



2021 REPORT

# The Global Television Demand Report

Global SVOD Platform Demand Share, Digital Original Series Popularity, and Genre Demand Share Trends in 2021

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# Introduction

## 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.**

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



# Executive Summary

## Major SVOD events in 2021

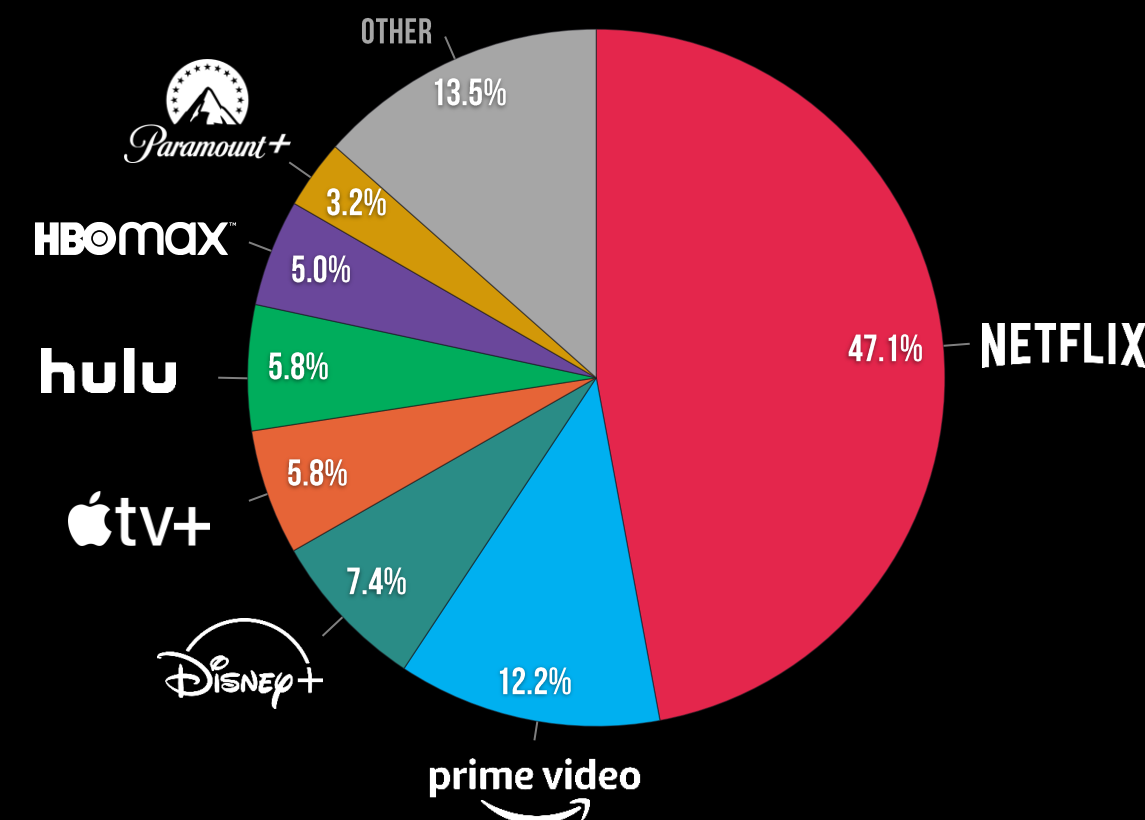
GLOBAL

- CBS All Access was rebranded to Paramount+ in March as ViacomCBS focused its attention on the streaming wars. In addition to the relaunch, the platform expanded into new markets such as Latin America, Nordic countries, and Australia. Further underscoring the company's unified direction and focus on streaming, ViacomCBS announced in February 2022 that it was rebranding as Paramount.
- Comcast and ViacomCBS announced SkyShowtime, a combined streaming service for audiences outside of the United States that will try and create a valuable bundle of highly in-demand original titles and library content to take on more established competition, including Netflix and Disney, in markets like EMEA.
- In 2021, Apple TV+ grew from a service that people didn't understand to one that shot up in originals demand share and has established itself as a strong player.
- Netflix bought Squid Game for \$22 million and created its biggest series ever. The show was the most globally in-demand new premiere of the year and ushered in a wave of South Korean dramas which found audiences across Europe, LATAM, and the US.
- HotStar, which represents 35% of Disney+'s entire subscriber base, helped the Mouse House reach 118 million Disney+ subscribers as Disney pulls ahead of competition in the all-important Indian market.
- HBO Max found its breakout year in part due to original programming targeted at a younger, female demographic that brought in new subscribers and increased engagement as demand for those non-HBO originals started to grow. Additionally, it began its international expansion this year first to Latin American and then in select European markets.

## Global platform demand share for all digital originals | 2021

GLOBAL

- 2021 was the first year that Netflix's originals accounted for less than 50% of global demand for all digital originals. The streamer's dominant position was under assault on multiple fronts as several of its rivals expanded this year.
- Disney+ saw the greatest growth in its global demand share this year as it rolled out Phase Four of the Marvel Cinematic Universe on its platform. It more than doubled its demand share from 2020 (3.6%).
- Both HBO Max and Apple TV+ saw strong growth in their share of demand for original series as both platforms scaled their originals. In 2020, the platforms had a 3.6% and 3.9% share of demand respectively.



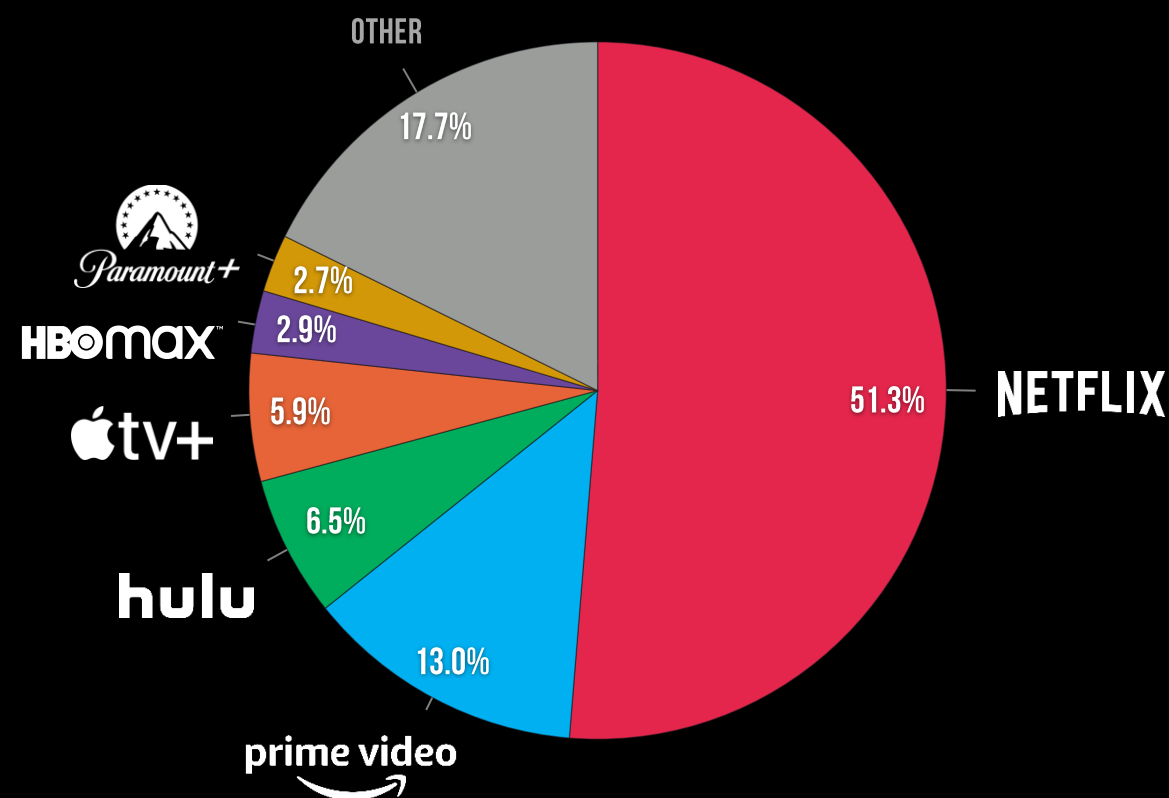


# Executive Summary

## Global platform demand share for **drama** digital originals in 2021

GLOBAL

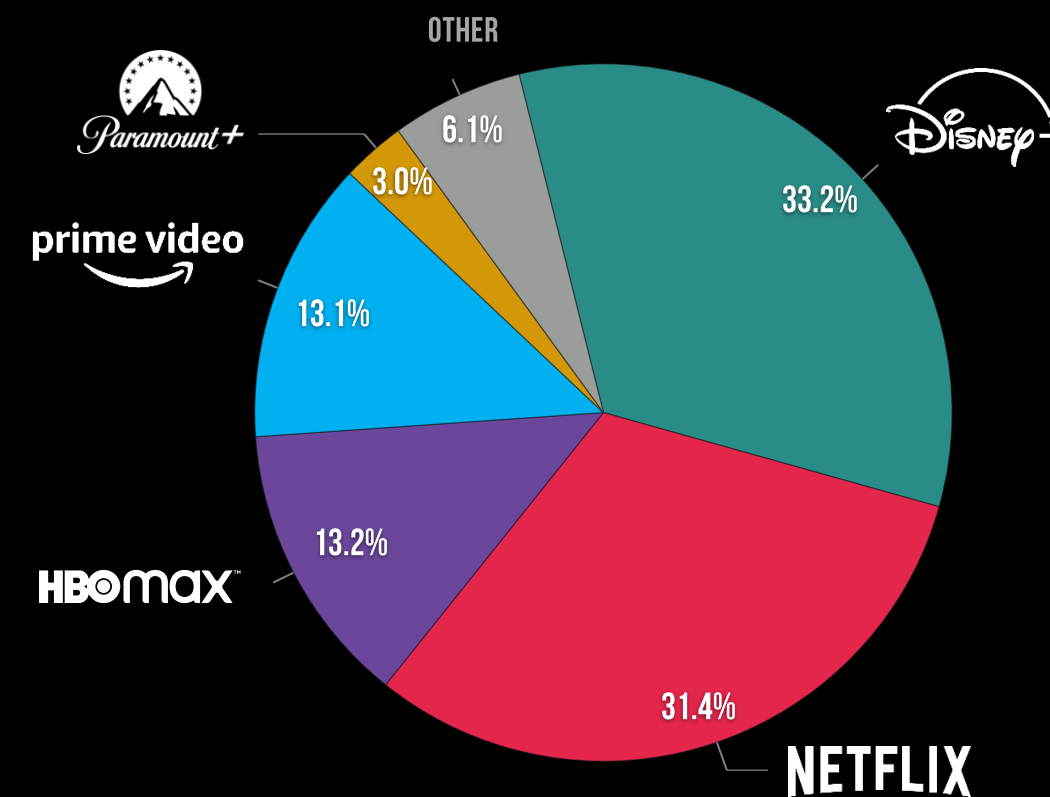
- Netflix managed to hold onto a slim majority of demand for original dramas in 2021. 51.3% of global demand for drama originals was for a Netflix original.
- The ranking of the top four platforms by global drama demand share didn't change from last year. Amazon Prime, Hulu, and Apple TV+ trailed Netflix in that order both in 2020 and this year.
- The share of demand for original series from 'Other' platforms increased to 17.7% this year as regional and niche streaming platforms grew demand for their original dramas. Local platforms like Movistar+ and streamers focused on niche content like Crunchyroll and Shudder are some examples of platforms in this category.

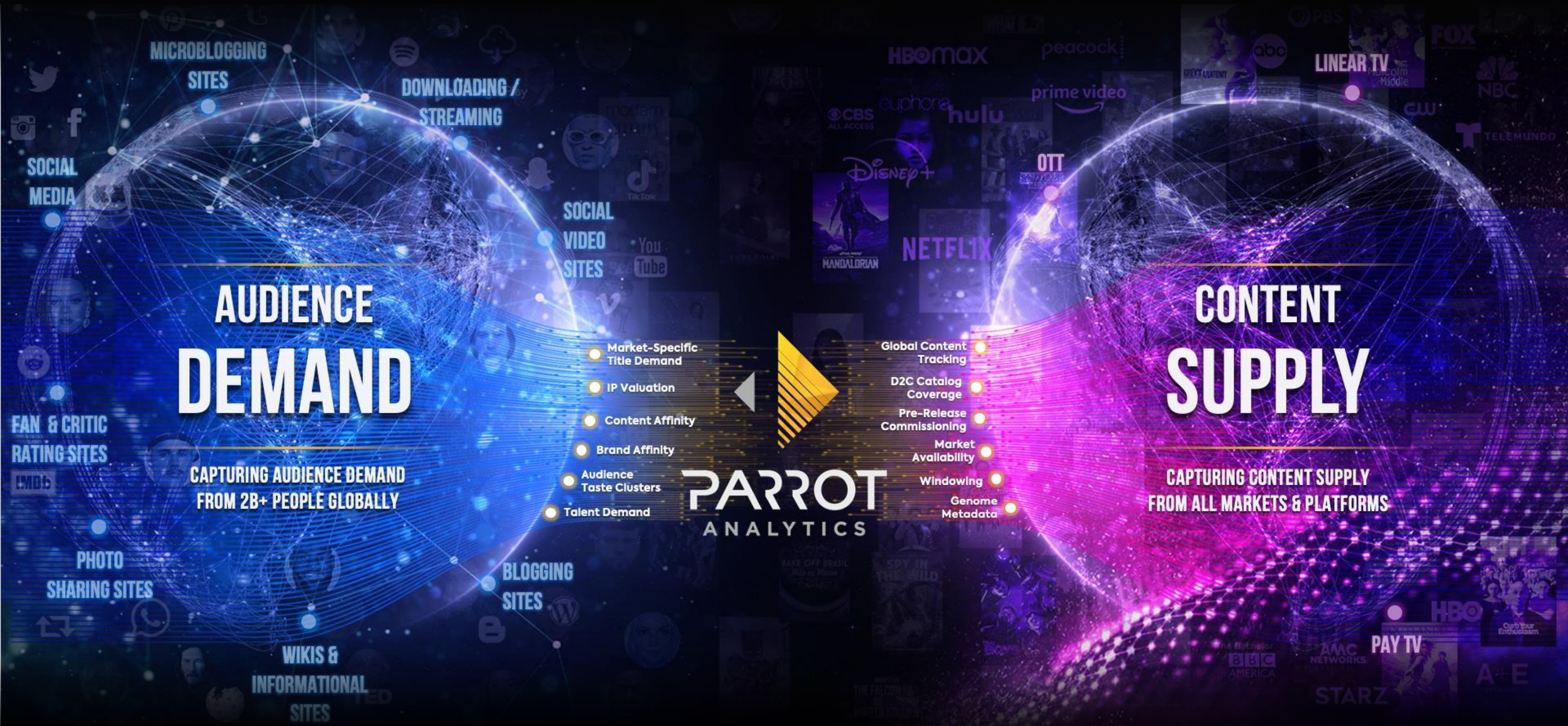


## Global platform demand share for **action/adventure** digital originals in 2021

GLOBAL

- The action/adventure genre saw the most upheaval this year as Disney+ focused most of its original content expansion in this genre. Disney+ grew its action/adventure originals demand share to 33.2% from 13.8% in 2020.
- All other platforms shown here lost demand share this year because of the aggressive growth from Disney+.
- The most noticeable change has been in the HBO Max's demand share. At one time it was vying with Netflix for the top spot in the genre, but as the platform has focused on growing its originals beyond DC Universe action series its demand share has fallen to be neck and neck with Amazon.





