

# The Global Television Demand Report

Global SVOD platform demand share, digital original series popularity and genre demand share trends in **Q1 2019**



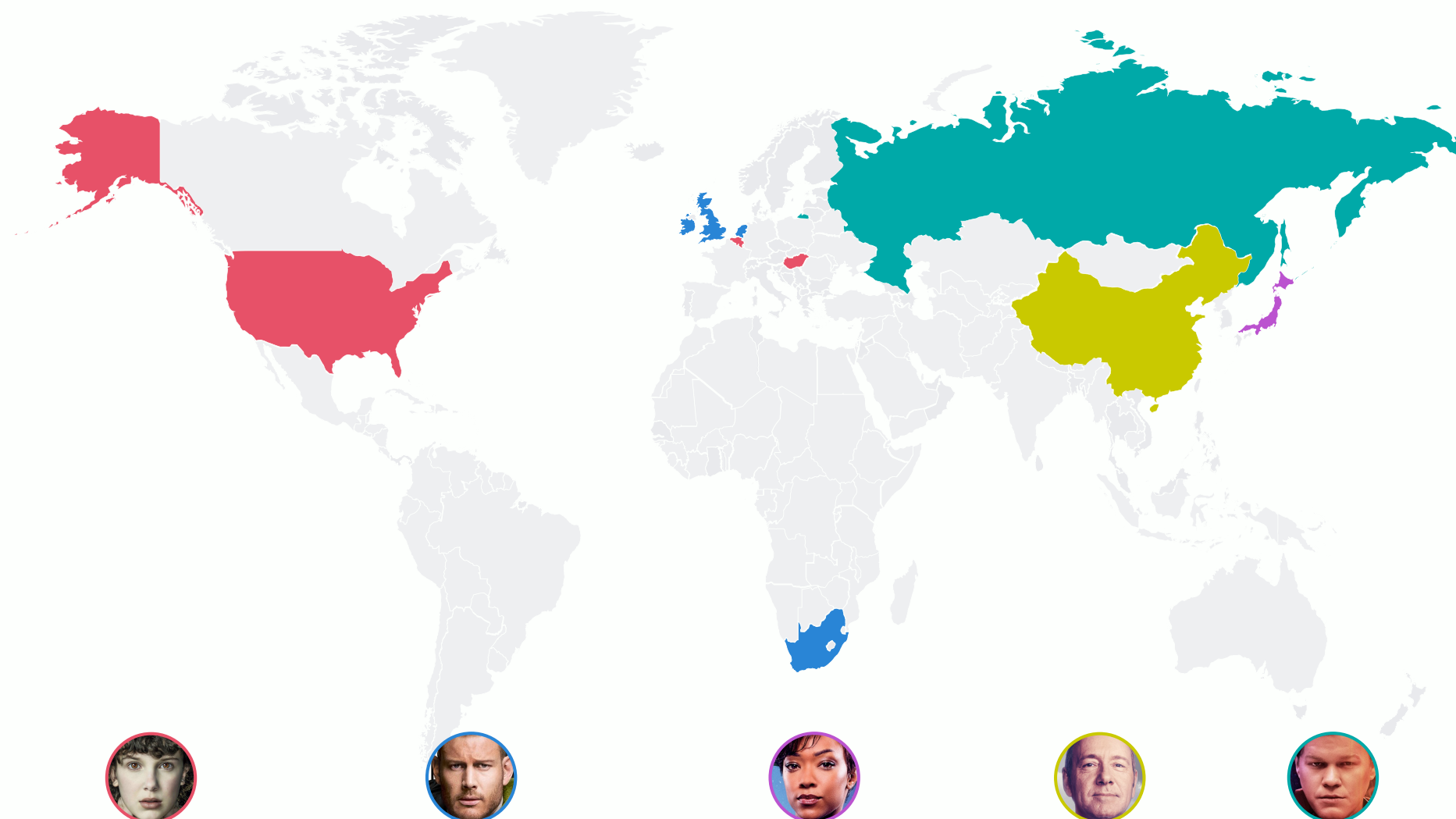
Copyright © 2019 Parrot Analytics. All rights reserved.



# Executive Summary

January – March, 2019

- A wide range of digital original series are topping markets in Q1. Five separate series were the most in-demand title in at least one market.
- Netflix's *The Umbrella Academy* is the most in-demand digital original in the highest number of markets profiled in this report.
- Overall, Netflix retains its market-leading position with 64.6% of the global digital original demand share; we have incorporated 100+ markets to arrive at this determination.
- However, the 24 month platform share trend in each of the 10 markets in this study reveals that Netflix's share is slowly declining in most markets.
- Indeed, for the first time ever Netflix's demand share has dipped below 50% for some market/genre combinations.
- For action/adventure titles in both the USA and Japan, demand for originals produced by other services pushed the Netflix demand share down to around 47.5%.
- The highest demand subgenres were very uniform across markets with superhero and sci-fi dramas dominating the top two positions: In 7 markets superhero series come out on front whilst in 3 markets sci-fi dramas are ranked first. The third largest subgenre was either comedy drama (6 markets) or crime drama (4 markets).



## *Stranger Things*

- United States
- Belgium
- Hungary

## *The Umbrella Academy*

- United Kingdom
- Ireland
- Netherlands
- South Africa

## *Star Trek: Discovery*

- Japan

## *House of Cards*

- China

## *Black Mirror*

- Russia

# Executive Summary

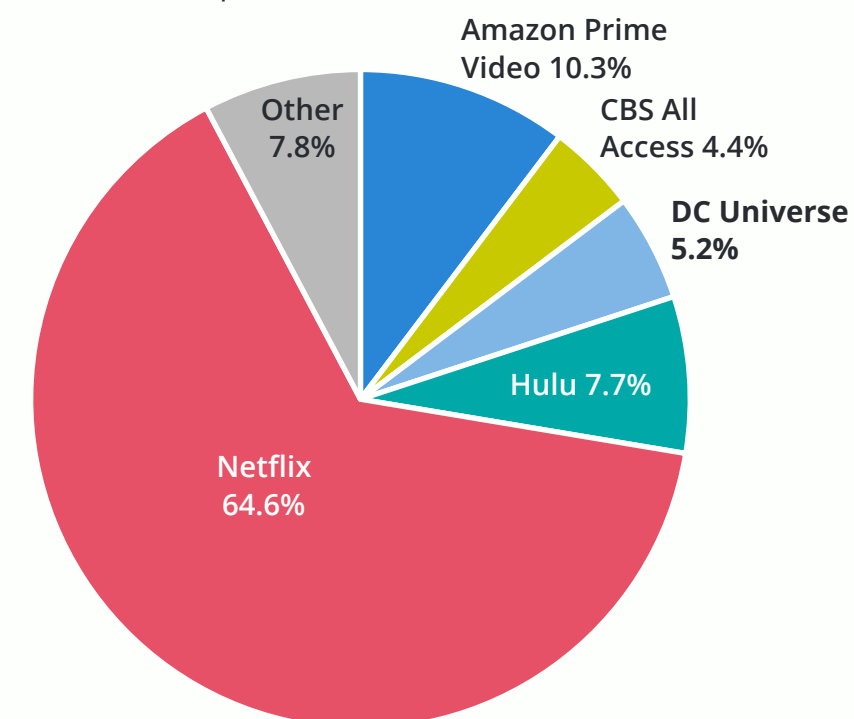
January – March, 2019

## Major SVOD platform events (Quarter 1, 2019)

- At the 76<sup>th</sup> Golden Globes streaming services swept the major TV comedy awards. Netflix's *The Kominsky Method* won both Best Comedy and Best Comedy Actor while Amazon Prime Video's *The Marvelous Mrs Maisel* won Best Comedy Actress.
- On February 14<sup>th</sup>, CBS announced that CBS All Access had reached 8 million subscribers 2 years ahead of schedule.
- The Canal+ Séries platform launched in France on March 12<sup>th</sup>, offering subscribers access to TV series including original series.
- The Disney/FOX merger completed on March 20<sup>th</sup>, making Disney the majority owner of US streaming service Hulu.
- On March 25<sup>th</sup>, Apple announced Apple TV+, a subscription service that will launch in Fall 2019 with originals starring top Hollywood talent.

## Global demand share by original platform for all digital originals

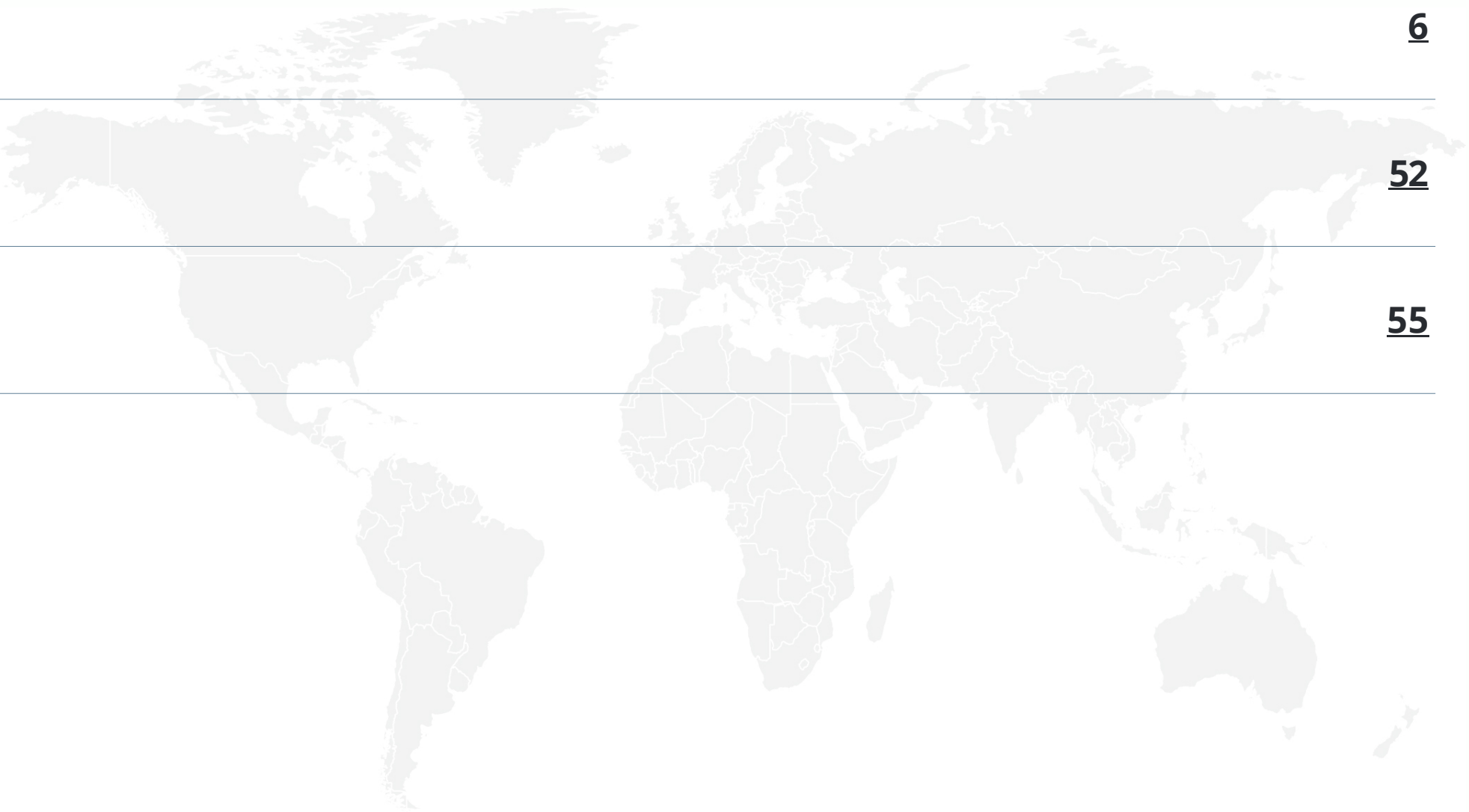
Global platform demand share (Q1 2019)



- Across all markets, the share of demand for digital original series is highest for Netflix series: 64.6% of the global demand for digital originals is expressed for a Netflix Original.
- The 64.6% figure for 2019 Q1 is more than 6% lower than in our last report, where Netflix managed a 71% global share of demand for the 2018 calendar year.
- Amazon Prime Video and Hulu also lost more than 1% each.
- Increased demand for series from YouTube Premium and DC Universe is driving these changes.

Contents

Introduction	<u>5</u>
Market-specific TV content trends	<u>6</u>
Spotlight China: English-language digital originals trends	<u>52</u>
Appendix: The global demand measurement standard	<u>55</u>



# Introduction

January – March, 2019

## 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 in the reporting period, representing the most successful 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.*

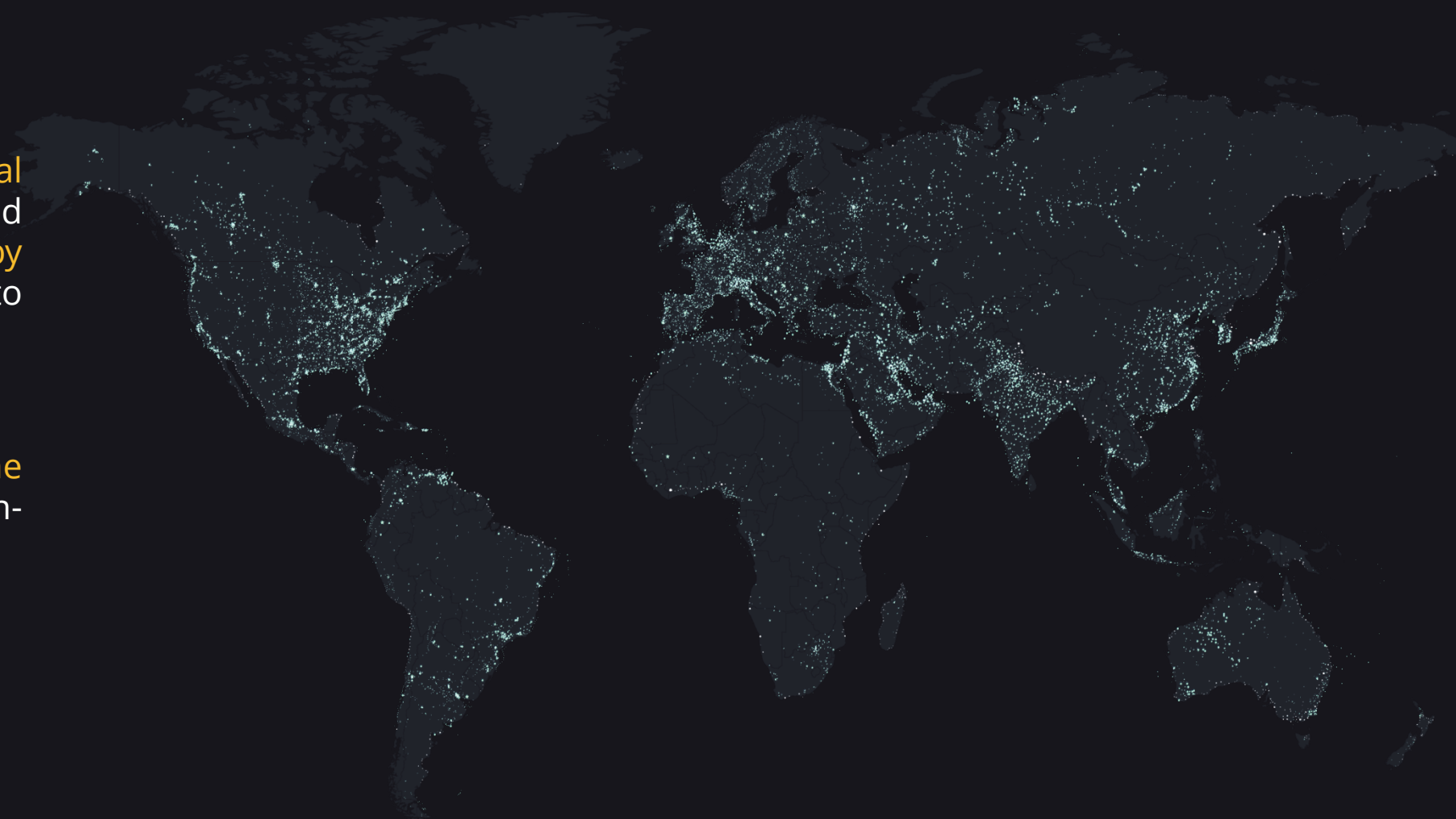


## Market-specific TV content trends

### SVOD platform market demand share and digital original genre and subgenre trends

In this section we present each market's SVOD demand share by original platform for digital originals and break this down for drama and action/adventure digital originals. We also reveal the demand share by genres and the most in-demand subgenres of digital original series to show which type of content is gaining the most traction in each market.

Finally, we include for each market a demand distribution of some of the most in-demand digital originals and we reveal the top 20 overall most in-demand digital originals across all platforms.

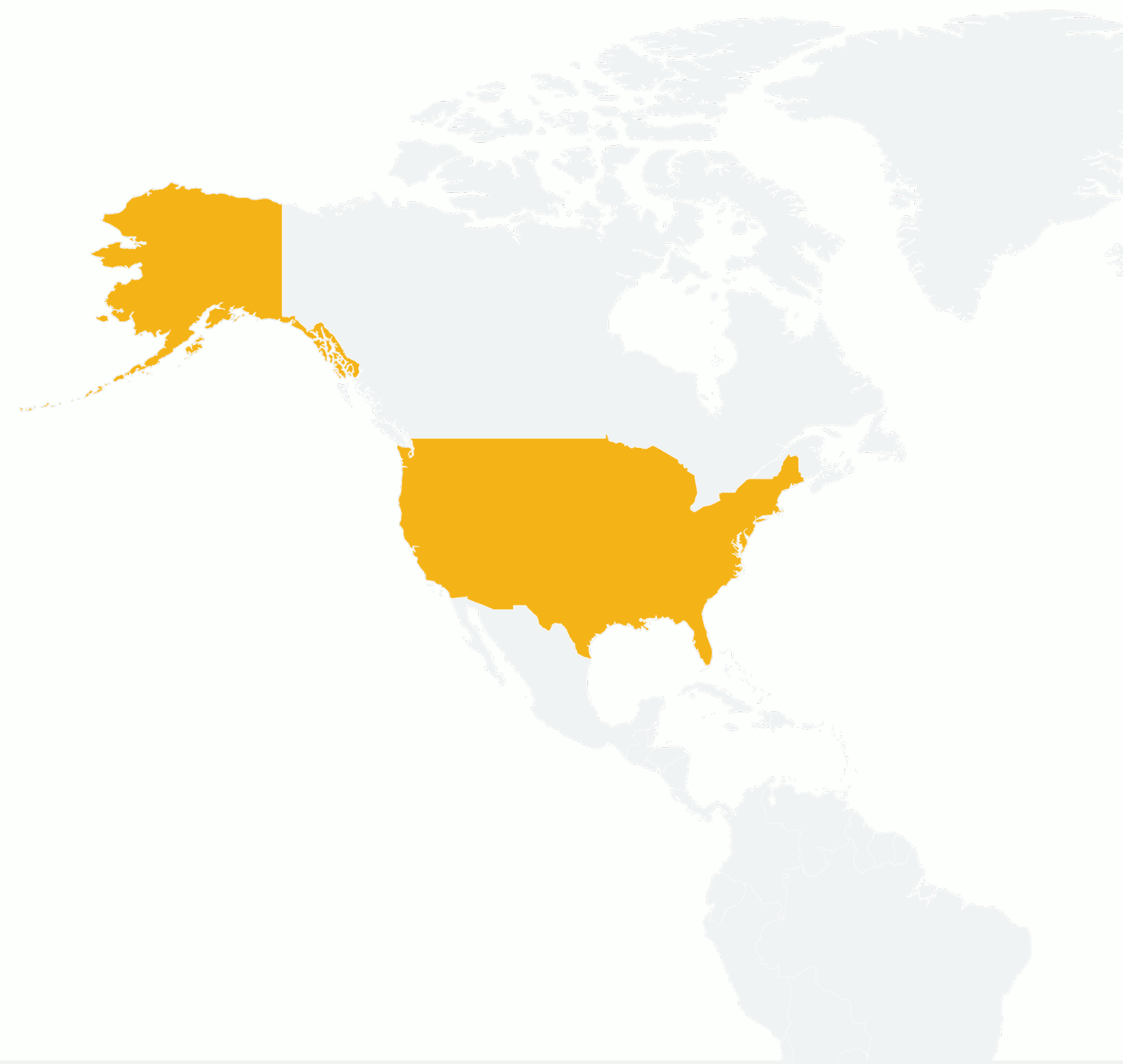


## Genre, subgenre, platform demand share and digital original trends

### United States

Learn which genres and subgenres of digital originals are most demanded by American audiences. Discover the demand share of the leading SVOD platforms over the past 24 months and explore demand for the top streaming originals.

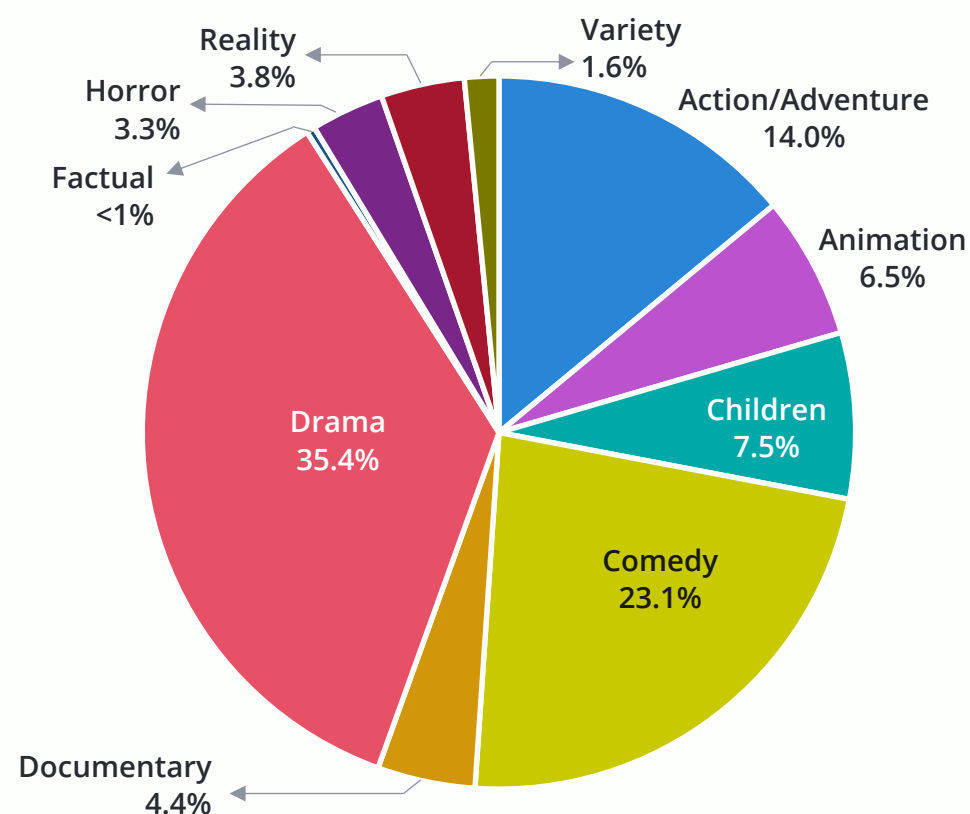
NOTE: The insights presented in this section are based on the entire available Parrot Analytics globalTV demand dataset, which is comprised of 3.5 trillion data points across 100+ languages in 100+ countries.



# United States digital original genre and subgenre preferences

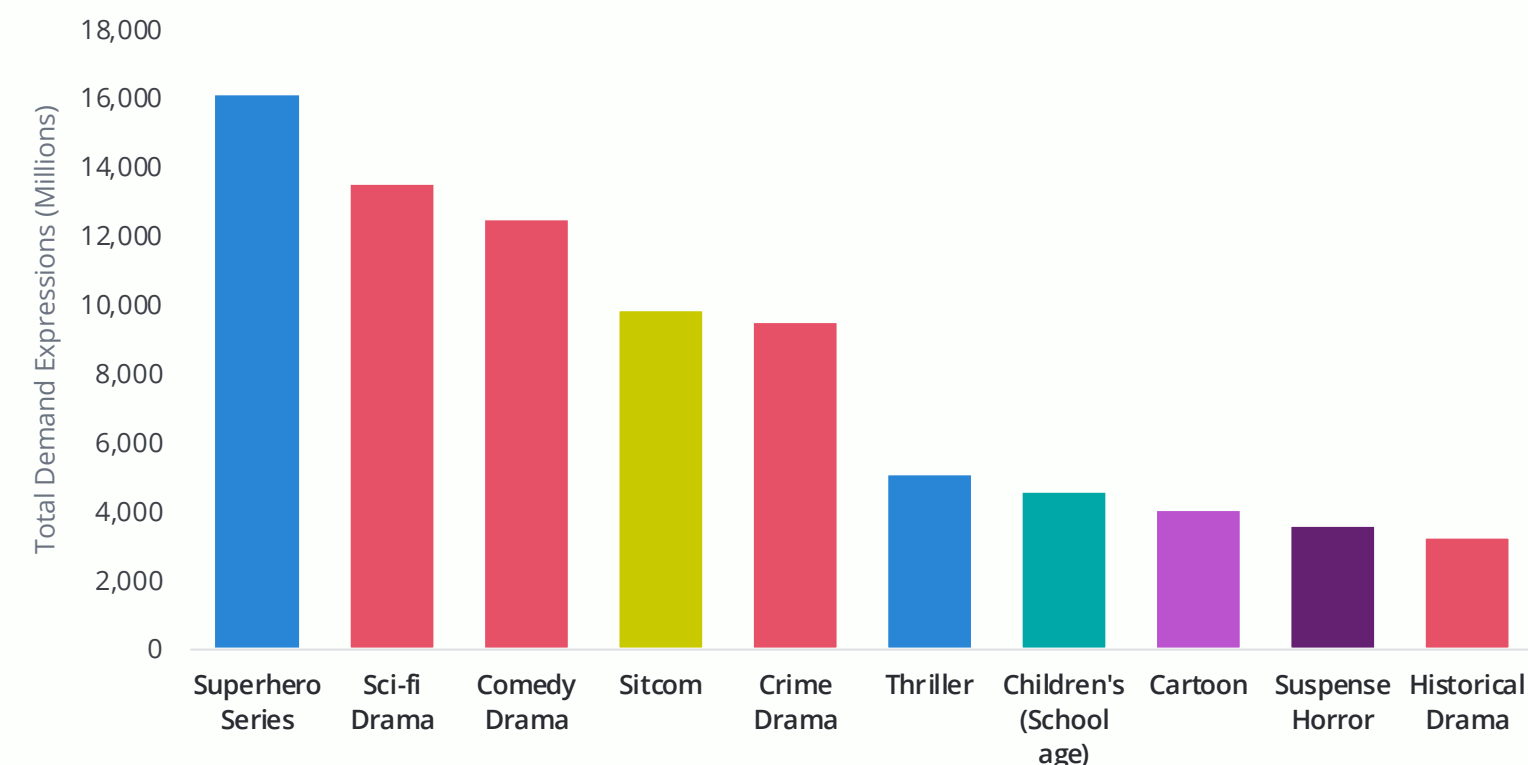
January – March, 2019

United States digital original series genre demand share (Q1 2019)



- Drama digital originals represent the large share of demand in this market (35.4%) followed by Comedy digital originals (23.1%).
- Of all the markets in this report, the US has the largest demand for 4 genres: Compared to the other nine markets profiled, US audiences are engaging the most with children's titles (7.5% of US digital original Q1 demand), reality (3.8%), comedy (23.1%) and factual (0.4%)
- America is the only market with a significant demand share for digital original factual content, though even in this market it represents less than 1% of total demand. This indicates a significant growth opportunity for SVODs especially in some of the other markets discussed in this report.

The 10 most in-demand subgenres for digital originals in the United States (Q1 2019)



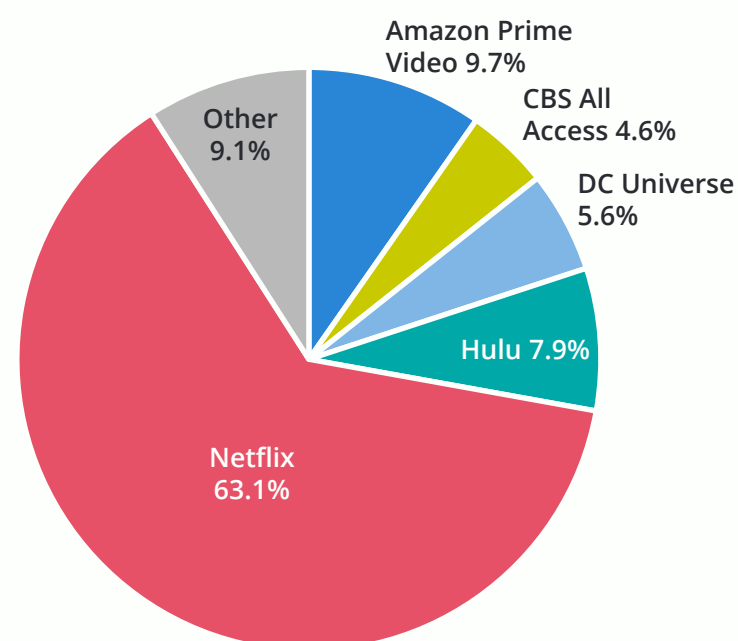
- As in all the markets in this report, the two largest subgenres in the USA are superhero series and sci-fi drama. In the USA, superhero content has the most Q1 demand.
- Four of the ten most in-demand subgenres are in the drama genre.
- US audiences have a love of the animation genre second only to Japan but express it for different types of animation titles: Unlike Japan, Americans favour cartoons over anime.

# United States platform demand share and digital originals demand distribution

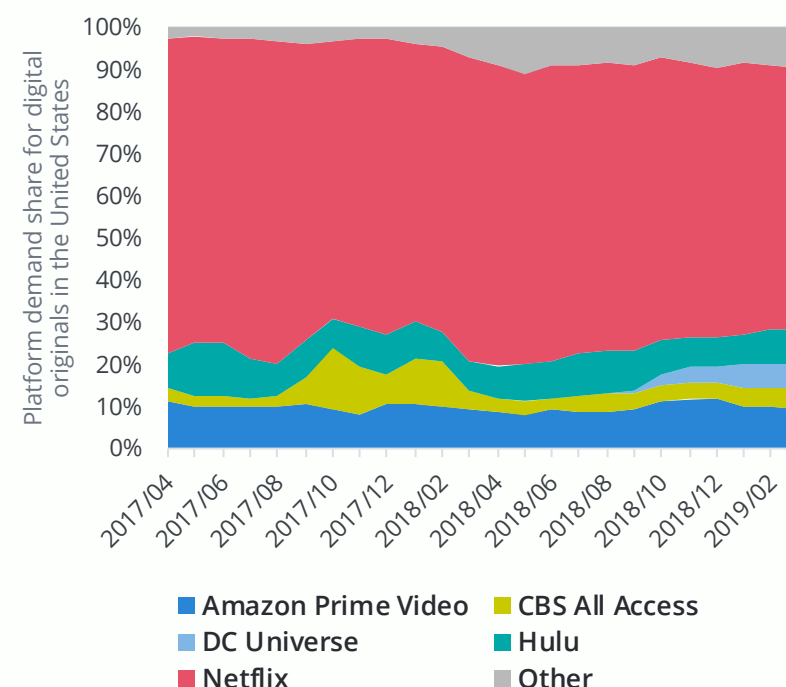
April, 2017 – March, 2019

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

Platform demand share (Q1 2019)



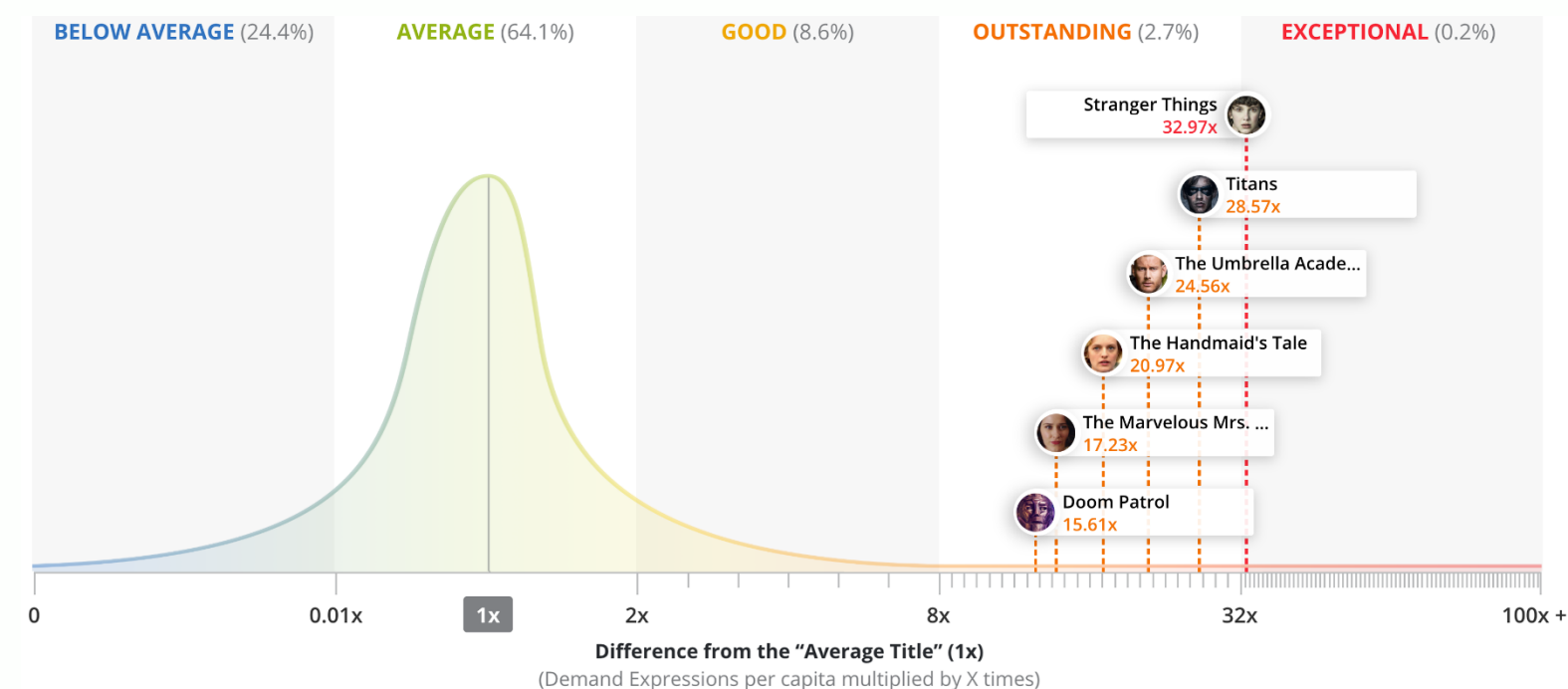
Platform demand share trend (24 months)



- Across all genres of digital original titles in the USA, Netflix titles account for 63.1% of expressed demand in Q1 of 2019.
- The second highest demand share is for originals from Amazon Prime Video, which accounts for 9.7%.
- The 24 month platform demand share trend shows that Netflix's share is slowly declining in 2019 Q1, with DC Universe maintaining the position it carved out for itself in late 2018.

