/Adventure	18,851,500
10 <i>Voltron: Legendary Defender</i>	Netflix	Netflix	Children	14,709,509
11 <i>Narcos</i>	Netflix	Netflix	Drama	14,525,116
12 <i>Black Mirror</i>	Netflix	Netflix	Sci-Fi	13,936,251
13 <i>Money Heist (La Casa De Papel)</i>	Netflix	Netflix	Drama	13,110,962
14 <i>Cobra Kai</i>	YouTube Premium	YouTube Premium	Comedy	12,780,951
15 <i>Sense8</i>	Netflix	Netflix	Drama	11,746,084
16 <i>Marvel's Jessica Jones</i>	Netflix	Netflix	Action/Adventure	11,462,859
17 <i>Ozark</i>	Netflix	Netflix	Drama	11,449,809
18 <i>House Of Cards</i>	Netflix	Netflix	Drama	10,552,612
19 <i>BoJack Horseman</i>	Netflix	Netflix	Comedy	10,499,897
20 <i>Queer Eye</i>	Netflix	Netflix	Reality	10,140,532

A selection of 5 additional digital original series of interest:

21 <i>Story Of Yanxi Palace (延禧攻略)</i>	iQiyi	iQiyi	Drama	10,008,749
24 <i>The Man In The High Castle</i>	Amazon Prime Video	Amazon Prime Video	Sci-Fi	9,739,937
28 <i>The First</i>	Hulu	Hulu	Science Fiction	9,258,536
30 <i>The Marvelous Mrs. Maisel</i>	Amazon Prime Video	Amazon Prime Video	Comedy	9,012,347
34 <i>Marvel's Runaways</i>	Hulu	Hulu	Action/Adventure	8,779,374

* Distributor for most recent season in case of multiple platforms

Travelability, subgenre, platform demand share and digital original trends

Australia

Learn where in the world content produced in this market is most wanted and which subgenres resonate the most with Australians. Discover the demand share of the leading SVOD platforms over the last 2 years and explore demand for the top 20 streaming originals.

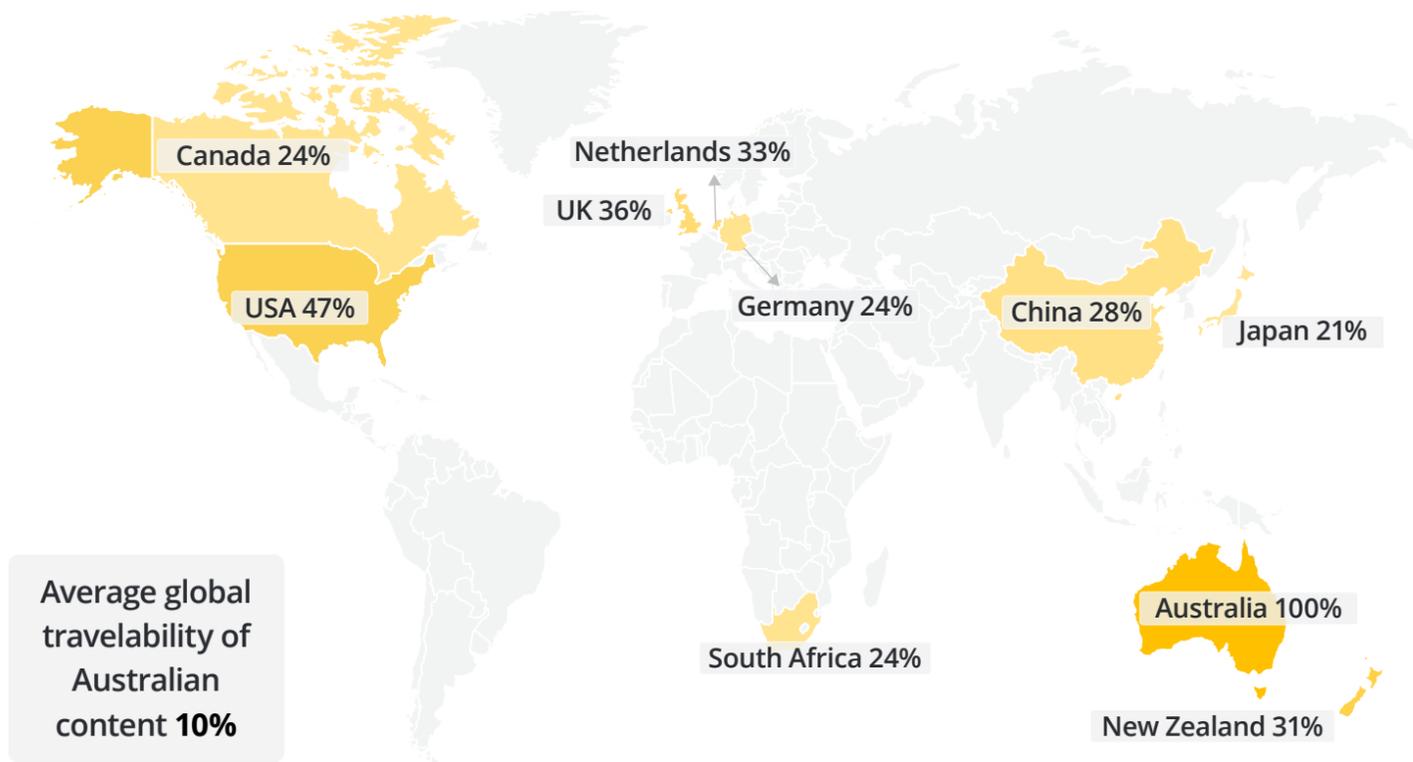


NOTE: The insights presented in this section are based on the entire available Parrot Analytics global TV demand dataset, which is comprised of 3.5 trillion data points across 100+ languages in 100+ countries.

Travelability of Australian local productions and local subgenre preferences

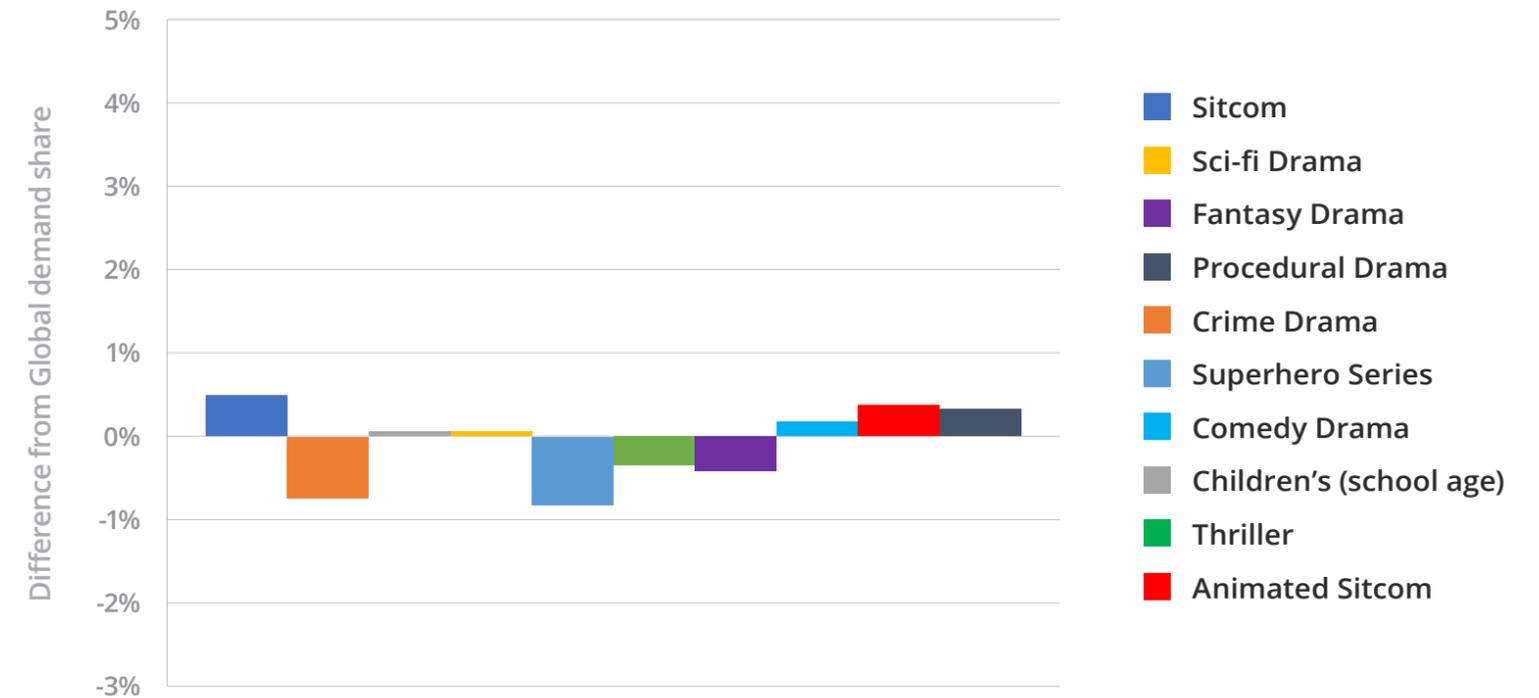
January – December, 2018

The global travelability of content produced in Australia



- ▶ Content from Australia travels best to the United States and the United Kingdom, as well as its neighbour New Zealand.
- ▶ Surprisingly, content from Australia travels better to China than English-speaking Canada.
- ▶ Australian content has the lowest global travelability of the English-speaking markets in this report with 9.8%. However, this is still almost twice as good as the average of the other markets in this report.

Most in-demand Australian subgenres compared to global trends

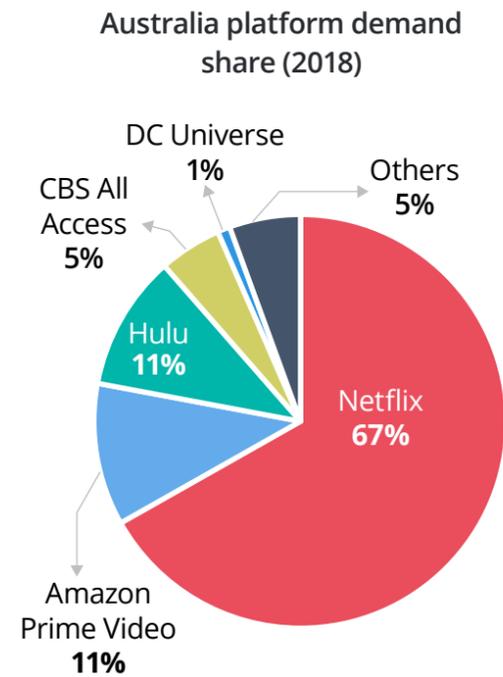


- ▶ The largest demand share is for sitcoms, which accounts for 9.3% of all expressed demand in this market, 0.5% more than the global average.
- ▶ Australian audiences generally mirror global preferences: None of the subgenres with the highest demand share in this market are more than 0.8% different from the global average.
- ▶ Although superhero titles represent the fourth most in-demand subgenre, the subgenre's demand share in Australia is 0.8% less than the worldwide average.

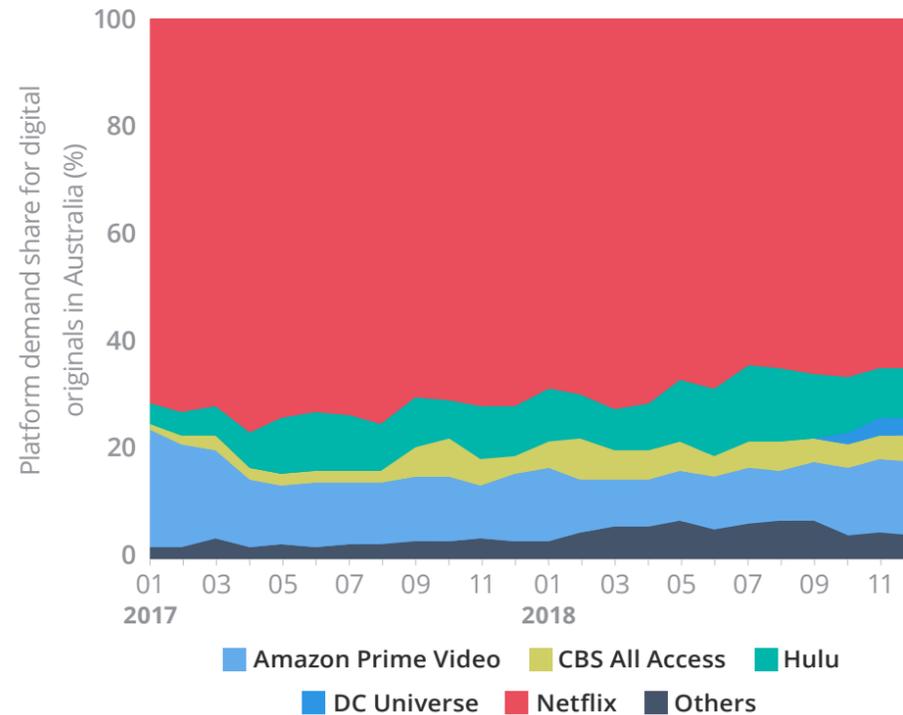
Australia platform demand share and digital originals demand distribution

January, 2017 – December, 2018

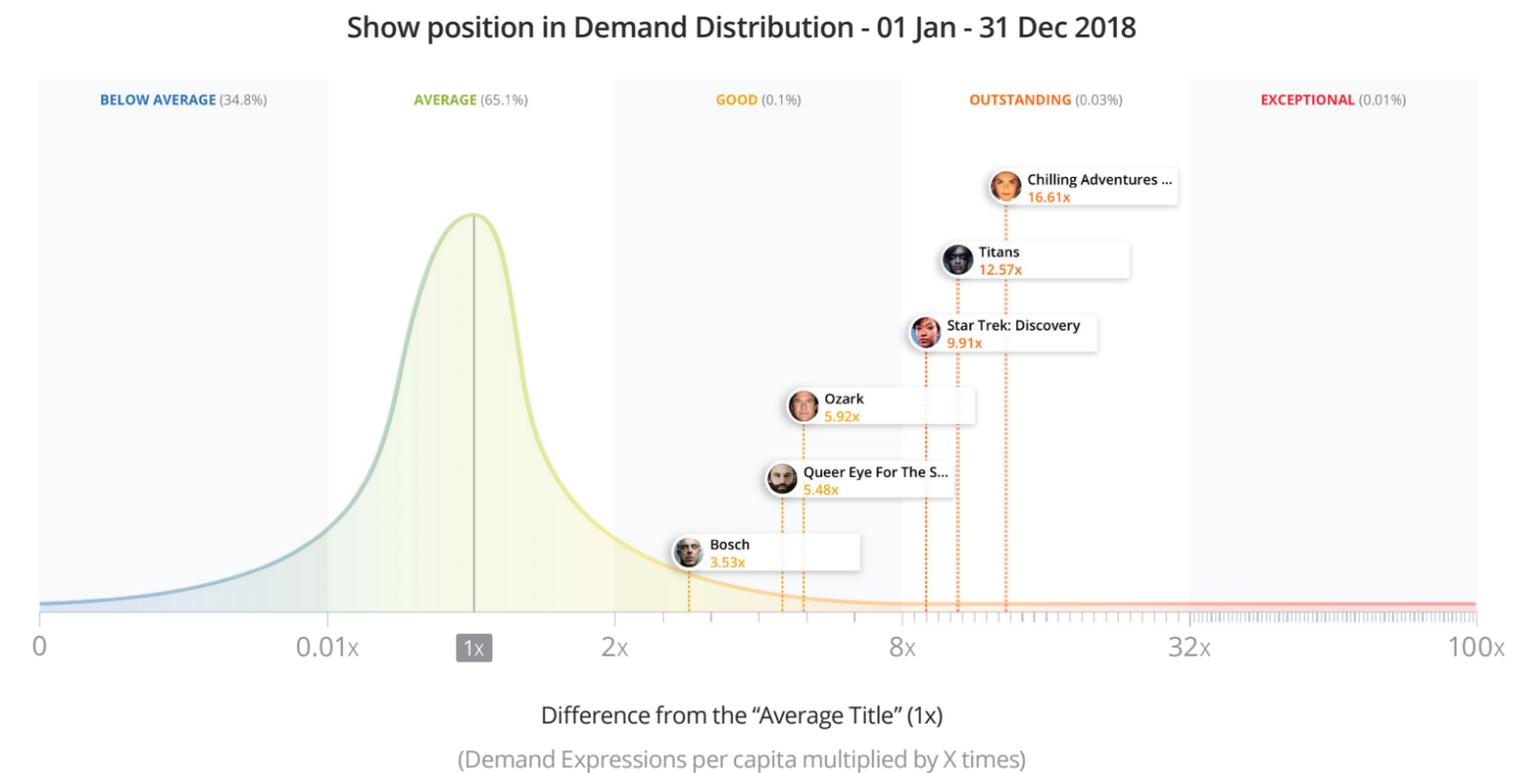
Australia market demand share by original platform for all digital originals



Australia platform demand share trend



Demand distribution of a selection of top digital originals in Australia



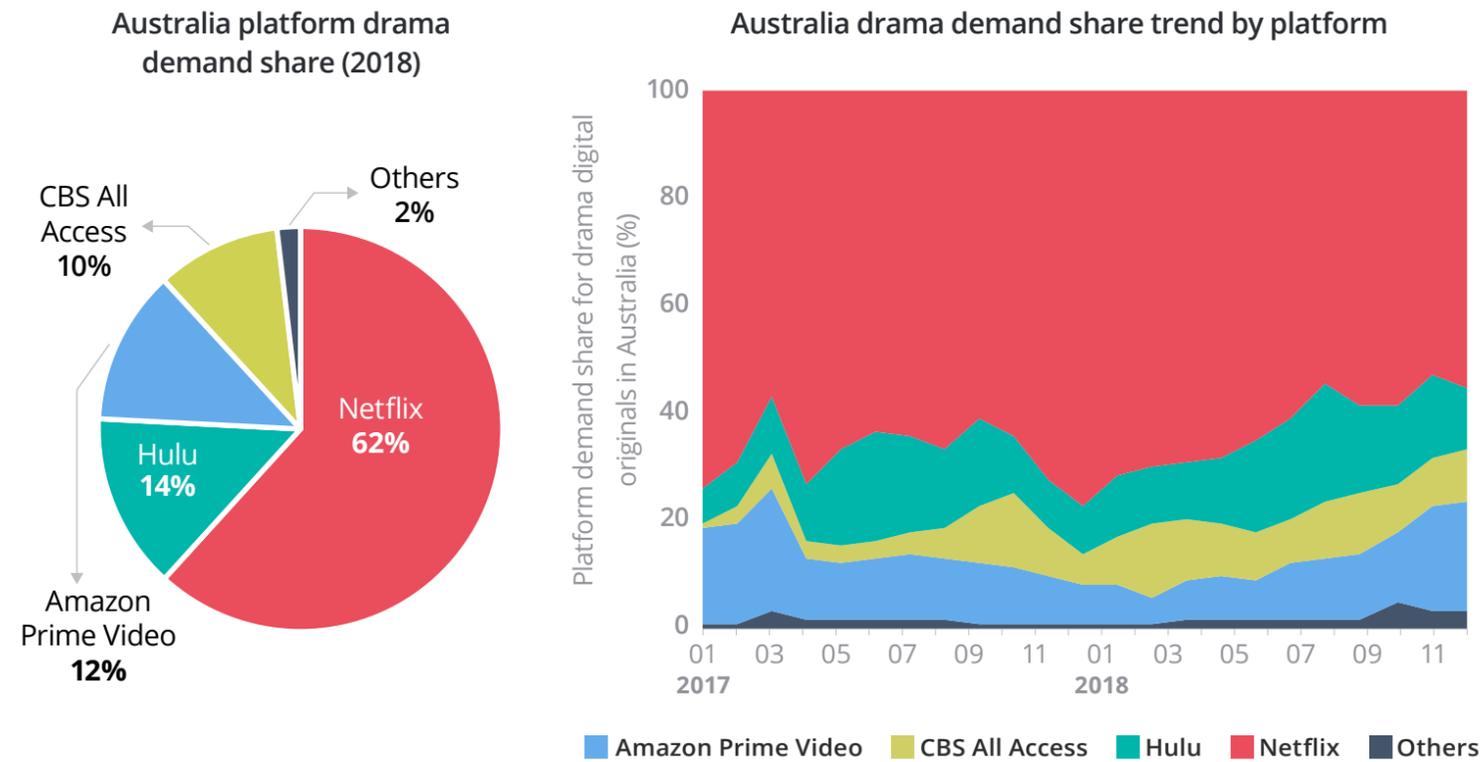
- ▶ In the Australian digital original space, Netflix titles have the largest share of demand; 67% of all demand expressed in 2018 was for a Netflix title.
- ▶ Prime Originals have an 11% demand share in this market, as do Hulu titles.
- ▶ The 24-month Australian demand share trend is fairly steady, with a slight trend towards a smaller share of demand for Netflix Originals.

- ▶ Netflix's *Chilling Adventures Of Sabrina* is the most in-demand digital original in Australia. *Sabrina* has close to 17 times the demand of the average title in Australia.
- ▶ *Titans* and *Star Trek: Discovery* are also "Outstanding" shows in Australia for 2018.
- ▶ Although many markets have strong demand for Amazon Prime Video's *Bosch*, Australia is one of the markets where demand is expressed the strongest.

Australia platform demand share for drama and action/adventure digital originals

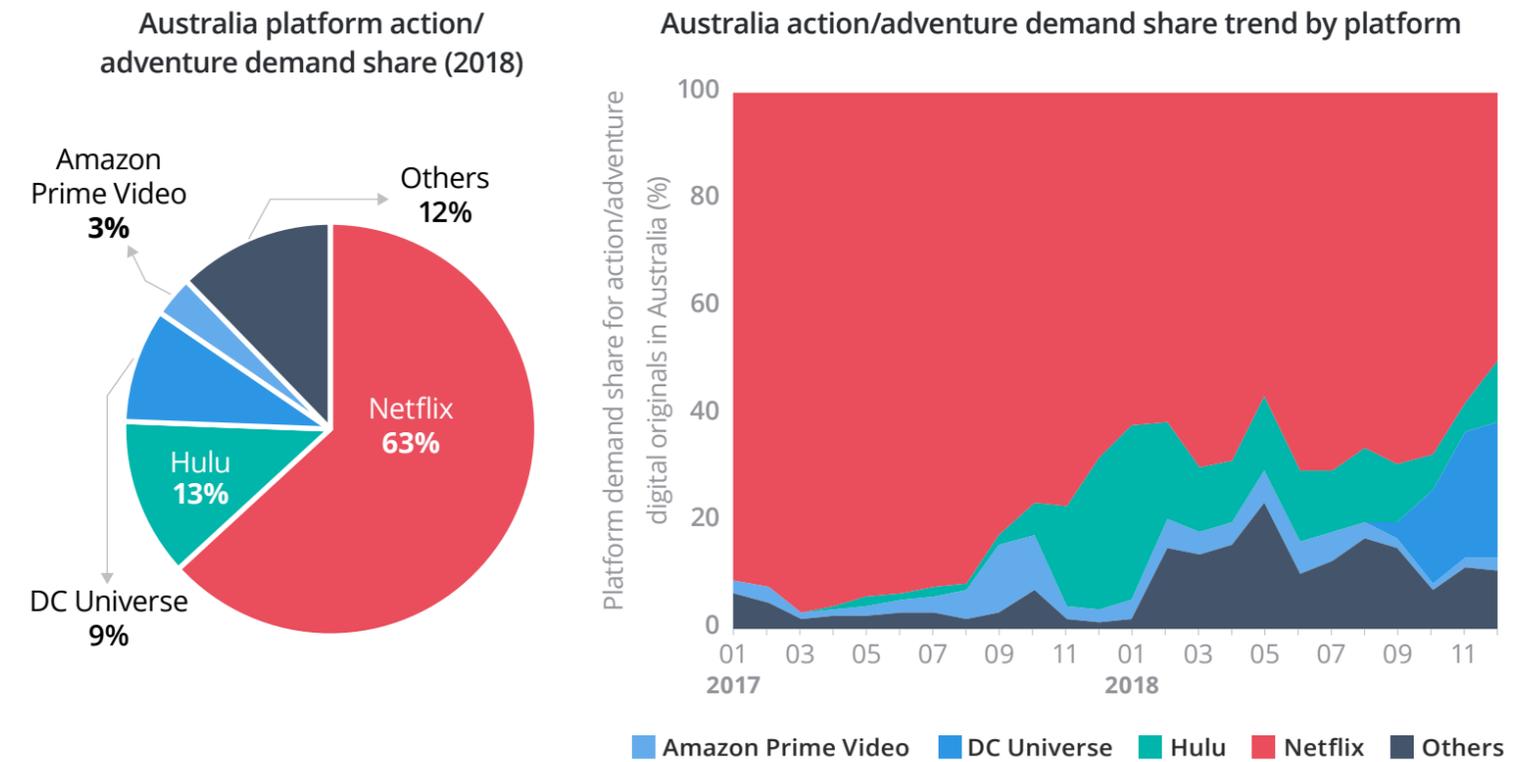
January, 2017 – December, 2018

Australia market demand share by original platform for drama digital originals



- ▶ The majority (62%) of demand for drama titles in Australia is expressed for titles from Netflix.
- ▶ Hulu has the second largest demand share in Australia with 14% of drama demand expressed for Hulu original titles; Prime Originals account for 12% of Australian drama demand in 2018.
- ▶ The 24 month demand share trend chart reveals that Netflix's share of drama demand has decreased from approximately 75% two years ago to around 55% at the end of 2018.

Australia market demand share by original platform for action/adventure digital originals



- ▶ Netflix titles account for 63% of Australian demand for action/adventure digital originals.
- ▶ Hulu titles attract the second largest share of demand (13%) in this market, followed closely by DC Universe with 9%.
- ▶ Netflix's share of demand for action/adventure digital originals in this market has decreased rapidly over a two year period; in the second half of 2018 this decrease was accelerated by DC Universe.

Top digital original series in Australia

January – December, 2018

The top 20 most in-demand digital original series:

Series Name	In-Market Platform*	Original Platform	Genre	Average daily Demand Expressions (DEx) in 2018
1 <i>Chilling Adventures Of Sabrina</i>	Netflix	Netflix	Horror	1,315,293
2 <i>Stranger Things</i>	Netflix	Netflix	Sci-Fi	1,159,317
3 <i>Titans</i>	Netflix	DC Universe	Action/Adventure	1,038,498
4 <i>The Handmaid's Tale</i>	SBS	Hulu	Drama	1,035,397
5 <i>Orange Is The New Black</i>	Netflix	Netflix	Comedy Drama	947,934
6 <i>Star Trek: Discovery</i>	Netflix	CBS All Access	Sci-Fi	785,302
7 <i>13 Reasons Why</i>	Netflix	Netflix	Drama	780,127
8 <i>The Haunting Of Hill House</i>	Netflix	Netflix	Horror	717,351
9 <i>The Grand Tour</i>	Amazon Prime Video	Amazon Prime Video	Reality	695,404
10 <i>Marvel's Daredevil</i>	Netflix	Netflix	Action/Adventure	631,103
11 <i>Black Mirror</i>	Netflix	Netflix	Sci-Fi	584,440
12 <i>Altered Carbon</i>	Netflix	Netflix	Sci-Fi	489,390
13 <i>Ozark</i>	Netflix	Netflix	Drama	488,933
14 <i>Voltron: Legendary Defender</i>	Netflix	Netflix	Children	479,385
15 <i>Cobra Kai</i>	YouTube Premium	YouTube Premium	Comedy	453,909
16 <i>The Crown</i>	Netflix	Netflix	Drama	452,594
17 <i>Narcos</i>	Netflix	Netflix	Drama	439,942
18 <i>Queer Eye</i>	Netflix	Netflix	Reality	436,303
19 <i>House Of Cards</i>	Netflix	Netflix	Drama	430,834
20 <i>Arrested Development</i>	Netflix	Netflix	Comedy	426,161

A selection of 5 additional digital original series of interest:

22 <i>Marvel's Runaways</i>	Foxtel	Hulu	Action and Adventure	408,729
23 <i>The Good Fight</i>	SBS	CBS All Access	Drama	405,425
31 <i>Carpool Karaoke</i>	Apple	Apple	Reality	340,854
35 <i>Bosch</i>	Amazon Prime Video	Amazon Prime Video	Drama	283,009
65 <i>Tidelands</i>	Netflix	Netflix	Drama	173,000

* Distributor for most recent season in case of multiple platforms

Travelability, subgenre, platform demand share and digital original trends

Brazil

Learn where in the world content produced in this market is most wanted and which subgenres resonate the most with Brazilians. Discover the demand share of the leading SVOD platforms over the last 2 years and explore demand for the top 20 streaming originals.

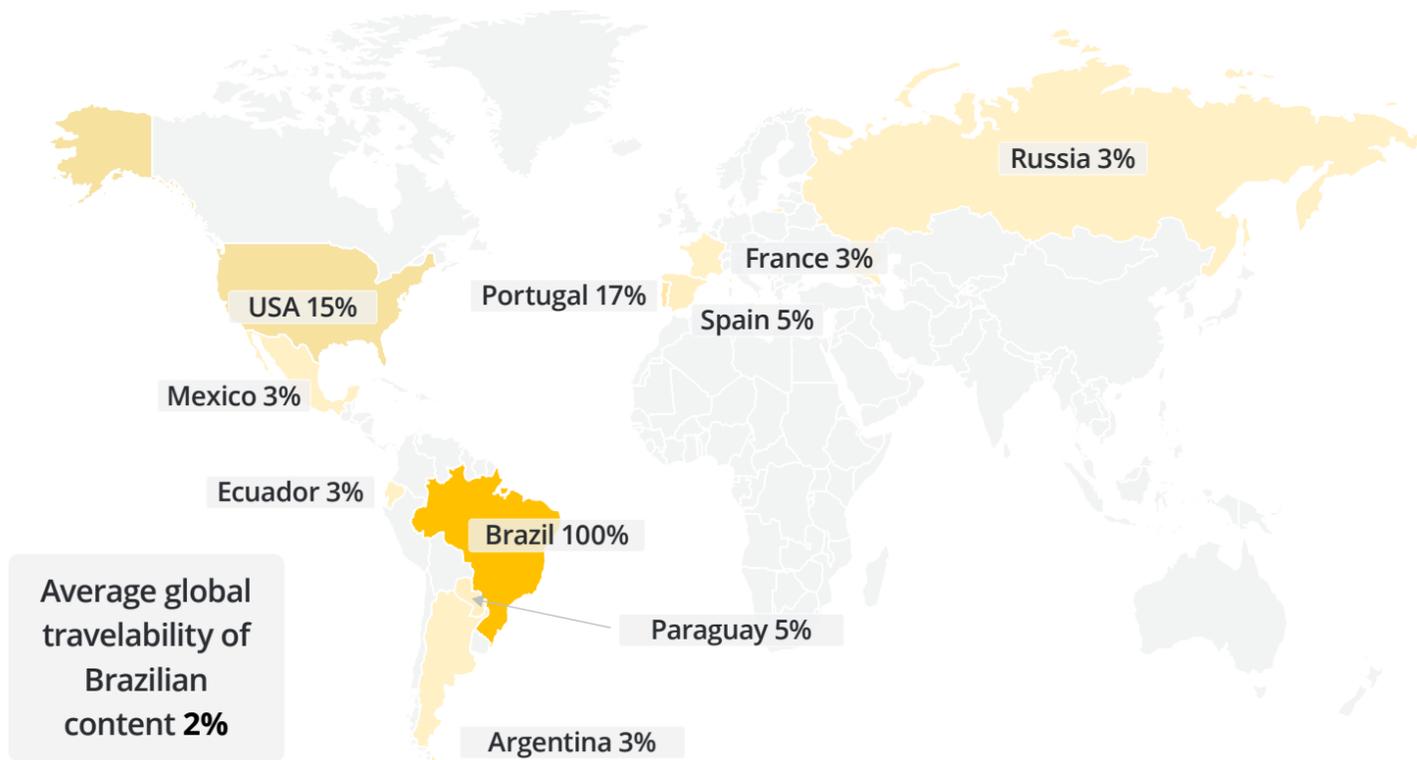
NOTE: The insights presented in this section are based on the entire available Parrot Analytics global TV demand dataset, which is comprised of 3.5 trillion data points across 100+ languages in 100+ countries.