# AUDIENCE DEMAND

CAPTURING AUDIENCE DEMAND FROM 2B+ PEOPLE GLOBALLY

- Market-Specific Title Demand
- IP Valuation
- Content Affinity
- Brand Affinity
- Audience Taste Clusters
- Talent Demand

**PARROT**  
ANALYTICS

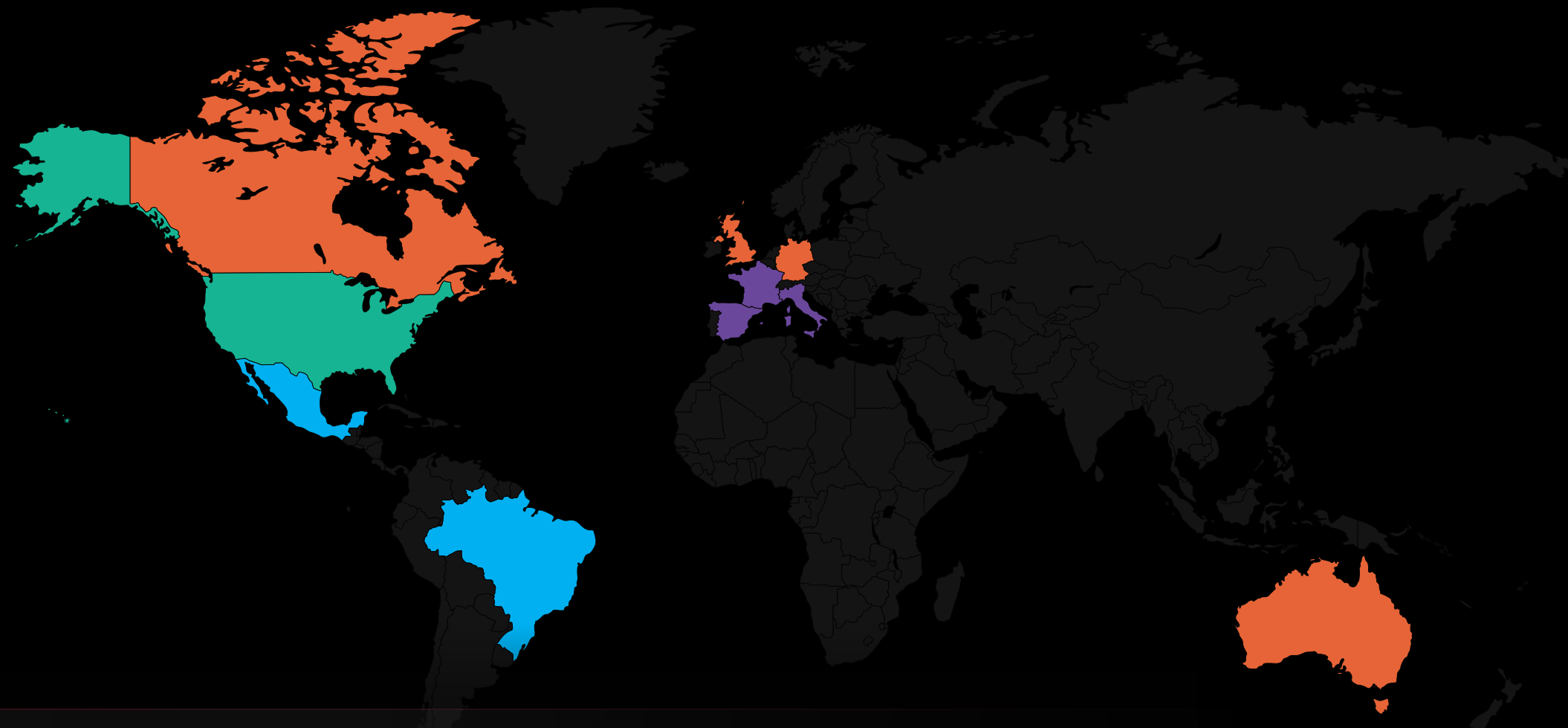
- Global Content Tracking
- D2C Catalog Coverage
- Pre-Release Commissioning
- Market Availability
- Windowing
- Genome Metadata

# CONTENT SUPPLY

CAPTURING CONTENT SUPPLY FROM ALL MARKETS & PLATFORMS



# #1 Most In-Demand Digital Originals by Market



## *The Mandalorian*

AUSTRALIA  
CANADA  
GERMANY  
UNITED KINGDOM



## *La Casa de Papel (Money Heist)*

FRANCE  
ITALY  
SPAIN



## *WandaVision*

BRAZIL  
MEXICO



## *Stranger Things*

UNITED STATES

In 2021, a good variety of shows representing several platforms took the top spot as most in-demand original series across markets in this report.

Some regional patterns become clear when looking at the most in-demand show for the year by market. *WandaVision* was the most in-demand digital original in the two Latin American markets in the report, indicating high demand for Marvel content in this region. In Romance-speaking Europe *La Casa de Papel* was the most in-demand original, boosted by a strong series finale.

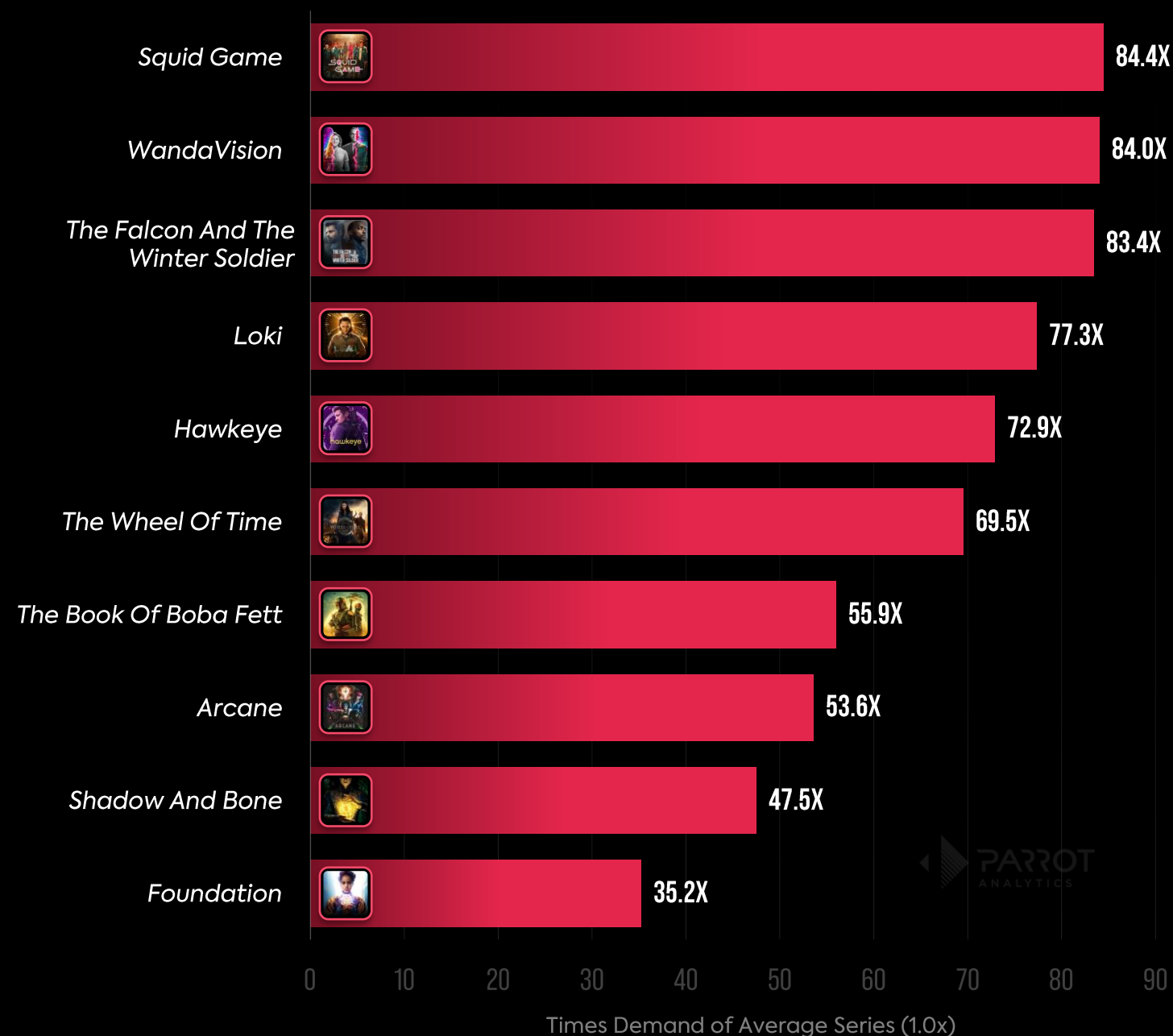
*Stranger Things* continued to be the most in-demand original in the United States. While the show is a global hit, it resonates with American audiences in particular. In all other markets covered, *The Mandalorian* was the most in-demand original.



# Most In-Demand Premieres of 2021

Global demand in the first 30 days following release

GLOBAL



In general, the shows that reach the highest levels of demand for the year are not new. That's why here we focus specifically on the shows that had the most successful premieres in their first 30 days this year.

- The new show with the highest global demand in its first 30 days was *Squid Game*. In its first 30 days it reached 84.4 times the average series demand globally. This achievement is all the more impressive because it happened in 2021, a year dominated by enormous Marvel premieres from Disney+.
- Of these new Marvel series, the first one had the most in-demand premiere. *WandaVision* had 84 times the average series demand globally in its first 30 days, falling just short of the top spot. Interestingly each new Marvel series premiere had less demand than its predecessor. This pattern could point to franchise fatigue, a risk that franchise-dependant Disney+ should be aware of.
- *The Wheel of Time*, Amazon Prime Video's biggest release of the year, ranked as the sixth most in-demand new series premiere globally with 69.5 times the average series demand. The show was the most in-demand premiere in the US for the year, showing that it ultimately resonated with American audiences more than global viewers.
- Nine of the ten most in-demand series premieres this year were based on some form of existing IP. The Marvel series and *The Book of Boba Fett* both exist within larger universe. Shows like *The Wheel of Time*, *Shadow and Bone*, and *Foundation* looked to books for their source material. *Arcane* was unique in this list as the only show based on a video game.



## Demand Driving Conversations

### The New York Times

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#### *'Disney is Chipping Away at Netflix's Dominance'*

The New York Times reports on Netflix's earnings and what the platform's record low share of demand means for the streamer as it faces new streaming threats including a formidable Disney+.

### Bloomberg

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#### *'Will the Stars Ever Make Money in This Town Again?'*

Bloomberg takes a look at how talent compensation is changing and considers how talent demand will shape the future of how Hollywood measures and rewards talent.

### VARIETY

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#### *'What Metrics Matter Most? TV Industry Grapples with Ratings Shortcomings'*

Variety digs into the transformation of the TV industry, how a new era of measurement is emerging to meet the needs of the streaming era, and what metrics ultimately matter.

# MARKET-SPECIFIC TV CONTENT 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 genre 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.

# MARKET-SPECIFIC TV CONTENT TRENDS

 UNITED STATES	12	 GERMANY	39
 AUSTRALIA	18	 ITALY	45
 BRAZIL	23	 MEXICO	50
 CANADA	29	 SPAIN	55
 FRANCE	34	 UNITED KINGDOM	61





 UNITED STATES

 AUSTRALIA

 BRAZIL

 CANADA

 FRANCE

 GERMANY

 ITALY

 MEXICO

 SPAIN

 UNITED KINGDOM

# 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.

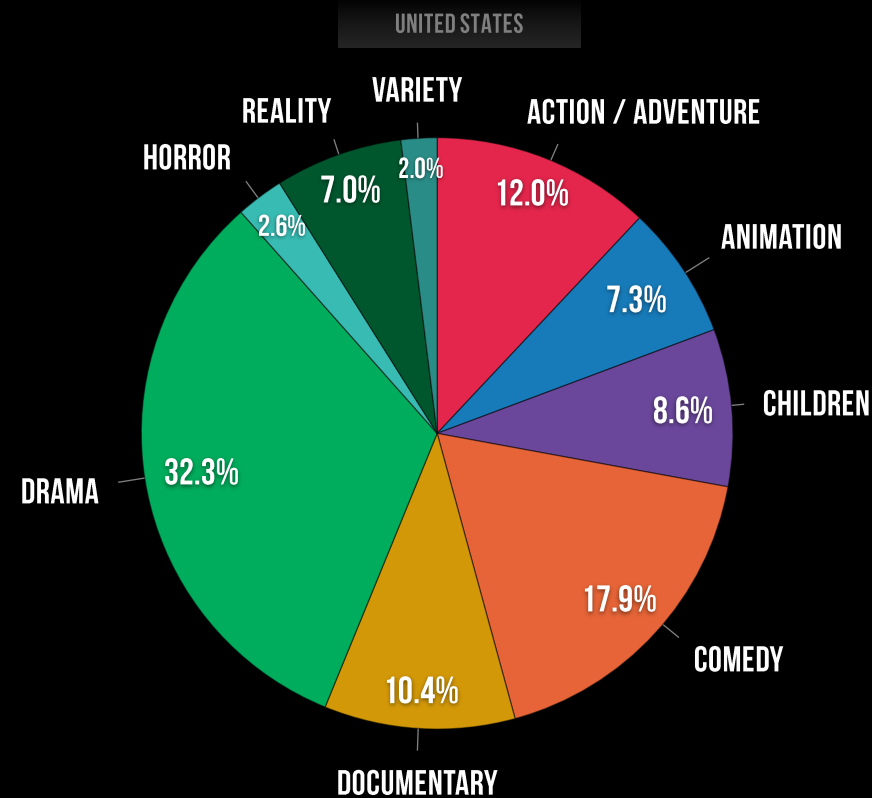


**NOTE:** The insights presented in this section are based on the entire available Parrot Analytics globalTV demand dataset, which is comprised of 3.5 trillion data points across 100+ languages in 100+ countries.

