GENOME

SOCIAL

AFFINITY

TRAVELABILITY

BRAND

GENRE

DEMAND

TITLE

PLATFORM

TRENDS

MARKET

TIME

DEMOGRAPHICS

SENTIMENT

RECOMMENDATIONS

DISCOVERY

# The Global Television Demand Report

Digital original series popularity, TV demand trends and Global SVOD subscription purchase propensity study for 1st Quarter 2018

**PARROT** ANALYTICS

# Executive Summary

January–March, 2018

- *Stranger Things* remains the most popular digital original series in most markets, though the release of the second half of *Star Trek: Discovery* made this the most popular digital original series in the US, UK and Switzerland.

- In the US, UK, and Brazil, over 40% of the population say they would not pay for an SVOD platform, but in Italy almost 39% would pay for one subscription and another 32% would pay for two.

- New platform content rose in popularity:

- *Stargate Origins*, on the niche website Stargate Command, ranked among the top 25 digital originals in most markets.

- The Facebook Watch series *Comeback Kids: Animal Edition* ranked 25th by demand among digital originals in the US.

- *BTS: Burn the Stage*, the latest YouTube Red documentary about a K-pop group, ranked among the top 100 digital originals in most markets.
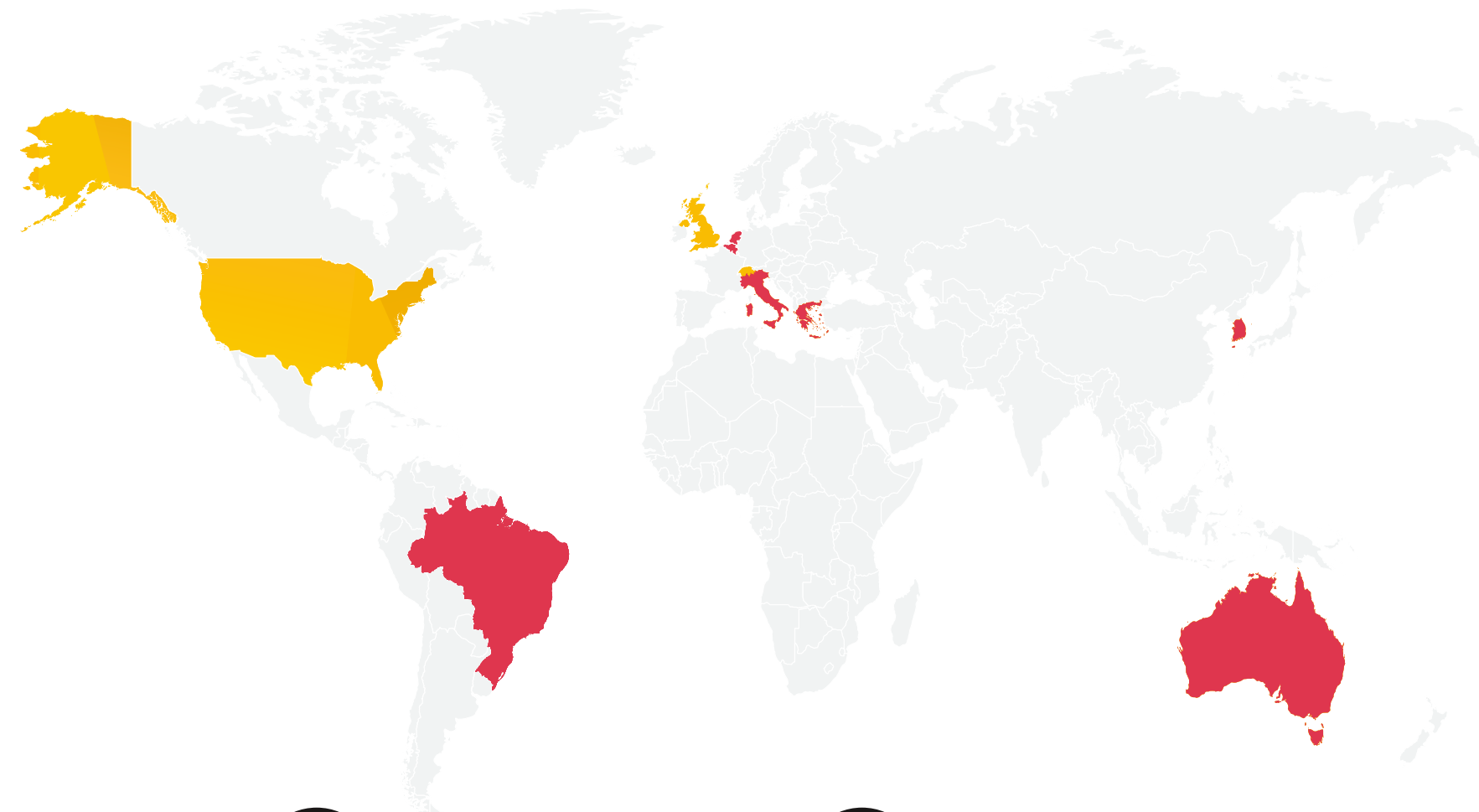
### Stranger Things

- *Brazil*
- *Belgium*
- *Greece*
- *Italy*
- *Australia*
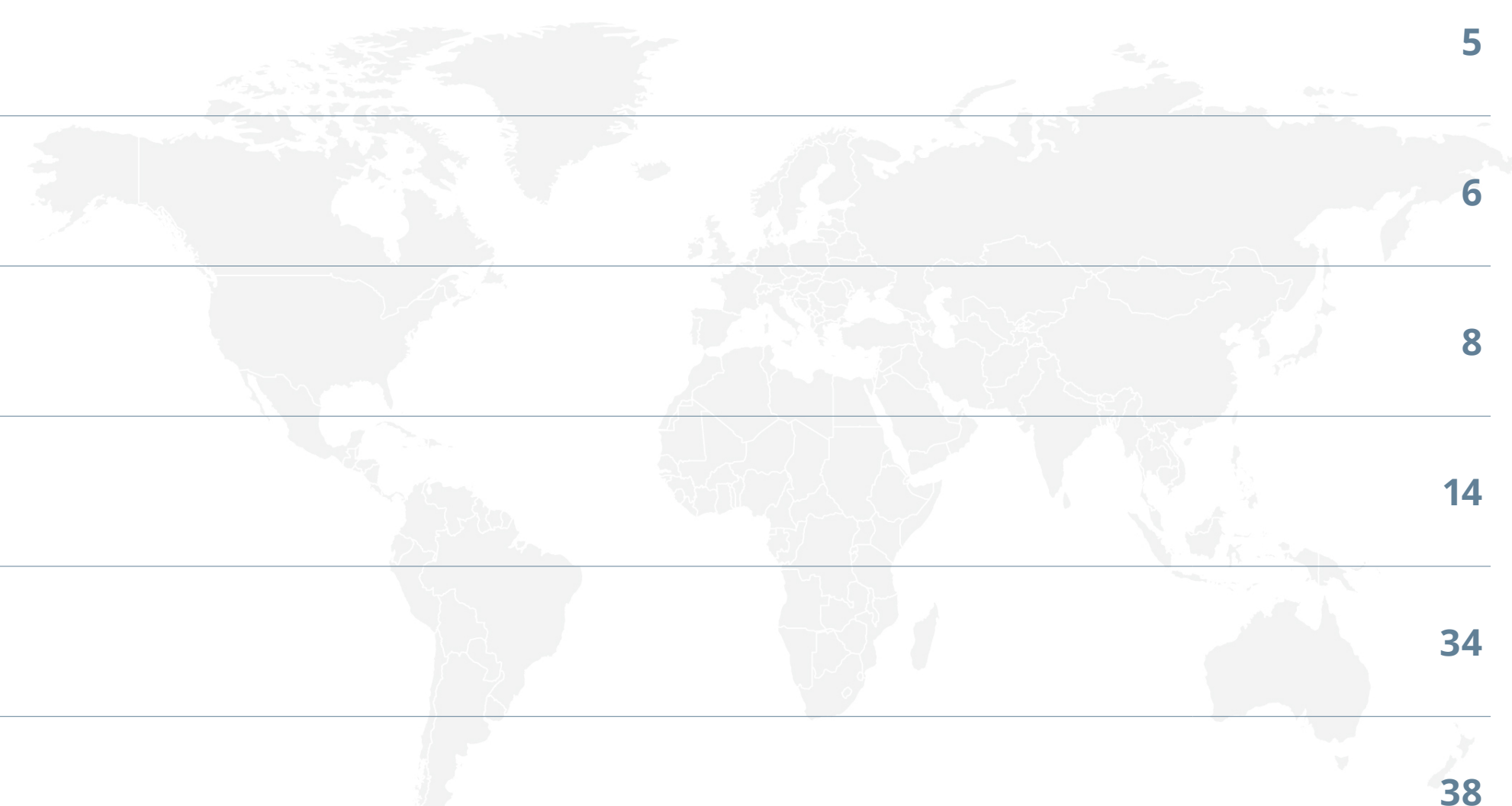- *South Korea*
- *Netherlands*
- *Switzerland*

### Star Trek: Discovery

- *United States*
- *United Kingdom*

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# Contents

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# Introduction

## Demand as the new paradigm

In this tenth edition of **Parrot Analytics'** **Global Television Demand Report**, the demand for all digital original series in ten global markets was analyzed over the first quarter of 2018. These digital original series are original content produced by SVOD platforms around the world, including the major services Netflix, Hulu, and Amazon, as well as smaller players such as Crackle, YouTube Red and Facebook Watch. 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.
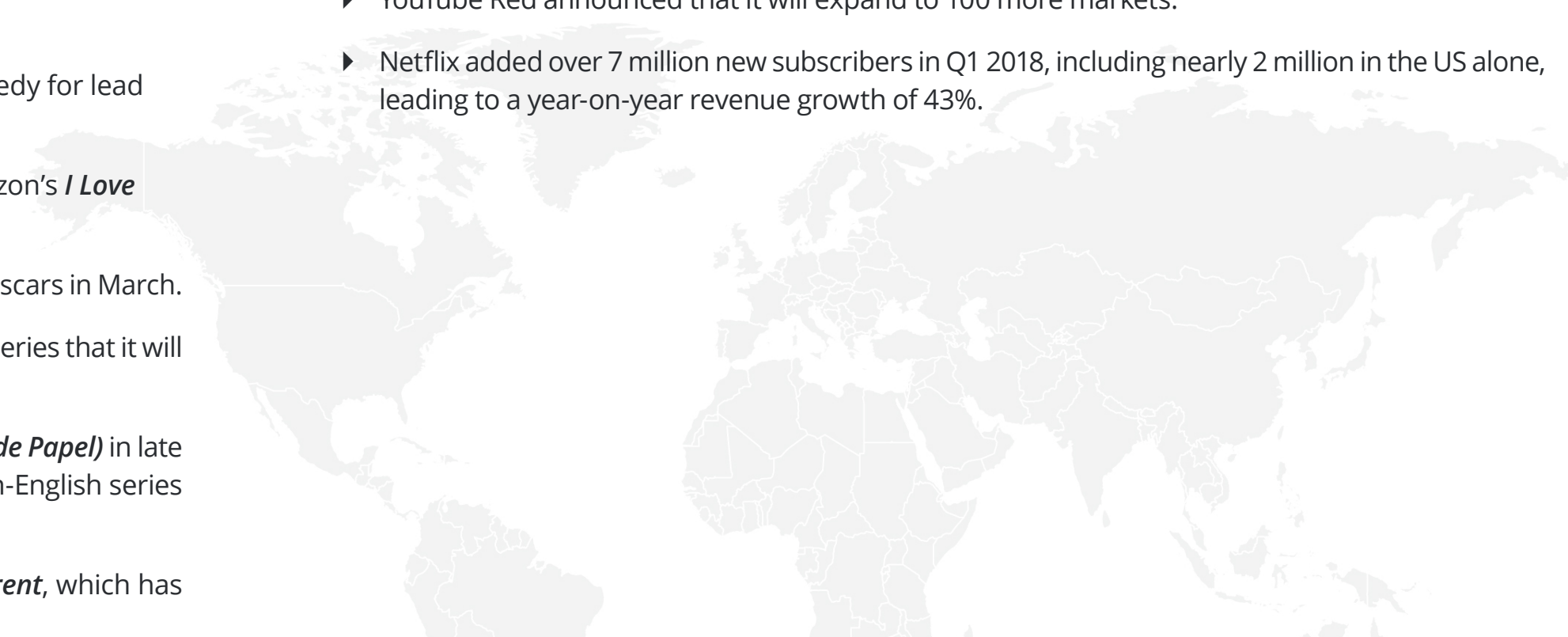
In an industry traditionally guided by intuition and gut feelings, gaining insights into the actual demand for content, no matter the platform or market, is a definite **competitive advantage**.

**Download**  *Parrot Analytics' comprehensive whitepapers, industry analyses and global TV demand case studies.*

# Quarterly Events

- Digital original series were quite successful at the 75th Golden Globes that were held on January 7th:
  - Hulu's *The Handmaid's Tale* won both Best Drama and Best Performance in a Television Series Drama for lead Elisabeth Moss.
  - Amazon's *The Marvelous Ms. Maisel* won both Best Comedy and Best Performance in a Television Series Comedy for lead Rachel Brosnahan.
  - Netflix's *Master of None* won Best Performance in a Television Series Comedy for lead Aziz Ansari.
  - Netflix's *Stranger Things, The Crown, 13 Reasons Wh*y, and *GLOW*, and Amazon's *I Love Dick* also received nominations.
- Netflix's *Icarus* won the Academy Award for Best Documentary Feature at the Oscars in March.
- Netflix released *Devilman Crybaby* in early January, the first of about 30 anime series that it will release on the platform in 2018.
- Netflix acquired, re-edited, and released a Spanish series *Money Heist (La Casa de Papel)* in late December; in April the platform announced that it was the most-watched non-English series ever.
- Amid sexual harassment allegations, Jeffrey Tambor was fired from *Transparent*, which has delayed the production of the show's fifth season.

- Reuters summarized internal documents from Amazon, revealing that about 26 million Prime customers watched videos on the platform. Separately, it was revealed that the company could spend up to $500 million on its *Lord of the Rings* series, which would make it the most expensive TV series ever.
- YouTube Red announced that it will expand to 100 more markets.
- Netflix added over 7 million new subscribers in Q1 2018, including nearly 2 million in the US alone, leading to a year-on-year revenue growth of 43%.

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# New Digital Original Series Released this Quarter

January–March, 2018

| Title | Original Platform | Genre | Premiere Date |
|---|---|---|---|
| We Speak Dance | Netflix | Documentary | 1-Jan-18 |
| Romper Stomper | Stan (Australia) | Drama | 1-Jan-18 |
| Rotten | Netflix | Documentary | 5-Jan-18 |
| Devilman Crybaby | Netflix | Anime | 5-Jan-18 |
| Night In/Night Out | Facebook Watch | Reality | 9-Jan-18 |
| Quinta Vs. Everything | Facebook Watch | Reality | 9-Jan-18 |
| My Next Guest Needs No  Introduction With David Letterman | Netflix | Talk Show | 12-Jan-18 |
| Somebody Feed Phil | Netflix | Documentary | 12-Jan-18 |
| La Peste | Movistar+ (Spain) | Drama | 12-Jan-18 |
| Worth It: Cities | Facebook Watch | Reality | 16-Jan-18 |
| Trolls: The Beat Goes On! | Netflix | Children | 19-Jan-18 |
| Drug Lords | Netflix | Documentary | 19-Jan-18 |
| Pastewka | Amazon Video | Comedy | 26-Jan-18 |
| Breathe | Amazon Video | Drama | 26-Jan-18 |
| Britannia | Amazon Video | Drama | 26-Jan-18 |
| Dirty Money | Netflix | Documentary | 26-Jan-18 |
| Llama Llama | Netflix | Children | 26-Jan-18 |
| The Hangover Show | Facebook Watch | Reality | 26-Jan-18 |
| Step Up: High Water | YouTube Red | Drama | 31-Jan-18 |
| Botoks | Showmax (Poland) | Drama | 31-Jan-18 |
| Altered Carbon | Netflix | Science Fiction | 2-Feb-18 |
| Coach Snoop | Netflix | Documentary | 2-Feb-18 |
| Mira Lo Que Has Hecho | Movistar+ (Spain) | Comedy | 6-Feb-18 |
| Queer Eye | Netflix | Reality | 7-Feb-18 |
| Grand Prix Driver | Amazon Video | Documentary | 9-Feb-18 |
| Stargate Origins | StargateCommand.com | Science Fiction | 14-Feb-18 |
| Everything Sucks! | Netflix | Comedy | 16-Feb-18 |
| First Team: Juventus | Netflix | Documentary | 16-Feb-18 |

| *Demand Expressions®: The total audience demand being expressed for a title, within a country, on any platform.*

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# New Digital Original Series Released this Quarter

January–March, 2018

| Title | Original Platform | Genre | Premiere Date |
|---|---|---|---|
| Reverse Ratings | Facebook Watch | Comedy | 16-Feb-18 |
| Inside The Madness: Kentucky Basketball | Facebook Watch | Sports | 17-Feb-18 |
| The Oath | Crackle | Drama | 18-Feb-18 |
| The Joel McHale Show With Joel McHale | Netflix | Talk Show | 18-Feb-18 |
| Advokaten | Viaplay (Nordics) | Drama | 22-Feb-18 |
| Seven Seconds | Netflix | Drama | 23-Feb-18 |
| Ugly Delicious | Netflix | Documentary | 23-Feb-18 |
| The Looming Tower | Hulu | Drama | 28-Feb-18 |
| Flint Town | Netflix | Documentary | 2-Mar-18 |
| Girls Incarcerated | Netflix | Documentary | 2-Mar-18 |
| B: The Beginning | Netflix | Anime | 2-Mar-18 |
| Youth & Consequences | YouTube Red | Comedy | 7-Mar-18 |
| The Remix | Amazon Video | Reality | 9-Mar-18 |
| Nailed It! | Netflix | Reality | 9-Mar-18 |
| A.I.C.O. Incarnation | Netflix | Anime | 9-Mar-18 |
| #Wargames | helloeko.com | Drama | 14-Mar-18 |
| Edha | Netflix | Drama | 16-Mar-18 |
| On My Block | Netflix | Drama | 16-Mar-18 |
| Wild Wild Country | Netflix | Documentary | 16-Mar-18 |
| Alexa & Katie | Netflix | Comedy | 23-Mar-18 |
| O Mecanismo | Netflix | Drama | 23-Mar-18 |
| Sword Gai: The Animation | Netflix | Anime | 23-Mar-18 |
| High Road | Lightbox (NZ) | Drama | 23-Mar-18 |
| Nori Roller Coaster Boy | Lightbox (NZ) | Children | 23-Mar-18 |
| BTS: Burn The Stage | YouTube Red | Documentary | 28-Mar-18 |
| The Dangerous Book For Boys | Amazon Video | Comedy Drama | 30-Mar-18 |
| Rapture | Netflix | Documentary | 30-Mar-18 |
| Lost Song | Netflix | Anime | 31-Mar-18 |

## Parrot Analytics Global Research

January–March, 2018

# Global SVOD subscription purchase propensity study

In this first section we explore how many video streaming services consumers are willing to subscribe to. We have compiled this information from a multi-language survey carried out by Parrot Analytics involving 2,000 study participants in 4 global markets.