Travelability of **Brazilian** local productions and local subgenre preferences

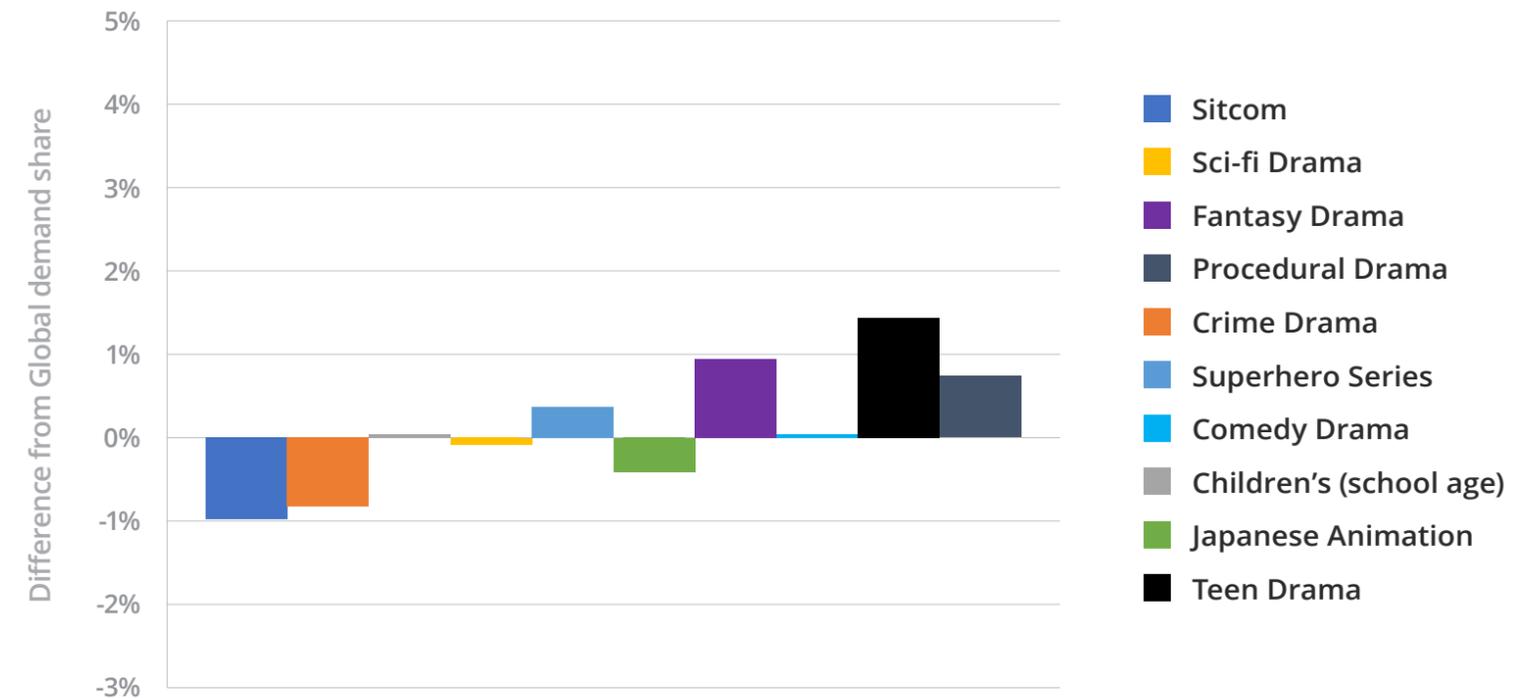
January – December, 2018

The global travelability of content produced in the Brazil



- ▶ Content from Brazil generally does not reach audiences in other markets as well as content produced in other markets.
- ▶ Brazilian content has a global travelability of 2.4%, the lowest of the 10 markets in this report.
- ▶ Portugal is currently the best international market for Brazilian titles.

Most in-demand Brazilian subgenres compared to global trends

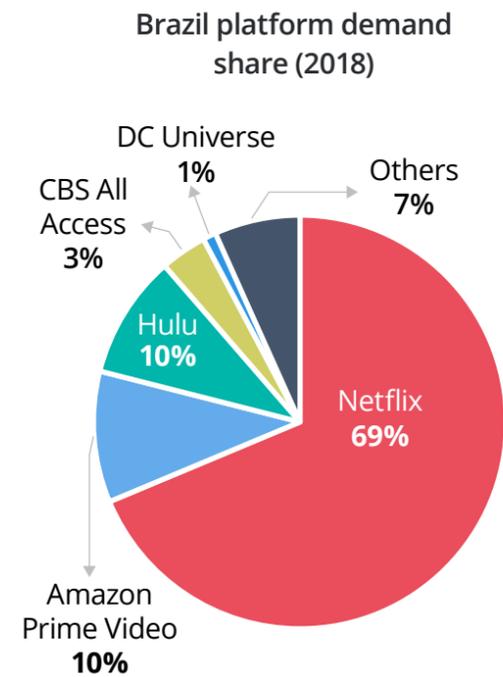


- ▶ The largest demand share is for crime drama, which accounts for 7.9% of all expressed demand in this market, 0.8% less than the global average.
- ▶ While crime dramas and sitcoms command the largest genre share, as in other markets, they have a lower demand share in Brazil than the global average.
- ▶ Teen drama does very well in Brazil, it is one of the 10 largest subgenres and has 1.4% more demand share in this market than the worldwide average.

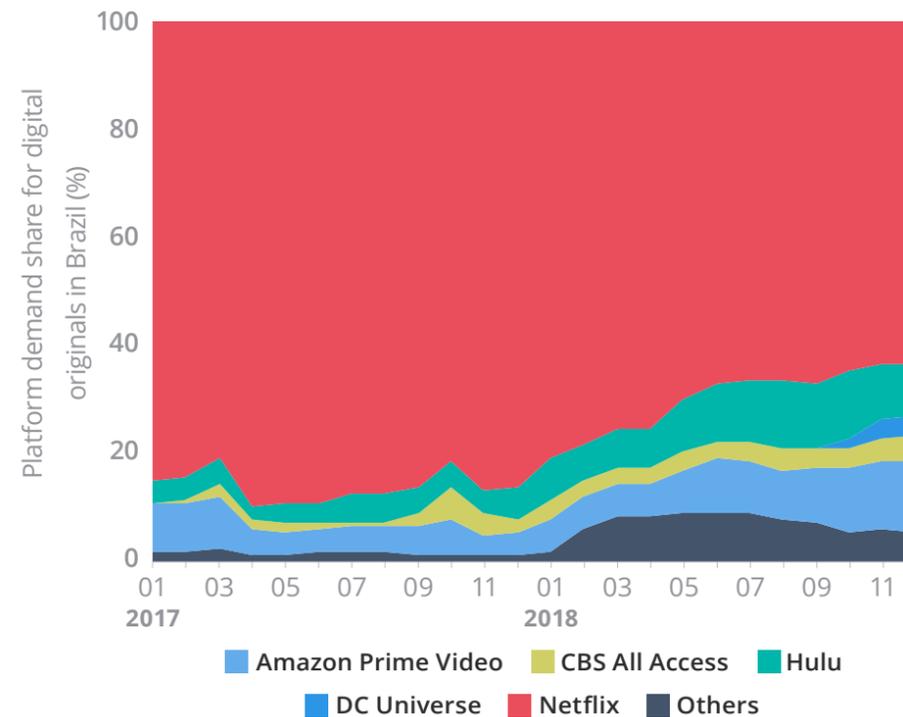
Brazil platform demand share and digital originals demand distribution

January, 2017 – December, 2018

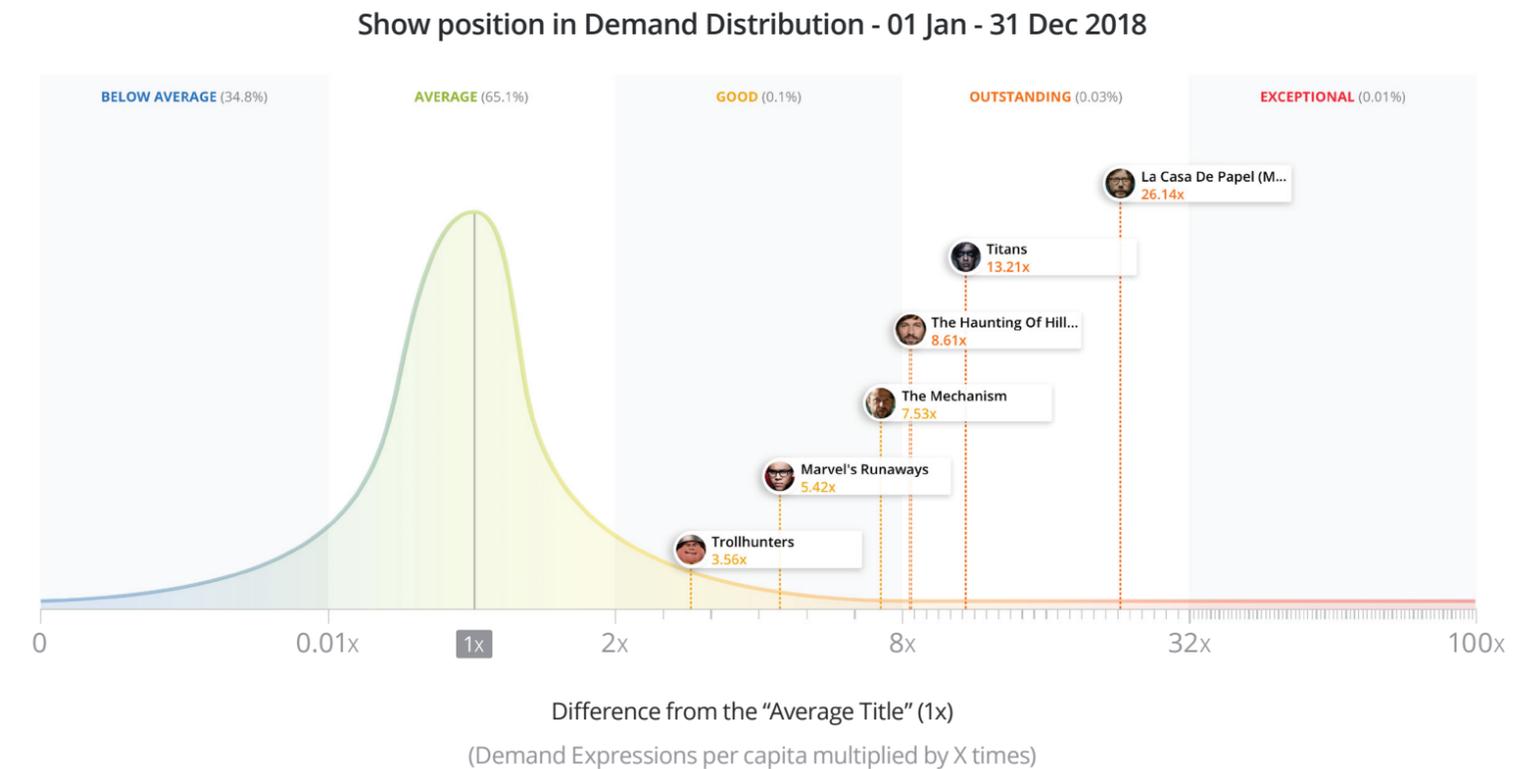
Brazil market demand share by original platform for all digital originals



Brazil platform demand share trend



Demand distribution of a selection of top digital originals in Brazil



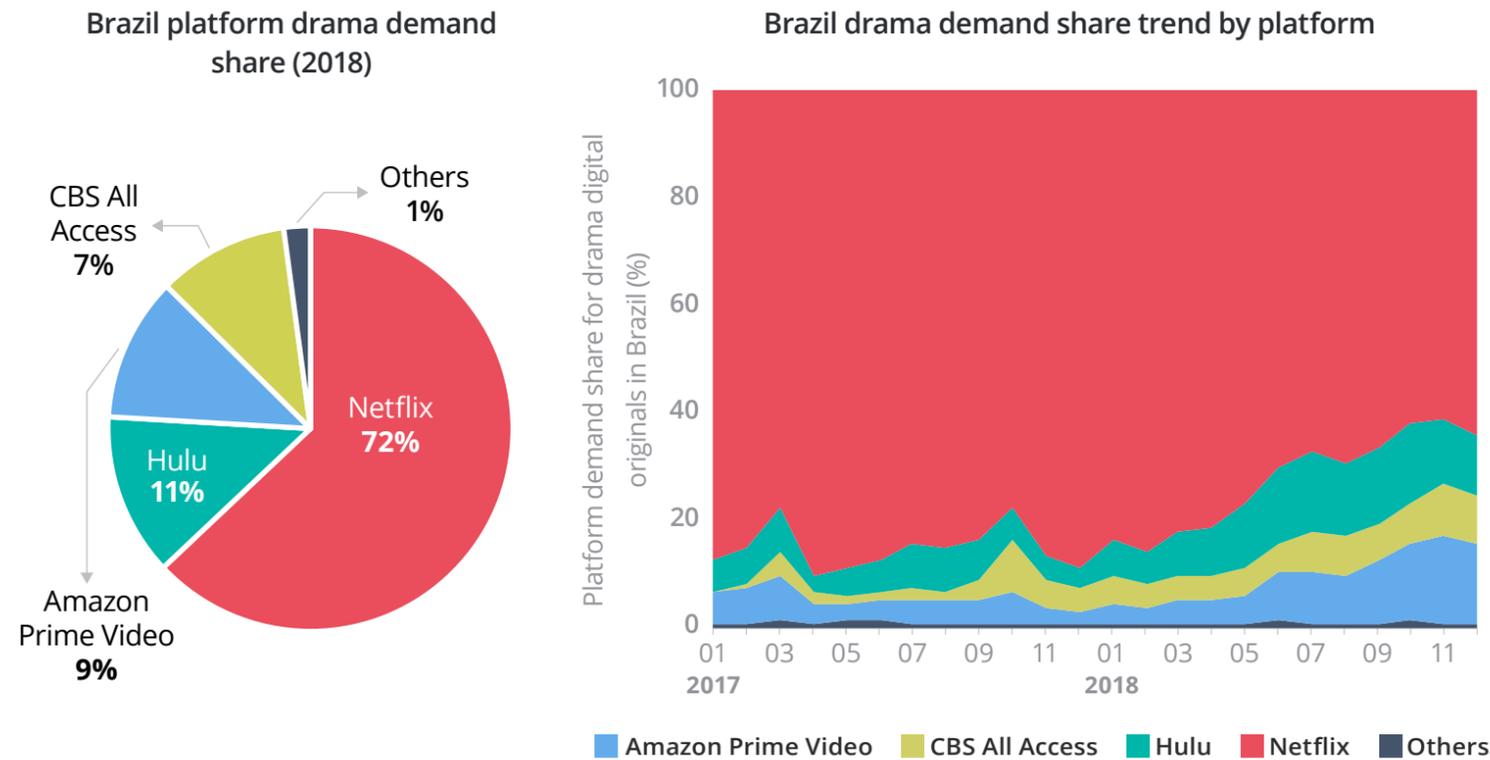
- ▶ In 2018, the majority (69%) of demand for digital original content in Brazil was for Netflix titles.
- ▶ Hulu and Prime Video both account for 10% of the demand share.
- ▶ The change in Brazil's platform demand share over time is swifter than in most markets, with the Netflix share decreasing by around 15% since the start of 2018.

- ▶ *La Casa De Papel* is the number one ranked digital original series of 2018 in Brazil, with 26 times more demand over the year than the average title in Brazil. We refer to this as "Outstanding".
- ▶ DC Universe's *Titans* and Netflix's *The Haunting Of Hill House* were also part of the 0.03% of titles classed as "Outstanding" in Brazil.
- ▶ Out of all children's titles, *Trollhunters* performs well in this market.

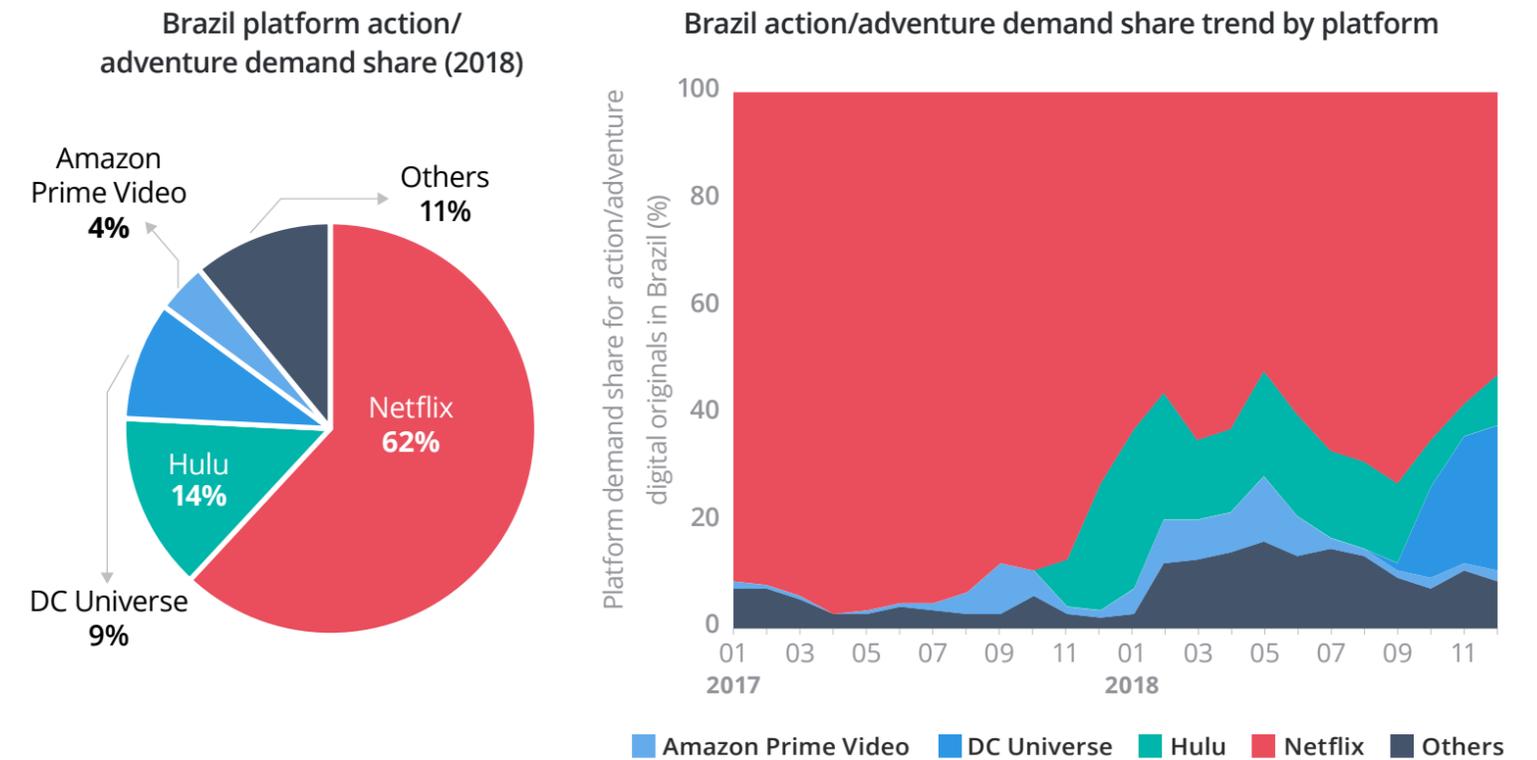
Brazil platform demand share for drama and action/adventure digital originals

January, 2017 – December, 2018

Brazil market demand share by original platform for drama digital originals



Brazil market demand share by original platform for action/adventure digital originals



- ▶ Netflix titles account for 72% of all demand expressed for digital original drama titles in Brazil in 2018.
- ▶ Hulu has the second largest demand share for drama titles in Brazil with 11%, while Prime Video has 9%.
- ▶ Competition for drama platform demand has accelerated in 2018 resulting in a decrease in Netflix's share of drama digital originals to around 70%.

- ▶ While Netflix has the largest Action and Adventure demand share in Brazil, at 62% it is the smallest share of all the markets in the report.
- ▶ Conversely, Brazil is the best market for Hulu action/adventure original titles, with a 14% demand share in 2018.
- ▶ DC Universe already has a 9% demand share in this market in 2018, despite only launching in mid-September 2018; its platform demand growth for action/adventure is evident in the 24 month trend chart.

Top digital original series in Brazil

January – December, 2018

The top 20 most in-demand digital original series:

Series Name	In-Market Platform*	Original Platform	Genre	Average daily Demand Expressions (DEx) in 2018
1 <i>La Casa De Papel (Money Heist)</i>	Netflix	Antena 3/Netflix	Drama	17,528,268
2 <i>Stranger Things</i>	Netflix	Netflix	Sci-Fi	11,071,019
3 <i>Galinha Pintadinha</i>	YouTube	YouTube	Children	11,011,176
4 <i>Chilling Adventures Of Sabrina</i>	Netflix	Netflix	Horror	9,795,503
5 <i>Titans</i>	Netflix	DC Universe	Action/Adventure	9,342,402
6 <i>The Handmaid's Tale</i>	Paramount Channel	Hulu	Drama	8,621,339
7 <i>13 Reasons Why</i>	Netflix	Netflix	Drama	8,185,855
8 <i>Orange Is The New Black</i>	Netflix	Netflix	Comedy Drama	7,633,249
9 <i>Sense8</i>	Netflix	Netflix	Sci-Fi	5,958,784
10 <i>The Haunting Of Hill House</i>	Netflix	Netflix	Horror	5,826,953
11 <i>Black Mirror</i>	Netflix	Netflix	Sci-Fi	5,486,431
12 <i>O Mecanismo (The Mechanism)</i>	Netflix	Netflix	Drama	5,066,178
13 <i>Cobra Kai</i>	YouTube Premium	YouTube Premium	Comedy	4,946,715
14 <i>The Last Kingdom</i>	Netflix	Netflix	Drama	4,738,443
15 <i>Narcos</i>	Netflix	Netflix	Drama	4,178,917
16 <i>Marvel's Runaways</i>	Canal Sony Brasil	Hulu	Action and Adventure	3,685,895
17 <i>Marvel's Daredevil</i>	Netflix	Netflix	Action/Adventure	3,668,619
18 <i>Marvel's Jessica Jones</i>	Netflix	Netflix	Action/Adventure	3,643,672
19 <i>The Man In The High Castle</i>	Amazon Prime Video	Amazon Prime Video	Sci-Fi	3,601,865
20 <i>Marvel's The Punisher</i>	Netflix	Netflix	Action/Adventure	3,349,719

A selection of 5 additional digital original series of interest:

22 <i>The End of the F...ing World</i>	Netflix	Netflix	Drama	3,255,444
34 <i>3%</i>	Netflix	Netflix	Drama	2,448,398
35 <i>Trollhunters</i>	Netflix	Netflix	Children	2,439,543
44 <i>Tom Clancy's Jack Ryan</i>	Amazon Prime Video	Amazon Prime Video	Drama	2,010,853
51 <i>Tell Me A Story</i>	--	CBS All Access	Drama	1,789,273

* Distributor for most recent season in case of multiple platforms

-- No platform information available, please refer to appendix

Travelability, subgenre, platform demand share and digital original trends

Canada

Learn where in the world content produced in this market is most wanted and which subgenres resonate the most with Canadians. Discover the demand share of the leading SVOD platforms over the last 2 years and explore demand for the top 20 streaming originals.

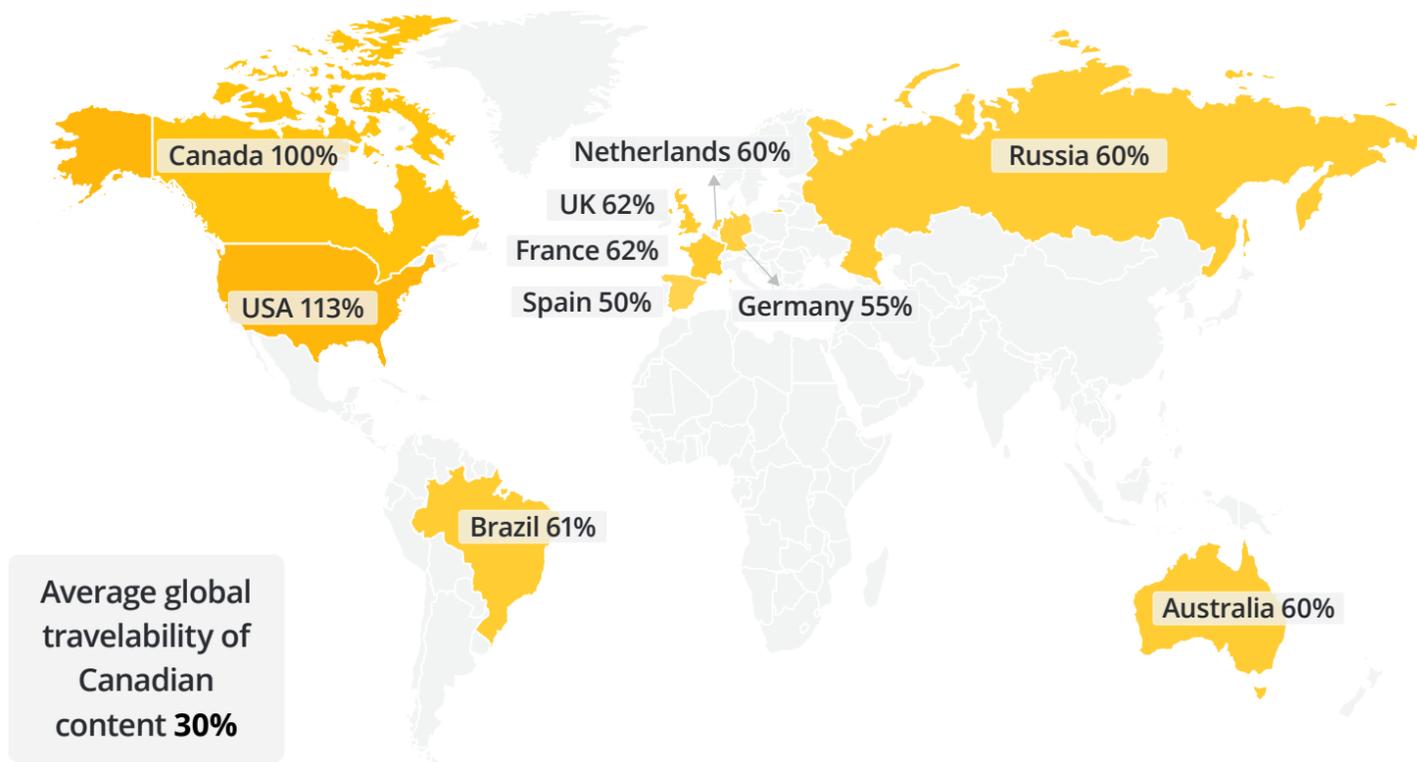
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Travelability of Canadian local productions and local subgenre preferences

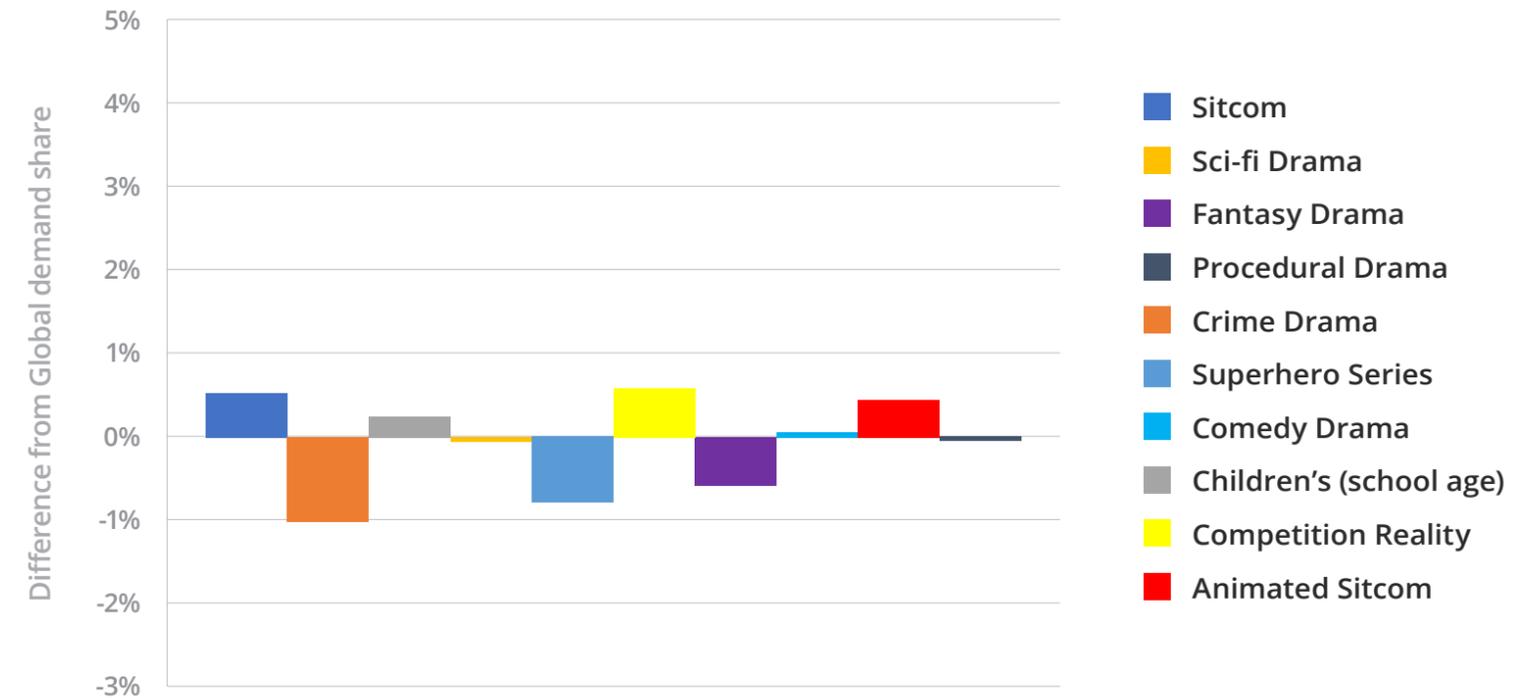
January – December, 2018

The global travelability of content produced in Canada



- ▶ Unusually, Canadian content is not most in-demand in Canada; the USA actually has 13% higher demand for Canadian titles than Canada itself.
- ▶ Canadian content travels exceptionally well. The global travelability is 29.9%, over 10% more than the content travelability of American content, and the highest travelability we have observed out of all 10 markets in this report.
- ▶ The top markets for Canadian content are located in four continents: North America, LATAM, Europe and Oceania.

Most in-demand Canadian subgenres compared to global trends

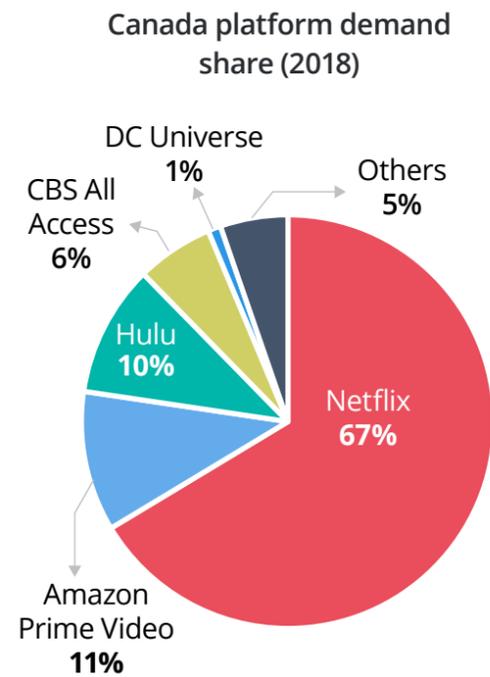


- ▶ The largest demand share is for sitcoms, which accounts for 9.3% of all expressed demand in this market, 0.5% more than the global average.
- ▶ Crime dramas, superhero and fantasy titles are all high-demand subgenres, but have a lower demand share in Canada than the global average.
- ▶ Competition reality titles are more in demand in Canada than in most markets.