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

Show position in Demand Distribution (Q1 2019)

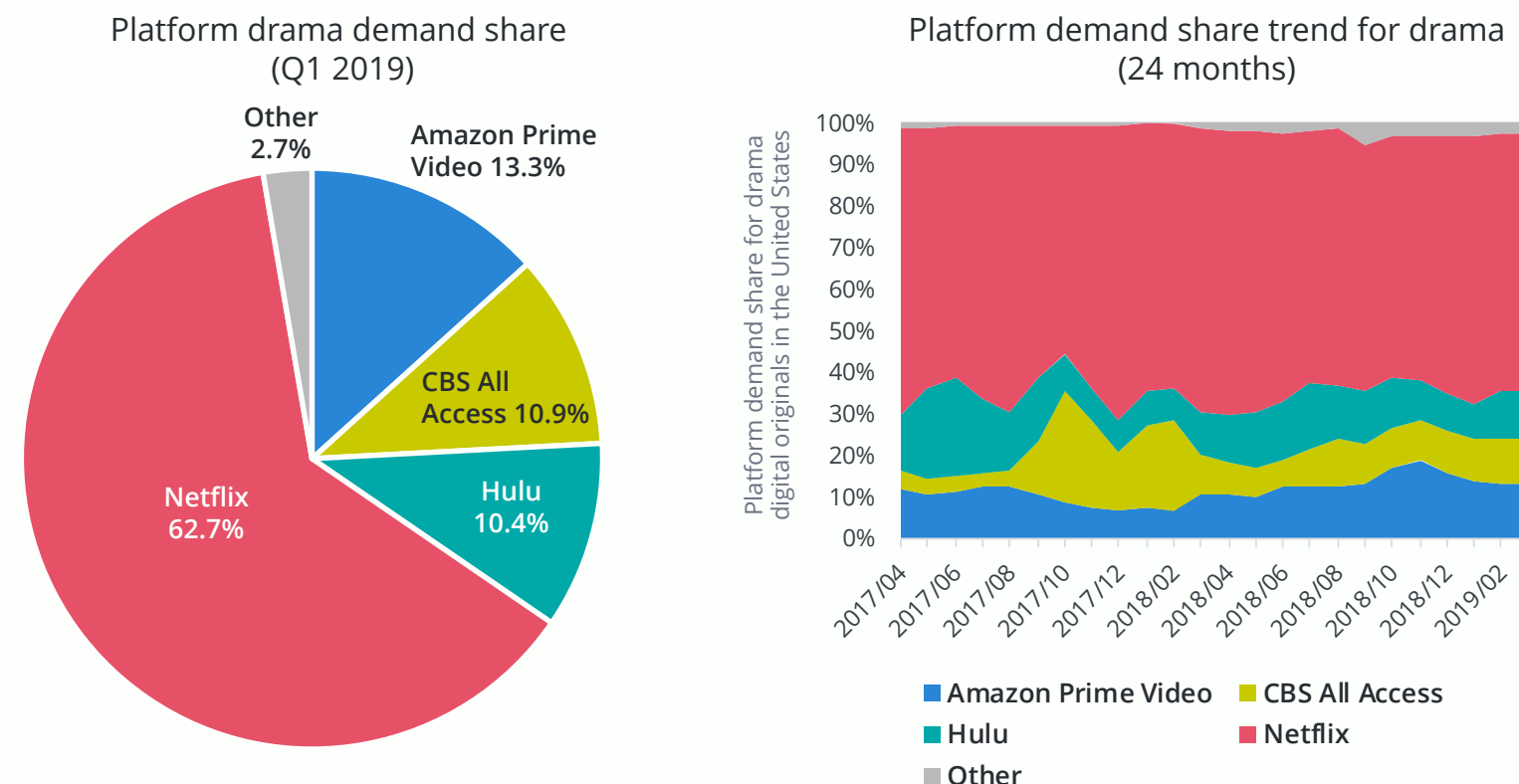


- The most in-demand digital original series in the United States in 2019 Q1 is Netflix's **Stranger Things**. It has 33.0 times more demand than the average title, making it one of the 0.2% of titles that are classed as 'Exceptional'.
- Two titles that premiered in the middle of the quarter achieved high demand in the US, DC Universe's **Doom Patrol** and Netflix title **The Umbrella Academy**, both of which premiered on February 15<sup>th</sup>.
- Demand for Amazon Prime Video's comedy **The Marvelous Mrs. Maisel** remains high after season 2 was released at the end of last quarter. It had over 17.2 times more demand than the average title in Q1.

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

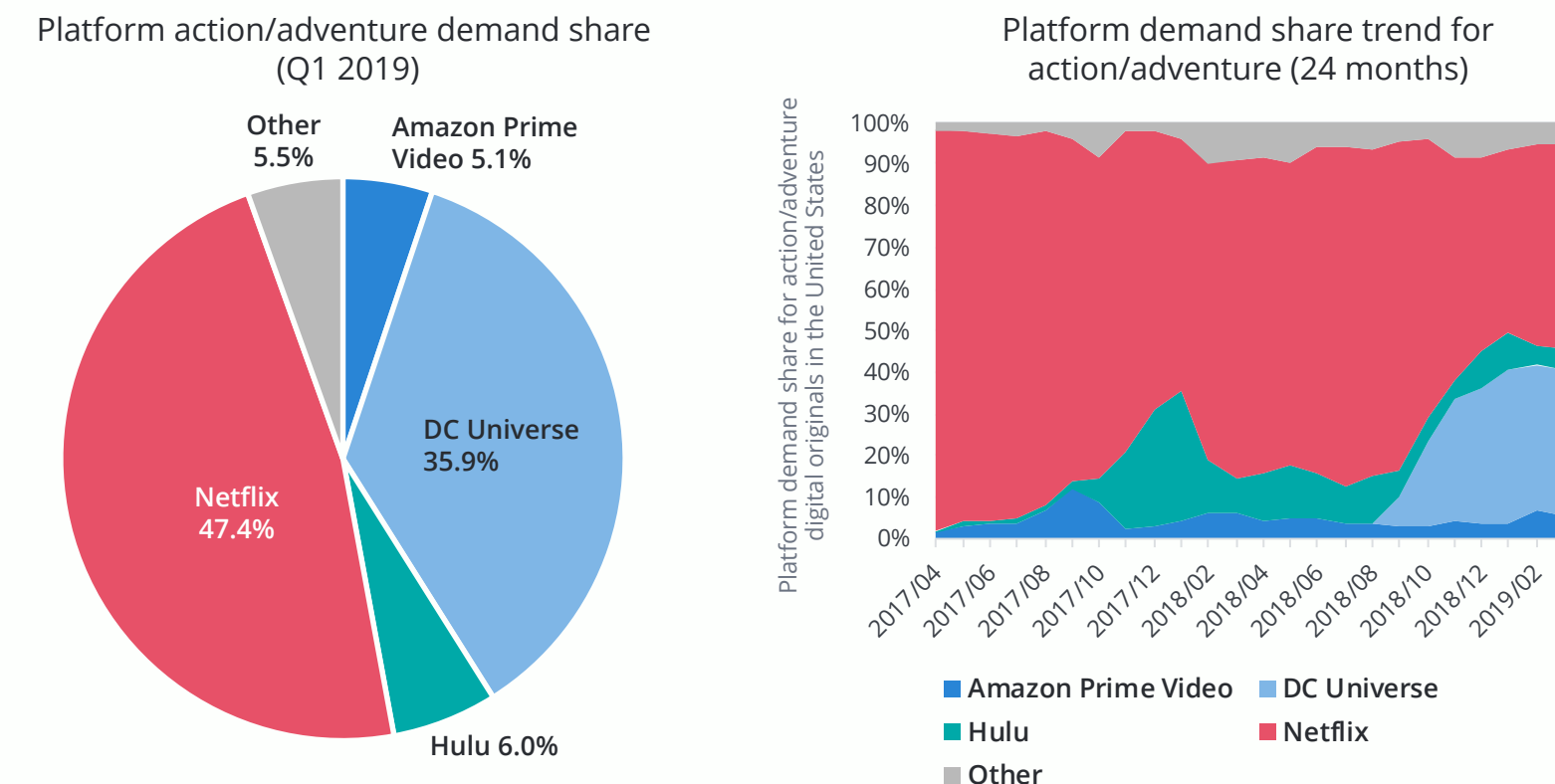
April, 2017 – March, 2019

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



- With 62.7% of the demand share for drama digital original titles, in 2019 Q1 Netflix titles account for a majority of the demand expressed for this genre in the USA.
- The drama platform demand share in the USA is largely in line with the other markets in this report, although with 13.3% Amazon Prime Video has an above-average share in this market.
- The 24 month demand share trend chart shows that these shares have been generally stable over the past few months, although demand for Amazon drama originals increased significantly around the end of 2018.

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



- The US is one of two markets where Netflix action/adventure originals do not have at least 50% of the demand share. The other is Japan.
- However, Netflix originals still account for 47.4% of demand for this genre and so Netflix is still the largest single platform in the US.
- DC Universe has the largest demand share of all markets in this report in the US, capturing 36% of US demand for originals in this genre. This is in line with expectations as the US is the only market where all the DC Universe titles are officially available.
- The 24 month trend shows how the arrival of DC Universe action/adventure originals has impacted the market, although recently it appears that demand has stabilised.

# Top digital original series in the United States

January – March, 2019

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

Series Name	In-Market Platform*	Original Platform	Genre	Average daily Demand Expressions (DEx) in Q1 2019	
1 <i>Stranger Things</i>	Netflix	Netflix	Drama	33,728,748	
2 <i>Titans</i>	DC Universe	DC Universe	Action and Adventure	29,111,863	
3 <i>Star Trek: Discovery</i>	CBS All Access	CBS All Access	Drama	25,027,670	
4 <i>The Umbrella Academy</i>	Netflix	Netflix	Action and Adventure	24,971,378	
5 <i>Marvel's Daredevil</i>	Netflix	Netflix	Action and Adventure	23,210,028	
6 <i>The Handmaid's Tale</i>	Hulu	Hulu	Drama	21,186,574	
7 <i>Narcos</i>	Netflix	Netflix	Drama	21,106,248	
8 <i>Young Justice</i>	DC Universe	DC Universe	Action and Adventure	20,321,054	
9 <i>Marvel's The Punisher</i>	Netflix	Netflix	Action and Adventure	20,264,837	
10 <i>Black Mirror</i>	Netflix	Netflix	Drama	18,942,137	
11 <i>Orange Is The New Black</i>	Netflix	Netflix	Comedy	18,784,988	
12 <i>The Marvelous Mrs. Maisel</i>	Amazon Prime Video	Amazon Prime Video	Comedy	17,575,727	
13 <i>You</i>	Netflix	Netflix	Drama	16,651,277	
14 <i>Doom Patrol</i>	DC Universe	DC Universe	Action and Adventure	15,784,903	
15 <i>13 Reasons Why</i>	Netflix	Netflix	Drama	15,408,904	
16 <i>Grace And Frankie</i>	Netflix	Netflix	Comedy	14,850,805	
17 <i>One Day At A Time</i>	Netflix	Netflix	Comedy	14,731,360	
18 <i>Chilling Adventures Of Sabrina</i>	Netflix	Netflix	Horror	14,270,828	
19 <i>The Grand Tour</i>	Amazon Prime Video	Amazon Prime Video	Sports	13,800,134	
20 <i>Voltron: Legendary Defender</i>	Netflix	Netflix	Children	13,048,940	

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

22 <i>Marvel's Runaways</i>	Hulu	Hulu	Action and Adventure	12,219,434	
34 <i>The Dragon Prince</i>	Netflix	Netflix	Children	11,966,983	
35 <i>The Man In The High Castle</i>	Amazon Prime Video	Amazon Prime Video	Drama	11,637,272	
44 <i>On My Block</i>	Netflix	Netflix	Comedy	10,949,509	
51 <i>Wayne</i>	YouTube Premium	YouTube Premium	Comedy	7,686,433	

\* Distributor for most recent season in case of multiple platforms

-- No platform information available, please refer to appendix

## Genre, subgenre, platform demand share and digital original trends

### Belgium

Learn which genres and subgenres of digital originals are most demanded by Belgian audiences. Discover the demand share of the leading SVOD platforms over the past 24 months and explore demand for the top streaming originals.

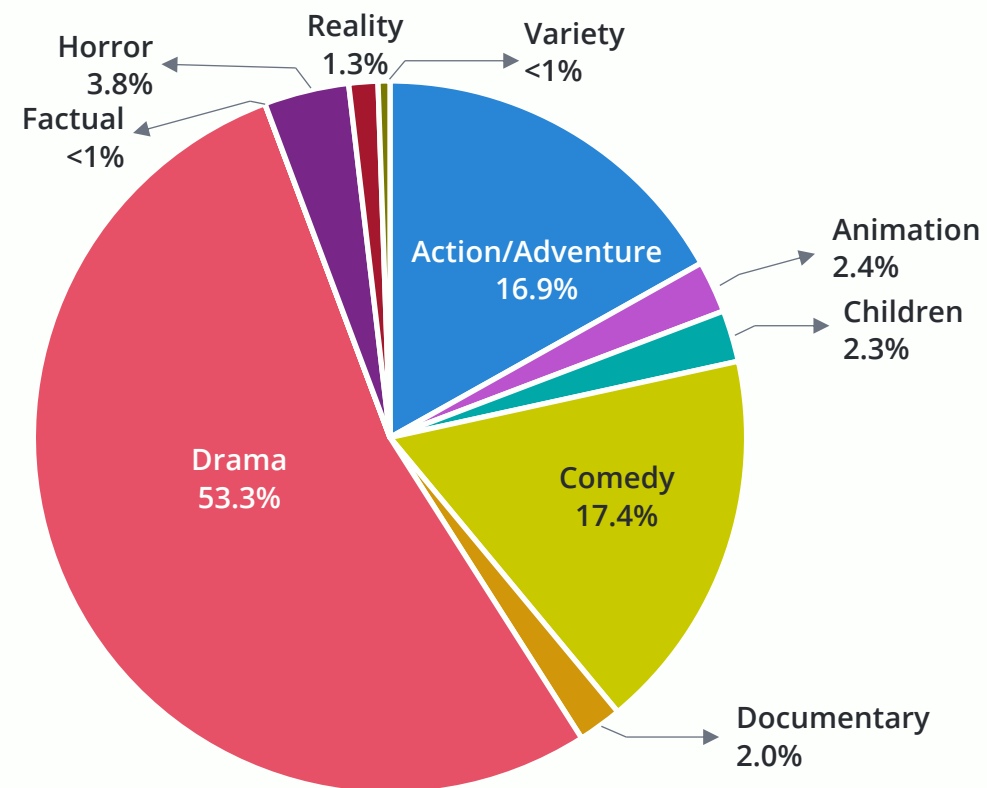
NOTE: The insights presented in this section are based on the entire available Parrot Analytics globalTV demand dataset, which is comprised of 3.5 trillion data points across 100+ languages in 100+ countries.



# Belgium digital original genre and subgenre preferences

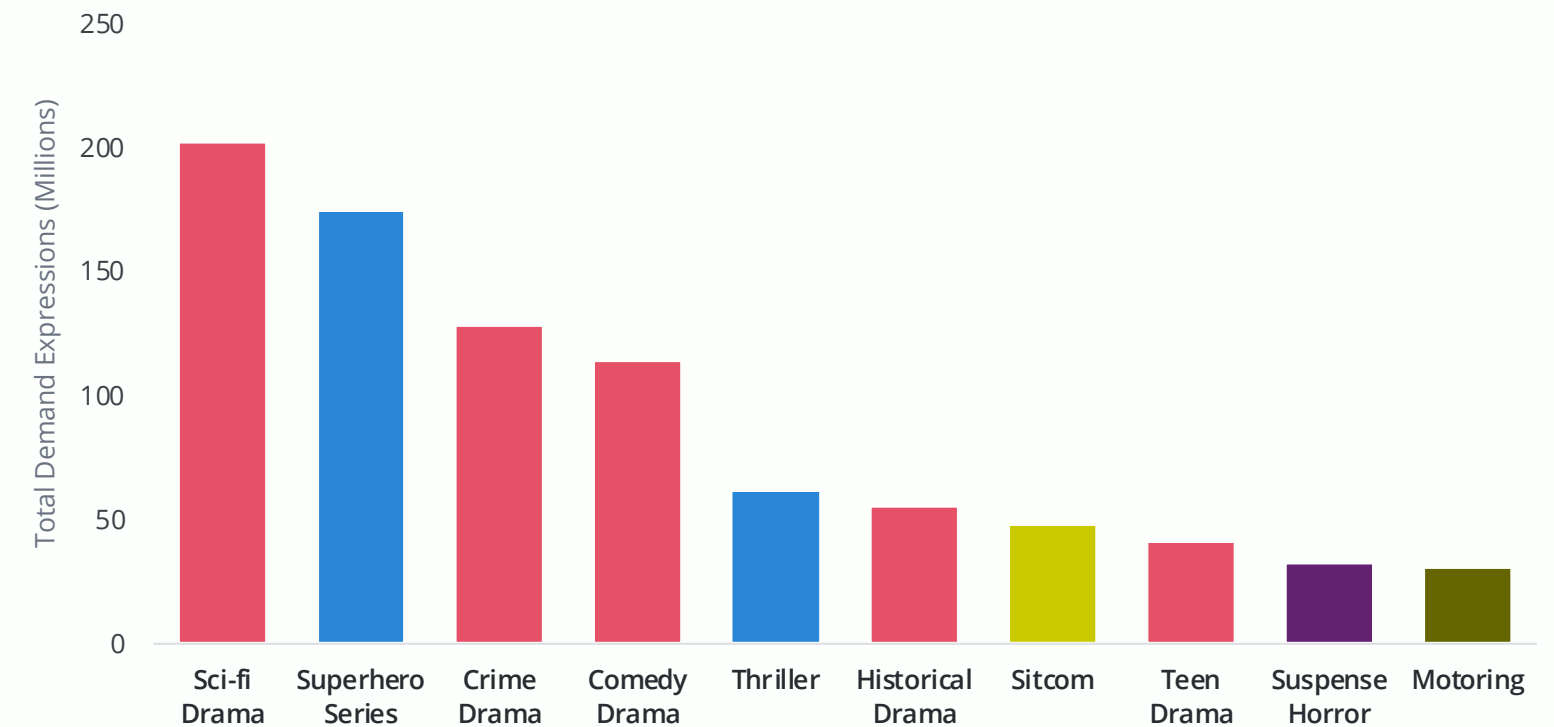
January – March, 2019

Belgium digital original series genre demand share (Q1 2019)



- With 53.3%, Belgian audiences have a higher demand share for digital original drama titles than any other market in this report.
- Belgians also have an above average demand share for action/adventure originals, which account for 16.9% of this market's demand.
- Balancing this, in Belgium audiences engage least with digital original children's content (2.3%) and animation content (2.4%).

The 10 most in-demand subgenres for digital originals in Belgium (Q1 2019)



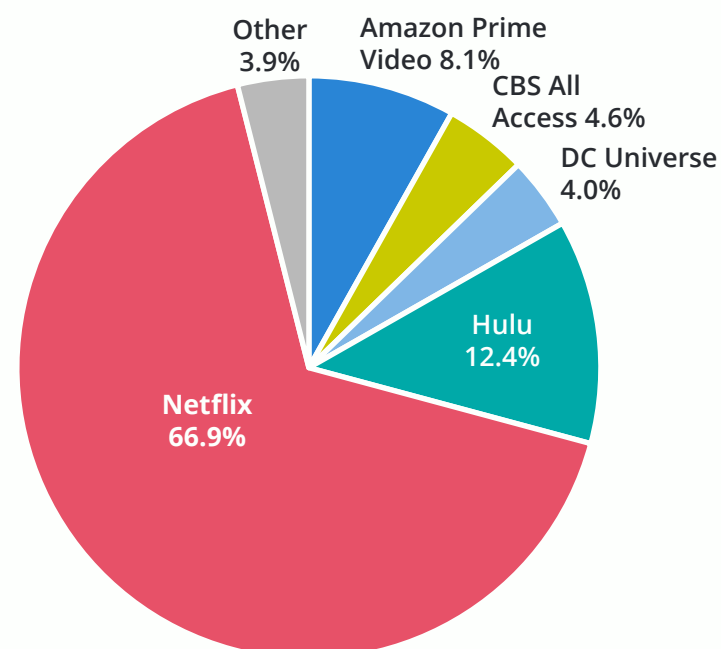
- Five of the most in-demand subgenres for digital original titles in Belgium are from the drama genre.
- The drama subgenre with the most demand in 2019 Q1 is sci-fi drama, which is also the largest overall subgenre.
- The most in-demand action/adventure subgenre is superhero series, which is the second largest subgenre in Belgium.

# Belgium platform demand share and digital originals demand distribution

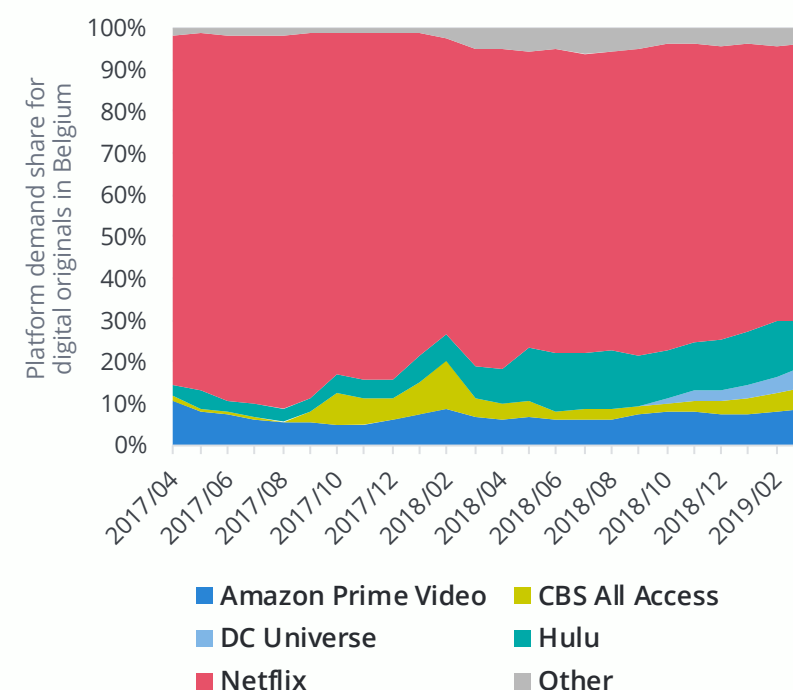
April, 2017 – March, 2019

## Belgium market demand share by original platform for all digital originals

Platform demand share (Q1 2019)



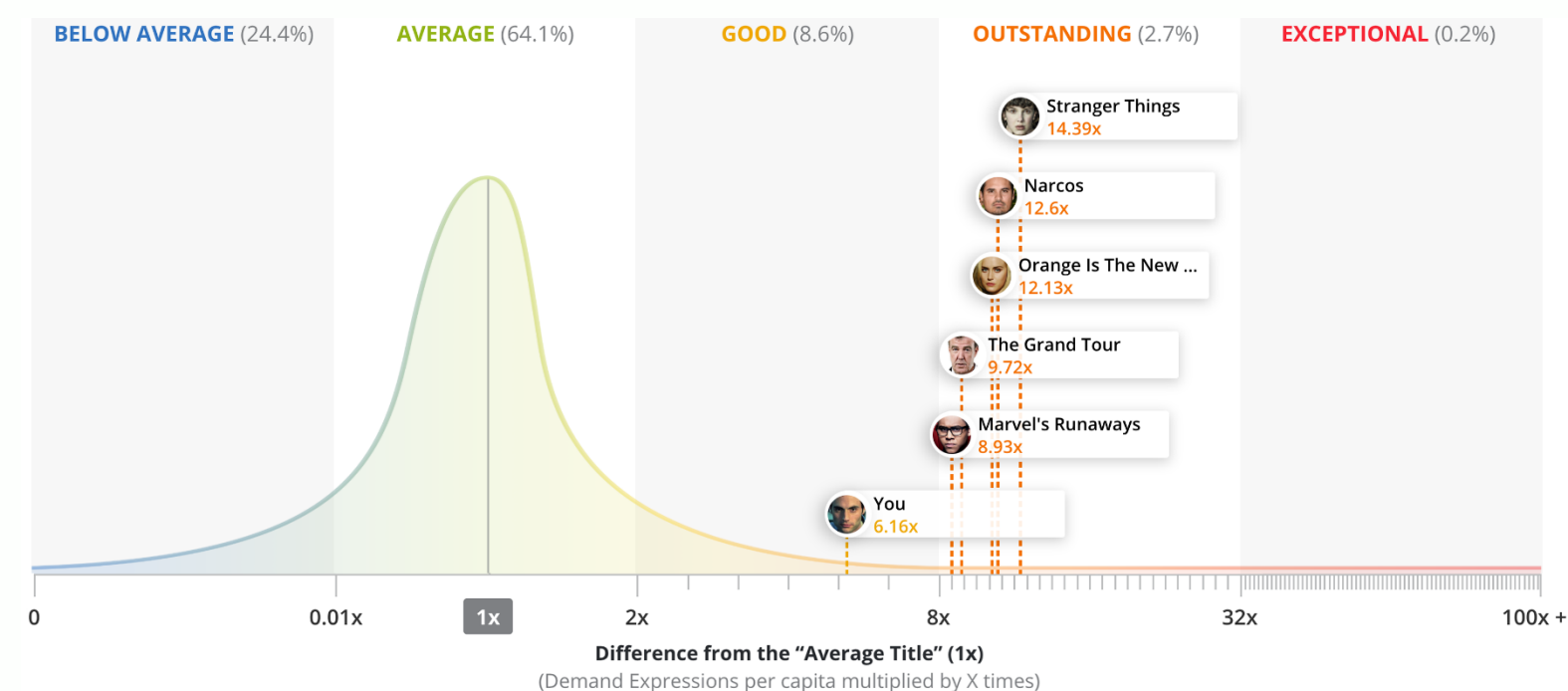
Platform demand share trend (24 months)



- In the Belgian digital original space, Netflix original titles have the largest share of demand. 66.9% of all demand expressed in 2019 Q1 was for a Netflix title.
- Hulu drama digital originals have a higher demand share in this market (12.4%) than all the other markets in this report.
- With 8.1%, Amazon Prime Video drama originals have the lowest demand share in Belgium of all the markets included in this report.
- The 24-month demand share trend shows that while the Amazon Prime Video's demand share has remained roughly the same, the share for Netflix has dipped since early 2018.

## Demand distribution of a selection of top digital originals in Belgium

Show position in Demand Distribution (Q1 2019)



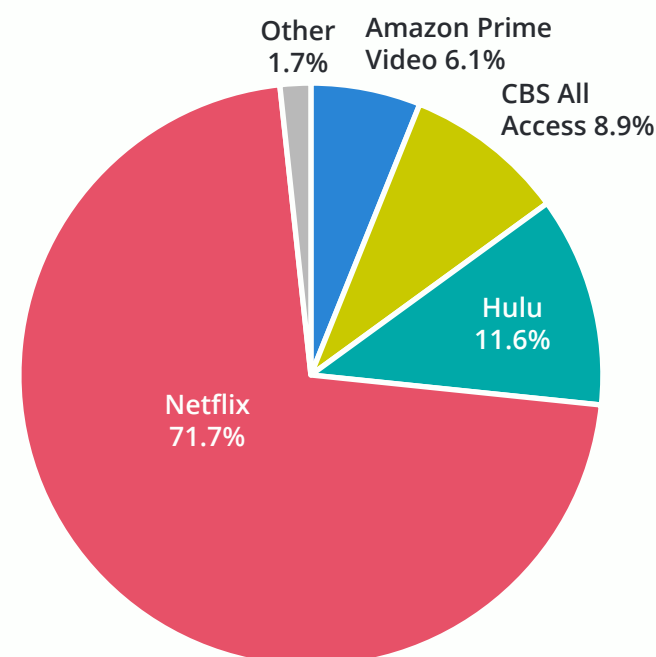
- The most in-demand digital original series in Belgium in 2019 Q1 is Netflix's **Stranger Things**.
- Demand for the Mexico season of crime drama **Narcos** is high in this market. It is the second most in-demand title, rated as 'Outstanding'.
- Hulu original **Marvel's Runaways** is also an 'Outstanding' title. Although Hulu does not operate in this market, the show is available on cable channel BeTV in Belgium.

# Belgium platform demand share for drama and action/adventure digital originals

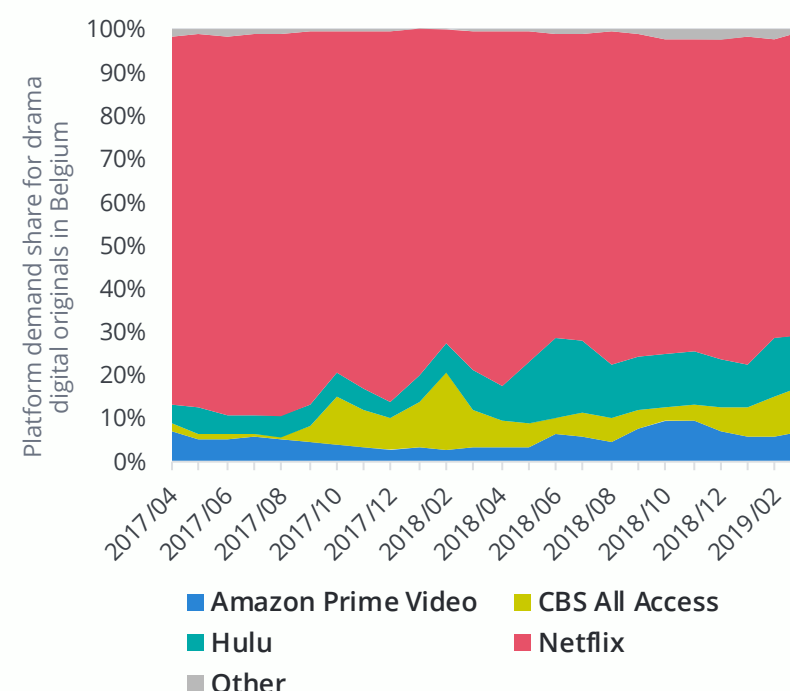
April, 2017 – March, 2019

## Belgium market demand share by original platform for drama digital originals

Platform drama demand share  
(Q1 2019)



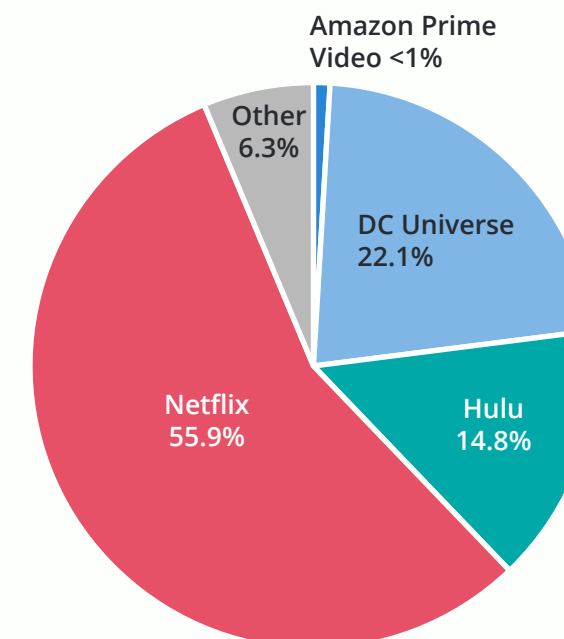
Platform demand share trend for drama  
(24 months)



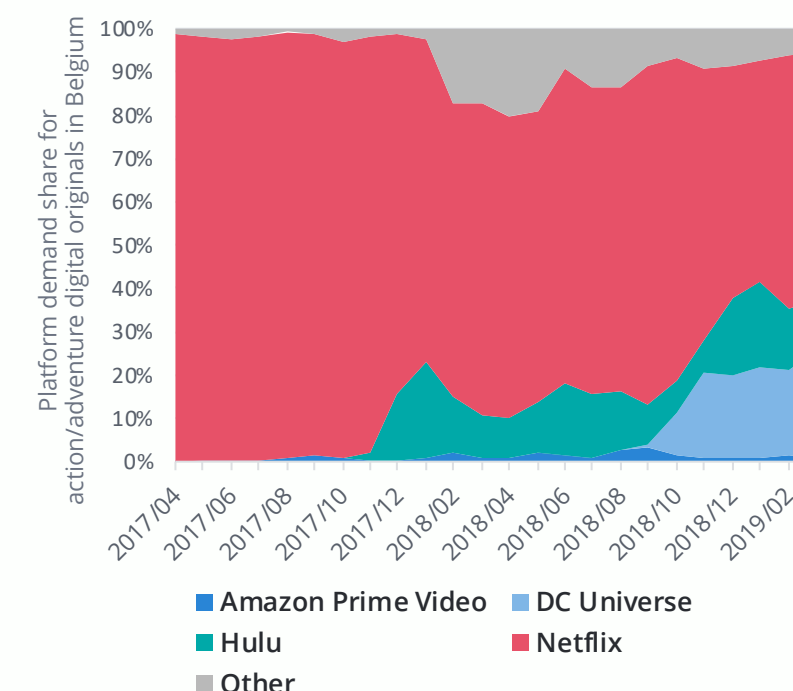
- The majority (71.7%) of the 2019 Q1 demand for drama titles in Belgium is expressed for digital original titles from Netflix, a higher share than in any other markets in this report.
- With a 11.6% demand share in Belgium, this is the also best market for Hulu drama originals.
- The Belgian enthusiasm for Netflix and Hulu titles comes at the expense of drama from Amazon Prime Video which only has a 6.1% demand share, lower than in all other markets in this report.
- The trend over time chart shows that the demand share for CBS All Access drama originals has increased over the quarter.

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

Platform action/adventure demand share  
(Q1 2019)



Platform demand share trend for  
action/adventure (24 months)



- Netflix originals account for 55.9% of Belgian demand for action/adventure digital originals.
- DC Universe titles have solidified themselves as the second largest share of demand with 22.1%, retaining the strong position they took at the end of 2018 in the action/adventure genre.
- The 24-month trend shows the market shift resulting from the entry of DC Universe originals; in Q1 the DC Universe share appears to still be increasing in Belgium.