Note: Unlike the next section, data in this section is based on audience panel data.
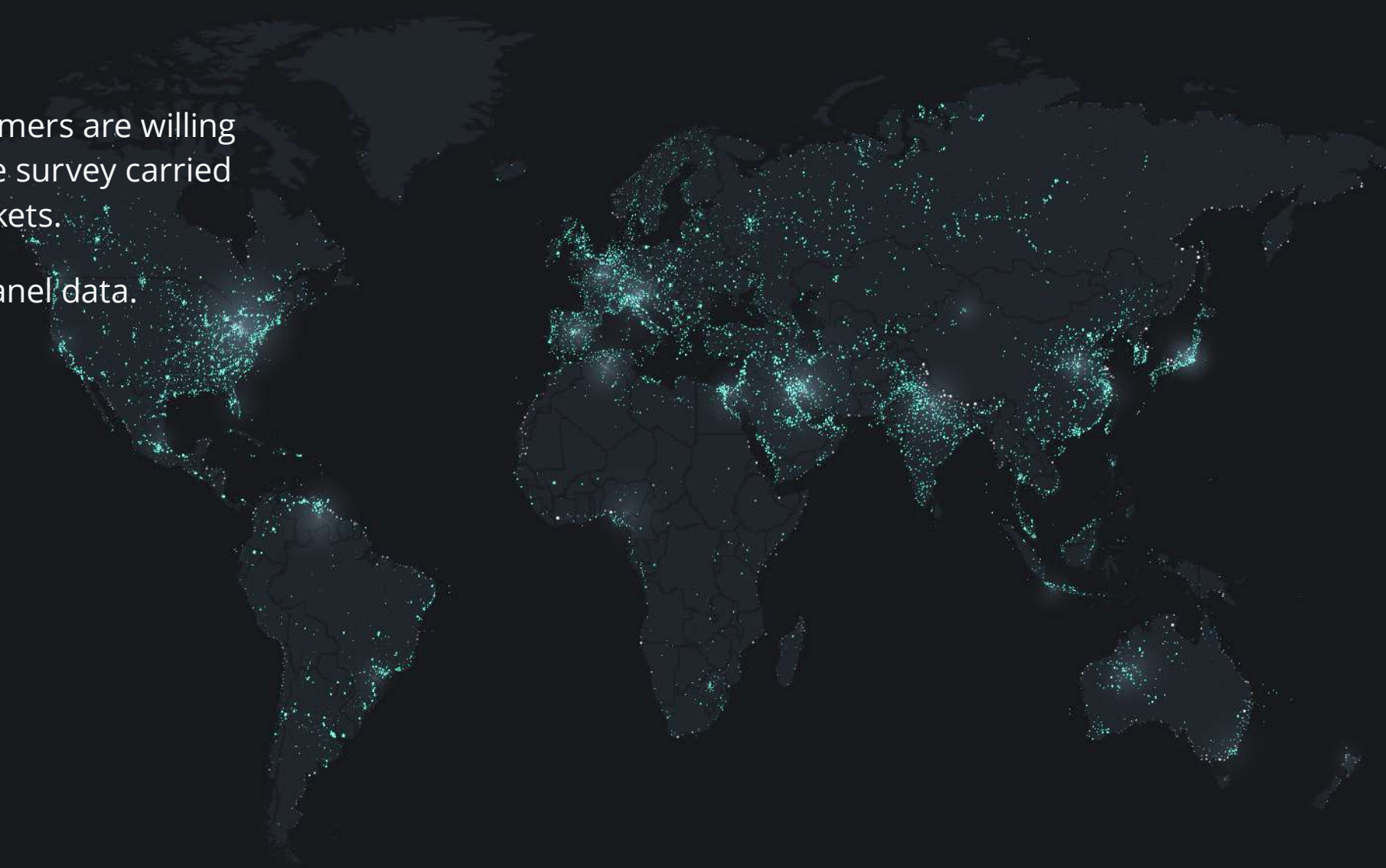
## Parrot Analytics Global SVOD Subscription Survey

January–March, 2018

# Brazil

Understand how willing audiences are in Brazil to subscribe to one or more platform and how age and gender influences their subscription preferences.
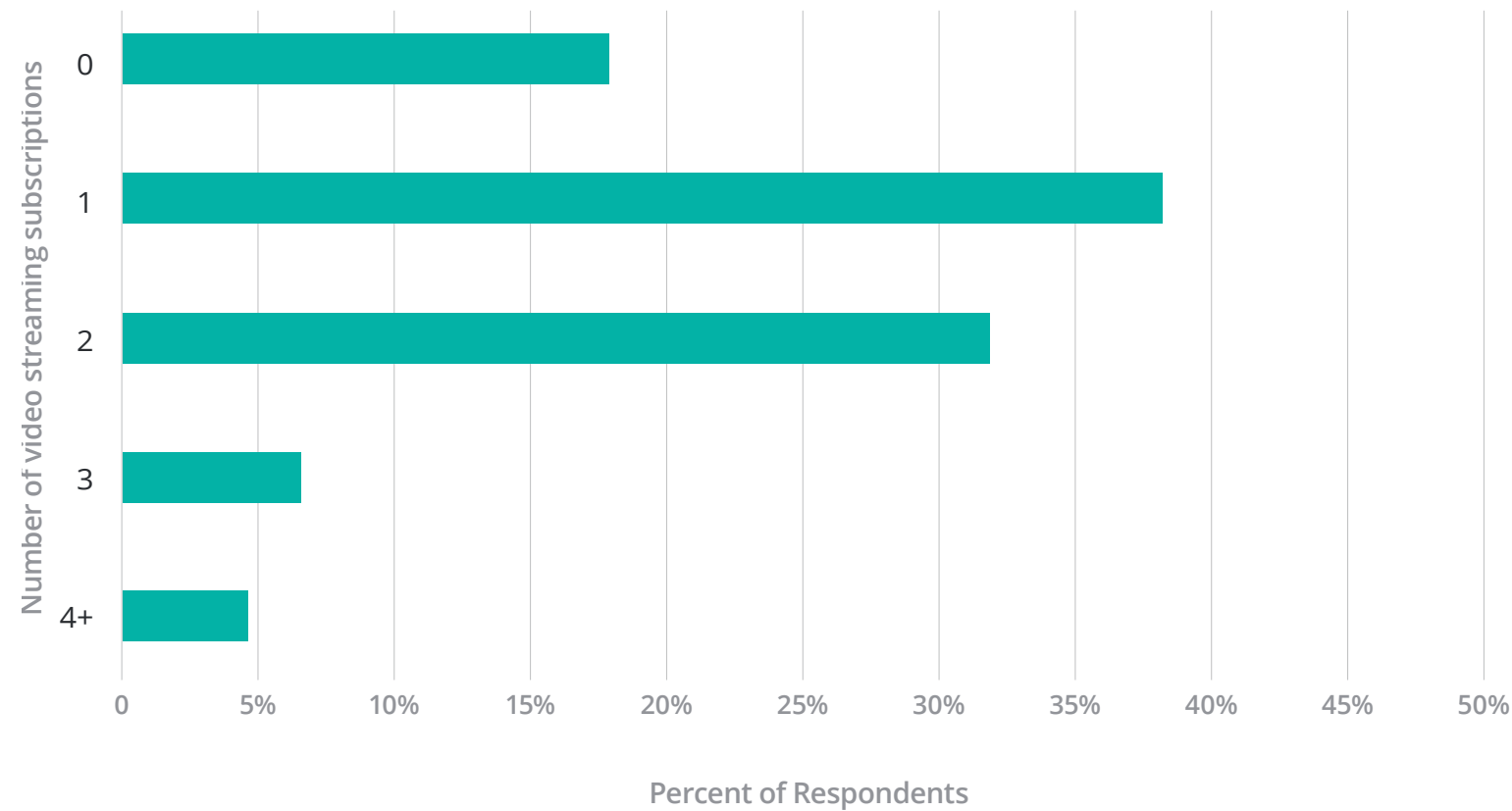
Note: The information in this section is based on a global survey carried out by Parrot Analytics in March 2018; all data in this section are based on country audience panels. Conversely, the data in the following section *are not* based on audience panel data.

# Willingness to pay for SVOD subscriptions in Brazil

January–March, 2018

## Number of streaming subscriptions consumers are willing to pay for

## Breakdown by gender

## Breakdown by age



18–24   25–34   35–44   45–54   55–64   65+
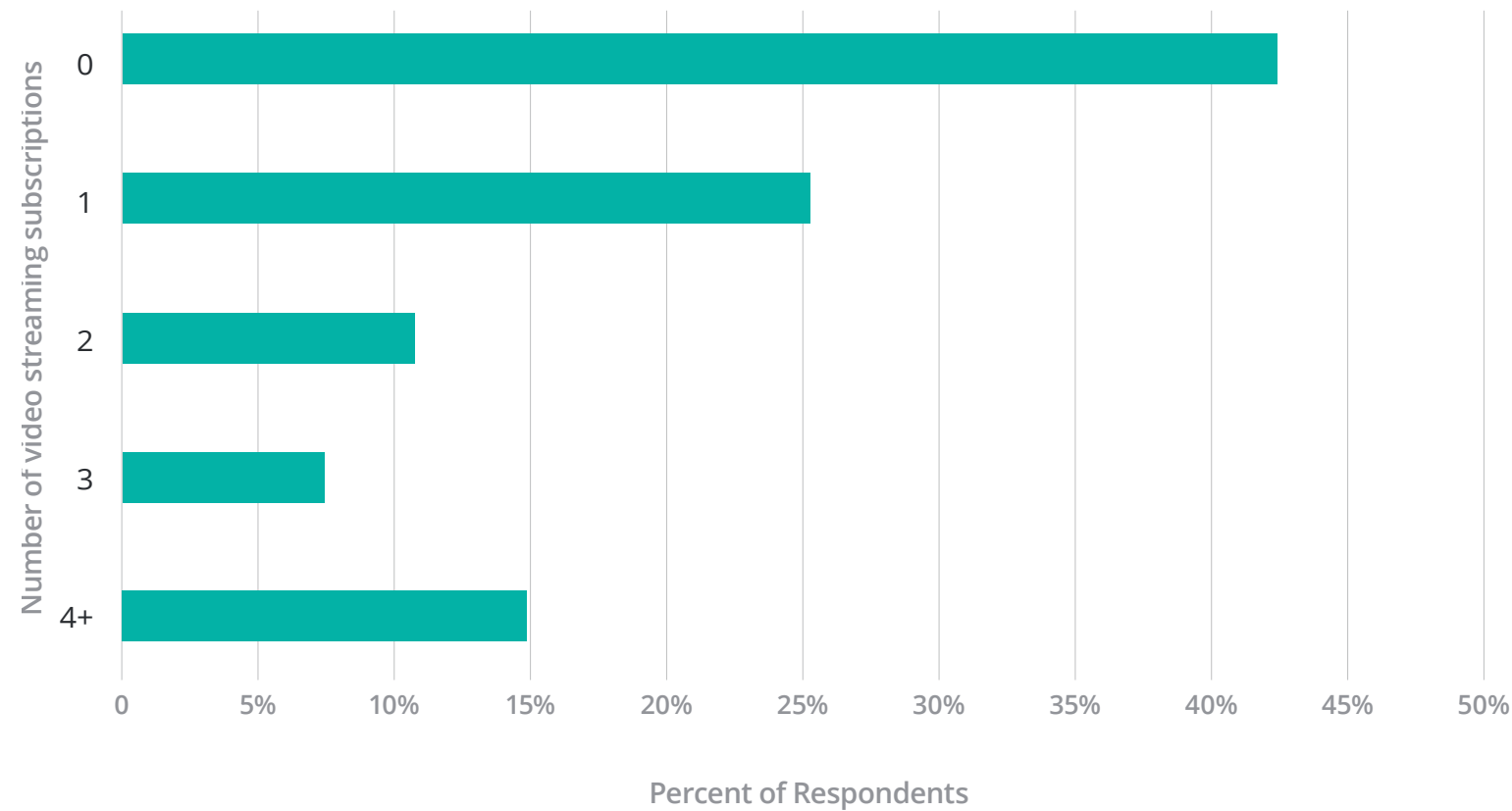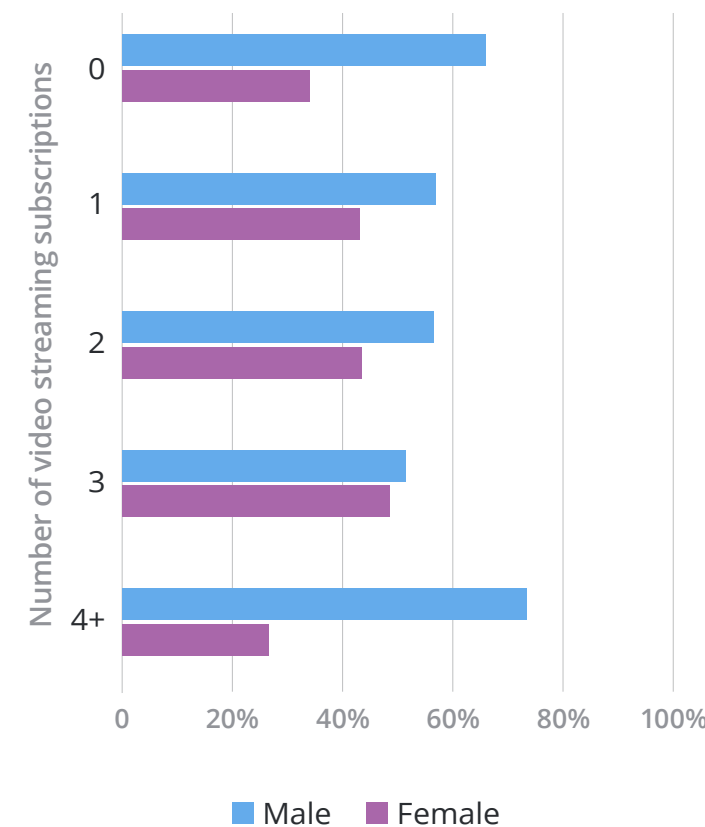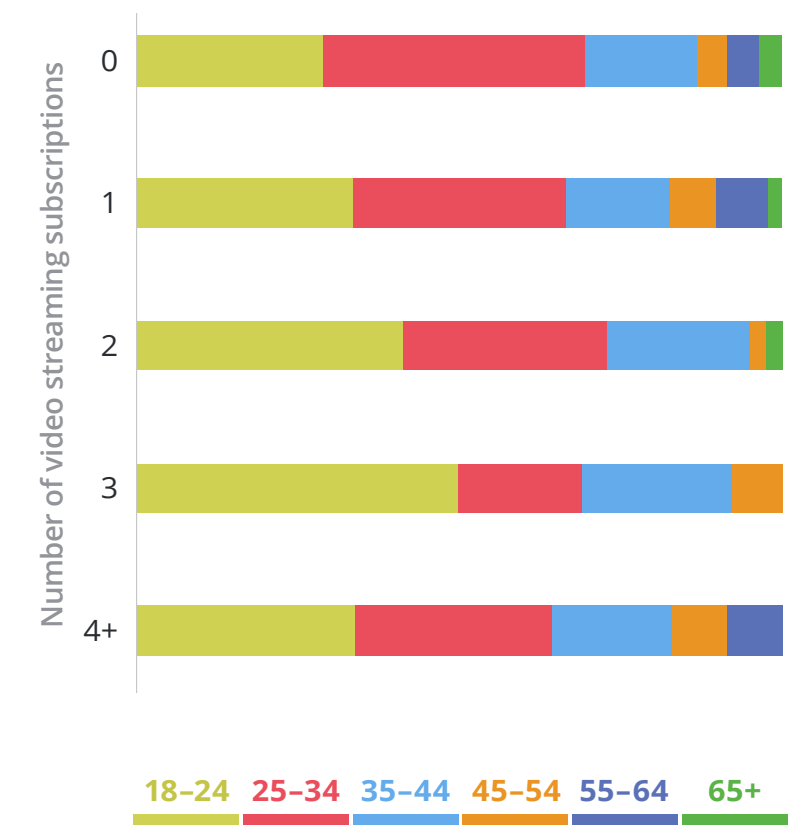
- Over 40% of people in Brazil are not willing to subscribe to any video subscription streaming services.

- While 25% of people would pay for one subscription, a greater percentage than in the US or UK, only 10% would pay for two, the lowest of these four markets.

- Brazil has registered the greatest percentage of people among the markets examined that are willing to pay for 4 or more video subscriptions; of these, over a third are aged 18 to 24.

- Overwhelmingly it is Brazilian males that are willing to pay for four or more SVOD services.

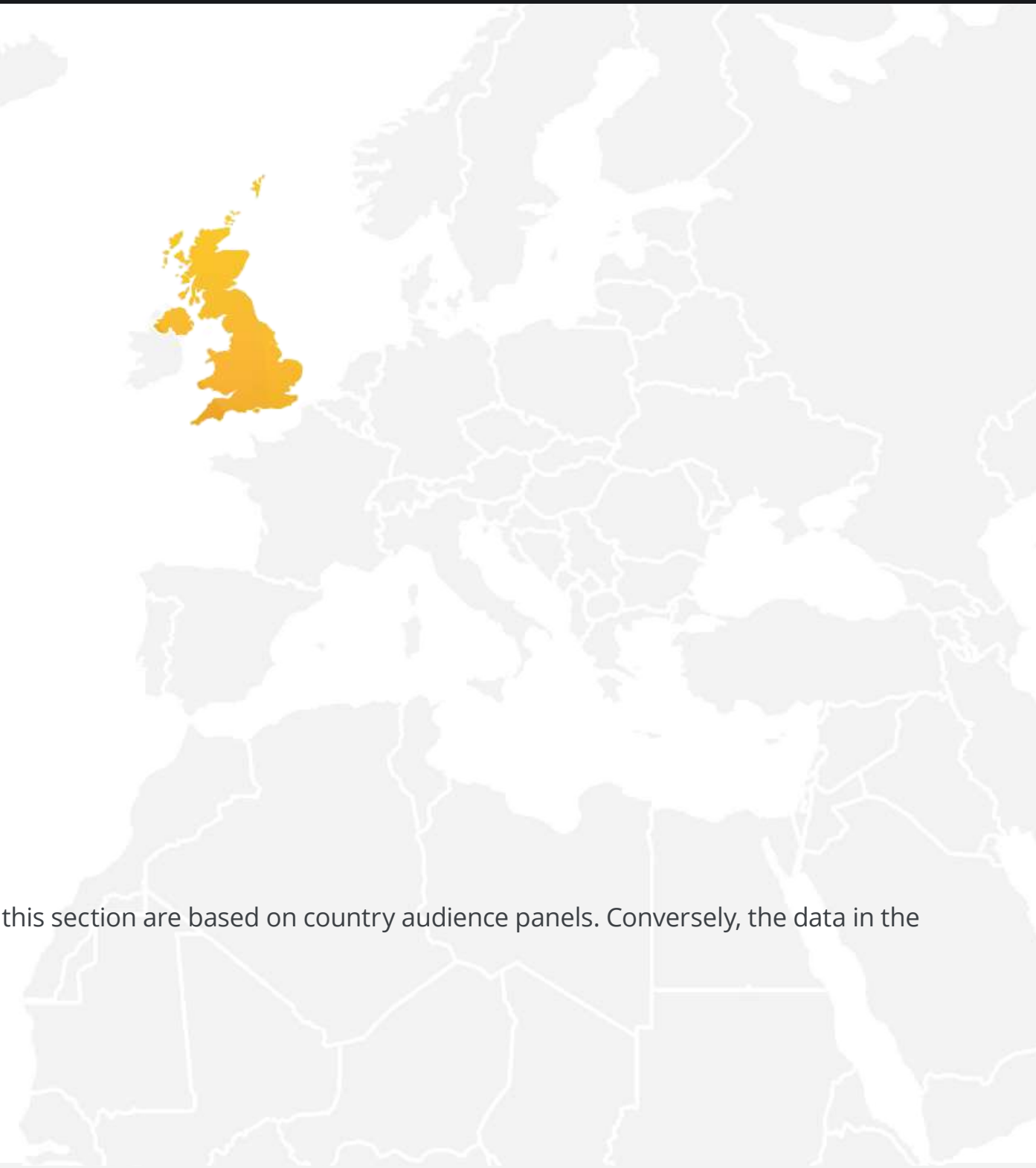| *Source:* Global SVOD subscription purchase propensity survey, carried out in 4 markets by Parrot Analytics (March 2018, n=2,000).

# Parrot Analytics Global SVOD Subscription Survey

January–March, 2018

## Italy

Understand how willing audiences are in Italy to subscribe to one or more platform and how age and gender influences their subscription preferences.

Note: The information in this section is based on a global survey carried out by Parrot Analytics in March 2018; all data in this section are based on country audience panels. Conversely, the data in the following section *are not* based on audience panel data.

*Source:* Global SVOD subscription purchase propensity survey, carried out in 4 markets by Parrot Analytics (March 2018, n=2,000).