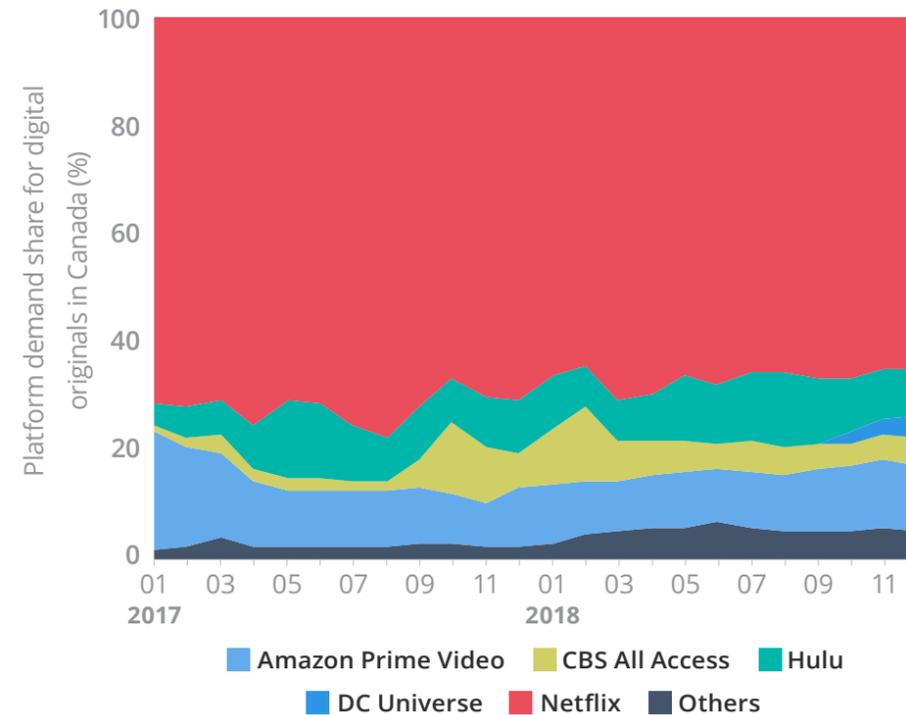
Canada platform demand share and digital originals demand distribution

January, 2017 – December, 2018

Canada market demand share by original platform for all digital originals

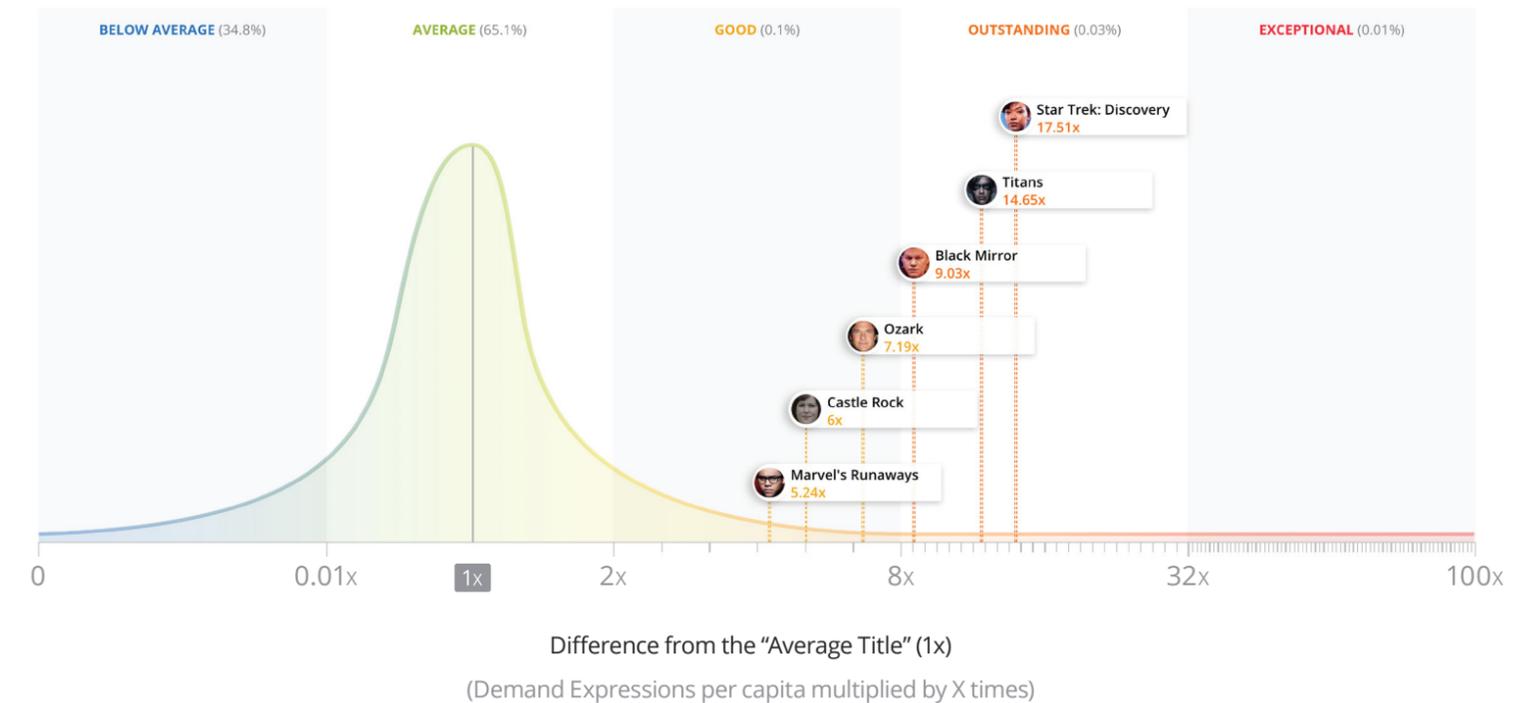


Canada platform demand share trend



Demand distribution of a selection of top digital originals in Canada

Show position in Demand Distribution - 01 Jan - 31 Dec 2018



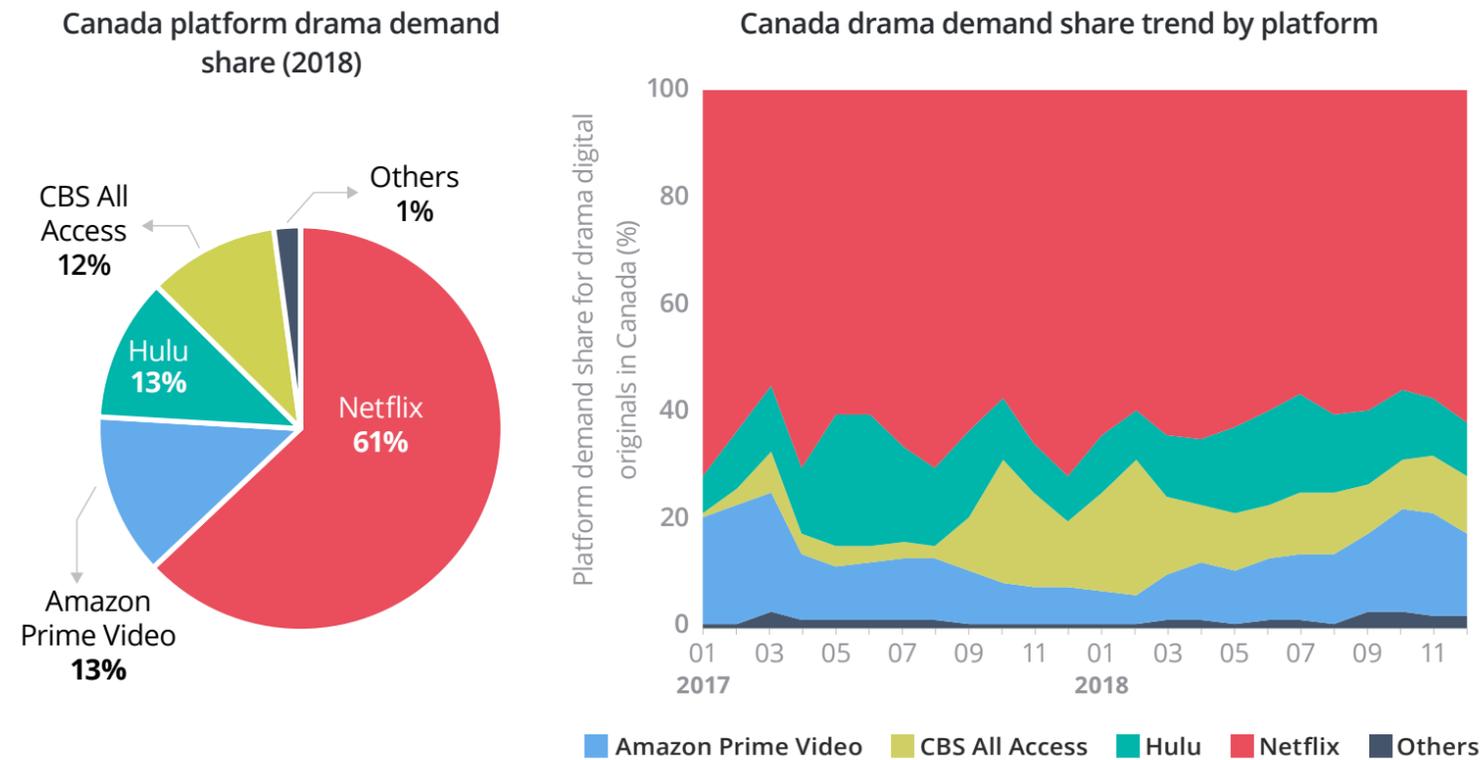
- ▶ Across all genres of digital original titles in Canada in 2018, 67% of demand was for Netflix’s digital original titles.
- ▶ Prime Video attracted 11% platform share of the market whilst Hulu originals attracted 10%.
- ▶ Canada is one of three markets where CBS All Access titles have reached a 6% share of platform demand in 2018.

- ▶ Canadians expressed the most demand for *Star Trek: Discovery* out of all digital original titles; *Star Trek: Discovery* had 17.5 times more demand than the average title in Canada in 2018.
- ▶ Another sci-fi digital original, *Black Mirror*, also placed highly in the market as the 10th most in-demand; it is rated “Outstanding” on the demand distribution chart.
- ▶ Canada’s 4th most in-demand digital original, *Titans*, is available in this market on Netflix as its original platform, *DC Universe*, is US-only for now.

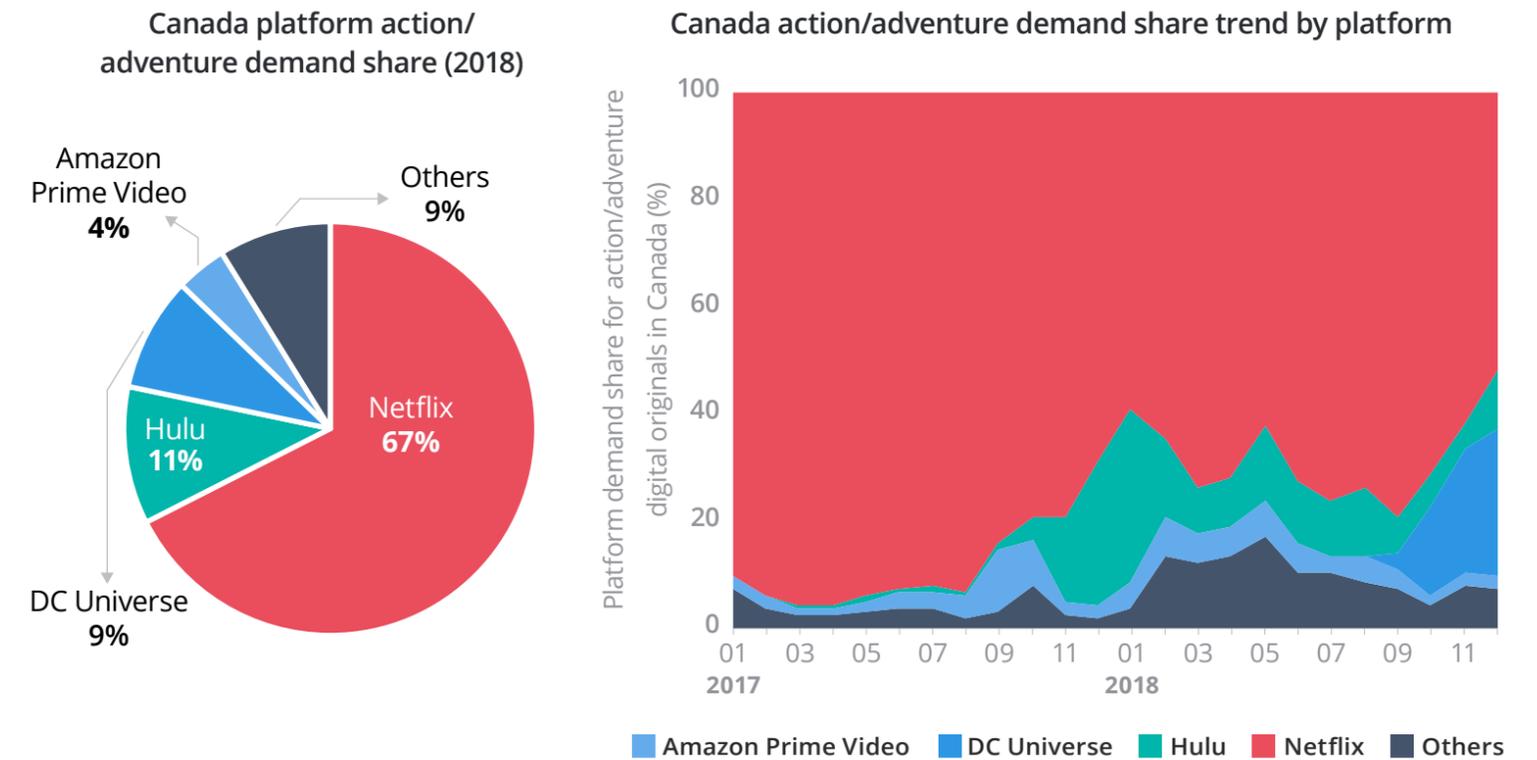
Canada platform demand share for drama and action/adventure digital originals

January, 2017 – December, 2018

Canada market demand share by original platform for drama digital originals



Canada market demand share by original platform for action/adventure digital originals



- ▶ Canada is one of the most competitive markets for drama SVOD originals.
- ▶ Although Netflix titles still account for 61% of drama digital original demand in Canada, this is lower than every other market in this report and tied with the UK.
- ▶ The 24 month trend chart shows that CBS All Access originals have been making good progress; demand has increased sharply towards the end of 2017 and this momentum has been sustained into 2018.

- ▶ The action/adventure genre is also more competitive in Canada than in other markets, although Netflix does have by far the largest demand share with 67%.
- ▶ Hulu has the second largest demand share for digital originals with 11%, followed by DC Universe with 9%.
- ▶ As in other markets, we see the impact of DC Universe’s action/adventure content in this market with demand increasing rapidly at the end of 2018.

Top digital original series in the **Canada**

January – December, 2018

The top 20 most in-demand digital original series:

Series Name	In-Market Platform*	Original Platform	Genre	Average daily Demand Expressions (DEx) in 2018
1 <i>Star Trek: Discovery</i>	CraveTV	CBS All Access	Sci-Fi	2,076,650
2 <i>Chilling Adventures Of Sabrina</i>	Netflix	Netflix	Horror	2,056,122
3 <i>Stranger Things</i>	Netflix	Netflix	Sci-Fi	1,879,837
4 <i>Titans</i>	Netflix	DC Universe	Action/Adventure	1,816,191
5 <i>The Handmaid's Tale</i>	CraveTV	Hulu	Drama	1,557,374
6 <i>Orange Is The New Black</i>	Netflix	Netflix	Comedy Drama	1,449,481
7 <i>The Haunting Of Hill House</i>	Netflix	Netflix	Horror	1,413,760
8 <i>13 Reasons Why</i>	Netflix	Netflix	Drama	1,222,143
9 <i>Marvel's Daredevil</i>	Netflix	Netflix	Action/Adventure	1,174,076
10 <i>Black Mirror</i>	Netflix	Netflix	Sci-Fi	1,077,379
11 <i>Narcos</i>	Netflix	Netflix	Drama	946,556
12 <i>Ozark</i>	Netflix	Netflix	Drama	889,830
13 <i>Trailer Park Boys</i>	Netflix	Netflix	Comedy	874,566
14 <i>The Grand Tour</i>	Amazon Prime Video	Amazon Prime Video	Reality	811,656
15 <i>Voltron: Legendary Defender</i>	Netflix	Netflix	Children	797,604
16 <i>Marvel's Jessica Jones</i>	Netflix	Netflix	Action/Adventure	758,902
17 <i>The Man In The High Castle</i>	Amazon Prime Video	Amazon Prime Video	Sci-Fi	755,931
18 <i>Castle Rock</i>	CraveTV	Hulu	Horror	745,185
19 <i>Altered Carbon</i>	Netflix	Netflix	Sci-Fi	699,212
20 <i>House Of Cards</i>	Netflix	Netflix	Drama	679,106

A selection of 5 additional digital original series of interest:

22 <i>Cobra Kai</i>	YouTube Premium	YouTube Premium	Comedy	673,811
25 <i>Marvel's Runaways</i>	Showcase Canada	Hulu	Action/Adventure	623,084
36 <i>Travelers</i>	Netflix	Netflix	Drama	489,523
42 <i>Frontier</i>	Netflix	Netflix	Drama	442,055
59 <i>Anne with an E</i>	Netflix	Netflix	Drama	328,361

* Distributor for most recent season in case of multiple platforms

Travelability, subgenre, platform demand share and digital original trends

France

Learn where in the world content produced in this market is most wanted and which subgenres resonate the most with people in France. Discover the demand share of the leading SVOD platforms over the last 2 years and explore demand for the top 20 streaming originals.

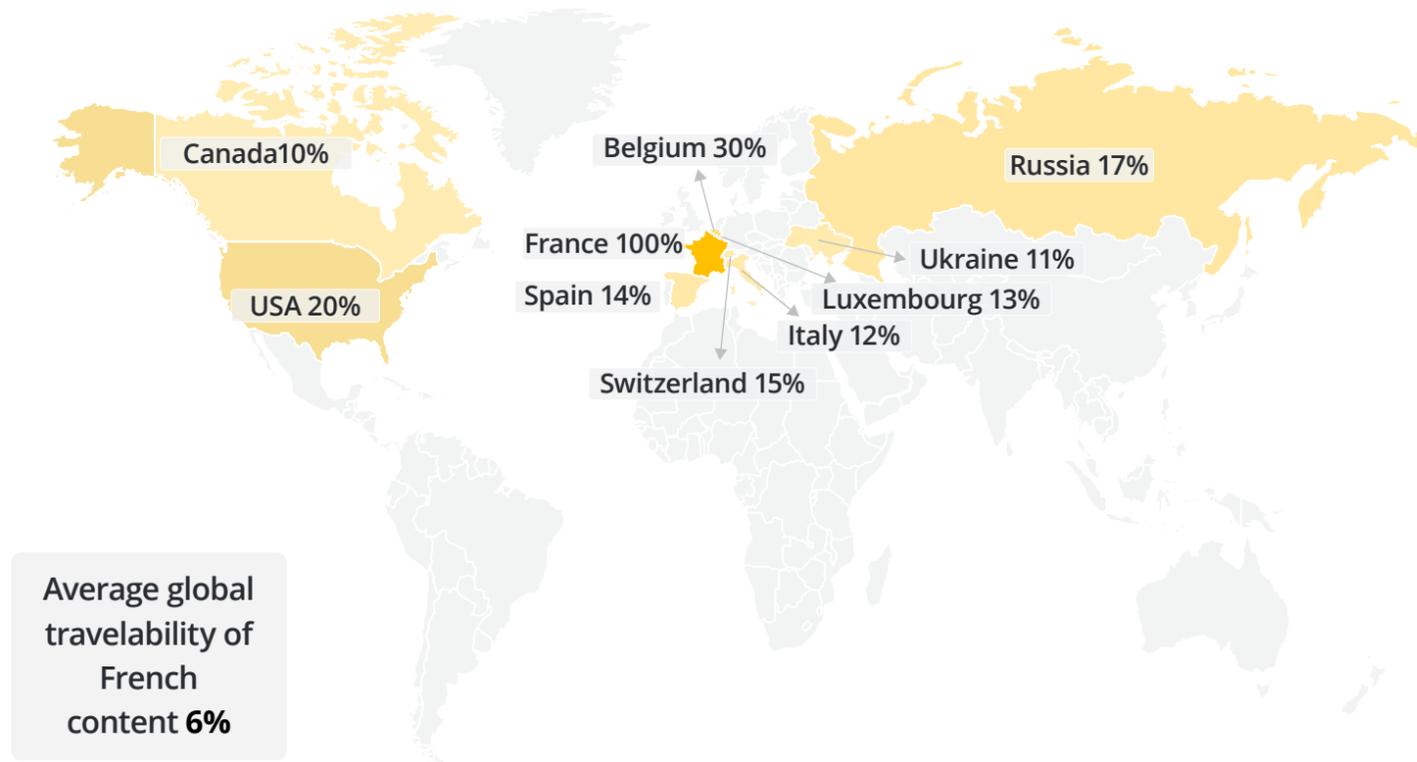
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Travelability of French local productions and local subgenre preferences

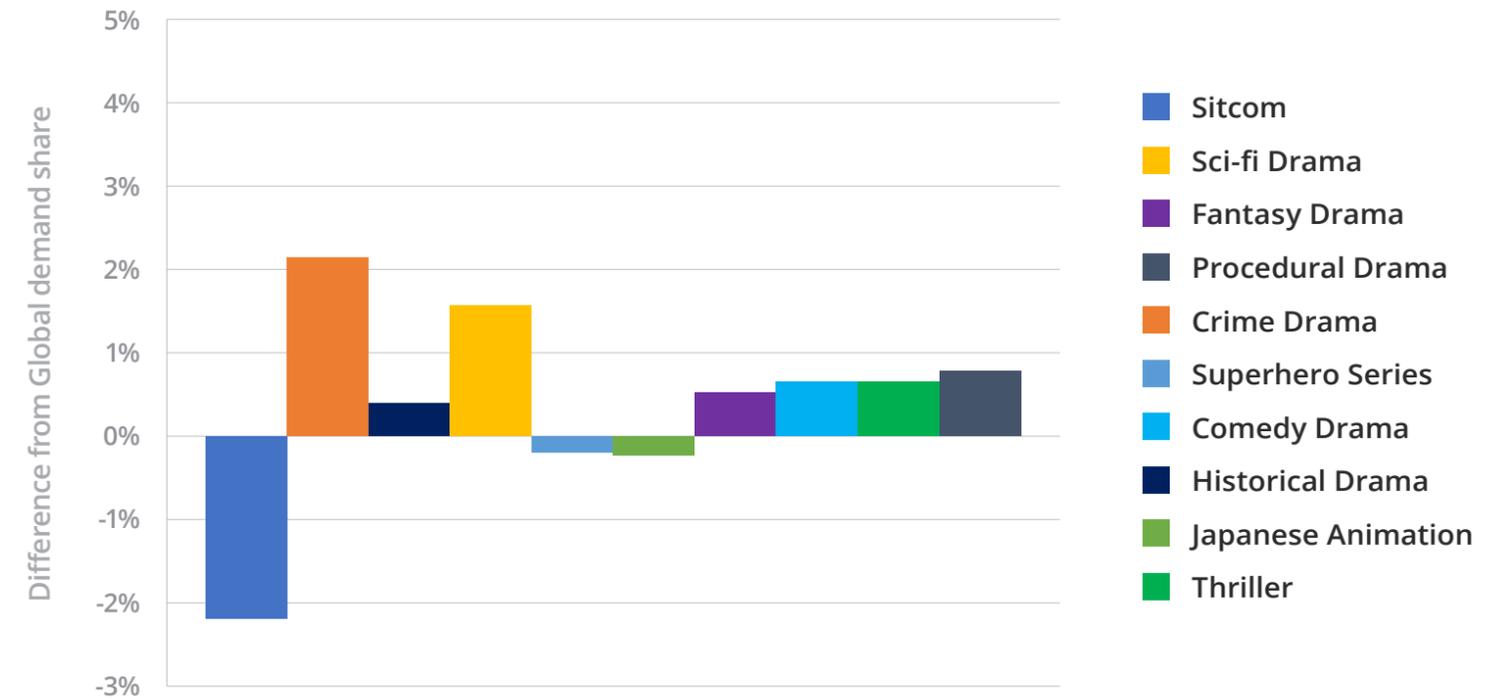
January – December, 2018

The global travelability of content produced in France



- ▶ French content travels best to other European markets and North America.
- ▶ Belgium is the best international market for content from France, the average French title will attain 30% of French demand there.
- ▶ The global travelability for France-produced content is 5.6%, approximately in the middle of the 10 countries in this report, with Canada being the highest (29.9%) and Brazil being the lowest (2.4%).

Most in-demand French subgenres compared to global trends

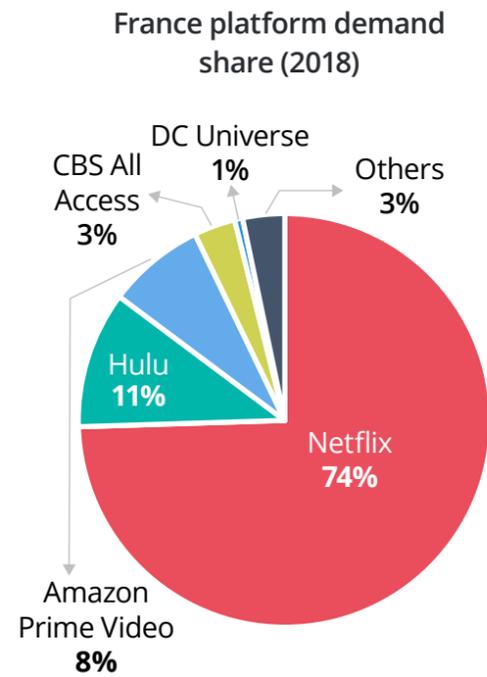


- ▶ The largest demand share is for crime drama, which accounts for 10.9% of all expressed demand in this market, 2.2% more than the global average.
- ▶ Compared to the global averages, French audiences prefer crime dramas and sci-fi dramas.
- ▶ Although they still have a high demand share, sitcoms have comparatively smaller demand share in France than the global average.

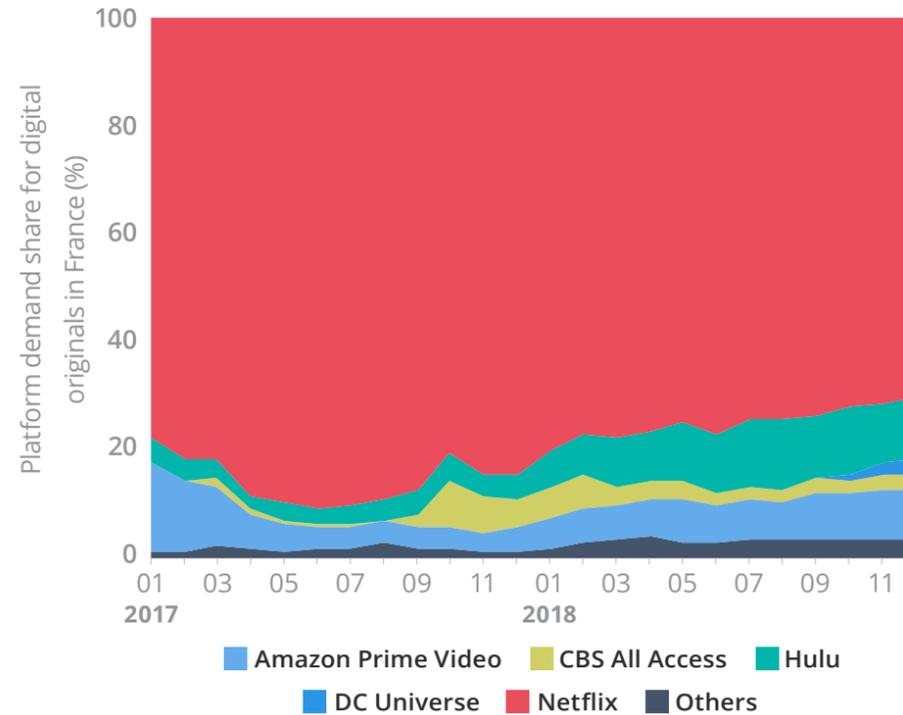
France platform demand share and digital originals demand distribution

January, 2017 – December, 2018

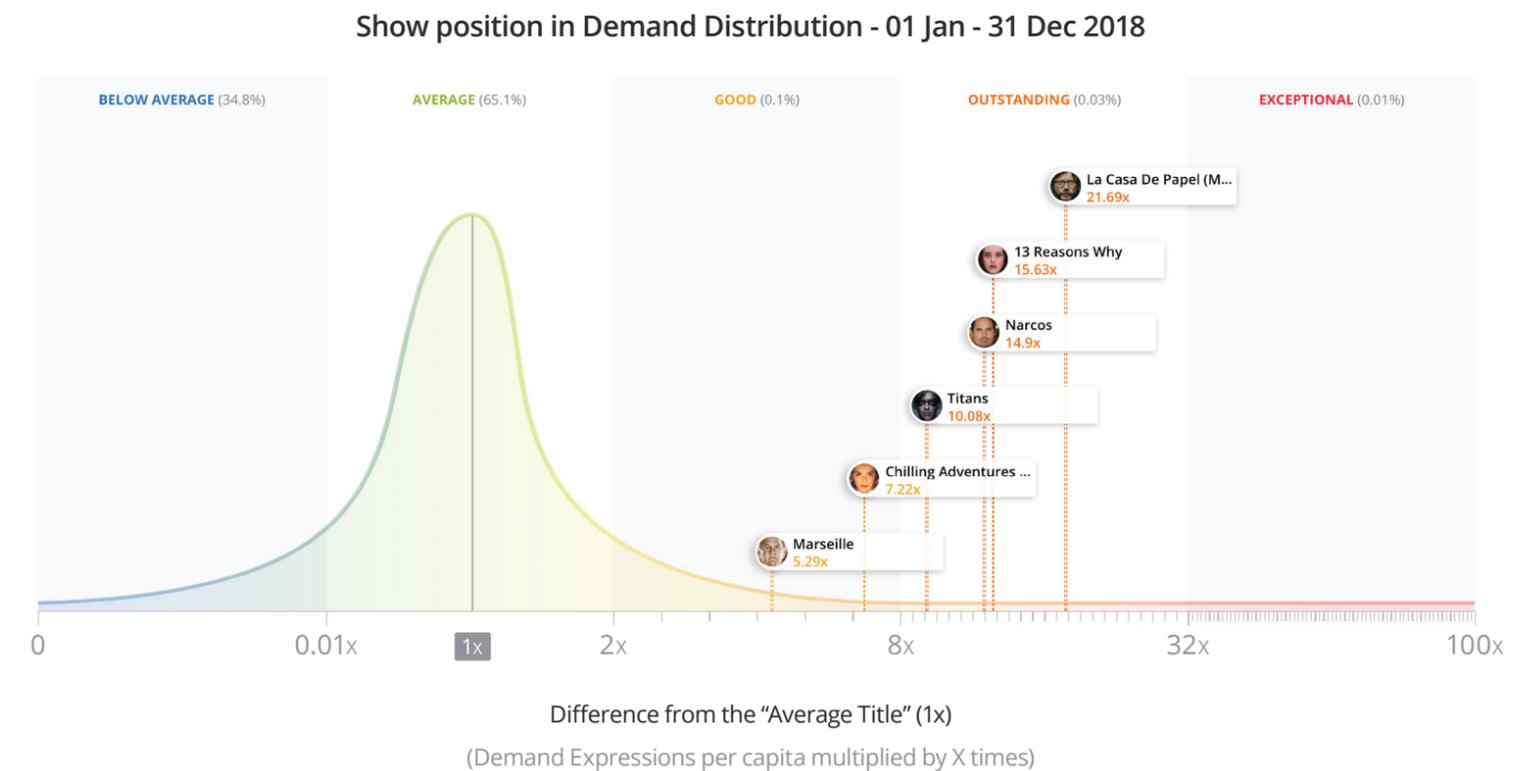
France market demand share by original platform for all digital originals



France platform demand share trend



Demand distribution of a selection of top digital originals in France



- ▶ The demand share for digital original titles from Netflix is 74% over 2018 in France.
- ▶ However, Netflix's commanding position is a decrease from May 2017, when Netflix digital original titles had a 89% demand share in France.
- ▶ Increasing demand for digital original titles from CBS All Access, DC Universe and Hulu is largely responsible for this change.

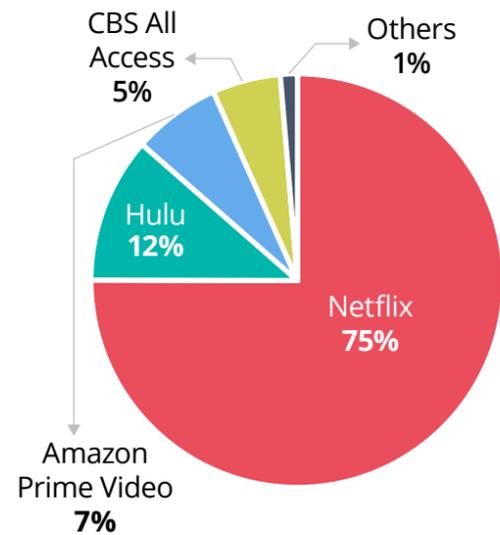
- ▶ The top digital original series by average French demand in 2018 is crime drama *La Casa De Papel*.
- ▶ Netflix teen drama *13 Reasons Why* is the fifth most in-demand title, with 15.6 times the demand for the average title in this market.
- ▶ Netflix's first French digital original *Marseille* continues to have high demand in this territory.