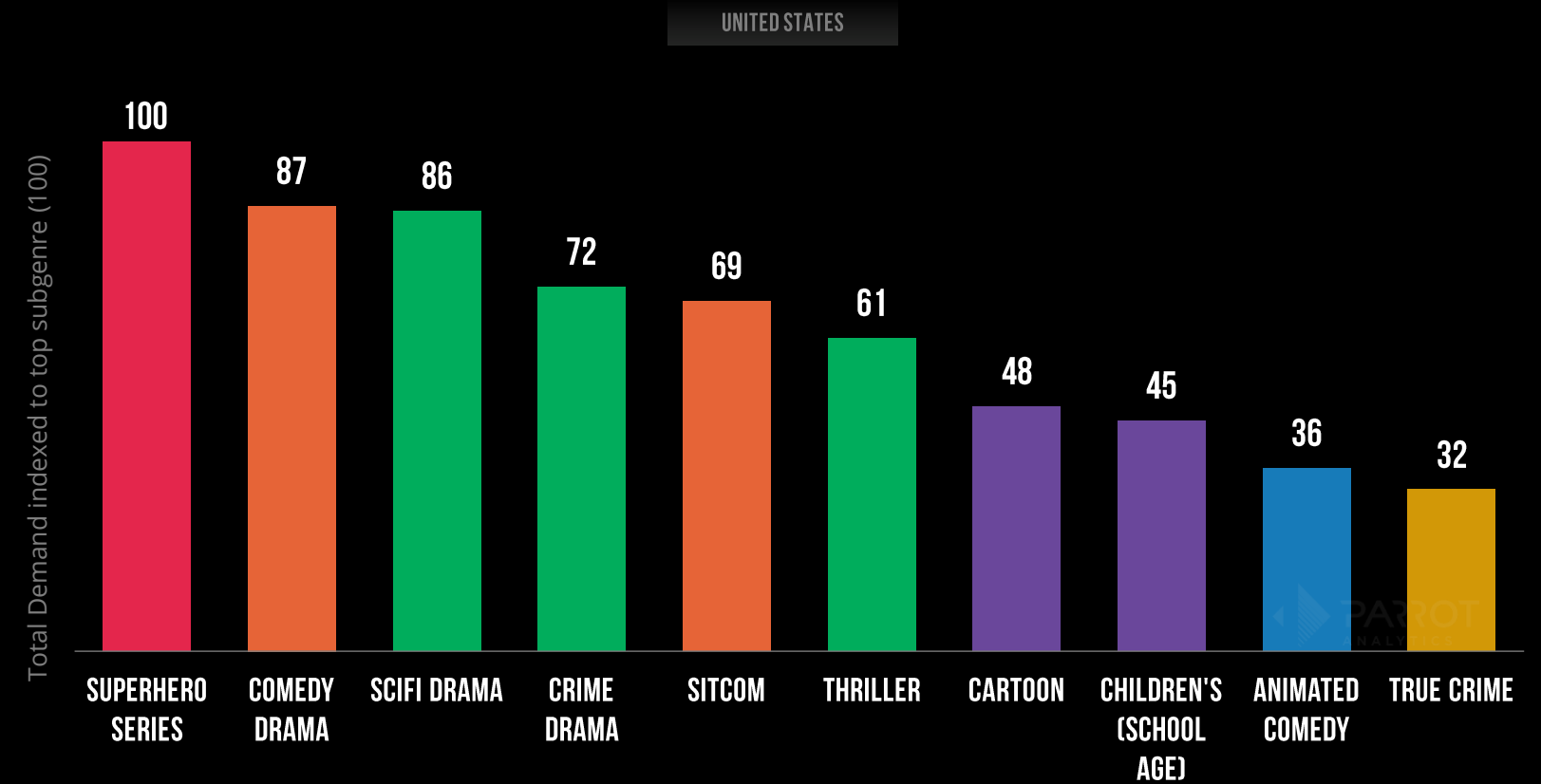


# United States Digital Original Genre and Subgenre Preferences

Digital original series **genre** demand share in 2021



The 10 most in-demand **subgenres** for digital originals in 2021



- The United States has the lowest demand share for drama originals in the report – 32.3%. It is the only market where drama captures less than 40% of demand. This was the first year where the genre accounted for less than a third of digital original demand in the US.
- Of all the markets in this report, the demand share is highest in the USA for digital original series in three genres – children’s (8.6%), documentary (10.4%), & reality (7.0%). All three of these genres grew their demand share in the US this year compared to 2020.
- Despite some of the biggest digital original premieres of the year being superhero series, the action/adventure genre’s share of demand actually shrank in the US this year, down from 12.8% in 2020.

- Comedy drama ranked higher in the US than any other market in this report. It was the second most in-demand digital original subgenre. However, the gap this year between comedy drama and the top ranked superhero series subgenre has grown from only 4% last year to a 13% difference in 2021.
- The US is the only market in this report where children’s school-age content ranked in the ten most in-demand subgenres for the year. It was the 8<sup>th</sup> most in-demand subgenre, just behind another children’s subgenre – cartoon.
- American’s love of documentaries is apparent here as well. The US was the only market in this report where a documentary subgenre, true crime, ranked in the ten most in-demand subgenres.



# United States Platform Demand Share and Digital Originals Demand Distribution

Market demand share by original platform for all digital originals

Demand distribution of a selection of top digital originals

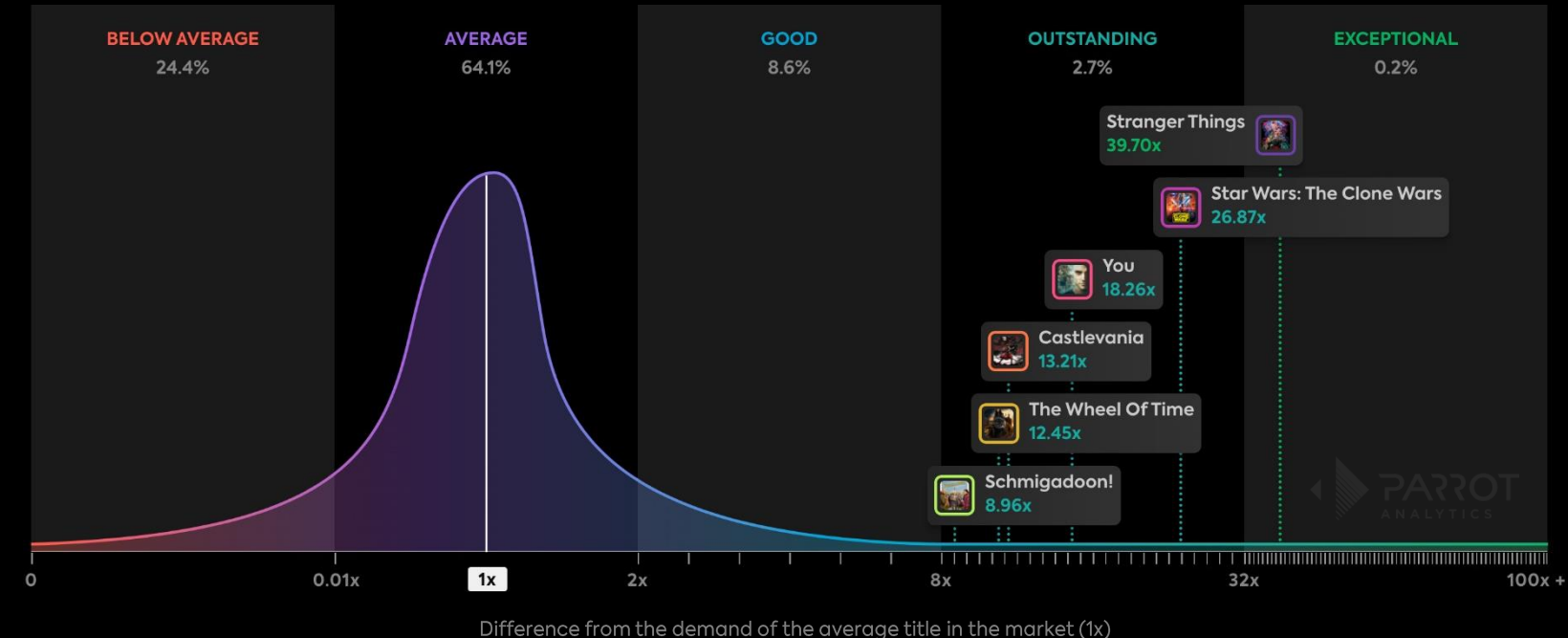
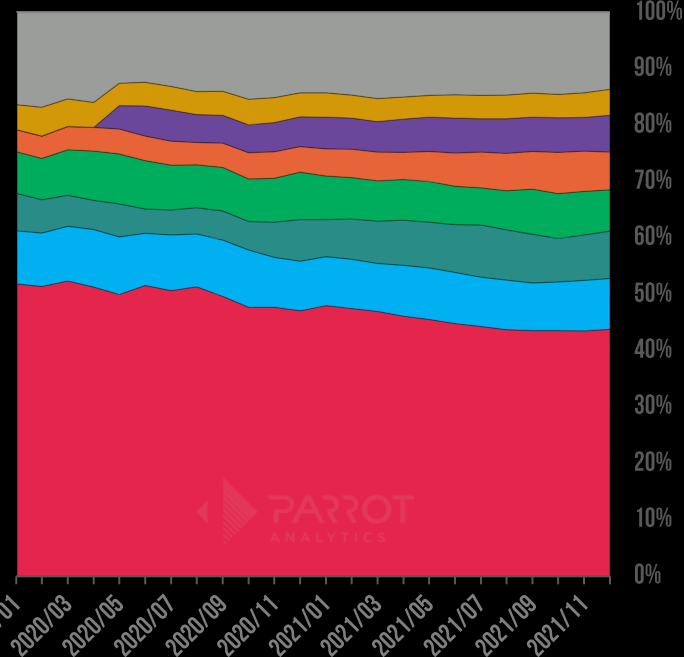
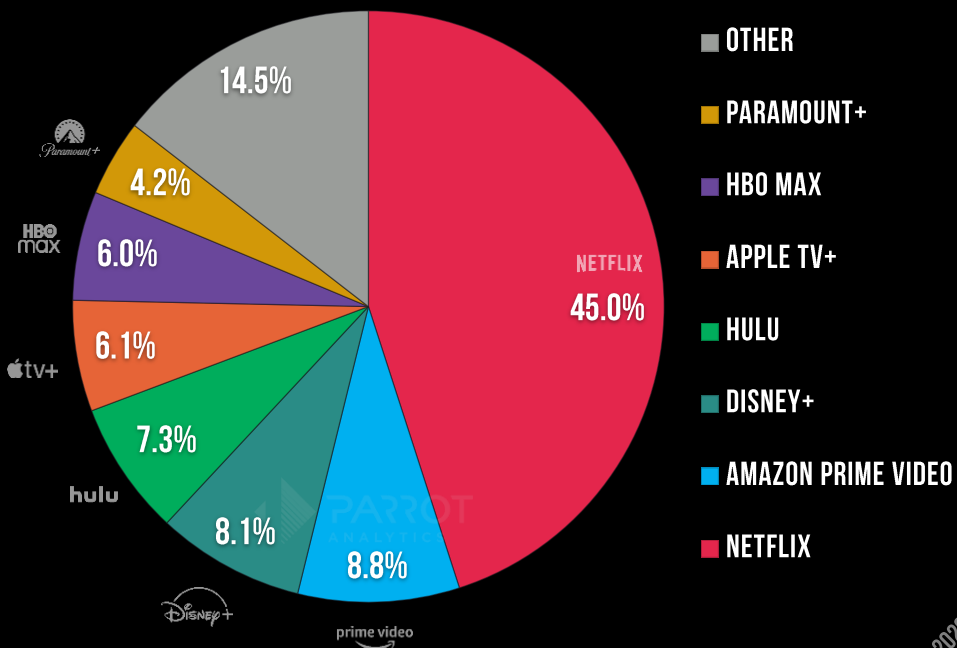
UNITED STATES

UNITED STATES

Demand share 2021

Demand share trend 24 MONTHS

Show position in demand distribution 2021



- Netflix titles accounted for 45% of demand for all digital original titles in the United States in 2021. This is a drop of 5.5% compared to its annual share of demand in 2020.
- Amazon Prime Video had the second largest share of demand for original content in the US in 2021 (8.8%). This has not been consistent for the entire year however. In each month of Q3 2021, Disney+ managed to have a larger share of US demand for its originals than Amazon Prime Video.
- The US is the market in this report with the largest share of demand for content from 'Other' platforms not broken out here (14.5%). This reflects a maturing streaming landscape with many platforms making original content for the market.

- The most in-demand digital original series in the United States for 2021 is **Stranger Things**. Despite having last released episodes in 2019, demand for the show has stayed high as fans eagerly await the next season.
- **Star Wars: The Clone Wars**, from Disney+, ranked higher in the US than any other market in this report. It was the 8<sup>th</sup> most in-demand digital original in 2021. Tie-ins to new episodes of **The Mandalorian** and **The Book of Boba Fett** kept this show relevant and in-demand this year.
- Apple TV+'s quirky musical comedy, **Schmigadoon!**, saw particular success in America this year where it had nearly 9 times the average series demand in 2021.