# Willingness to pay for SVOD subscriptions in Italy

January–March, 2018

### Number of streaming subscriptions consumers are willing to pay for

### Breakdown by gender

### Breakdown by age



Percent of Respondents

■ Male  ■ Female

**18–24  25–34  35–44  45–54  55–64  65+**
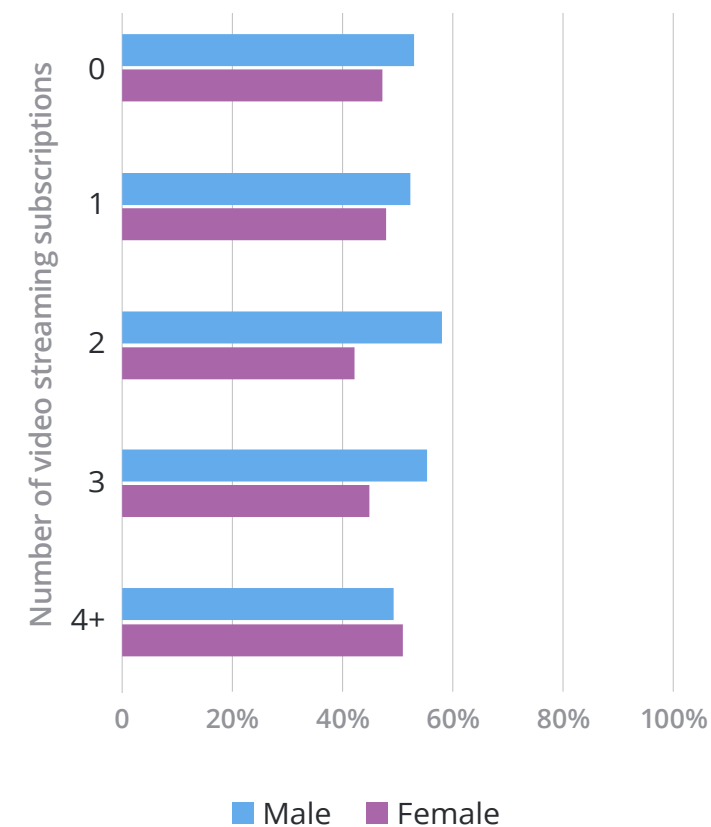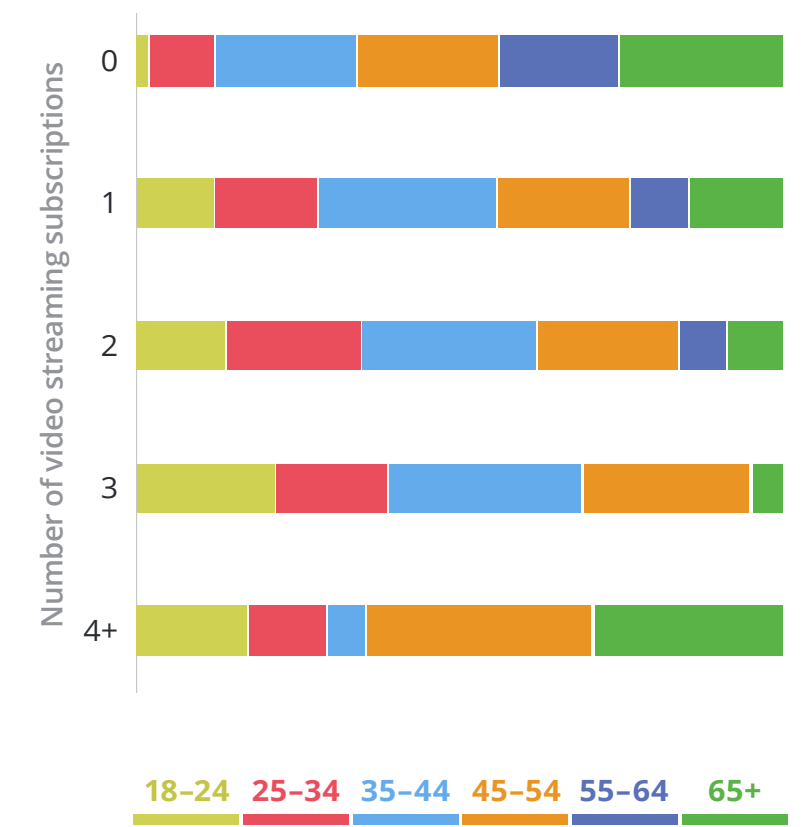
▸ Italy was the "odd market out" in this survey as only 18% of people in this territory are not willing to subscribe to a subscription video streaming service. In the other three markets examined over 40% are not willing to pay for a SVOD subscription.

▸ Over 70% of people in Italy are willing to subscribe to one or two SVOD services, far more than in the US, UK, or Brazil.

▸ Italy has registered the lowest percent of people willing to subscribe to 3 services of the 4 markets examined; about 56% of these are aged 35 to 54.

▸ Across all age groups, Italian males are more willing to pay for SVOD services. Females do not want to pay for any paid streaming services, by a small margin.

| *Source:* Global SVOD subscription purchase propensity survey, carried out in 4 markets by Parrot Analytics (March 2018, n=2,000).

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## Parrot Analytics Global SVOD Subscription Survey

January–March, 2018

# United Kingdom

Understand how willing audiences are in the United Kingdom to subscribe to one or more platform and how age and gender influences their subscription preferences.
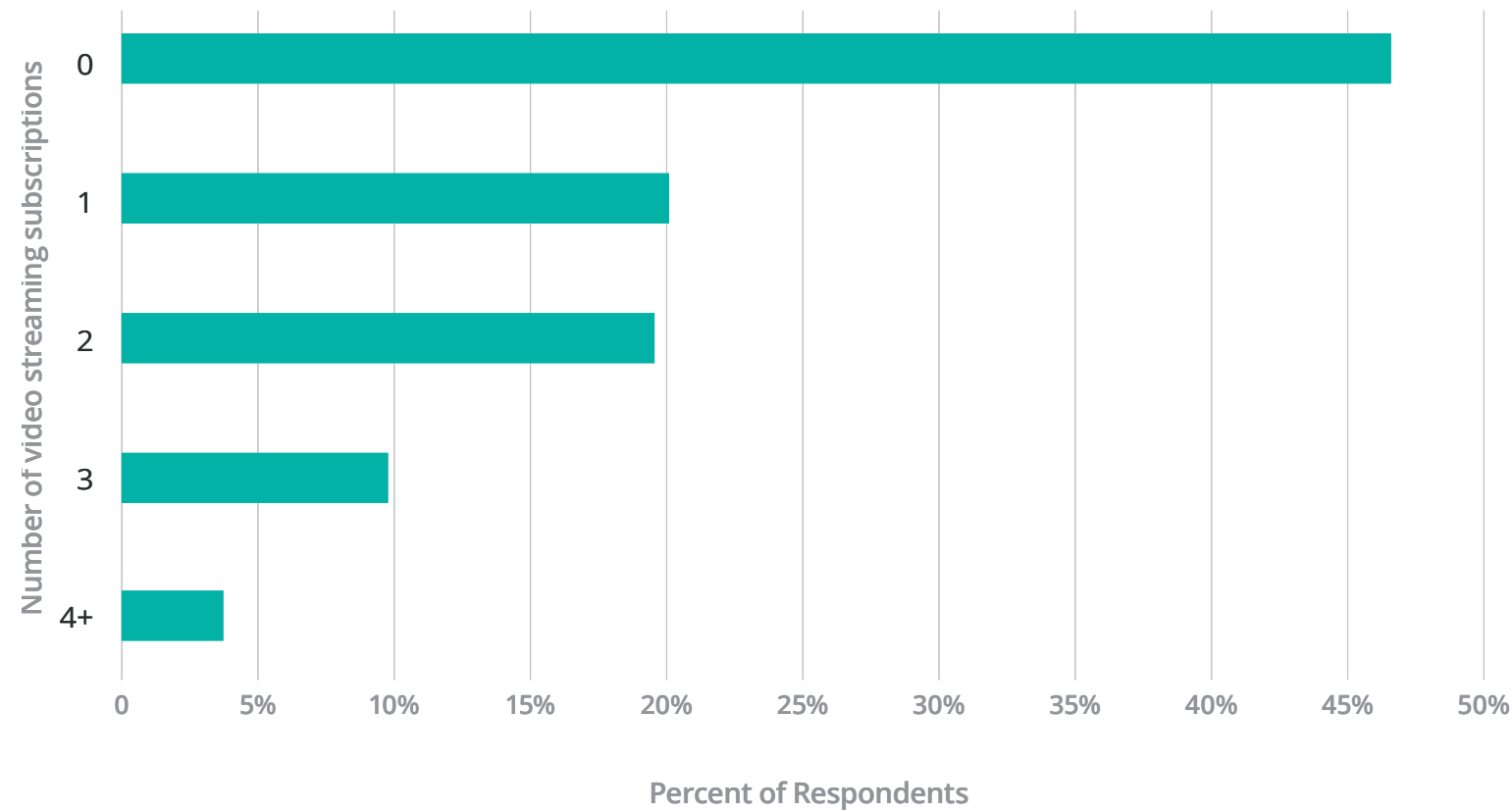
Note: The information in this section is based on a global survey carried out by Parrot Analytics in March 2018; all data in this section are based on country audience panels. Conversely, the data in the following section are not based on audience panel data.

*Source:* Global SVOD subscription purchase propensity survey, carried out in 4 markets by Parrot Analytics (March 2018, n=2,000).

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# Willingness to pay for SVOD subscriptions in the United Kingdom

January–March, 2018



**Number of streaming subscriptions consumers are willing to pay for**

**Breakdown by gender**

**Breakdown by age**

Male ■ Female

18–24  25–34  35–44  45–54  55–64  65+
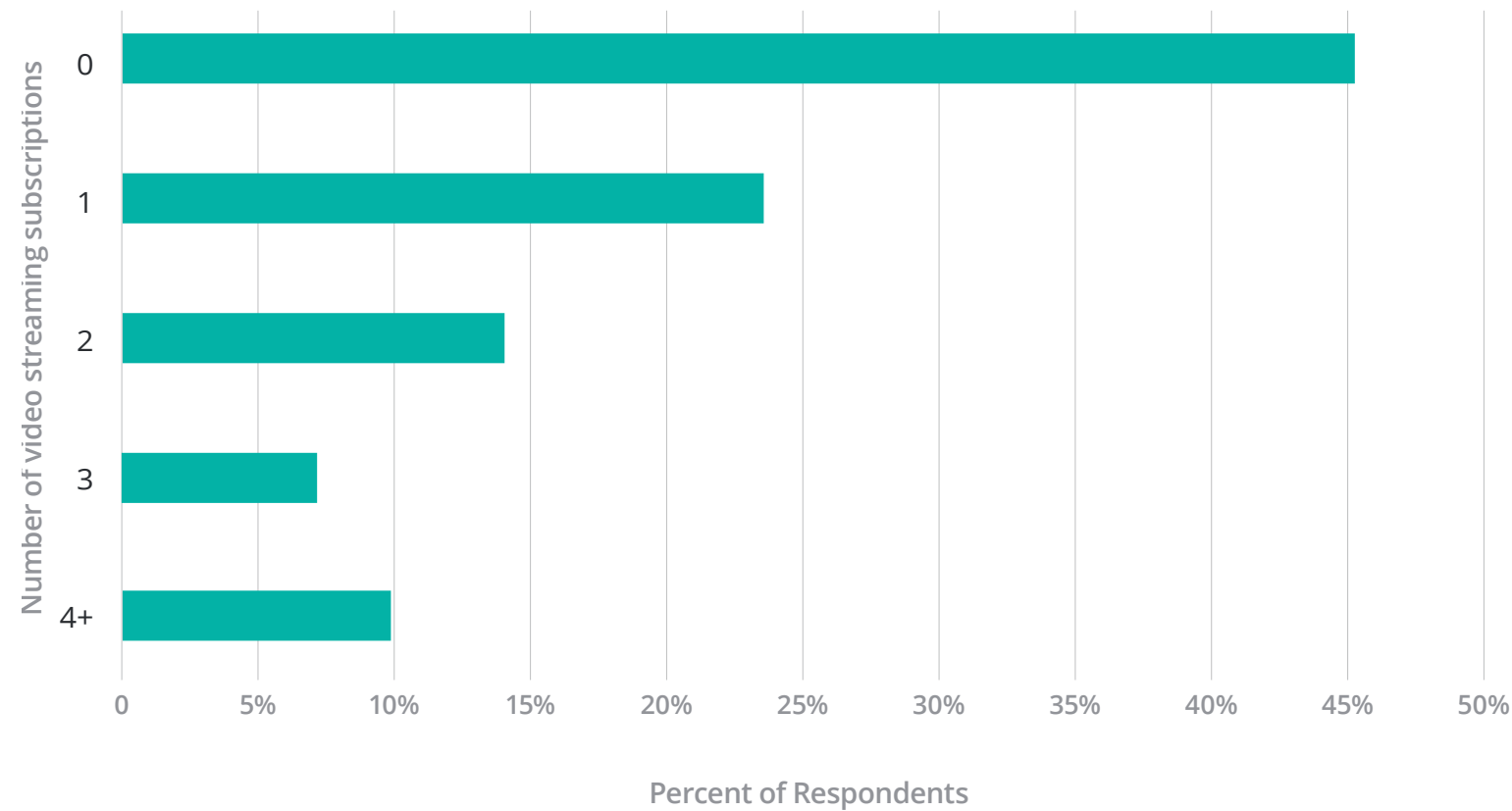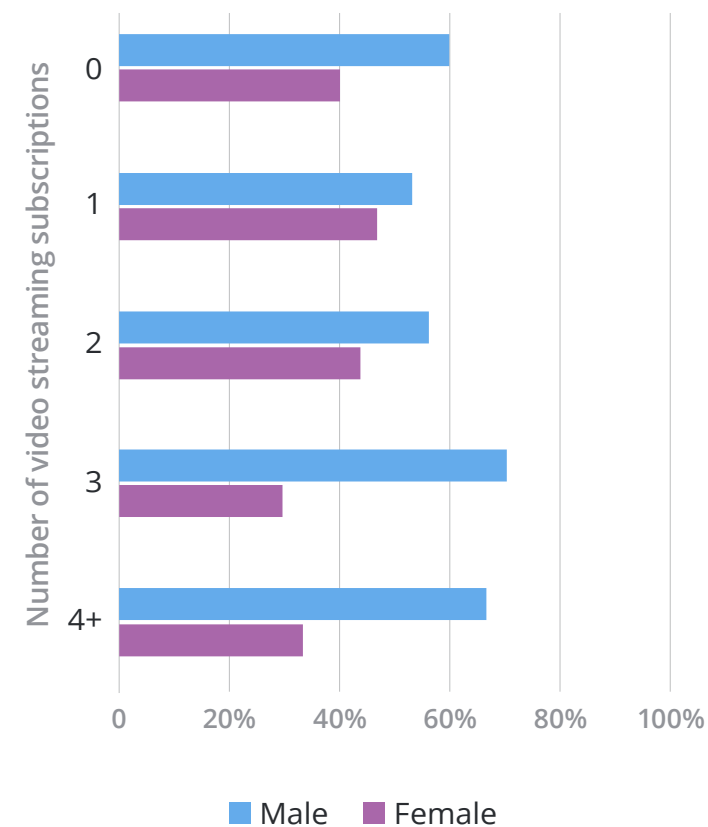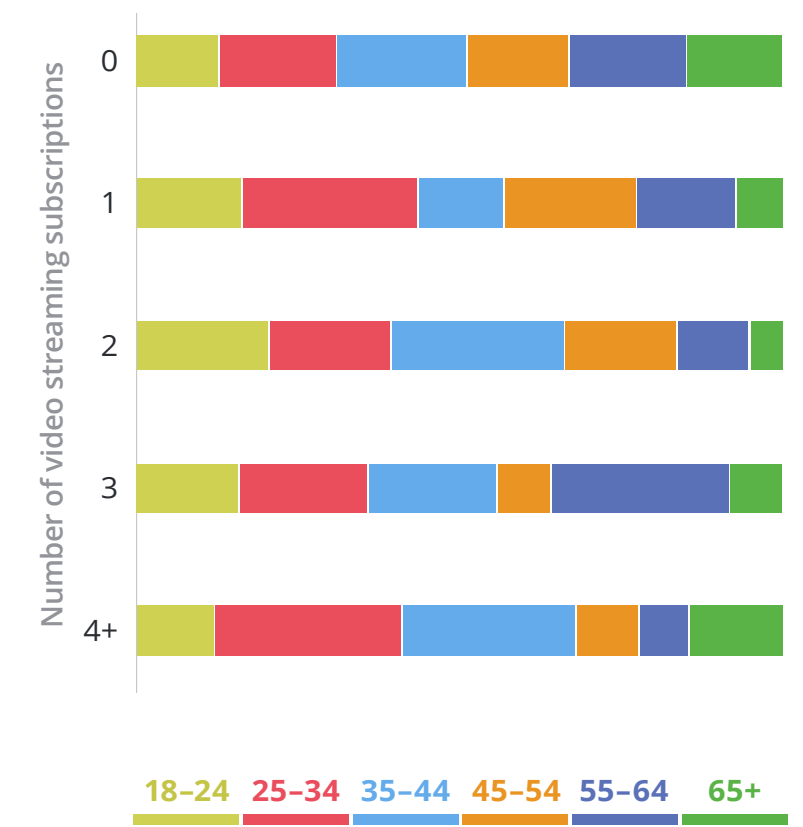
- ▸ Over 45% percent of respondents are not willing to subscribe to any video subscription streaming services in the United Kingdom.

- ▸ A greater percentage of people in the United Kingdom are willing to pay for one service than in the United States. Separately, more people in the UK are willing to pay for four or more services than for three services.

- ▸ People aged 55 to 64 make up 28% of subscribers to 3 platforms, while people aged 25 to 34 make up 29% of subscribers to 4 or more platforms.

- ▸ Across all age groups, UK males are more willing to pay for SVOD services, especially for 3 or more.

| *Source:* Global SVOD subscription purchase propensity survey, carried out in 4 markets by Parrot Analytics (March 2018, n=2,000).

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# Parrot Analytics Global SVOD Subscription Survey

January–March, 2018

## United States

Understand how willing audiences are in the United States to subscribe to one or more platform and how age and gender influences their subscription preferences.

Note: The information in this section is based on a global survey carried out by Parrot Analytics in March 2018; all data in this section are based on country audience panels. Conversely, the data in the following section are not based on audience panel data.

# Willingness to pay for SVOD subscriptions in the United States

January–March, 2018

### Number of streaming subscriptions consumers are willing to pay for



### Breakdown by gender



■ Male  ■ Female

### Breakdown by age



**18–24  25–34  35–44  45–54  55–64  65+**
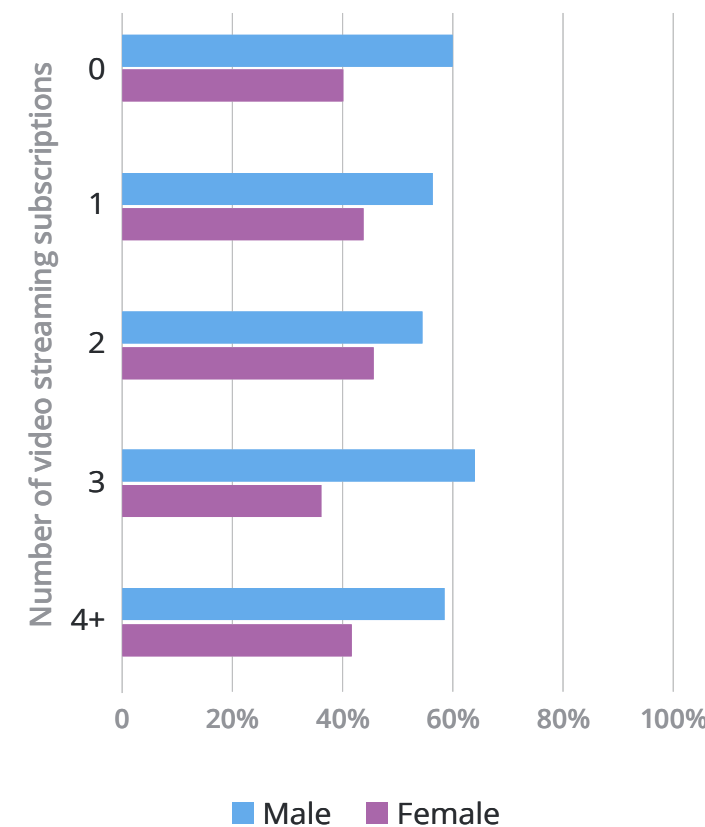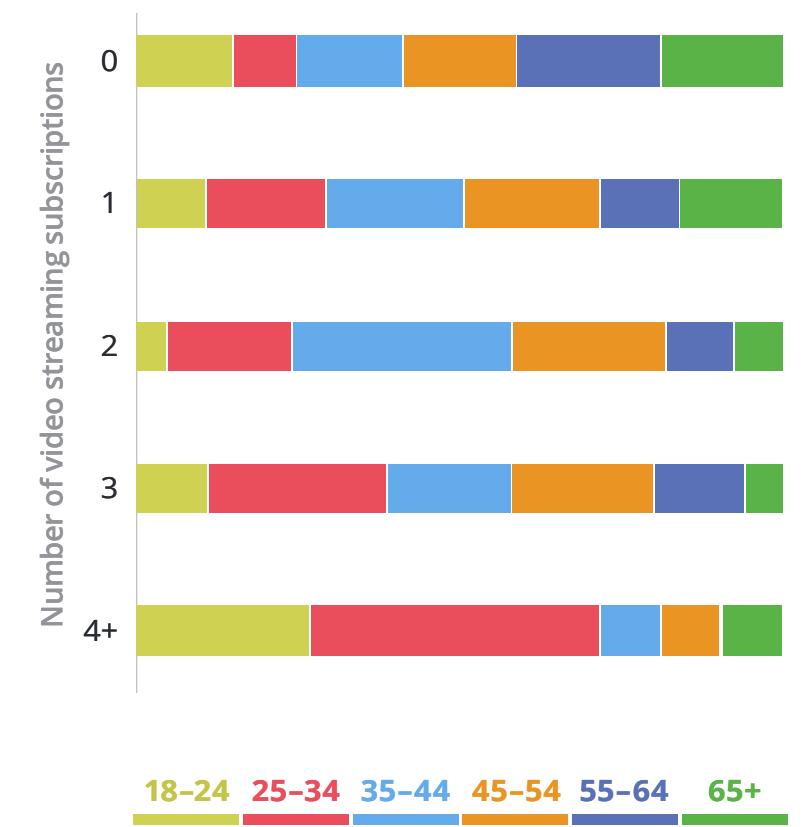
▸ In the United States, nearly half of respondents are not willing to pay for any video subscription streaming services, the most of the 4 markets examined.