France platform demand share for drama and action/adventure digital originals

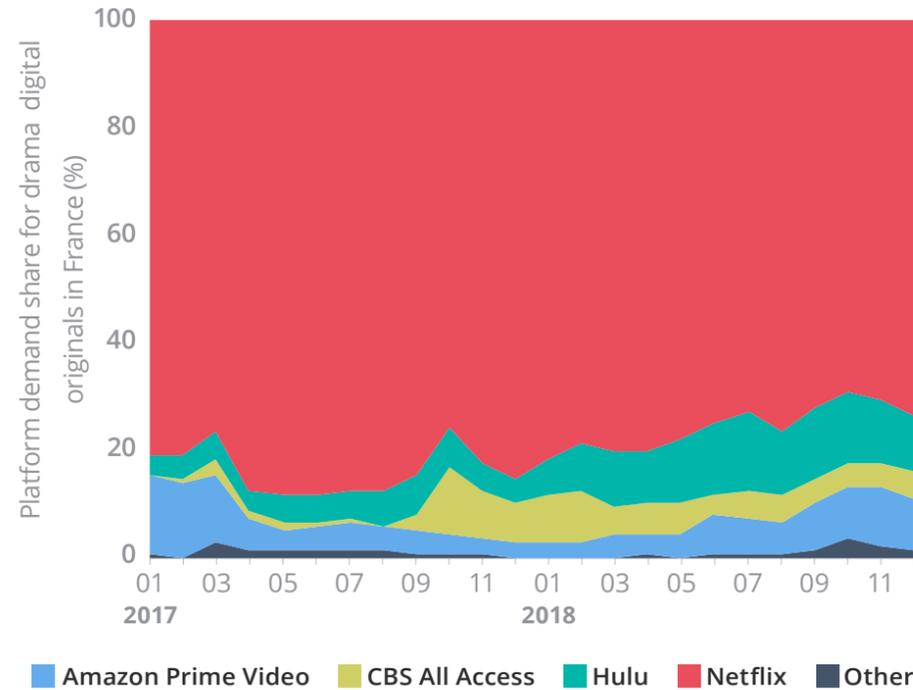
January, 2017 – December, 2018

France market demand share by original platform for drama digital originals

France platform drama demand share (2018)

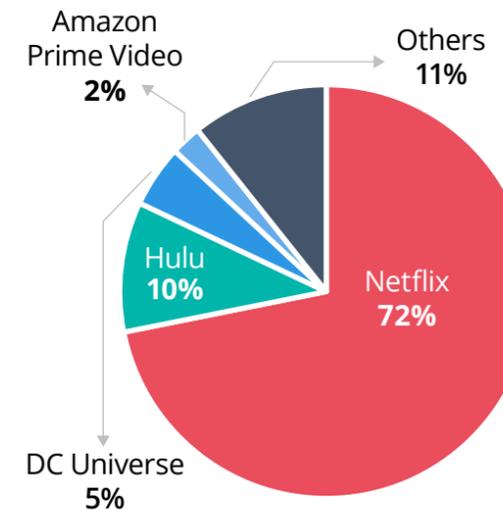


France drama demand share trend by platform

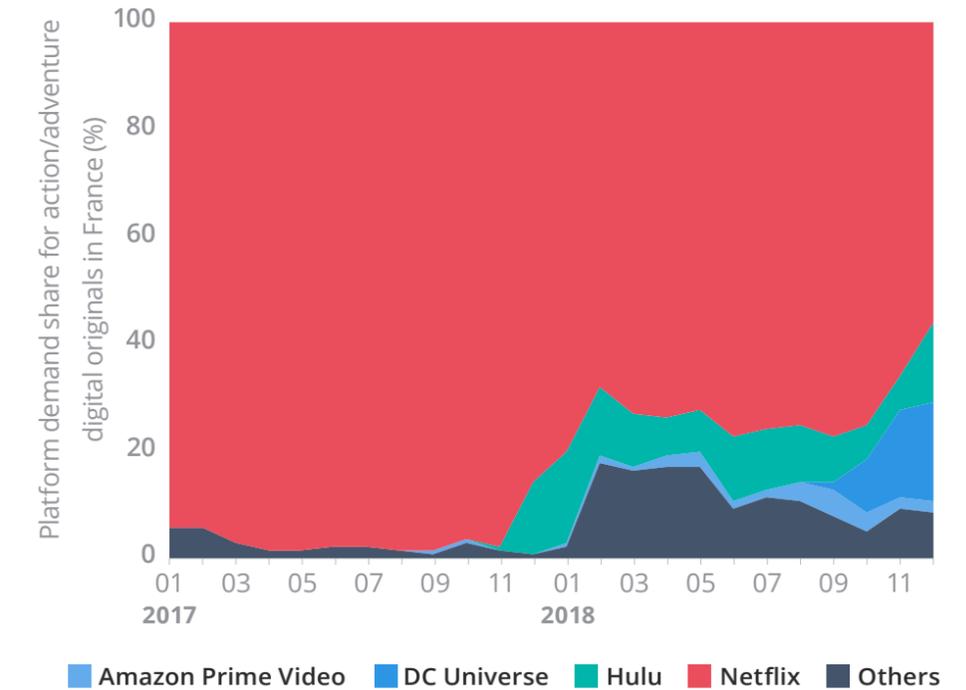


France market demand share by original platform for action/adventure digital originals

France platform action/adventure demand share (2018)



France action/adventure demand share trend by platform



- ▶ Netflix has a stronger presence in the drama SVOD space in France than in most markets covered in this report.
- ▶ Three quarters of all demand for SVOD original drama titles in France is expressed for a Netflix original title whilst Hulu and Prime Video titles account for 12% and 7% of the drama demand share, respectively.
- ▶ The 24 month demand share trend chart shows that Netflix's share of drama demand is slowly decreasing.

- ▶ 72% of demand for action/adventure digital originals in France is expressed for a title from Netflix.
- ▶ Hulu is the platform with the second largest demand share in this genre, with Hulu titles capturing 10% of the market, whilst DC Universe titles have a 5% action/adventure demand share in France.
- ▶ Netflix's share of action/adventure demand is decreasing rapidly according to our 24 month demand share trend chart.

Top digital original series in France

January – December, 2018

The top 20 most in-demand digital original series:

Series Name	In-Market Platform*	Original Platform	Genre	Average daily Demand Expressions (DEx) in 2018
1 <i>La Casa De Papel (Money Heist)</i>	Netflix	Antena 3/Netflix	Drama	4,668,611
2 <i>Stranger Things</i>	Netflix	Netflix	Sci-Fi	4,442,776
3 <i>Orange Is The New Black</i>	Netflix	Netflix	Comedy Drama	3,796,024
4 <i>Black Mirror</i>	Netflix	Netflix	Sci-Fi	3,591,400
5 <i>13 Reasons Why</i>	Netflix	Netflix	Drama	3,377,646
6 <i>Narcos</i>	Netflix	Netflix	Drama	3,217,693
7 <i>Sense8</i>	Netflix	Netflix	Sci-Fi	2,841,966
8 <i>The Handmaid's Tale</i>	OCS	Hulu	Drama	2,713,953
9 <i>The Haunting Of Hill House</i>	Netflix	Netflix	Horror	2,622,480
10 <i>Titans</i>	Netflix	DC Universe	Action/Adventure	2,278,138
11 <i>Marvel's Daredevil</i>	Netflix	Netflix	Action/Adventure	2,048,543
12 <i>Star Trek: Discovery</i>	Netflix	CBS All Access	Sci-Fi	1,866,274
13 <i>The Last Kingdom</i>	Netflix	Netflix	Drama	1,846,209
14 <i>The Crown</i>	Netflix	Netflix	Drama	1,693,513
15 <i>Marvel's Jessica Jones</i>	Netflix	Netflix	Action/Adventure	1,597,124
16 <i>Marvel's Luke Cage</i>	Netflix	Netflix	Action/Adventure	1,569,011
17 <i>Chilling Adventures Of Sabrina</i>	Netflix	Netflix	Horror	1,553,910
18 <i>Altered Carbon</i>	Netflix	Netflix	Sci-Fi	1,491,068
19 <i>House Of Cards</i>	Netflix	Netflix	Drama	1,408,539
20 <i>The Man In The High Castle</i>	Amazon Prime Video	Amazon Prime Video	Sci-Fi	1,357,414

A selection of 5 additional digital original series of interest:

26 <i>Stargate Origins</i>	--	Stargate Command	Sci-fi	1,232,922
28 <i>Diablero</i>	Netflix	Netflix	Drama	1,172,211
30 <i>Marseille</i>	Netflix	Netflix	Drama	1,139,769
38 <i>The Looming Tower</i>	Amazon Prime Video	Hulu	Drama	852,762
56 <i>Safe</i>	C8	Netflix	Drama	585,168

* Distributor for most recent season in case of multiple platforms

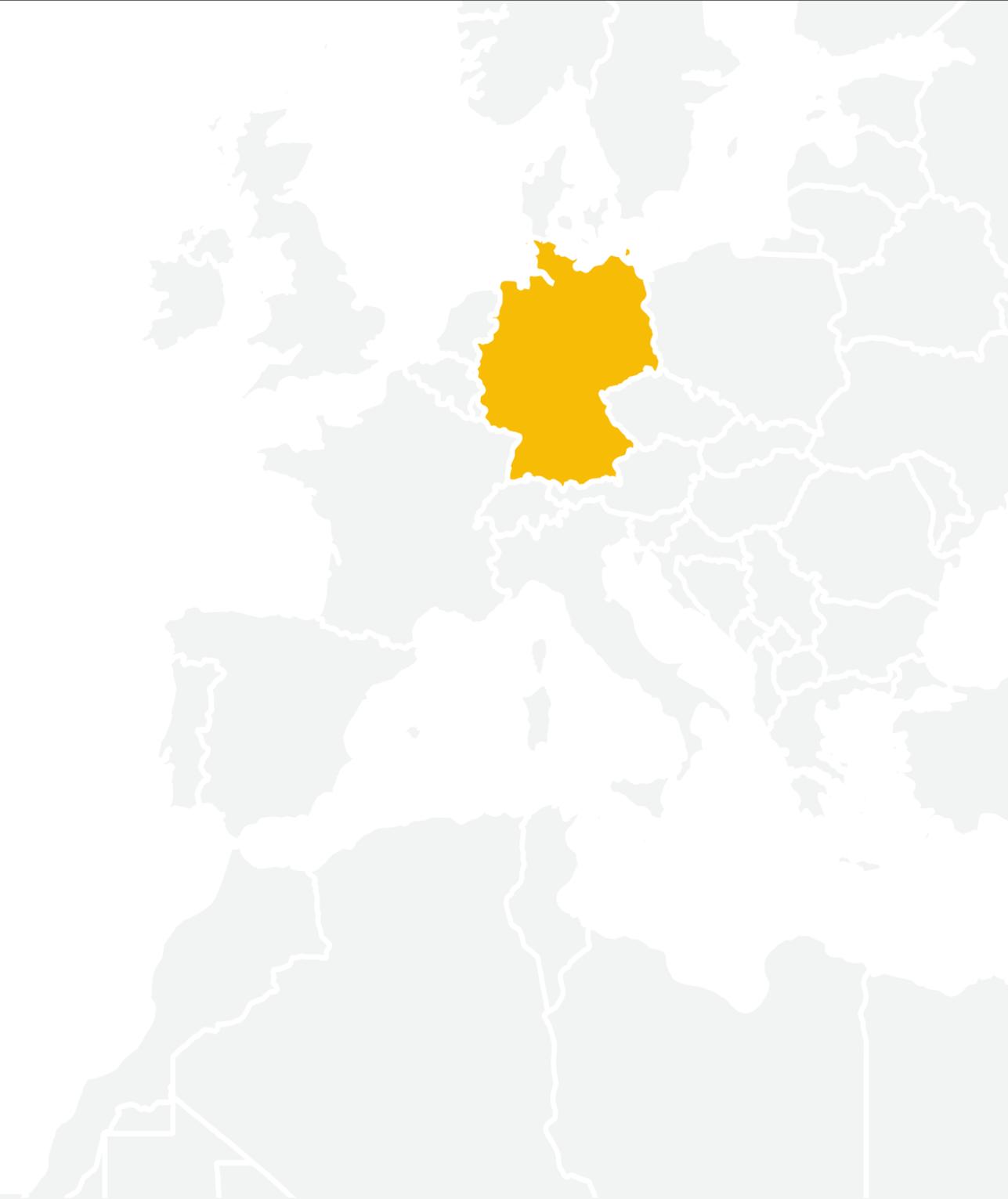
-- No platform information available, please refer to appendix

Travelability, subgenre, platform demand share and digital original trends

Germany

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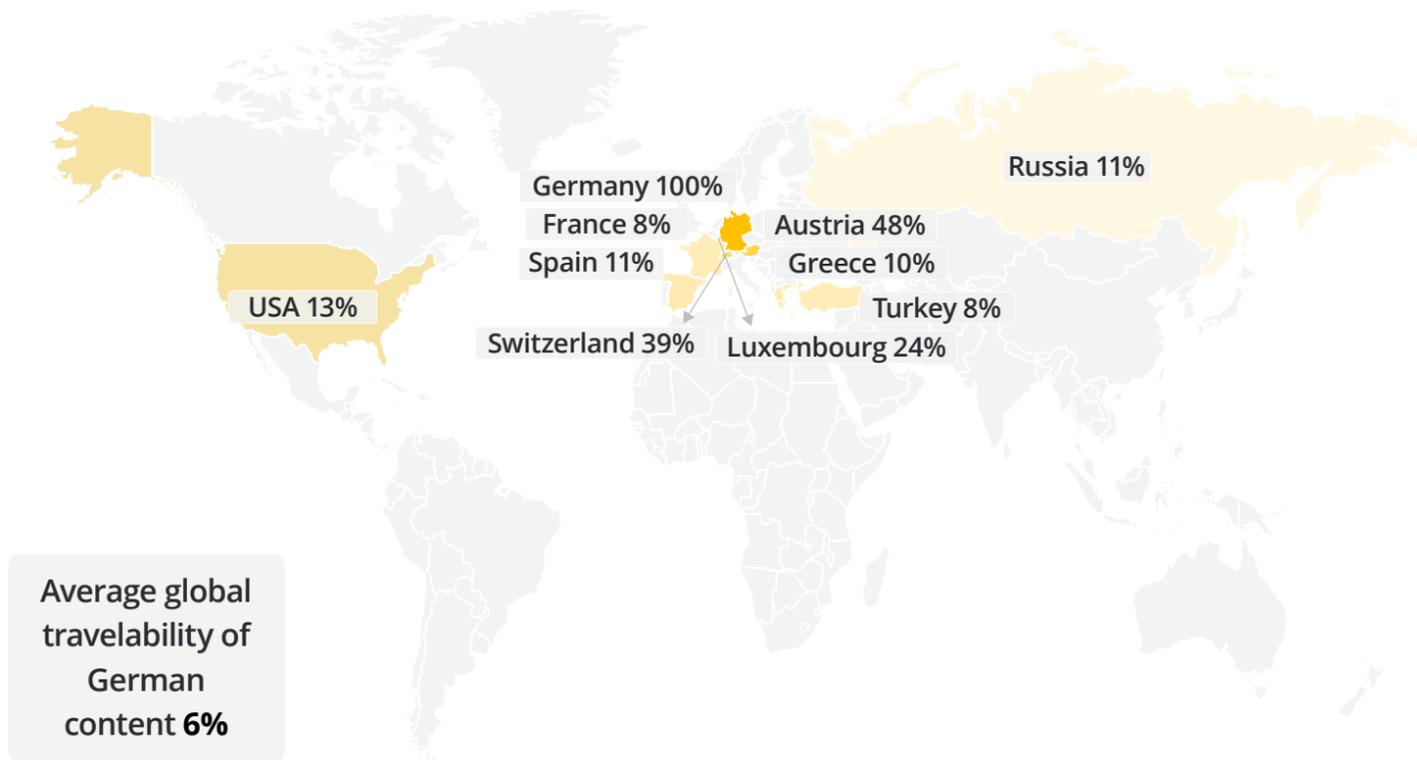
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Travelability of German local productions and local subgenre preferences

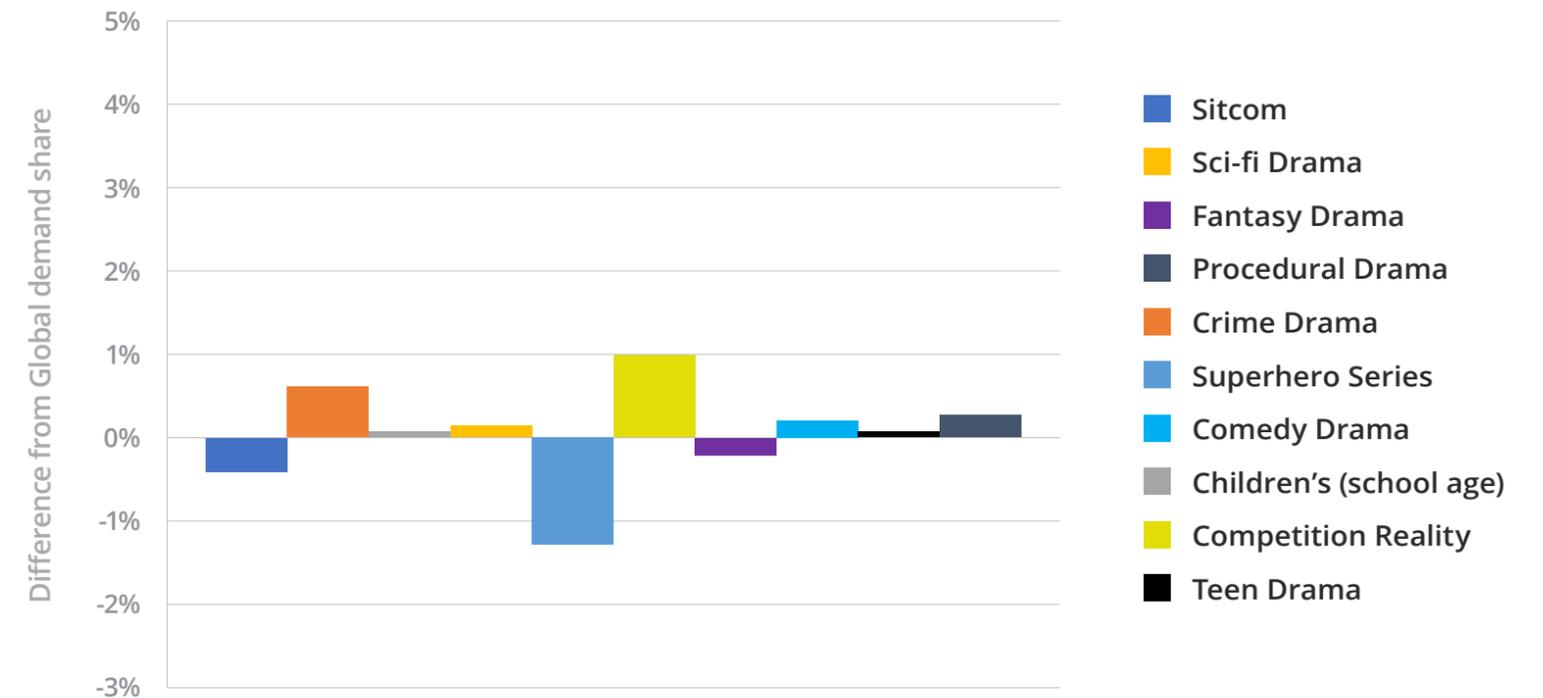
January – December, 2018

The global travelability of content produced in Germany



- ▶ As might be expected, content from Germany performs best in the DACH countries of Germany, Austria and Switzerland.
- ▶ Content from Germany travels better to the USA (13%) than to France (8%).
- ▶ Globally, German content has 5.6% travelability, equal to French content and approximately in the middle of the 10 countries in this report, with Canada being highest (29.9%) and Brazil being lowest (2.4%).

Most in-demand Germany subgenres compared to global trends

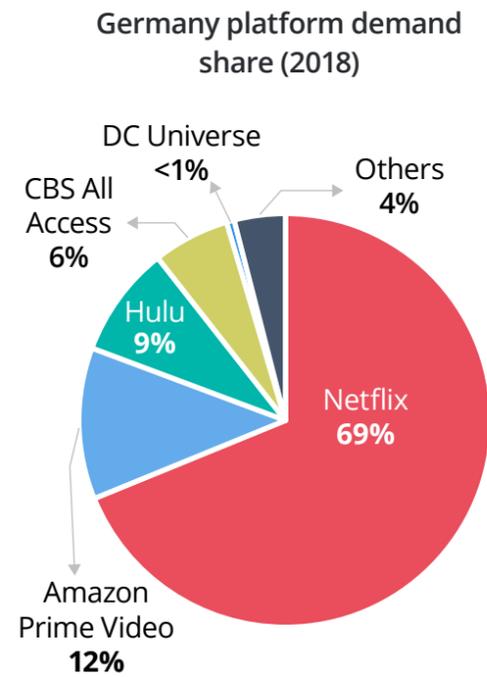


- ▶ The largest demand share is for crime drama which is 0.60% more than the global average. (Incidentally, crime dramas also account for 9.3% of all demand in this market, the most expressed for any subgenre in Germany.)
- ▶ Germans are more enthusiastic about crime dramas and competition reality titles than the worldwide average.
- ▶ Superhero series have a 1.3% lower demand share than the global average in this market.

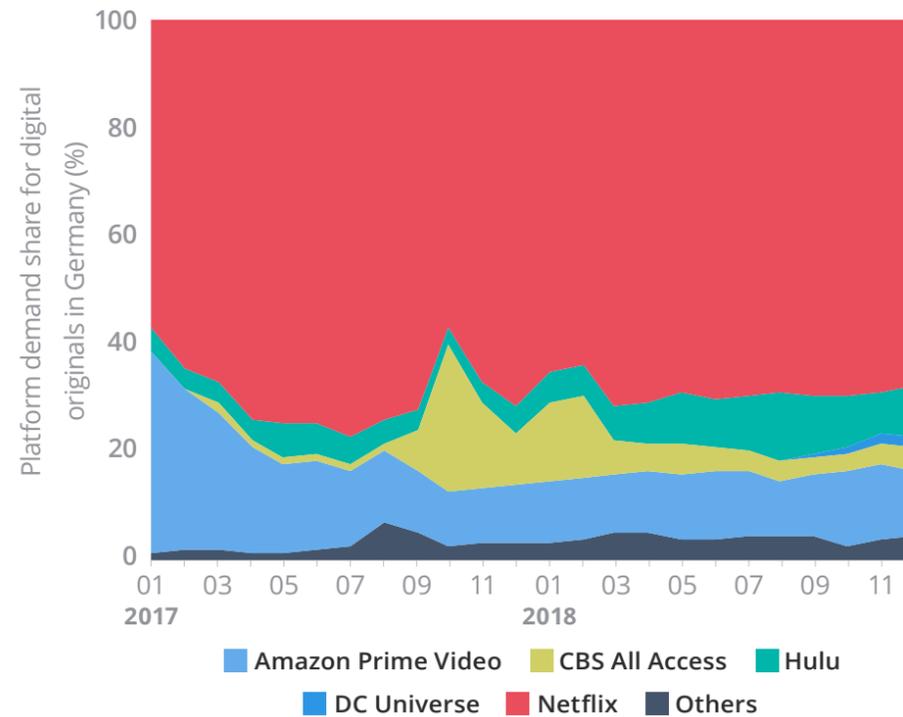
Germany platform demand share and digital originals demand distribution

January, 2017 – December, 2018

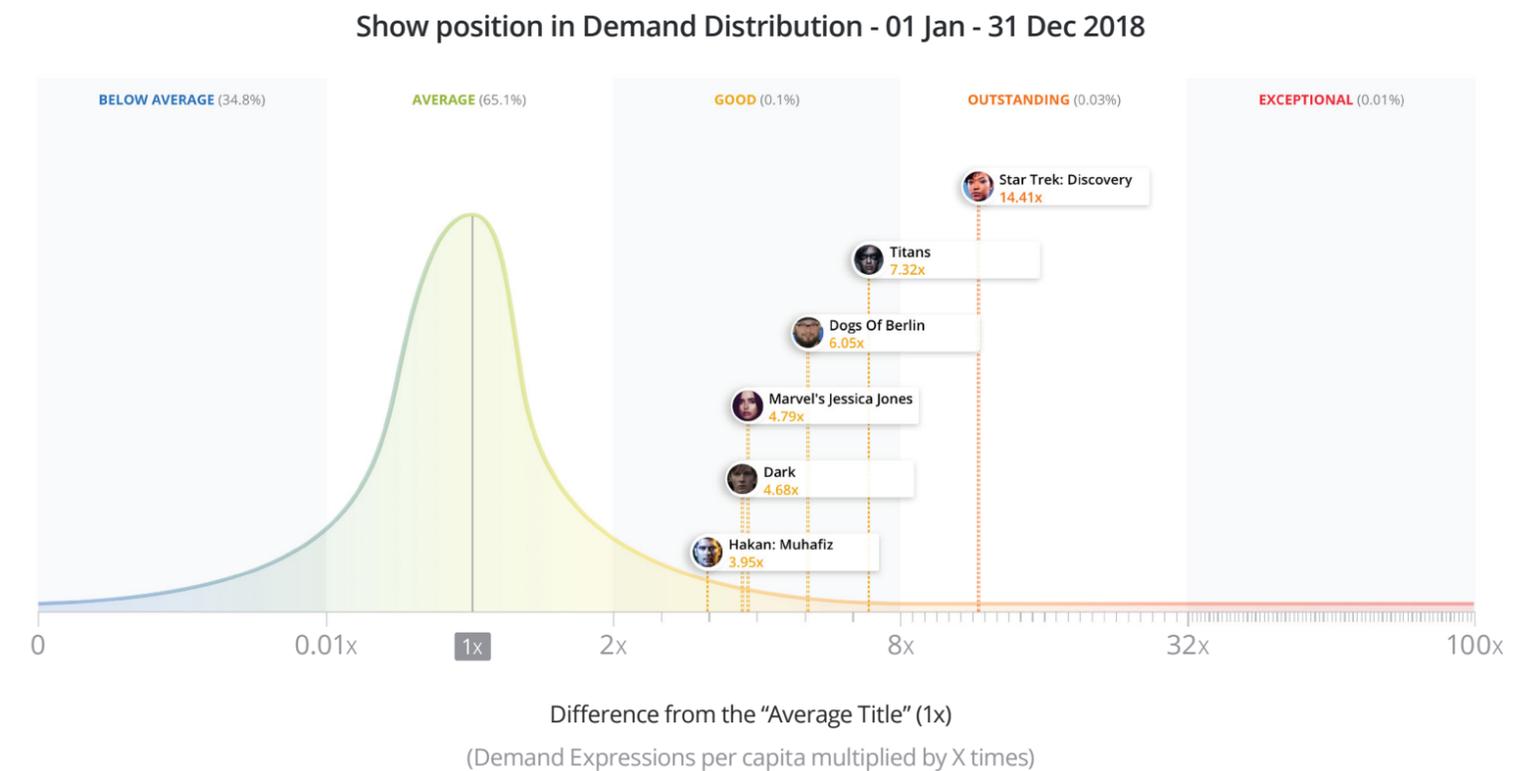
Germany market demand share by original platform for all digital originals



Germany platform demand share trend



Demand distribution of a selection of top digital originals in Germany



- ▶ Along with the UK, Germany is one of the strongest markets for Prime Video; Prime Originals have a 12% share of all digital original demand in 2018. However, Netflix continues to command the largest demand share with 69% while Hulu titles have the third largest demand share with 9%.
- ▶ CBS All Access is also strong in Germany: Along with two other markets in this report, CBS All Access titles have a 6% platform demand share in 2018.
- ▶ Hulu has made strong gains in this market in 2018 compared to the previous year.

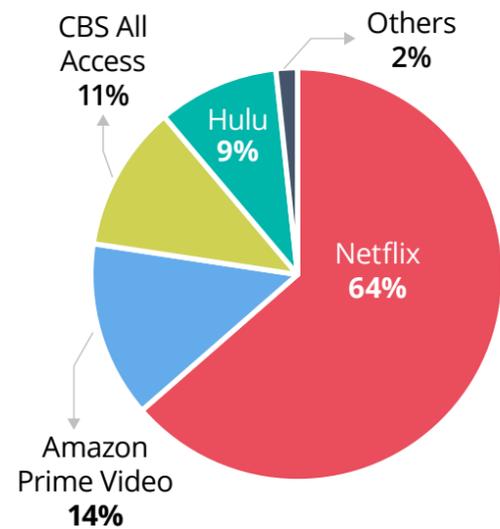
- ▶ The digital original series of any genre with the highest 2018 average demand in Germany is CBS All Access's *Star Trek: Discovery*. We rate its demand as "Outstanding".
- ▶ Netflix's German original series *Dogs Of Berlin* was only released in December yet managed to rank highly; 2017 Netflix German original *Dark* also remains a strong title in 2018.
- ▶ Netflix's Turkish original series *Hakan: Muhafiz* also ranked highly in Germany, with nearly 4 times as much demand as the average title in the market.

Germany platform demand share for drama and action/adventure digital originals

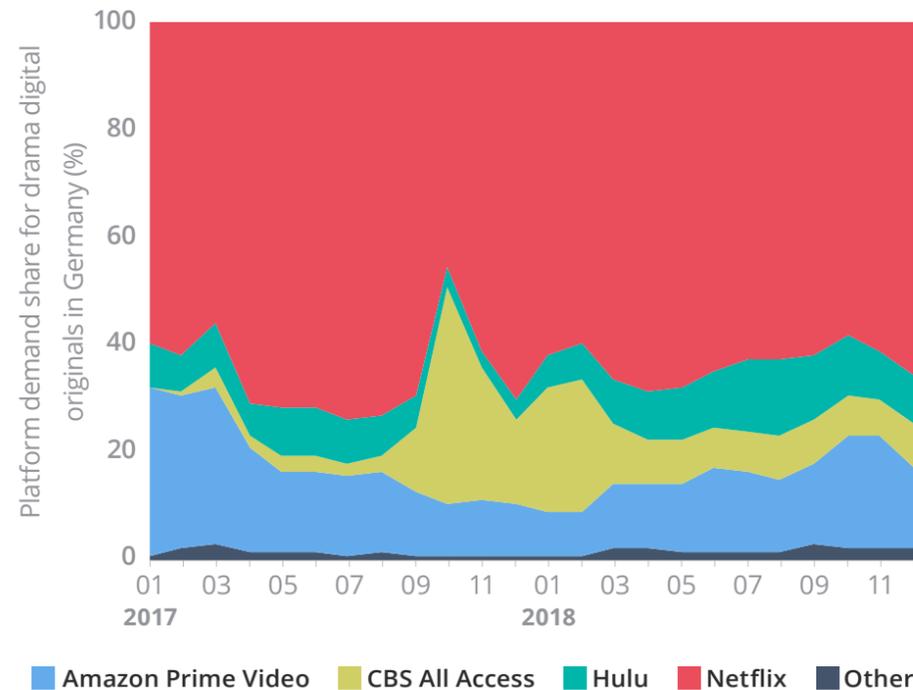
January, 2017 – December, 2018

Germany market demand share by original platform for drama digital originals

Germany platform drama demand share (2018)



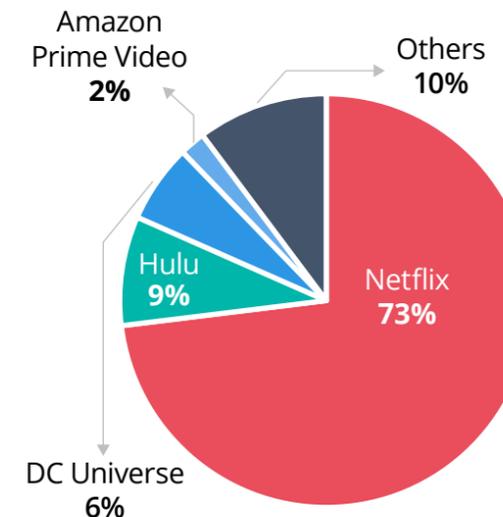
Germany drama demand share trend by platform



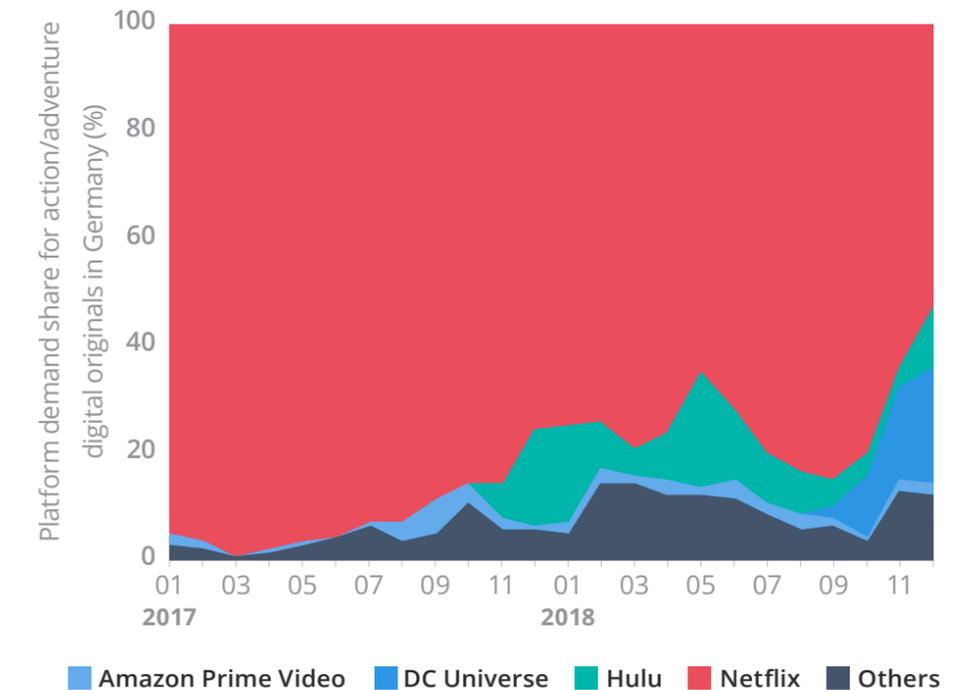
- ▶ In Germany, 64% of the demand for drama digital original titles is expressed for titles from Netflix.
- ▶ With 14% of the platform demand share, Germany is the best market for Prime Video drama titles in this report whilst CBS All Access has the third largest drama demand share with 11%.
- ▶ The 24 month trend chart shows that Netflix's share of demand for its drama digital originals has been slowly eroded since mid 2017 in this territory.