# United States Platform Demand Share for Drama and Action/Adventure Digital Originals

Market demand share by original platform for drama digital originals

Market demand share by original platform for action/adventure digital originals

UNITED STATES

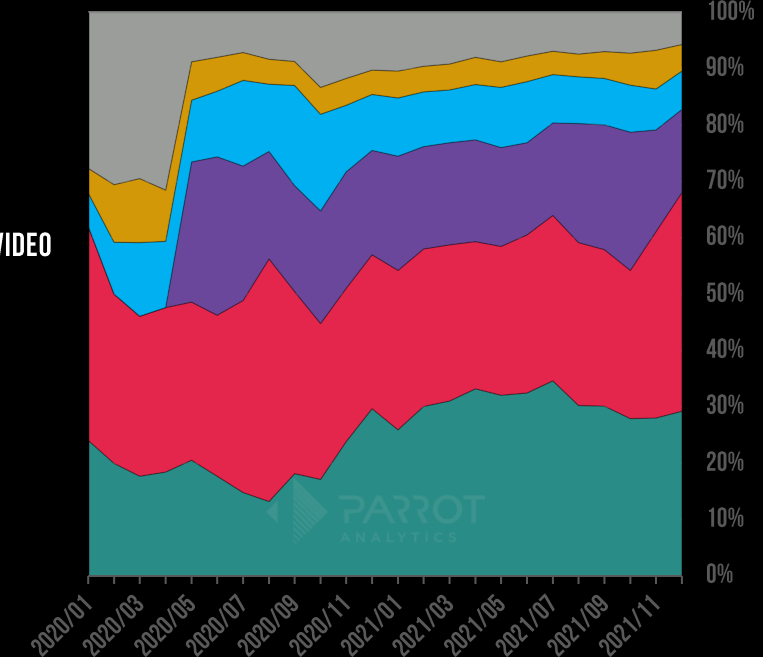
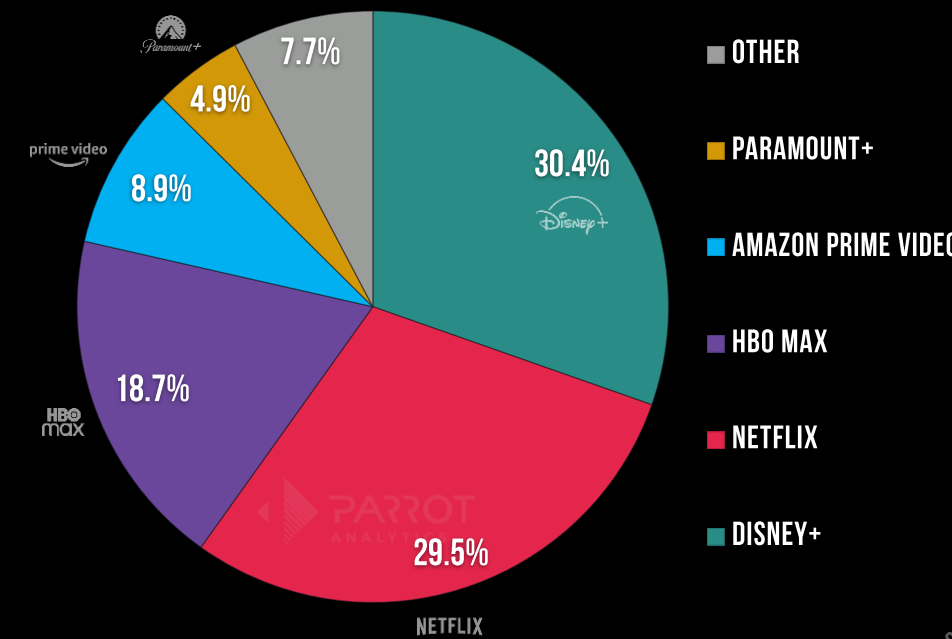
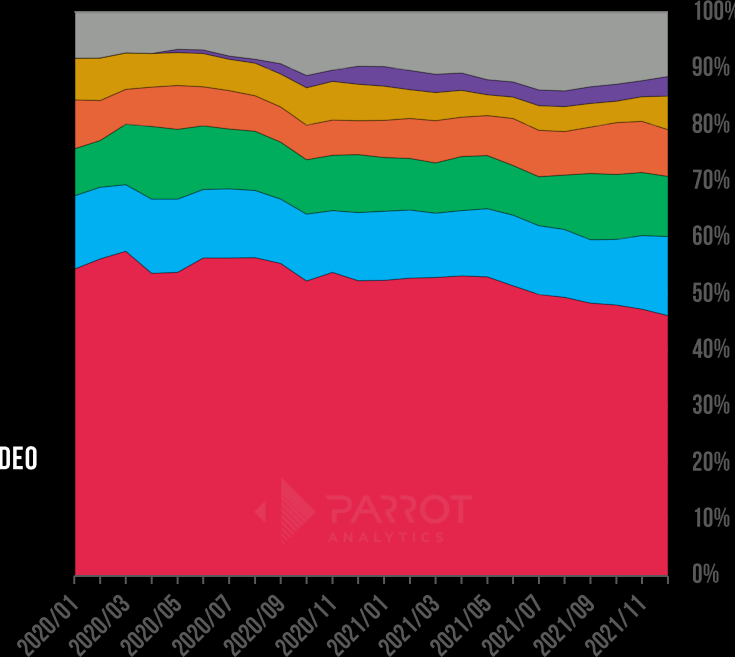
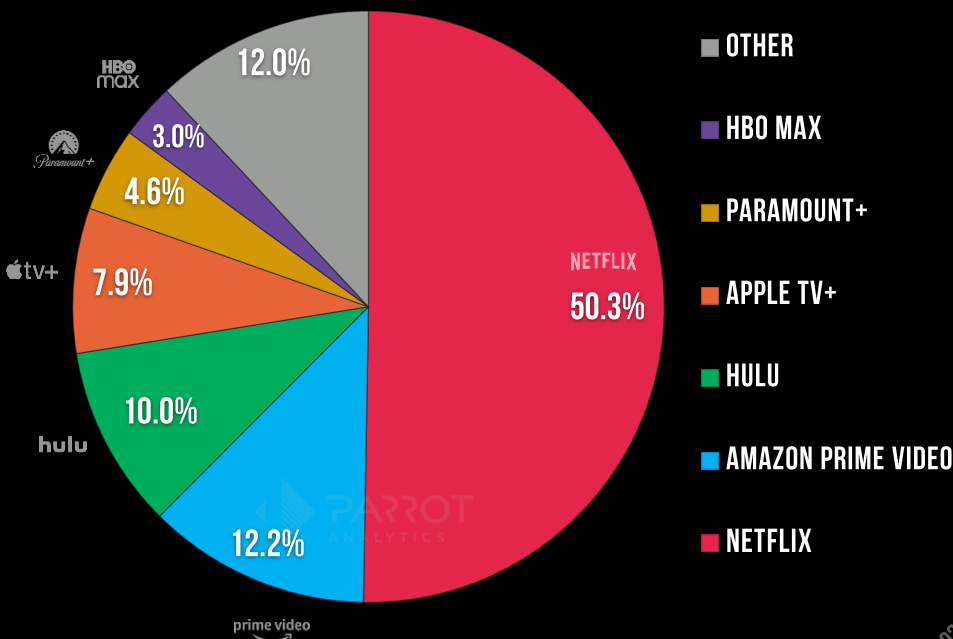
UNITED STATES

Demand share for drama 2021

Demand share trend for drama 24 MONTHS

Demand share for action/adventure 2021

Demand share trend for action/adventure 24 MONTHS



- Originals from Netflix accounted for a slim majority of demand for digital original dramas in the US (50.3%) in 2021. This is down from the platform's 55.4% share of drama demand in 2020.
- Apple TV+ was one of the platforms that saw the largest growth in its digital original share of demand for dramas this year. In 2021 it accounted for 7.9% of demand for all digital original dramas, up from 6.8% in 2020.
- Across the ten markets in this report, HBO Max had the lowest share of demand for original dramas in both the US and Germany. In each market, HBO Max originals made up 3.0% of demand for digital original dramas.

- After a year of chart-topping superhero series, Disney+ accounted for the largest share of US demand for digital originals in the action/adventure genre. With a 30.4% share of demand here, Disney+ edged out Netflix by less than 1%.
- Netflix reclaimed the top spot in the final two months of the year, surging to a 38.8% share of demand for original series in the action/adventure genre by December 2021.
- HBO Max came closest to overtaking the two leaders in this genre in October 2021 when its originals accounted for 24.5% of US demand for all action/adventure originals.



# Top Digital Original Series in the United States

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

SERIES NAME	IN-MARKET PLATFORM *	ORIGINAL PLATFORM	GENRE	DIFFERENCE FROM AVERAGE TITLE (1X) IN 2021
1 <i>Stranger Things</i>	Netflix	Netflix	Drama	39.7
2 <i>The Mandalorian</i>	Disney+	Disney+	Action and Adventure	37.7
3 <i>Cobra Kai</i>	Netflix	Netflix	Comedy	32.6
4 <i>WandaVision</i>	Disney+	Disney+	Action and Adventure	32.1
5 <i>Titans</i>	HBO Max	HBO Max	Action and Adventure	31.1
6 <i>Arcane</i>	Netflix	Netflix	Action and Adventure	29.6
7 <i>Ted Lasso</i>	Apple TV+	Apple TV+	Comedy	27.5
8 <i>Star Wars: The Clone Wars</i>	Disney+	Disney+	Children	26.9
9 <i>Lucifer</i>	Netflix	Netflix	Drama	26.1
10 <i>The Witcher</i>	Netflix	Netflix	Action and Adventure	24.9
11 <i>The Handmaid's Tale</i>	Hulu	Hulu	Drama	22.1
12 <i>The Expanse</i>	Amazon Prime Video	Amazon Prime Video	Drama	22.1
13 <i>The Falcon And The Winter Soldier</i>	Disney+	Disney+	Action and Adventure	20.9
14 <i>The Boys</i>	Amazon Prime Video	Amazon Prime Video	Action and Adventure	20.4
15 <i>Loki</i>	Disney+	Disney+	Action and Adventure	19.7
16 <i>Star Trek: Discovery</i>	Paramount+	Paramount+	Drama	19.3
17 <i>Cowboy Bebop</i>	Netflix	Netflix	Action and Adventure	19.3
18 <i>Mayor Of Kingstown</i>	Paramount+	Paramount+	Drama	19.2
19 <i>You</i>	Netflix	Netflix	Drama	18.3
20 <i>Only Murders In The Building</i>	Hulu	Hulu	Drama	18.1

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

37 <i>Castlevania</i>	Netflix	Netflix	Animation	13.2
44 <i>The Wheel Of Time</i>	Amazon Prime Video	Amazon Prime Video	Drama	12.5
62 <i>The Lost Symbol</i>	Peacock	Peacock	Drama	10.8
80 <i>Schmigadoon!</i>	Apple TV+	Apple TV+	Comedy	9.0
90 <i>Solar Opposites</i>	Hulu	Hulu	Animation	8.6

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

-- No platform information available, please refer to appendix



# GLOBAL TV DEMAND AWARDS™

## Creator of ‘YOU’ on how to make “bingeable” content



**Sera Gamble**

Co-Creator & Executive Producer



**Rebekah Zabarsky**

Host & Executive Producer



*YOU* co-creator and showrunner, Sera Gamble, on how to make “bingeable” content in today’s world where everyone is competing for viewer time.

Adapted from the book series by Caroline Kepnes and originally created for Lifetime, *YOU* was given a second life when Netflix picked up its second and future seasons.

Sera discusses the opportunity to deliver “a really intense experience of a story from beginning to end” and what makes TV revolutionary in 2022.

**WATCH NOW**



UNITED STATES



AUSTRALIA



BRAZIL



CANADA



FRANCE



GERMANY



ITALY



MEXICO



SPAIN



UNITED KINGDOM

# AUSTRALIA

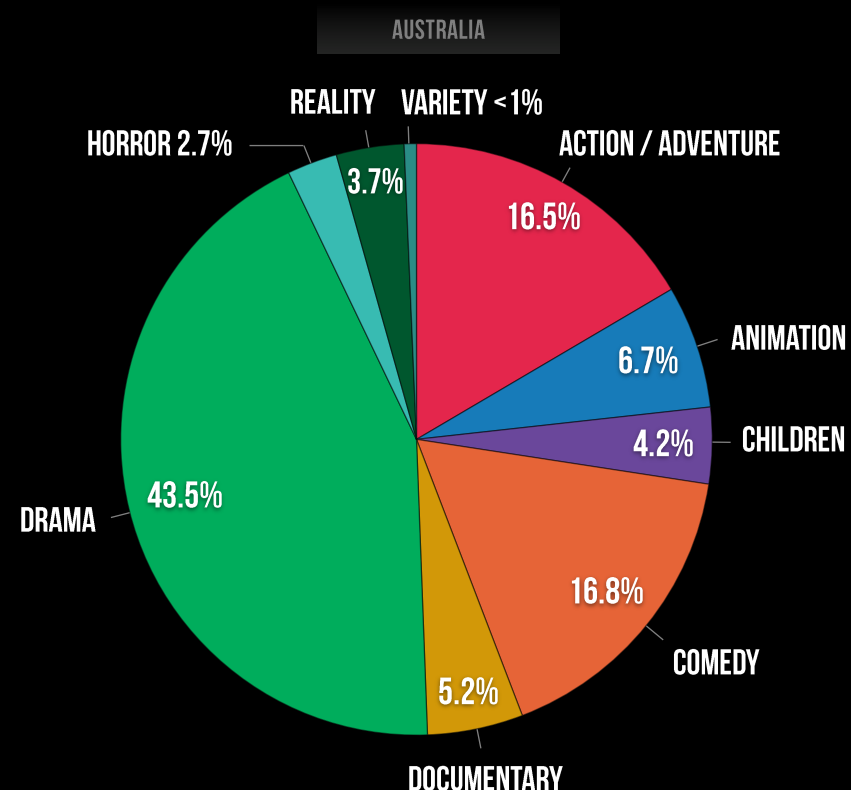
Learn which genres and subgenres of digital originals are most demanded by Australian audiences. Discover the demand share of the leading SVOD platforms over the past 24 months and explore demand for the top streaming originals.



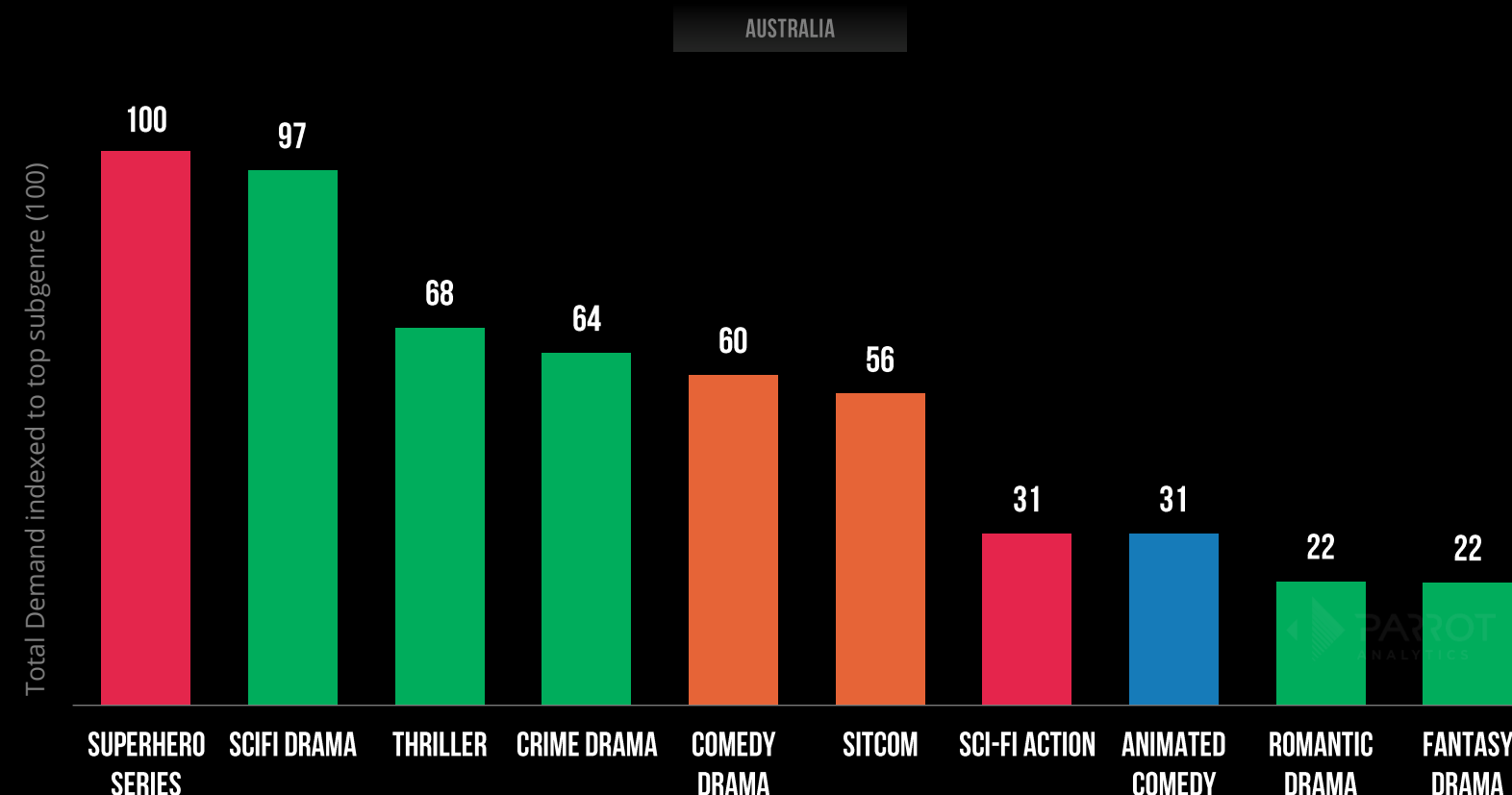
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# Australia Digital Original Genre and Subgenre Preferences

Digital original series **genre** demand share in 2021



The 10 most in-demand **subgenres** for digital originals in 2021



- With a 16.8% share of digital original demand for comedies, Australia was one of the top three most comedy loving markets in this report.
- Audience demand for digital originals in Australia closely mirrors the average demand breakdown across genres for countries in this report.
- Animation was one of the fastest growing digital original genres in Australia this year, increasing to a 6.7% share of demand from 4.7% in 2020.