# Top digital original series in Belgium

January – March, 2019

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

Series Name	In-Market Platform*	Original Platform	Genre	Average daily Demand Expressions (DEx) in Q1 2019	
1 <i>Stranger Things</i>	Netflix	Netflix	Drama	512,467	
2 <i>Narcos</i>	Netflix	Netflix	Drama	445,923	
3 <i>Orange Is The New Black</i>	Netflix	Netflix	Comedy	429,686	
4 <i>The Handmaid's Tale</i>	Proximus TV	Hulu	Drama	414,013	
5 <i>13 Reasons Why</i>	Netflix	Netflix	Drama	378,819	
6 <i>Star Trek: Discovery</i>	Netflix	CBS All Access	Drama	372,534	
7 <i>The Grand Tour</i>	Amazon Prime Video	Amazon Prime Video	Sports	344,438	
8 <i>The Umbrella Academy</i>	Netflix	Netflix	Action and Adventure	318,046	
9 <i>Marvel's Runaways</i>	Be TV	Hulu	Action and Adventure	316,797	
10 <i>La Casa De Papel (Money Heist)</i>	Netflix	Netflix	Drama	306,783	
11 <i>Black Mirror</i>	Netflix	Netflix	Drama	299,584	
12 <i>Marvel's The Punisher</i>	Netflix	Netflix	Action and Adventure	298,186	
13 <i>The Last Kingdom</i>	Netflix	Netflix	Drama	291,663	
14 <i>Castle Rock</i>	Be TV	Hulu	Horror	233,536	
15 <i>Marvel's Daredevil</i>	Netflix	Netflix	Action and Adventure	222,751	
16 <i>You</i>	Netflix	Netflix	Drama	217,406	
17 <i>Titans</i>	Netflix	DC Universe	Action and Adventure	208,154	
18 <i>A Series Of Unfortunate Events</i>	Netflix	Netflix	Drama	185,634	
19 <i>Doom Patrol</i>	--	DC Universe	Action and Adventure	167,416	
20 <i>House Of Cards</i>	Netflix	Netflix	Drama	157,041	

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

22 <i>Future Man</i>	Be TV	Hulu	Comedy	146,938	
34 <i>The Man In The High Castle</i>	Amazon Prime Video	Amazon Prime Video	Drama	143,201	
35 <i>Love Death And Robots</i>	Netflix	Netflix	Drama	102,403	
44 <i>Young Justice</i>	Netflix	DC Universe	Action and Adventure	93,980	
51 <i>Snatch</i>	--	Crackle	Drama	84,522	

\* Distributor for most recent season in case of multiple platforms

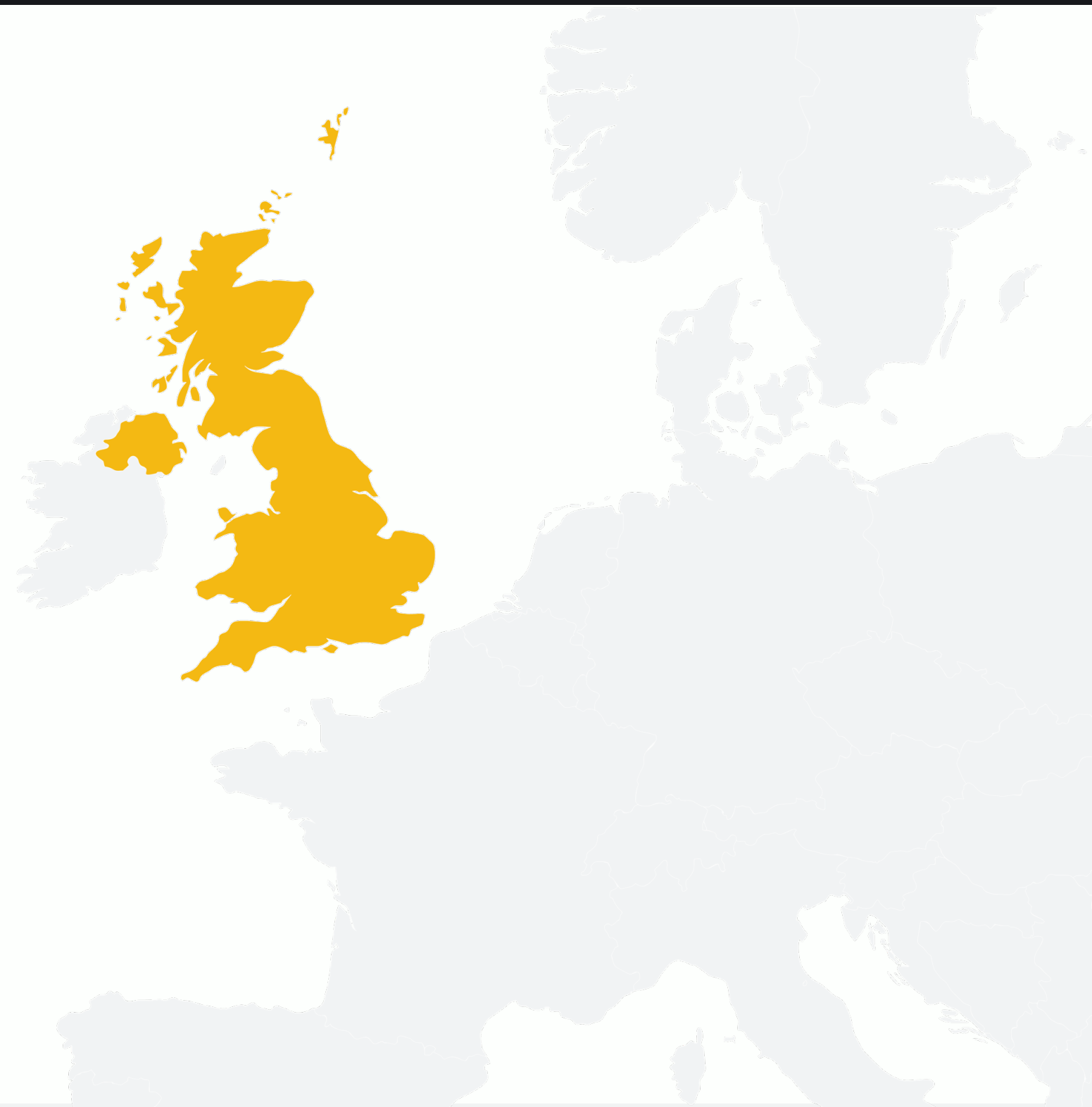
-- No platform information available, please refer to appendix

## Genre, subgenre, platform demand share and digital original trends

### United Kingdom

Learn which genres and subgenres of digital originals are most demanded by British audiences. Discover the demand share of the leading SVOD platforms over the past 24 months and explore demand for the top streaming originals.

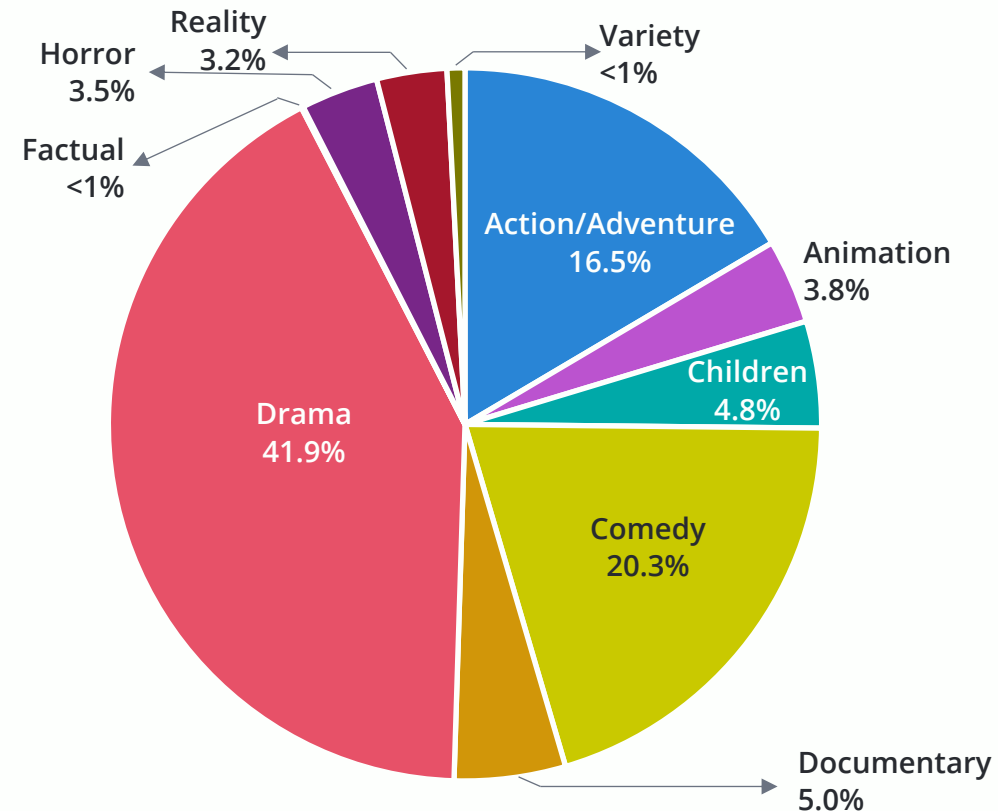
NOTE: The insights presented in this section are based on the entire available Parrot Analytics globalTV demand dataset, which is comprised of 3.5 trillion data points across 100+ languages in 100+ countries.



# United Kingdom digital original genre and subgenre preferences

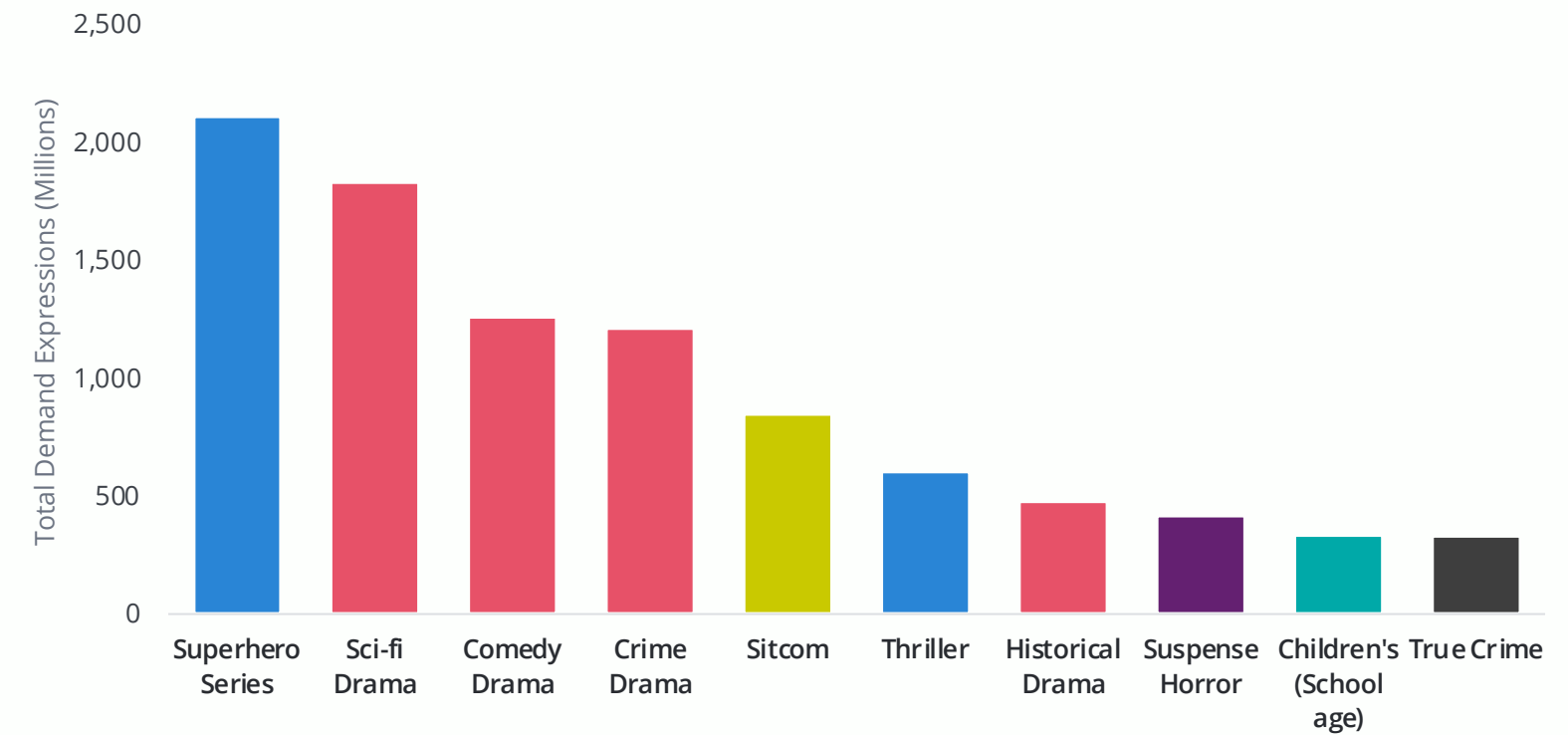
January – March, 2019

United Kingdom digital original series genre demand share (Q1 2019)



- With 5.0% of the market demand share, the UK is the market in this report where digital original documentaries perform best.
- British audiences also have an above average demand share for reality originals, which represent 3.2% of the market's Q1 demand.
- With only 3.8% demand share, the UK animation genre share is small compared to most other markets in this report.

The 10 most in-demand subgenres for digital originals in the United Kingdom (Q1 2019)



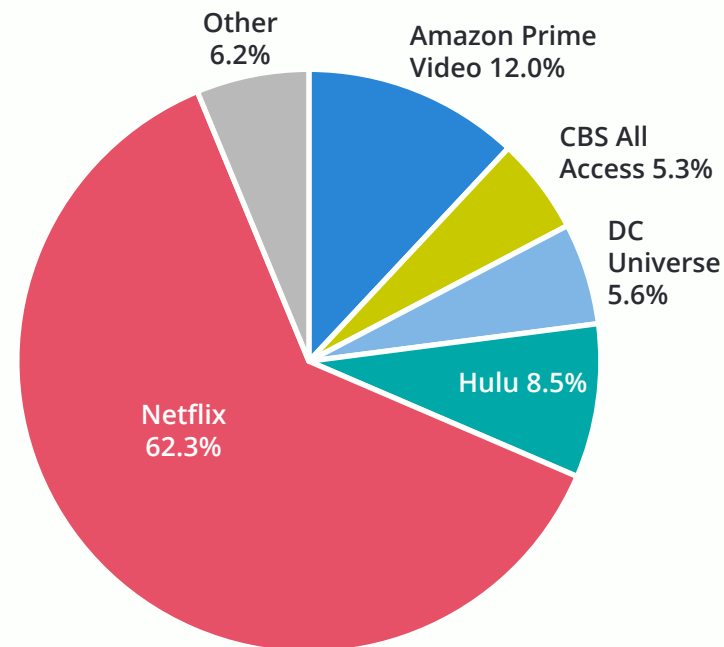
- The subgenre with the most demand from digital original titles in this quarter is superhero series.
- The UK's high demand for digital original documentary titles shows in this chart as well: The UK is the only market in this report that has a documentary subgenre as one of its largest subgenres. True crime is the 10th largest subgenre by total demand.

# United Kingdom platform demand share and digital originals demand distribution

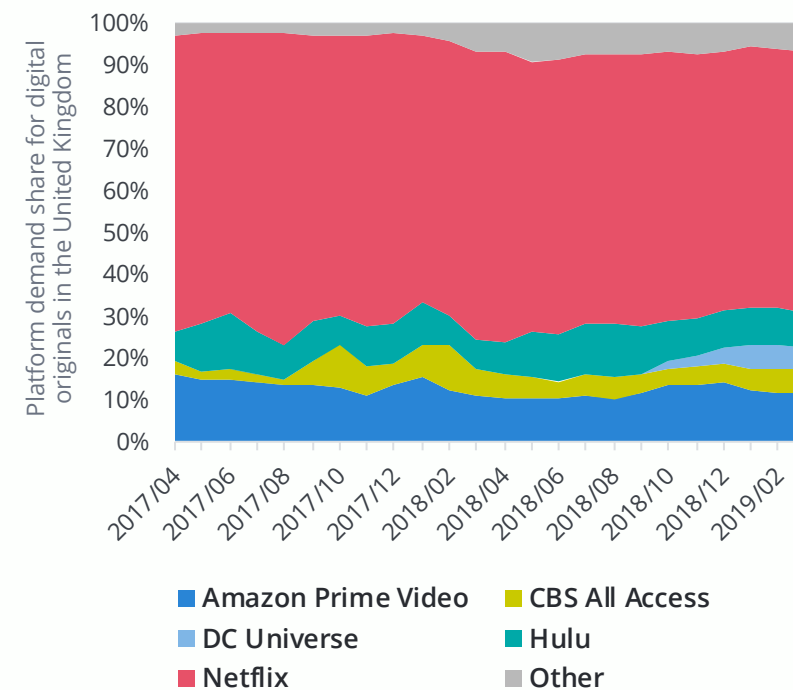
April, 2017 – March, 2019

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

Platform demand share (Q1 2019)



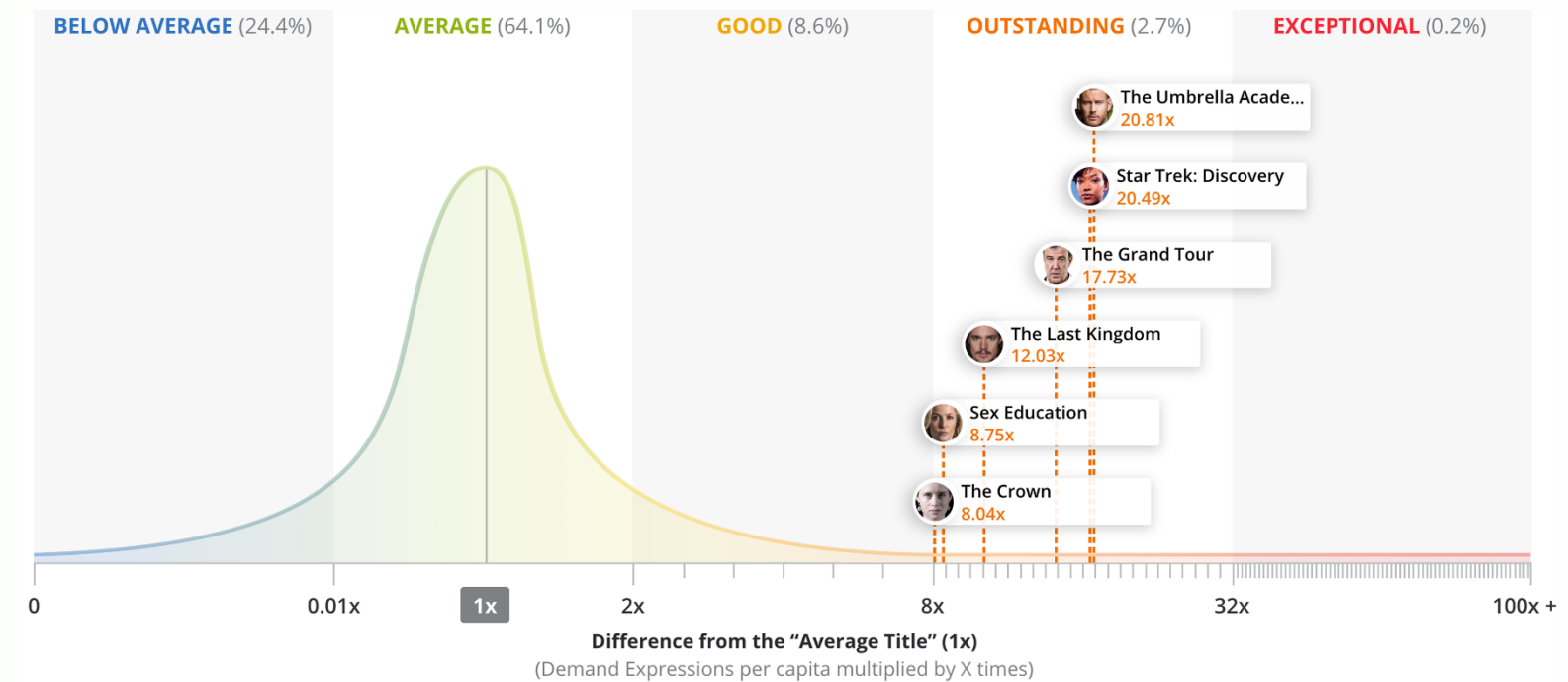
Platform demand share trend (24 months)



- The UK has a higher demand share than all the other markets in this report for DC Universe titles. 5.6% of expressed demand in 2019 Q1 over all genres was for a DC Universe original.
- With 62.3%, Netflix originals account for the majority of UK demand. However, this is a lower demand share than in most markets.
- Compared to other markets in this report, the platform demand share trends in this market have been relatively stable over the quarter.

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

Show position in Demand Distribution (Q1 2019)

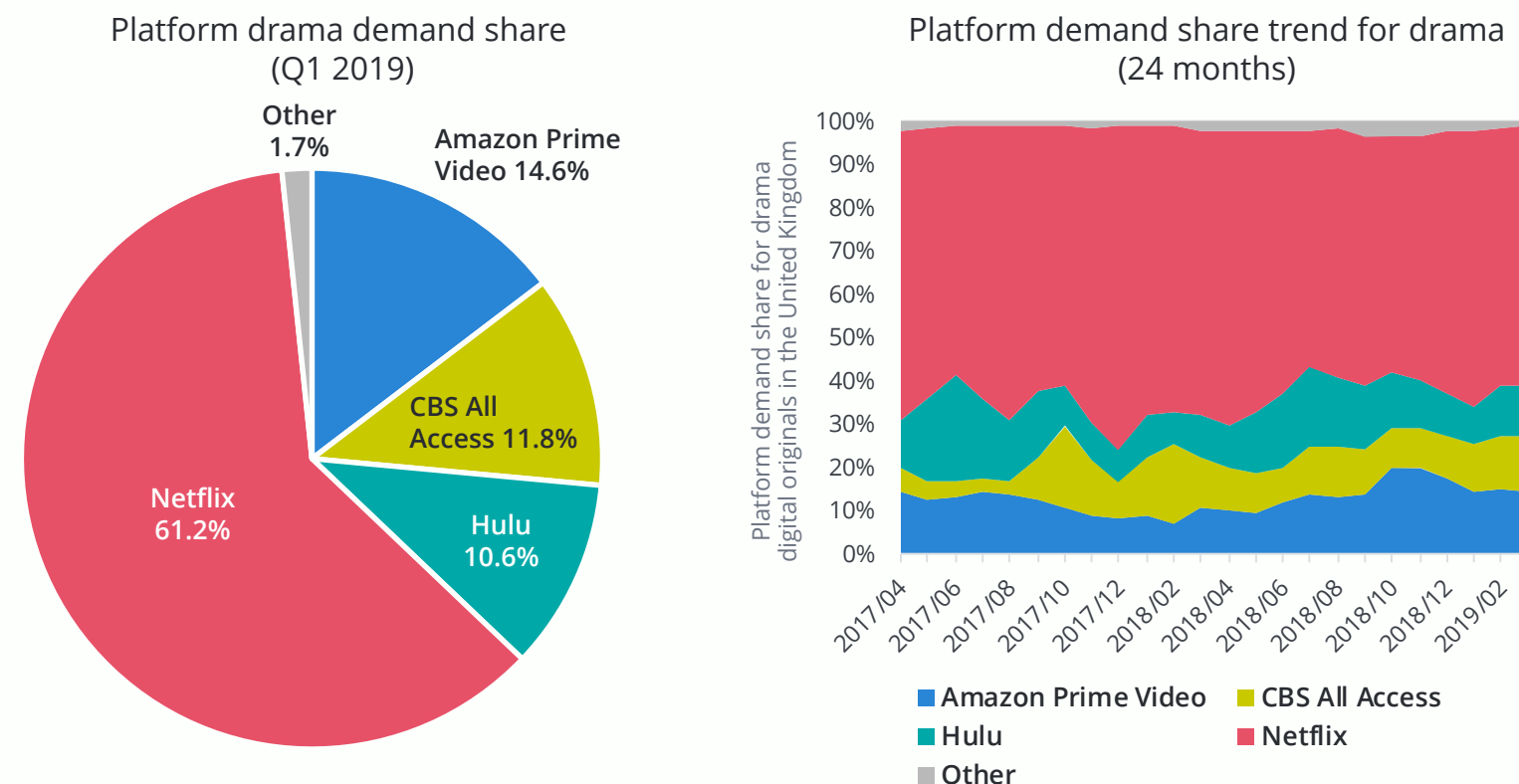


- The most in-demand digital original series in the United Kingdom in Q1 2019 is Netflix's **The Umbrella Academy**. It has 20.8 times more demand than the average title, making it one of the 2.7% of titles that are classed as 'Outstanding'.
- British original **The Last Kingdom** has high demand in this market; the title was formerly a non-digital original BBC America production before Netflix acquired the show entirely for season 3.
- Other British digital originals with high demand in the market include **The Grand Tour** from Amazon Prime Video and **Black Mirror**, **Sex Education** and **The Crown** from Netflix.

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

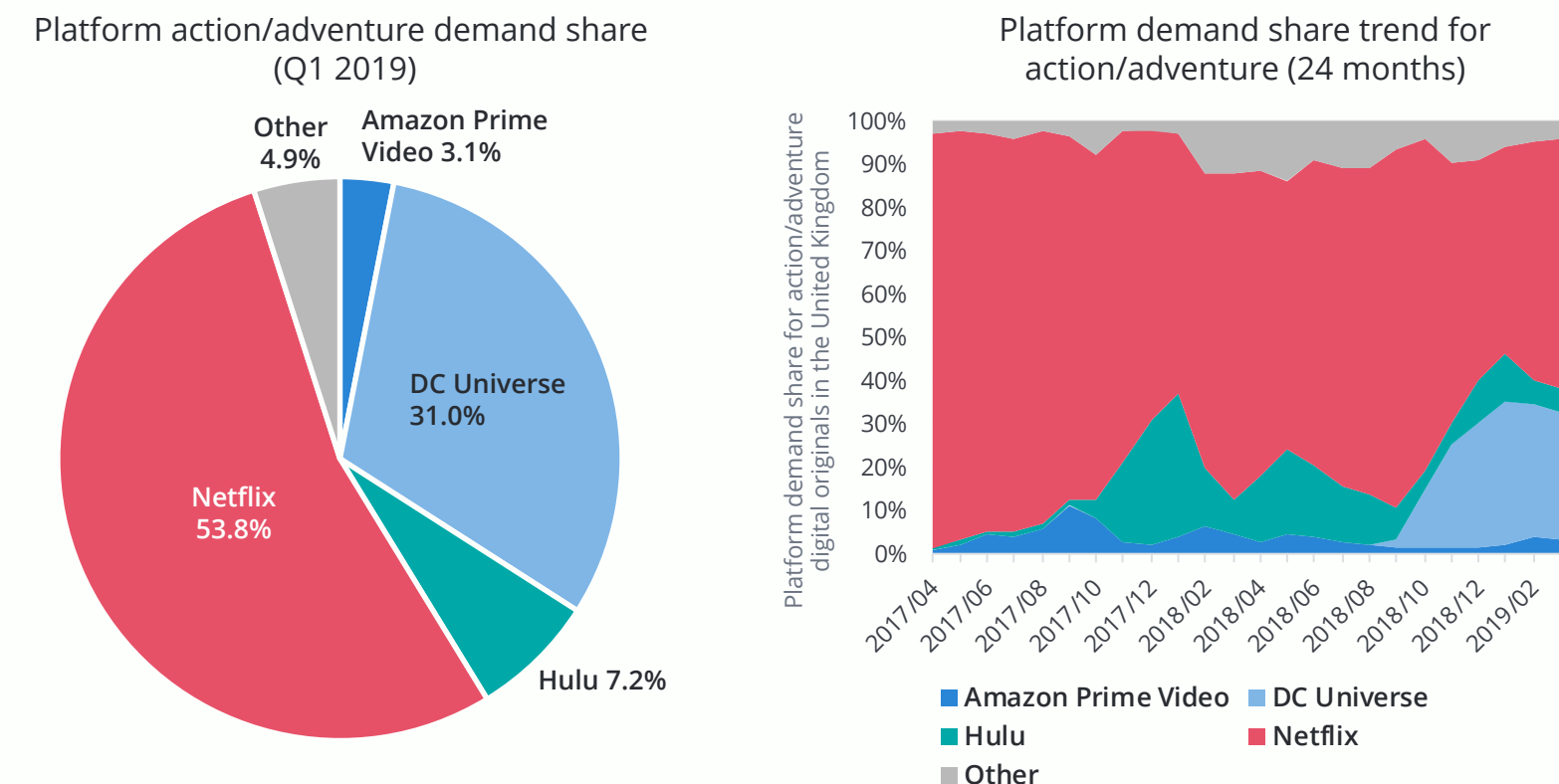
April, 2017 – March, 2019

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



- Netflix titles account for 61.2% of all demand expressed for digital original drama titles in the United Kingdom in 2019 Q1.
- Amazon Prime Video titles have the second largest demand share for drama titles in the market with 14.6%, while CBS All Access originals have the third largest share accounting for 11.8%.
- The 24 month view shows how Netflix has managed to retain a more or less stable level of drama demand share across the past 2 years.

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



- Netflix has the largest action/adventure demand share in the United Kingdom with 53.8%, although the trend chart shows how this has decreased markedly from its position in mid-2018.
- Action/adventure DC Universe originals are the second largest segment in this market.
- DC Universe originals have a 31.0% average demand share over 2019 Q1, peaking at 33.4% of the market in January.

# Top digital original series in the United Kingdom

January – March, 2019

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

Series Name	In-Market Platform*	Original Platform	Genre	Average daily Demand Expressions (DEx) in Q1 2019	
1 <i>The Umbrella Academy</i>	Netflix	Netflix	Action and Adventure	4,306,113	
2 <i>Star Trek: Discovery</i>	Netflix	CBS All Access	Drama	4,180,740	
3 <i>Stranger Things</i>	Netflix	Netflix	Drama	3,781,614	
4 <i>The Grand Tour</i>	Amazon Prime Video	Amazon Prime Video	Sports	3,616,614	
5 <i>Titans</i>	Netflix	DC Universe	Action and Adventure	3,597,607	
6 <i>The Handmaid's Tale</i>	Channel 4	Hulu	Drama	3,294,576	
7 <i>Marvel's Daredevil</i>	Netflix	Netflix	Action and Adventure	3,119,842	
8 <i>Marvel's The Punisher</i>	Netflix	Netflix	Action and Adventure	2,997,540	
9 <i>You</i>	Netflix	Netflix	Drama	2,806,548	
10 <i>Black Mirror</i>	Netflix	Netflix	Drama	2,802,296	
11 <i>Narcos</i>	Netflix	Netflix	Drama	2,569,893	
12 <i>The Last Kingdom</i>	Netflix	Netflix	Drama	2,446,600	
13 <i>Orange Is The New Black</i>	Netflix	Netflix	Comedy	2,234,077	
14 <i>Doom Patrol</i>	--	DC Universe	Action and Adventure	2,144,084	
15 <i>Young Justice</i>	--	DC Universe	Action and Adventure	2,007,048	
16 <i>Marvel's Runaways</i>	Syfy	Hulu	Action and Adventure	1,850,742	
17 <i>Sex Education</i>	Netflix	Netflix	Comedy	1,773,197	
18 <i>The Marvelous Mrs. Maisel</i>	Amazon Prime Video	Amazon Prime Video	Comedy	1,730,459	
19 <i>The Man In The High Castle</i>	Amazon Prime Video	Amazon Prime Video	Drama	1,661,226	
20 <i>The Crown</i>	Netflix	Netflix	Drama	1,636,398	

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

22 <i>A Series Of Unfortunate Events</i>	Netflix	Netflix	Drama	1,528,649	
34 <i>Russian Doll</i>	Netflix	Netflix	Comedy	1,527,733	
35 <i>Castle Rock</i>	STARZPLAY	Hulu	Horror	1,462,471	
44 <i>Future Man</i>	Syfy	Hulu	Comedy	1,444,130	
51 <i>Cobra Kai</i>	YouTube Premium	YouTube Premium	Comedy	1,294,069	

\* Distributor for most recent season in case of multiple platforms

-- No platform information available, please refer to appendix

## Genre, subgenre, platform demand share and digital original trends

### Hungary

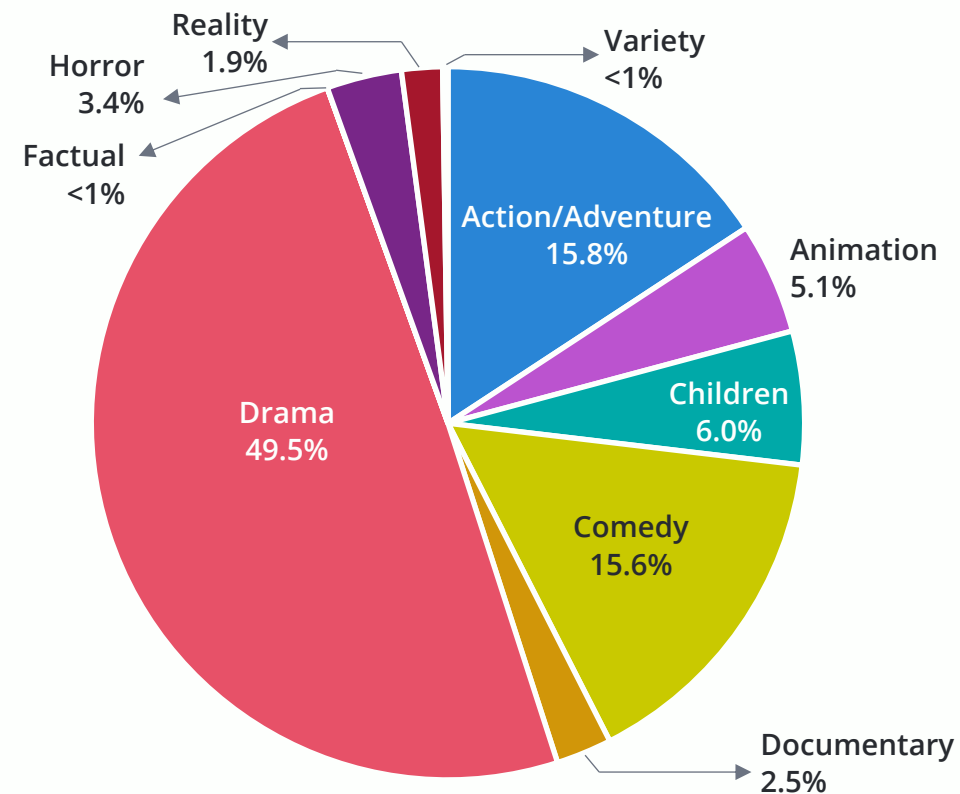
Learn which genres and subgenres of digital originals are most demanded by Hungarian audiences. Discover the demand share of the leading SVOD platforms over the past 24 months and explore demand for the top streaming originals.