▸ Based on the latest Netflix subscriber numbers, about 20% of the US population has subscribed to this SVOD service, about the same number that are willing to pay for one service (with another ~20% wiling to pay for one more).

▸ The percent of people willing to pay for 4 or more services is lowest in the US, perhaps because Netflix, Hulu, and Amazon Video are so dominant in the market. For those who are willing to pay, about 45% are between the ages of 25 and 34.

▸ Across all age groups, US males are more willing to pay for SVOD services.

| *Source:* Global SVOD subscription purchase propensity survey, carried out in 4 markets by Parrot Analytics (March 2018, n=2,000).

## Parrot Analytics Global TV Demand Data

January–March, 2018

# Global Demand for Digital Original Series by Market

For each of the ten markets, the top 20 digital original series and 5 series of interest are ranked by their average Demand Expressions from January through March, 2018. A time series plot illustrating interesting demand trends over the last three months accompanies an analysis of these trends in each market.
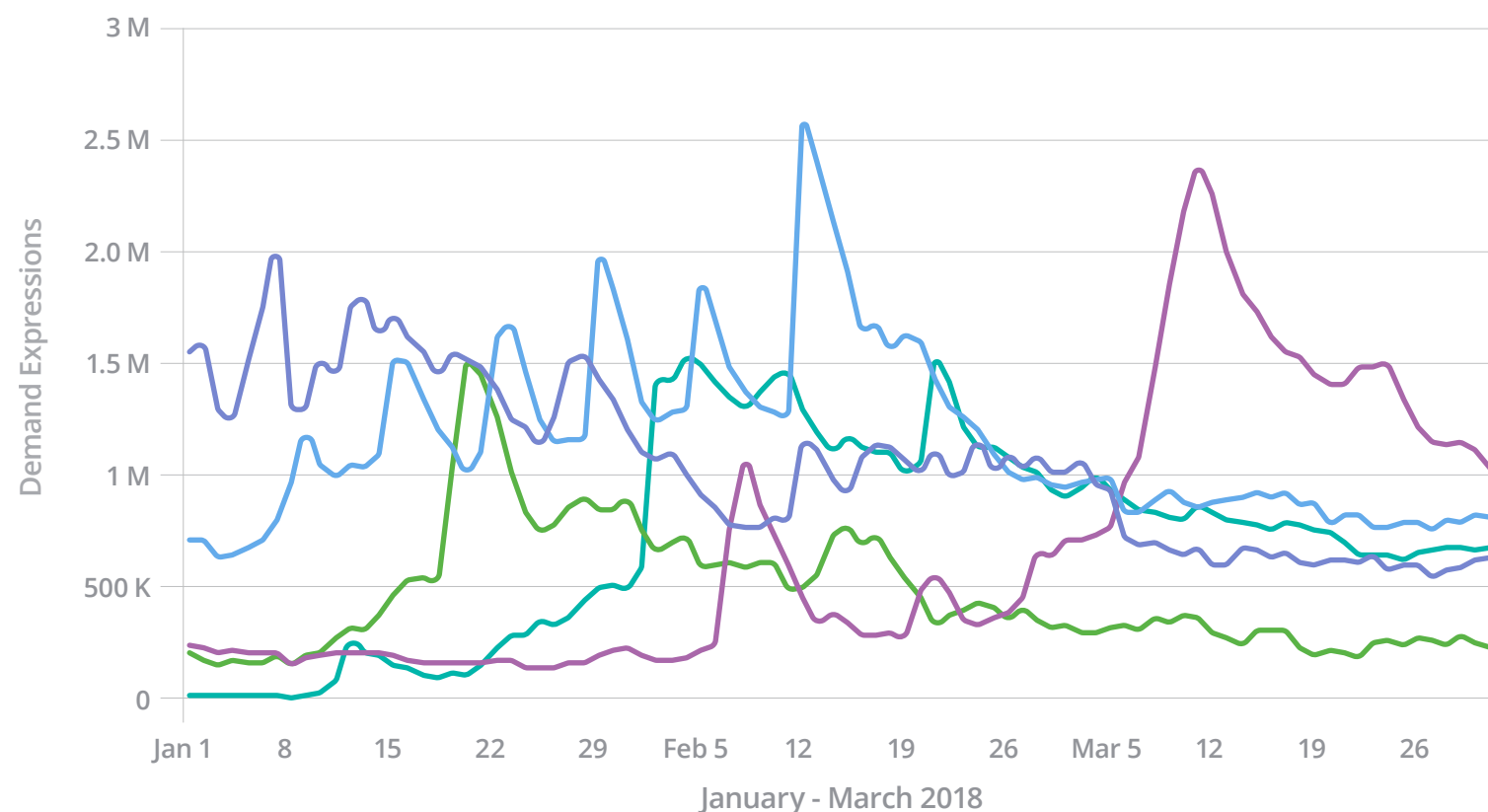
Note: Unlike the prior section, Demand Expressions measure the entire population and are not based on panel data.
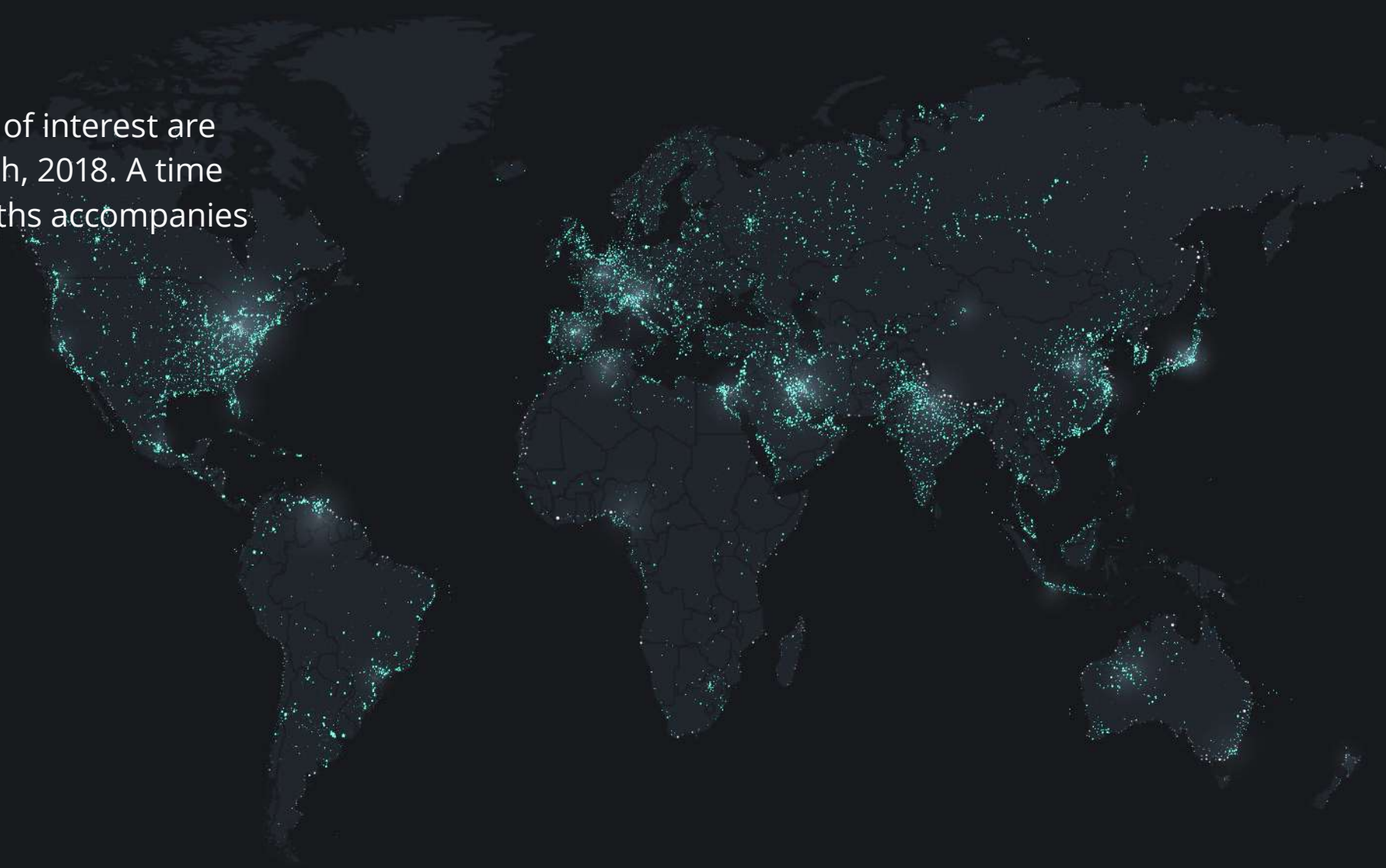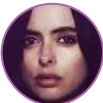
# Demand trends in Australia

### Digital Original TV Demand Trends for Australia



- Altered Carbon
- Grace And Frankie
- Marvel's Jessica Jones
- Star Trek: Discovery
- The Grand Tour



▶ While **Stranger Things** had the highest average demand this quarter, **Star Trek: Discovery** grew in demand over the second half of its first season.

▶ The second season trailer for **Jessica Jones** in February caused a demand spike that was about half the peak of the season release.

▶ Though **Grace and Frankie** and **Altered Carbon** had the same demand on their release, **Altered Carbon** maintained this high demand for the next few weeks.

▶ Stan's **Wolf Creek** ranked 38th out of all digital original series in Australia.

# Top digital original series in Australia

January–March, 2018 | Average Daily Demand Expressions

**The top 20 most in-demand digital original series:**

**Avg. Demand Expressions**

| # | Series | Platform | Genre | Avg. Demand Expressions | |
|---|--------|----------|-------|-------------------------|---|
| 1 | Stranger Things | Netflix | Science Fiction | 1,690,603 | |
| 2 | Star Trek: Discovery | Netflix | Science Fiction | 1,184,152 | |
| 3 | The Grand Tour | Amazon Video | Reality | 1,079,813 | |
| 4 | Black Mirror | Netflix | Science Fiction | 807,240 | |
| 5 | Orange Is The New Black | Netflix | Comedy Drama | 776,831 | |
| 6 | The Crown | Netflix | Drama | 750,210 | |
| 7 | Altered Carbon | Netflix | Science Fiction | 731,709 | |
| 8 | Marvel's Jessica Jones | Netflix | Drama | 692,491 | |
| 9 | Marvel's Runaways | Foxtel Now | Drama | 604,853 | |
| 10 | 13 Reasons Why | Netflix | Drama | 540,292 | |
| 11 | The Handmaid's Tale | SBS On Demand | Drama | 496,639 | |
| 12 | Grace And Frankie | Netflix | Comedy | 488,623 | |
| 13 | Stargate Origins | Stargate Command | Science Fiction | 467,849 | |
| 14 | Marvel's Daredevil | Netflix | Drama | 440,664 | |
| 15 | Marvel's The Punisher | Netflix | Drama | 426,635 | |
| 16 | Narcos | Netflix | Drama | 397,063 | |
| 17 | Dark | Netflix | Drama | 385,088 | |
| 18 | Mindhunter | Netflix | Drama | 377,304 | |
| 19 | Britannia | Foxtel Now | Drama | 340,630 | |
| 20 | Gilmore Girls | Netflix | Comedy Drama | 336,883 | |

**A selection of 5 additional digital original series of interest:**

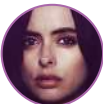| # | Series | Platform | Genre | Avg. Demand Expressions | |
|---|--------|----------|-------|-------------------------|---|
| 30 | The Good Fight | SBS | Drama | 249,121 | |
| 36 | Chance | SBS | Drama | 207,130 | |
| 38 | Wolf Creek | Stan | Horror | 204,288 | |
| 51 | Carpool Karaoke | Apple Music | Reality | 137,048 | |
| 69 | BTS: Burn The Stage | YouTube Red | Documentary | 115,063 | |

-- No platform information available, please refer to Appendix

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# Demand trends in Belgium

January–March, 2018 | Average Daily Demand Expressions

## Digital Original TV Demand Trends for Belgium
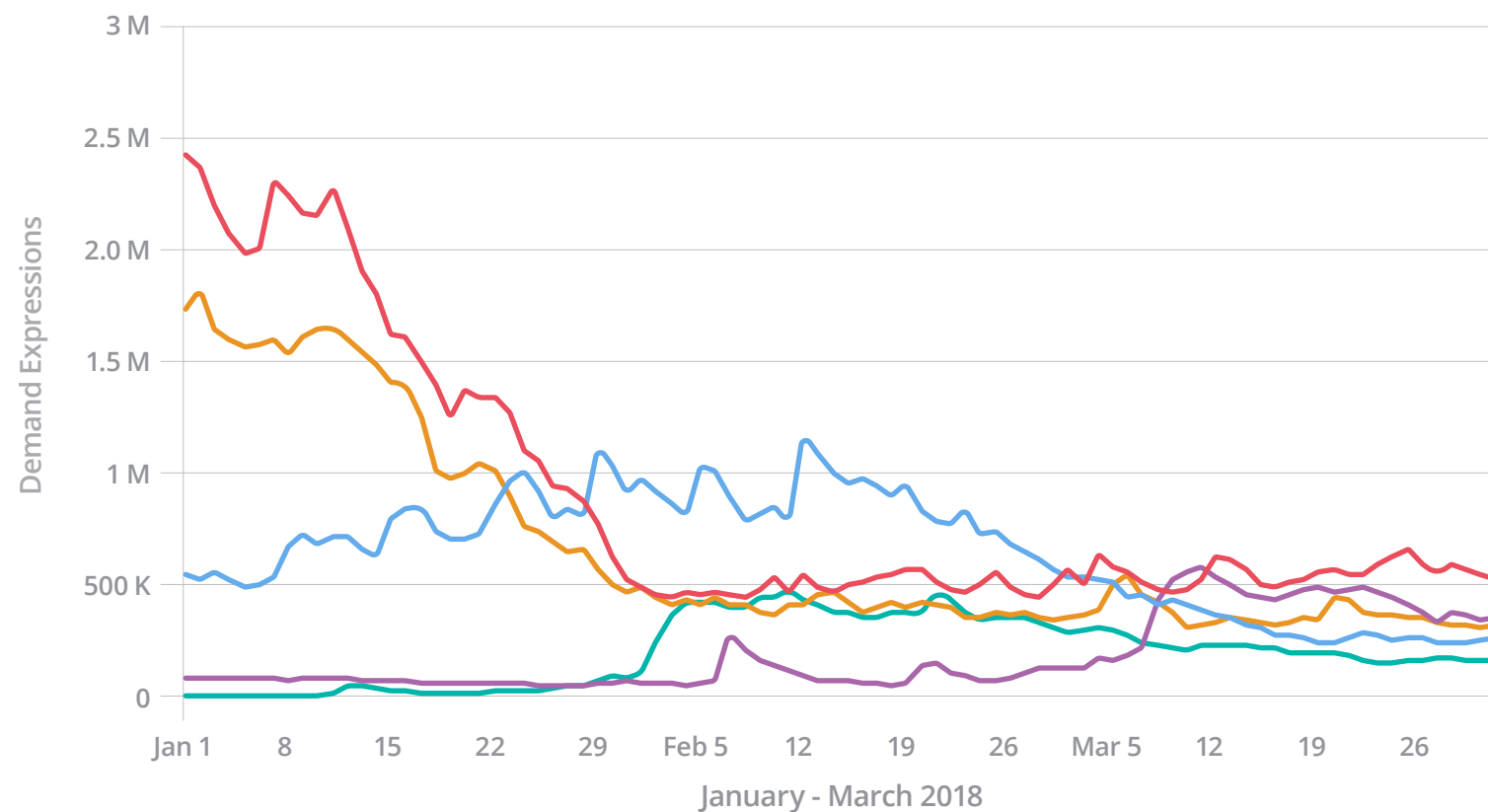


**Altered Carbon**

**Black Mirror**

**Marvel's Jessica Jones**

**Star Trek: Discovery**

**Stranger Things**

▸ The most popular digital original series, *Stranger Things* and *Black Mirror*, both declined in January from their releases in Q4 2017.

▸ Though both *Altered Carbon* and *Jessica Jones* had successful releases, with demand that was sustained over weeks, neither surpassed *Stranger Things*.

▸ The episode spikes for *Star Trek: Discovery* are not as distinct as in other markets.

▸ *La Peste*, a Spanish original series from Moviestar+, ranked highest in Belgium out of the ten markets examined in this study.