- As in five other markets in this report, superhero series was the most in-demand digital original subgenre in Australia in 2021.
- Thriller was the third most in-demand subgenre in Australia in 2021. This is the highest rank for the subgenre in this report, which it also achieved in Spain.
- Romantic dramas also succeeded in Australia this year. It was the 9<sup>th</sup> most in-demand subgenre for the year in Australia and only ranked in the top ten subgenres in two other markets in this report.



# Australia Platform Demand Share and Digital Originals Demand Distribution

Market demand share by original platform for all digital originals

Demand distribution of a selection of top digital originals

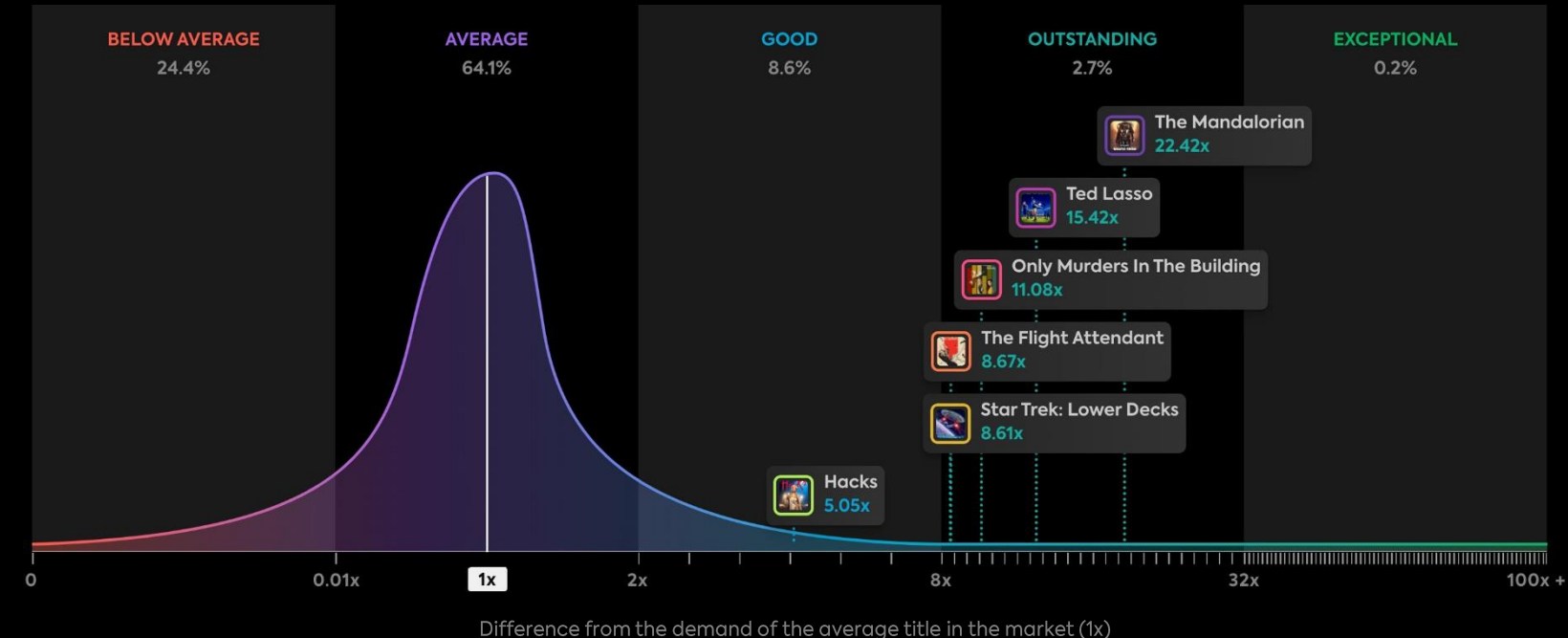
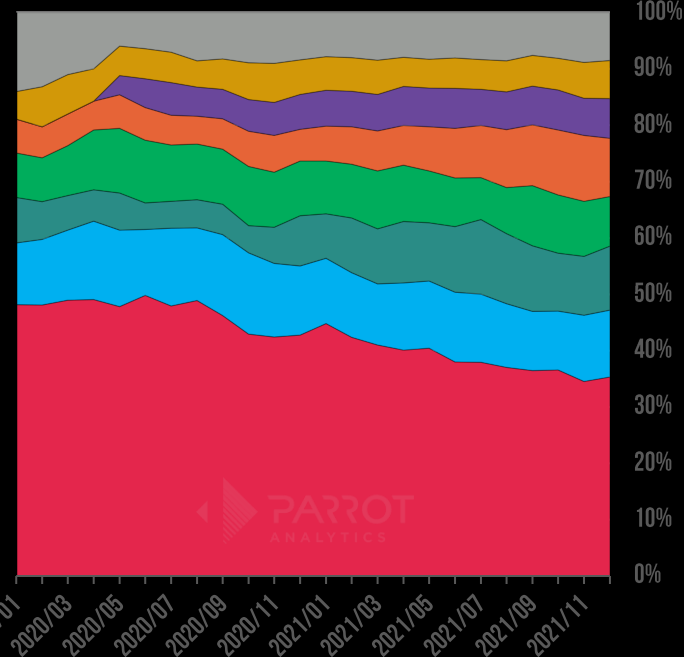
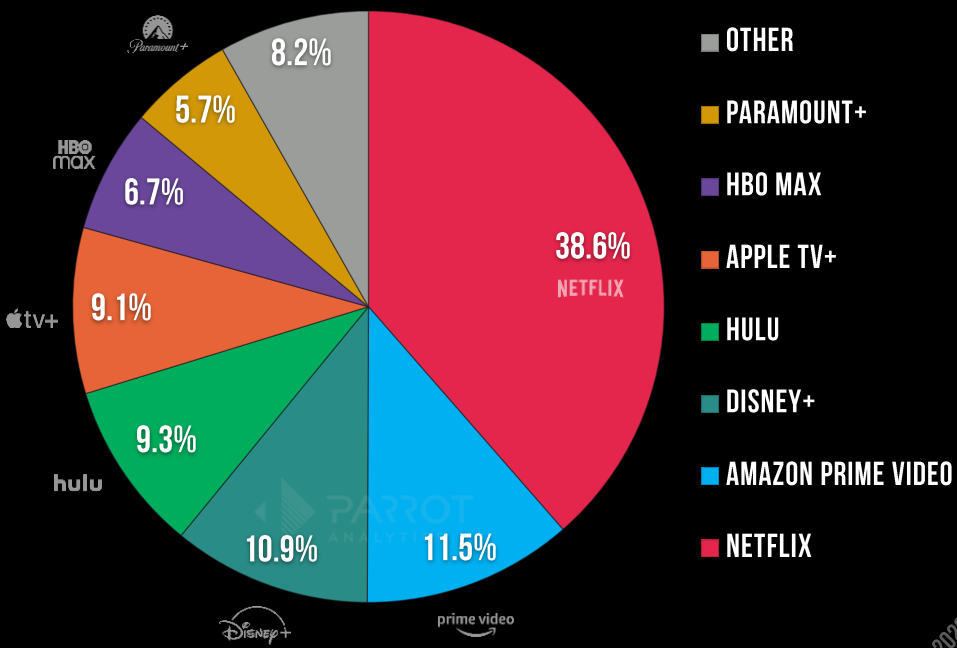
AUSTRALIA

AUSTRALIA

Demand share 2021

Demand share trend 24 MONTHS

Show position in demand distribution 2021



- Of all markets in this report, Australian audiences expressed the highest share of demand for digital original series from Amazon Prime Video and Apple TV+, with 11.5% and 9.1% respectively.
- However, these platforms have been moving in opposite directions. Amazon Prime Video's share of demand is down from 13.1% in 2020 while Apple TV+ is up from 5.8%.
- Netflix had the lowest demand share for the year in Australia of markets in this report. 38.6% of demand for digital originals in Australia was for a Netflix original, well below the platform's 47.1% share of demand globally. The platform's share of demand has declined consistently throughout the year from a high of 44.8% in January 2021.

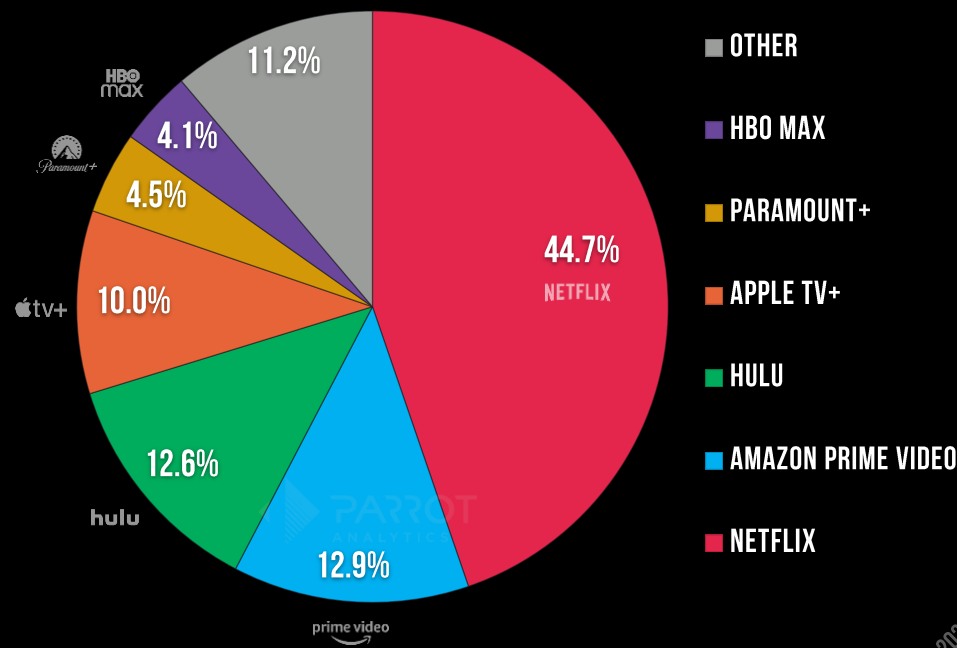
- In 2021, the most in-demand digital original series in Australia is **The Mandalorian**, with 22.42 times the demand of the average show.
- Australians' love of comedy can be seen in some of the most in-demand shows of the year. Comedies like **Star Trek: Lower Decks** and **Hacks** ranked higher in Australia than in any other market in this report.
- **Ted Lasso**, the globally popular comedy from Apple TV+, had 15.42 times the average series demand in Australia this year. It ranked as the third most in-demand original series in Australia, the show's joint highest rank in this report which it also achieved in Canada.

# Australia Platform Demand Share for Drama and Action/Adventure Digital Originals

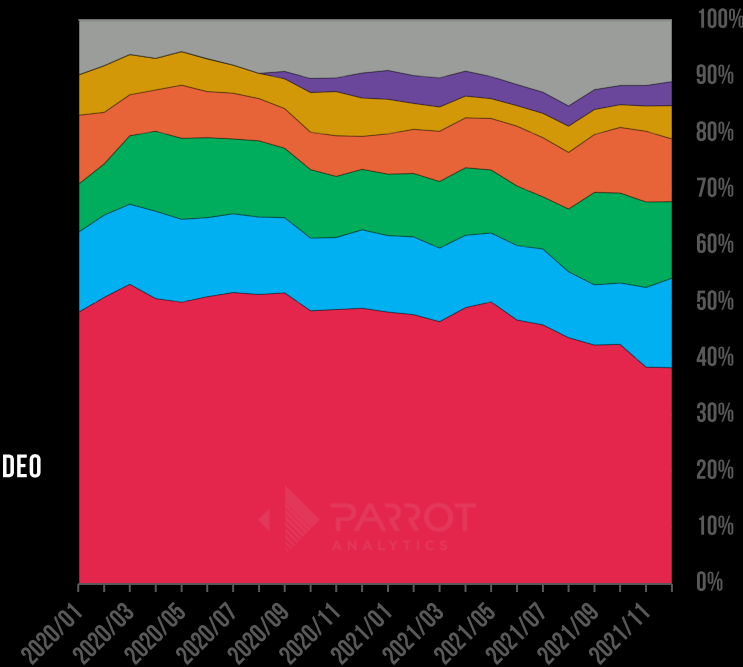
### Market demand share by original platform for drama digital originals

AUSTRALIA

#### Demand share for drama 2021



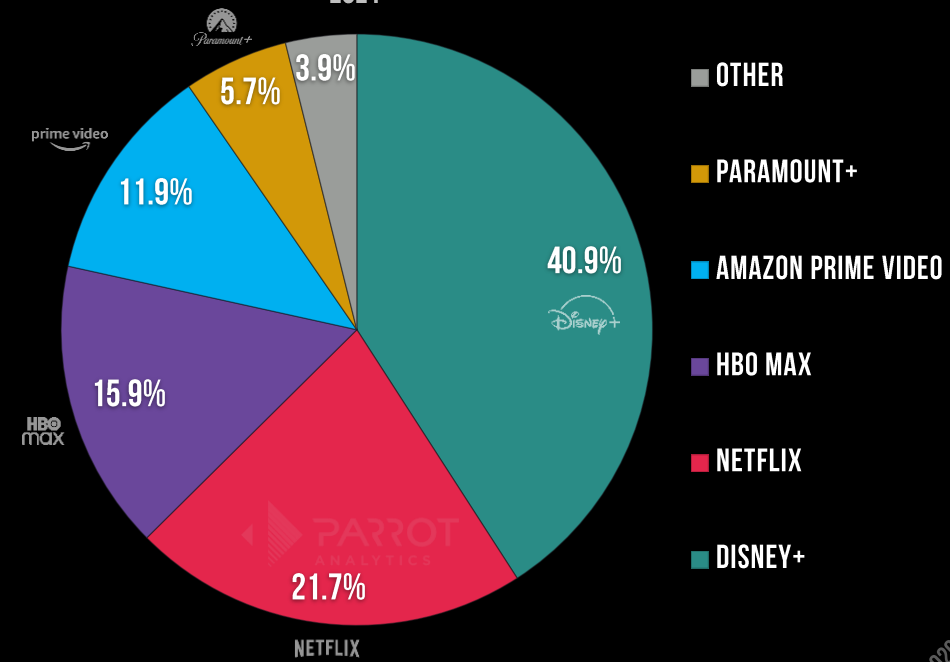
#### Demand share trend for drama 24 MONTHS