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

# Hungary digital original genre and subgenre preferences

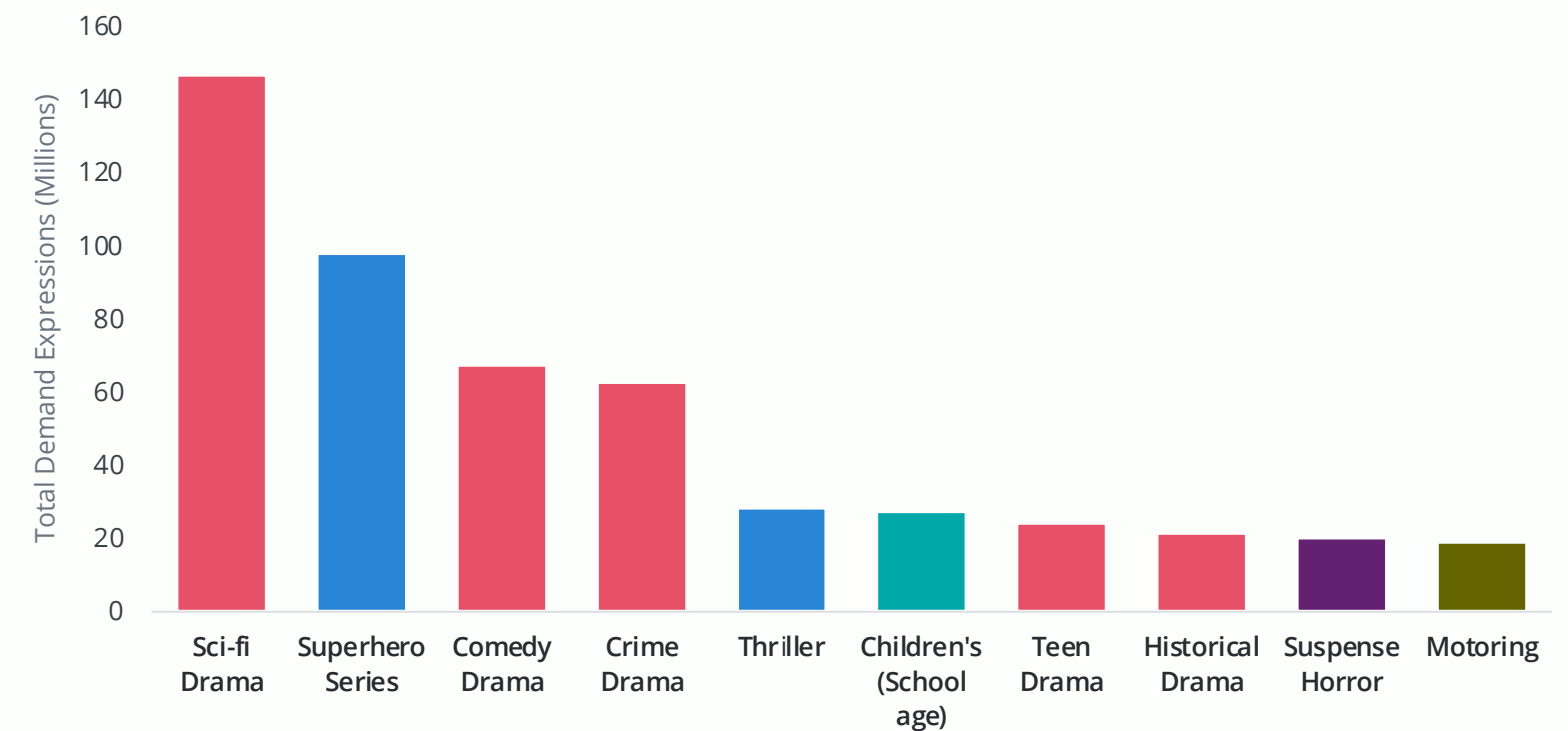
January – March, 2019

Hungary digital original series genre demand share (Q1 2019)



- Hungary has above average demand for drama digital originals, 49.5% of demand expressed in Q1 was for an original in this genre.
- Of all the markets analysed, the demand share for comedy originals is smallest here with a share of only 15.6%.
- The shares for other genres is overall in line with the average across the markets analysed in this report.

The 10 most in-demand subgenres for digital originals in Hungary (Q1 2019)



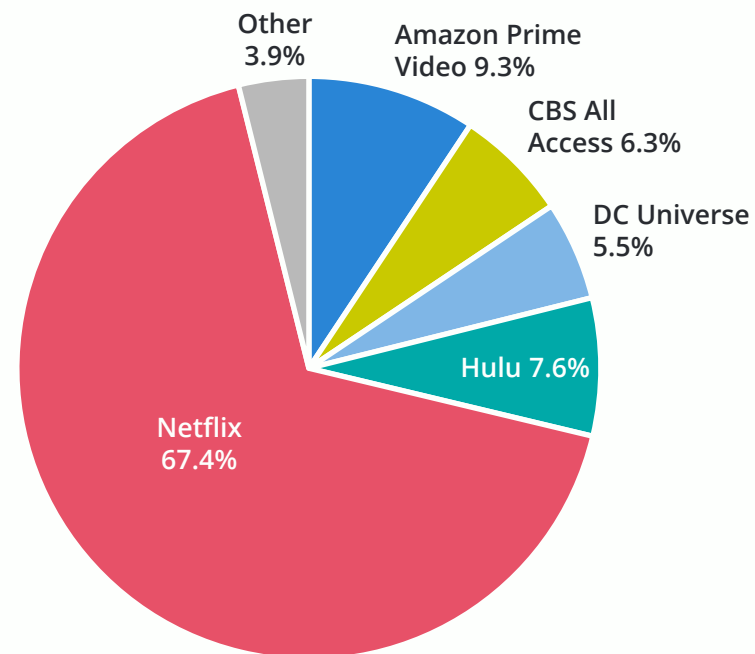
- Once again we find sci-fi drama and superhero series at the top of the chart with the most demand.
- The teen drama subgenre is the seventh largest in this market, the highest placement in the report.
- Hungary's top subgenre has the largest lead on the next biggest subgenre in this report, after Russia. In this market, sci-fi drama has 50% more demand in the quarter than superhero titles.

# Hungary platform demand share and digital originals demand distribution

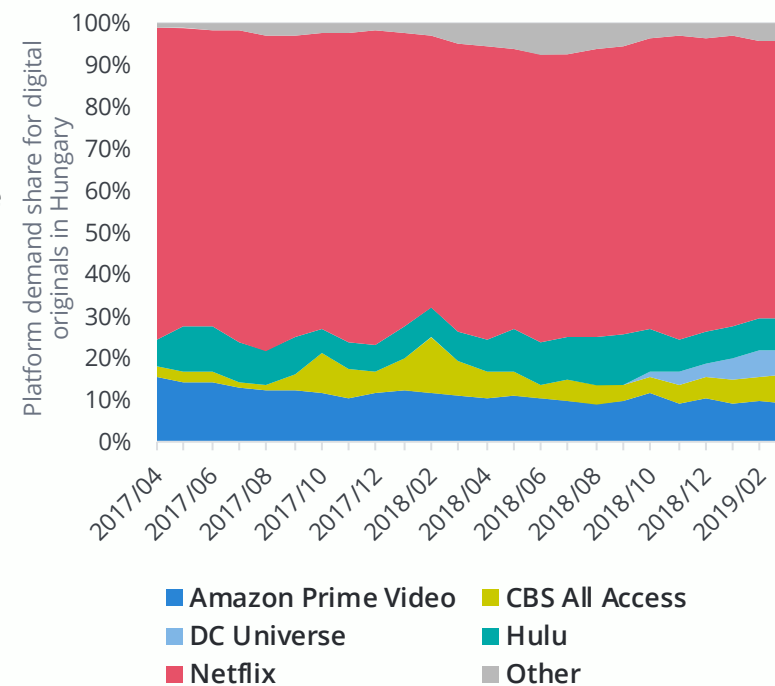
April, 2017 – March, 2019

## Hungary market demand share by original platform for all digital originals

Platform demand share (Q1 2019)



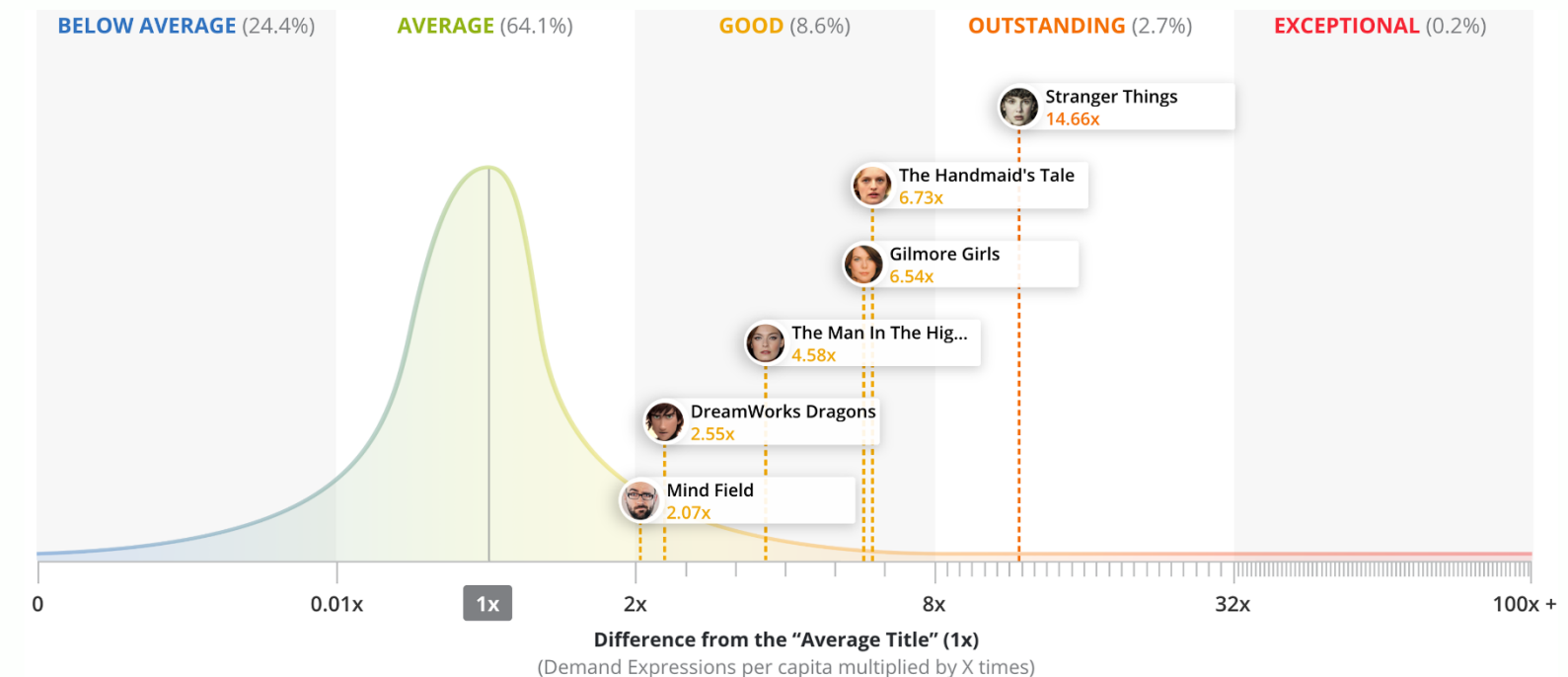
Platform demand share trend (24 months)



- The largest share of demand for digital original titles in Hungary is for Netflix Originals, which account for 67.4% of demand in the quarter.
- Compared to other markets in this report, Hungary has an above average demand share for both CBS All Access originals (6.3%) and DC Universe originals (5.5%).
- The long term trend chart shows that the Netflix demand share has been slowly declining in the most recent 3 months.

## Demand distribution of a selection of top digital originals in Hungary

Show position in Demand Distribution (Q1 2019)



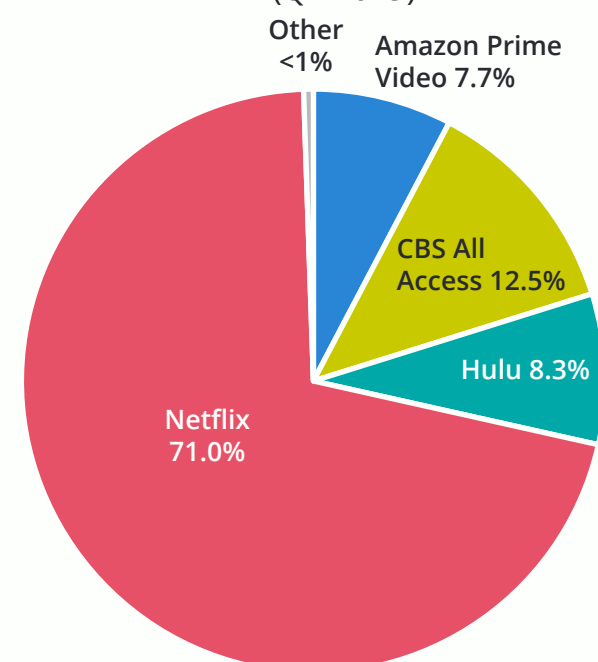
- The most in-demand digital original series in Hungary in 2019 Q1 is Netflix's **Stranger Things**.
- Amazon Prime Video's **The Man In The High Castle** ranks highly in many markets, but in the included markets it places highest in Hungary.
- Some other titles that rank highly in Hungary include YouTube Premium's **Mind Field** and Netflix's **DreamWorks Dragons**.

# Hungary platform demand share for drama and action/adventure digital originals

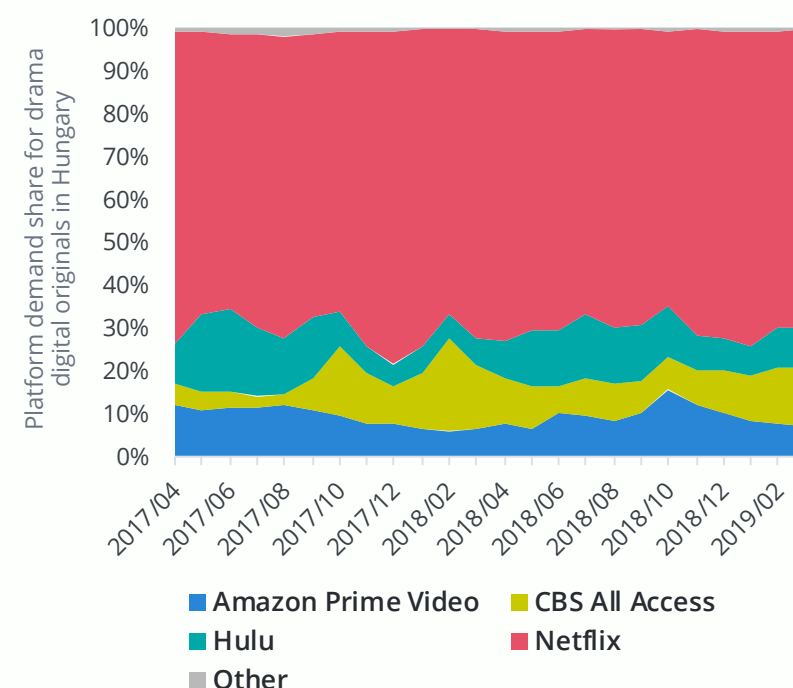
April, 2017 – March, 2019

## Hungary market demand share by original platform for drama digital originals

Platform drama demand share (Q1 2019)



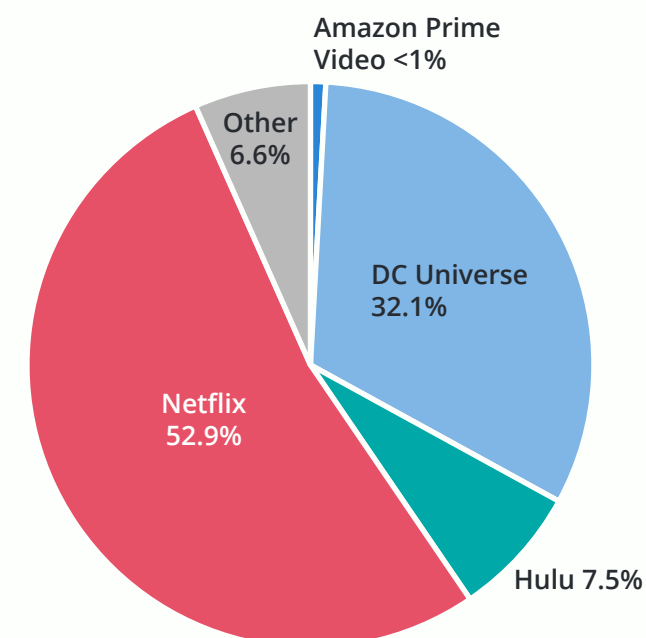
Platform demand share trend for drama (24 months)



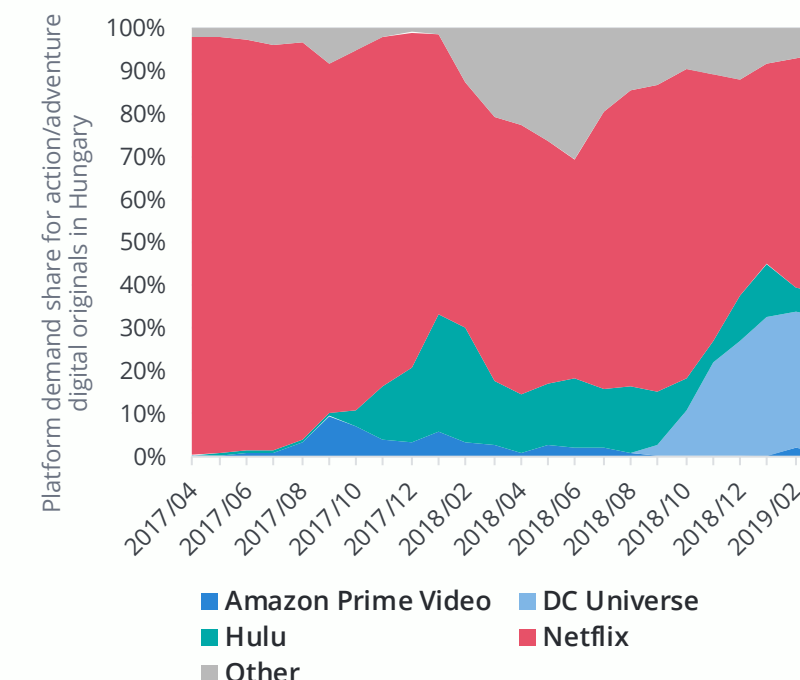
- The largest demand share for drama digital originals in 2019 Q1 is for Netflix titles with 71.0%, around 4% higher than the Netflix share for all genres in this market.
- The second largest digital original drama demand share is for titles from CBS All Access, which have a 12.5% demand share in Hungary.
- The 24 month trend chart shows that the demand share for CBS All Access drama originals grew over 2019 Q1 from 10.8% in January to 13.9% in March.

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

Platform action/adventure demand share (Q1 2019)



Platform demand share trend for action/adventure (24 months)



- For the action/adventure genre in Hungary, Netflix originals have a 52.7% demand share in 2019 Q1.
- Originals from DC Universe have the second largest demand share with 32.1%.
- The 24 month trend shows how the arrival of DC Universe action/adventure originals has impacted the market, although recently their demand share has stabilised.

# Top digital original series in Hungary

January – March, 2019

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

Series Name	In-Market Platform*	Original Platform	Genre	Average daily Demand Expressions (DEx) in Q1 2019	
1 <i>Stranger Things</i>	Netflix	Netflix	Drama	450,196	
2 <i>Narcos</i>	Netflix	Netflix	Drama	342,202	
3 <i>Black Mirror</i>	Netflix	Netflix	Drama	331,352	
4 <i>Star Trek: Discovery</i>	Netflix	CBS All Access	Drama	317,398	
5 <i>The Grand Tour</i>	Amazon Prime Video	Amazon Prime Video	Sports	212,628	
6 <i>The Handmaid's Tale</i>	HBO Go	Hulu	Drama	206,261	
7 <i>Gilmore Girls</i>	Netflix	Netflix	Comedy	200,966	
8 <i>13 Reasons Why</i>	Netflix	Netflix	Drama	196,606	
9 <i>The Umbrella Academy</i>	Netflix	Netflix	Action and Adventure	179,666	
10 <i>Marvel's The Punisher</i>	Netflix	Netflix	Action and Adventure	174,912	
11 <i>Marvel's Daredevil</i>	Netflix	Netflix	Action and Adventure	151,973	
12 <i>Titans</i>	Netflix	DC Universe	Action and Adventure	149,249	
13 <i>The Man In The High Castle</i>	Amazon Prime Video	Amazon Prime Video	Drama	140,802	
14 <i>Orange Is The New Black</i>	Netflix	Netflix	Comedy	131,373	
15 <i>The Last Kingdom</i>	Netflix	Netflix	Drama	126,844	
16 <i>House Of Cards</i>	Netflix	Netflix	Drama	125,613	
17 <i>Doom Patrol</i>	--	DC Universe	Action and Adventure	124,021	
18 <i>Chilling Adventures Of Sabrina</i>	Netflix	Netflix	Horror	122,739	
19 <i>BoJack Horseman</i>	Netflix	Netflix	Animation	112,220	
20 <i>Young Justice</i>	Netflix	DC Universe	Action and Adventure	110,271	

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

21 <i>Love Death And Robots</i>	Netflix	Netflix	Drama	110,144	
23 <i>The Marvelous Mrs. Maisel</i>	Amazon Prime Video	Amazon Prime Video	Comedy	100,416	
24 <i>You</i>	Netflix	Netflix	Drama	95,082	
28 <i>DreamWorks Dragons</i>	Netflix	Netflix	Children	78,022	
35 <i>Mind Field</i>	YouTube Premium	YouTube Premium	Reality	63,428	

\* Distributor for most recent season in case of multiple platforms

-- No platform information available, please refer to appendix

## Genre, subgenre, platform demand share and digital original trends

### Ireland

Learn which genres and subgenres of digital originals are most demanded by Irish audiences. Discover the demand share of the leading SVOD platforms over the past 24 months and explore demand for the top streaming originals.

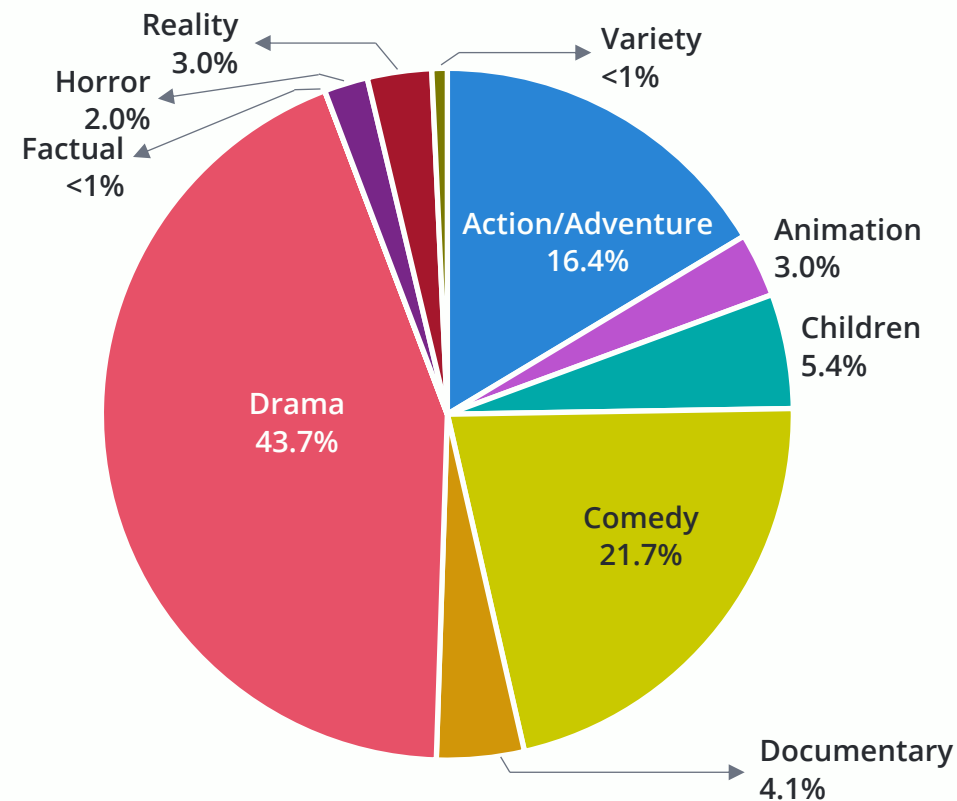
NOTE: The insights presented in this section are based on the entire available Parrot Analytics globalTV demand dataset, which is comprised of 3.5 trillion data points across 100+ languages in 100+ countries.



# Ireland digital original genre and subgenre preferences

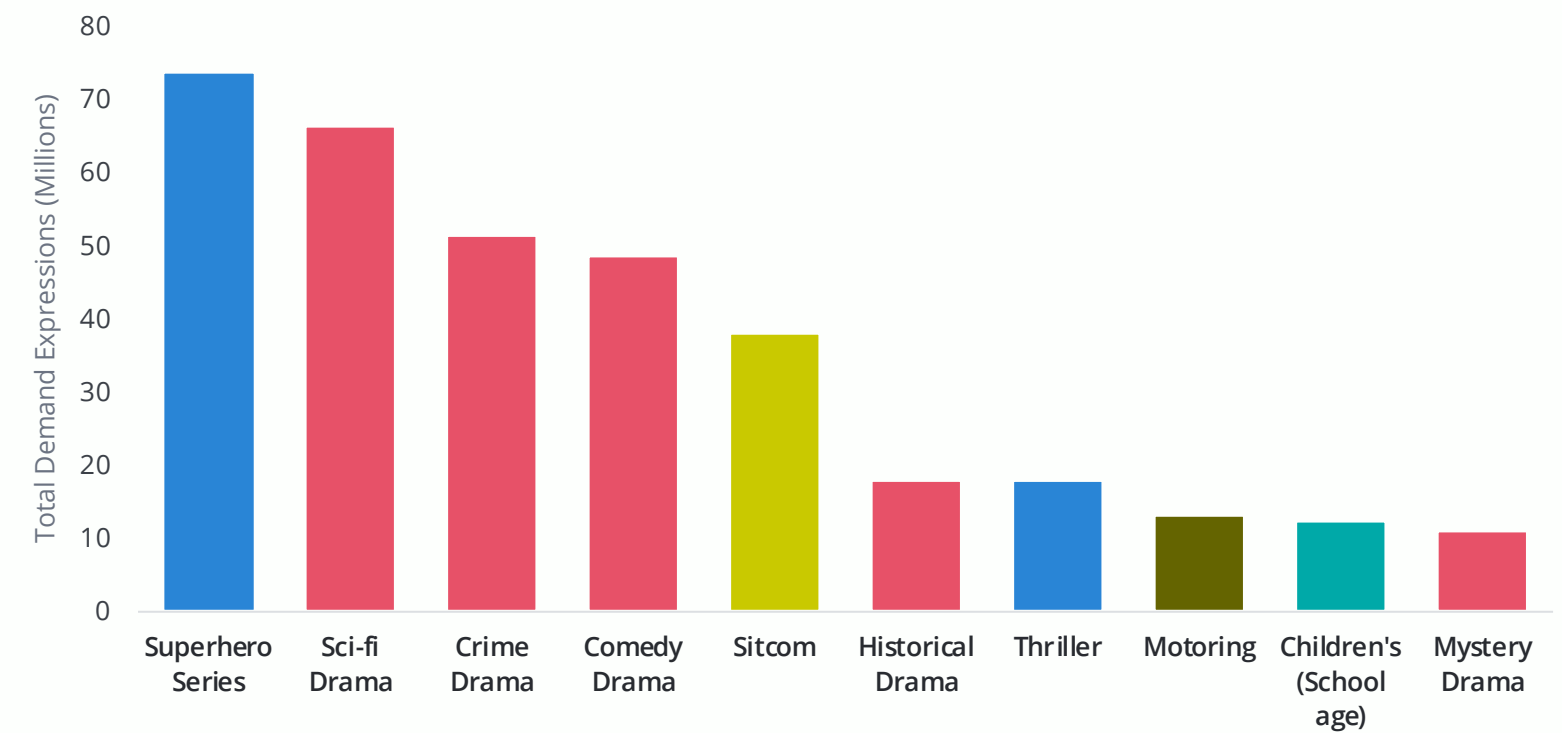
January – March, 2019

Ireland market demand share by original platform for all digital originals (Q1 2019)



- Ireland has the second highest demand share of markets in this report for comedy originals. 21.7% of expressed demand in 2019 Q1 was for a comedy digital original title.
- Ireland has an above average share for digital original reality titles, which have 3.0% demand share in this market.
- However, Irish audiences are least likely to engage with original horror titles; the genre only has 2.0% demand share here.

The 10 most in-demand subgenres for digital originals in Ireland (Q1 2019)



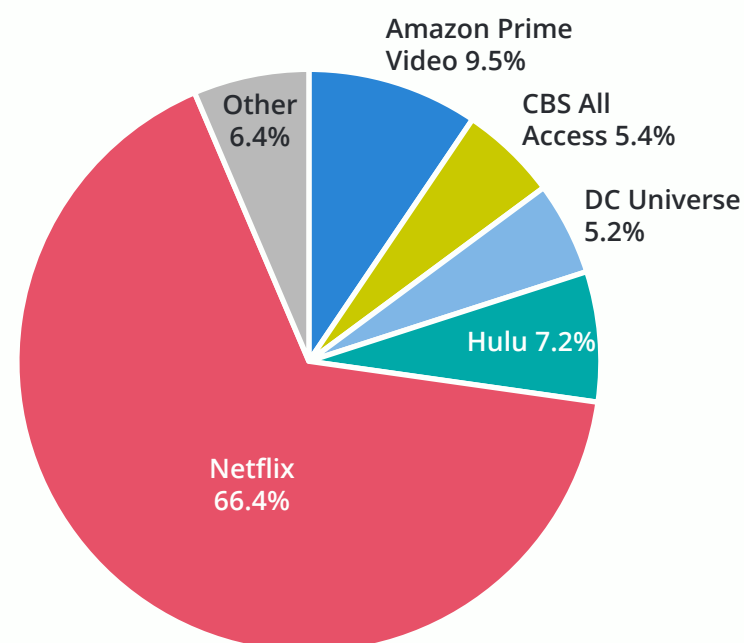
- Of Ireland's largest subgenres, five are from the drama genre. The drama subgenre with the highest total demand from digital original titles in the quarter is sci-fi drama.
- However, sci-fi drama is not the subgenre with most overall demand, that is the action/adventure superhero series.
- Motoring is the only variety subgenre that appears in this chart across the markets in this report. Reaching 8<sup>th</sup> largest, the motoring subgenre ranks highest here in Ireland.

# Ireland platform demand share and digital originals demand distribution

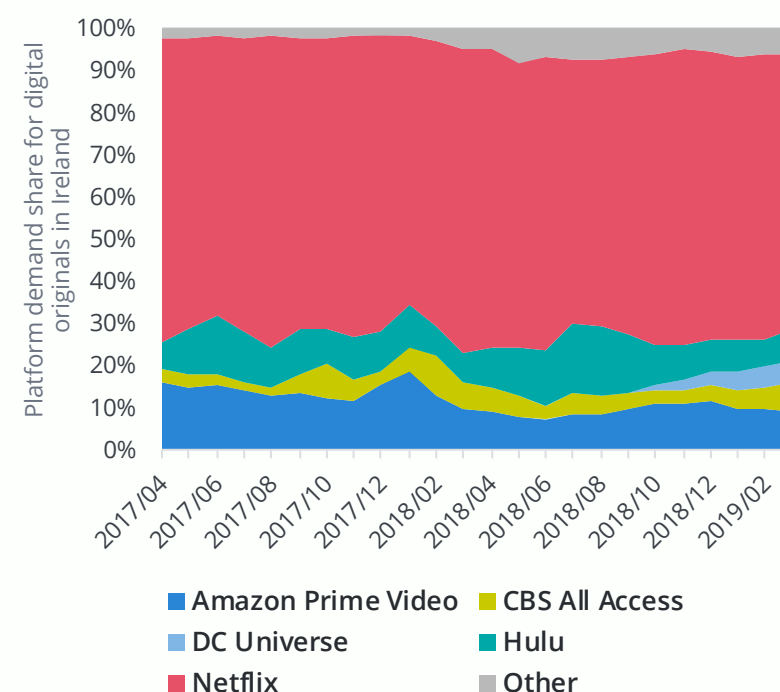
April, 2017 – March, 2019

## Ireland market demand share by original platform for all digital originals

Platform demand share (Q1 2019)



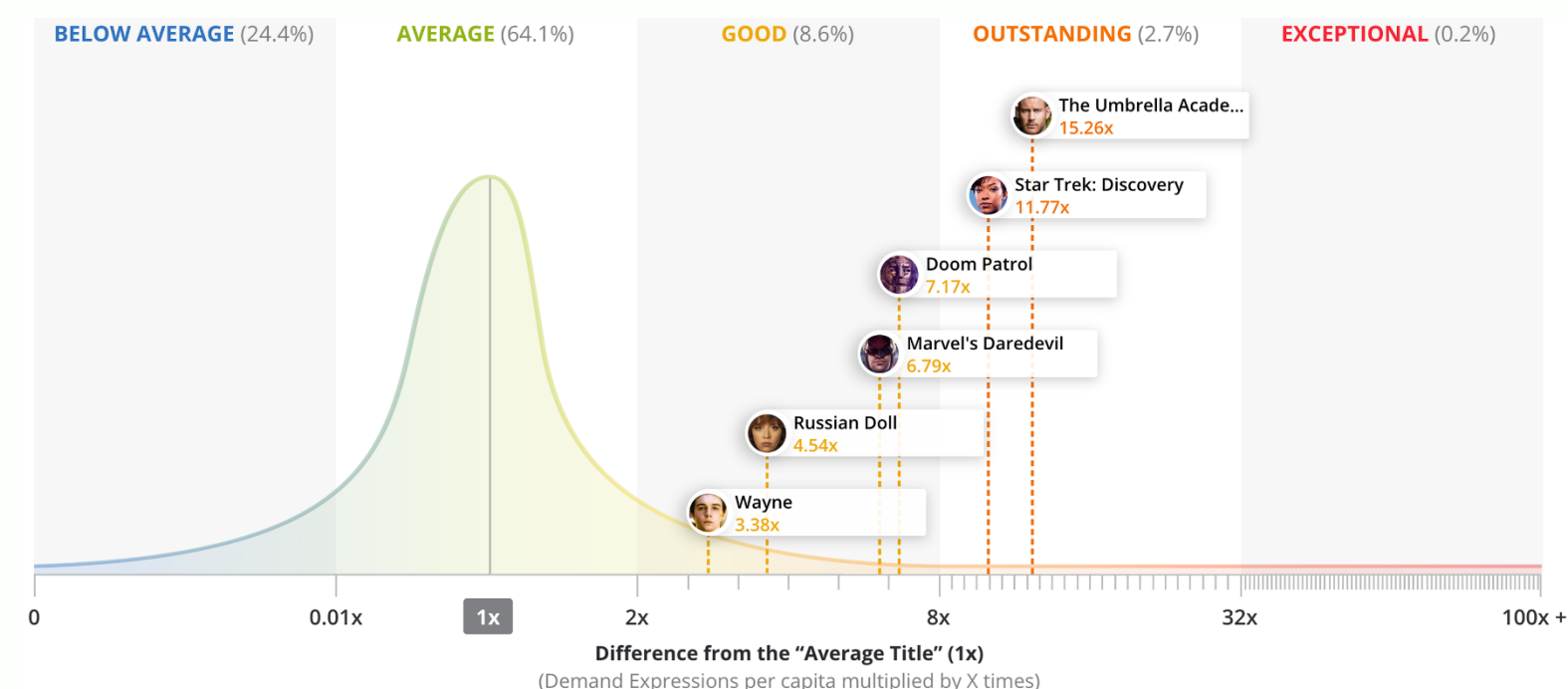
Platform demand share trend (24 months)



- With 7.2% demand share for 2019 Q1, Hulu titles have the lowest share in Ireland out of all the markets in this report.
- Like the UK, Ireland has an above average demand share for DC Universe originals with 5.2%.
- The 24 month trend chart shows that the share for Hulu titles are shrinking during 2019 Q1, while the shares for CBS All Access and DC Universe originals are growing.