Germany market demand share by original platform for action/adventure digital originals

Germany platform action/adventure demand share (2018)



Germany action/adventure demand share trend by platform



- ▶ 73% of the demand expressed for digital original action/adventure series in Germany is for Netflix originals.
- ▶ Hulu titles account for 9% of the genre in this market, while DC Universe titles have a 6% demand share.
- ▶ As in other markets, 2018 has been a year of change for this genre; the platform demand share for action/adventure digital originals has fluctuated dramatically resulting in a decrease in Netflix's share of demand.

Top digital original series in Germany

January – December, 2018

The top 20 most in-demand digital original series:

Series Name	In-Market Platform*	Original Platform	Genre	Average daily Demand Expressions (DEx) in 2018
1 <i>Star Trek: Discovery</i>	Netflix	CBS All Access	Sci-Fi	3,905,620
2 <i>Stranger Things</i>	Netflix	Netflix	Sci-Fi	3,403,890
3 <i>Chilling Adventures Of Sabrina</i>	Netflix	Netflix	Horror	3,297,054
4 <i>Orange Is The New Black</i>	Netflix	Netflix	Comedy Drama	2,748,398
5 <i>13 Reasons Why</i>	Netflix	Netflix	Drama	2,554,096
6 <i>Titans</i>	Netflix	DC Universe	Action/Adventure	2,097,284
7 <i>Black Mirror</i>	Netflix	Netflix	Sci-Fi	2,085,175
8 <i>La Casa De Papel (Money Heist)</i>	Netflix	Antena 3/Netflix	Drama	2,084,048
9 <i>Narcos</i>	Netflix	Netflix	Drama	2,054,443
10 <i>Marvel's Daredevil</i>	Netflix	Netflix	Action/Adventure	1,764,754
11 <i>Dogs Of Berlin</i>	Netflix	Netflix	Drama	1,742,452
12 <i>The Handmaid's Tale</i>	EntertainTV	Hulu	Drama	1,629,408
13 <i>House Of Cards</i>	Netflix	Netflix	Drama	1,603,760
14 <i>The Haunting Of Hill House</i>	Netflix	Netflix	Horror	1,526,373
15 <i>Marvel's Luke Cage</i>	Netflix	Netflix	Action/Adventure	1,418,242
16 <i>The Man In The High Castle</i>	Amazon Prime Video	Amazon Prime Video	Sci-Fi	1,367,682
17 <i>Sense8</i>	Netflix	Netflix	Sci-Fi	1,359,053
18 <i>The Grand Tour</i>	Amazon Prime Video	Amazon Prime Video	Reality	1,352,173
19 <i>Marvel's Jessica Jones</i>	Netflix	Netflix	Action/Adventure	1,305,254
20 <i>Altered Carbon</i>	Netflix	Netflix	Sci-Fi	1,272,678

A selection of 5 additional digital original series of interest:

21 <i>Dark</i>	Netflix	Netflix	Drama	1,272,404
22 <i>Hakan: Muhafiz (The Protector)</i>	Netflix	Netflix	Action/Adventure	1,076,884
24 <i>The Good Fight</i>	FOX Channel	CBS All Access	Drama	1,028,597
32 <i>Bosch</i>	Amazon Prime Video	Amazon Prime Video	Drama	812,442
60 <i>You are Wanted</i>	Amazon Prime Video	Amazon Prime Video	Drama	572,579

* Distributor for most recent season in case of multiple platforms

Travelability, subgenre, platform demand share and digital original trends

Italy

Learn where in the world content produced in this market is most wanted and which subgenres resonate the most with Italians. Discover the demand share of the leading SVOD platforms over the last 2 years and explore demand for the top 20 streaming originals.

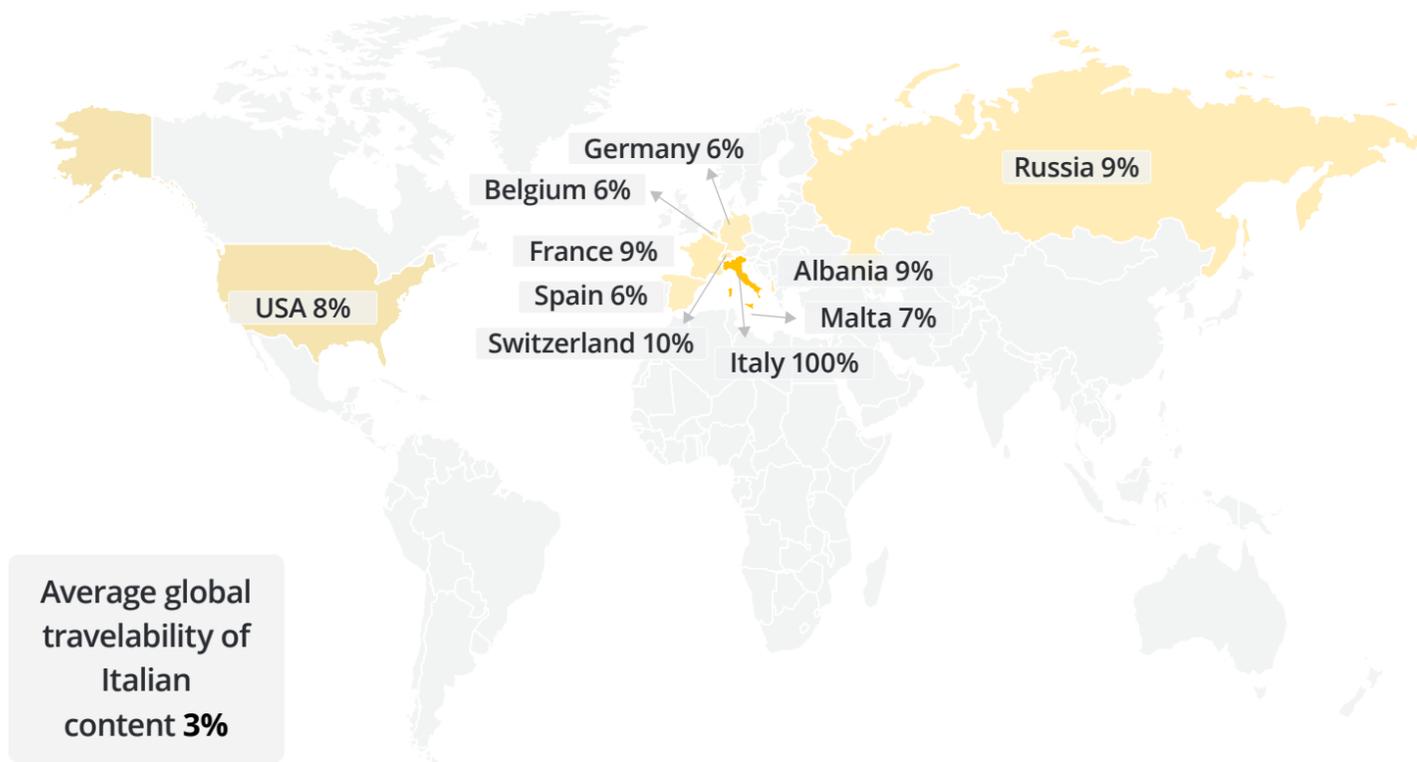
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Travelability of Italian local productions and local subgenre preferences

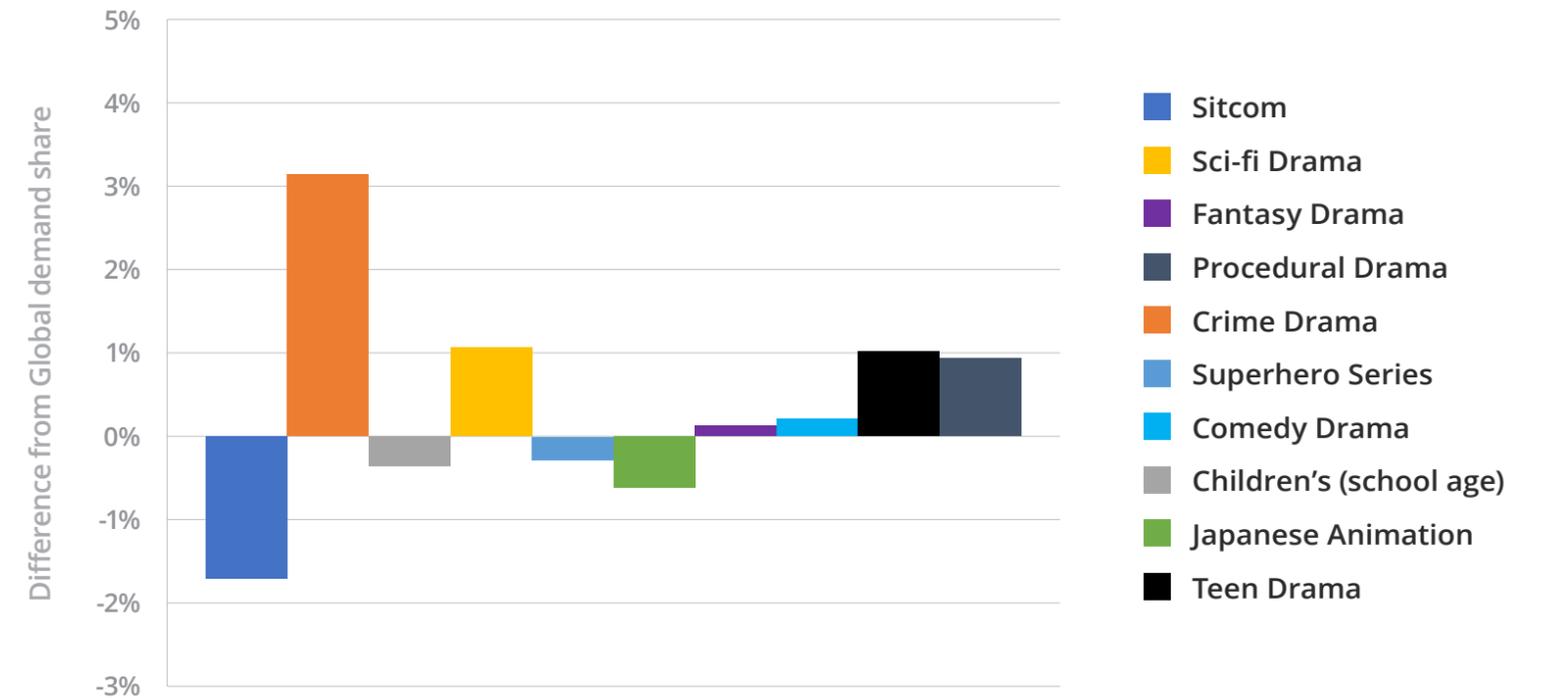
January – December, 2018

The global travelability of content produced in Italy



- ▶ Content from Italy performs best in Switzerland, where it has 10% travelability.
- ▶ Apart from the USA, all of the best countries for Italian content are in Europe.
- ▶ The global travelability of Italian produced content is 3.4%. This is lower than most of the territories profiled in this report.

Most in-demand Italian subgenres compared to global trends

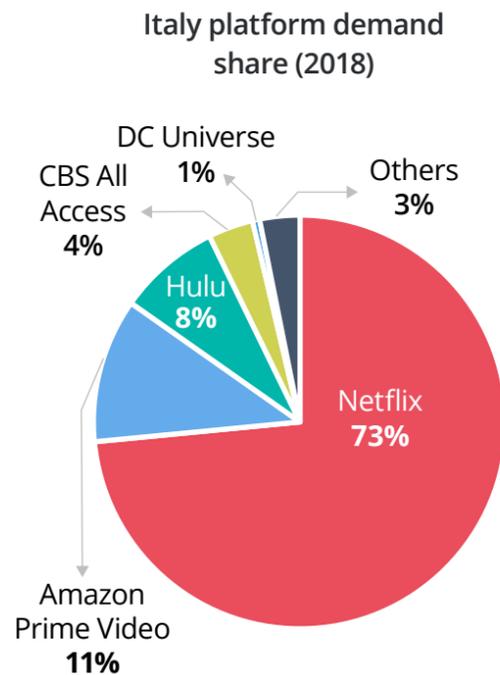


- ▶ Crime dramas are a huge subgenre in Italy: Not only does this subgenre have the highest demand share within Italy, the Italian demand share of crime dramas is also 3.14% larger than the global average.
- ▶ Sitcoms are the second largest subgenre, but the Italian demand share for this subgenre is lower than the worldwide average (1.8%).
- ▶ The third most popular subgenre in Italy is sci-fi drama, over-indexing by 1.1% compared to the global average.

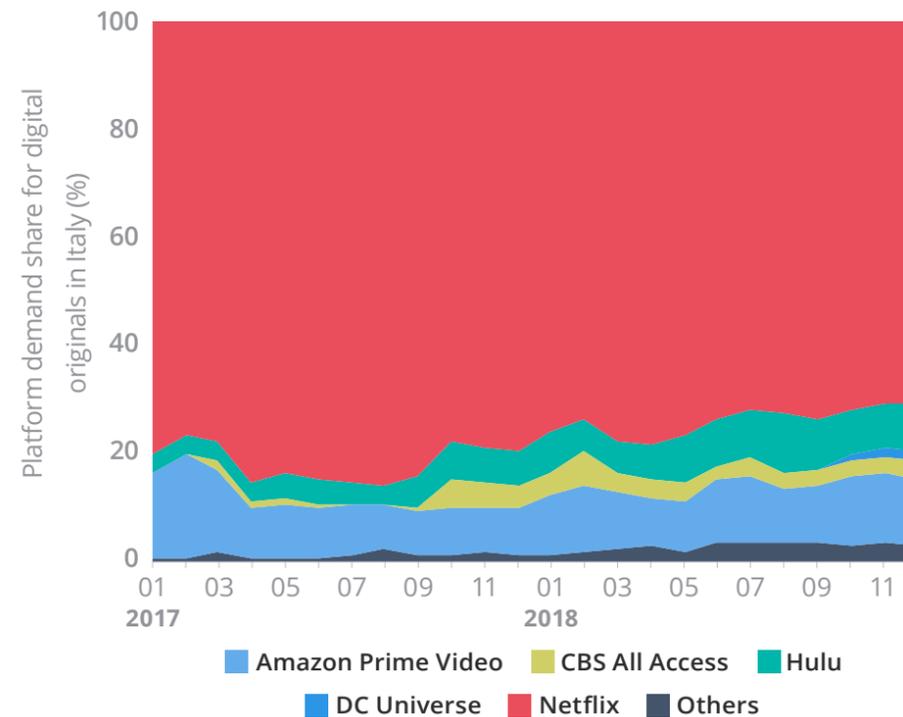
Italy platform demand share and digital originals demand distribution

January, 2017 – December, 2018

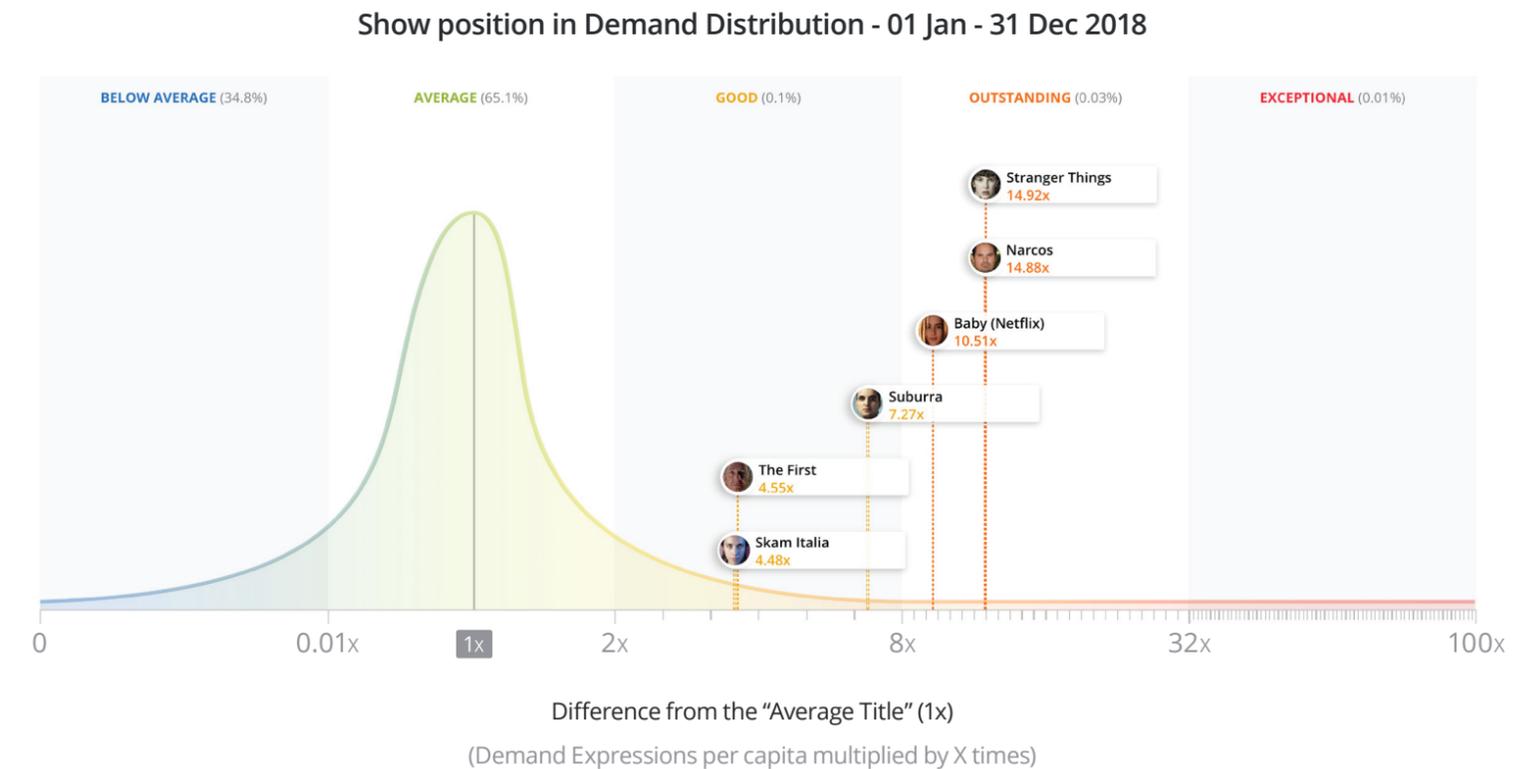
Italy market demand share by original platform for all digital originals



Italy platform demand share trend



Demand distribution of a selection of top digital originals in Italy



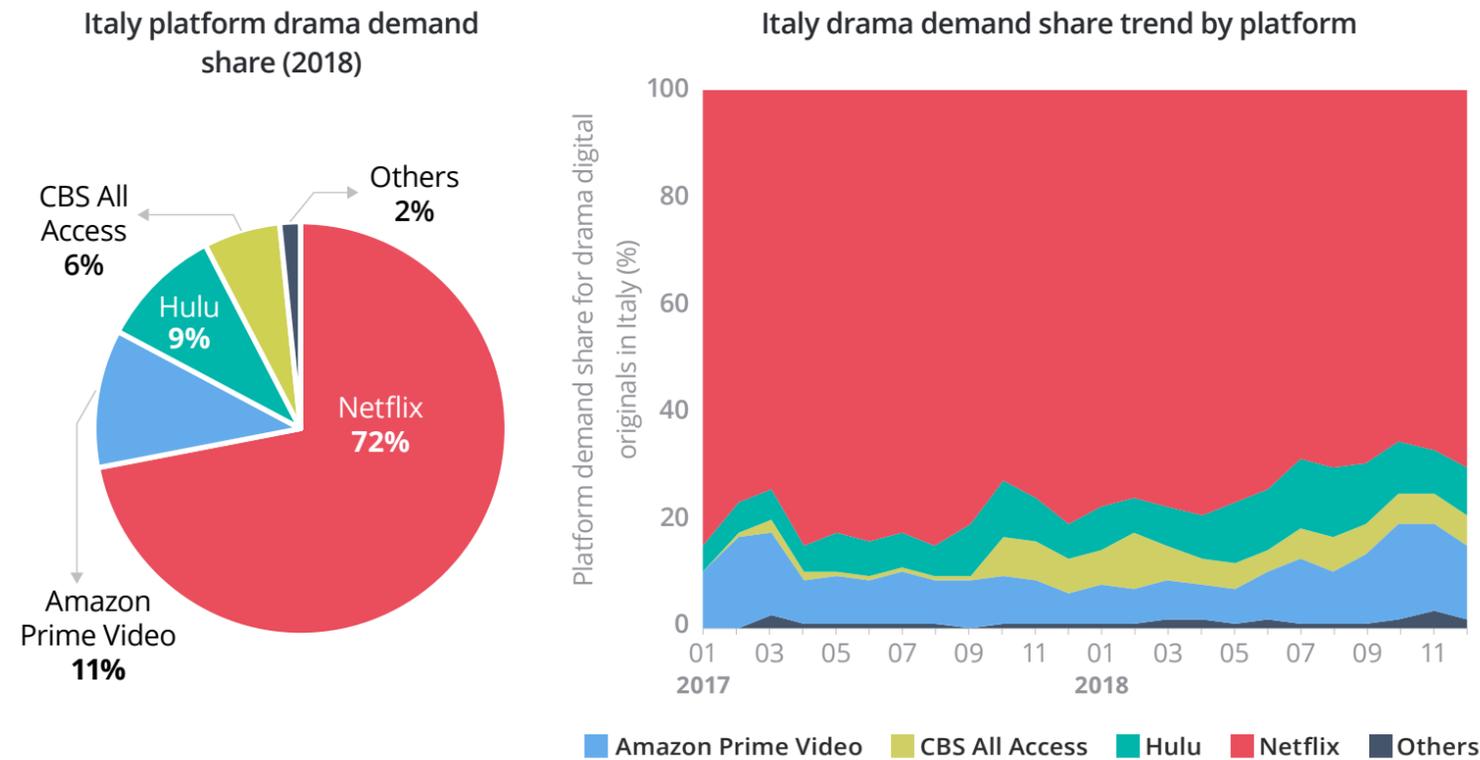
- ▶ Across all genres of digital original titles in Italy in 2018, Netflix titles account for 73% of expressed demand.
- ▶ The second highest demand share is for Prime Originals (11%), followed by Hulu titles (8%) and CBS All Access titles (4%).
- ▶ The 24 month demand share trend chart shows that whilst Netflix's platform share is decreasing, this change is happening slower than in most other markets profiled in this report.

- ▶ The digital original title with the highest 2018 average demand in Italy is Netflix's *Stranger Things*; it had over 14.9 times the demand of the average title in Italy.
- ▶ Crime drama *Narcos* was a very close second with 14.88 times the average demand; both titles fall into the "Outstanding" performance category in Italy.
- ▶ TIMvision's Italian adaptation of the teen drama *Skam* is one of the most in-demand digital originals of 2018 with close to four and a half times the demand of the average title in this market.

Italy platform demand share for drama and action/adventure digital originals

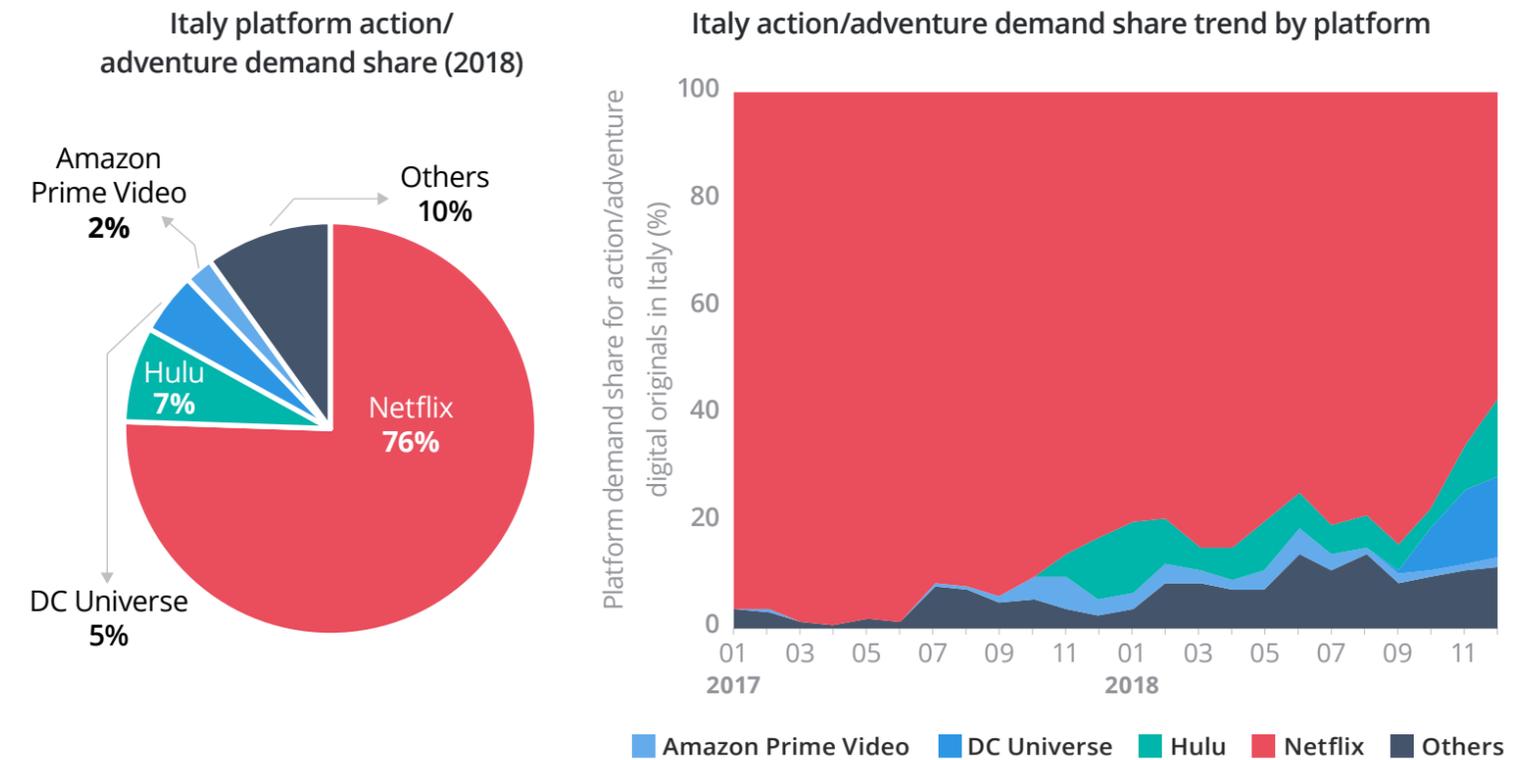
January, 2017 – December, 2018

Italy market demand share by original platform for drama digital originals



- ▶ With 72% of the platform demand share for drama digital original titles in Italy, Netflix has the most demand out of all SVOD services for this genre.
- ▶ Prime Video drama titles have an 11% demand share in this market whilst Hulu titles account for 9%.
- ▶ In Italy, Netflix's share of demand for drama digital originals has been slowly decreasing as evidenced by the 24 month trend chart.

Italy market demand share by original platform for action/adventure digital originals



- ▶ Over three quarters of all action/adventure demand in Italy in 2018 was for a Netflix original title.
- ▶ Hulu titles have the second largest demand share with 7% of the market whilst DC Universe has the third largest share with 5%.
- ▶ Netflix's share of action/adventure demand is decreasing rapidly according to the 24-month demand series chart.

Top digital original series in Italy

January – December, 2018

The top 20 most in-demand digital original series:

Series Name	In-Market Platform*	Original Platform	Genre	Average daily Demand Expressions (DEx) in 2018
1 <i>Stranger Things</i>	Netflix	Netflix	Sci-Fi	3,020,239
2 <i>Narcos</i>	Netflix	Netflix	Drama	3,017,352
3 <i>Black Mirror</i>	Netflix	Netflix	Sci-Fi	2,915,363
4 <i>13 Reasons Why</i>	Netflix	Netflix	Drama	2,592,334
5 <i>Orange Is The New Black</i>	Netflix	Netflix	Comedy Drama	2,571,171
6 <i>La Casa De Papel (Money Heist)</i>	Netflix	Antena 3/Netflix	Drama	2,459,732
7 <i>Chilling Adventures Of Sabrina</i>	Netflix	Netflix	Horror	2,353,939
8 <i>Baby</i>	Netflix	Netflix	Drama	2,301,630
9 <i>The Handmaid's Tale</i>	TIMvision	Hulu	Drama	2,022,360
10 <i>Sense8</i>	Netflix	Netflix	Sci-Fi	1,933,198
11 <i>The Haunting Of Hill House</i>	Netflix	Netflix	Horror	1,914,902
12 <i>Marvel's Daredevil</i>	Netflix	Netflix	Action/Adventure	1,665,663
13 <i>Star Trek: Discovery</i>	Netflix	CBS All Access	Sci-Fi	1,613,029
14 <i>Titans</i>	Netflix	DC Universe	Action/Adventure	1,593,883
15 <i>BoJack Horseman</i>	Netflix	Netflix	Comedy	1,547,667
16 <i>Marvel's Jessica Jones</i>	Netflix	Netflix	Action/Adventure	1,486,218
17 <i>Suburra</i>	Netflix	Netflix	Drama	1,479,645
18 <i>The Man In The High Castle</i>	Amazon Prime Video	Amazon Prime Video	Sci-Fi	1,401,264
19 <i>House Of Cards</i>	Netflix	Netflix	Drama	1,317,097
20 <i>Hakan: Muhafiz (The Protector)</i>	Netflix	Netflix	Action/Adventure	1,307,453

A selection of 5 additional digital original series of interest:

23 <i>The Grand Tour</i>	Amazon Prime Video	Amazon Prime Video	Reality	1,076,150
26 <i>The First</i>	TIMvision	Hulu	Sci-Fi	910,766
27 <i>SKAM Italia</i>	TIMvision	TIMvision	Drama	901,378
41 <i>You</i>	Netflix	Netflix	Drama	624,814
43 <i>Marco Polo</i>	Netflix	Netflix	Drama	612,015

* Distributor for most recent season in case of multiple platforms

Travelability, subgenre, platform demand share and digital original trends

Mexico

Learn where in the world content produced in this market is most wanted and which subgenres resonate the most with Mexicans. Discover the demand share of the leading SVOD platforms over the last 2 years and explore demand for the top 20 streaming originals.