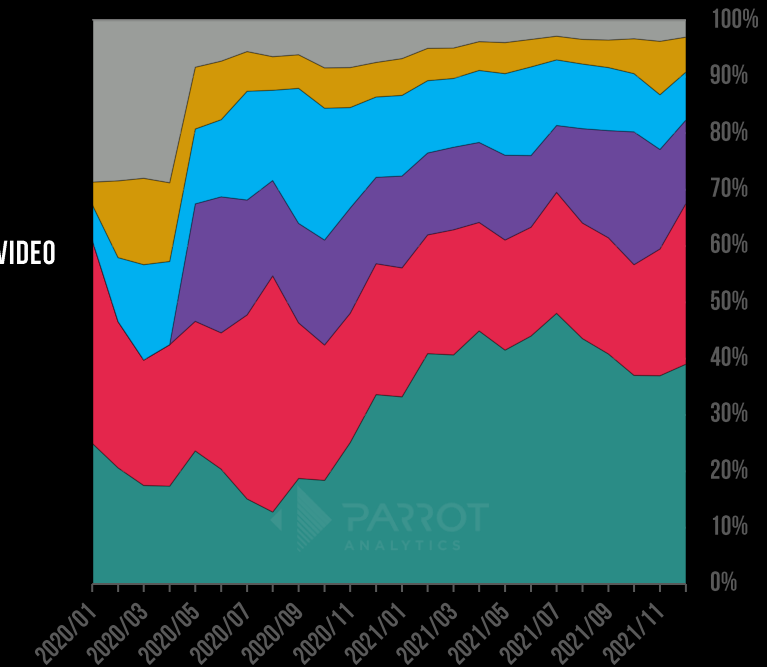
### Market demand share by original platform for action/adventure digital originals

AUSTRALIA

#### Demand share for action/adventure 2021



#### Demand share trend for action/adventure 24 MONTHS



- Netflix has by far the smallest share of demand for drama originals in Australia of markets in this report (44.7%). Its share has trended down through the year and hit an all time low of 38.4% in December 2021.
- With a 12.9% share, Amazon Prime Video originals made up a larger share of demand for dramas in Australia than in any other market in this report. The platform achieved a larger share of demand in December 2021 (15.9%) than at any point in the past two years.
- Hulu also saw a surge in demand for its dramas at the back half of the year. In September, Hulu's dramas accounted for 16.4% of demand for digital original dramas, the platform's largest share in two years.

- Similar to the drama genre, there was weak demand for Netflix's action/adventure originals in Australia. The platform's 21.7% share of demand in this genre was the second smallest of markets in this report.
- As with all markets covered in this report, Disney+ originals made up the largest share of demand for action/adventure originals in Australia. Australia was one of four markets in this report where the demand share for Disney+ originals exceeded 40%.
- Accounting for a 5.7% share of demand for action/adventure originals, Paramount+ achieved its second largest demand share in Australia of markets in this report.



# Top Digital Original Series in Australia

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

SERIES NAME	IN-MARKET PLATFORM *	ORIGINAL PLATFORM	GENRE	DIFFERENCE FROM AVERAGE TITLE (1X) IN 2021
1 <i>The Mandalorian</i>	Disney+	Disney+	Action and Adventure	22.4
2 <i>WandaVision</i>	Disney+	Disney+	Action and Adventure	19.7
3 <i>Ted Lasso</i>	Apple TV+	Apple TV+	Comedy	15.4
4 <i>The Boys</i>	Amazon Prime Video	Amazon Prime Video	Action and Adventure	14.1
5 <i>The Handmaid's Tale</i>	Stan	Hulu	Drama	13.8
6 <i>The Expanse</i>	Amazon Prime Video	Amazon Prime Video	Drama	13.8
7 <i>Stranger Things</i>	Netflix	Netflix	Drama	13.6
8 <i>The Falcon And The Winter Soldier</i>	Disney+	Disney+	Action and Adventure	12.6
9 <i>Lucifer</i>	Netflix	Netflix	Drama	12.2
10 <i>Cobra Kai</i>	Netflix	Netflix	Comedy	12.0
11 <i>Loki</i>	Disney+	Disney+	Action and Adventure	11.4
12 <i>Only Murders In The Building</i>	Disney+	Hulu	Drama	11.1
13 <i>The Crown</i>	Netflix	Netflix	Drama	10.0
14 <i>The Witcher</i>	Netflix	Netflix	Action and Adventure	9.6
15 <i>Star Wars: The Clone Wars</i>	Disney+	Disney+	Children	9.5
16 <i>The Grand Tour</i>	Amazon Prime Video	Amazon Prime Video	Sports	8.8
17 <i>Invincible</i>	Amazon Prime Video	Amazon Prime Video	Animation	8.8
18 <i>Doom Patrol</i>	Binge, Foxtel Now	HBO Max	Action and Adventure	8.7
19 <i>The Flight Attendant</i>	Binge, Foxtel Now	HBO Max	Drama	8.7
20 <i>Star Trek: Lower Decks</i>	Amazon Prime Video	Paramount+	Animation	8.6

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

37 <i>Mythic Quest</i>	Apple TV+	Apple TV+	Comedy	6.1
43 <i>Nine Perfect Strangers</i>	Amazon Prime Video	Hulu	Drama	5.7
48 <i>Why Women Kill</i>	Paramount+	Paramount+	Comedy	5.4
55 <i>Hacks</i>	Stan	HBO Max	Comedy	5.1
90 <i>Made For Love</i>	Stan	HBO Max	Comedy	3.1

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

-- No platform information available, please refer to appendix



UNITED STATES



AUSTRALIA



BRAZIL



CANADA



FRANCE



GERMANY



ITALY



MEXICO



SPAIN



UNITED KINGDOM

# BRAZIL

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

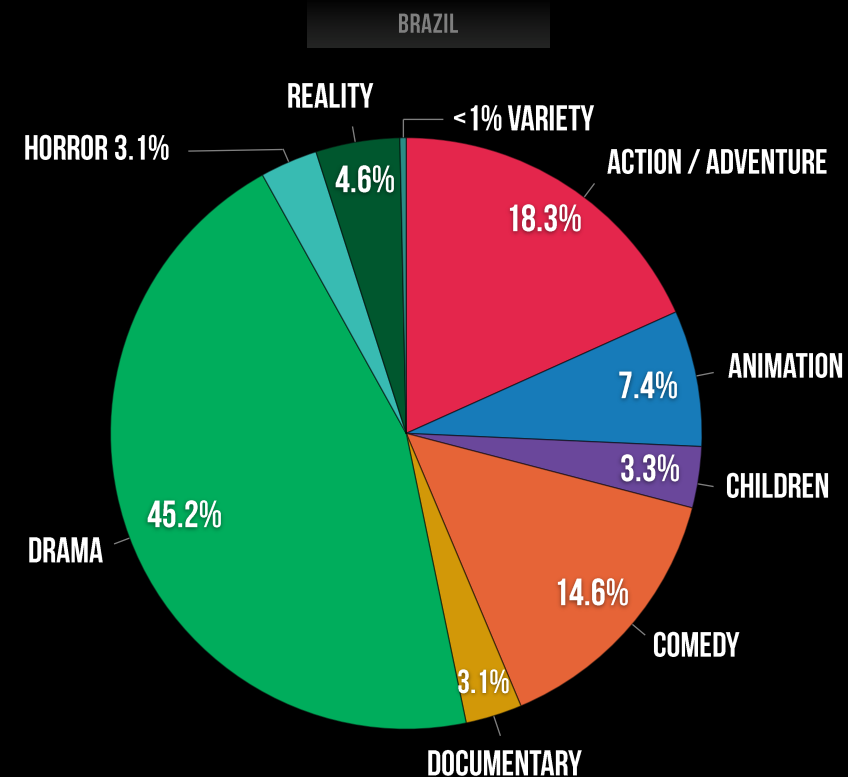


**NOTE:** The insights presented in this section are based on the entire available Parrot Analytics globalTV demand dataset, which is comprised of 3.5 trillion data points across 100+ languages in 100+ countries.

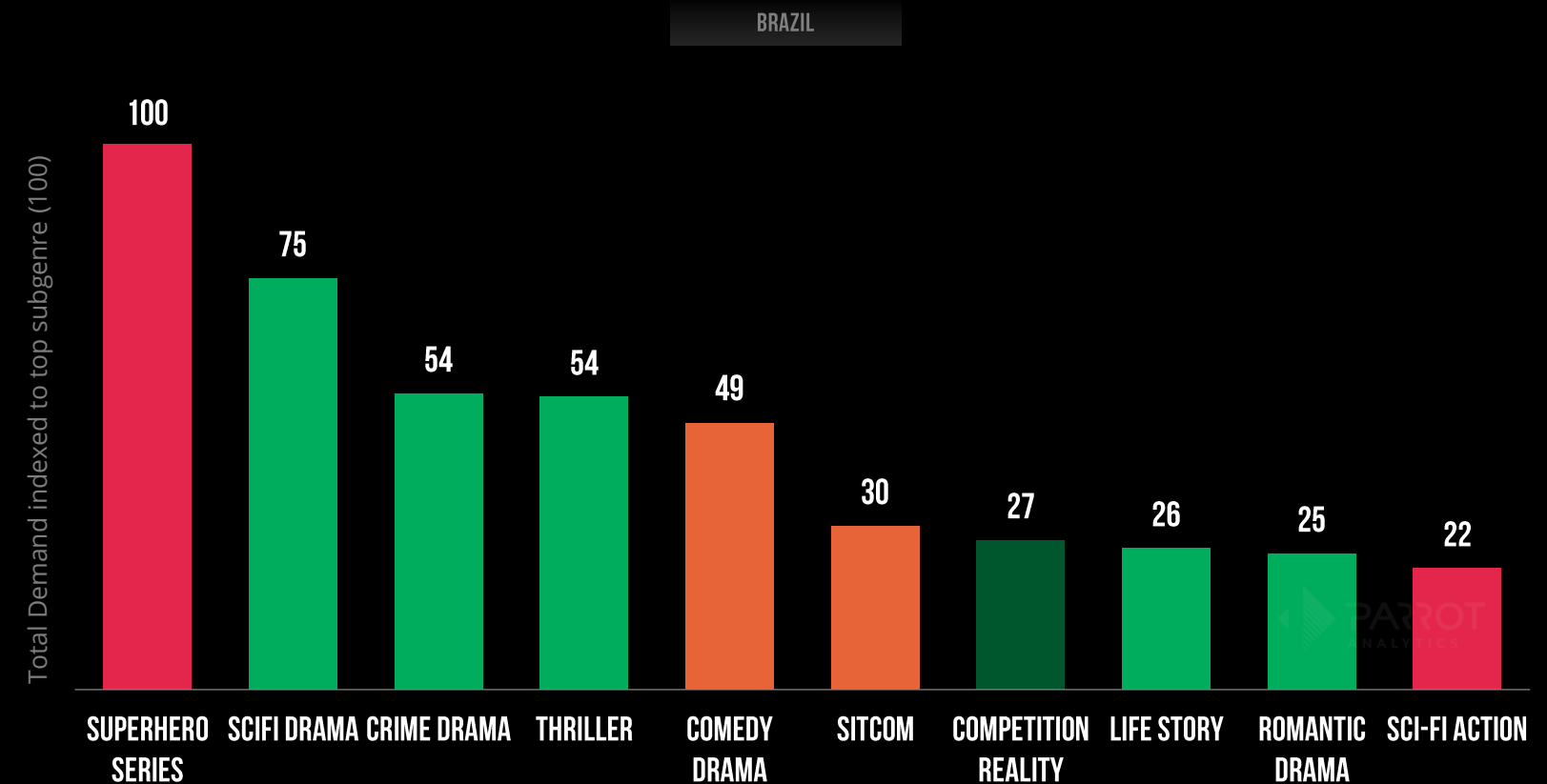


# Brazil Digital Original Genre and Subgenre Preferences

Digital original series **genre** demand share in 2021



The 10 most in-demand **subgenres** for digital originals in 2021



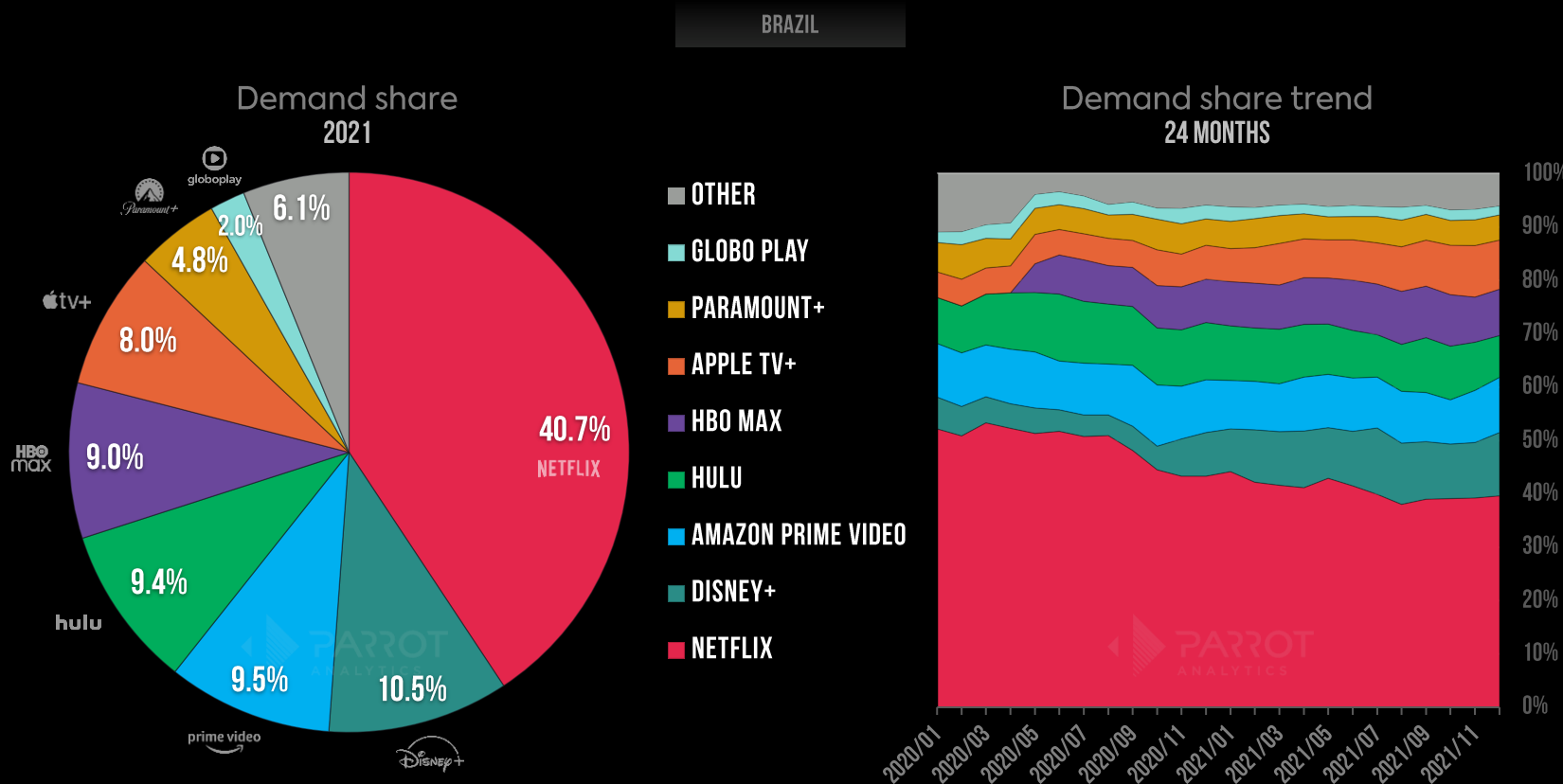
- Brazil is tied with Canada as the most horror-loving market in this report. Both markets gave a 3.1% share of demand to the horror genre in 2021.
- Brazil had the second largest share of demand for digital original action/adventure series in this report. The 18.3% share of demand for the genre was exactly the same share of demand audiences gave to the genre in Brazil last year.
- Brazil had the second largest share of demand for original reality series, behind only the reality-loving American market in this report. Brazilians' share of demand for the genre increased to 4.6% this year from 2.8% in 2020.