# Top digital original series in Belgium

January–March, 2018 | Average Daily Demand Expressions

**The top 20 most in-demand digital original series:**

Avg. Demand Expressions

| | | | | |
|---|---|---|---|---|
| 1 | Stranger Things | Netflix | Science Fiction | 884,275 |
| 2 | Black Mirror | Netflix | Science Fiction | 662,689 |
| 3 | Star Trek: Discovery | Netflix | Science Fiction | 638,075 |
| 4 | Orange Is The New Black | Netflix | Comedy Drama | 444,621 |
| 5 | Narcos | Netflix | Drama | 393,303 |
| 6 | The Grand Tour | Amazon Video | Reality | 325,544 |
| 7 | 13 Reasons Why | Netflix | Drama | 309,990 |
| 8 | Sense8 | Netflix | Science Fiction | 229,964 |
| 9 | The Last Kingdom | Netflix | Drama | 217,078 |
| 10 | The Crown | Netflix | Drama | 208,455 |
| 11 | Altered Carbon | Netflix | Science Fiction | 193,098 |
| 12 | Marvel's Daredevil | Netflix | Drama | 184,660 |
| 13 | Stargate Origins | -- | Science Fiction | 184,573 |
| 14 | Marvel's Jessica Jones | Netflix | Drama | 179,236 |
| 15 | Dark | Netflix | Drama | 153,037 |
| 16 | The Handmaid's Tale | -- | Drama | 135,917 |
| 17 | Marvel's Runaways | -- | Drama | 128,373 |
| 18 | House Of Cards | Netflix | Drama | 121,713 |
| 19 | Marvel's The Punisher | Netflix | Drama | 107,256 |
| 20 | 11.22.63 | -- | Drama | 91,603 |

**A selection of 5 additional digital original series of interest:**

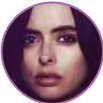| | | | | |
|---|---|---|---|---|
| 29 | Jean-Claude Van Johnson | Amazon Video | Comedy Drama | 55,532 |
| 37 | BTS: Burn The Stage | YouTube Red | Documentary | 45,113 |
| 45 | The Looming Tower | -- | Drama | 34,282 |
| 47 | Carpool Karaoke | Apple Music | Reality | 32,794 |
| 101 | La Peste | Moviestar+ | Drama | 9,343 |

-- No platform information available, please refer to Appendix

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# Demand trends in Brazil

January–March, 2018 | Average Daily Demand Expressions

**Digital Original TV Demand Trends for Brazil**
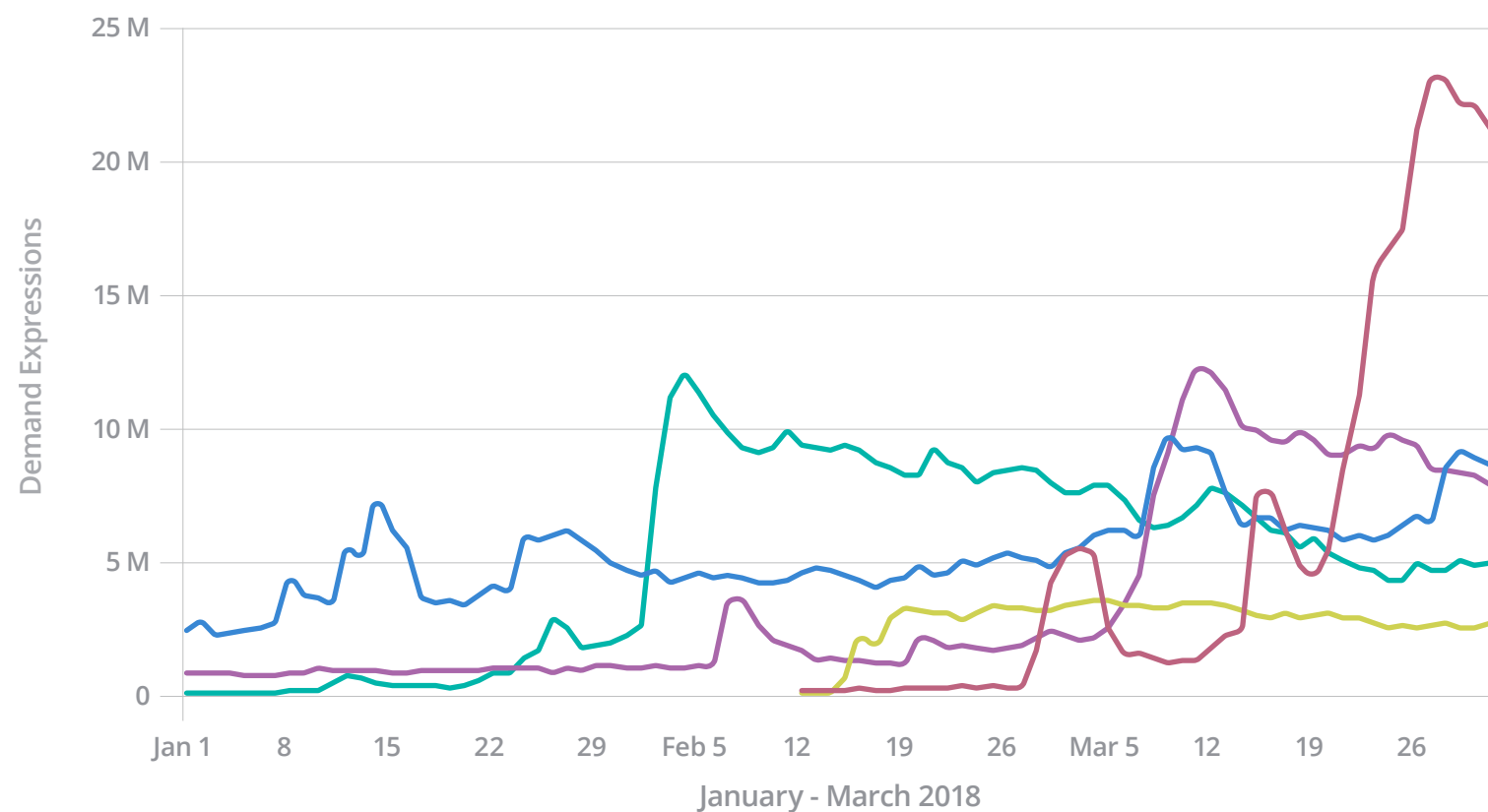


**Altered Carbon**

**Marvel's Jessica Jones**

**Stargate Origins**

**The Handmaid's Tale**

**The Mechanism**

▸ Though it was released last quarter, *Stranger Things* still had nearly 3 times more average demand than any other digital original series.

▸ The newest Brazilian Netflix show, *The Mechanism*, peaked with twice as much demand as the other popular release this quarter, *Altered Carbon*.

▸ *The Handmaid's Tale* increased in popularity over the two weeks after its wins at the Golden Globes.

▸ *Stargate Origins*, which was released on the website Stargate Command, ranked 19th in Brazil.

# Top digital original series in Brazil

January–March, 2018 | Average Daily Demand Expressions

**The top 20 most in-demand digital original series:**

Avg. Demand Expressions

| # | Title | Platform | Genre | Avg. Demand Expressions | |
|---|---|---|---|---|---|
| 1 | Stranger Things | Netflix | Science Fiction | 16,939,780 | |
| 2 | 13 Reasons Why | Netflix | Drama | 5,874,754 | |
| 3 | Orange Is The New Black | Netflix | Comedy Drama | 5,389,315 | |
| 4 | The Mechanism | Netflix | Drama | 5,199,709 | |
| 5 | Black Mirror | Netflix | Science Fiction | 5,065,163 | |
| 6 | The Handmaid's Tale | -- | Drama | 4,685,408 | |
| 7 | Altered Carbon | Netflix | Science Fiction | 4,561,809 | |
| 8 | Sense8 | Netflix | Science Fiction | 4,485,476 | |
| 9 | Star Trek: Discovery | Netflix | Science Fiction | 3,785,860 | |
| 10 | Marvel's Runaways | -- | Drama | 3,397,855 | |
| 11 | Narcos | Netflix | Drama | 3,395,929 | |
| 12 | The Last Kingdom | Netflix | Drama | 3,308,686 | |
| 13 | The Crown | Netflix | Drama | 3,171,045 | |
| 14 | Marvel's Jessica Jones | Netflix | Drama | 3,148,192 | |
| 15 | Everything Sucks! | Netflix | Comedy | 2,855,540 | |
| 16 | Britannia | -- | Drama | 2,577,956 | |
| 17 | Dark | Netflix | Drama | 2,556,877 | |
| 18 | Marvel's The Punisher | Netflix | Drama | 2,460,319 | |
| 19 | Stargate Origins | -- | Science Fiction | 2,426,439 | |
| 20 | BoJack Horseman | Netflix | Animation | 2,065,498 | |

**A selection of 5 additional digital original series of interest:**

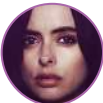| # | Title | Platform | Genre | Avg. Demand Expressions | |
|---|---|---|---|---|---|
| 35 | The Good Fight | Amazon Video | Drama | 1,154,378 | |
| 39 | Mozart In The Jungle | Amazon Video | Comedy Drama | 1,055,053 | |
| 47 | Future Man | -- | Science Fiction | 809,462 | |
| 79 | StartUp | Amazon Video | Drama | 314,179 | |
| 177 | Sin Rastro De Ti | Blim | Drama | 34,345 | |

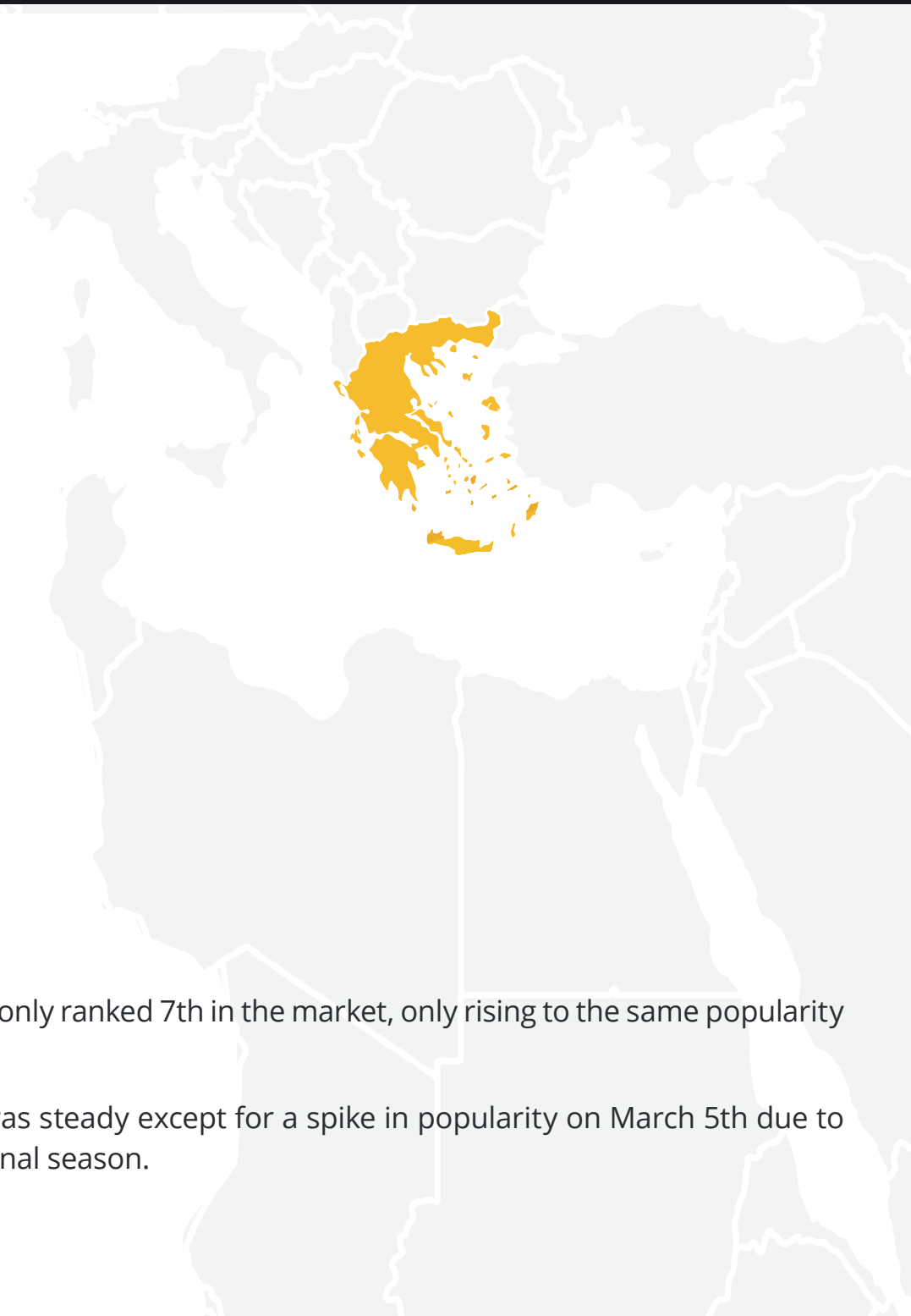-- No platform information available, please refer to Appendix

PARROT ANALYTICS

# Demand trends in Greece

January–March, 2018 | Average Daily Demand Expressions

## Digital Original TV Demand Trends for Greece
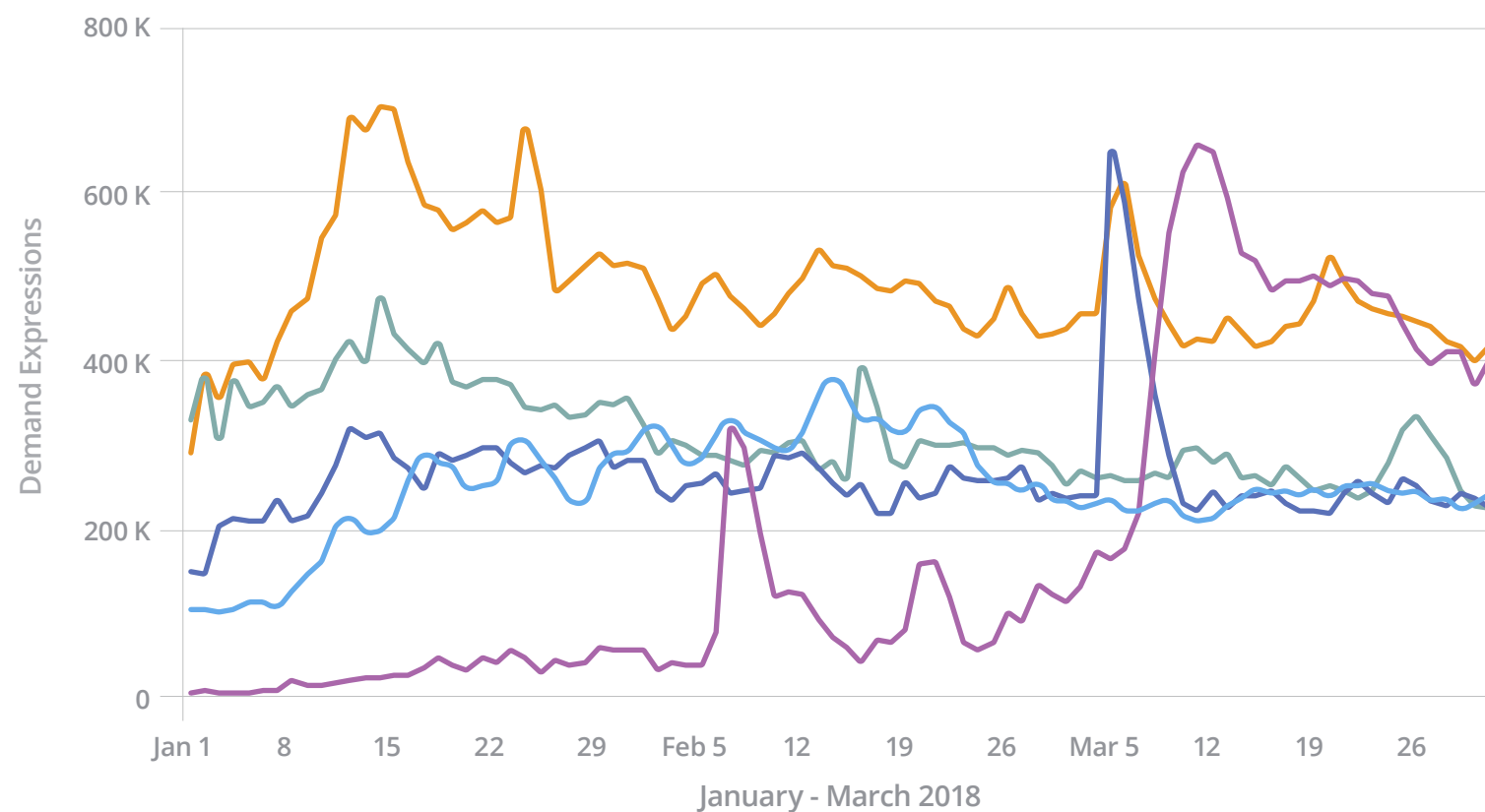


**Black Mirror**

*Dark*

*Marvel's Jessica Jones*

*Star Trek: Discovery*

*House of Cards*

▸ Though **Black Mirror** was released in late December 2017, it only rose to become one of the most popular digital original series in mid-January after the holidays.

▸ The trailer for **Jessica Jones** had more demand than **House of Cards** and its release had more demand than **Black Mirror**.

▸ In Greece, **Star Trek: Discovery** only ranked 7th in the market, only rising to the same popularity as Netflix's **Dark**.

▸ Demand for **House of Cards** was steady except for a spike in popularity on March 5th due to the release of a trailer for its final season.

# Top digital original series in Greece

January – March, 2018 | Average Daily Demand Expressions

**The top 20 most in-demand digital original series:**

Avg. Demand Expressions

| # | Series | Platform | Genre | Avg. Demand Expressions |
|---|--------|----------|-------|------------------------|
| 1 | Stranger Things | Netflix | Science Fiction | 761,054 |
| 2 | Black Mirror | Netflix | Science Fiction | 500,113 |
| 3 | Dark | Netflix | Drama | 324,950 |
| 4 | Narcos | Netflix | Drama | 321,358 |
| 5 | 13 Reasons Why | Netflix | Drama | 284,794 |
| 6 | House Of Cards | Netflix | Drama | 275,753 |
| 7 | Star Trek: Discovery | Netflix | Science Fiction | 262,309 |
| 8 | Marvel's The Punisher | Netflix | Drama | 253,824 |
| 9 | Orange Is The New Black | Netflix | Comedy Drama | 250,700 |
| 10 | The Grand Tour | Amazon Video | Reality | 240,876 |
| 11 | Mindhunter | Netflix | Drama | 228,748 |
| 12 | Marvel's Daredevil | Netflix | Drama | 212,475 |
| 13 | Sense8 | Netflix | Science Fiction | 211,077 |
| 14 | The Crown | Netflix | Drama | 201,445 |
| 15 | Marvel's Jessica Jones | Netflix | Drama | 197,534 |
| 16 | Altered Carbon | Netflix | Science Fiction | 167,961 |
| 17 | BoJack Horseman | Netflix | Animation | 122,556 |
| 18 | The Man In The High Castle | Amazon Video | Drama | 114,899 |
| 19 | The Last Kingdom | Netflix | Drama | 114,368 |
| 20 | Ozark | Netflix | Drama | 108,381 |

**A selection of 5 additional digital original series of interest:**

| # | Series | Platform | Genre | Avg. Demand Expressions |
|---|--------|----------|-------|------------------------|
| 27 | BTS: Burn The Stage | YouTube Red | Documentary | 69,263 |
| 28 | Mozart In The Jungle | Amazon Video | Comedy Drama | 68,325 |
| 29 | Future Man | -- | Science Fiction | 67,915 |
| 56 | StartUp | -- | Drama | 30,481 |
| 75 | Mind Field | YouTube Red | Reality | 17,151 |
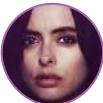
-- No platform information available, please refer to Appendix

*Demand Expressions®: The total audience demand being expressed for a title, within a country, on any platform.*

PARROT ANALYTICS

# Demand trends in Italy

### Digital Original TV Demand Trends for Italy
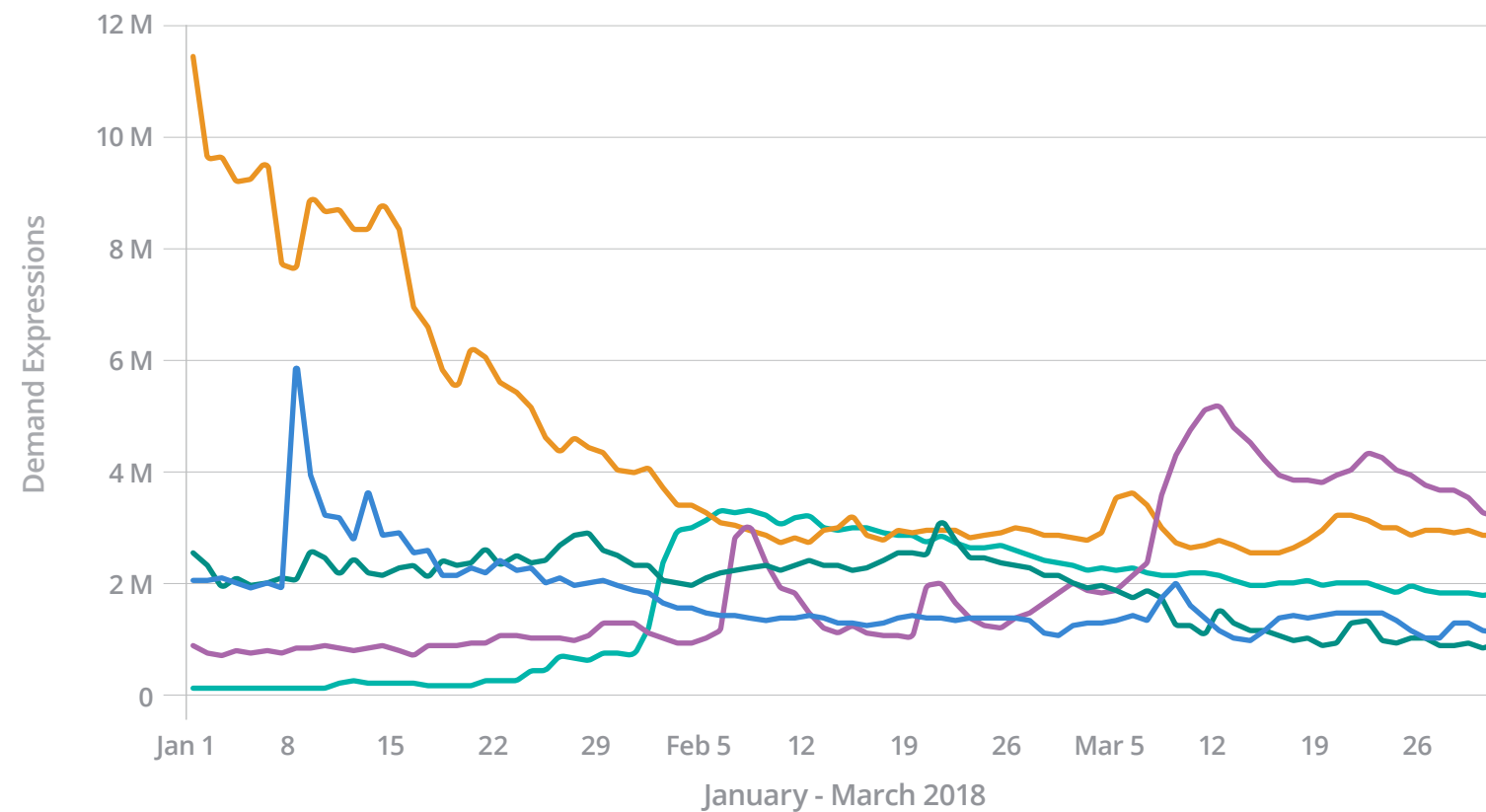


**Altered Carbon**

**Black Mirror**

**Marvel's Jessica Jones**

**Suburra**

**The Handmaid's Tale**

▸ After *Stranger Things*, *Black Mirror* had the second-highest demand for digital original series even though its demand declined over the entire quarter.