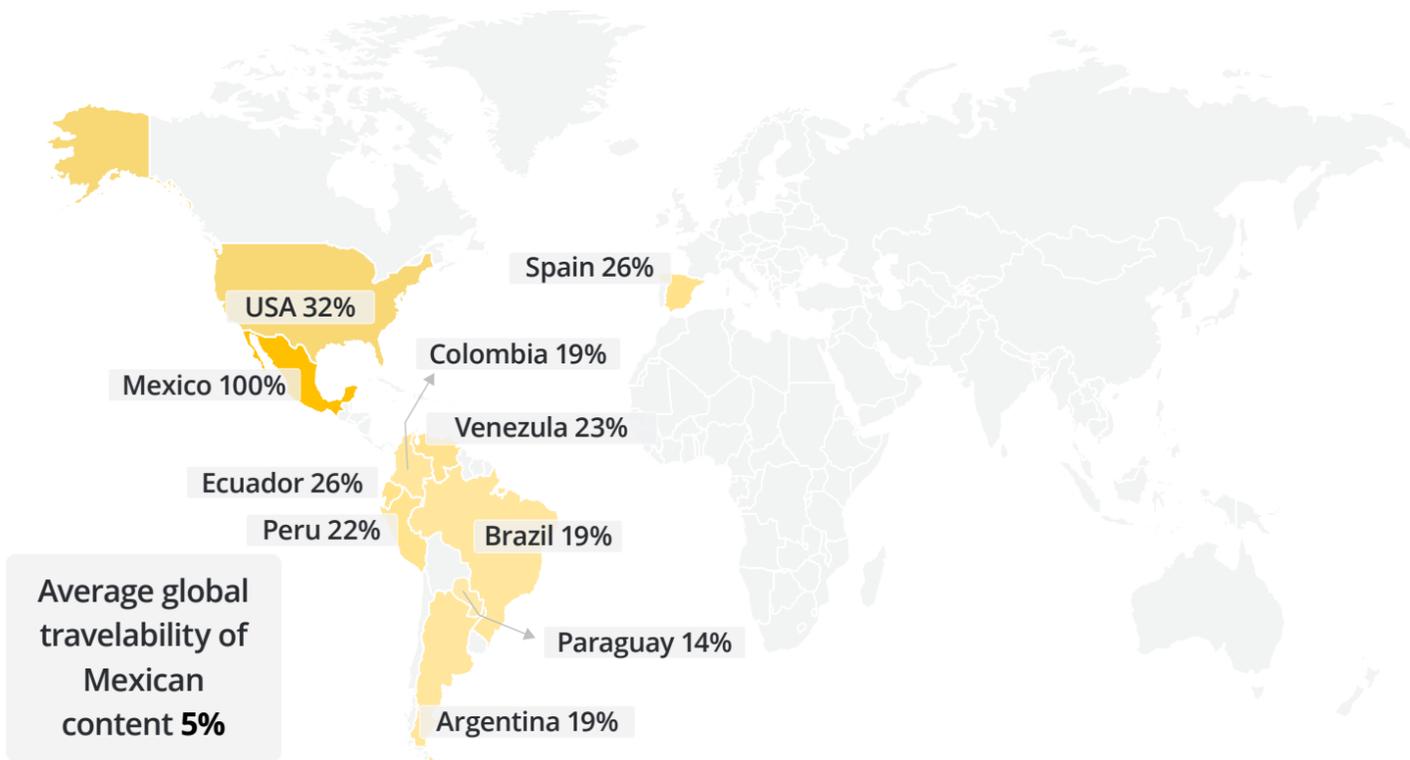
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Travelability of Mexican local productions and local subgenre preferences

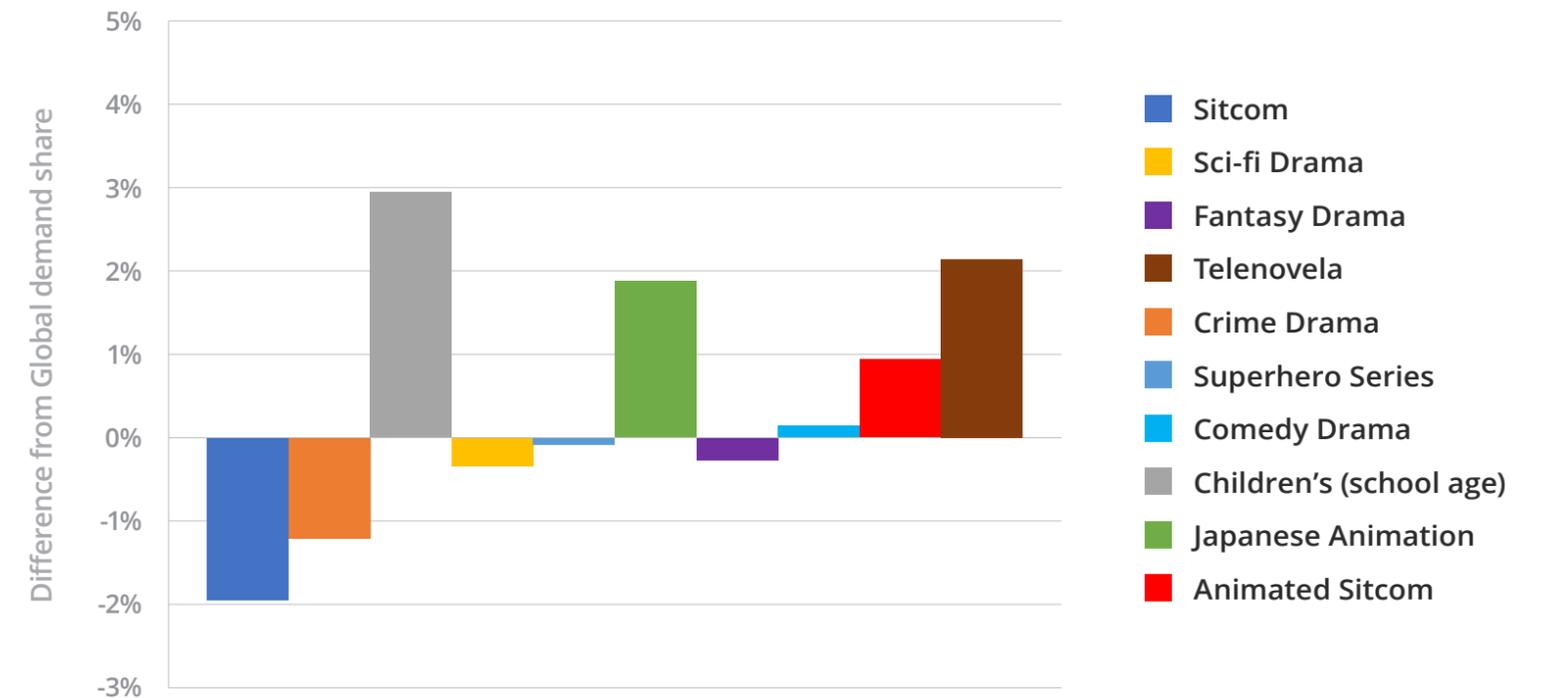
January – December, 2018

The global travelability of content produced in Mexico



- ▶ The international market where Mexican content performs best is the USA: Demand for the average Mexican title in the USA is 32% of Mexican demand.
- ▶ Mexican content also travels well to Spain and Latin American countries such as Ecuador, Venezuela and Peru.
- ▶ Globally, Mexican content has 4.8% travelability; this is approximately in the middle of the 10 countries in this report, with Canada being highest (29.9%) and Brazil being lowest (2.4%).

Most in-demand Mexican subgenres compared to global trends

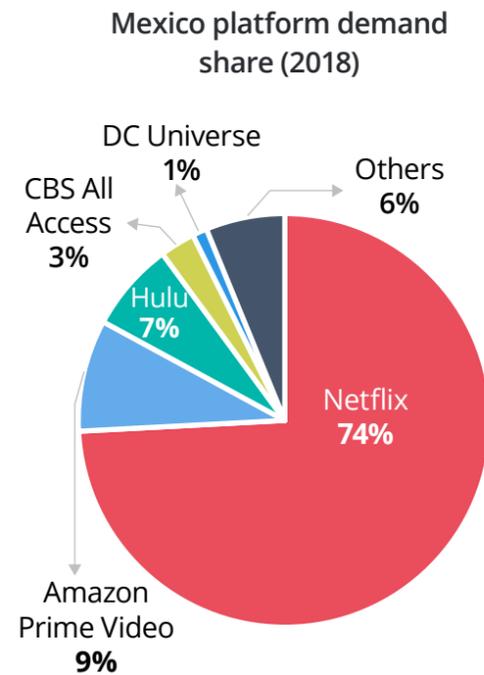


- ▶ The largest demand share in Mexico is for crime drama, which accounts for 7.5% of all expressed demand in this market, 1.3% less than the global average.
- ▶ Like in other markets, the two largest subgenres in Mexico are crime dramas and sitcoms, however, both of these have a lower demand share in Mexico than the global average.
- ▶ School age children's shows and telenovelas have a higher demand share in Mexico than they do worldwide; the demand share for these subgenres in this market is 2.9% and 2.1% more than the worldwide average, respectively.

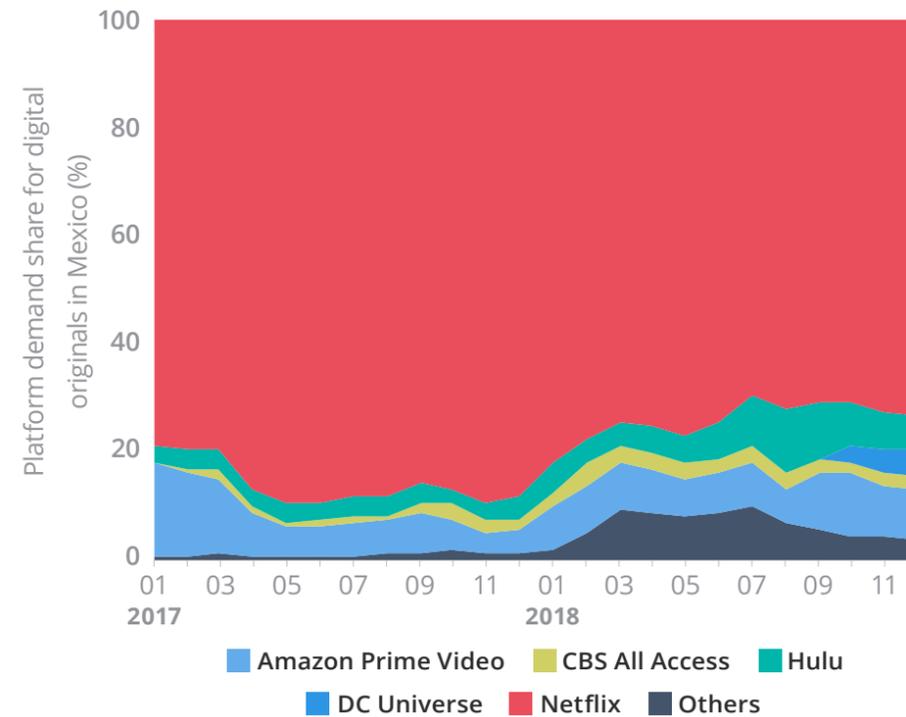
Mexico platform demand share and digital originals demand distribution

January, 2017 – December, 2018

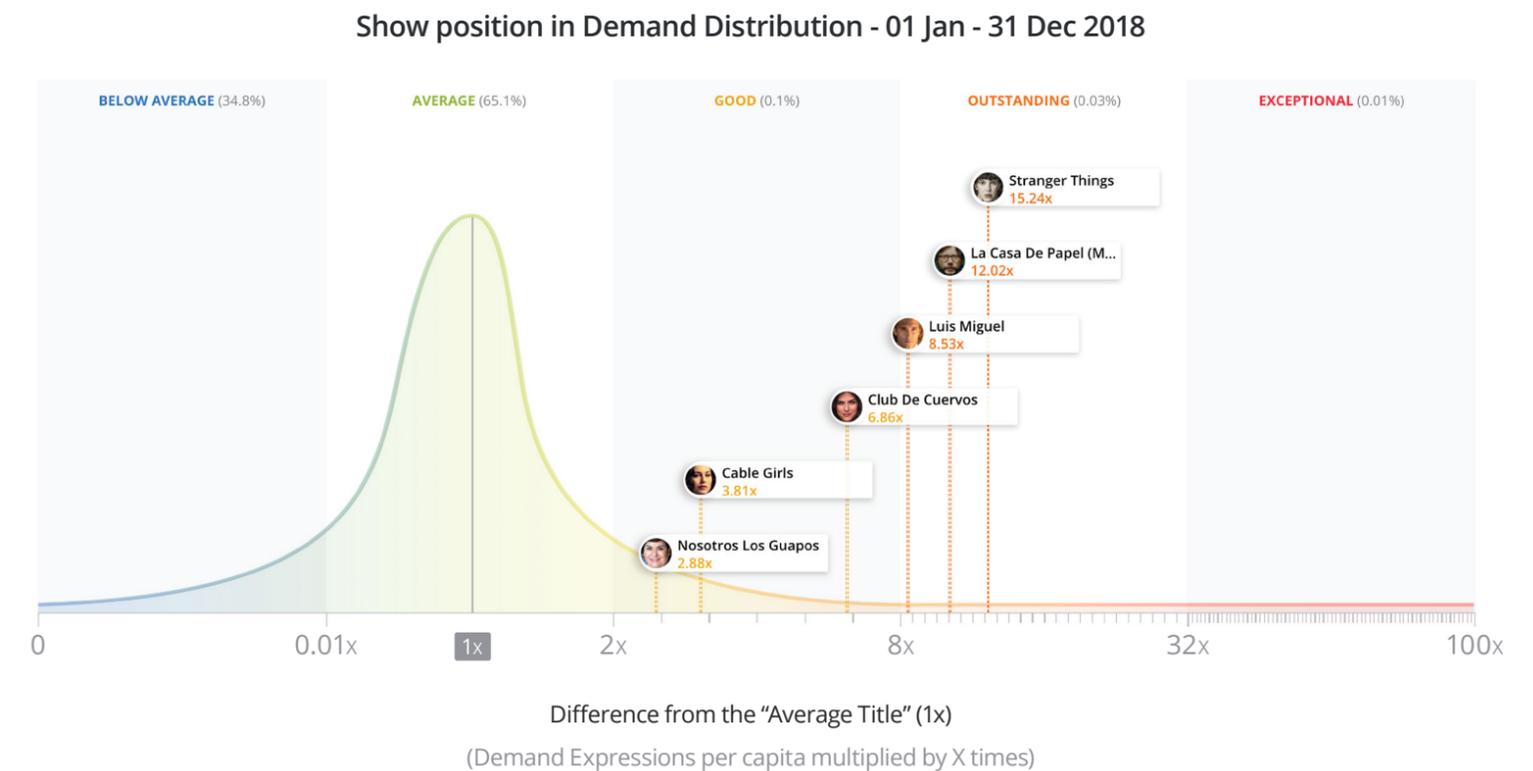
Mexico market demand share by original platform for all digital originals



Mexico platform demand share trend



Demand distribution of a selection of top digital originals in Mexico



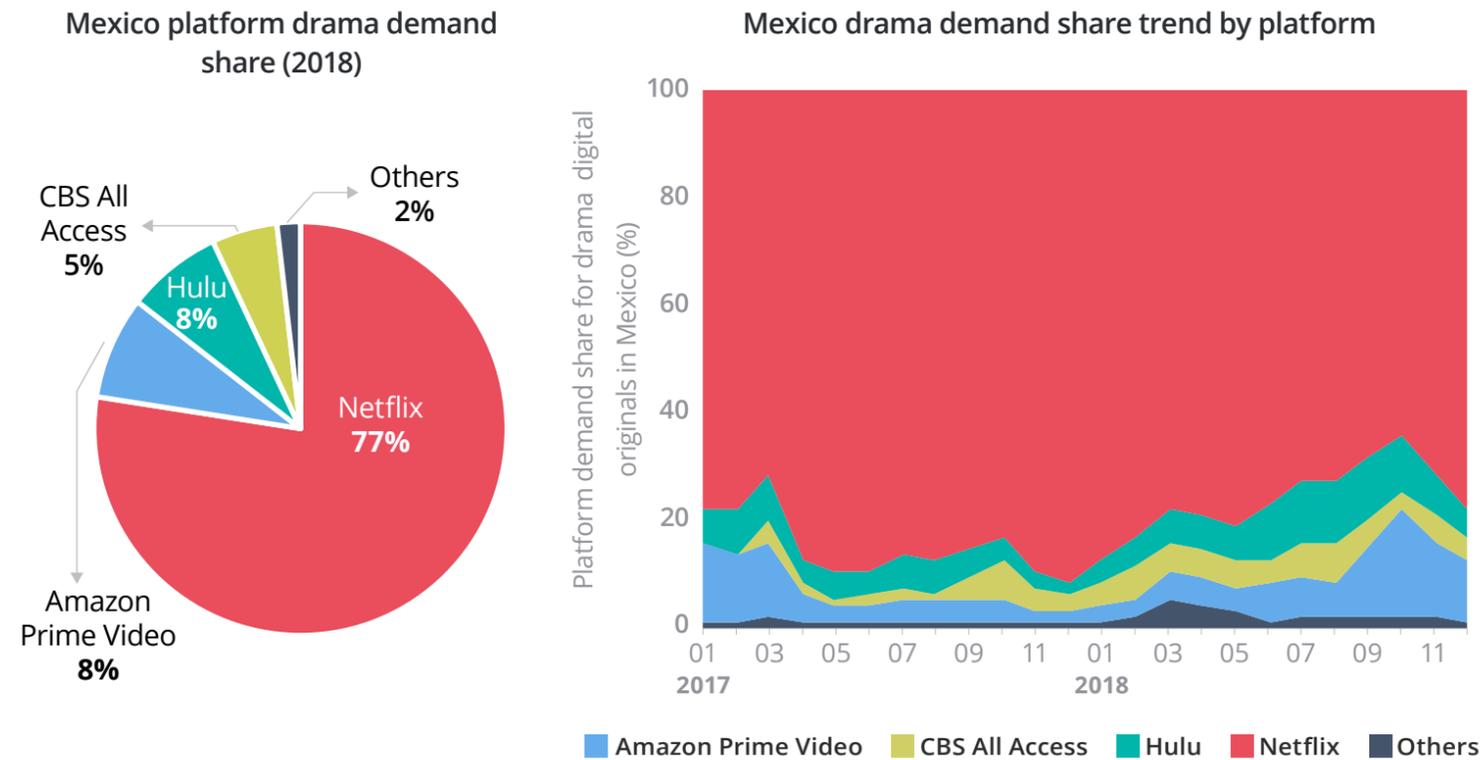
- ▶ Mexico is one of the strongest markets for Netflix in this report: 74% of all demand expressed for digital originals is for a Netflix title in 2018. In fact, the 24 month platform demand share trend sees the company moderately strengthen its position in the second half of 2018.
- ▶ The second highest demand share in 2018 is for Prime Originals (9%), followed by Hulu Originals (7%).
- ▶ The impact in Mexico of highly in-demand DC Universe content can be clearly seen towards the end of 2018.

- ▶ Sci-fi hit *Stranger Things* was Mexico's most in-demand digital original of 2018.
- ▶ Mexico benefits from both international and local SVOD service investment in Mexican content. Local titles from both Netflix (e.g. *Club De Cuervos*) and Blim (e.g. *Nosotros Los Guapos*) are some of the most in-demand digital original titles in this market.
- ▶ *Luis Miguel* has also resonated well with Mexican audiences with over eight and a half times the demand of an average title in this market.

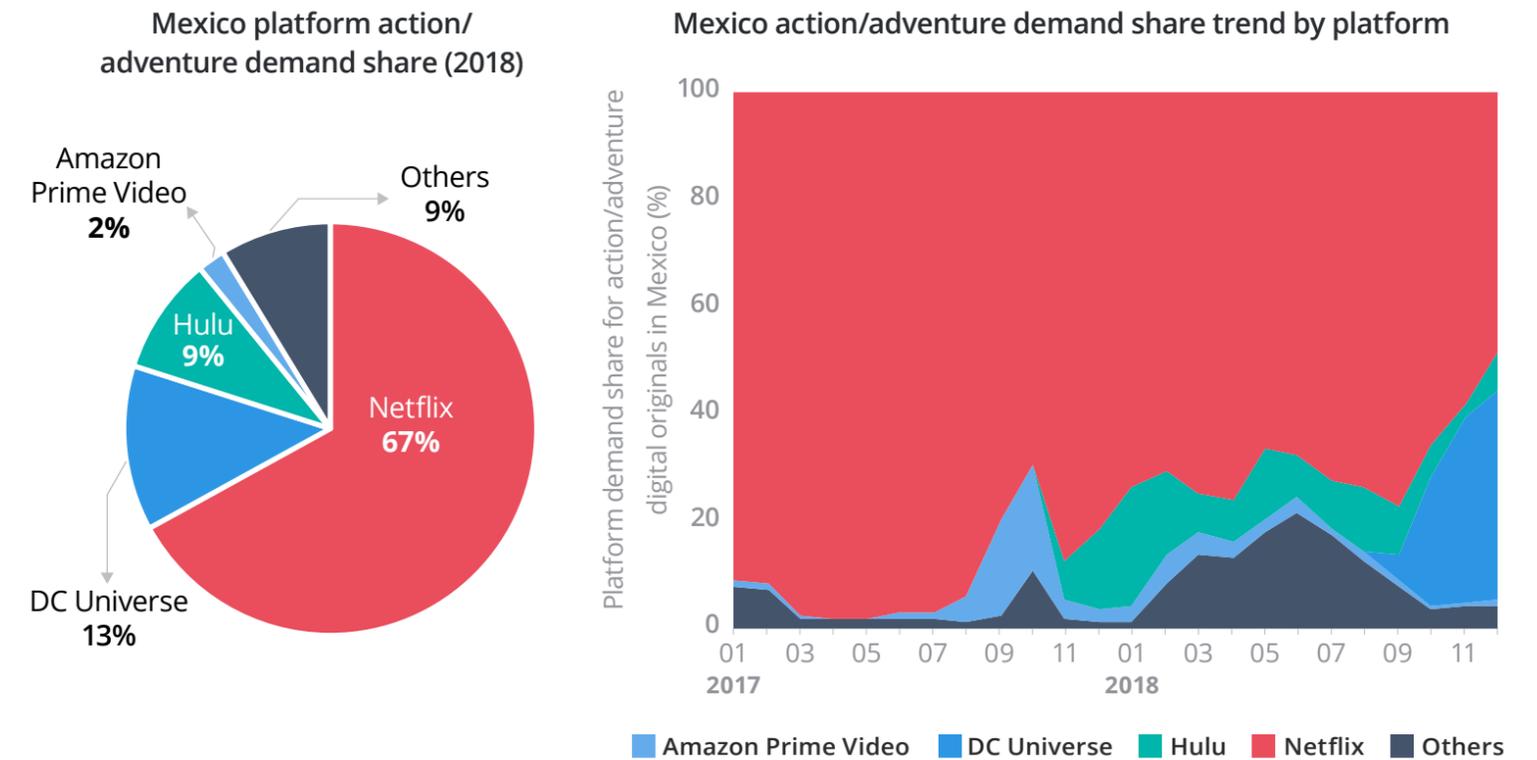
Mexico platform demand share for drama and action/adventure digital originals

January, 2017 – December, 2018

Mexico market demand share by original platform for drama digital originals



Mexico market demand share by original platform for action/adventure digital originals



- ▶ Netflix has a stronger presence in the drama SVOD space in Mexico than in the other nine markets in this report.
- ▶ 77% of all demand for digital original drama titles in Mexico is expressed for a Netflix title, followed by Prime Originals (8%) and Hulu (8%).
- ▶ Our 24 month series chart reveals that Netflix has re-captured lost platform demand share in the last two months of 2018.

- ▶ Netflix has 67% of the demand share for digital originals in the action/adventure genre in Mexico.
- ▶ DC Universe titles perform best in Mexico out of all territories in this report with 13% of platform demand expressed for titles in this genre. The platform's rapid rise is clearly evident in the 24 month timeseries chart.
- ▶ Hulu titles account for 9% of action/adventure digital originals in Mexico.

Top digital original series in Mexico

January – December, 2018

The top 20 most in-demand digital original series:

Series Name	In-Market Platform*	Original Platform	Genre	Average daily Demand Expressions (DEx) in 2018
1 <i>Stranger Things</i>	Netflix	Netflix	Sci-Fi	6,301,817
2 <i>Chilling Adventures Of Sabrina</i>	Netflix	Netflix	Horror	5,011,887
3 <i>La Casa De Papel (Money Heist)</i>	Netflix	Antena 3/Netflix	Drama	4,930,702
4 <i>Titans</i>	Netflix	DC Universe	Action/Adventure	4,068,909
5 <i>13 Reasons Why</i>	Netflix	Netflix	Drama	3,671,005
6 <i>Luis Miguel, La Serie</i>	Netflix	Telemundo/Netflix	Drama	3,498,038
7 <i>Black Mirror</i>	Netflix	Netflix	Sci-Fi	2,838,494
8 <i>Orange Is The New Black</i>	Netflix	Netflix	Comedy Drama	2,833,209
9 <i>Club De Cuervos</i>	Netflix	Netflix	Comedy	2,813,632
10 <i>Cobra Kai</i>	YouTube Premium	YouTube Premium	Comedy	2,798,155
11 <i>The Haunting Of Hill House</i>	Netflix	Netflix	Horror	2,760,418
12 <i>Narcos</i>	Netflix	Netflix	Drama	2,554,644
13 <i>Sense8</i>	Netflix	Netflix	Sci-Fi	2,397,169
14 <i>The Handmaid's Tale</i>	Paramount Channel LA	Hulu	Drama	2,196,423
15 <i>The House of Flowers (La Casa De Las Flores)</i>	Netflix	Netflix	Comedy	2,064,381
16 <i>Marvel's Daredevil</i>	Netflix	Netflix	Action/Adventure	1,863,544
17 <i>BoJack Horseman</i>	Netflix	Netflix	Comedy	1,741,863
18 <i>Dark</i>	Netflix	Netflix	Drama	1,690,867
19 <i>Cable Girls (Las Chicas Del Cable)</i>	Netflix	Netflix	Drama	1,641,718
20 <i>Altered Carbon</i>	Netflix	Netflix	Sci-Fi	1,541,485

A selection of 5 additional digital original series of interest:

25 <i>Made In Mexico</i>	Netflix	Netflix	Reality	1,297,052
29 <i>Nosotros Los Guapos</i>	Blim	Blim	Comedy	1,194,718
33 <i>Ingobernable</i>	Netflix	Netflix	Drama	1,059,792
36 <i>Mozart In The Jungle</i>	Amazon Prime Video	Amazon Prime Video	Comedy	908,714
43 <i>40 Y 20</i>	Blim	Blim	Comedy	729,768

* Distributor for most recent season in case of multiple platforms

Travelability, subgenre, platform demand share and digital original trends

Spain

Learn where in the world content produced in this market is most wanted and which subgenres resonate the most with Spaniards. Discover the demand share of the leading SVOD platforms over the last 2 years and explore demand for the top 20 streaming originals.

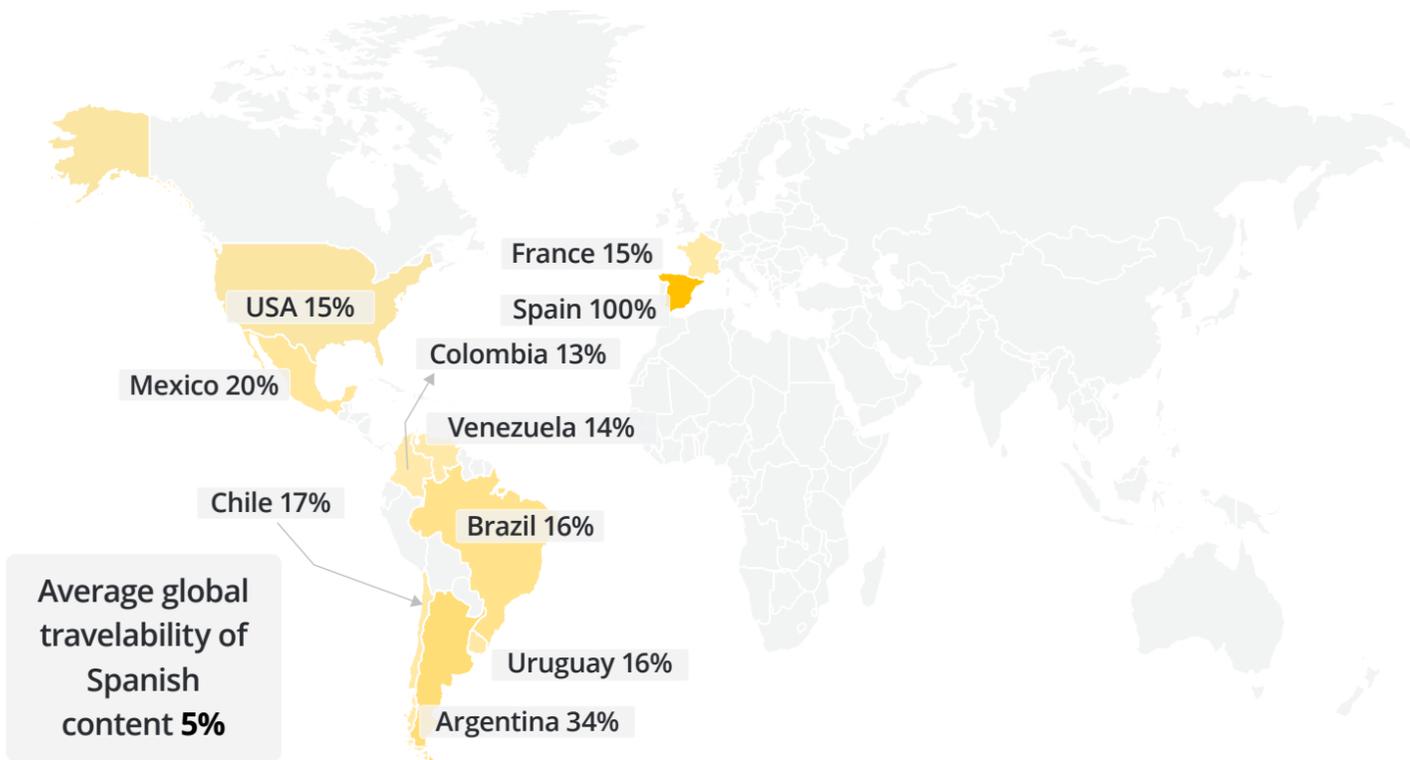
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Travelability of Spanish local productions and local subgenre preferences

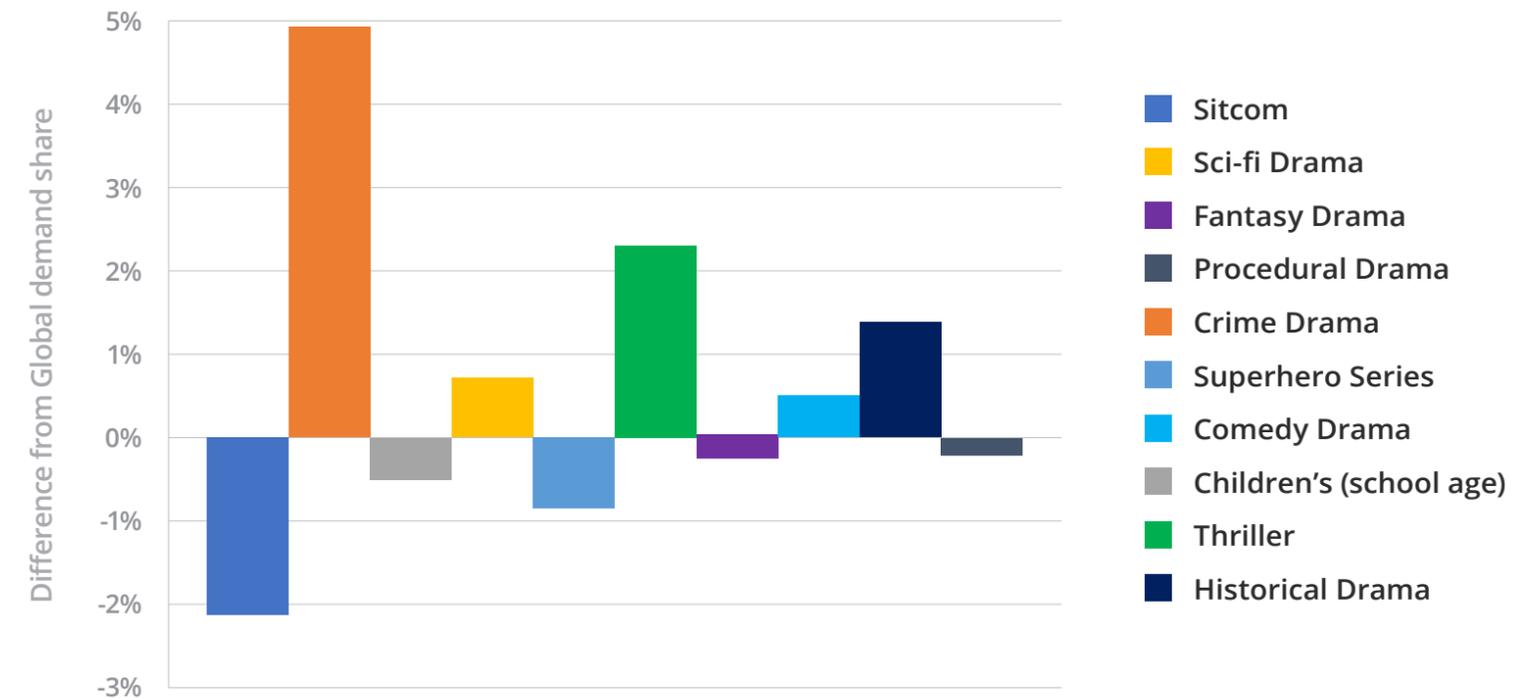
January – December, 2018

The global travelability of content produced in Spain



- ▶ Unlike many other European content producers, the best markets for content produced in Spain are mainly outside of Europe.
- ▶ Spanish content performs well in Latin American markets like Argentina and Mexico.
- ▶ The global travelability of content from Spain is 5.4%. Once again, this is approximately in the middle of the 10 countries in this report, with Canada being highest (29.9%) and Brazil being lowest (2.4%).