- Superhero series was the most in-demand digital original subgenre in Brazil for the year. It had a strong lead over the second ranked subgenre, sci-fi drama, which had 25% less demand than superhero series in 2021.
- Competition reality was uniquely successful subgenre in Brazil this year. It ranked as the 7<sup>th</sup> most in-demand subgenre for the year. Brazil was the only market in this report where a reality subgenre ranked in the ten most in-demand.
- The life story subgenre was the 8<sup>th</sup> most in-demand subgenre in Brazil in 2021. This is the highest rank for the subgenre in this report, which it also achieved in Mexico.

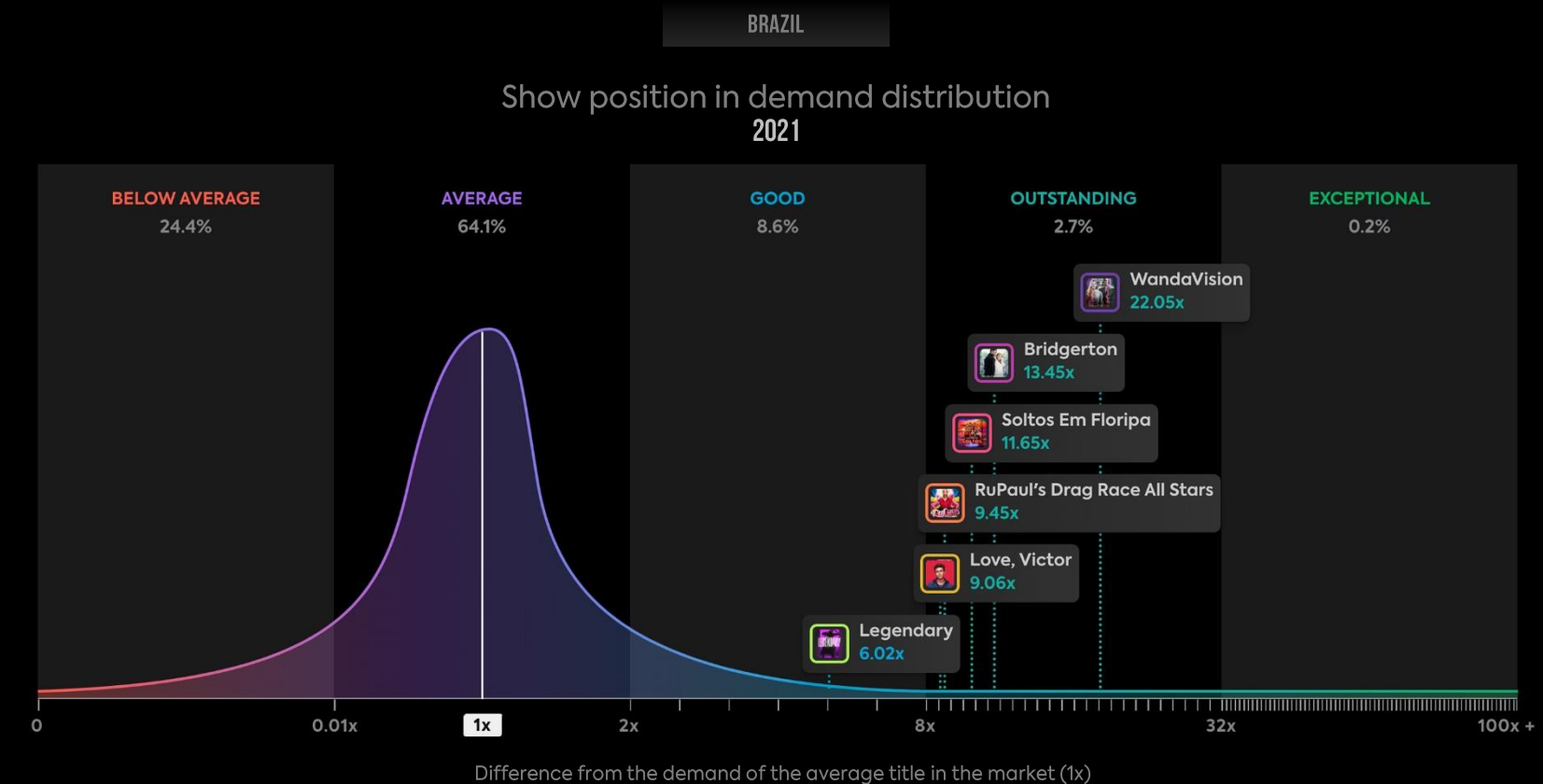


# Brazil Platform Demand Share and Digital Originals Demand Distribution

Market demand share by original platform for all digital originals



Demand distribution of a selection of top digital originals



- Brazilians gave a larger share of demand to originals from HBO Max than any other market in this report. The 9.0% of demand for HBO Max originals was well above the global share of demand for this platform's content – 5.0%.
- Hulu had the largest share of demand for its originals in Brazil of markets in this report but its share of demand has been significantly squeezed at the end of the year, shrinking to 7.8% in December 2021.
- It has been a tight race between Apple TV+, HBO Max, and Hulu for demand share in Brazil. At the start of the year Hulu had the largest share of demand; by mid-year HBO Max was in the lead; at the end of the year, Apple TV+ had the largest demand share of the three platforms.

- Brazil was one of two markets in this report (along with Mexico) where **WandaVision** was the most in-demand digital original of 2021. It had 22.05 times the average series demand in Brazil this year.
- High demand for reality series like **Soltos em Floripa**, **RuPaul's Drag Race All Stars**, and **Legendary** helped make Brazil one of the most reality-loving markets in this report. These three series ranked higher in Brazil than in any other market in this report (13<sup>th</sup>, 15<sup>th</sup> and 48<sup>th</sup> respectively).
- Bridgerton** found an especially strong base of fans in Brazil. With 13.45 times the average series demand, the show had higher demand in Brazil than in any other market globally this year.

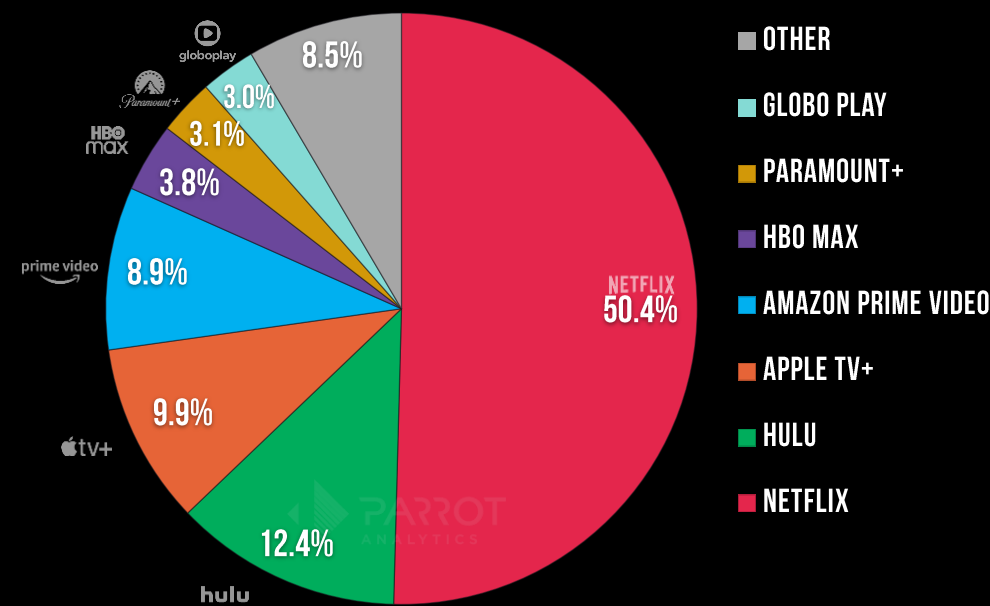


# Brazil Platform Demand Share for Drama and Action/Adventure Digital Originals

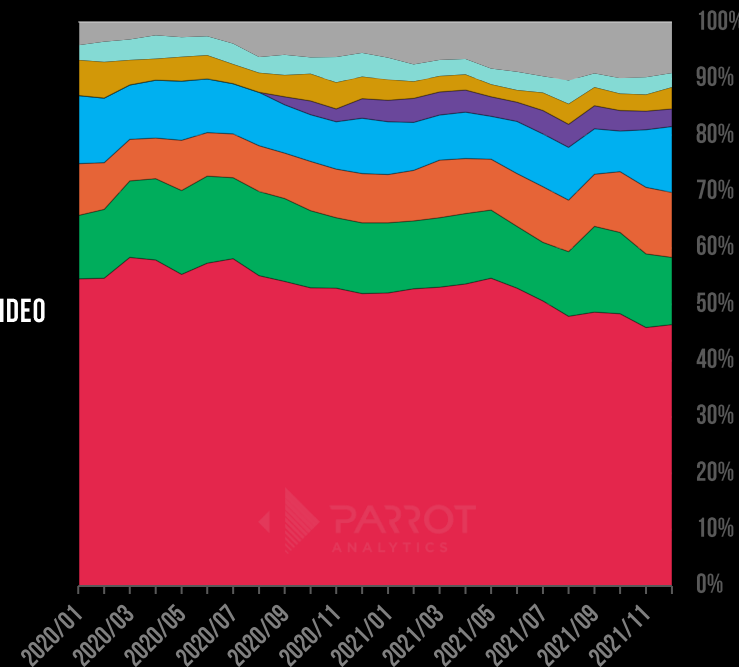
Market demand share by original platform for drama digital originals

BRAZIL

Demand share for drama 2021



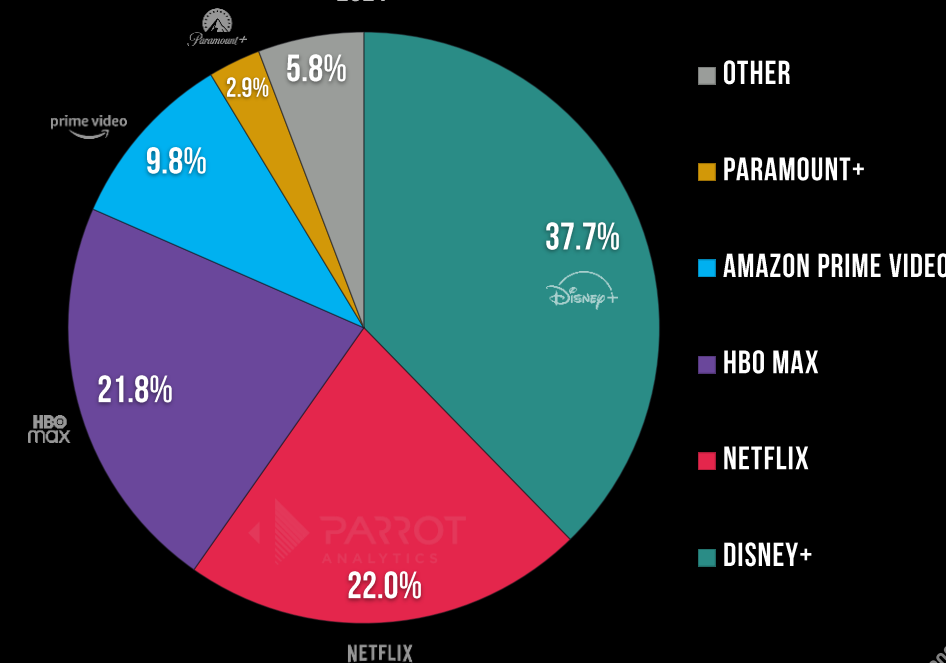
Demand share trend for drama 24 MONTHS



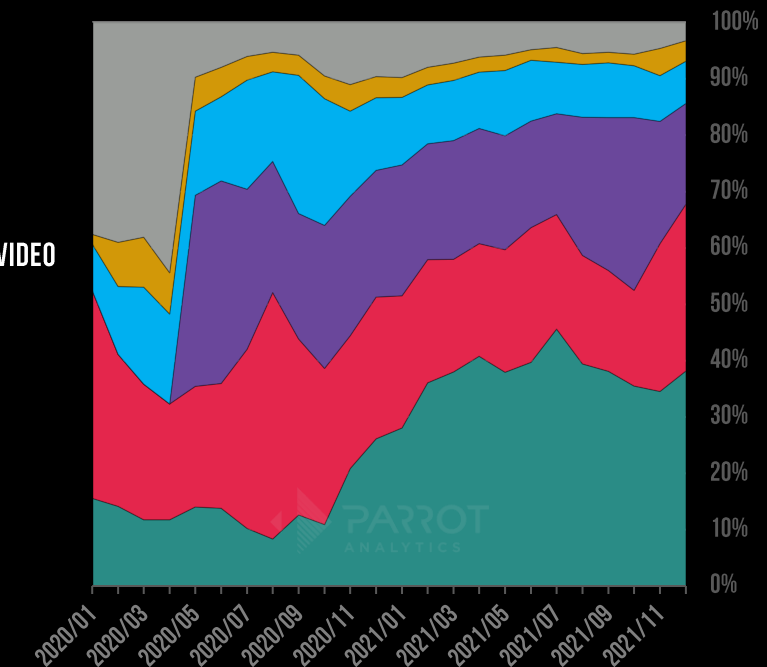
Market demand share by original platform for action/adventure digital originals

BRAZIL

Demand share for action/adventure 2021



Demand share trend for action/adventure 24 MONTHS



- In Brazil, original series from Hulu accounted for 12.4% of demand in the drama genre this year. Brazil was the only market in this report where Hulu’s originals had the second largest share of demand for original dramas behind Netflix.
- Amazon Prime Video’s dramas noticeably underperformed in Brazil this year. The 8.9% of demand for digital original dramas that was for an Amazon original was the platform’s smallest share across markets in this report and well below its global share of demand in the drama genre, 13.0%.
- Dramas from Apple TV+ accounted for 9.9% of demand for original dramas in Brazil. This was the only market where the share of demand for Apple TV+ surpassed Amazon Prime Video in this genre.