▸ The popularity for *The Handmaid's Tale* spiked after its wins at the Golden Globes.

▸ The Italian Netflix series *Suburra* ranked 7th though it was released in October. There was a slight bump in its demand at the end of January when it was renewed.

▸ *Altered Carbon* only surpassed *Black Mirror* for a few days after its premiere, but *Jessica Jones* was still more popular than both at the end of the quarter.

# Top digital original series in Italy

January–March, 2018 | Average Daily Demand Expressions

**The top 20 most in-demand digital original series:**

Avg. Demand Expressions

| # | Series | Platform | Genre | Avg. Demand Expressions |
|---|--------|----------|-------|------------------------|
| 1 | Stranger Things | Netflix | Science Fiction | 4,390,138 |
| 2 | Black Mirror | Netflix | Science Fiction | 4,251,382 |
| 3 | Narcos | Netflix | Drama | 3,087,906 |
| 4 | Star Trek: Discovery | Netflix | Science Fiction | 2,806,637 |
| 5 | Orange Is The New Black | Netflix | Comedy Drama | 2,053,475 |
| 6 | Marvel's Jessica Jones | Netflix | Drama | 1,888,694 |
| 7 | Suburra | Netflix | Drama | 1,854,633 |
| 8 | 13 Reasons Why | Netflix | Drama | 1,677,945 |
| 9 | Sense8 | Netflix | Science Fiction | 1,656,702 |
| 10 | The Handmaid's Tale | TIMvision | Drama | 1,624,938 |
| 11 | The Grand Tour | Amazon Video | Reality | 1,620,261 |
| 12 | Britannia | Sky Go/Now TV | Drama | 1,580,987 |
| 13 | Altered Carbon | Netflix | Science Fiction | 1,560,954 |
| 14 | The Crown | Netflix | Drama | 1,466,692 |
| 15 | Dark | Netflix | Drama | 1,434,127 |
| 16 | Marvel's Daredevil | Netflix | Drama | 1,193,444 |
| 17 | BoJack Horseman | Netflix | Animation | 1,112,762 |
| 18 | House Of Cards | Netflix | Drama | 1,100,877 |
| 19 | Mindhunter | Netflix | Drama | 835,491 |
| 20 | Gilmore Girls | Netflix | Comedy Drama | 783,402 |

**A selection of 5 additional digital original series of interest:**

| # | Series | Platform | Genre | Avg. Demand Expressions |
|---|--------|----------|-------|------------------------|
| 32 | Bosch | Amazon Video | Drama | 458,752 |
| 40 | The Mindy Project | -- | Comedy | 393,583 |
| 42 | Snatch | TIMvision | Comedy Drama | 374,712 |
| 48 | The Good Fight | TIMvision | Drama | 306,061 |
| 58 | BTS: Burn The Stage | YouTube Red | Documentary | 238,342 |

-- No platform information available, please refer to Appendix

PARROT ANALYTICS

# Demand trends in the Netherlands

January–March, 2018 | Average Daily Demand Expressions

## Digital Original TV Demand Trends for the Netherlands
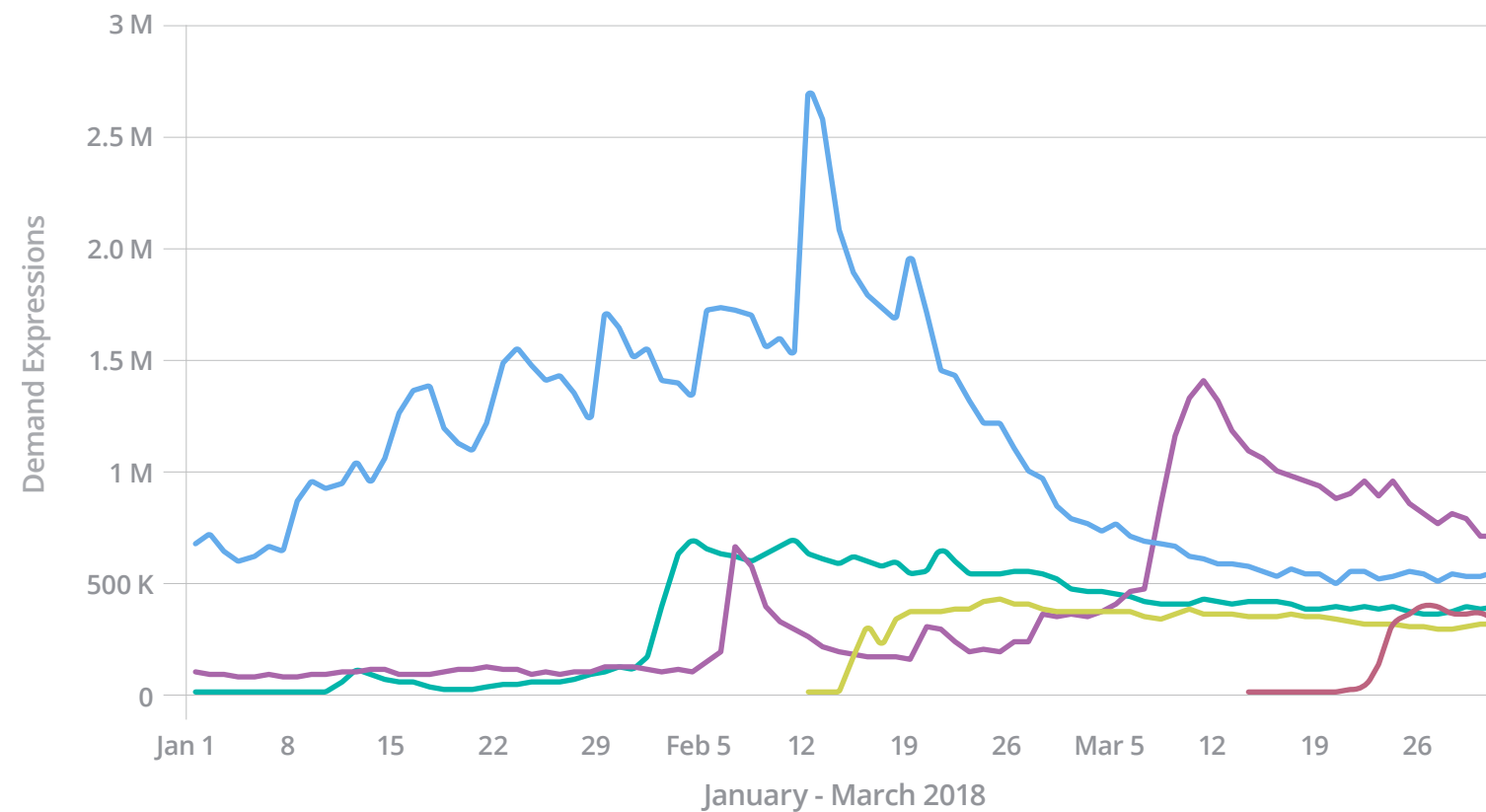


**Altered Carbon**

**Stargate Origins**

**Marvel's Jessica Jones**

**Star Trek: Discovery**

**The Mechanism**
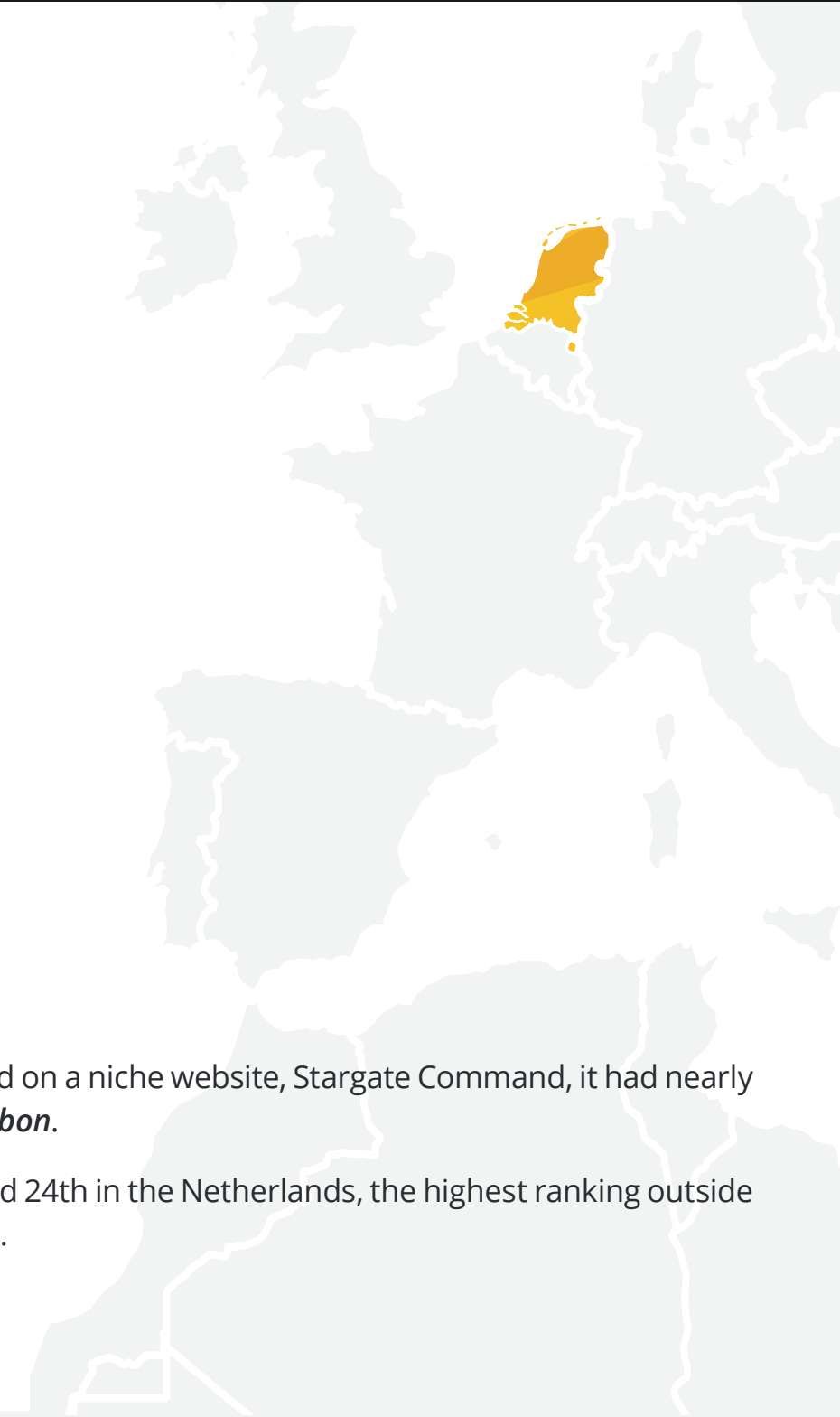
▸ *Star Trek: Discovery* was the second-most popular digital original series with a spike in demand for each episode and the weekend after the finale.

▸ The trailer for *Jessica Jones'* second season had more demand than *Altered Carbon*, and it was the most popular digital original series after its release.

▸ Even though *Stargate Origins* was released on a niche website, Stargate Command, it had nearly as much demand as Netflix's *Altered Carbon*.

▸ The Brazilian series *The Mechanism* ranked 24th in the Netherlands, the highest ranking outside of its home market in this set of markets.

*Demand Expressions®: The total audience demand being expressed for a title, within a country, on any platform.*

# Top digital original series in the Netherlands

January–March, 2018 | Average Daily Demand Expressions

**The top 20 most in-demand digital original series:**

Avg. Demand Expressions

| # | Title | Platform | Genre | Avg. Demand Expressions |
|---|---|---|---|---|
| 1 | Stranger Things | Netflix | Science Fiction | 1,112,862 |
| 2 | Star Trek: Discovery | Netflix | Science Fiction | 1,082,567 |
| 3 | Black Mirror | Netflix | Science Fiction | 975,535 |
| 4 | The Grand Tour | Amazon Video | Reality | 835,912 |
| 5 | The Crown | Netflix | Drama | 462,495 |
| 6 | Orange Is The New Black | Netflix | Comedy Drama | 433,223 |
| 7 | Narcos | Netflix | Drama | 386,985 |
| 8 | Marvel's Jessica Jones | Netflix | Drama | 385,606 |
| 9 | Altered Carbon | Netflix | Science Fiction | 323,415 |
| 10 | Stargate Origins | -- | Science Fiction | 310,575 |
| 11 | House Of Cards | Netflix | Drama | 306,602 |
| 12 | 13 Reasons Why | Netflix | Drama | 297,990 |
| 13 | The Handmaid's Tale | -- | Drama | 277,314 |
| 14 | Marvel's Runaways | -- | Drama | 258,835 |
| 15 | Marvel's The Punisher | Netflix | Drama | 255,124 |
| 16 | Dark | Netflix | Drama | 252,636 |
| 17 | Marvel's Daredevil | Netflix | Drama | 236,133 |
| 18 | Grace And Frankie | Netflix | Comedy | 199,002 |
| 19 | Sense8 | Netflix | Science Fiction | 188,186 |
| 20 | Mindhunter | Netflix | Drama | 187,944 |

**A selection of 5 additional digital original series of interest:**

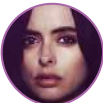| # | Title | Platform | Genre | Avg. Demand Expressions |
|---|---|---|---|---|
| 30 | The Good Fight | -- | Drama | 125,500 |
| 31 | The Path | -- | Drama | 122,491 |
| 32 | BTS: Burn The Stage | YouTube Red | Documentary | 117,450 |
| 38 | Sneaky Pete | Amazon Video | Drama | 105,140 |
| 77 | Mind Field | YouTube Red | Reality | 46,982 |

-- No platform information available, please refer to Appendix

*Demand Expressions®: The total audience demand being expressed for a title, within a country, on any platform.*

PARROT ANALYTICS
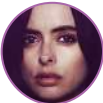
# Demand trends in South Korea

January – March, 2018 | Average Daily Demand Expressions

## Digital Original TV Demand Trends for South Korea
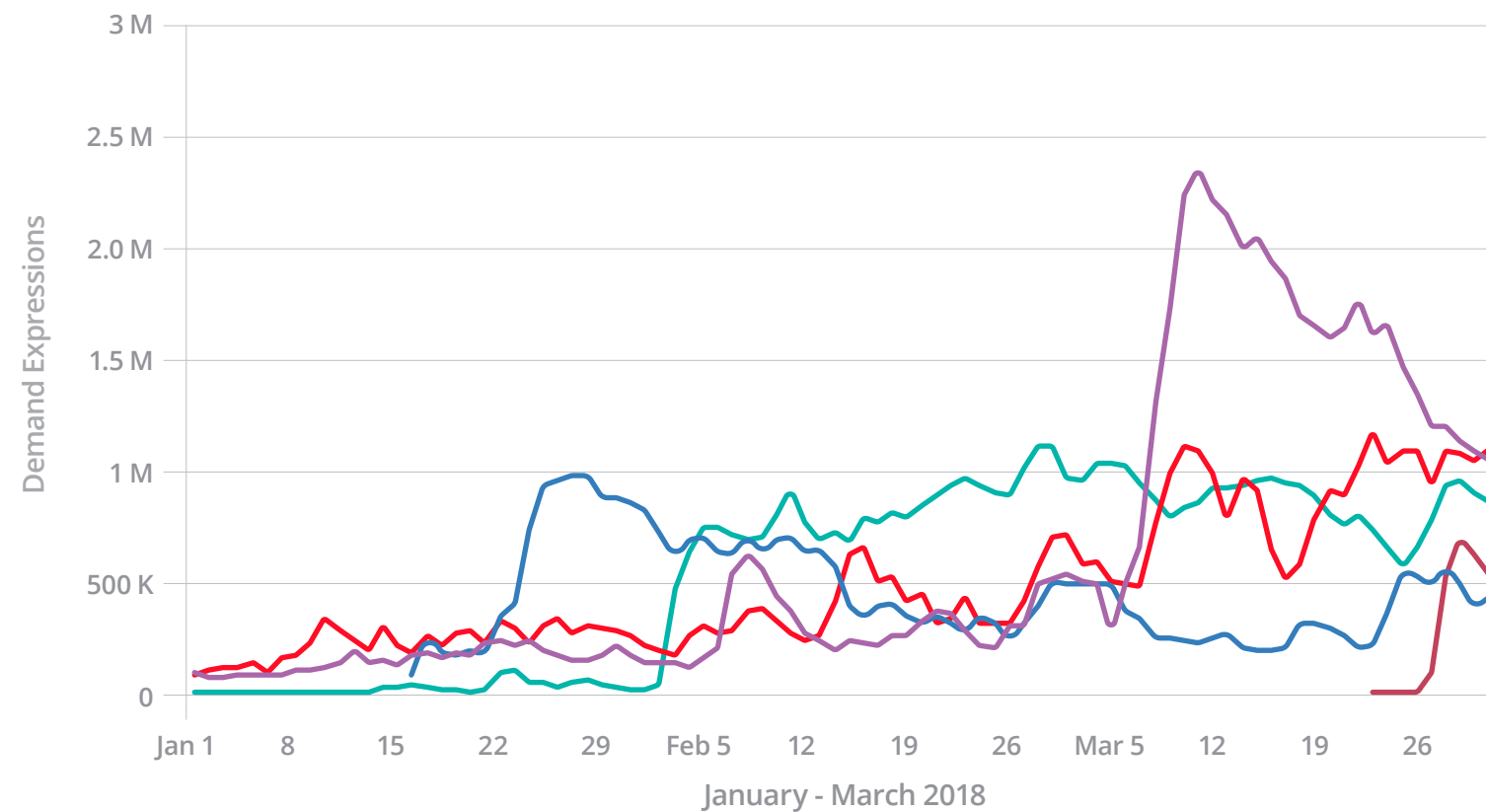


**Altered Carbon**

**BTS: Burn The Stage**

**Marvel's Jessica Jones**

**Marvel's Daredevil**

**Devilman Crybaby**

▶ Of the top 6 most popular digital original series, 3 of them are Marvel series: *Jessica Jones, Runaways,* and *The Punisher.*

▶ The demand for *Daredevil* also increased after *Jessica Jones'* release, indicating Marvel shows influence each other's popularity.

▶ The premiere of the anime series *Devilman Crybaby* had more demand than *Altered Carbon*, but *Altered Carbon* maintained its demand better.

▶ The YouTube Red documentary *BTS: Burn the Stage*, about a popular K-pop group, ranked 21st in South Korea even though it only premiered in late March.