Most in-demand Spanish subgenres compared to global trends

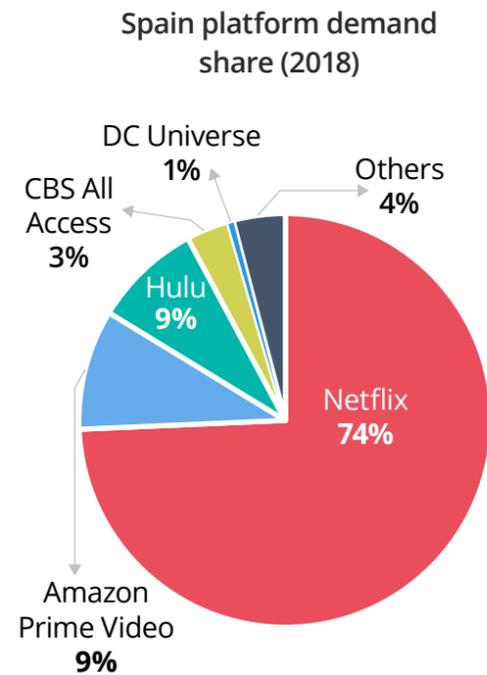


- ▶ The largest demand share in Spain is for crime drama, which accounts for 13.7% of all expressed demand in this market, 5.0% more than the global average.
- ▶ This is in fact the biggest difference from the global average out of all subgenres across all 10 markets in this report.
- ▶ Thrillers are also more in-demand in Spain than they are globally: This subgenre is the fourth largest subgenre in Spain, registering 2.4% more demand share in this market than worldwide.

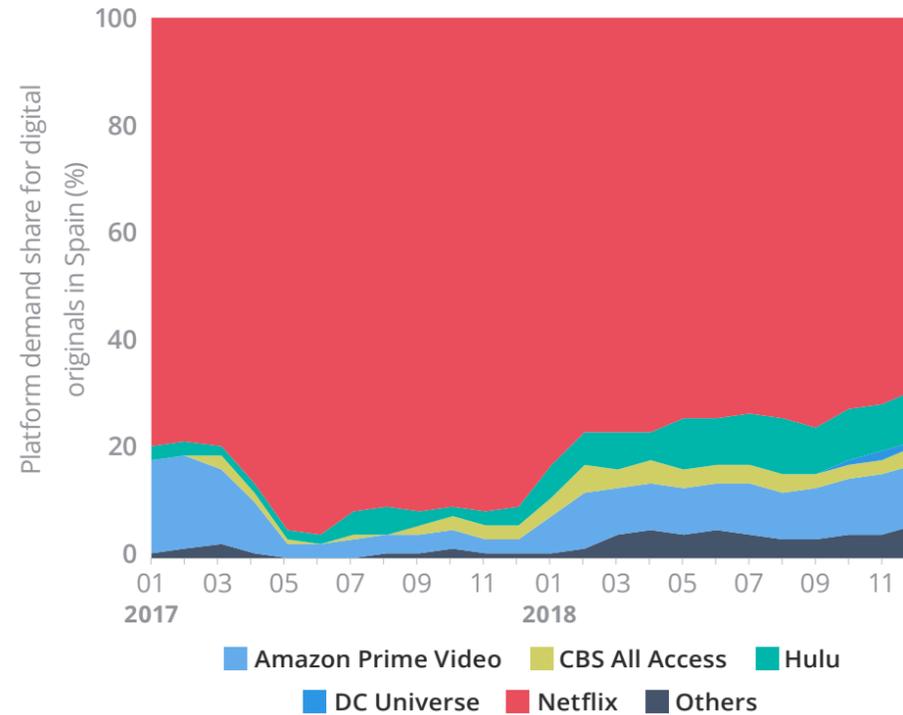
Spain platform demand share and digital originals demand distribution

January, 2017 – December, 2018

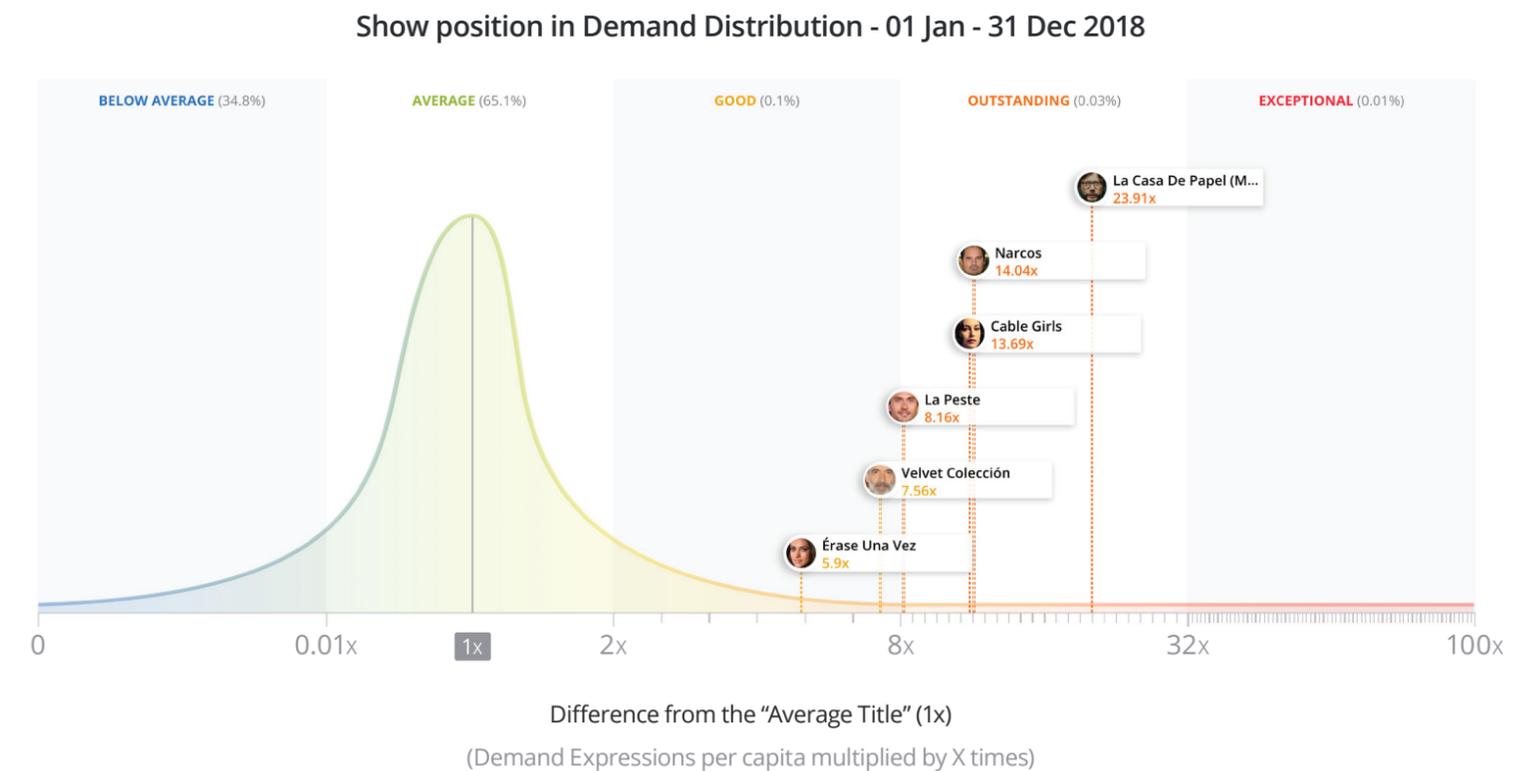
Spain market demand share by original platform for all digital originals



Spain platform demand share trend



Demand distribution of a selection of top digital originals in Spain



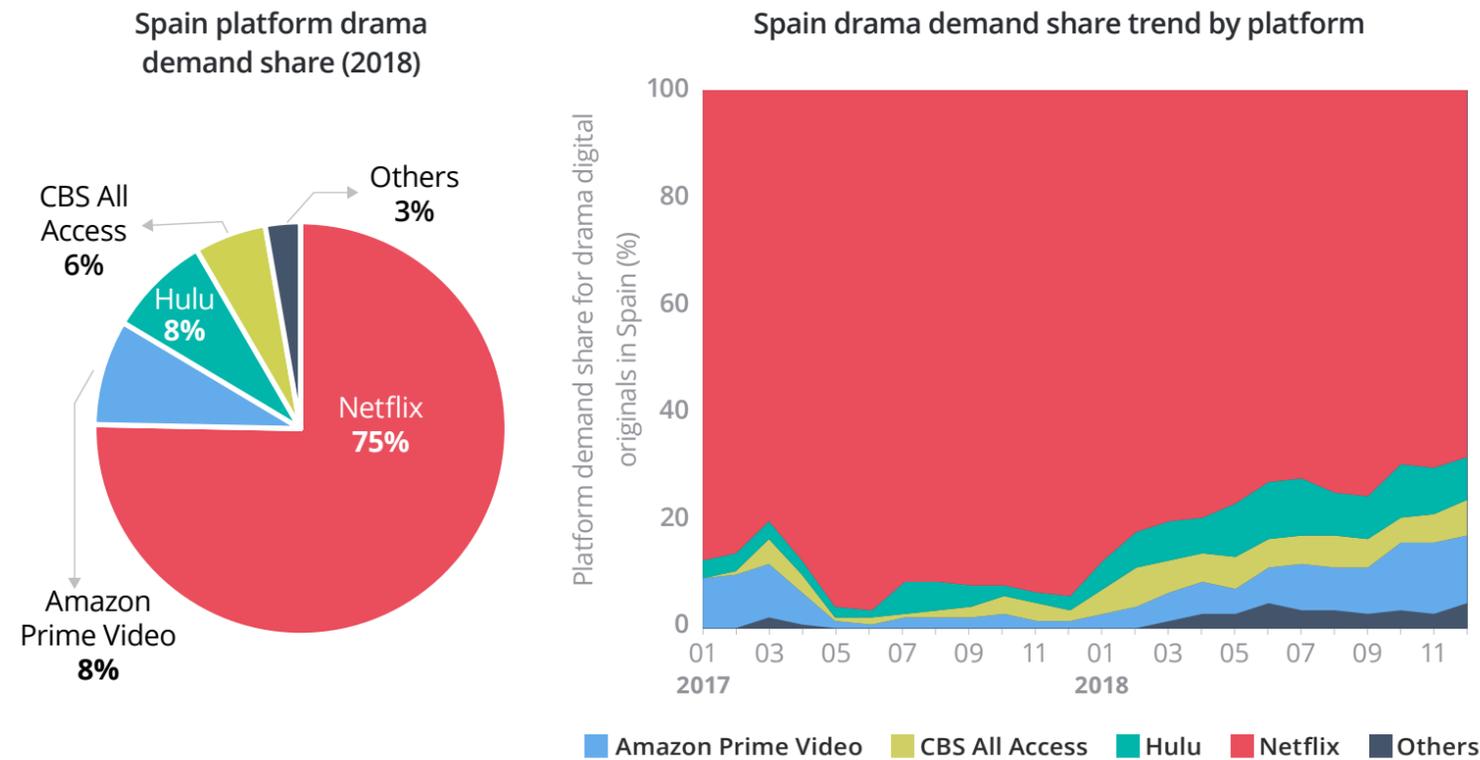
- ▶ Across all genres of digital original titles in Spain over 2018, Netflix titles account for nearly three quarters (74%) of expressed demand.
- ▶ Prime Video and Hulu titles have the second and third largest platform demand share of the Spanish market, with 9% each.
- ▶ Although Netflix titles continue to capture the most market demand, the Spanish Netflix share is down considerably since the peak in June 2017 when Netflix held a 96% share.

- ▶ *La Casa De Papel*, *Narcos*, *Cable Girls* and *La Peste* have all reached the “Outstanding” category in 2018; this means these titles had over eight times more demand than the average title (*La Peste*) and as much as 23 times (*La Casa De Papel*).
- ▶ Spain is a receptive market to local SVOD-produced content: Five of Spain’s twenty most in-demand digital originals are of Spanish-origin.

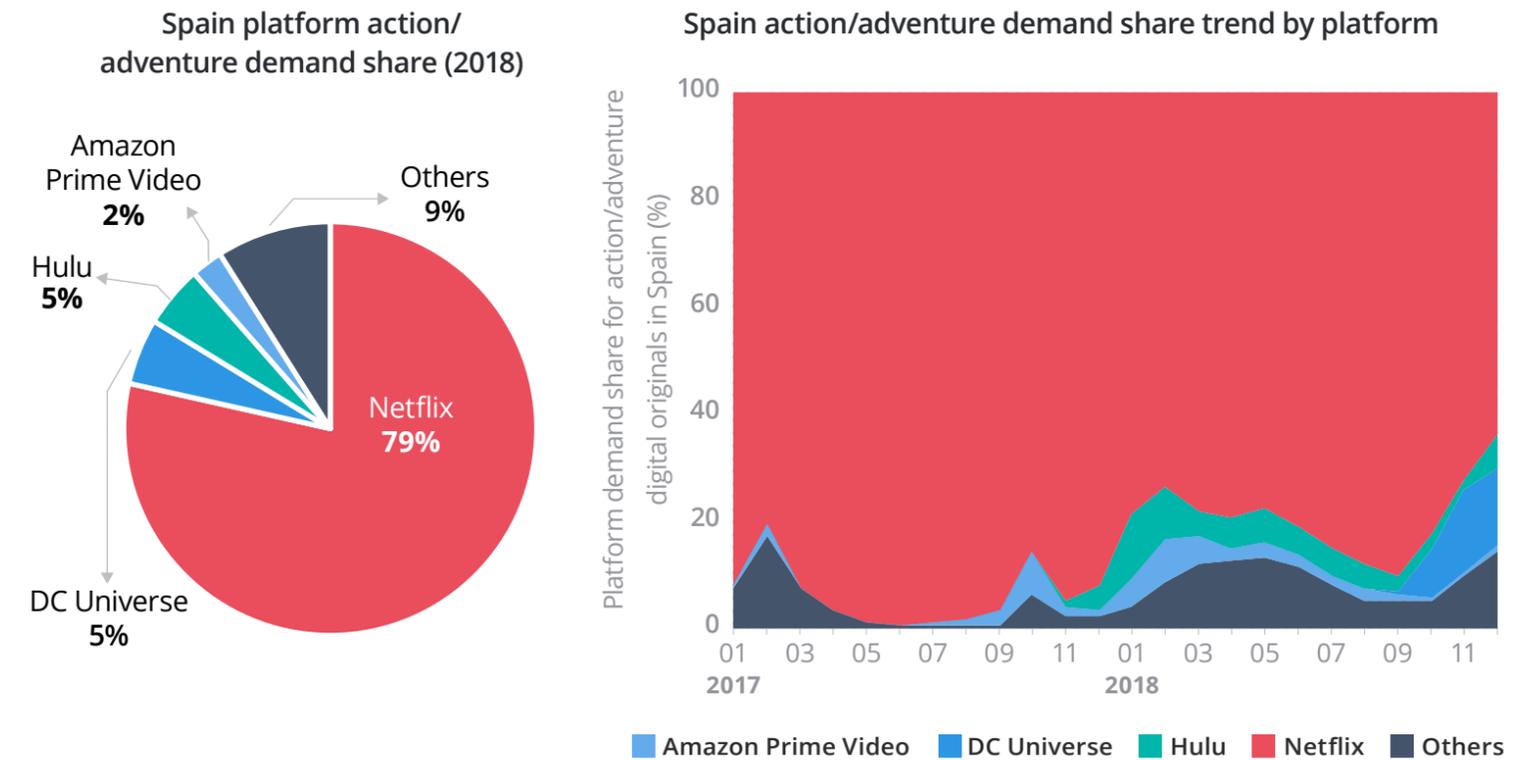
Spain platform demand share for drama and action/adventure digital originals

January, 2017 – December, 2018

Spain market demand share by original platform for drama digital originals



Spain market demand share by original platform for action/adventure digital originals



- ▶ Three quarters of all demand for digital original dramas in Spain is expressed for Netflix titles.
- ▶ Both titles from Hulu and Prime Video account for 8% of SVOD original drama demand, while CBS All Access titles account for 6%
- ▶ Netflix's once near 100% demand share in Spain has been impacted by growth in demand for Prime Video, Hulu and CBS All Access drama titles during 2018.

- ▶ Spanish action/adventure audiences prefer Netflix titles more than the other markets in this report, with 79% of all genre demand expressed for a Netflix Original in 2018.
- ▶ The strong Netflix position means DC Universe and Hulu only have 5% of the market each.
- ▶ The 24 month chart shows that competitors have been making up ground towards the end of 2018.

Top digital original series in Spain

January – December, 2018

The top 20 most in-demand digital original series:

Series Name	In-Market Platform*	Original Platform	Genre	Average daily Demand Expressions (DEx) in 2018
1 <i>La Casa De Papel (Money Heist)</i>	Netflix	Antena 3/Netflix	Drama	3,728,556
2 <i>Stranger Things</i>	Netflix	Netflix	Sci-Fi	3,519,682
3 <i>Narcos</i>	Netflix	Netflix	Drama	2,213,823
4 <i>Cable Girls (Las Chicas Del Cable)</i>	Netflix	Netflix	Drama	2,203,550
5 <i>Black Mirror</i>	Netflix	Netflix	Sci-Fi	1,993,109
6 <i>Sense8</i>	Netflix	Netflix	Sci-Fi	1,632,319
7 <i>Orange Is The New Black</i>	Netflix	Netflix	Comedy Drama	1,581,299
8 <i>The Haunting Of Hill House</i>	Netflix	Netflix	Horror	1,559,904
9 <i>13 Reasons Why</i>	Netflix	Netflix	Drama	1,521,766
10 <i>The Handmaid's Tale</i>	HBO Spain	Hulu	Drama	1,509,413
11 <i>La Peste</i>	Movistar+	Movistar+	Drama	1,284,095
12 <i>Virtual Hero</i>	Movistar+	Movistar+	Animation	1,207,628
13 <i>Velvet Colección (Velvet Collection)</i>	Movistar+	Movistar+	Comedy	1,201,903
14 <i>The Last Kingdom</i>	Netflix	Netflix	Drama	1,181,698
15 <i>Marvel's Daredevil</i>	Netflix	Netflix	Action/Adventure	1,146,338
16 <i>Chilling Adventures Of Sabrina</i>	Netflix	Netflix	Horror	1,107,327
17 <i>Titans</i>	Netflix	DC Universe	Action/Adventure	1,095,351
18 <i>Mindhunter</i>	Netflix	Netflix	Drama	1,064,151
19 <i>The Good Fight</i>	Movistar+	CBS All Access	Drama	1,062,397
20 <i>Marvel's The Defenders</i>	Netflix	Netflix	Action/Adventure	1,055,888

A selection of 5 additional digital original series of interest:

21 <i>Paquita Salas</i>	Netflix	Netflix	Comedy	1,050,665
23 <i>Élite</i>	Netflix	Netflix	Drama	985,444
30 <i>Érase Una Vez</i>	Blim	Blim	Drama	931,806
31 <i>El Día Después</i>	Movistar+	Movistar+	Drama	911,316
32 <i>Mira Lo Que Has Hecho</i>	Movistar+	Movistar+	Comedy	907,235

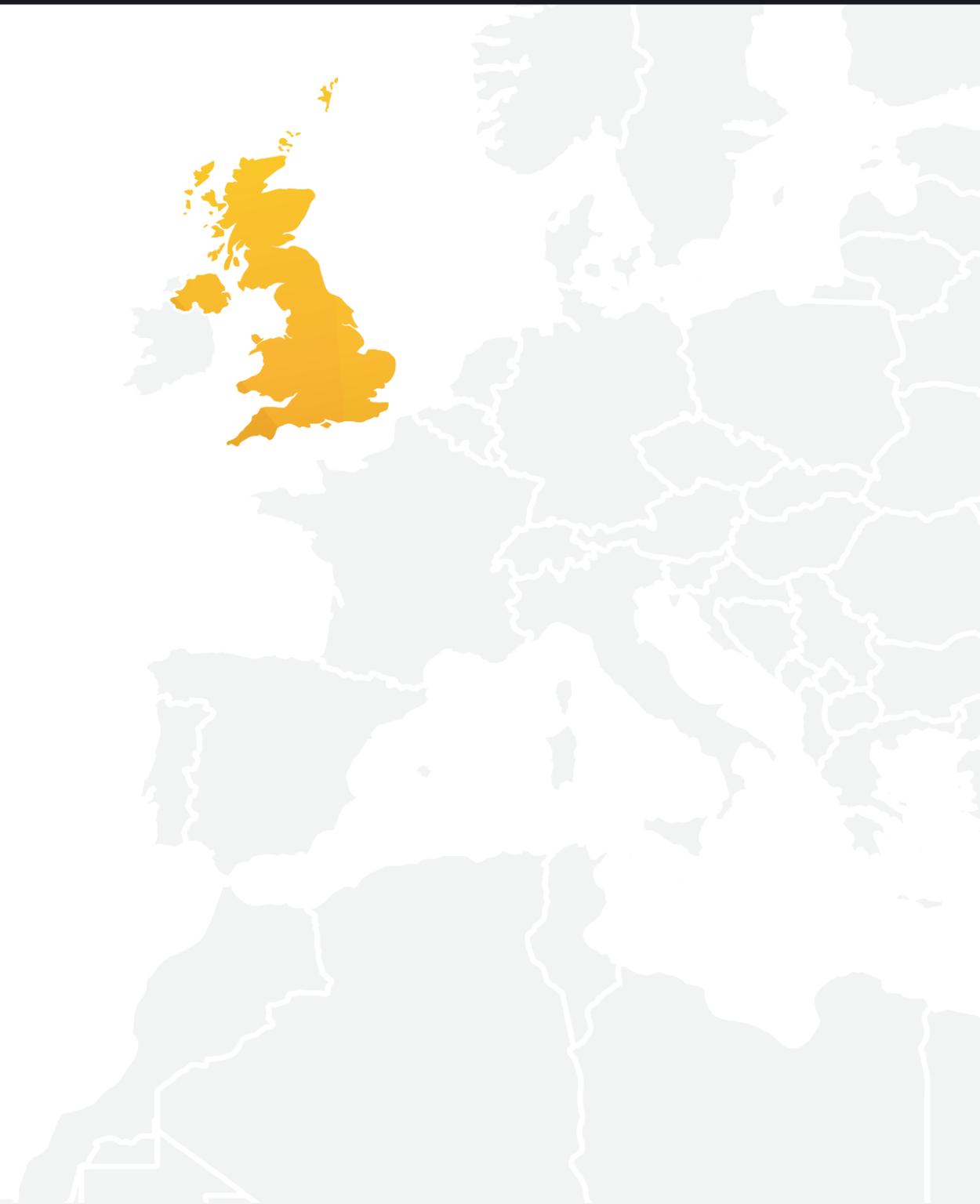
* Distributor for most recent season in case of multiple platforms

Travelability, subgenre, platform demand share and digital original trends

United Kingdom

Learn where in the world content produced in this market is most wanted and which subgenres resonate the most with the British. Discover the demand share of the leading SVOD platforms over the last 2 years and explore demand for the top 20 streaming originals.

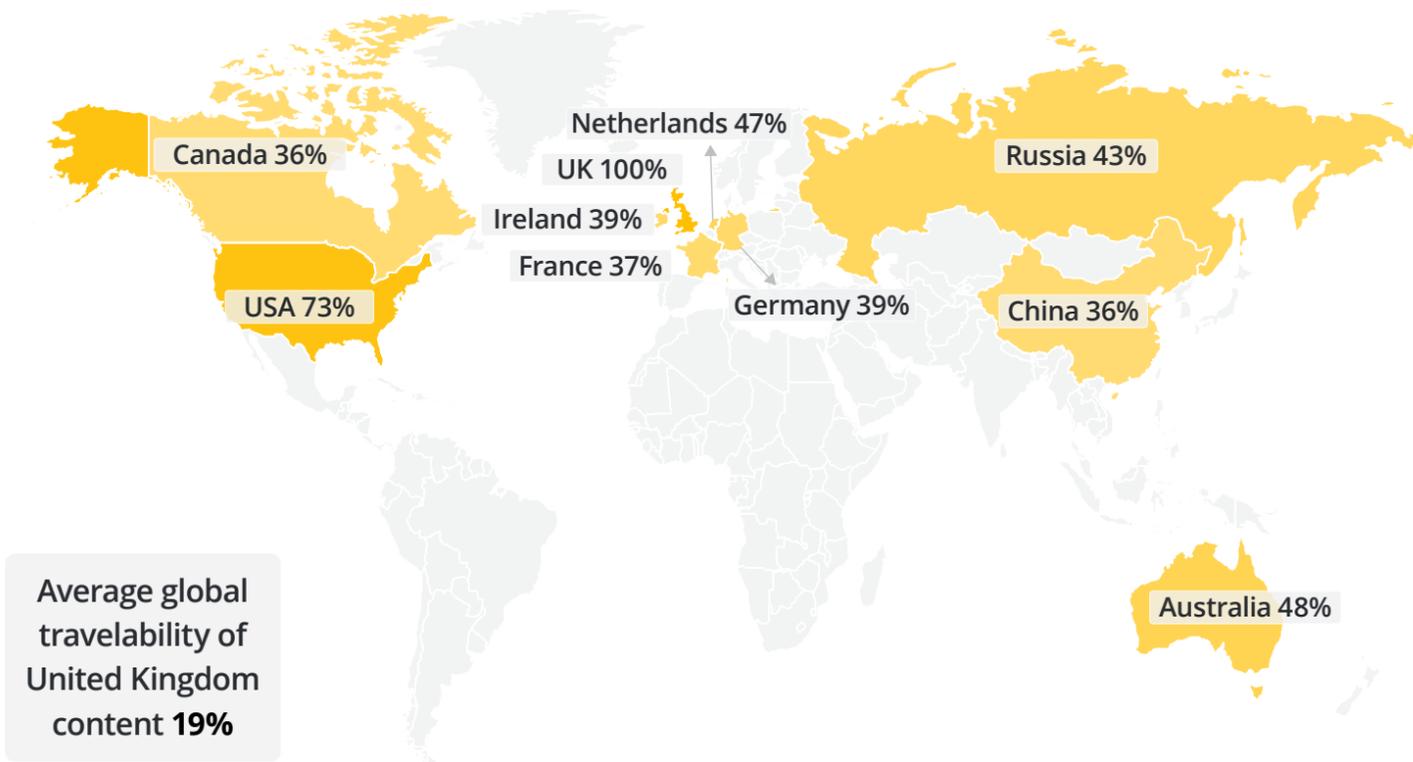
NOTE: The insights presented in this section are based on the entire available Parrot Analytics global TV demand dataset, which is comprised of 3.5 trillion data points across 100+ languages in 100+ countries.



Travelability of United Kingdom local productions and local subgenre preferences

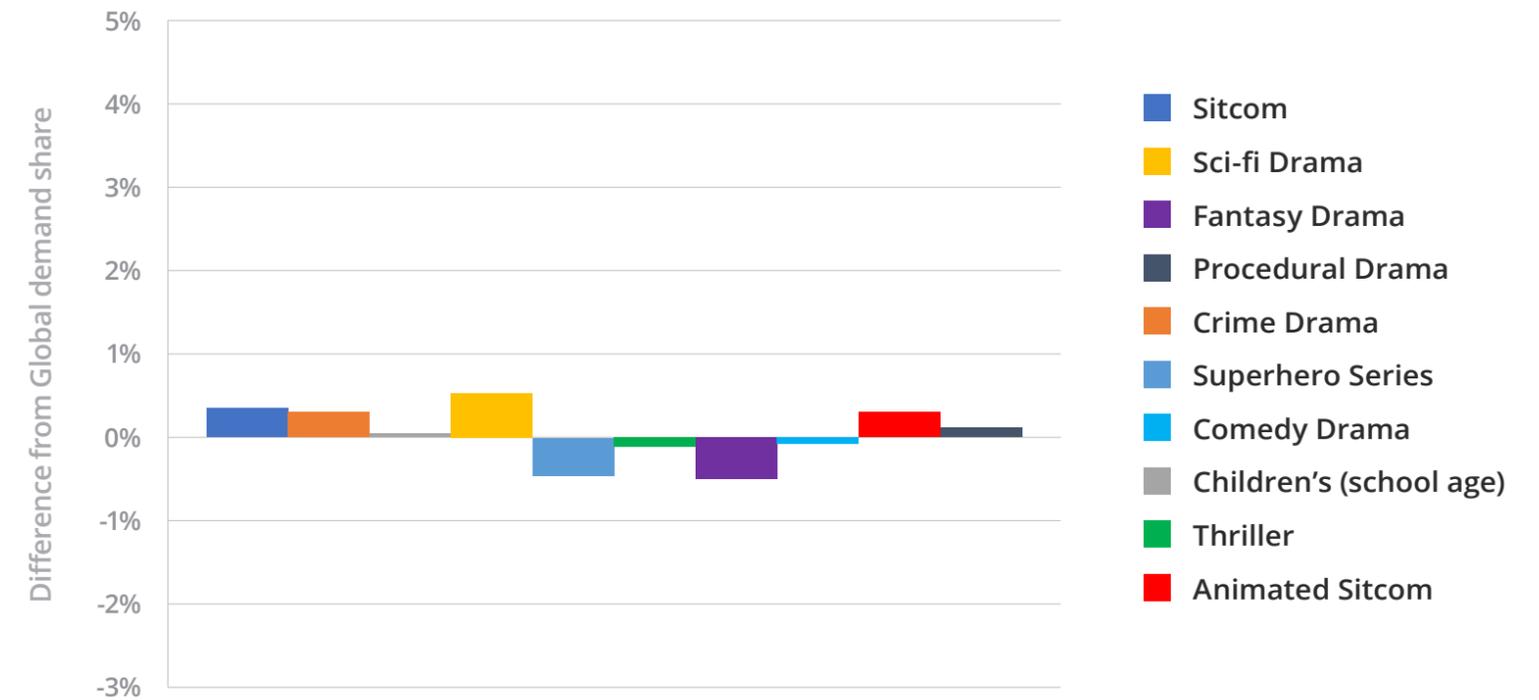
January – December, 2018

The global travelability of content produced in the United Kingdom



- ▶ British content travels well to the United States, registering a travelability of 73%. Only Canadian content is more successful than this out of all 10 markets in this report (113%).
- ▶ Other high-performing markets for UK content include Australia, the Netherlands and Russia.
- ▶ With a high global travelability of 18.6%, UK content travels well to international markets. This level of travelability is higher than most markets, yet Canada (29.9%) still has higher travelability than the UK.

Most in-demand UK subgenres compared to global trends



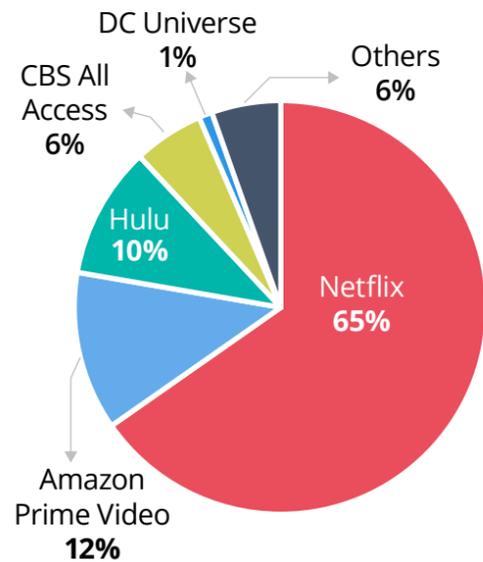
- ▶ The largest demand share is for sitcoms, which accounts for 9.10% of all expressed demand in this market, 0.3% more than the global average.
- ▶ The two next most in-demand subgenres in the UK both also have a larger demand share than the global average, crime drama is over-represented by 0.3% and sci-fi drama by 0.5%.
- ▶ The UK is the closest market in this report to the global averages, with the largest difference being fantasy drama, which has 0.53% less demand share.