## Demand distribution of a selection of top digital originals in Ireland

Show position in Demand Distribution (Q1 2019)



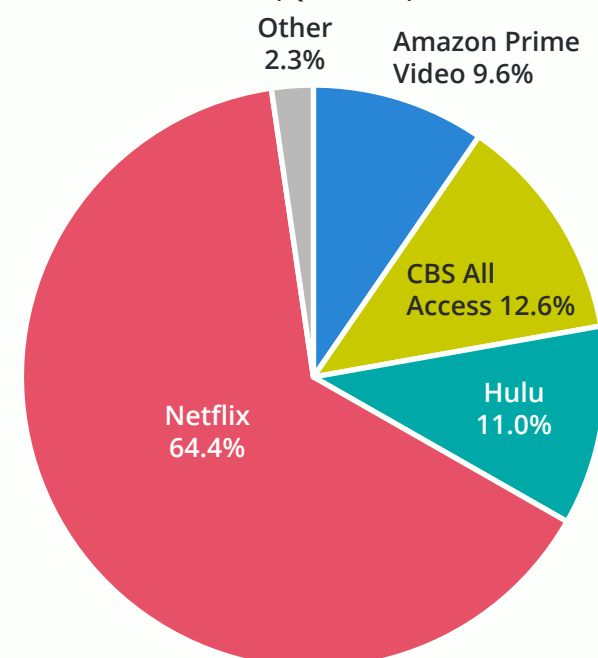
- Q1 2019's most in-demand digital original series in Ireland is Netflix's **The Umbrella Academy**. It has 15.3 times more demand than the average title, making it one of the 2.7% of titles we classify as 'Outstanding'.
- DC Universe's **Doom Patrol** was the ninth most in-demand digital original title in Ireland this quarter despite not being officially available. In this era of content distribution, global audiences will not wait to consume an anticipated US title.
- YouTube Premium's comedy **Wayne** was released this quarter and has resonated well with Irish audiences.

# Ireland platform demand share for drama and action/adventure digital originals

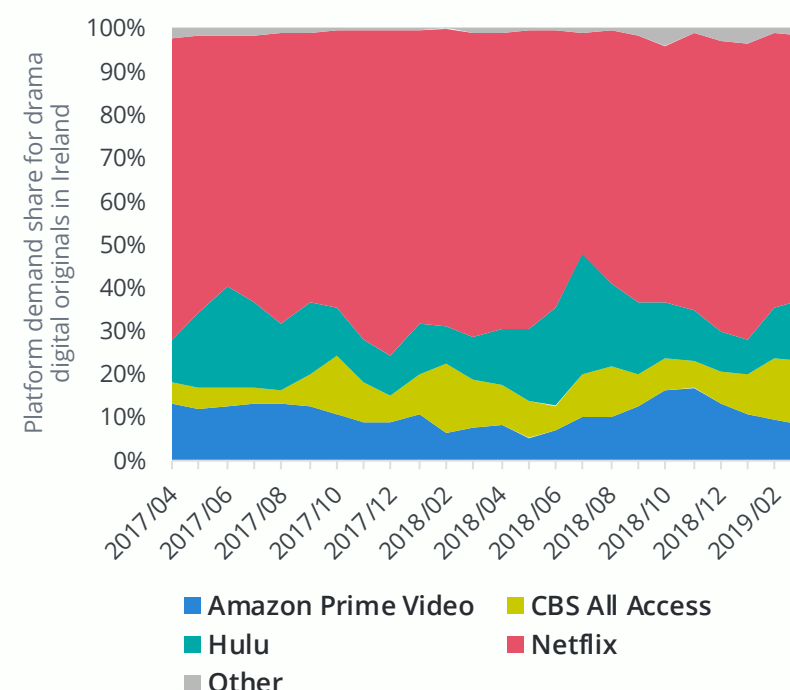
April, 2017 – March, 2019

## Ireland market demand share by original platform for drama digital originals

Platform drama demand share  
(Q1 2019)



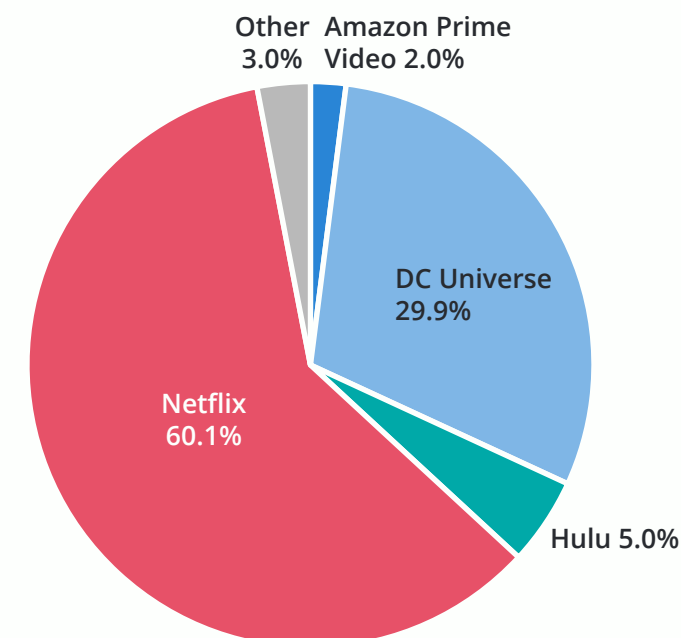
Platform demand share trend for drama  
(24 months)



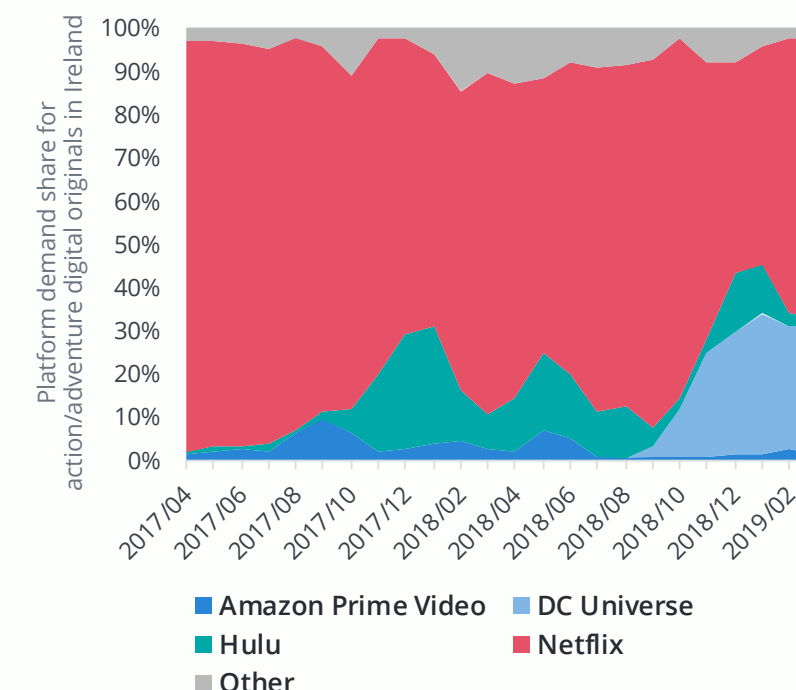
- The demand share by platform for digital original dramas in Ireland for Q1 2019 is in line with the average across all markets in this report.
- At 11.0%, the demand share for Hulu drama originals in the quarter is slightly above average.
- The 24 month trend shows that Hulu drama originals are historically strong in this market, with a peak of 27.7% share of demand in July 2018.

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

Platform action/adventure demand share  
(Q1 2019)



Platform demand share trend for  
action/adventure (24 months)



- In contrast to the performance of drama originals from Hulu, in the action/adventure genre Hulu originals have a lower demand share in Ireland (5.0%) than in any other market in this report.
- Netflix has the highest demand share in the market with 60.1%.
- The trend chart shows that Netflix has regained demand share in this genre over 2019 Q1, going from 50.2% in January to 64.7% in March.

# Top digital original series in Ireland

January – March, 2019

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

Series Name	In-Market Platform*	Original Platform	Genre	Average daily Demand Expressions (DEx) in Q1 2019	
1 The Umbrella Academy	Netflix	Netflix	Action and Adventure	227,416	
2 Star Trek: Discovery	Netflix	CBS All Access	Drama	175,026	
3 Stranger Things	Netflix	Netflix	Drama	158,234	
4 The Grand Tour	Amazon Prime Video	Amazon Prime Video	Sports	147,242	
5 The Handmaid's Tale	RTÉ	Hulu	Drama	145,076	
6 Marvel's The Punisher	Netflix	Netflix	Action and Adventure	133,753	
7 You	Netflix	Netflix	Drama	127,637	
8 Narcos	Netflix	Netflix	Drama	124,194	
9 Doom Patrol	--	DC Universe	Action and Adventure	106,830	
10 Marvel's Daredevil	Netflix	Netflix	Action and Adventure	100,886	
11 Black Mirror	Netflix	Netflix	Drama	95,773	
12 Titans	Netflix	DC Universe	Action and Adventure	93,802	
13 Orange Is The New Black	Netflix	Netflix	Comedy	93,091	
14 Grace And Frankie	Netflix	Netflix	Comedy	80,967	
15 The Last Kingdom	Netflix	Netflix	Drama	79,776	
16 Sex Education	Netflix	Netflix	Comedy	78,837	
17 Ozark	Netflix	Netflix	Drama	77,168	
18 The Marvelous Mrs. Maisel	Amazon Prime Video	Amazon Prime Video	Comedy	75,872	
19 The Good Fight	RTÉ	CBS All Access	Drama	72,440	
20 Russian Doll	Netflix	Netflix	Comedy	67,467	

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

23 Arrested Development	Netflix	Netflix	Comedy	59,881	
24 Young Justice	Amazon Prime Video	DC Universe	Action and Adventure	59,550	
25 The Man In The High Castle	Amazon Prime Video	Amazon Prime Video	Drama	59,524	
27 Queer Eye	Netflix	Netflix	Reality	57,469	
32 Wayne	YouTube Premium	YouTube Premium	Comedy	50,233	

\* Distributor for most recent season in case of multiple platforms

-- No platform information available, please refer to appendix

## Genre, subgenre, platform demand share and digital original trends

### Japan

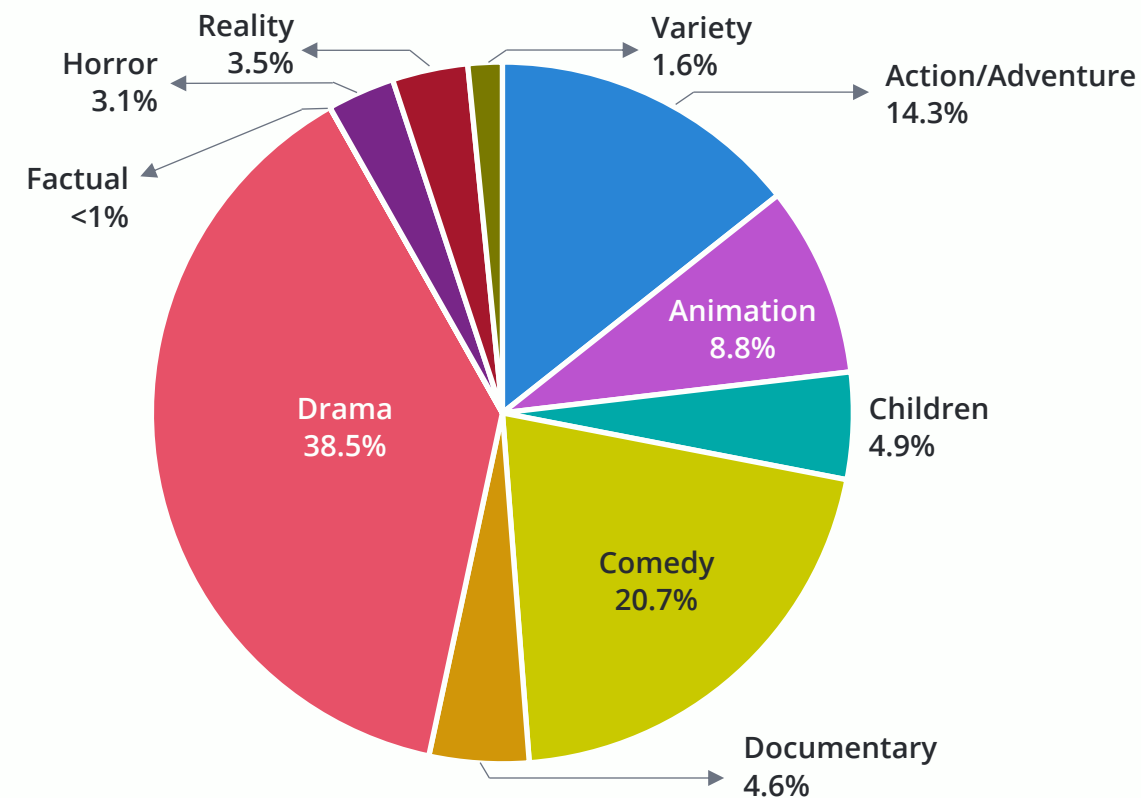
Learn which genres and subgenres of digital originals are most demanded by Japanese audiences. Discover the demand share of the leading SVOD platforms over the past 24 months and explore demand for the top streaming originals.

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

# Japan digital original genre and subgenre preferences

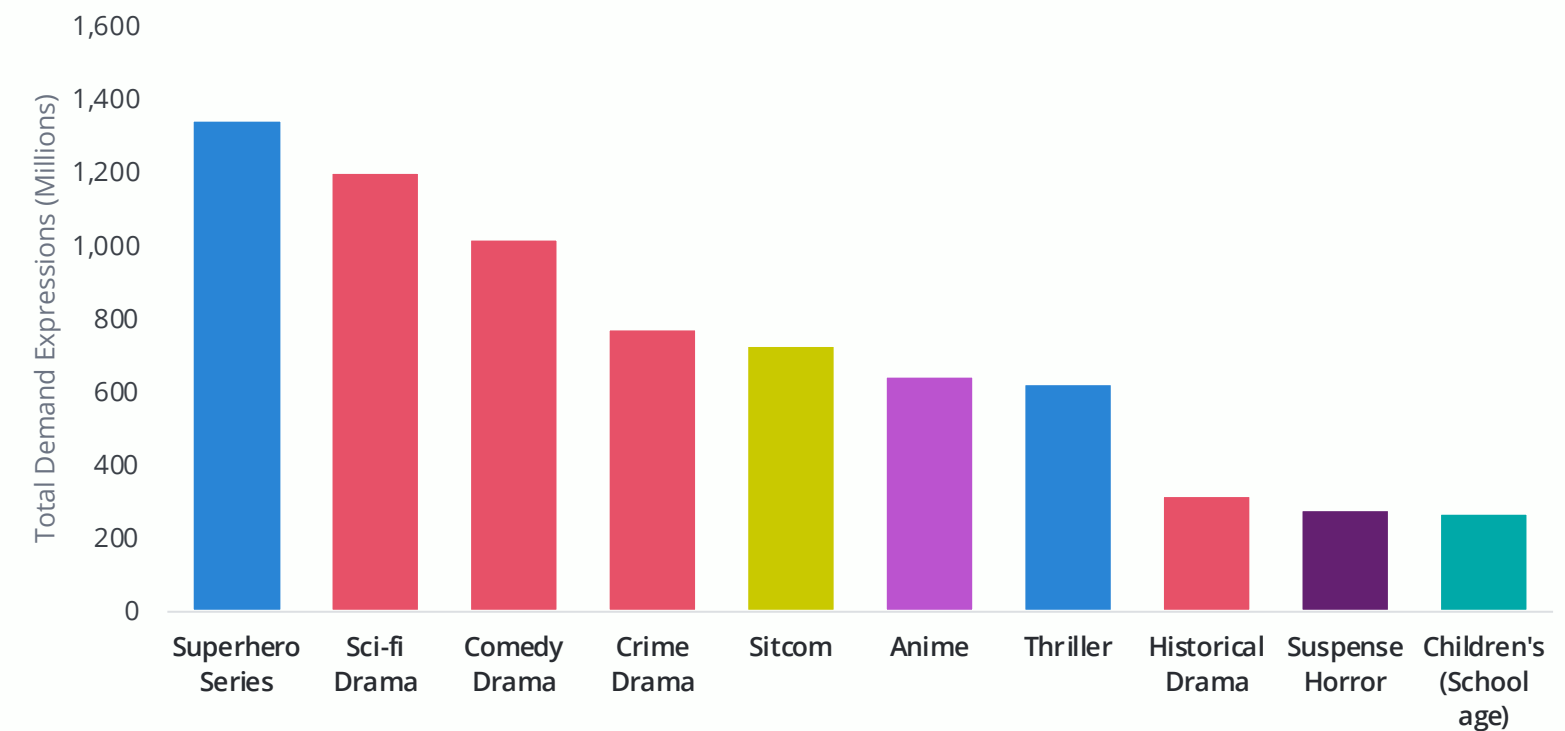
January – March, 2019

Japan market demand share by original platform for all digital originals (Q1 2019)



- Out of all markets in this report, Japan has the largest demand share for two genres of digital original series: The Japanese demand share for variety is 1.6% and for animation the share is 8.8%.
- Animation demand is buoyed in the market by the anime subgenre, which is overwhelmingly produced in Japan.
- Japan has the second smallest demand share for drama originals with 38.5%, after the USA.

The 10 most in-demand subgenres for digital originals in Japan (Q1 2019)



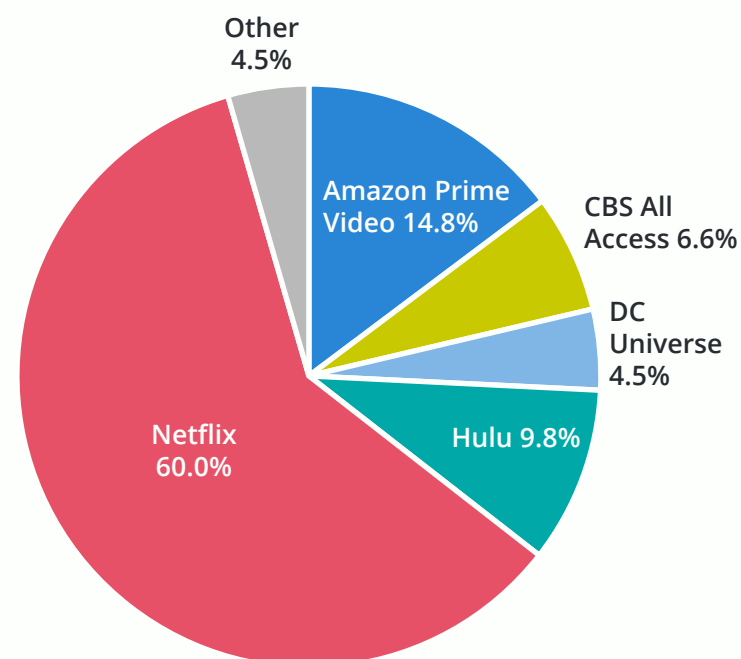
- With 1.35 Billion Demand Expressions for superhero titles recorded in Q1 2019, it is Japan's largest subgenre by total demand.
- As noted in the genre demand share, the top animation subgenre in Japan is anime. It is the sixth largest subgenre in the market.
- Sitcom is the most demanded comedy subgenre and sci-fi is the most demanded drama subgenre.

# Japan platform demand share and digital originals demand distribution

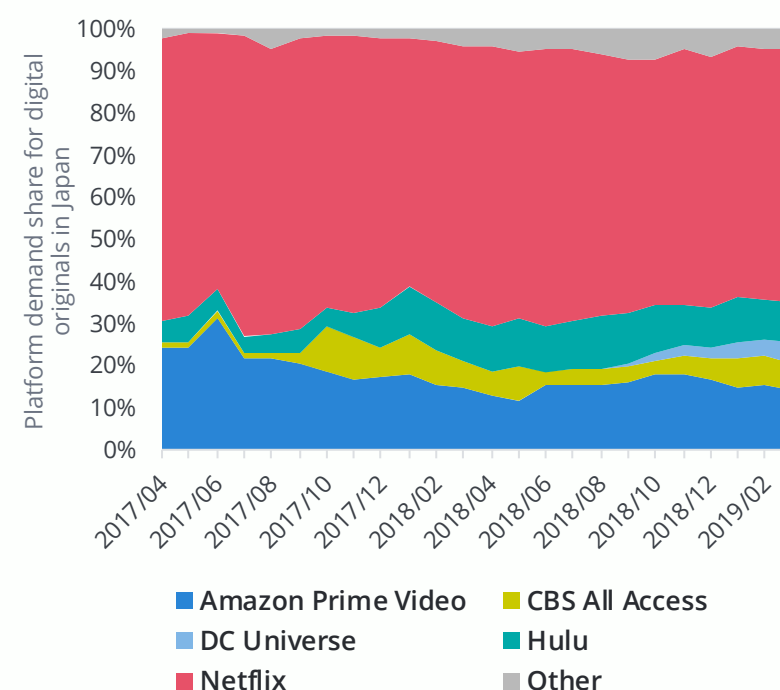
April, 2017 – March, 2019

## Japan market demand share by original platform for all digital originals

Platform demand share (Q1 2019)



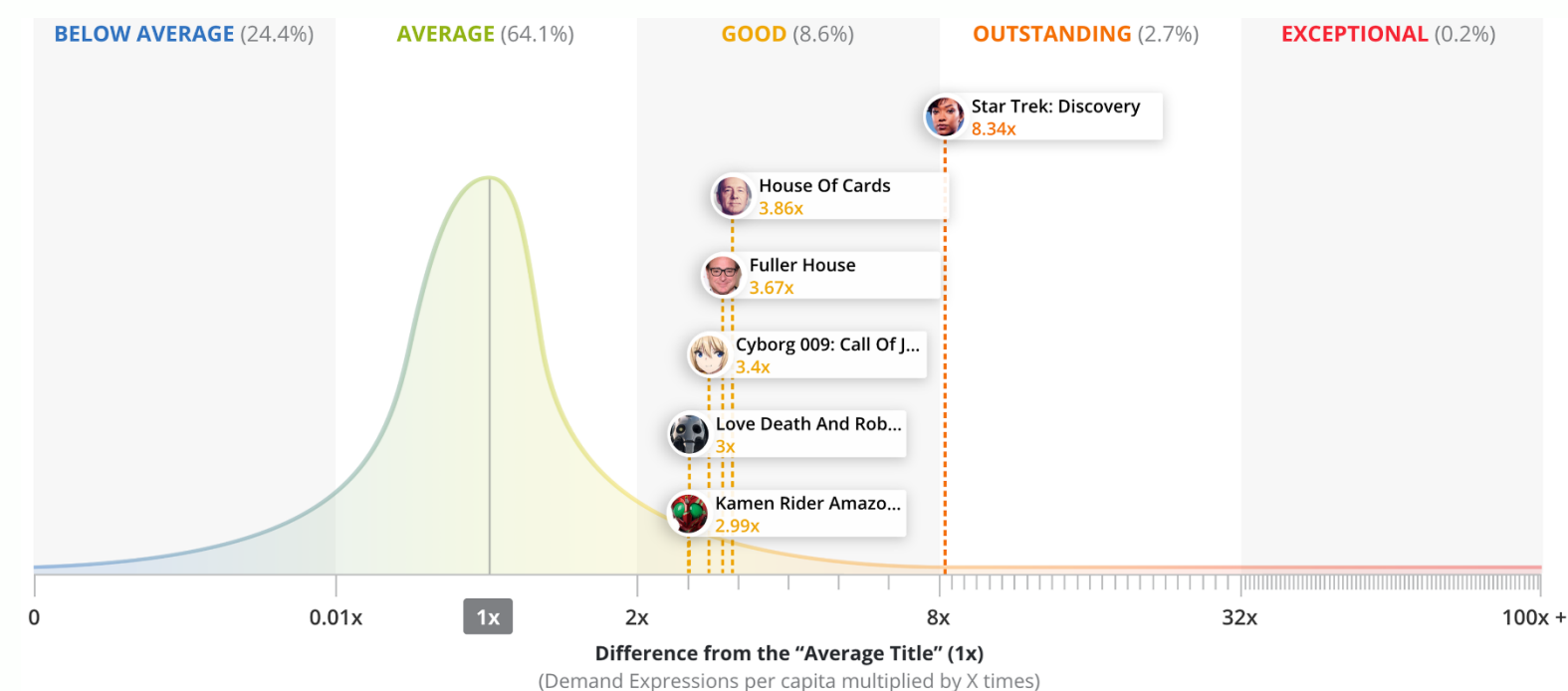
Platform demand share trend (24 months)



- Across all genres, Netflix has the largest platform demand share for digital originals in Japan. However, at 60% it is the smallest Netflix demand share of all the markets in the report.
- This is due to the influence in this market of CBS All Access (6.6%) and Amazon Prime Video (14.8%) original titles. The demand shares for both these platforms are higher in Japan compared to the other markets.
- The 24 month chart shows that the long term trend of Netflix's demand share declining has slowed to show a small gain over the course of Q1.

## Demand distribution of a selection of top digital originals in Japan

Show position in Demand Distribution (Q1 2019)



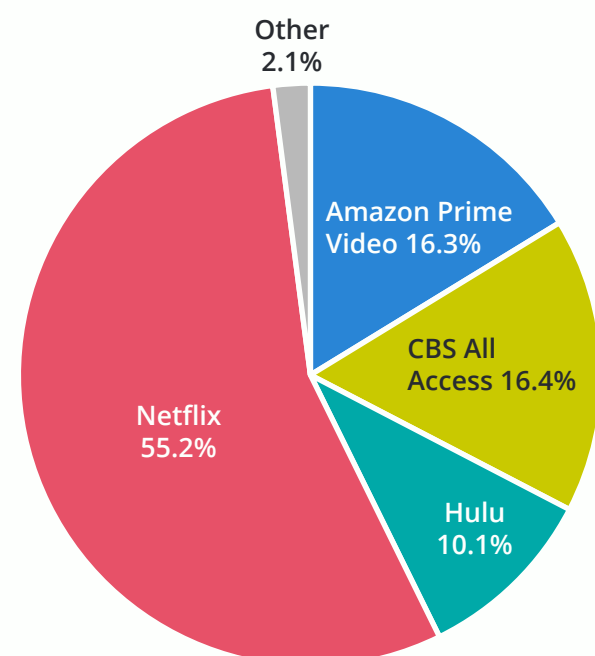
- The most in-demand digital original series in Japan in Q1 2019 is CBS All Access's **Star Trek: Discovery**.
- Japanese audiences engaged more than in most markets with Netflix's experimental **Love, Death + Robots**, which was released this quarter. The innovation with this anthology title is that Netflix used different episode ordering for the series for each user.
- Amazon Prime Video's **Kamen Riders Amazon** continues to be a strong title in this market.

# Japan platform demand share for drama and action/adventure digital originals

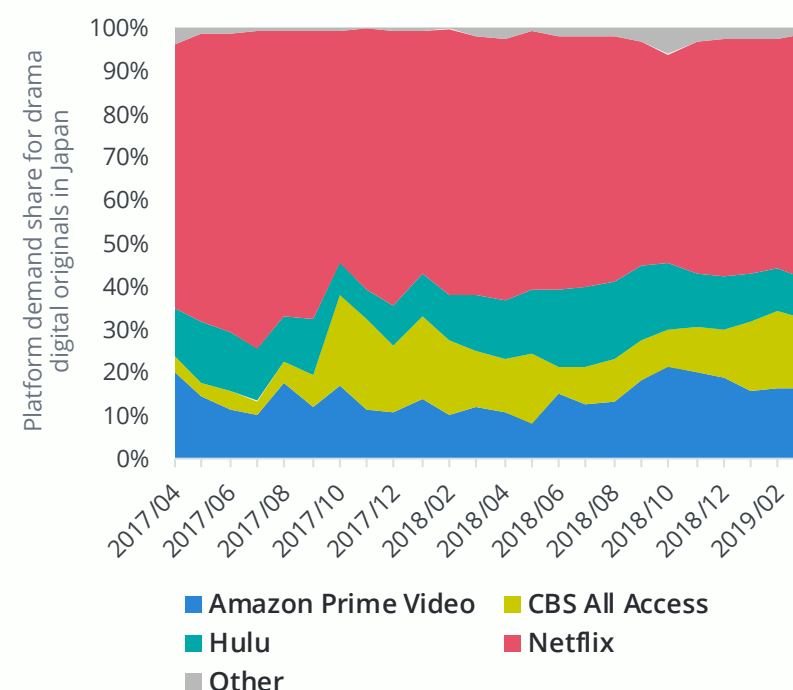
April, 2017 – March, 2019

## Japan market demand share by original platform for drama digital originals

Platform drama demand share (Q1 2019)



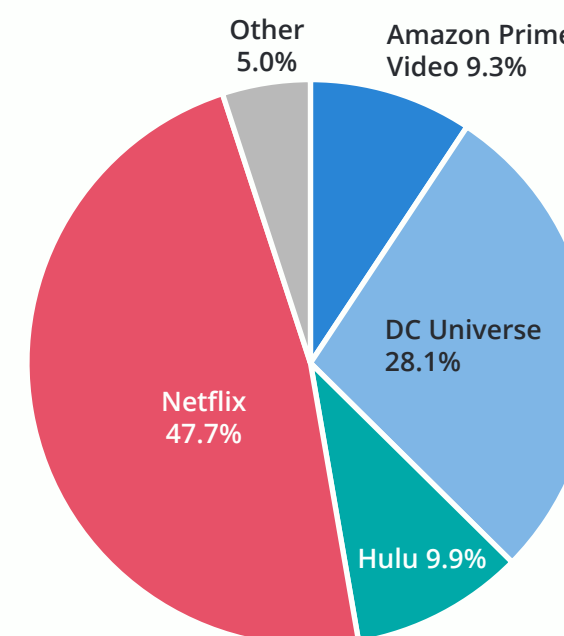
Platform demand share trend for drama (24 months)



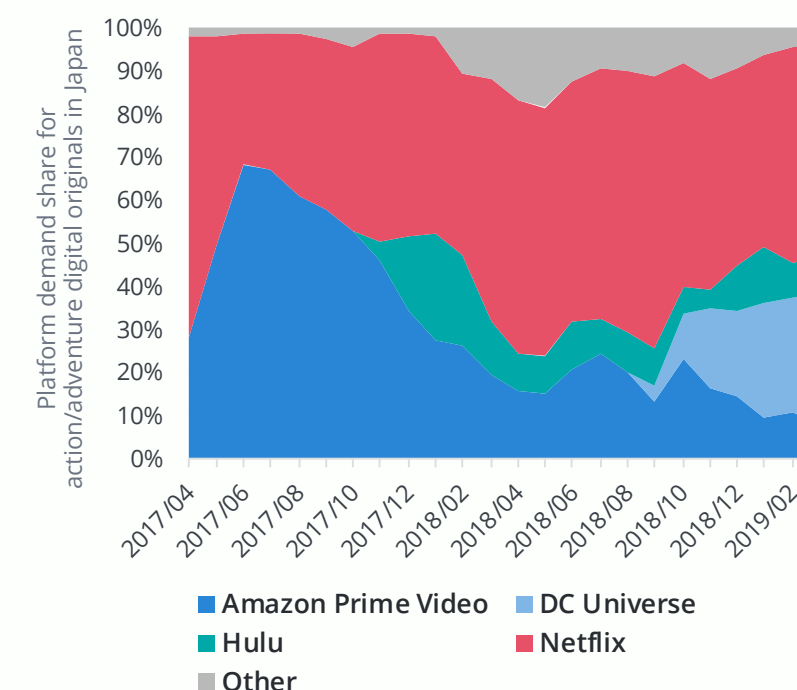
- As with the overall genres trend, while Netflix has the largest drama original title demand share in Japan, at 55.2% it is the smallest Netflix drama demand share of all the markets in this report.
- In the drama genre this is due to CBS All Access (16.4%) and Amazon Prime Video (16.3%) original drama titles, which have larger demand shares here than in any other market in this report.
- The increase in platform share for drama originals from CBS All Access in this quarter can be observed in the 24 month chart.

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

Platform action/adventure demand share (Q1 2019)



Platform demand share trend for action/adventure (24 months)



- The Japanese market for action/adventure digital originals is the best for Amazon Prime Video in this report with 9.3% demand share.
- This is a historically strong market and genre for Amazon: 68.2% of all Japanese demand for action/adventure originals was for Amazon Prime Video originals in June 2017.
- After the USA, Japan has the smallest demand share for Netflix action/adventure originals with 47.7%. This makes it the other market where Netflix has a sub-50% share in action/adventure original series.