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# Top digital original series in South Korea

January–March, 2018 | Average Daily Demand Expressions

**The top 20 most in-demand digital original series:**

Avg. Demand Expressions

| # | Series | Platform | Genre | Avg. Demand Expressions |
|---|--------|----------|-------|------------------------|
| 1 | Stranger Things | Netflix | Science Fiction | 2,254,102 |
| 2 | Black Mirror | Netflix | Science Fiction | 1,161,727 |
| 3 | Orange Is The New Black | Netflix | Comedy Drama | 648,012 |
| 4 | Marvel's Jessica Jones | Netflix | Drama | 628,643 |
| 5 | Marvel's Runaways | -- | Drama | 615,371 |
| 6 | Marvel's The Punisher | Netflix | Drama | 587,073 |
| 7 | House Of Cards | Netflix | Drama | 572,635 |
| 8 | Sense8 | Netflix | Science Fiction | 564,434 |
| 9 | The Grand Tour | Amazon Video | Reality | 559,193 |
| 10 | Stargate Origins | -- | Science Fiction | 557,767 |
| 11 | Altered Carbon | Netflix | Science Fiction | 547,920 |
| 12 | Star Trek: Discovery | Netflix | Science Fiction | 525,807 |
| 13 | Narcos | Netflix | Drama | 514,545 |
| 14 | Mindhunter | Netflix | Drama | 491,754 |
| 15 | Marvel's Daredevil | Netflix | Drama | 488,648 |
| 16 | Devilman Crybaby | Netflix | Anime | 453,575 |
| 17 | 13 Reasons Why | Netflix | Drama | 386,161 |
| 18 | Britannia | -- | Drama | 364,577 |
| 19 | The Looming Tower | Amazon Video | Drama | 337,067 |
| 20 | Marvel's The Defenders | Netflix | Drama | 310,742 |

**A selection of 5 additional digital original series of interest:**

| # | Series | Platform | Genre | Avg. Demand Expressions |
|---|--------|----------|-------|------------------------|
| 31 | Long Strange Trip | Amazon Video | Documentary | 161,676 |
| 33 | The Good Fight | Amazon Video | Drama | 158,986 |
| 37 | The Path | -- | Drama | 150,583 |
| 49 | StartUp | Amazon Video | Drama | 109,728 |
| 115 | Run, BIGBANG Scout! | YouTube Red | Reality | 23,760 |

-- No platform information available, please refer to Appendix

PARROT ANALYTICS
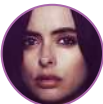
# Demand trends in Switzerland

January–March, 2018 | Average Daily Demand Expressions

## Digital Original TV Demand Trends for Switzerland
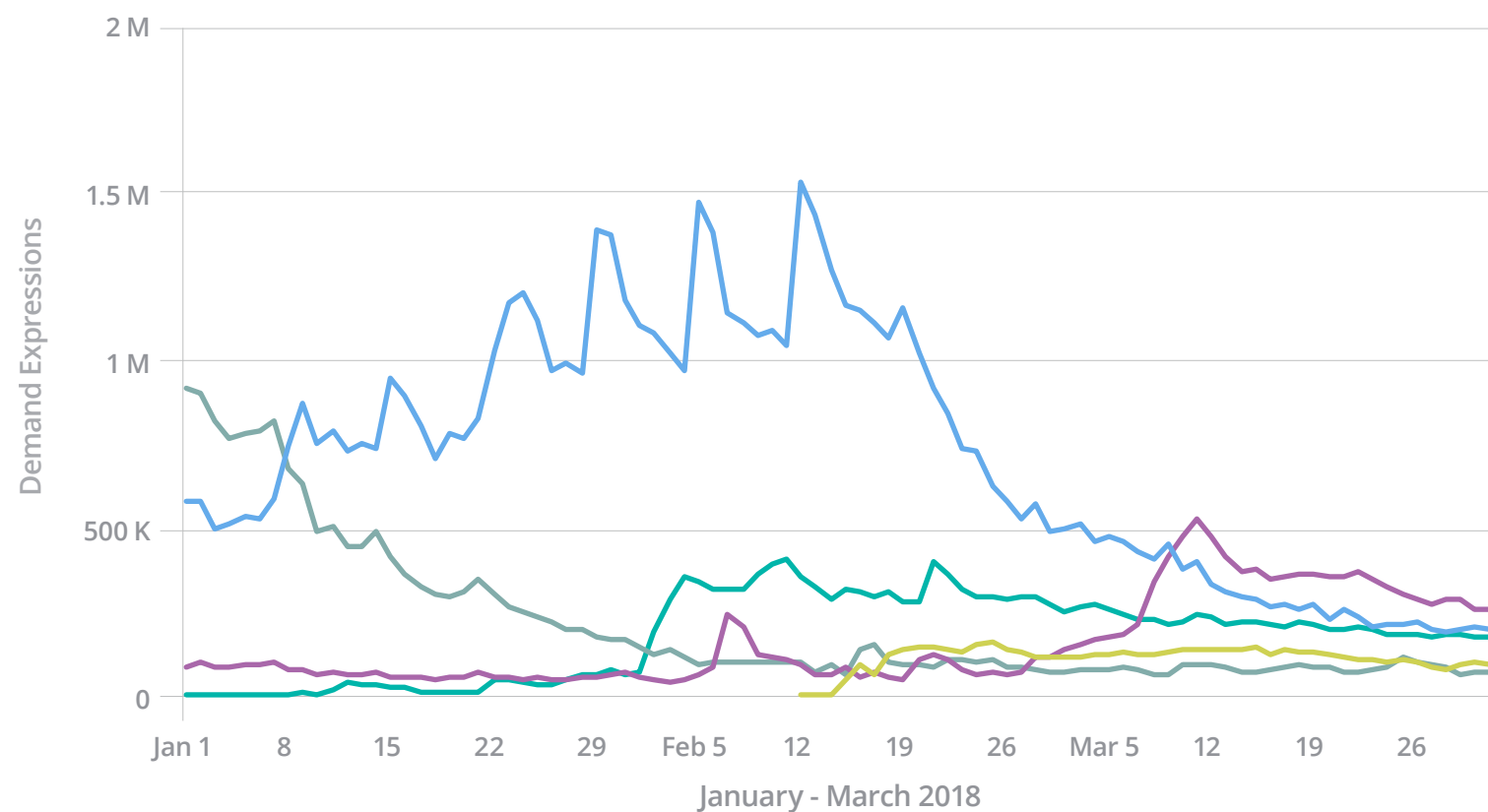


**Altered Carbon**

*Dark*

*Marvel's Jessica Jones*

*Star Trek: Discovery*

*Stargate Origins*

▸ **Star Trek: Discovery** was the most popular digital original title in Switzerland due to its growing popularity during the second half of its first season.

▸ Netflix's German-language series **Dark** began the quarter with more demand than **Star Trek: Discovery**.

▸ Three major releases this quarter– **Altered Carbon**, **Jessica Jones**, and **Stargate Origins**– all sustained their initial demand over several weeks.

▸ The latest season of the German sitcom **Pastewka** aired on Amazon Video and ranked 42nd in the market.

# Top digital original series in Switzerland

January–March, 2018 | Average Daily Demand Expressions

**The top 20 most in-demand digital original series:**

Avg. Demand Expressions

| # | Series | Platform | Genre | Avg. Demand Expressions |
|---|--------|----------|-------|------------------------|
| 1 | Star Trek: Discovery | Netflix | Science Fiction | 720,239 |
| 2 | Stranger Things | Netflix | Science Fiction | 573,874 |
| 3 | Black Mirror | Netflix | Science Fiction | 444,973 |
| 4 | The Grand Tour | Amazon Video | Reality | 281,572 |
| 5 | Narcos | Netflix | Drama | 272,651 |
| 6 | Orange Is The New Black | Netflix | Comedy Drama | 221,450 |
| 7 | Dark | Netflix | Drama | 210,785 |
| 8 | Altered Carbon | Netflix | Science Fiction | 175,169 |
| 9 | Sense8 | Netflix | Science Fiction | 155,192 |
| 10 | Marvel's Jessica Jones | Netflix | Drama | 153,228 |
| 11 | The Crown | Netflix | Drama | 142,031 |
| 12 | House Of Cards | Netflix | Drama | 125,031 |
| 13 | Marvel's Daredevil | Netflix | Drama | 115,679 |
| 14 | 13 Reasons Why | Netflix | Drama | 108,790 |
| 15 | Stargate Origins | -- | Science Fiction | 107,643 |
| 16 | Marvel's Runaways | -- | Drama | 100,760 |
| 17 | Marvel's The Punisher | Netflix | Drama | 96,837 |
| 18 | Mindhunter | Netflix | Drama | 87,135 |
| 19 | 11.22.63 | -- | Drama | 83,668 |
| 20 | The Man In The High Castle | Amazon Video | Drama | 83,595 |

**A selection of 5 additional digital original series of interest:**

| # | Series | Platform | Genre | Avg. Demand Expressions |
|---|--------|----------|-------|------------------------|
| 26 | Britannia | -- | Drama | 46,433 |
| 27 | The Path | Amazon Video | Drama | 44,223 |
| 42 | Pastewka | Amazon Video | Comedy | 30,553 |
| 43 | BTS: Burn The Stage | YouTube Red | Documentary | 29,840 |
| 59 | Carpool Karaoke | Apple Music | Reality | 23,306 |
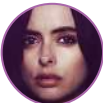
-- No platform information available, please refer to Appendix

PARROT ANALYTICS

# Demand trends in the United Kingdom

**Digital Original TV Demand Trends for the United Kingdom**
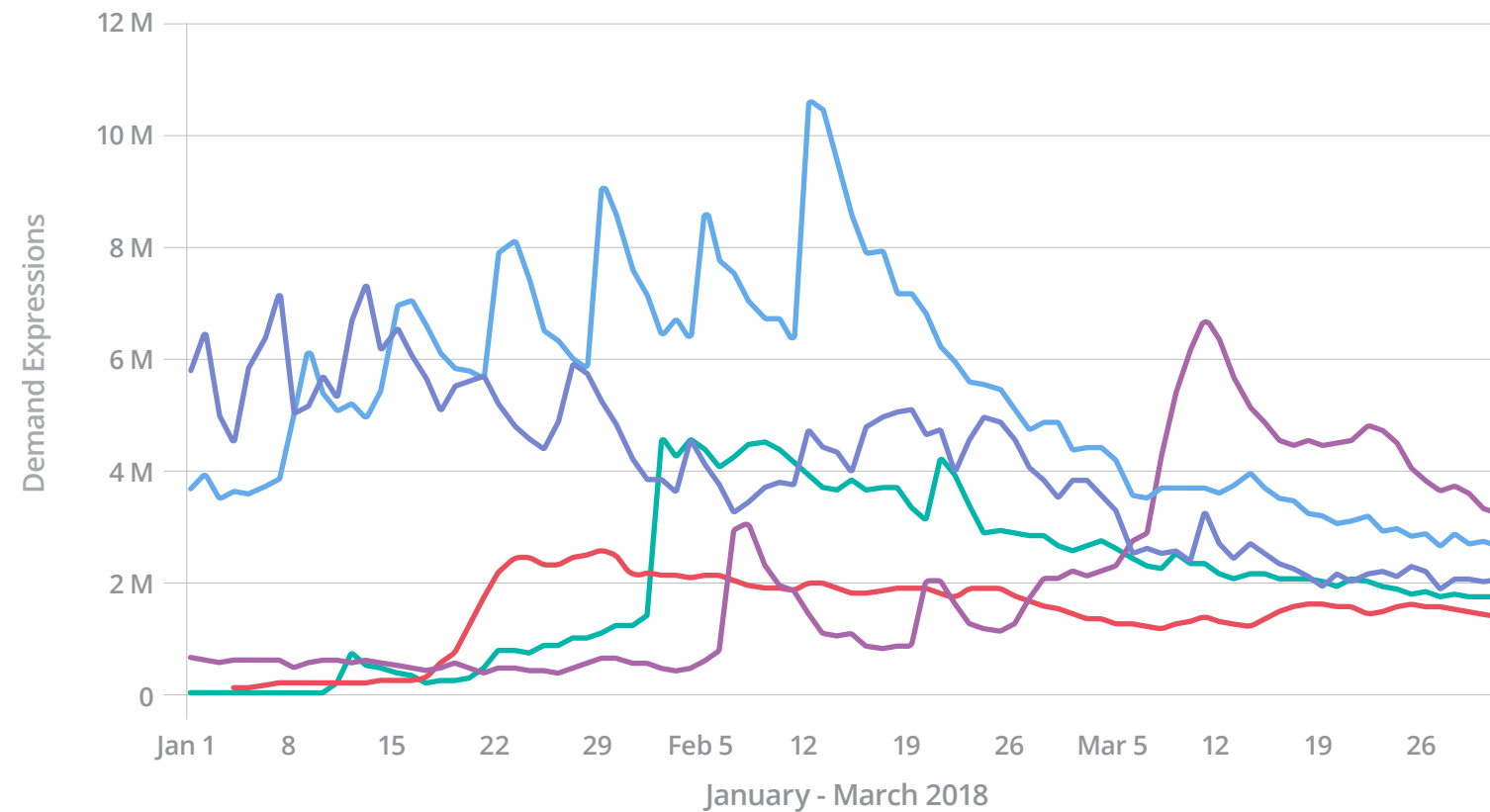


- **Altered Carbon**
- **Britannia**
- **Marvel's Jessica Jones**
- **Star Trek: Discovery**
- **The Grand Tour**

- ▸ **Star Trek: Discovery** was the most in-demand digital original series in the UK due to the popularity of the second half of its season.

- ▸ **The Grand Tour** was the third-most popular digital original series in the UK, and did not decline in popularity too much after its second season ended in February.

- ▸ The recent co-production between Amazon and Sky, **Britannia**, rose to a reasonably high level of demand after its premiere, making it rank 12th in the market.

- ▸ The trailer for **Jessica Jones'** second season had about 60% of the popularity of **Altered Carbon's** release a week earlier.

| *Demand Expressions®: The total audience demand being expressed for a title, within a country, on any platform.*

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# Top digital original series in the United Kingdom

January–March, 2018 | Average Daily Demand Expressions

**The top 20 most in-demand digital original series:**

Avg. Demand Expressions

| # | Series | Platform | Genre | Avg. Demand Expressions |
|---|--------|----------|-------|------------------------|
| 1 | Star Trek: Discovery | Netflix | Science Fiction | 5,459,886 |
| 2 | Stranger Things | Netflix | Science Fiction | 4,987,972 |
| 3 | The Grand Tour | Amazon Video | Reality | 4,180,302 |
| 4 | Black Mirror | Netflix | Science Fiction | 2,913,830 |
| 5 | The Crown | Netflix | Drama | 2,557,481 |
| 6 | Altered Carbon | Netflix | Science Fiction | 2,113,922 |
| 7 | Marvel's Jessica Jones | Netflix | Drama | 2,093,556 |
| 8 | Orange Is The New Black | Netflix | Comedy Drama | 2,060,572 |
| 9 | Narcos | Netflix | Drama | 1,677,643 |
| 10 | Marvel's Runaways | Syfy | Drama | 1,676,745 |
| 11 | Marvel's Daredevil | Netflix | Drama | 1,563,630 |
| 12 | Britannia | Sky Atlantic | Drama | 1,549,864 |
| 13 | 13 Reasons Why | Netflix | Drama | 1,430,814 |
| 14 | Marvel's The Punisher | Netflix | Drama | 1,409,005 |
| 15 | The Handmaid's Tale | Channel 4 | Drama | 1,266,700 |
| 16 | Mindhunter | Netflix | Drama | 1,258,882 |
| 17 | Dark | Netflix | Drama | 1,254,395 |
| 18 | Stargate Origins | Stargate Command | Science Fiction | 1,243,376 |
| 19 | House Of Cards | Netflix | Drama | 1,124,521 |
| 20 | The Man In The High Castle | Amazon Video | Drama | 1,012,976 |

**A selection of 5 additional digital original series of interest:**

| # | Series | Platform | Genre | Avg. Demand Expressions |
|---|--------|----------|-------|------------------------|
| 28 | The Good Fight | Amazon Video | Drama | 736,877 |
| 29 | Sneaky Pete | Amazon Video | Drama | 732,216 |
| 35 | Future Man | -- | Science Fiction | 607,933 |
| 41 | Carpool Karaoke | Apple Music | Reality | 507,026 |
| 46 | Comeback Kids: Animal Edition | Facebook Watch | Reality | 479,740 |

-- No platform information available, please refer to Appendix

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# Demand trends in the United States