United Kingdom platform demand share and digital originals demand distribution

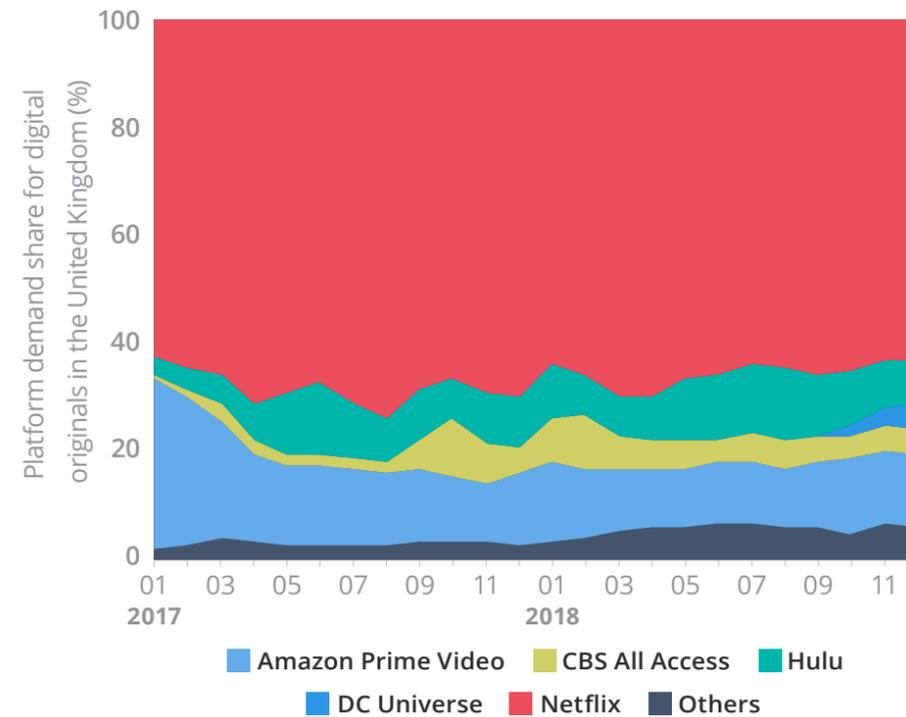
January, 2017 – December, 2018

United Kingdom market demand share by original platform for all digital originals

United Kingdom platform demand share (2018)

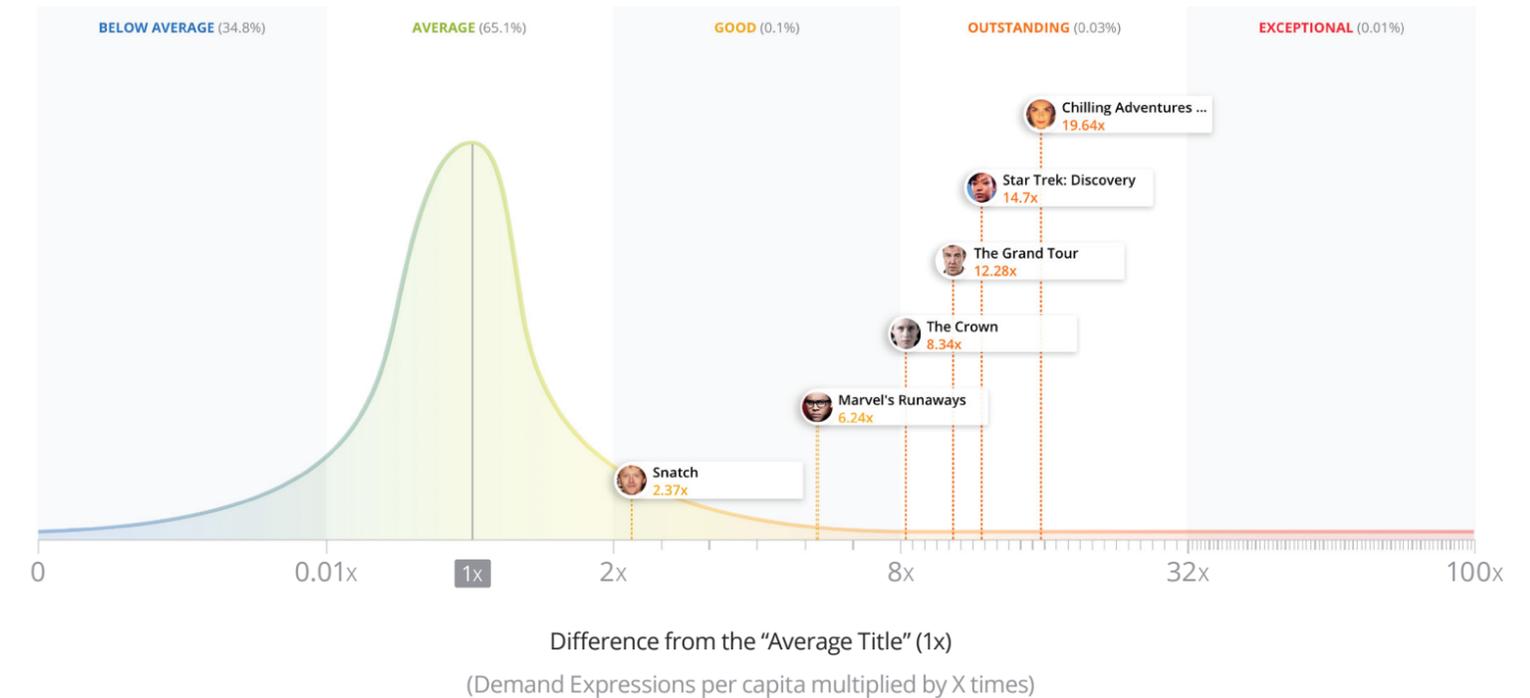


United Kingdom platform demand share trend



Demand distribution of a selection of top digital originals in the United Kingdom

Show position in Demand Distribution - 01 Jan - 31 Dec 2018



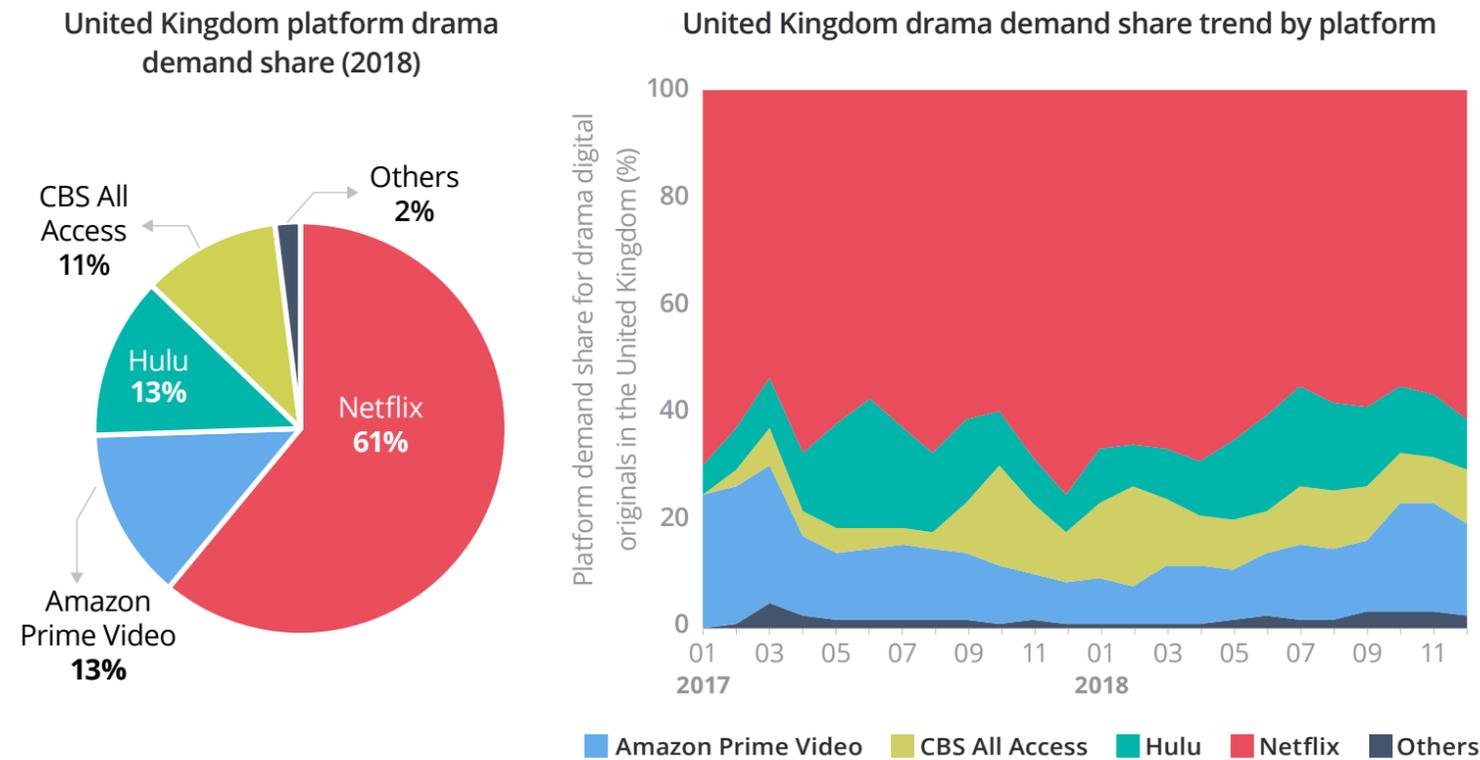
- ▶ Along with Germany, the UK is one of the strongest markets for Prime Video: Prime Originals have a 12% share of all digital original demand in 2018.
- ▶ CBS All Access is also strong in the UK: Along with two other markets in this report, CBS All Access titles have a 6% demand share in 2018.
- ▶ However, Netflix still has a majority 65% demand share in this market, a proportion that has remained mostly stable over 2017 and 2018.

- ▶ The most in-demand digital original title in the UK during 2018 is Netflix's *Chilling Adventures Of Sabrina* with almost 20 times the demand of the average title.
- ▶ Netflix's *The Crown* has strong demand in many markets, naturally the show performs especially well in the United Kingdom.
- ▶ Thanks to its well-known British presenters, Prime Video's *The Grand Tour* also ranks especially highly in this market.

United Kingdom platform demand share for drama and action/adventure digital originals

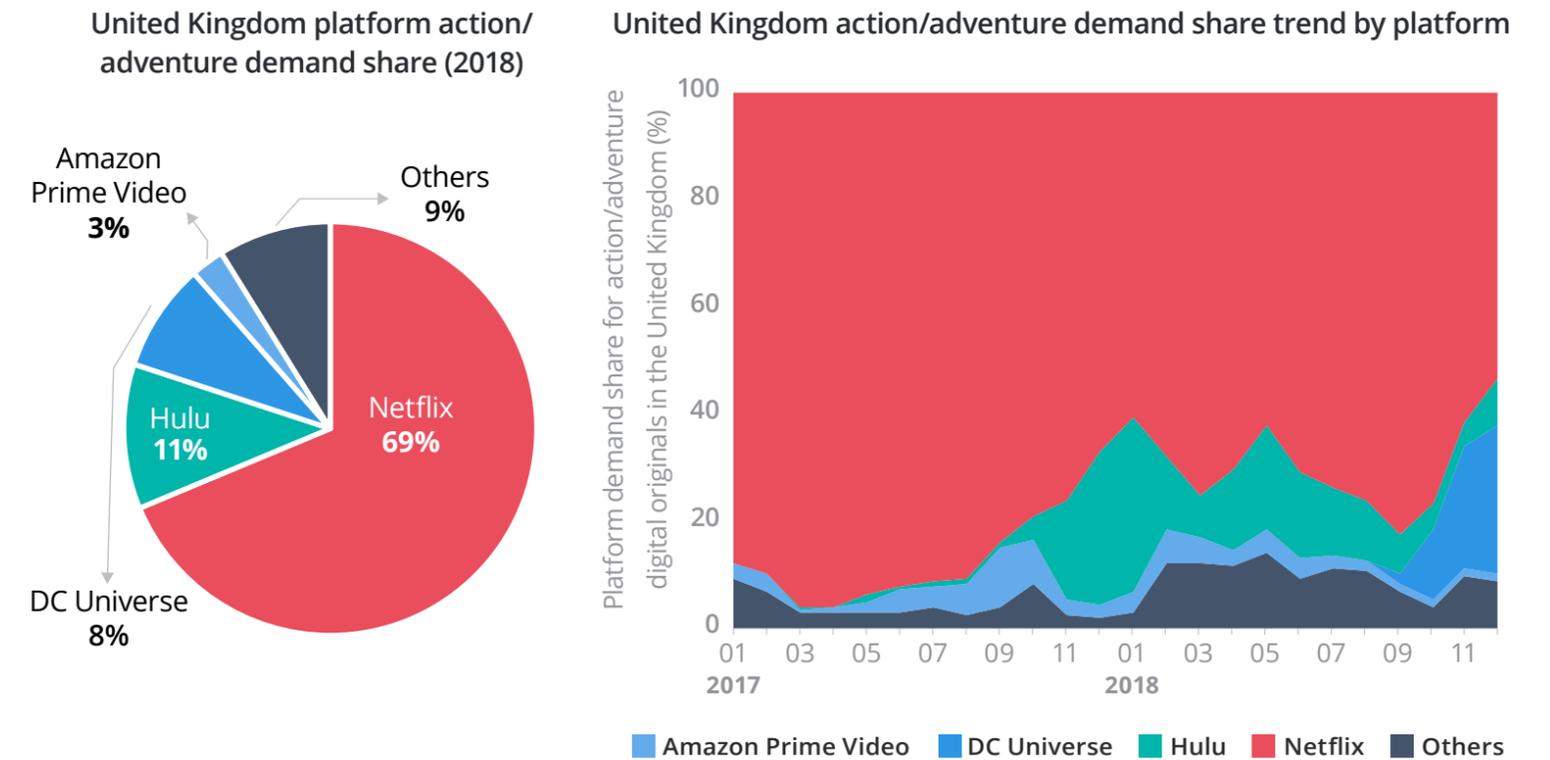
January, 2017 – December, 2018

United Kingdom market demand share by original platform for drama digital originals



- ▶ The UK is one of the most competitive markets for drama SVOD originals.
- ▶ Although Netflix titles still account for 61% of drama digital original demand in the UK, this is lower than every other market in this report and tied with Canada.
- ▶ Prime Video has the second largest drama demand share in this territory, followed by Hulu titles at 13% original platform demand share each.

United Kingdom market demand share by original platform for action/adventure digital originals



- ▶ In the UK, 69% of the demand for action/adventure titles in 2018 was expressed for a Netflix title.
- ▶ Like many of the other markets in this report, the next largest action/adventure demand share in the UK was for Hulu titles (11%) and then DC Universe titles (8%).
- ▶ Competitor digital originals are making inroads in the UK with Netflix's digital original platform share shrinking to 50% of demand.

Top digital original series in the United Kingdom

January – December, 2018

The top 20 most in-demand digital original series:

Series Name	In-Market Platform*	Original Platform	Genre	Average daily Demand Expressions (DEx) in 2018
1 <i>Chilling Adventures Of Sabrina</i>	Netflix	Netflix	Horror	4,154,986
2 <i>Stranger Things</i>	Netflix	Netflix	Sci-Fi	3,669,742
3 <i>Titans</i>	Netflix	DC Universe	Action/Adventure	3,591,021
4 <i>Star Trek: Discovery</i>	Netflix	CBS All Access	Sci-Fi	3,103,923
5 <i>The Haunting Of Hill House</i>	Netflix	Netflix	Horror	2,997,657
6 <i>The Handmaid's Tale</i>	Channel 4	Hulu	Drama	2,944,195
7 <i>Orange Is The New Black</i>	Netflix	Netflix	Comedy Drama	2,838,109
8 <i>The Grand Tour</i>	Amazon Prime Video	Amazon Prime Video	Reality	2,596,074
9 <i>Marvel's Daredevil</i>	Netflix	Netflix	Action/Adventure	2,510,372
10 <i>Black Mirror</i>	Netflix	Netflix	Sci-Fi	2,310,453
11 <i>13 Reasons Why</i>	Netflix	Netflix	Drama	2,273,348
12 <i>Narcos</i>	Netflix	Netflix	Drama	1,887,292
13 <i>The Crown</i>	Netflix	Netflix	Drama	1,760,272
14 <i>Marvel's Jessica Jones</i>	Netflix	Netflix	Action/Adventure	1,543,355
15 <i>Ozark</i>	Netflix	Netflix	Drama	1,391,949
16 <i>The Man In The High Castle</i>	Amazon Prime Video	Amazon Prime Video	Sci-Fi	1,380,239
17 <i>The First</i>	Channel 4	Hulu	Sci-Fi	1,372,265
18 <i>Altered Carbon</i>	Netflix	Netflix	Sci-Fi	1,364,191
19 <i>Cobra Kai</i>	YouTube Premium	YouTube Premium	Comedy	1,322,655
20 <i>Marvel's Runaways</i>	Syfy UK	Hulu	Action and Adventure	1,322,349

A selection of 5 additional digital original series of interest:

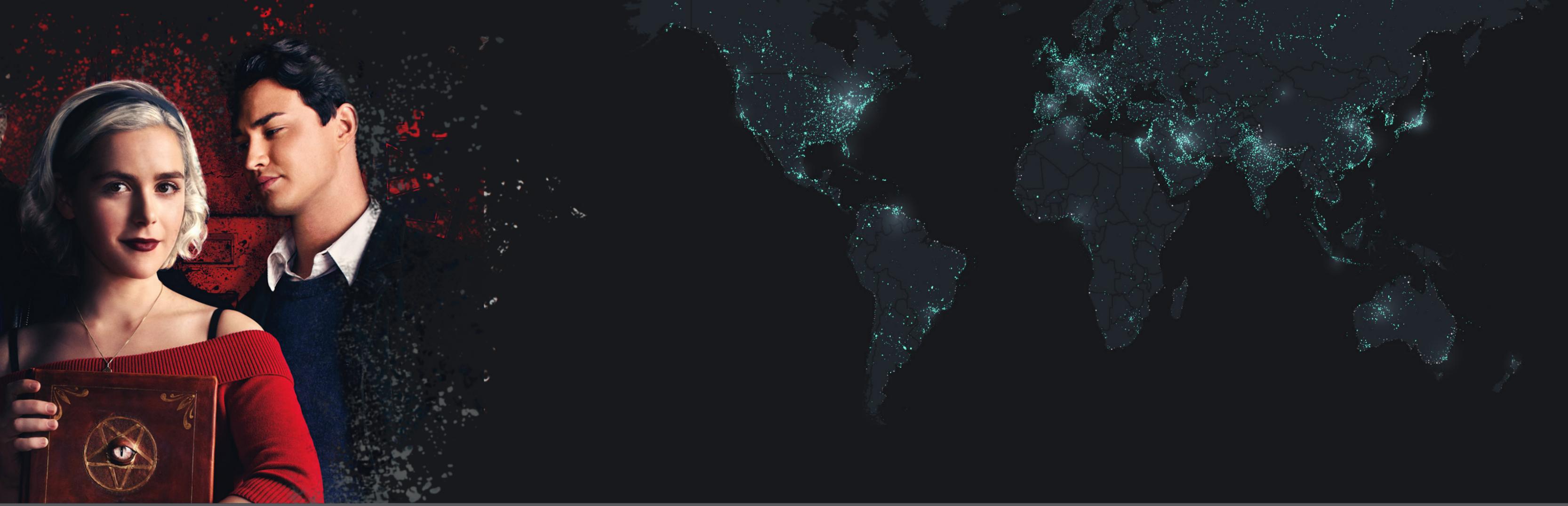
22 <i>Queer Eye</i>	Netflix	Netflix	Reality	1,275,693
28 <i>BoJack Horseman</i>	Netflix	Netflix	Comedy	1,079,525
42 <i>Homecoming</i>	Amazon Prime Video	Amazon Prime Video	Drama	820,034
50 <i>All Or Nothing: Manchester City</i>	Amazon Prime Video	Amazon Prime Video	Documentary	660,478
71 <i>Snatch</i>	AMC Global	Sony Crackle	Drama	517,407

* Distributor for most recent season in case of multiple platforms

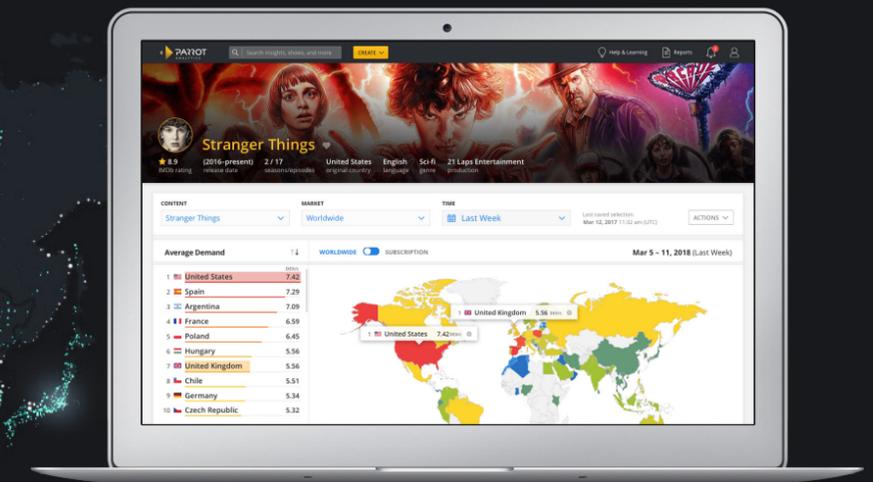
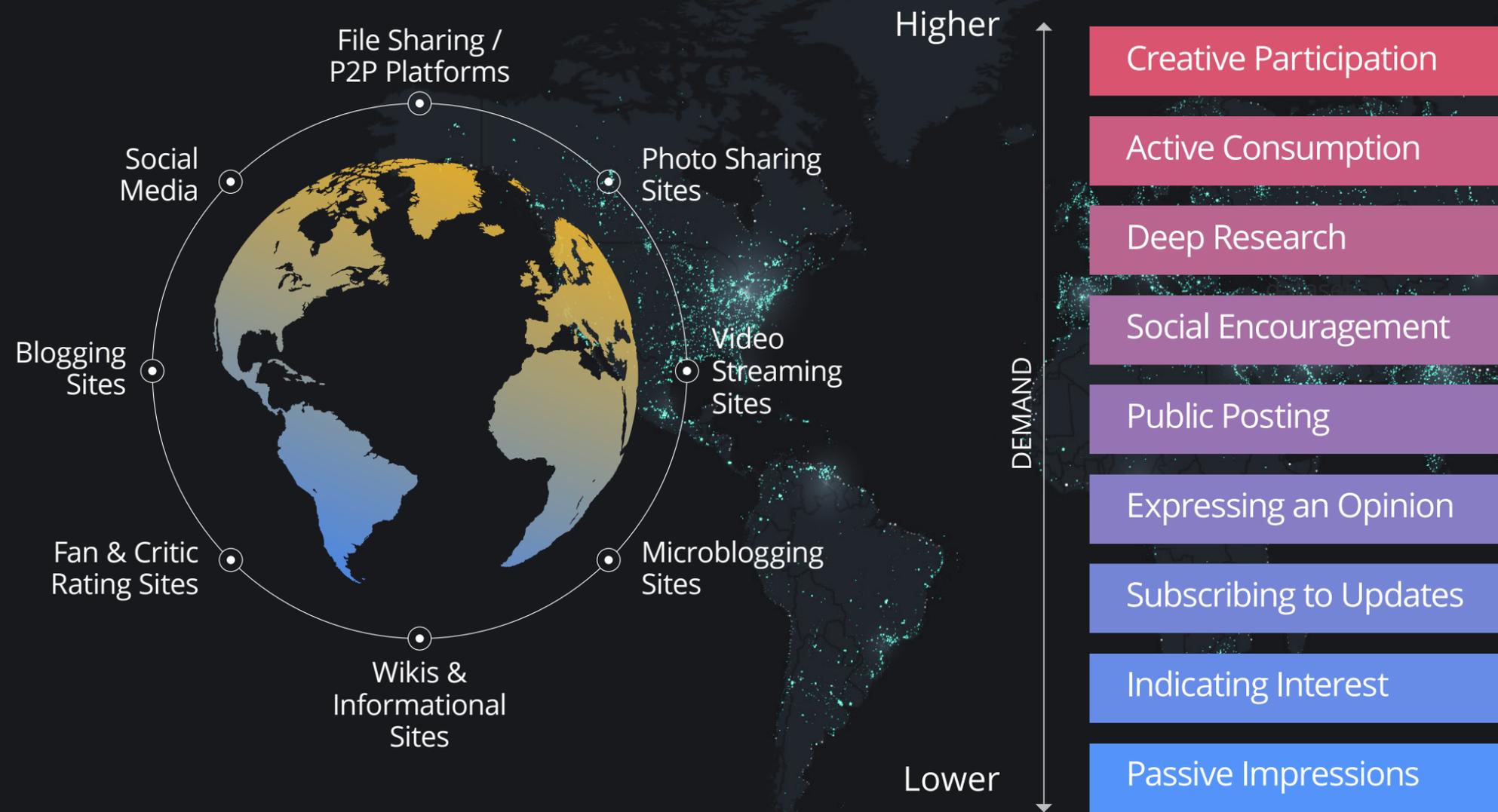
Appendix

The global demand measurement standard

Gain an understanding of Parrot Analytics' global demand measurement capabilities, how we define a "digital original" and how it is possible that content can generate demand in markets where a title or platform is not yet available.



The standard for global content demand measurement



GLOBAL DEMAND FOR CONTENT



Across platforms



In all languages



In all markets

We provide TV's only global content demand system

We capture the world's largest audience behavior datasets

We clean, enrich, combine and analyze the data

Definition of “Digital Original” series

We define a “digital original series” as a multi-episode series where the most recent season was produced or first made available on a streaming platform. Once we define a title as a digital original, we regard the original streaming platform to be the same in all markets. For example, *The Handmaid’s Tale* is considered a Hulu digital original, in all markets, even if Hulu is not currently available in a given territory.

Where a streaming platform has ordered a new season following a cancellation (e.g. *Lucifer* from Fox), we regard the series to be a network original until the new season is launched by the streaming platform; at that point we regard the series to be a “digital original”.

We therefore include, for example, *Black Mirror* in our definition of a digital original series. Originally on UK’s Channel 4 for the first two seasons, Netflix has since acquired the rights and commissioned seasons 3 and 4.

We include developed, acquired and co-licensed originals

Furthermore, we include in our definition all developed originals (titles that were developed, produced and released by the SVOD service that airs them, e.g. *Stranger Things*) as well as acquired originals (titles developed and produced by a third-party studio, but where the streaming platform has acquired exclusive rights to air the series, e.g. *The Crown*).

We think it is also fair to treat co-produced and co-licensed titles such as *The End of the F*** World* and *Frontier* as digital originals.

With the proliferation of new streaming platforms, sometimes a different platform is considered the original streaming network. Consider for example what the original network for *Star Trek: Discovery* should be? In our definition we take this to be CBS All Access, despite Netflix owning the exclusive rights to the series in most non-US markets. *Star Trek: Discovery* is therefore a digital original and we take CBS All Access to be the original (streaming) platform, not Netflix, in all markets.

We exclude licensed originals and licensed series

We exclude from our definition any licensed originals such as AMC’s *Better Call Saul* and NBC’s *The Good Place*. And, finally, we also exclude all licensed series such as *The Office* and *Friends* from our definition.

For more information, please refer to our helpdesk article, available [here](#).



Methodology for demand attribution to the original platform

You might be wondering how it is possible that content can generate demand in markets where a title or platform is not yet available.

The short answer is that audiences express demand for TV series irrespective of commercially negotiated rights.

News about new TV shows travels quickly, and often audiences the world over are eagerly anticipating the launch of a new series in their country. Our full-year 2017 Global TV Demand Report highlighted just how important social media is, for example, in the discovery of new TV shows: Within seconds a consumer in the UK can be notified of a new TV show to watch by their friends in the US - even if it is a "stealth release".

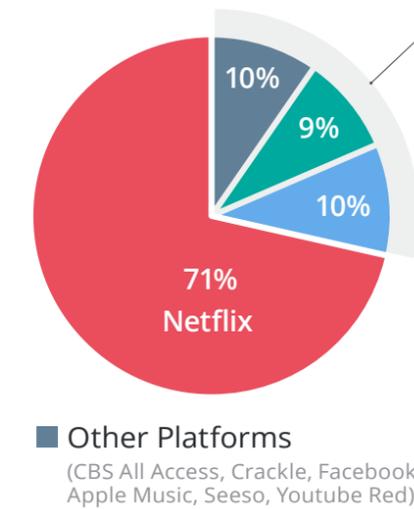
Because our global demand measurement system incorporates multiple country-specific content demand signals, we are able to gauge popularity for TV content long before a series, or platform, is officially released in its home market, or any other market.

In this example from 2017, Hulu is currently not available in the United Kingdom, yet it managed to attract 9% of the total digital originals UK demand share. How is this possible?

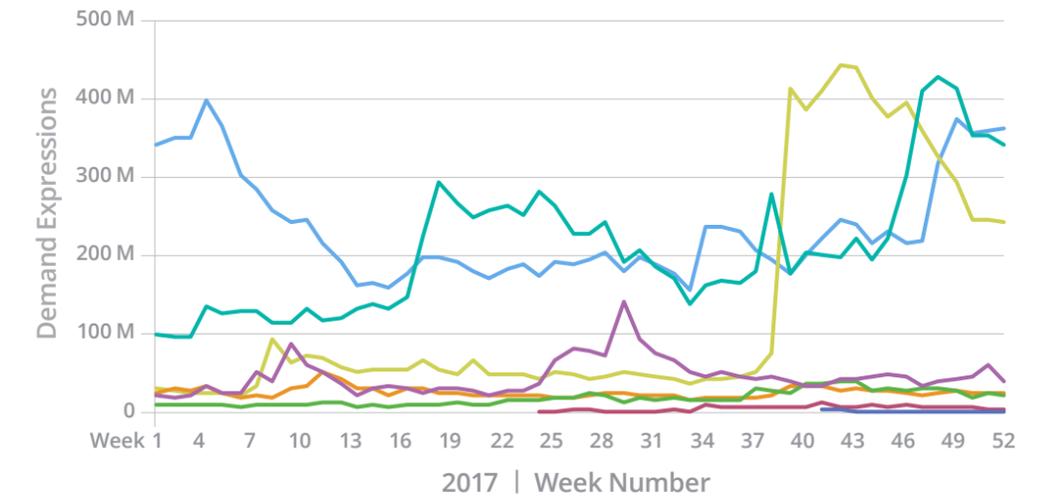
The answer is that Parrot Analytics quantifies the level of demand in any country for a show long before the rights have been agreed for a territory; we then attribute this local market demand to the original network/platform in that market (even if the platform has not yet launched in that market).

For more information please refer to our helpdesk article available [here](#).

Total share of demand for platforms in 2017



Total platform demand in 2017 (ex. Netflix)

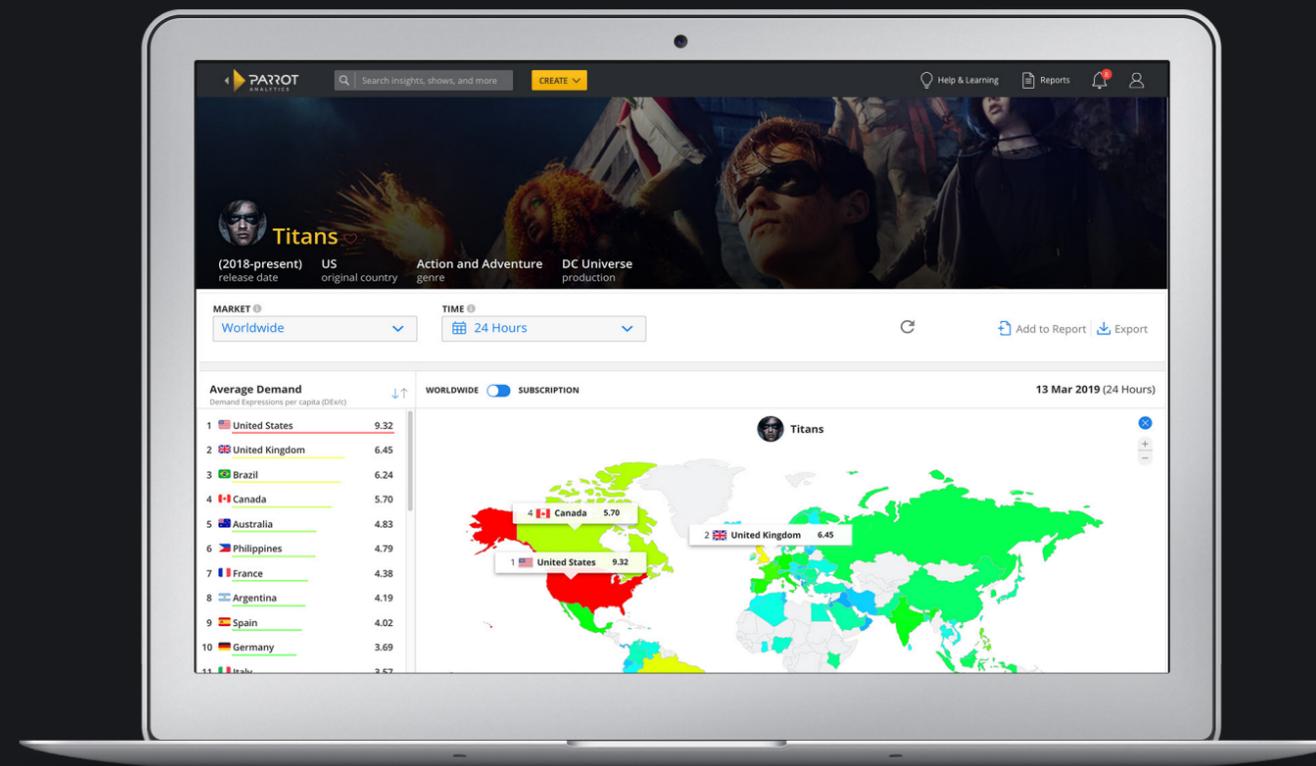


- Amazon Video
- CBS All Access
- Facebook
- Seeso
- Hulu
- Crackle
- Apple Music
- Youtube Red

The Global TV Demand Measurement Standard

Use global demand data to stack content negotiations in your favor. Schedule a software demo and learn how you can increase the value extracted from global content deals.

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