# Top digital original series in Japan

January – March, 2019

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

Series Name	In-Market Platform*	Original Platform	Genre	Average daily Demand Expressions (DEx) in Q1 2019	
1 <i>Star Trek: Discovery</i>	Netflix	CBS All Access	Drama	3,321,368	
2 <i>The Grand Tour</i>	Amazon Prime Video	Amazon Prime Video	Sports	2,618,694	
3 <i>Marvel's The Punisher</i>	Netflix	Netflix	Action and Adventure	2,533,023	
4 <i>Titans</i>	Netflix	DC Universe	Action and Adventure	2,269,244	
5 <i>Marvel's Daredevil</i>	Netflix	Netflix	Action and Adventure	1,902,089	
6 <i>Narcos</i>	Netflix	Netflix	Drama	1,864,626	
7 <i>The Handmaid's Tale</i>	Hulu Japan	Hulu	Drama	1,755,181	
8 <i>Marvel's Runaways</i>	Hulu Japan	Hulu	Action and Adventure	1,750,404	
9 <i>Orange Is The New Black</i>	Netflix	Netflix	Comedy	1,740,987	
10 <i>Stranger Things</i>	Netflix	Netflix	Drama	1,698,243	
11 <i>Ultraman</i>	TBS Television/Netflix	TBS Television/Netflix	Animation	1,696,758	
12 <i>House Of Cards</i>	Netflix	Netflix	Drama	1,536,817	
13 <i>Black Mirror</i>	Netflix	Netflix	Drama	1,494,288	
14 <i>The Last Kingdom</i>	Netflix	Netflix	Drama	1,474,077	
15 <i>Fuller House</i>	Netflix	Netflix	Comedy	1,459,724	
16 <i>Young Justice</i>	--	DC Universe	Action and Adventure	1,456,453	
17 <i>Cyborg 009: Call Of Justice</i>	Netflix	Netflix	Animation	1,353,934	
18 <i>Castle Rock</i>	WOWOW Prime	Hulu	Horror	1,321,788	
19 <i>The Man In The High Castle</i>	Amazon Prime Video	Amazon Prime Video	Drama	1,210,417	
20 <i>Love Death And Robots</i>	Netflix	Netflix	Drama	1,199,190	

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

21 <i>Kamen Rider Amazons</i>	Amazon Prime Video	Amazon Prime Video	Action and Adventure	1,189,512	
25 <i>A Series Of Unfortunate Events</i>	Netflix	Netflix	Drama	1,141,881	
27 <i>Tell Me A Story</i>	--	CBS All Access	Drama	1,104,314	
32 <i>Documental</i>	Amazon Prime Video	Amazon Prime Video	Reality	983,954	
86 <i>Tidying Up With Marie Kondo</i>	Netflix	Netflix	Reality	424,627	

\* Distributor for most recent season in case of multiple platforms

-- No platform information available, please refer to appendix

## Genre, subgenre, platform demand share and digital original trends

### Netherlands

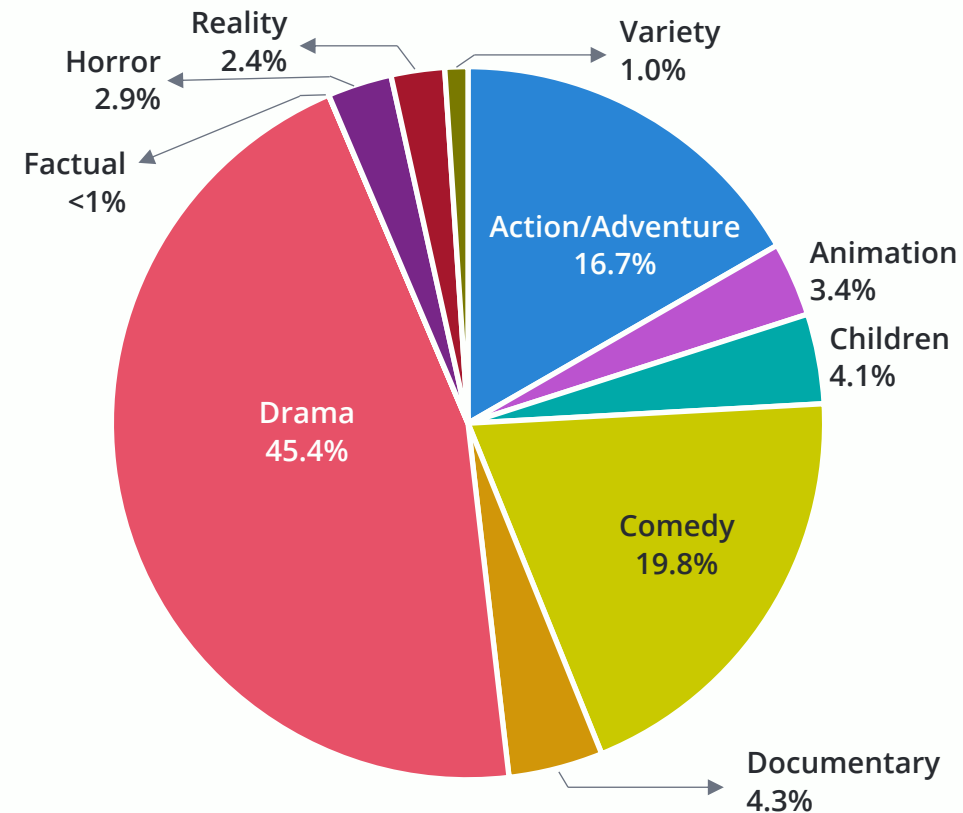
Learn which genres and subgenres of digital originals are most demanded by Dutch audiences. Discover the demand share of the leading SVOD platforms over the past 24 months and explore demand for the top streaming originals.

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

# Netherlands digital original genre and subgenre preferences

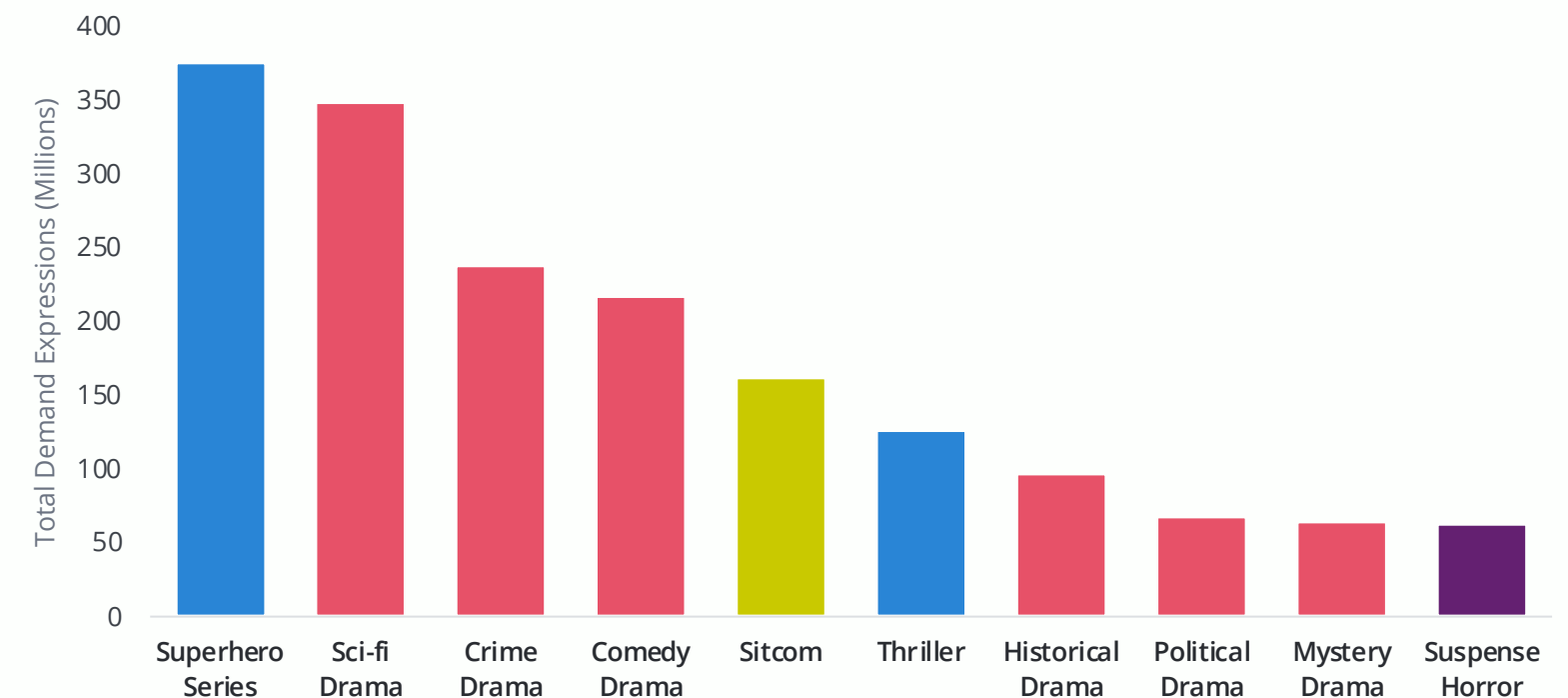
January – March, 2019

Netherlands digital original series genre demand share (Q1 2019)



- Drama is the largest genre, with 45.4% of Dutch demand for original series being expressed for digital original drama titles.
- The genre demand shares for digital originals in the Netherlands generally aligns with the average across all the markets in this report.
- Compared to the other markets, the demand share for animation (3.4%) is slightly lower than average while the demand share for action/adventure (16.7%) is slightly higher.

The 10 most in-demand subgenres for digital originals in the Netherlands (Q1 2019)



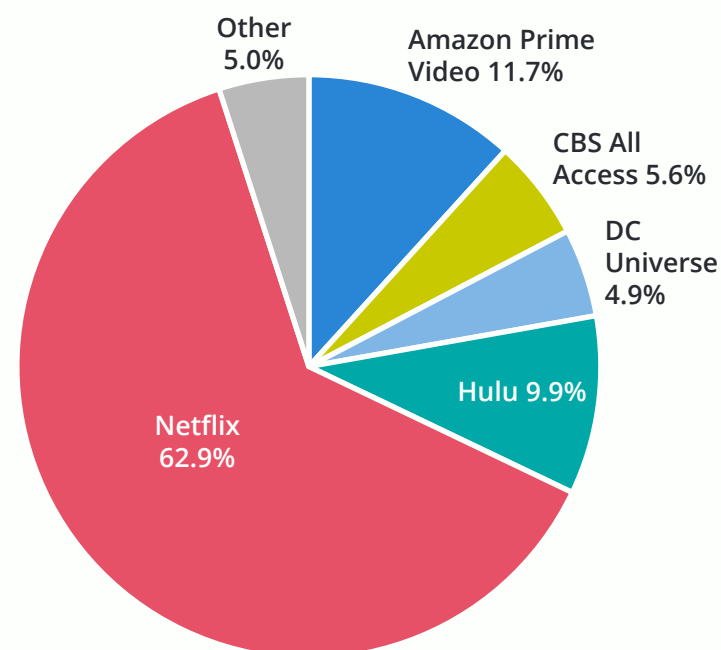
- In the Netherlands, six of the subgenres with the most digital original demand in 2019 Q1 are from the drama genre. The most demanded drama subgenre is sci-fi drama.
- However, the single most in-demand subgenre in the market is superhero series, in the action/adventure genre.
- The most demanded comedy subgenre is sitcom, which is the fifth largest overall.

# Netherlands platform demand share and digital originals demand distribution

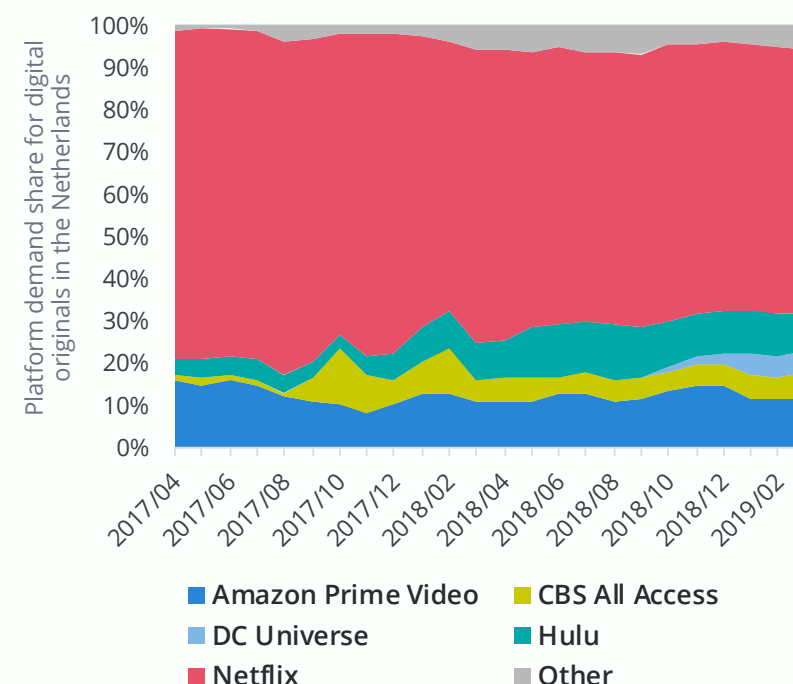
April, 2017 – March, 2019

## Netherlands market demand share by original platform for all digital originals

Platform demand share (Q1 2019)



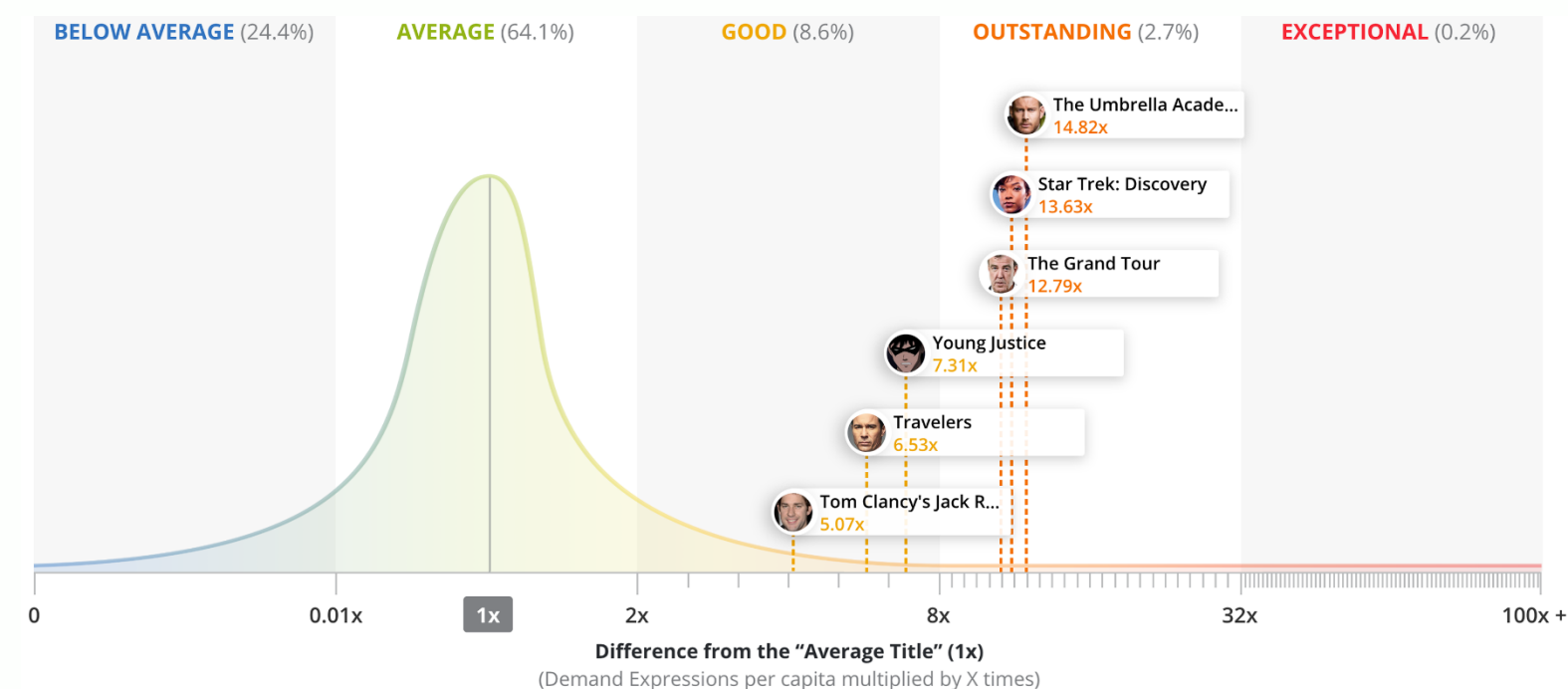
Platform demand share trend (24 months)



- With 62.9%, Netflix Originals account for the majority of Dutch digital original demand. However, this is a lower demand share for Netflix than in most markets in the report.
- The Netherlands has a higher demand share than most other markets in this report for Amazon Prime Video originals: 11.7% of expressed demand in 2019 Q1 over all genres was for an Amazon original.
- Compared to other markets in this report, there have been few shifts in platform demand patterns in this market over the quarter.

## Demand distribution of a selection of top digital originals in the Netherlands

Show position in Demand Distribution (Q1 2019)



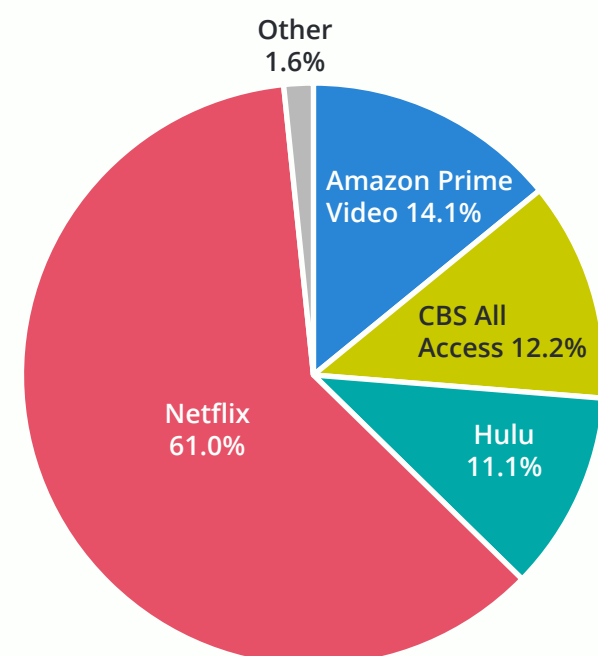
- The most in-demand digital original series in the Netherlands in 2019 Q1 is Netflix's **The Umbrella Academy**. It has 14.8 times more demand than the average title, making it one of the 2.7% of titles that are classed as 'Outstanding'.
- CBS All Access's **Star Trek: Discovery** and Amazon Prime Video's **The Grand Tour** are also 'Outstanding' titles in this market.
- The Dutch audience preference for sci-fi drama is evident in the high demand expressed for Netflix's **Travelers**.

# Netherlands platform demand share for drama and action/adventure digital originals

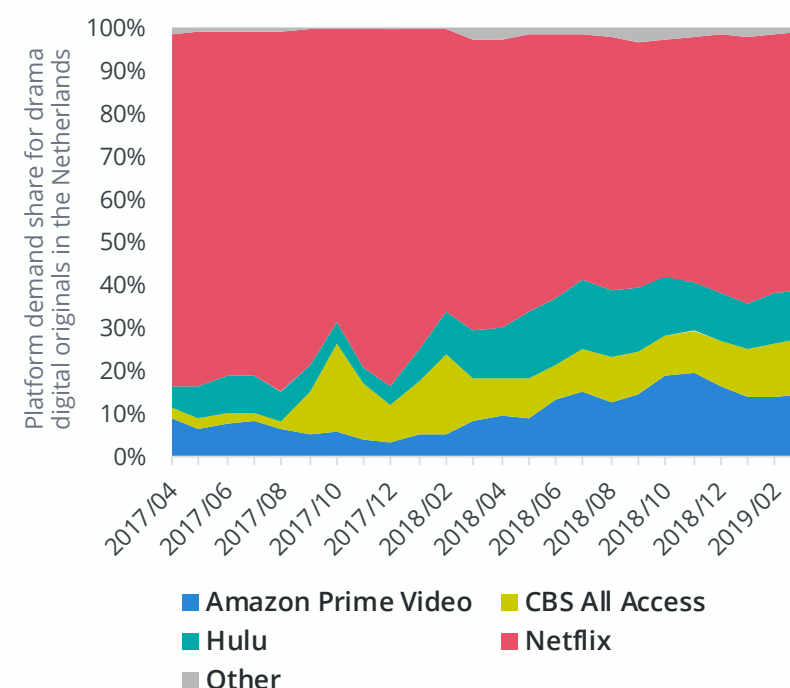
April, 2017 – March, 2019

## Netherlands market demand share by original platform for drama digital originals

Platform drama demand share  
(Q1 2019)



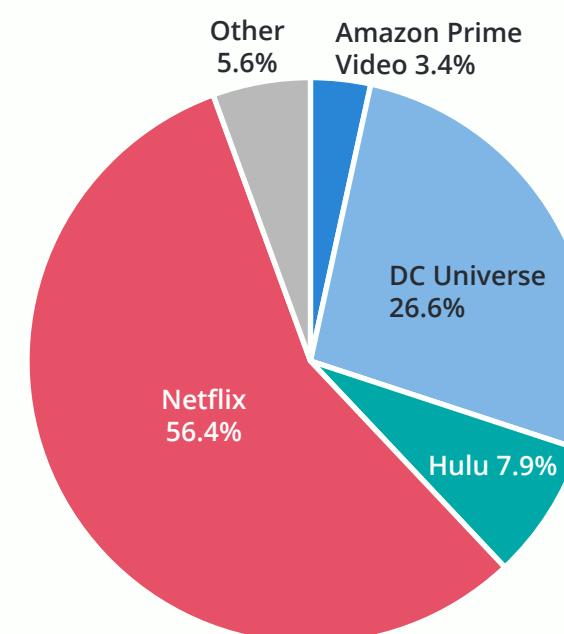
Platform demand share trend for drama  
(24 months)



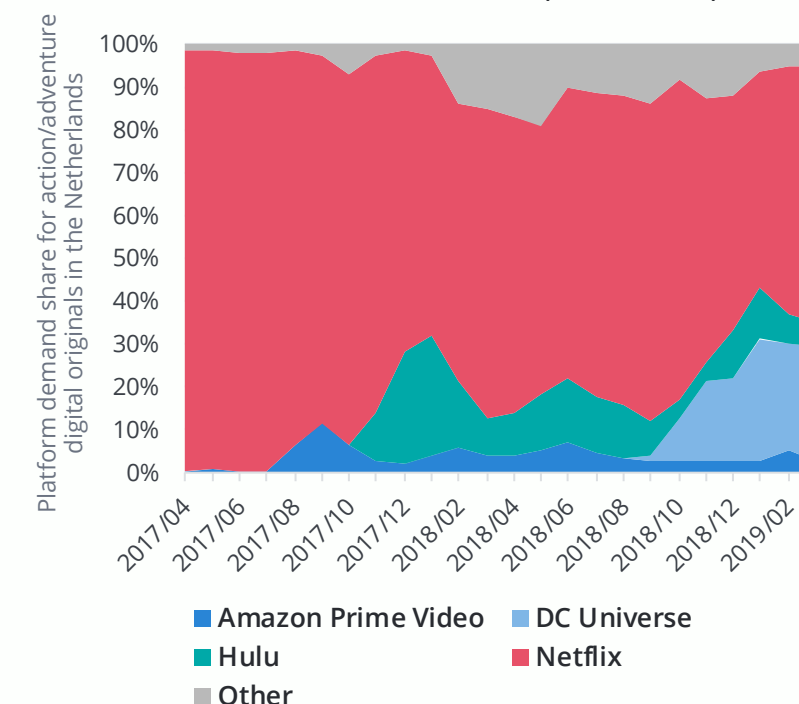
- Netflix titles account for 61.0% of all demand expressed for digital original drama titles in the Netherlands in 2019 Q1.
- The Netherlands has 14.1% demand share for Amazon Prime Video drama originals. This is both the second largest platform within the market and an above average share when compared to other markets in this report.
- The 24 month chart shows that in the Netherlands, the trend over the most recent 12 months is growth for the demand share for drama from Amazon Prime Video.

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

Platform action/adventure demand share  
(Q1 2019)



Platform demand share trend for  
action/adventure (24 months)



- Netflix originals retain a majority of demand in this market and genre, accounting for 56.4% of Dutch demand for action/adventure digital originals.
- The second largest share of demand belongs to titles from DC Universe, which has 26.6% of action/adventure demand.
- Breaking the platform demand share down by individual months shows that the Netflix demand share in this genre contracted to 50.2% in January 2019.

# Top digital original series in the Netherlands

January – March, 2019

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

Series Name	In-Market Platform*	Original Platform	Genre	Average daily Demand Expressions (DEx) in Q1 2019	
1 <i>The Umbrella Academy</i>	Netflix	Netflix	Action and Adventure	790,461	
2 <i>Star Trek: Discovery</i>	Netflix	CBS All Access	Drama	723,742	
3 <i>The Grand Tour</i>	Amazon Prime Video	Amazon Prime Video	Sports	679,245	
4 <i>Narcos</i>	Netflix	Netflix	Drama	600,084	
5 <i>Marvel's The Punisher</i>	Netflix	Netflix	Action and Adventure	595,228	
6 <i>Stranger Things</i>	Netflix	Netflix	Drama	550,747	
7 <i>The Last Kingdom</i>	Netflix	Netflix	Drama	538,424	
8 <i>Titans</i>	Netflix	DC Universe	Action and Adventure	535,978	
9 <i>Black Mirror</i>	Netflix	Netflix	Drama	525,464	
10 <i>The Handmaid's Tale</i>	Videoland	Hulu	Drama	518,187	
11 <i>Marvel's Daredevil</i>	Netflix	Netflix	Action and Adventure	509,968	
12 <i>You</i>	Netflix	Netflix	Drama	452,709	
13 <i>Orange Is The New Black</i>	Netflix	Netflix	Comedy	422,427	
14 <i>Young Justice</i>	Netflix	DC Universe	Action and Adventure	387,710	
15 <i>House Of Cards</i>	Netflix	Netflix	Drama	374,536	
16 <i>Marvel's Runaways</i>	--	Hulu	Action and Adventure	367,310	
17 <i>The Man In The High Castle</i>	Amazon Prime Video	Amazon Prime Video	Drama	356,675	
18 <i>Travelers</i>	Netflix	Netflix	Drama	345,838	
19 <i>A Series Of Unfortunate Events</i>	Netflix	Netflix	Drama	340,691	
20 <i>Doom Patrol</i>	--	DC Universe	Action and Adventure	307,783	

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

23 <i>Formula 1: Drive To Survive</i>	Netflix	Netflix	Documentary	297,934	
27 <i>Tom Clancy's Jack Ryan</i>	Amazon Prime Video	Amazon Prime Video	Drama	269,595	
30 <i>The Widow</i>	Amazon Prime Video	Amazon Prime Video	Drama	253,021	
32 <i>Suburra</i>	Netflix	Netflix	Drama	224,636	
34 <i>Origin</i>	YouTube Premium	YouTube Premium	Drama	213,434	

\* Distributor for most recent season in case of multiple platforms

-- No platform information available, please refer to appendix

## Genre, subgenre, platform demand share and digital original trends

### Russia

Learn which genres and subgenres of digital originals are most demanded by Russian audiences. Discover the demand share of the leading SVOD platforms over the past 24 months and explore demand for the top streaming originals.

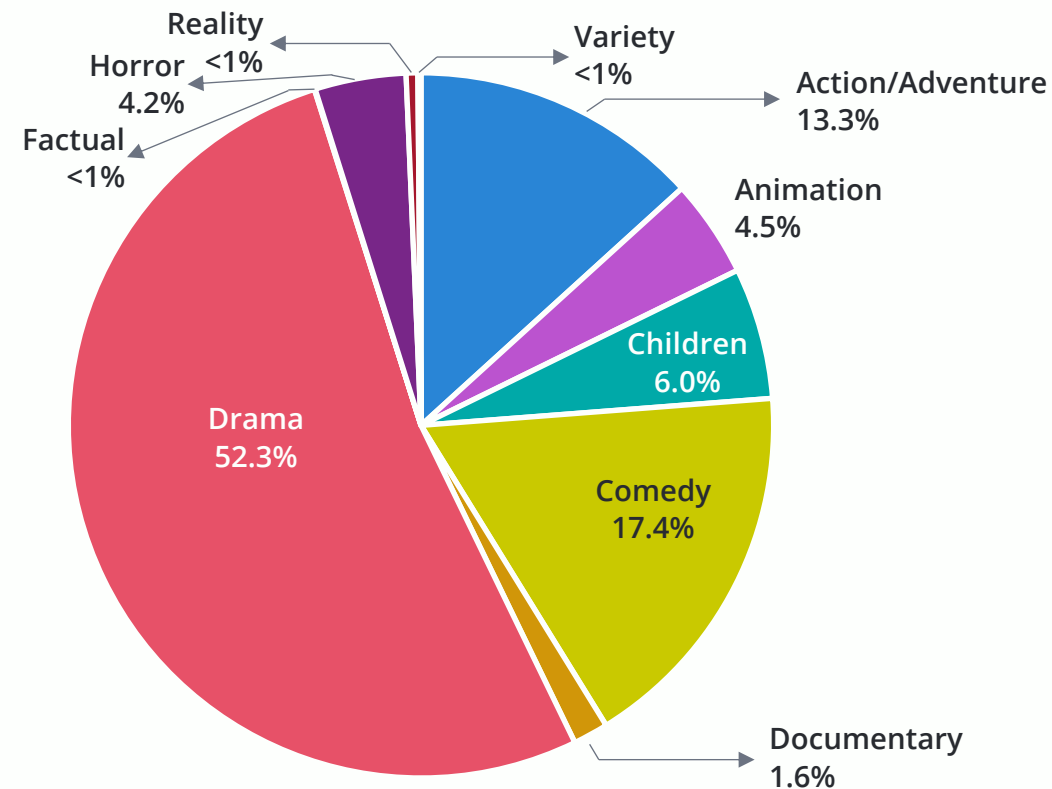
NOTE: The insights presented in this section are based on the entire available Parrot Analytics globalTV demand dataset, which is comprised of 3.5 trillion data points across 100+ languages in 100+ countries.



# Russia digital original genre and subgenre preferences

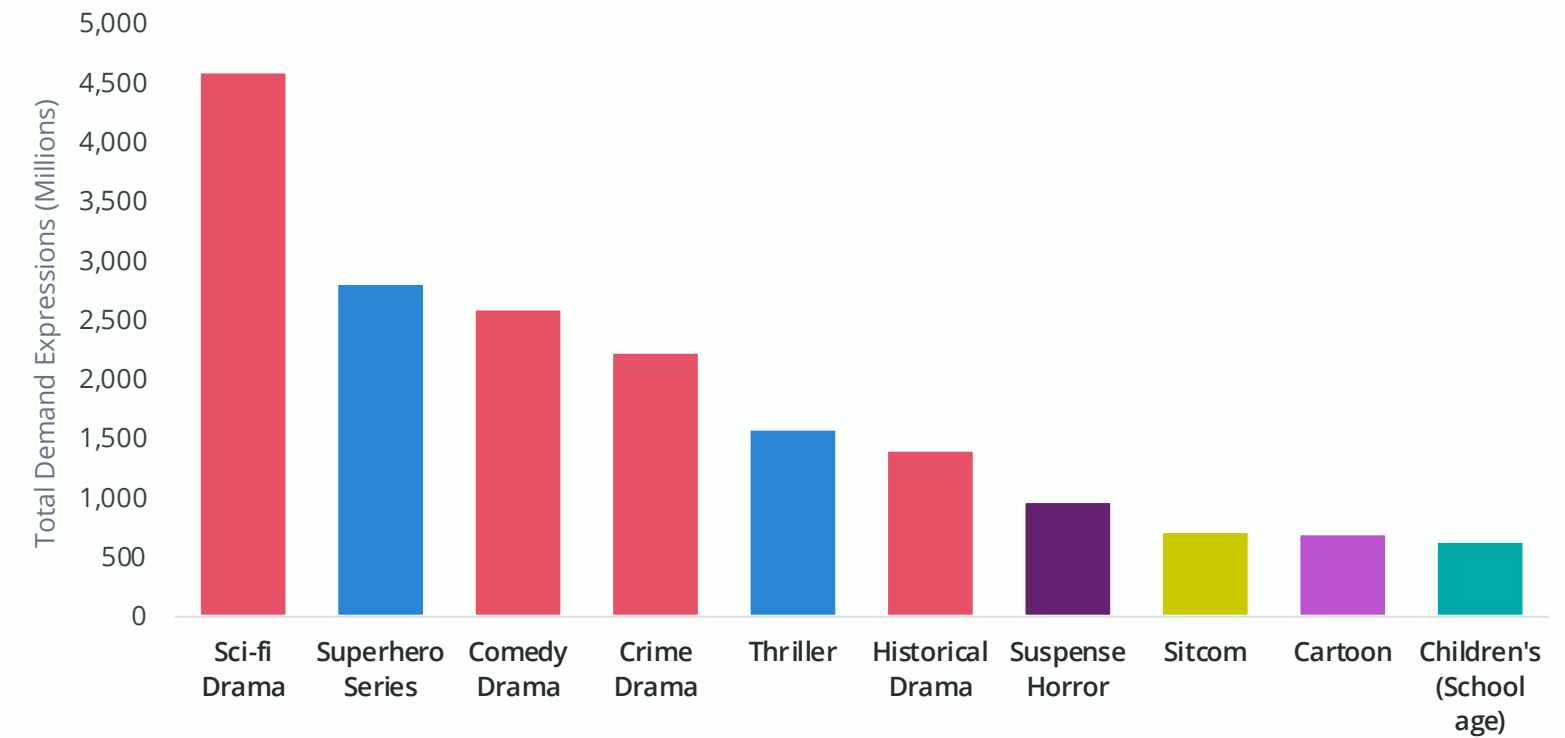
January – March, 2019

Russia digital original series genre demand share (Q1 2019)



- Russians are expressing the most demand for drama digital originals (52.3%).
- Russia has the lowest demand share out of all the markets in this report for four genres of digital original titles: These are action/adventure (13.2%), documentary (1.6%), reality (0.5%) and variety (0.1%).
- Russian audiences have the highest demand share in this report for horror originals with 4.2%

The 10 most in-demand subgenres for digital originals in Russia (Q1 2019)



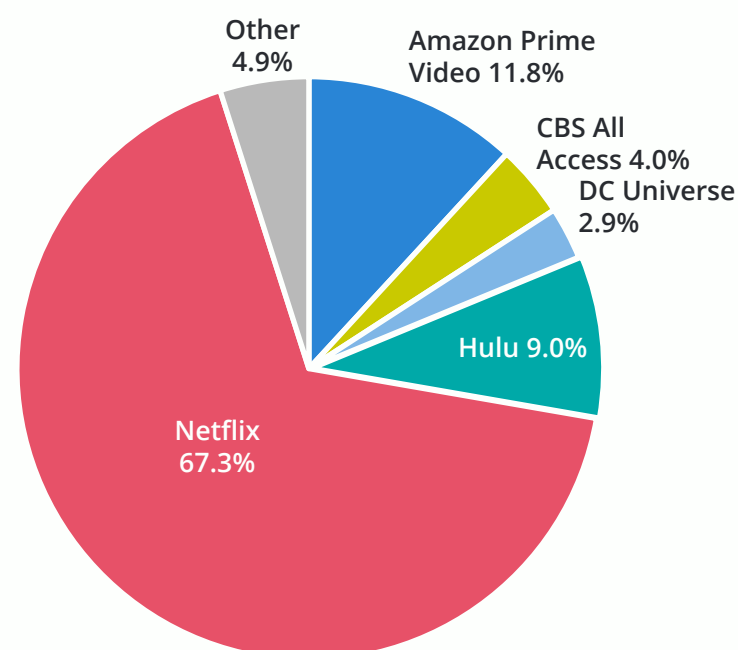
- Russia is also the only market besides Belgium where the drama genre has above 50% of demand across all digital original titles.
- Like in the USA, digital original cartoons have enough demand in Russia for the subgenre to rank in the ten most in-demand subgenres.
- Russia has the largest lead in this report for the most in-demand subgenre: The top subgenre, sci-fi drama, has 63% more demand than the next most in-demand subgenre, superhero series.