January–March, 2018 | Average Daily Demand Expressions

### Digital Original TV Demand Trends for the United States
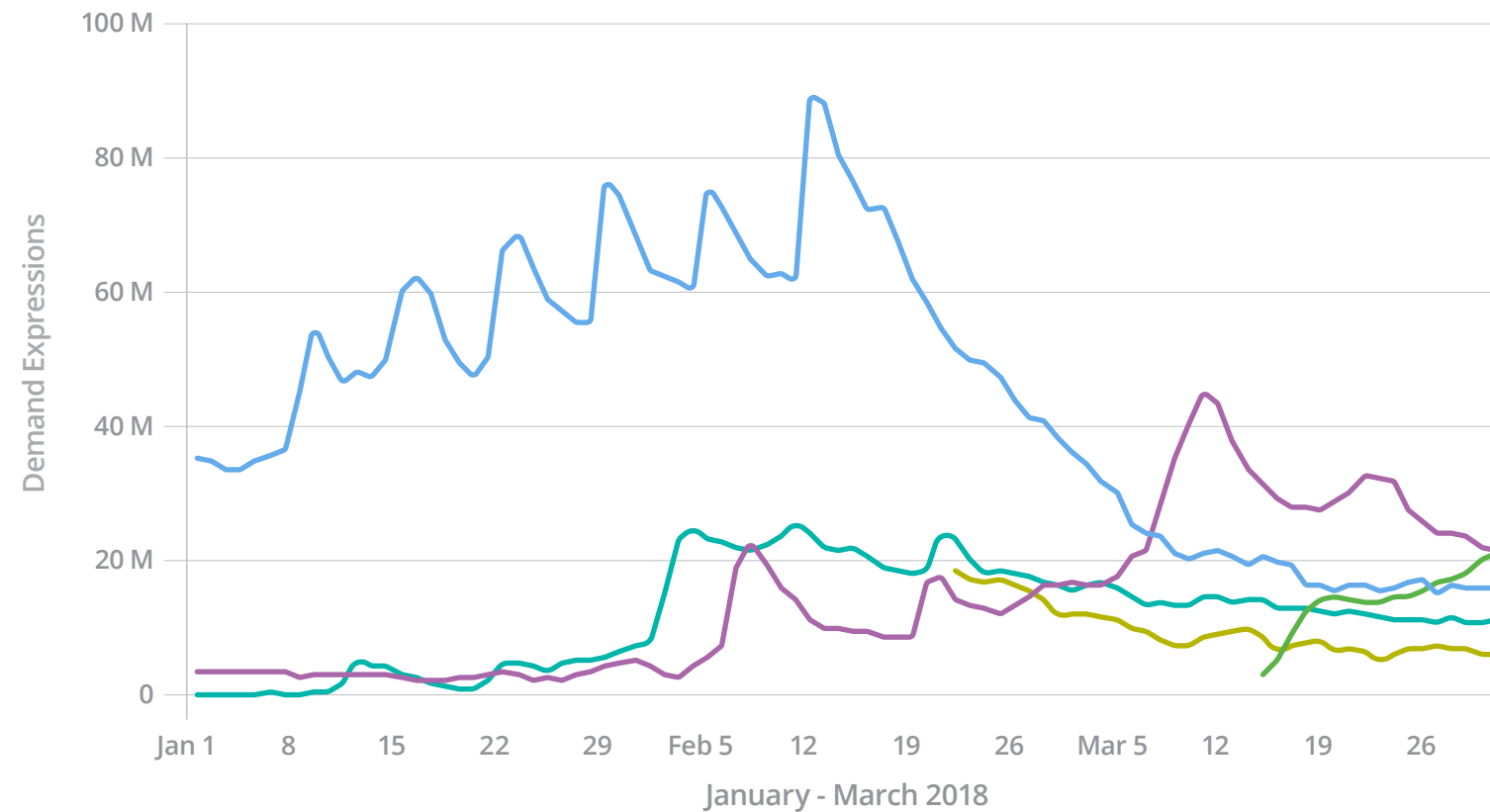


- **Altered Carbon**
- **Everything Sucks**
- **Marvel's Jessica Jones**
- **Star Trek: Discovery**
- **On My Block**
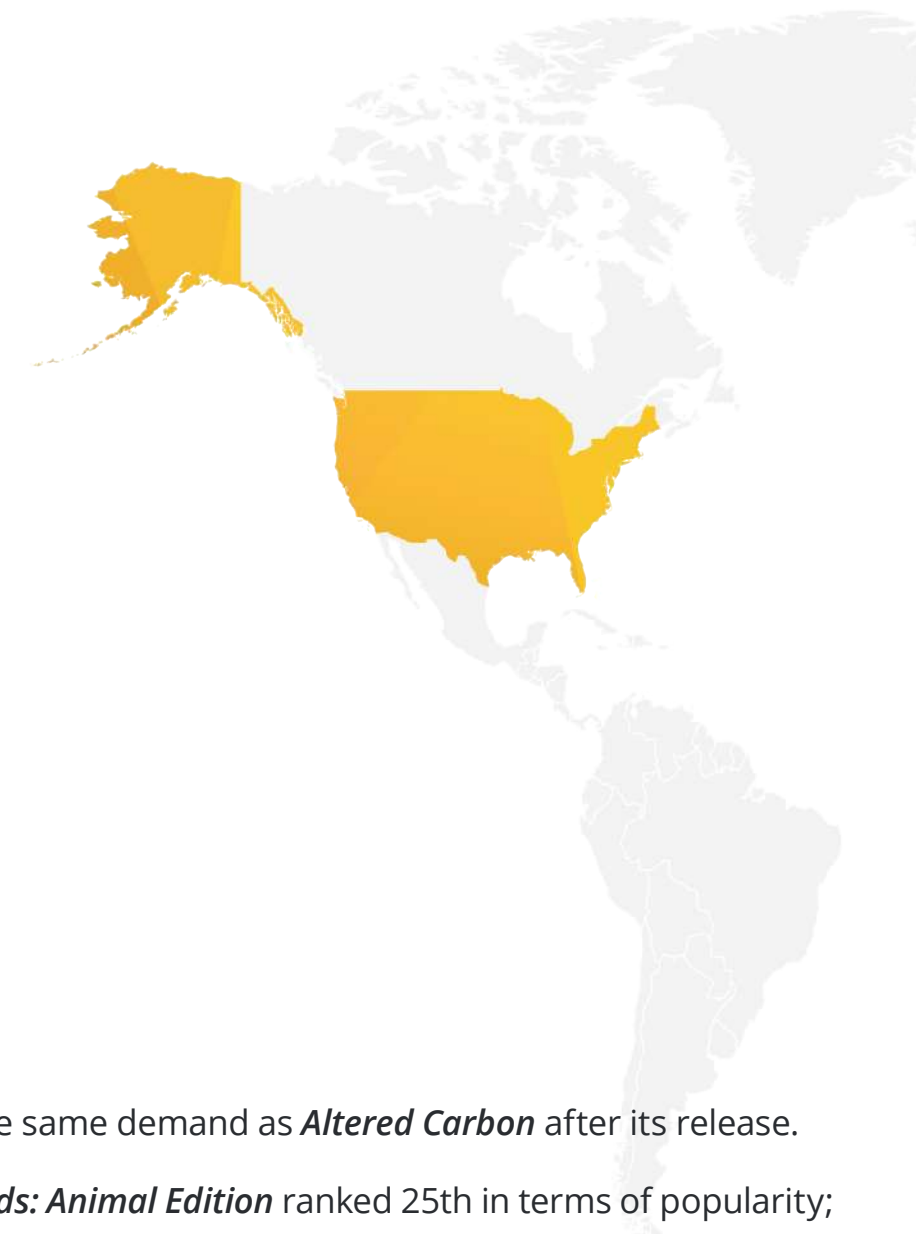
▸ **Star Trek: Discovery** was the most popular digital original series due to the growing popularity of the second half of its first season.

▸ While **Everything Sucks!** decreased in demand since its release and was cancelled, **On My Block** grew in demand and was renewed for a second season.

▸ The trailer for **Jessica Jones** had about the same demand as **Altered Carbon** after its release.

▸ The Facebook Watch series **Comeback Kids: Animal Edition** ranked 25th in terms of popularity; it has the most views and shares of any show on the platform.

# Top digital original series in the United States

January–March, 2018 | Average Daily Demand Expressions

**The top 20 most in-demand digital original series:**

Avg. Demand Expressions

| # | Series | Platform | Genre | Avg. Demand Expressions | |
|---|--------|----------|-------|------------------------|---|
| 1 | Star Trek: Discovery | CBS All Access | Science Fiction | 44,308,723 | |
| 2 | Stranger Things | Netflix | Science Fiction | 28,264,423 | |
| 3 | Black Mirror | Netflix | Science Fiction | 17,738,483 | |
| 4 | The Grand Tour | Amazon Video | Reality | 14,496,688 | |
| 5 | Marvel's Jessica Jones | Netflix | Drama | 14,273,652 | |
| 6 | On My Block | Netflix | Drama | 14,102,542 | |
| 7 | Orange Is The New Black | Netflix | Comedy Drama | 13,598,443 | |
| 8 | Marvel's Daredevil | Netflix | Drama | 12,200,820 | |
| 9 | Altered Carbon | Netflix | Science Fiction | 11,915,361 | |
| 10 | 13 Reasons Why | Netflix | Drama | 11,545,885 | |
| 11 | The Crown | Netflix | Drama | 10,274,357 | |
| 12 | Marvel's Runaways | Hulu | Drama | 10,125,740 | |
| 13 | Everything Sucks! | Netflix | Comedy | 9,850,135 | |
| 14 | Marvel's The Punisher | Netflix | Drama | 9,745,008 | |
| 15 | Narcos | Netflix | Drama | 9,506,331 | |
| 16 | Sense8 | Netflix | Science Fiction | 9,098,552 | |
| 17 | Voltron: Legendary Defender | Netflix | Children | 9,039,221 | |
| 18 | Dark | Netflix | Drama | 8,849,947 | |
| 19 | Grace And Frankie | Netflix | Comedy | 8,839,579 | |
| 20 | The Handmaid's Tale | Hulu | Drama | 8,005,478 | |

**A selection of 5 additional digital original series of interest:**

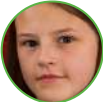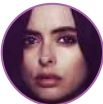| # | Series | Platform | Genre | Avg. Demand Expressions | |
|---|--------|----------|-------|------------------------|---|
| 28 | The Marvelous Mrs. Maisel | Amazon Video | Comedy Drama | 6,006,816 | |
| 33 | The Path | Hulu | Drama | 5,721,953 | |
| 42 | The Good Fight | CBS All Access | Drama | 4,662,534 | |
| 55 | Nas Daily | Facebook Watch | Reality | 3,585,608 | |
| 61 | Carpool Karaoke | Apple Music | Reality | 3,470,330 | |

-- No platform information available, please refer to Appendix

PARROT ANALYTICS

## Appendix

January–March, 2018

# Methodology

Gain an understanding of Parrot Analytics' global demand measurement system, how demand is averaged to produce our country-specific digital original rankings, how it is possible that content can generate demand in markets where a title or platform is not yet available, and how we approached this quarter's Global SVOD subscription purchase propensity study.

# Methodology for global television demand measurement

January–March, 2018
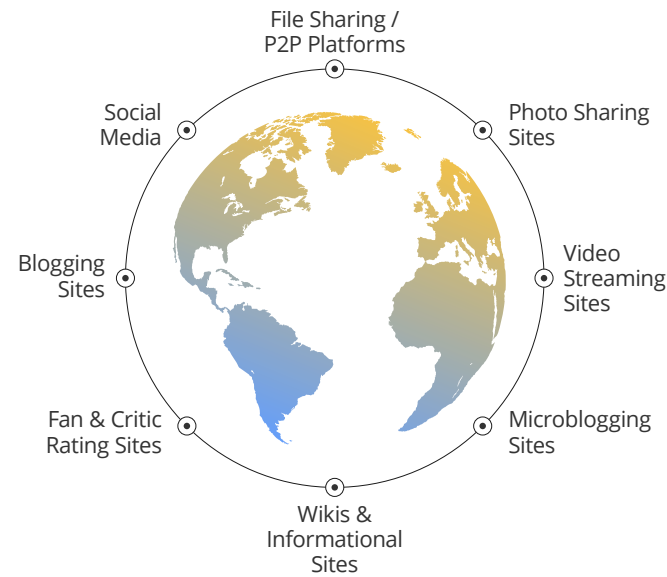
Consumers express their demand for content through various "demand expression platforms" including:

- Video Streaming Platforms
- Social Media Platforms
- Photo Sharing Platforms
- Blogging & Microblogging Platforms
- Fan & Critic Rating Platforms
- Wikis & Informational Sites
- Peer-to-Peer Protocols
- File-Sharing Platforms

## Industry-first: DemandRank™

**Parrot Analytics** captures cross-platform audience demand for content around the world. Audience demand reflects the desire, engagement and viewership, weighted by importance; so a stream/download is a higher expression of demand than a passive impression or a comment.

Higher

| DEMAND |
|---|
| Monetary Expressions |
| Creative Participation |
| Active Consumption |
| Deep Research |
| Social Encouragement |
| Public Posting |
| Expressing an Opinion |
| Subscribing to Updates |
| Indicating Interest |
| Passive Impressions |

Lower
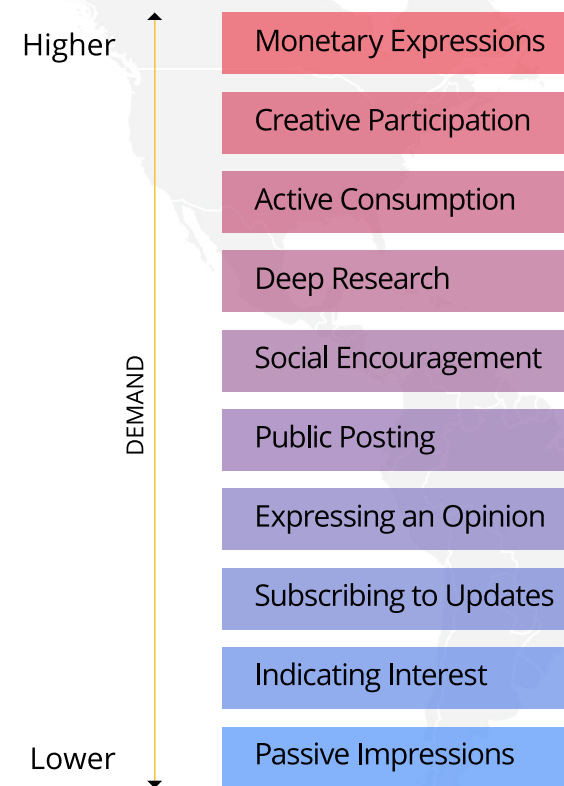
## Demand Expressions®

Total audience demand being expressed for a title, within a market.

## Characteristics of Demand Expressions®:

- They measure actual, expressed demand. **Parrot Analytics** does not use panel data.

- They encompass demand expressed by audiences from a multitude of sources, weighted by importance.

- There is no ceiling to how many **Demand Expressions®** a title can generate in a market.

# Methodology for averaging demand

January–March, 2018

## Simulated demand for al-at-once and episodic releases

Examples of platforms that generally release titles **all-at-once**:

**Amazon Video**

**Crackle**

**Netflix**

**YouTube Red**

Examples of platforms that generally release titles **episodically**:
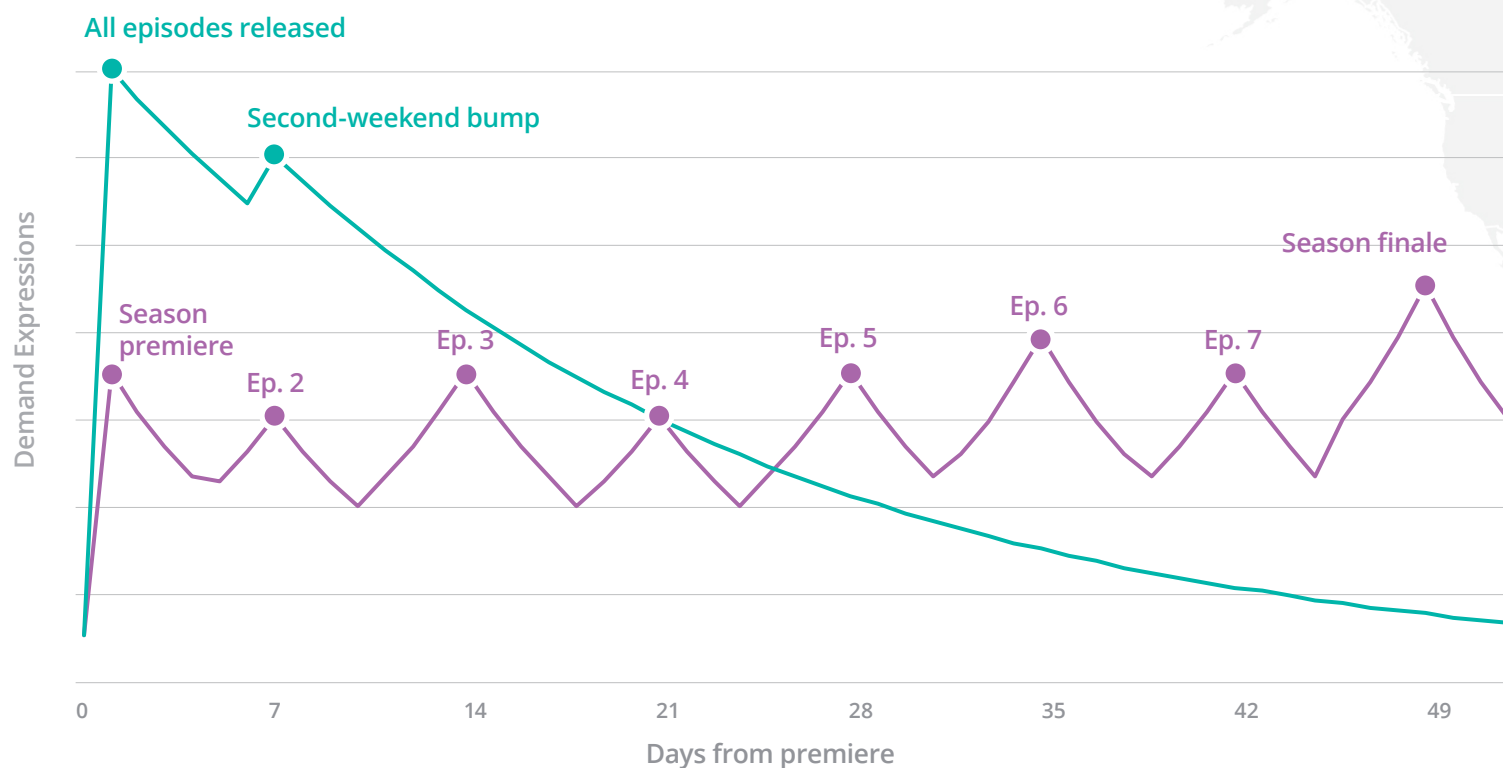
**Hulu**

**CBS All Access**

**Apple Music**



- The way in which an SVOD platform releases new episodes of its digital original series affects how the demand for these titles develop.

- Netflix pioneered the all-at-once method, where all episodes are released on a single day. This release method helped popularize binge-watching as viewers did not have to wait a week to watch the next episode; however, it has the side-effect of having demand for the show decline immediately after release. There is often a slight increase in demand during the second weekend after release as more people finish the season, but generally demand for shows plateau in about one month.

- In contrast, the episodic release schedule maintains demand throughout the season as people keep returning each week, but its premiere demand may not be as high because only one episode is available.

*To be consistent, in this report we average demand over the month post-release for all-at-once titles and from season premiere to season finale for episodic titles.*

Note: The average demand for these **all-at-once** and **episodic** titles are the same over this time period.

| *Demand Expressions®: The total audience demand being expressed for a title, within a country, on any platform.*

PARROT ANALYTICS

# Methodology for demand attribution

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**

- 10%
- 9%
- 10%
- 71% Netflix
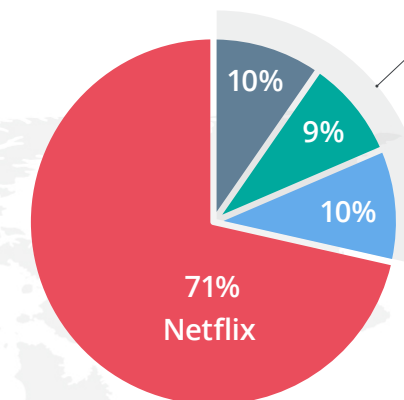
■ Other Platforms
(CBS All Sccess, Crackle, Facebook, Apple Music, Seeso, Youtube Red)

**Total platform demand in 2017 (ex. Netflix)**

Demand Expressions

500 M
400 M
300 M
200 M
100 M
0

Week 1  4  7  10  13  16  19  22  25  28  31  34  37  40  43  46  49  52

2017 | Week Number
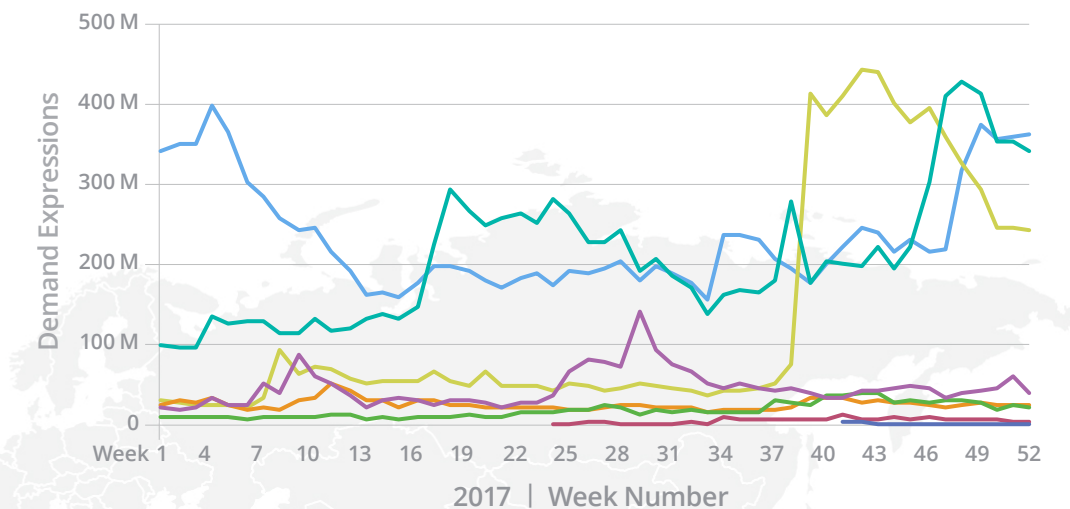
■ Amazon Video    ■ CBS All Access    ■ Facebook    ■ Seeso
■ Hulu    ■ Crackle    ■ Apple Music    ■ Youtube Red

PARROT ANALYTICS

# Methodology for Global SVOD subscription purchase propensity study

January–March, 2018

**Parrot Analytics** conducted a global survey in 4 markets with 500 respondents each, for a total of n=2,000 across all surveys and territories. Each survey asked a single question about how many video streaming platforms the respondent was willing to subscribe to. The text of the question and answers were translated into each country's primary language, and read as follows:

**What is the maximum number of video streaming subscriptions you are willing to pay for (e.g. Netflix, Hulu, Amazon Video, etc.)?**

▸ 0

▸ 1

▸ 2

▸ 3

▸ 4+

**For more information on Google Surveys, please refer to the whitepaper here.**

Note: Here we have explained the methodology used for our specific study of a respondent's willingness to subscribe to video streaming platforms, which was based on a global survey carried out by Parrot Analytics.

It must be noted, however, that our Demand Expressions metric underlying our global tv demand measurement does not use sampling extrapolation. Instead, our global demand measurement system captures all known activities from the total population, in all markets, in real-time.

**Download** *Parrot Analytics' comprehensive whitepapers, industry analyses and global TV demand case studies.*

**DOWNLOAD**

*Survey Methodology: Audience Content Discovery survey carried out in 10 markets by Parrot Analytics in December 2017, n=10,000.*

PARROT ANALYTICS

# About **Parrot Analytics**

*Parrot Analytics* is a data science company that empowers media & entertainment companies, brands and agencies to understand global audience demand for television content. Wielding the world's largest audience behavior data sets, the company has developed the world's only global cross-platform, country- specific audience demand measurement system.

*Parrot Analytics* captures an unprecedented spectrum of actual fan and audience behavior including video streaming consumption, social media, blogging platforms, file-sharing and peer-to-peer consumption spanning 100+ countries. This enables media companies, for the very first time, to understand audience demand for content across all content distribution platforms in all markets around the world.

*Parrot Analytics*' leadership includes a group of media industry executives, creatives and scientists who believe in the magic of content and the impact it has on people's lives. The company is on a mission to connect content creators and consumers by enabling data-driven decisions across the industry.

For more information, visit **parrotanalytics.com**

*Demand Expressions®: The total audience demand being expressed for a title, within a country, on any platform.*

# 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.

**BOOK DEMO**