# Russia platform demand share and digital originals demand distribution

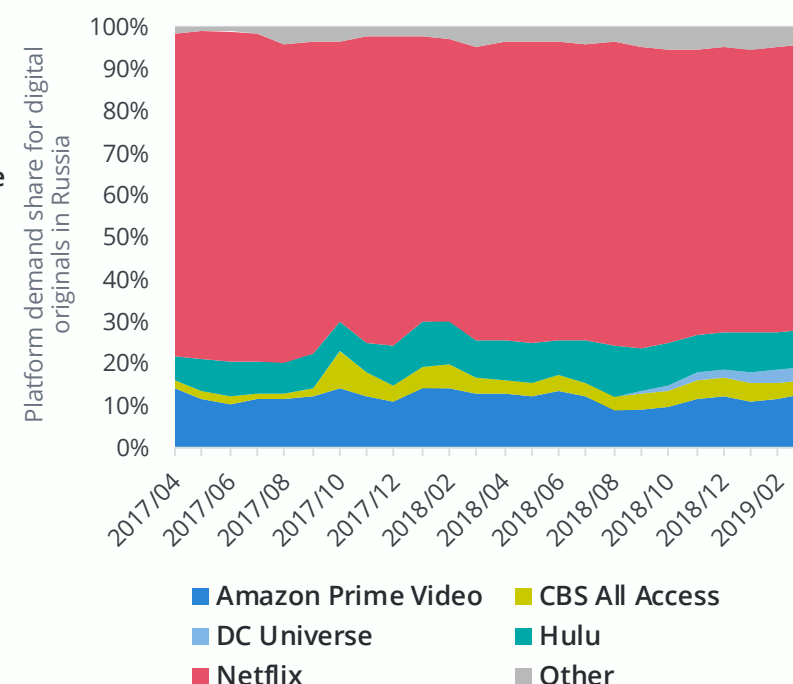
April, 2017 – March, 2019

## Russia market demand share by original platform for all digital originals

Platform demand share (Q1 2019)



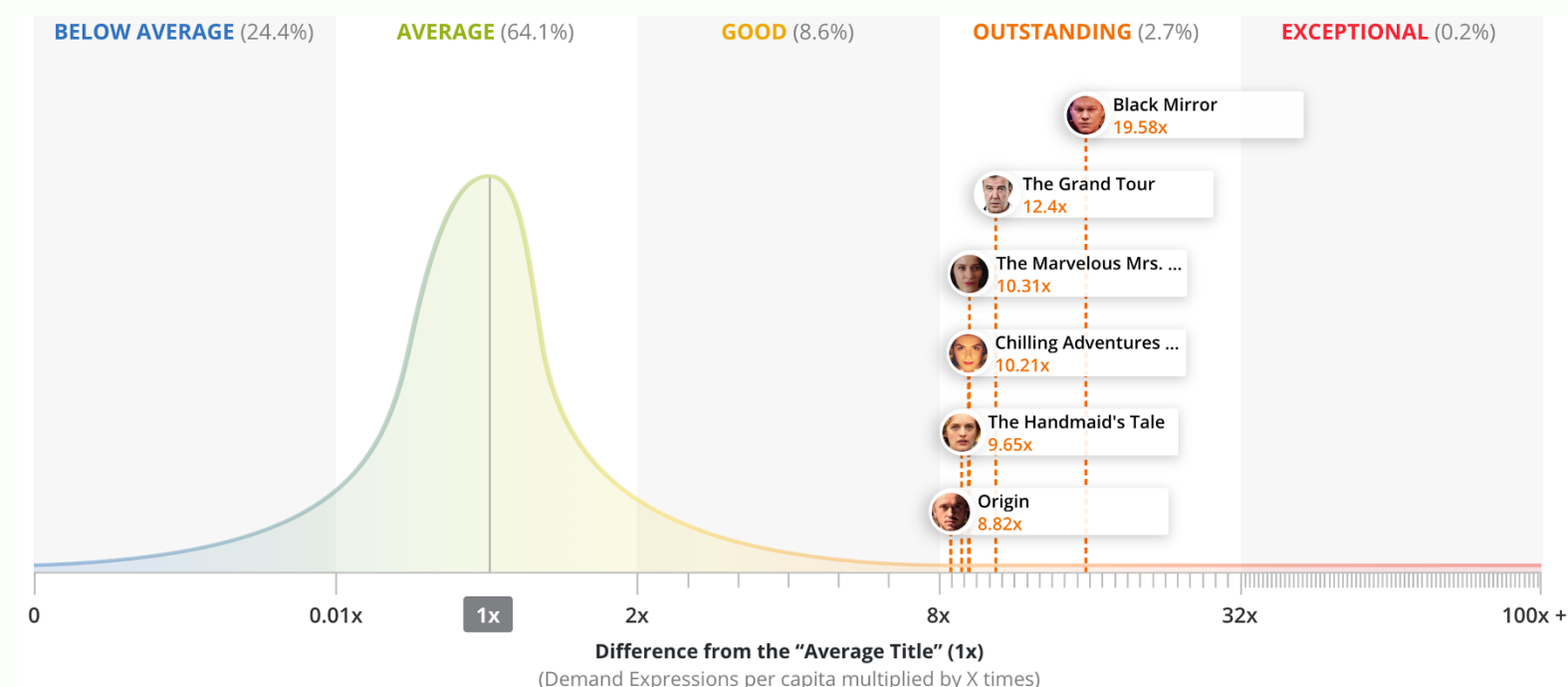
Platform demand share trend (24 months)



- In this market, the 67.3% demand share for Netflix Originals is above average compared to other markets in the report.
- Russia has the smallest demand share of all the markets for originals from DC Universe. Only 2.9% of demand is for this platform's titles.
- Similarly, Russian audiences express less demand for originals from CBS All Access than other markets (4.0%).
- The 24 month trend graph shows that the platform shares have been fairly stable over the last 3 months.

## Demand distribution of a selection of top digital originals in Russia

Show position in Demand Distribution (Q1 2019)



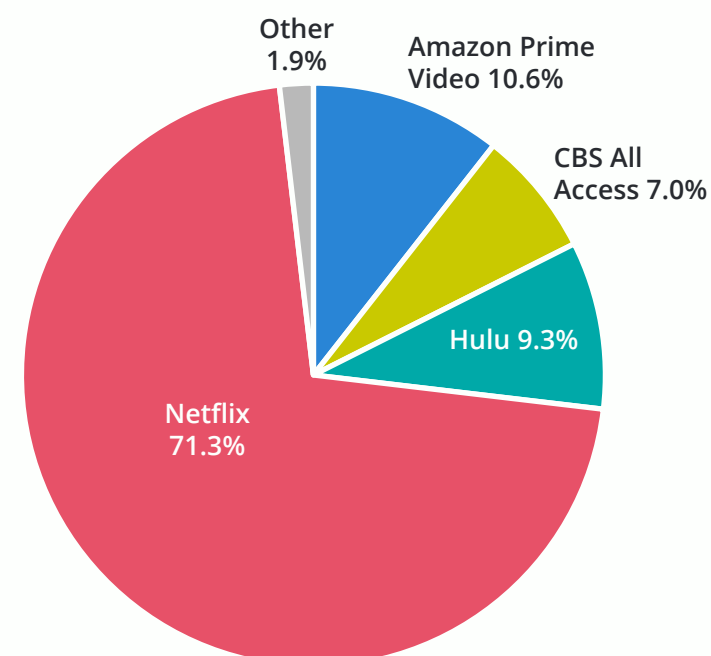
- This quarter's most in-demand digital original series in Russia is Netflix's dystopian sci-fi drama series **Black Mirror**. This title ranks consistently at the top with Russian audiences: It was the most in-demand digital original series for all of 2018 as well.
- The YouTube Premium sci-fi drama **Origin** premiered in November 2018 and became the 19<sup>th</sup> most in-demand digital original in Russia in Q1 2019.
- Russian audiences enjoy titles from the horror genre, as shown by the high demand for Netflix's **The Chilling Adventures Of Sabrina**

# Russia platform demand share for drama and action/adventure digital originals

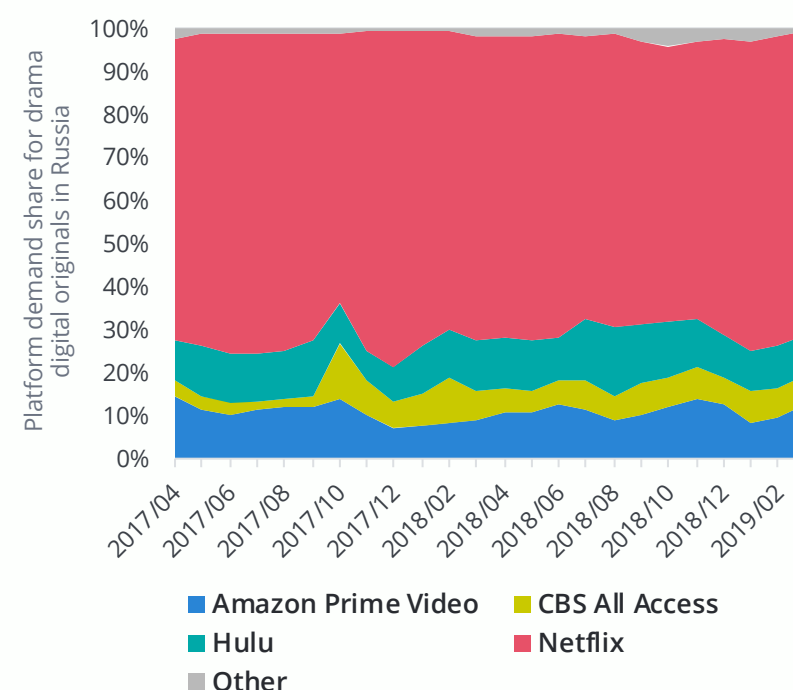
April, 2017 – March, 2019

## Russia market demand share by original platform for drama digital originals

Platform drama demand share  
(Q1 2019)



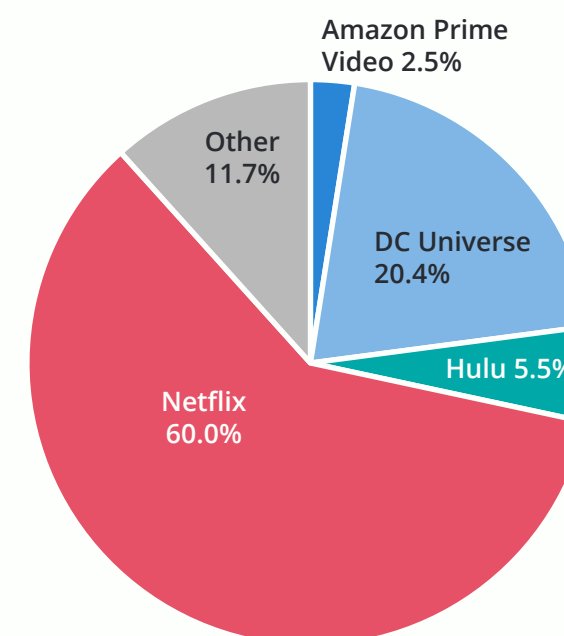
Platform demand share trend for drama  
(24 months)



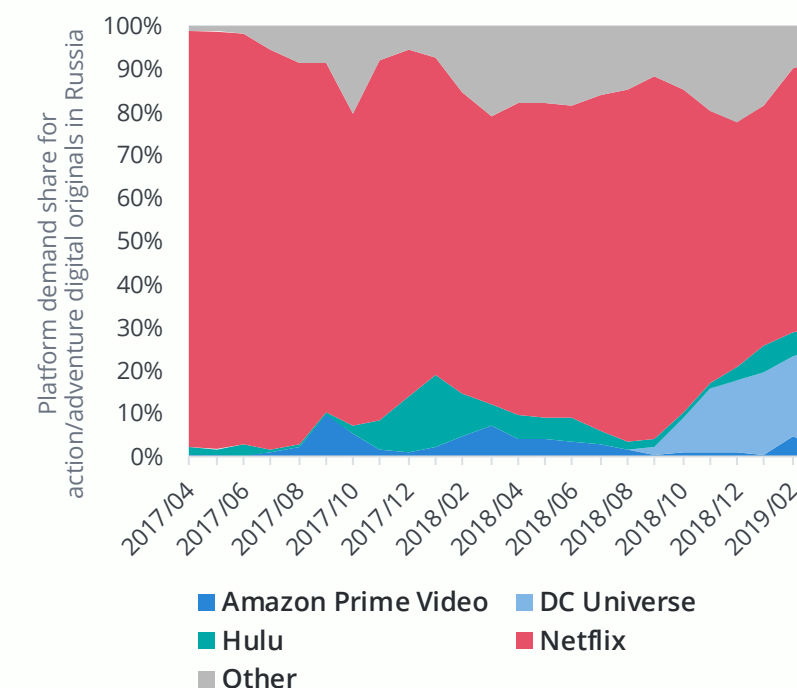
- As in the all genre demand share chart, Russia is where CBS All Access drama originals have the smallest demand share out of all the markets in this report with 7.0%.
- With 71.3% Netflix has the largest share of demand for drama originals in Russia.
- Amazon Prime Video is attracting 10.6% of the demand for drama digital originals.

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

Platform action/adventure demand share  
(Q1 2019)



Platform demand share trend for  
action/adventure (24 months)



- Although digital original titles from DC Universe are still the second largest segment of action/adventure originals in Russia, the demand share here of 20.4% is the lowest out of all the markets in this report.
- However, the 24 month trend shows that the DC Universe demand share is still on the increase in this market.
- Netflix's 60% demand share in this market is the second largest for action/adventure originals in the report, smaller than only in Ireland.

# Top digital original series in Russia

January – March, 2019

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

Series Name	In-Market Platform*	Original Platform	Genre	Average daily Demand Expressions (DEx) in Q1 2019	
1 <i>Black Mirror</i>	Netflix	Netflix	Drama	8,774,215	
2 <i>Stranger Things</i>	Netflix	Netflix	Drama	8,605,128	
3 <i>Narcos</i>	Netflix	Netflix	Drama	6,507,527	
4 <i>The Grand Tour</i>	Amazon Prime Video	Amazon Prime Video	Sports	5,561,852	
5 <i>The Last Kingdom</i>	Netflix	Netflix	Drama	5,451,363	
6 <i>Marvel's Daredevil</i>	Netflix	Netflix	Action and Adventure	5,110,907	
7 <i>Marvel's The Punisher</i>	Netflix	Netflix	Action and Adventure	5,034,240	
8 <i>Star Trek: Discovery</i>	Netflix	CBS All Access	Drama	4,812,088	
9 <i>The Marvelous Mrs. Maisel</i>	Amazon Prime Video	Amazon Prime Video	Comedy	4,623,291	
10 <i>Chilling Adventures Of Sabrina</i>	Netflix	Netflix	Horror	4,574,987	
11 <i>Sex Education</i>	Netflix	Netflix	Comedy	4,534,973	
12 <i>House Of Cards</i>	Netflix	Netflix	Drama	4,518,461	
13 <i>The Haunting Of Hill House</i>	Netflix	Netflix	Drama	4,388,057	
14 <i>Castle Rock</i>	Yandex Plus	Hulu	Horror	4,374,868	
15 <i>The Handmaid's Tale</i>	Okko	Hulu	Drama	4,327,508	
16 <i>Altered Carbon</i>	Netflix	Netflix	Drama	4,300,588	
17 <i>13 Reasons Why</i>	Netflix	Netflix	Drama	4,088,892	
18 <i>The Umbrella Academy</i>	Netflix	Netflix	Action and Adventure	4,026,672	
19 <i>Origin</i>	YouTube Premium	YouTube Premium	Drama	3,953,353	
20 <i>Travelers</i>	Netflix	Netflix	Drama	3,784,967	

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

21 <i>Titans</i>	Netflix	DC Universe	Action and Adventure	3,710,126	
22 <i>11.22.63</i>	FOX	Hulu	Drama	3,527,612	
25 <i>Wayne</i>	YouTube Premium	YouTube Premium	Comedy	3,431,259	
27 <i>The Kominsky Method</i>	Netflix	Netflix	Comedy	3,303,503	
32 <i>Maniac</i>	Netflix	Netflix	Comedy	2,880,213	

\* Distributor for most recent season in case of multiple platforms

-- No platform information available, please refer to appendix

## Genre, subgenre, platform demand share and digital original trends

### South Africa

Learn which genres and subgenres of digital originals are most demanded by South African audiences. Discover the demand share of the leading SVOD platforms over the past 24 months and explore demand for the top streaming originals.

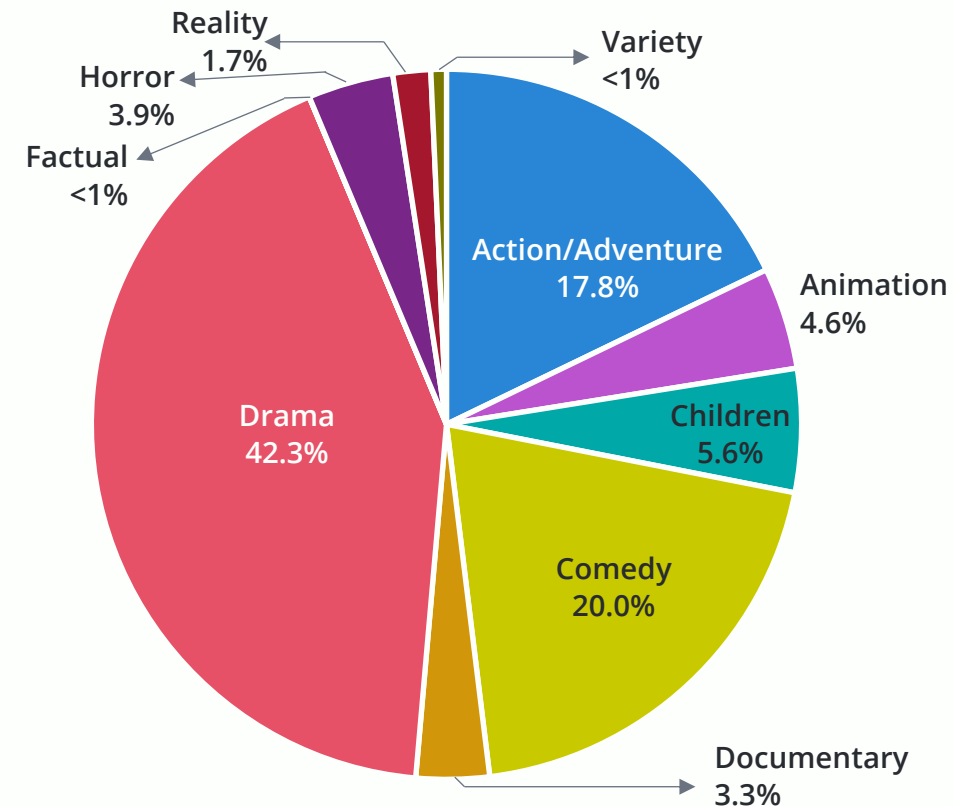


NOTE: The insights presented in this section are based on the entire available Parrot Analytics globalTV demand dataset, which is comprised of 3.5 trillion data points across 100+ languages in 100+ countries.

# South Africa digital original genre and subgenre preferences

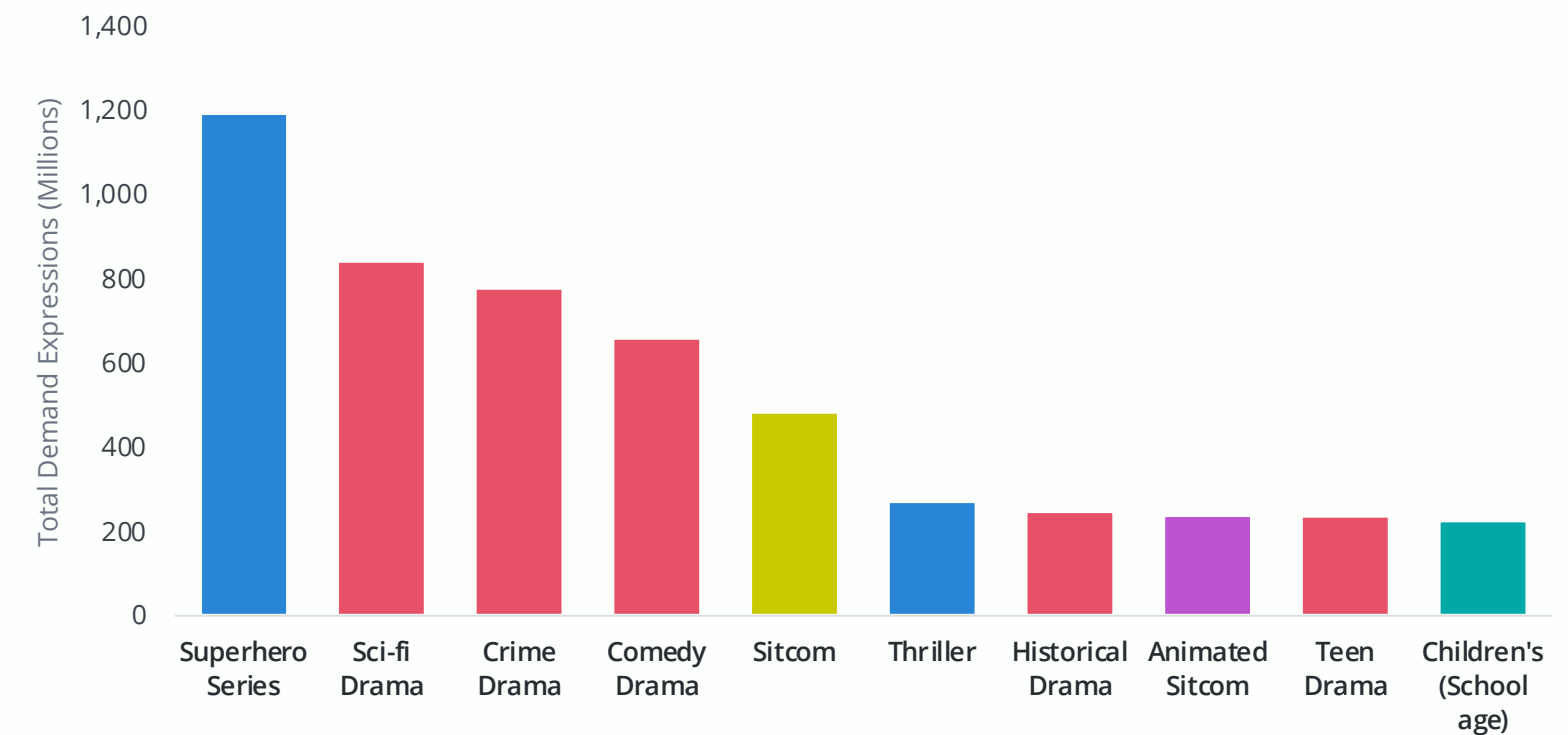
January – March, 2019

South Africa digital original series genre demand share (Q1 2019)



- Compared to the other markets, South Africa has the highest demand share in this report for action/adventure digital originals. 17.8% of the demand for original series in this market is in this genre.
- At 3.9%, South Africa also has a higher demand share for horror originals than every other market, except Russia.
- Conversely, South African audiences express below average demand for the reality genre, with a demand share of only 1.7%.

The 10 most in-demand subgenres for digital originals in South Africa (Q1 2019)



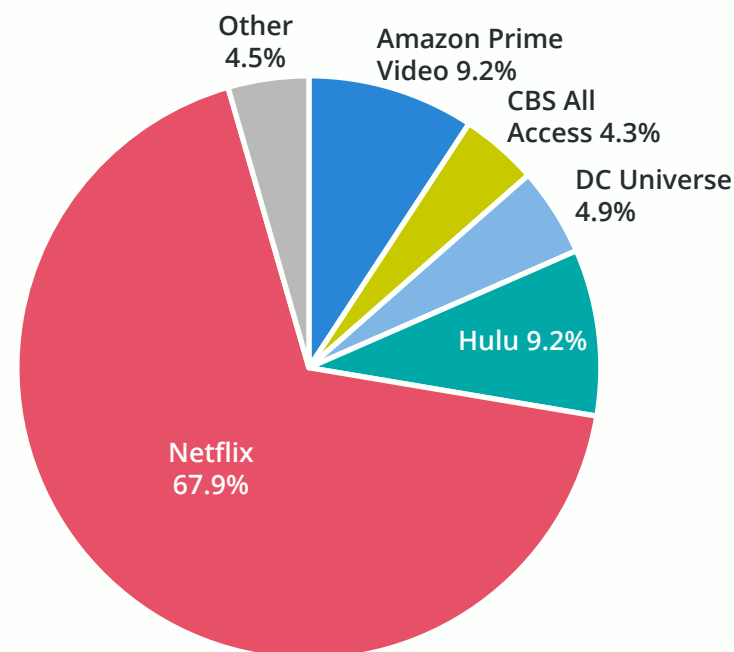
- Half of the ten most in-demand subgenres in South Africa are in the drama genre, with sci-fi drama the biggest of these.
- However, the largest single subgenre in the market is superhero series, in the action/adventure subgenre.
- South Africa has more demand than most markets for the animated sitcom subgenre, which is the 8<sup>th</sup> largest subgenre in the market.

# South Africa platform demand share and digital originals demand distribution

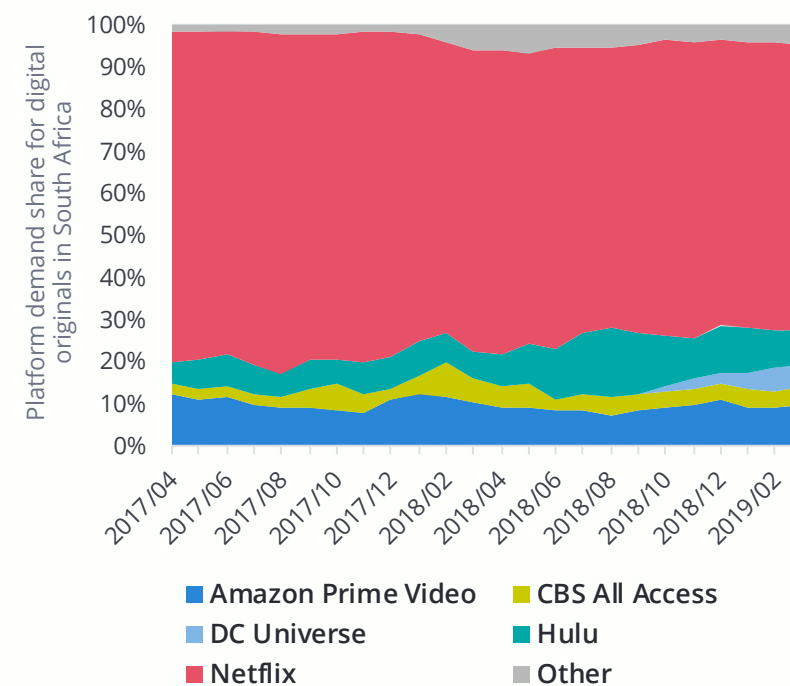
April, 2017 – March, 2019

## South Africa market demand share by original platform for all digital originals

Platform demand share (Q1 2019)



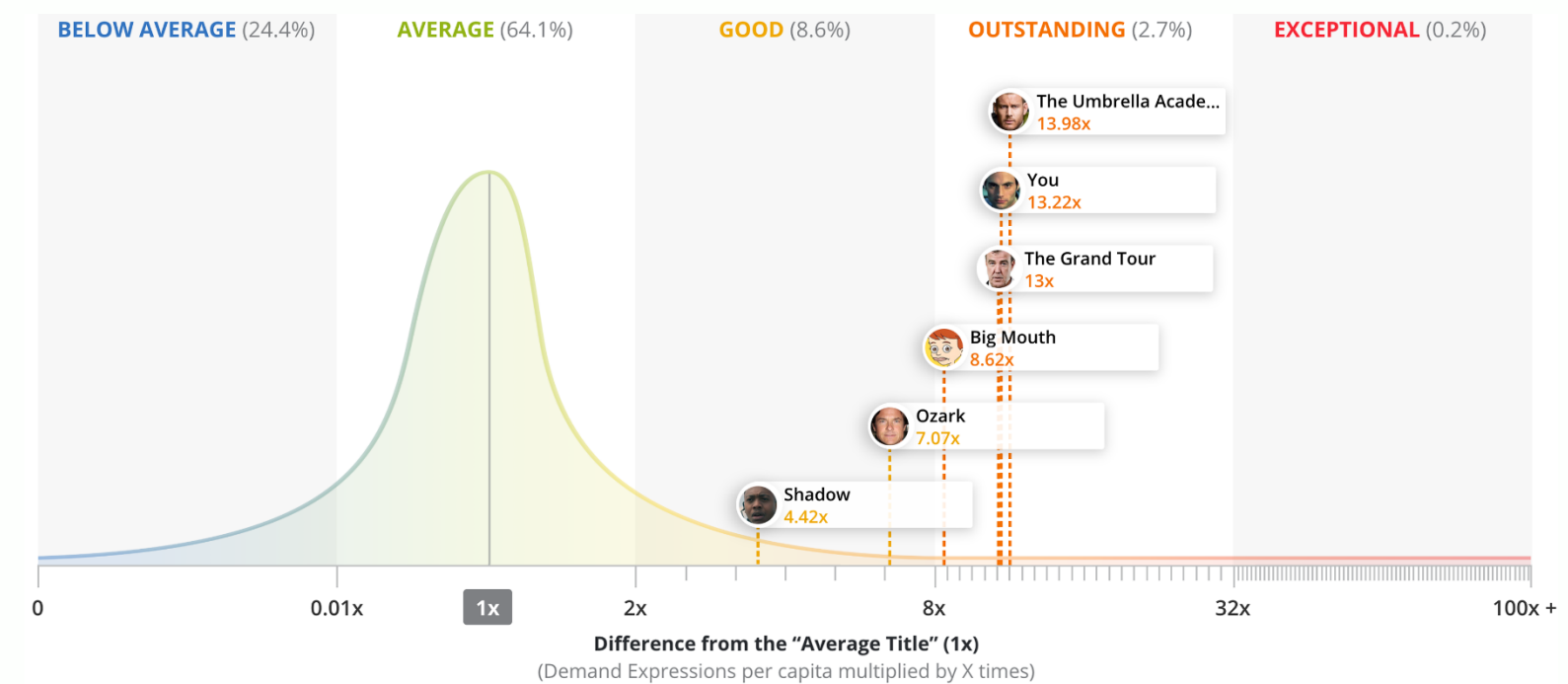
Platform demand share trend (24 months)



- The demand share for Netflix originals is 67.9% in South Africa. This is not only the largest share within the market, but also the largest Netflix share across all markets in this report.
- Contrasting that, the demand share for Amazon Prime Video originals in 2019 Q1 of 9.2% is second smallest across the markets, after Belgium.
- Although the over time chart shows that DC Universe has acquired a significant share in 2019 Q1, this has mostly come from the shares of platforms other than Netflix.

## Demand distribution of a selection of top digital originals in South Africa

Show position in Demand Distribution (Q1 2019)

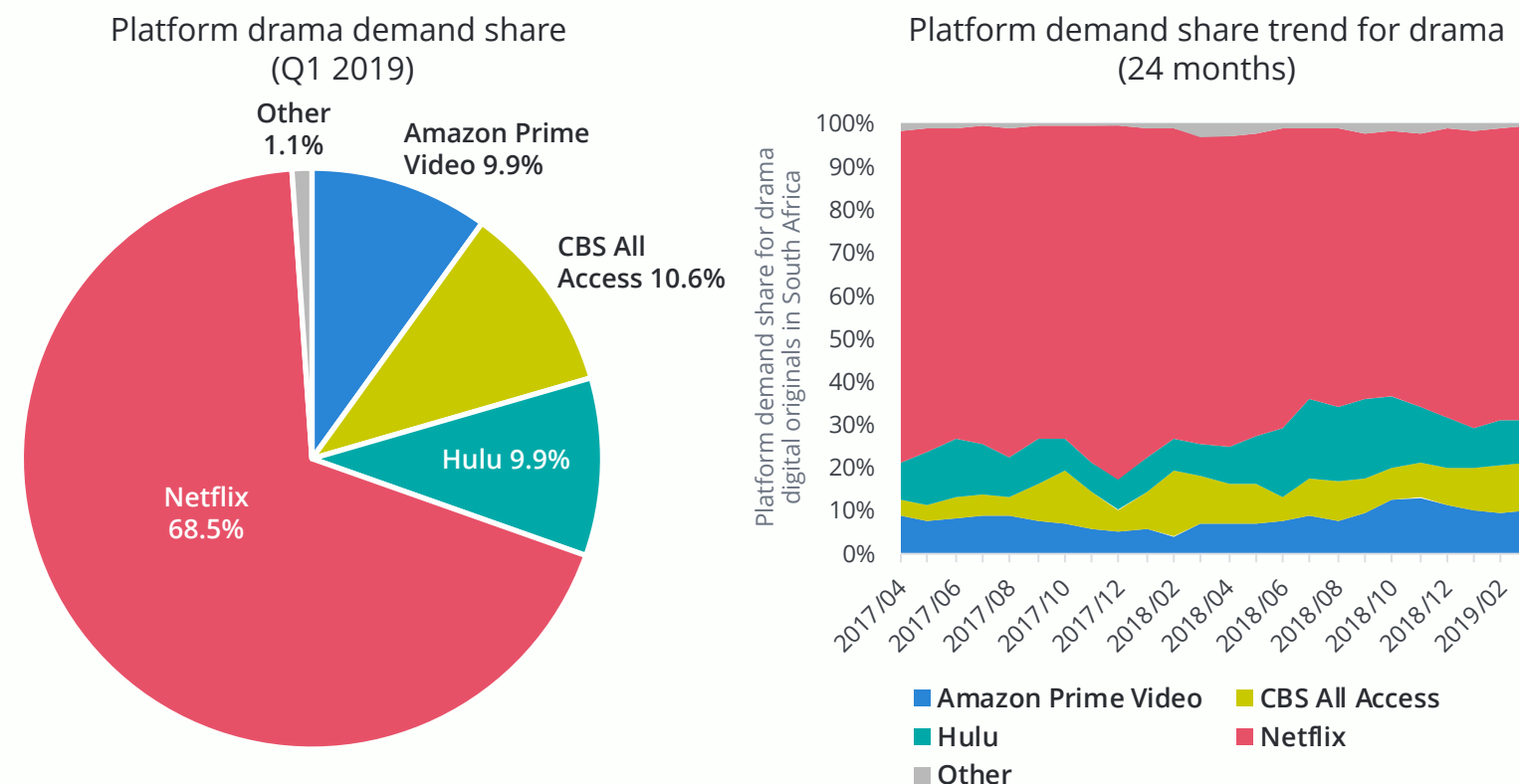


- The most in-demand digital original series in Q1 2019 for South Africa is Netflix's **The Umbrella Academy**.
- Completing the three titles with the highest demand are Netflix's **You** and Amazon Prime Video's **The Grand Tour**.
- The animated comedy **Big Mouth** and the drama **Shadow**, both from Netflix, rank higher in South Africa than in most markets.

# South Africa platform demand share for drama and action/adventure digital originals

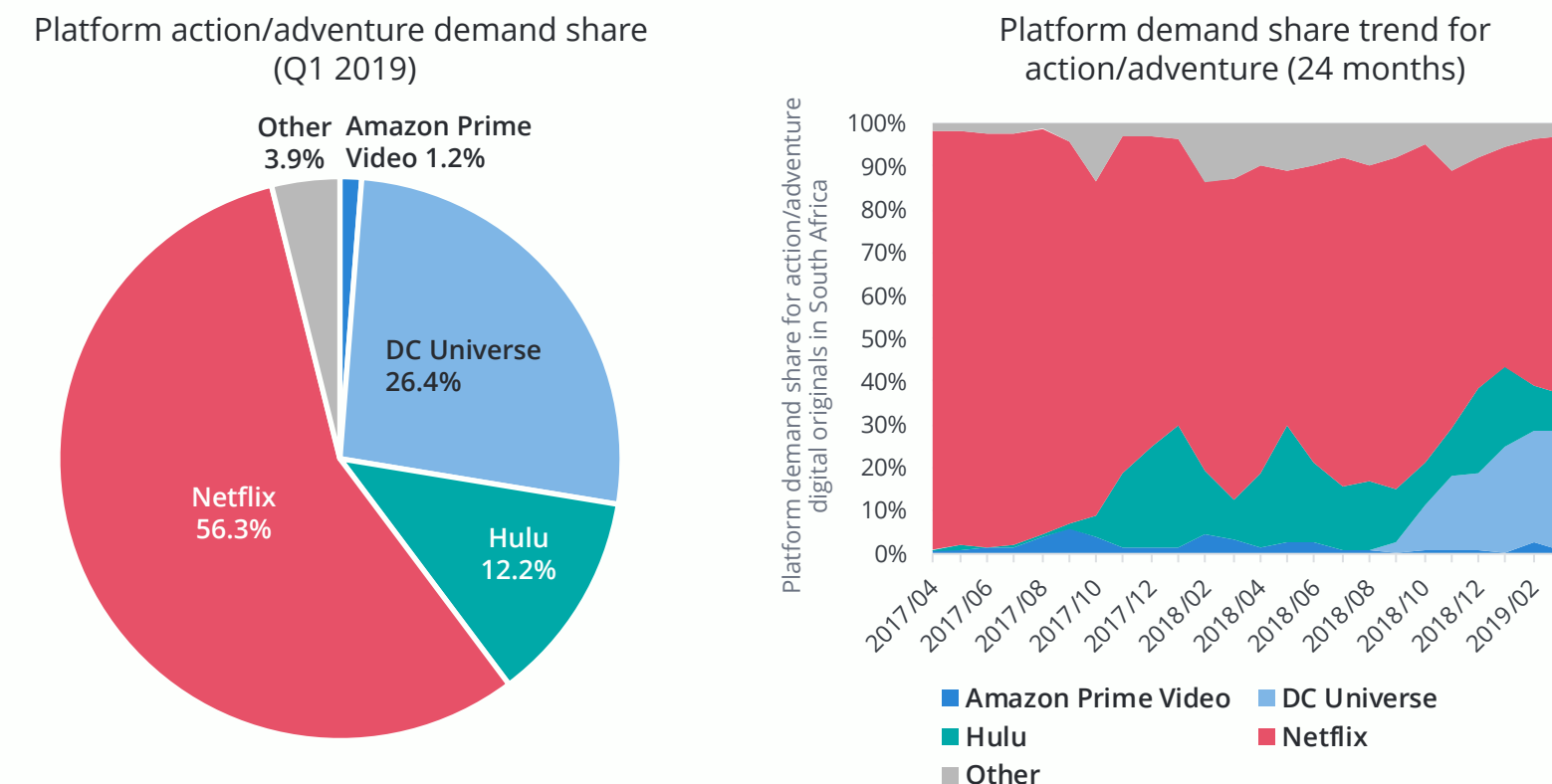
April, 2017 – March, 2019

## South Africa market demand share by original platform for drama digital originals



- Unlike the all genre platform demand share chart for South Africa, the drama digital original platform demand shares have no outliers and are close to the average of all markets in this report.
- With 68.5%, Netflix drama originals have the largest demand share.
- The 24 month trend for this market does not reveal any unusual patterns in demand shares recently.

## South Africa market demand share by original platform for action/adventure digital originals



- In 2019 Q1, Netflix originals have 56.3% share of the demand for action/adventure digital original titles in South Africa.
- DC Universe titles have 26.4% demand share and Hulu titles have 12.2%.
- The 24 month trend in platform demand for this genre shows Hulu titles have lost share recently. Hulu's 18.5% demand share of action/adventure originals at the start of Q1 was down to 8.7% by the end of the quarter.

# Top digital original series in South Africa

January – March, 2019

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

Series Name	In-Market Platform*	Original Platform	Genre	Average daily Demand Expressions (DEx) in Q1 2019	
1 <i>The Umbrella Academy</i>	Netflix	Netflix	Action and Adventure	2,478,533	
2 <i>You</i>	Netflix	Netflix	Drama	2,281,789	
3 <i>The Grand Tour</i>	Amazon Prime Video	Amazon Prime Video	Sports	2,255,687	
4 <i>13 Reasons Why</i>	Netflix	Netflix	Drama	2,088,062	
5 <i>Narcos</i>	Netflix	Netflix	Drama	2,074,020	
6 <i>Stranger Things</i>	Netflix	Netflix	Drama	2,023,220	
7 <i>Marvel's The Punisher</i>	Netflix	Netflix	Action and Adventure	1,994,286	
8 <i>Orange Is The New Black</i>	Netflix	Netflix	Comedy	1,883,121	
9 <i>Marvel's Runaways</i>	ShowMax	Hulu	Action and Adventure	1,784,483	
10 <i>The Handmaid's Tale</i>	ShowMax	Hulu	Drama	1,659,800	
11 <i>Star Trek: Discovery</i>	Netflix	CBS All Access	Drama	1,633,639	
12 <i>Big Mouth</i>	Netflix	Netflix	Animation	1,489,693	
13 <i>Marvel's Daredevil</i>	Netflix	Netflix	Action and Adventure	1,488,225	
14 <i>Titans</i>	Netflix	DC Universe	Action and Adventure	1,442,764	
15 <i>The Last Kingdom</i>	Netflix	Netflix	Drama	1,356,959	
16 <i>Ozark</i>	Netflix	Netflix	Drama	1,220,294	
17 <i>Young Justice</i>	Netflix	DC Universe	Action and Adventure	1,216,756	
18 <i>Doom Patrol</i>	--	DC Universe	Action and Adventure	1,186,886	
19 <i>Chilling Adventures Of Sabrina</i>	Netflix	Netflix	Horror	1,150,275	
20 <i>House Of Cards</i>	Netflix	Netflix	Drama	1,144,457	

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

27 <i>The Good Fight</i>	Amazon Prime Video	CBS All Access	Drama	807,752	
29 <i>Shadow</i>	Netflix	Netflix	Drama	785,148	
30 <i>Insatiable</i>	Netflix	Netflix	Comedy	726,106	
41 <i>Wayne</i>	YouTube Premium	YouTube Premium	Comedy	583,414	
49 <i>Homecoming</i>	Amazon Prime Video	Amazon Prime Video	Drama	502,336	

\* Distributor for most recent season in case of multiple platforms

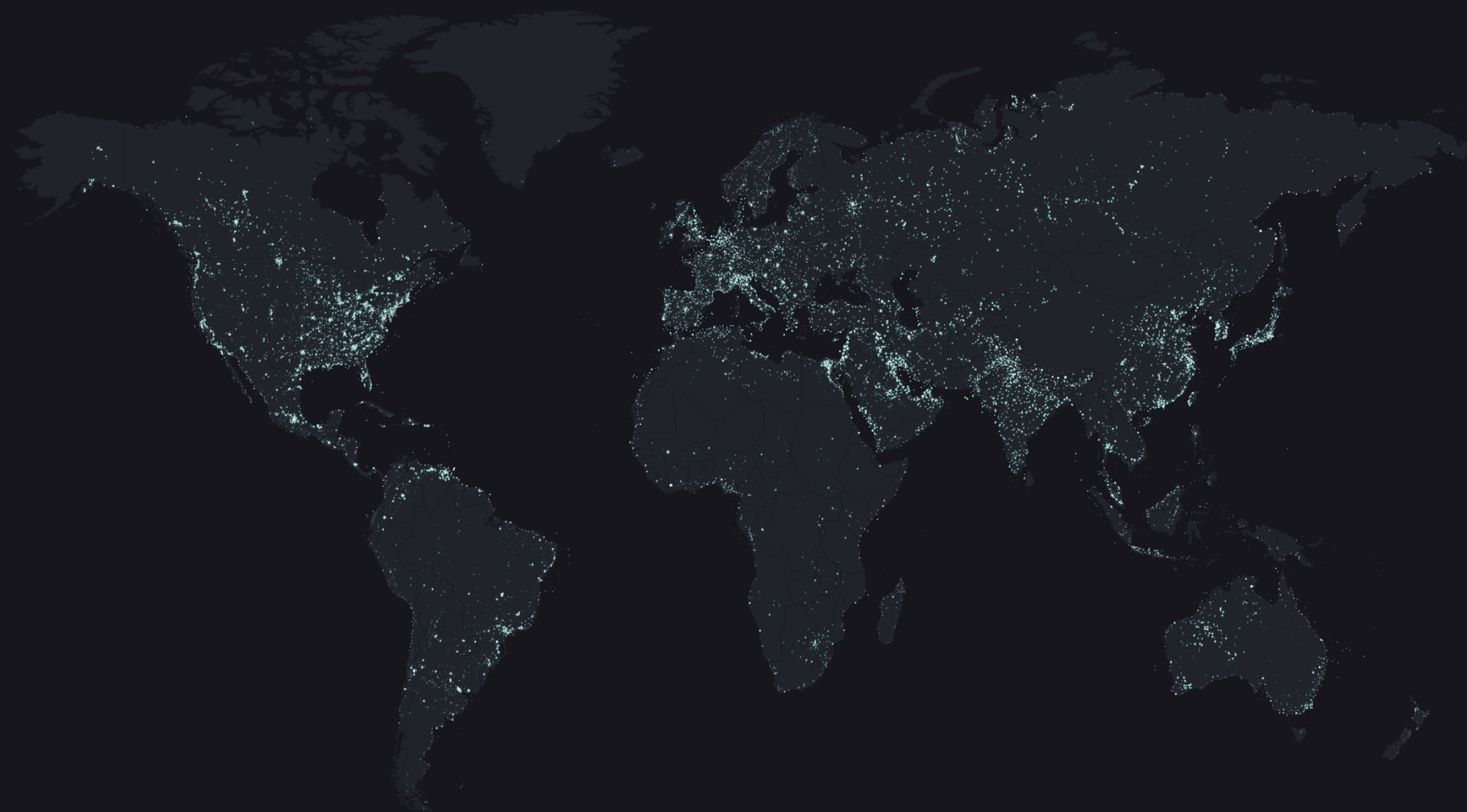
-- No platform information available, please refer to appendix

## Spotlight: China

### English-language digital original trends in China

In this section we investigate foreign content trends in China. Despite many Western services not presently operating or distributing their content in the Chinese market, we are able to demonstrate which Digital Originals are in high demand with Chinese audiences. We also reveal Chinese consumer preferences for specific genres and subgenres of foreign digital original content.

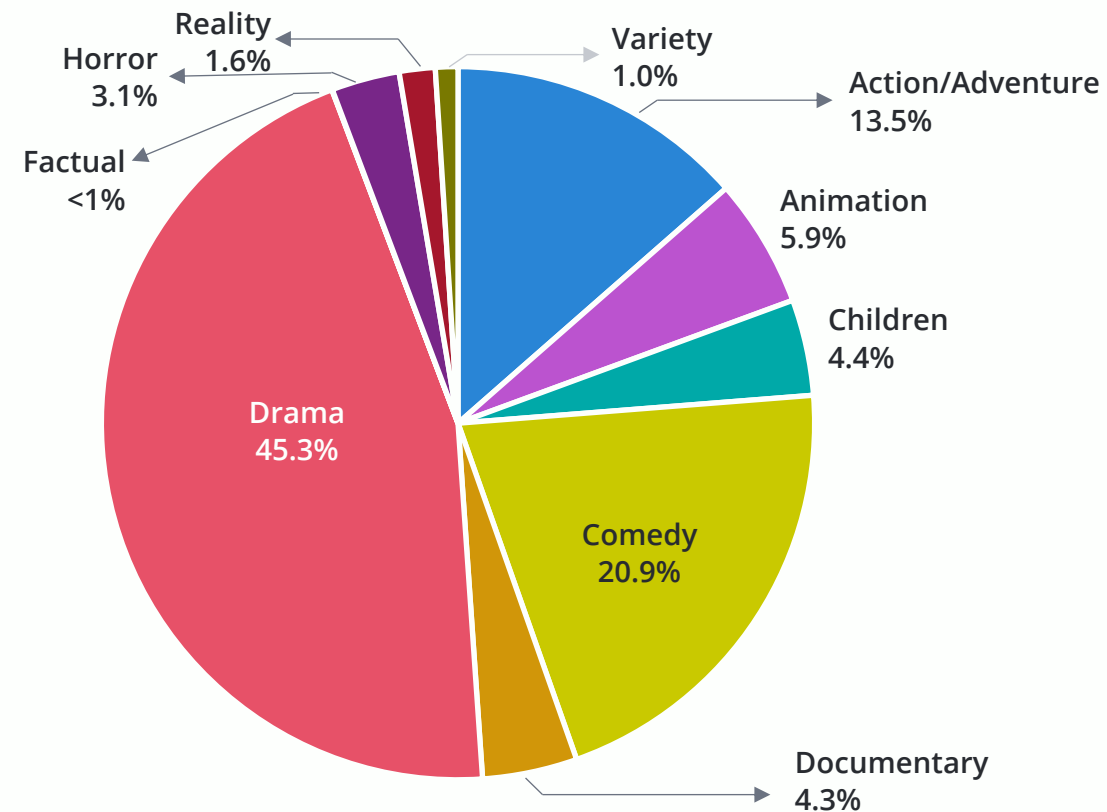
The demand share by genre, and the most in-demand subgenres of English-language digital original series, indicate **which type of content would work well either distributed in China or adapted into a local Chinese series.**



# Spotlight: China | English-language digital original genre and subgenre preferences

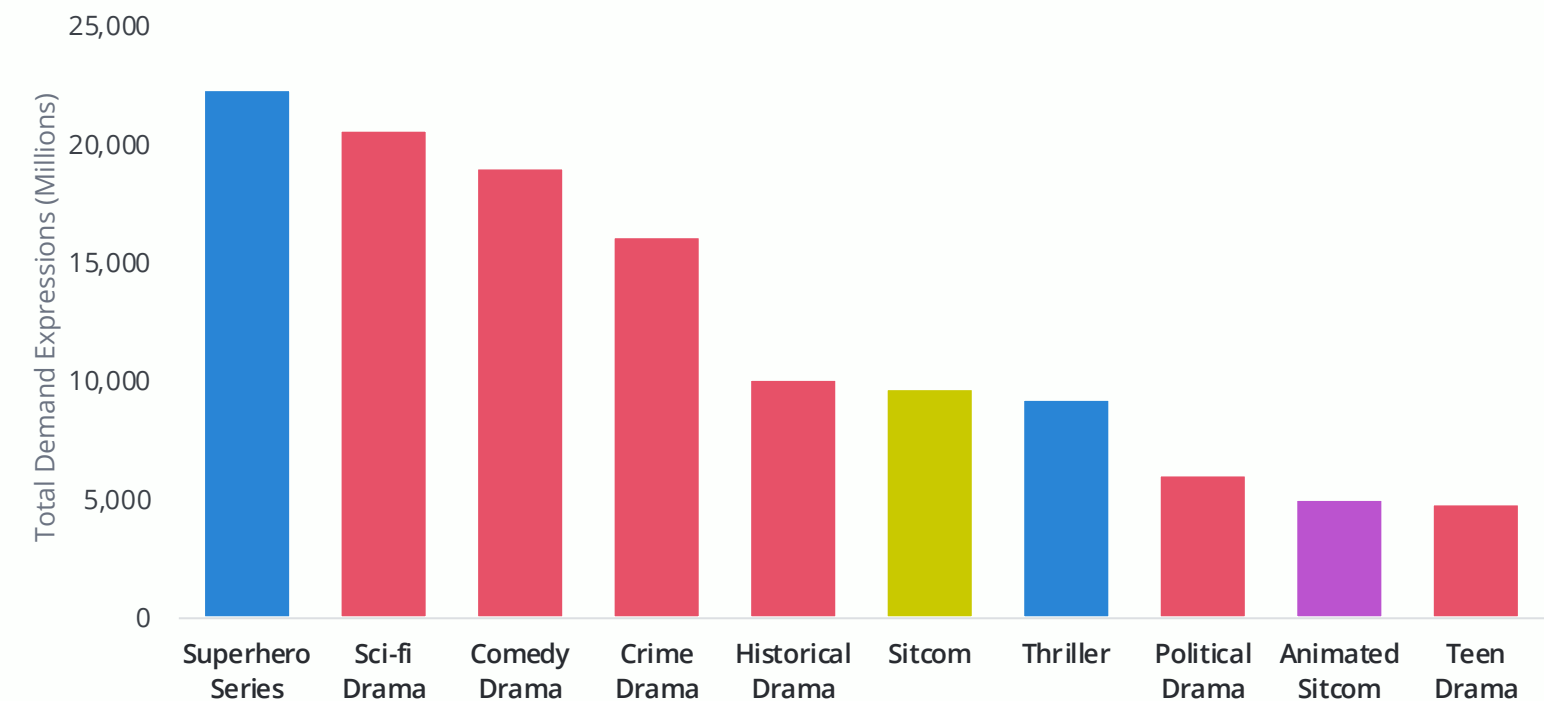
January – March, 2019

English-language digital original series genre demand share in China (Q1 2019)



- The most demanded type of English-language digital original series in China is drama with 45.3% of demand expressed for this genre.
- The second largest genre for English-language imports into China is comedy, which accounts for 20.9% of the demand.
- The proportion of demand for action/adventure is 13.5%, followed by animation titles with 5.9%

The 10 most in-demand English-language subgenres for digital originals in China (Q1 2019)



- This chart shows the top ten subgenres by size of the 2019 Q1 Chinese demand for English-language digital originals in each subgenre.
- English-language drama imports are favored strongly: 6 of the 10 subgenres belong to drama with sci-fi drama being the largest subgenre.
- English-language sitcoms are the most demanded comedy subgenre and animated sitcoms are also in high demand in China.

# Spotlight: China | The top English-language digital original series in China

January – March, 2019

## The top 20 most in-demand English-language digital original series:

Series Name	Original Platform	Genre	Average daily Demand Expressions (DEx) in Q1 2019
1 <i>House Of Cards</i>	Netflix	Drama	44,178,040
2 <i>Star Trek: Discovery</i>	CBS All Access	Drama	39,050,210
3 <i>Narcos</i>	Netflix	Drama	38,843,009
4 <i>The Grand Tour</i>	Amazon Prime Video	Sports	38,022,217
5 <i>Black Mirror</i>	Netflix	Drama	35,987,777
6 <i>Marvel's The Punisher</i>	Netflix	Action and Adventure	34,607,310
7 <i>Titans</i>	DC Universe	Action and Adventure	33,553,543
8 <i>Sex Education</i>	Netflix	Comedy	33,425,170
9 <i>The Last Kingdom</i>	Netflix	Drama	30,901,681
10 <i>The Marvelous Mrs. Maisel</i>	Amazon Prime Video	Comedy	30,232,992
11 <i>Orange Is The New Black</i>	Netflix	Comedy	27,480,138
12 <i>Marvel's Runaways</i>	Hulu	Action and Adventure	27,111,976
13 <i>Young Justice</i>	DC Universe	Action and Adventure	26,989,064
14 <i>Marvel's Daredevil</i>	Netflix	Action and Adventure	26,800,836
15 <i>Love Death And Robots</i>	Netflix	Drama	26,497,500
16 <i>Stranger Things</i>	Netflix	Drama	26,153,287
17 <i>BoJack Horseman</i>	Netflix	Animation	26,116,103
18 <i>13 Reasons Why</i>	Netflix	Drama	25,339,122
19 <i>You</i>	Netflix	Drama	24,357,312
20 <i>The Handmaid's Tale</i>	Hulu	Drama	23,630,688

- The English-language digital original series with the most 2019 Q1 demand in China is ***House Of Cards***, the political drama from Netflix.
- Other English-language digital originals sought out by Chinese audiences include CBS All Access' ***Star Trek: Discovery***, Amazon Prime Video's ***The Grand Tour*** and ***Narcos*** and ***Black Mirror*** from Netflix.

- Hulu's dystopian sci-fi drama ***The Handmaid's Tale*** is the 20<sup>th</sup> most in-demand title. This is noticeably lower than the ranking in other markets for Q1 and suggests the appetite for series like this is lower in China.

\* Distributor for most recent season in case of multiple platforms

-- No platform information available, please refer to appendix

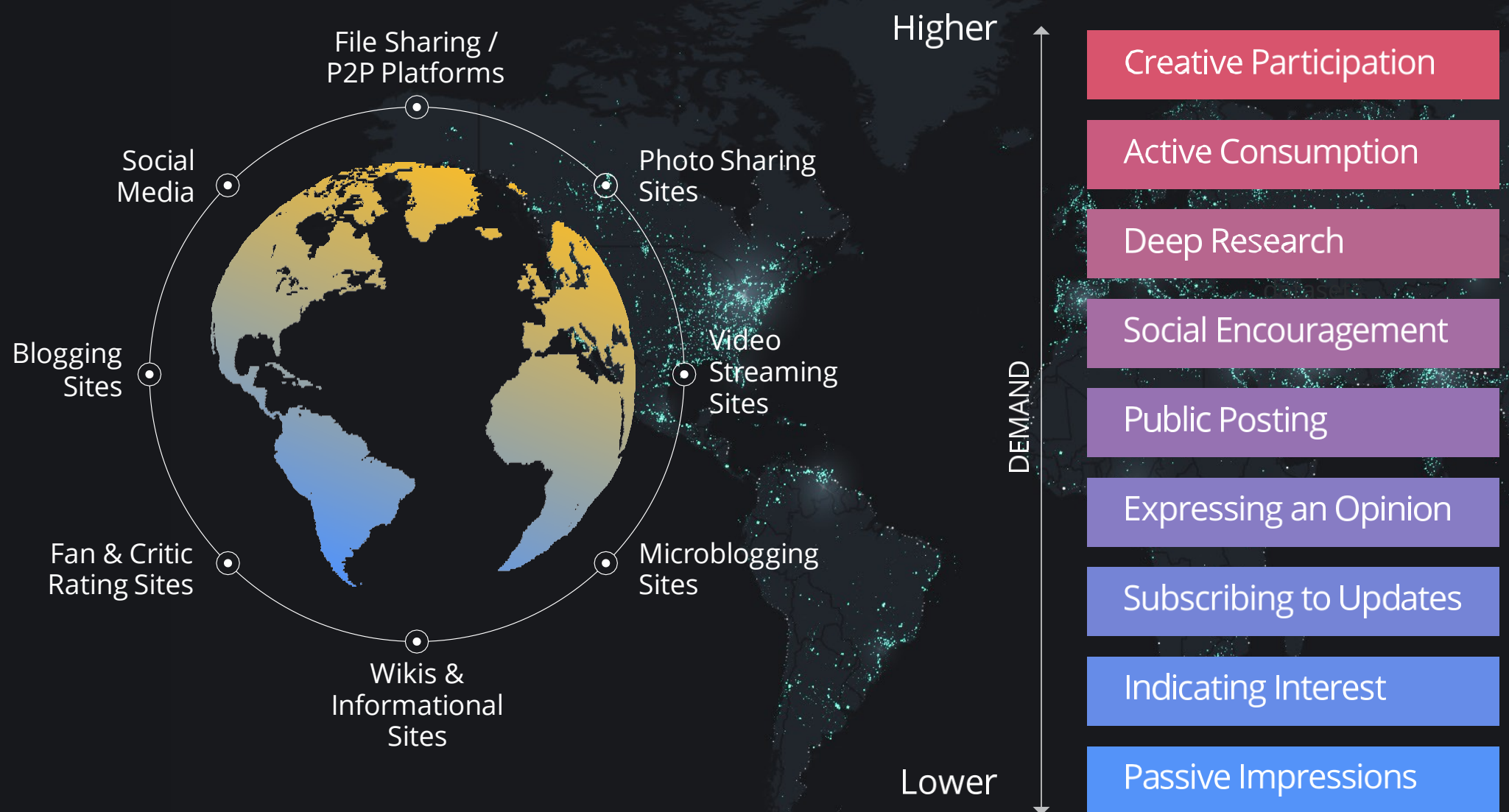
## Appendix

# 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



We capture the world's largest audience behavior datasets

We clean, enrich, combine and analyze the data



## GLOBAL DEMAND FOR CONTENT



Across platforms



In all languages



In all markets

We provide TV's only global content demand measurement system

## 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”.

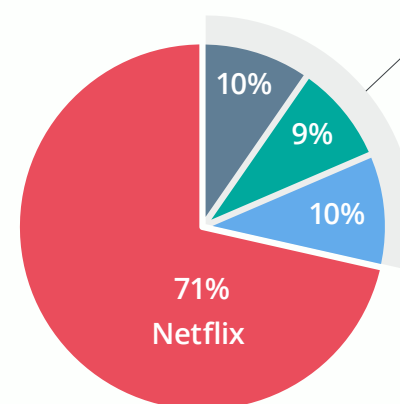
Because our global demand measurement system incorporates multiple country-specific content demand signals, we are able to gauge popularity for TV content long before a series, or platform, is officially released in its home market, or any othermarket.

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).

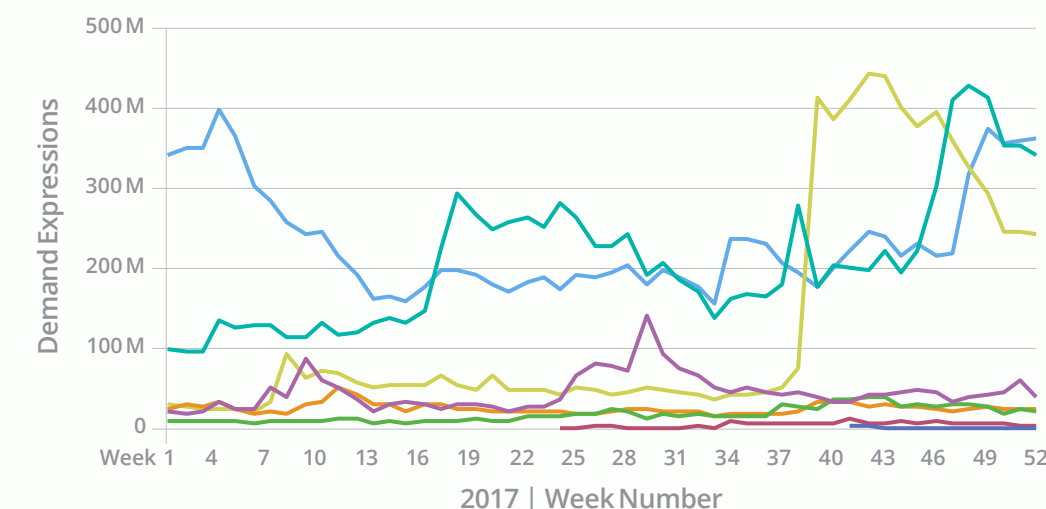
For more information please refer to our helpdesk article available [here](#).

Total share of demand for platforms in 2017

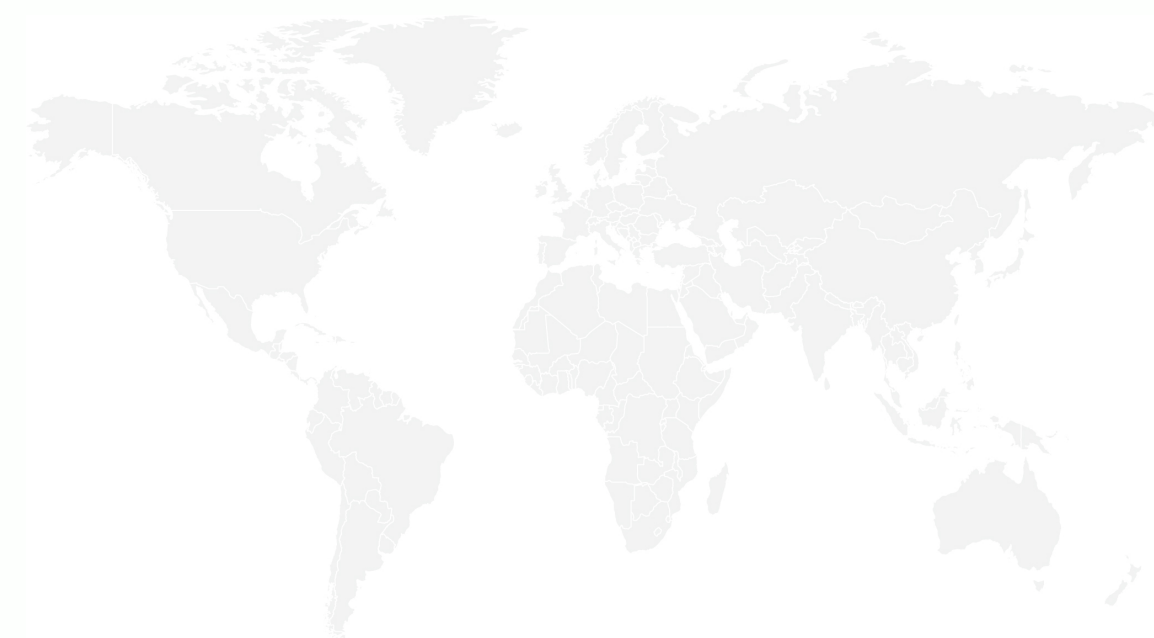


Other Platforms  
(CBS All Access, Crackle, Facebook, Apple Music, Seeso, Youtube Red)

Total platform demand in 2017 (ex. Netflix)



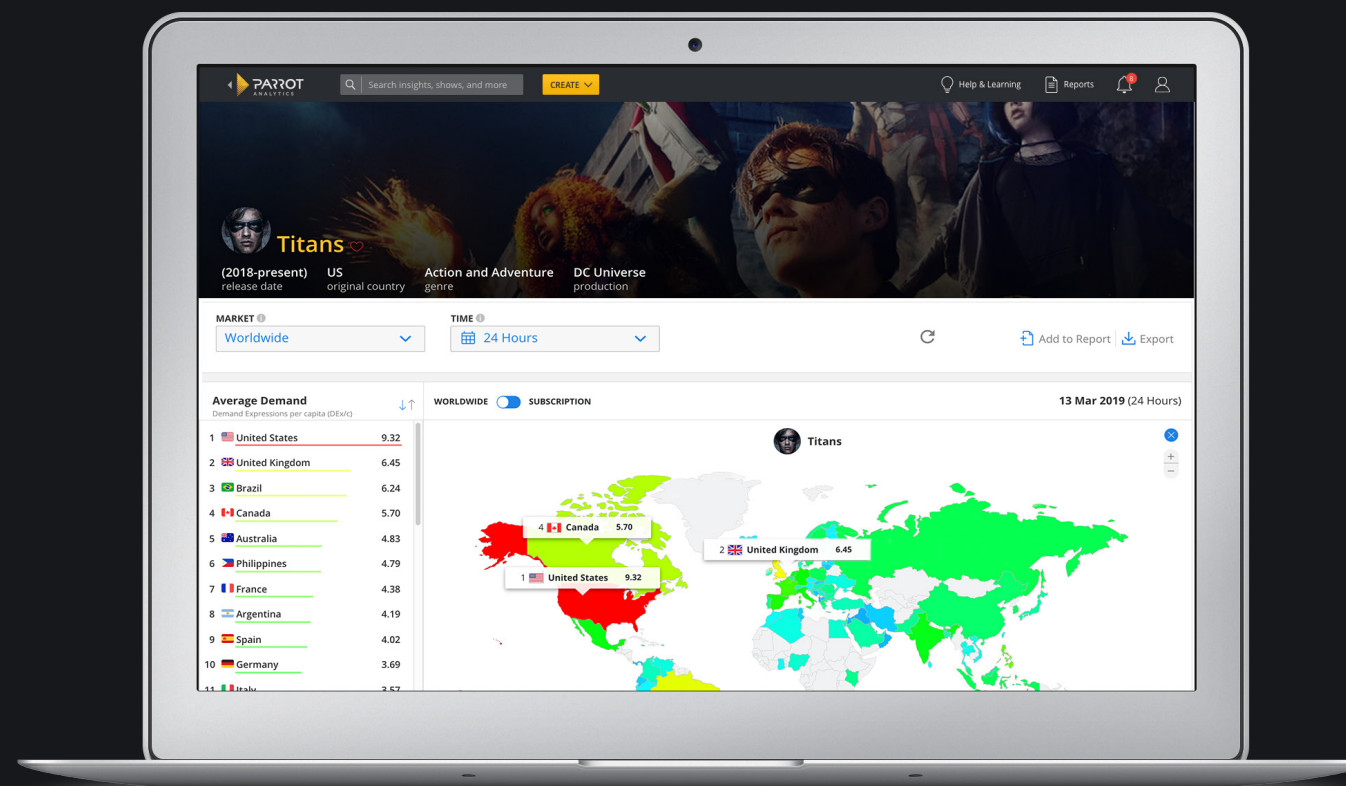
Amazon Video   CBS All Access   Facebook   Seeso  
Hulu   Crackle   Apple Music   YouTube Premium



# 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.

[Contact Us](#)



# Unlocking the magic of content

- SOCIAL
  - GENOME
  - AFFINITY
  - TRENDS
  - TRAVELABILITY
  - DEMAND
  - DEMOGRAPHICS
  - SENTIMENT
  - DISCOVERY
  - RECOMMENDATIONS
- BRAND ○
- GENRE ○
- TITLE ○
- PLATFORM ○
- MARKET ○
- TIME ○

SCIENCE

PARROT  
ANALYTICS

ART