- Action/adventure originals from HBO Max found their greatest success in the Brazilian market where they accounted for 21.8% of demand for action/adventure originals this year, nearly overtaking Netflix, which had a 22% share in the genre.
- However, following the success of Disney+ in the action/adventure genre, HBO Max is in a considerably weaker position this year. At several points in 2020, HBO Max had the largest share of demand for action/adventure originals in Brazil. That has not happened this year, where it has been battling Netflix for second place.
- Amazon Prime Video has lost significant demand share for its action/adventure originals. In 2020 its originals made up 16.3% of demand in this genre. In 2021 its share has shrunk to 9.8%.



# Top Digital Original Series in Brazil

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

SERIES NAME	IN-MARKET PLATFORM *	ORIGINAL PLATFORM	GENRE	DIFFERENCE FROM AVERAGE TITLE (1X) IN 2021
1 <i>WandaVision</i>	Disney+	Disney+	Action and Adventure	22.1
2 <i>The Mandalorian</i>	Disney+	Disney+	Action and Adventure	17.4
3 <i>Arcane</i>	Netflix	Netflix	Action and Adventure	16.9
4 <i>Titans</i>	Netflix	HBO Max	Action and Adventure	16.3
5 <i>Stranger Things</i>	Netflix	Netflix	Drama	16.2
6 <i>Cobra Kai</i>	Netflix	Netflix	Comedy	16.0
7 <i>The Handmaid's Tale</i>	Paramount+	Hulu	Drama	15.3
8 <i>The Boys</i>	Amazon Prime Video	Amazon Prime Video	Action and Adventure	13.9
9 <i>Bridgerton</i>	Netflix	Netflix	Drama	13.4
10 <i>La Casa De Papel (Money Heist)</i>	Netflix	Netflix	Drama	13.1
11 <i>Lucifer</i>	Netflix	Netflix	Drama	12.6
12 <i>The Falcon And The Winter Soldier</i>	Disney+	Disney+	Action and Adventure	11.8
13 <i>Soltos Em Floripa</i>	Amazon Prime Video	Amazon Prime Video	Reality	11.7
14 <i>Loki</i>	Disney+	Disney+	Action and Adventure	11.5
15 <i>RuPaul's Drag Race All Stars</i>	Netflix	Paramount+	Reality	9.5
16 <i>The Witcher</i>	Netflix	Netflix	Action and Adventure	9.3
17 <i>Doom Patrol</i>	HBO Max	HBO Max	Action and Adventure	9.1
18 <i>Only Murders In The Building</i>	Star+	Hulu	Drama	9.1
19 <i>Dark</i>	Netflix	Netflix	Drama	9.1
20 <i>Love, Victor</i>	Star+	Hulu	Comedy	9.1

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

37 <i>Dickinson</i>	Apple TV+	Apple TV+	Comedy	6.8
48 <i>Legendary</i>	HBO Max	HBO Max	Reality	6.0
97 <i>As Five</i>	Globo Play	Globo Play	Drama	3.0
130 <i>Bom Dia, Verônica</i>	Netflix	Netflix	Drama	2.2
135 <i>Desalma</i>	Globo Play	Globo Play	Horror	2.1

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

-- No platform information available, please refer to appendix

# GLOBAL TV DEMAND AWARDS™

## Authenticity and Artistry on The Voice



**Carson Daly**

Host & Producer



**Rebekah Zabarsky**

Host & Executive Producer



*The Voice* host and producer Carson Daly, alongside executive producer Audrey Morrissey, highlight what they believe makes NBC's competition show a consistent fan-favorite year after year as the series celebrates its 21st season.

One example: a unique approach to coaching. With a focus on mentorship over judging, four celebrity coaches bring experience, warmth, and fun in what they describe as "the best job they've ever had."

**WATCH NOW**



 UNITED STATES

 AUSTRALIA

 BRAZIL

 CANADA

 FRANCE

 GERMANY

 ITALY

 MEXICO

 SPAIN

 UNITED KINGDOM

# CANADA

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

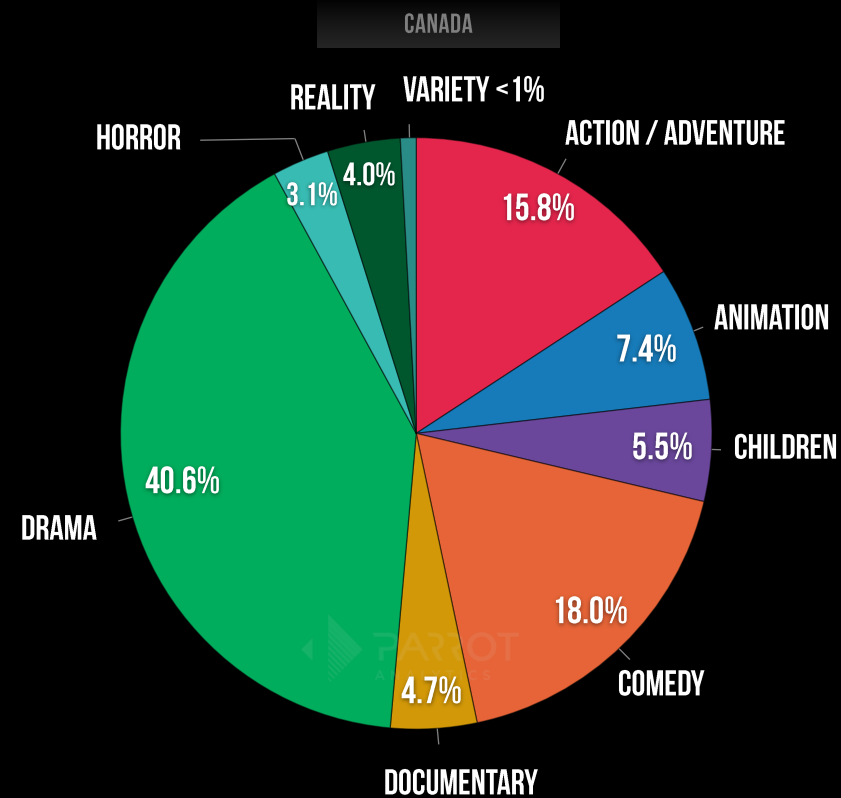


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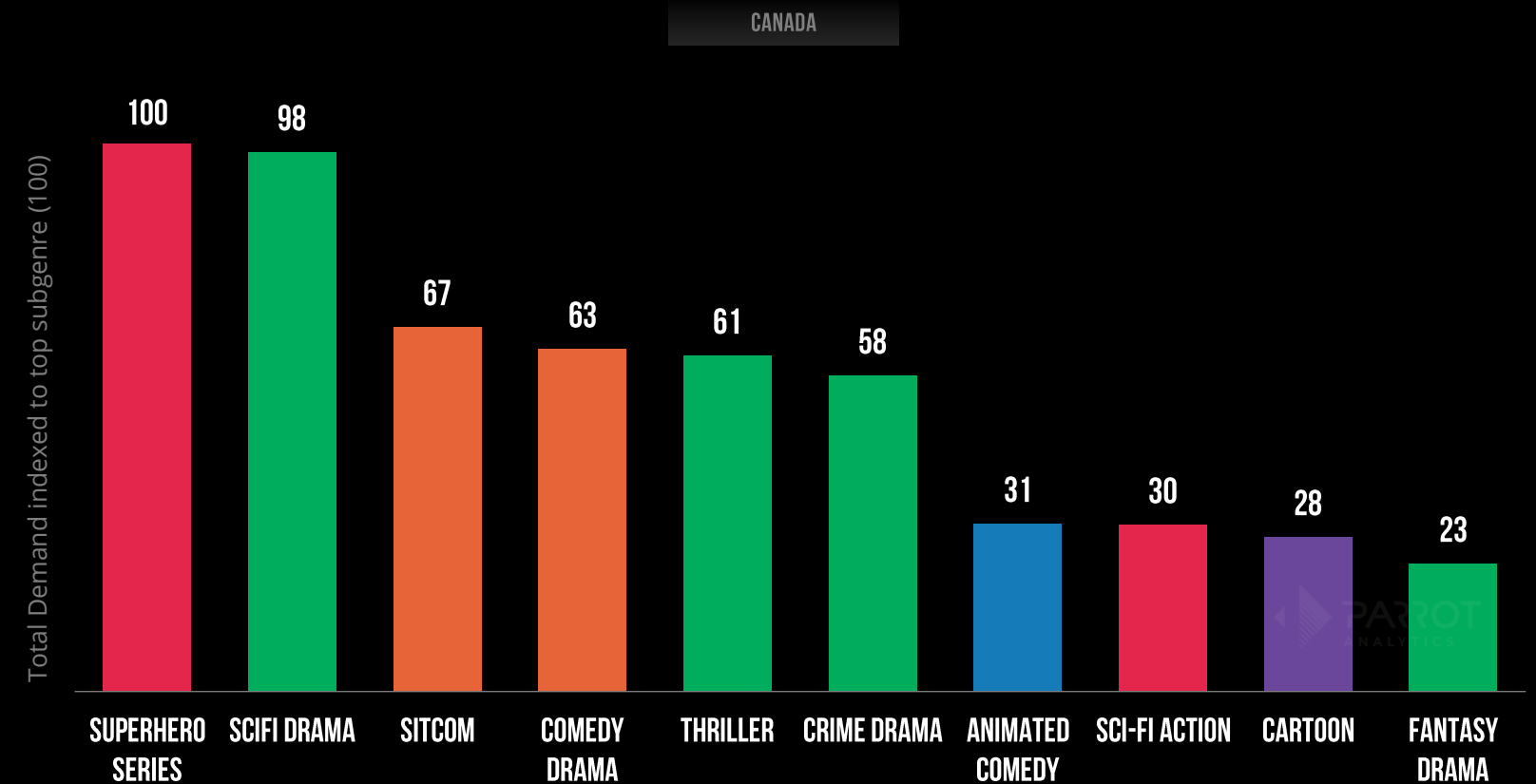


# Canada Digital Original Genre and Subgenre Preferences

Digital original series **genre** demand share in 2021



The 10 most in-demand **subgenres** for digital originals in 2021



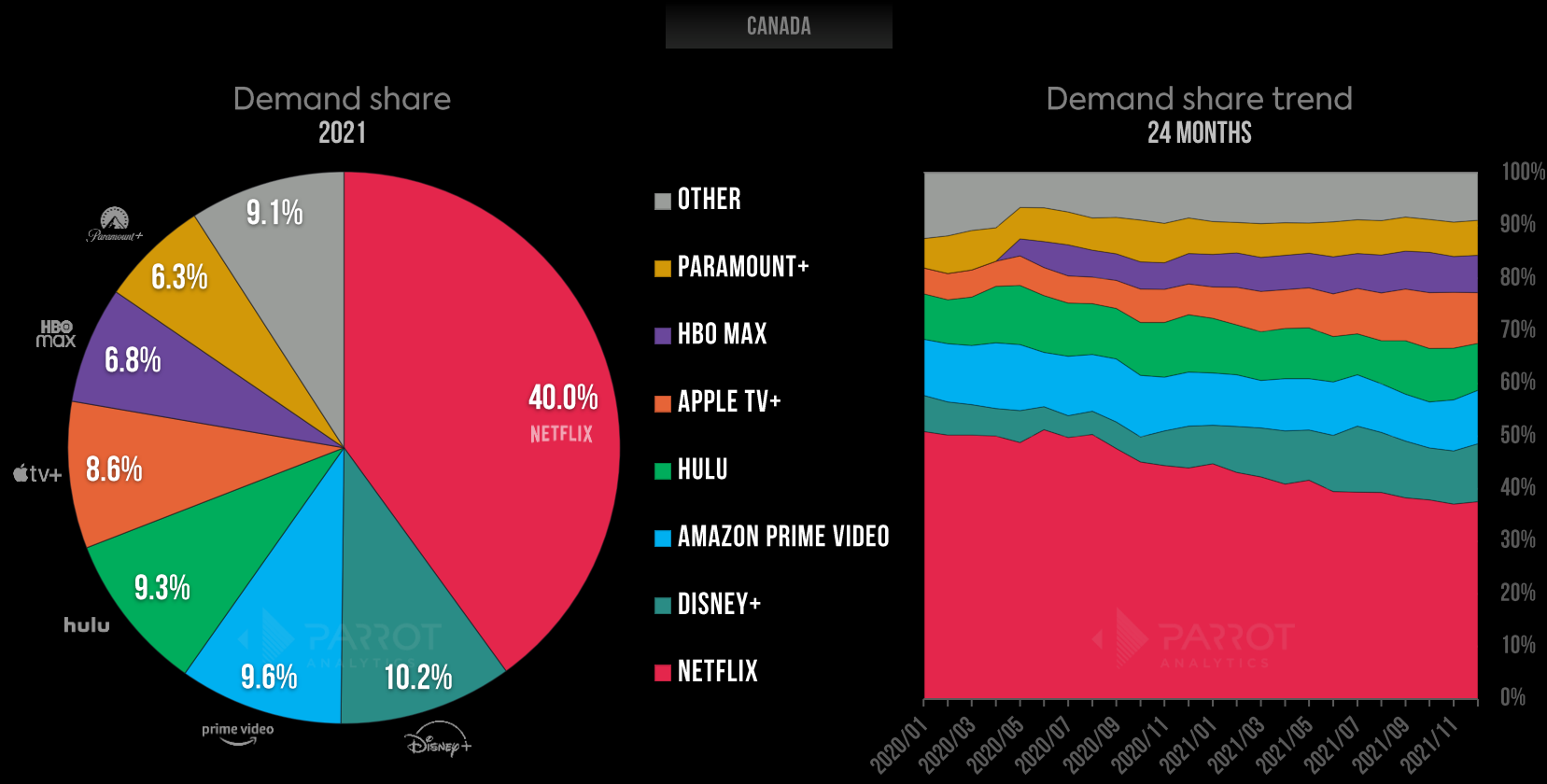
- Both Canada and Brazil had a 3.1% share of demand for digital original horror content in 2021, the largest share of demand for the genre in this report. However, while Brazil’s share shrank from last year, Canada’s grew from a 2.8% share in 2020.
- Canada is the most comedy-loving market in this report. 18% of demand for digital originals was for a comedy. This is an increase from the genre’s 17.4% share of demand last year and the first year that Canada has a greater share of demand for comedy than America.
- While the documentary genre has seen its share of demand grow in most markets in this report, in Canada it has fallen from 5.3% in 2020 to 4.7% in 2021.

- The popularity of sitcoms in particular helped make Canada the most comedy-loving market in this report. Sitcom was the third most in-demand subgenre in Canada this year – its highest rank in this report.
- As the 7<sup>th</sup> most in-demand subgenre this year, animated comedy also ranks higher in Canada than in any other market in this report. This shows that Canadians’ love of comedy spans both animation and live action.
- While lighter comedy subgenres have succeeded in Canada, the opposite is true for more serious crime dramas. As the 6<sup>th</sup> most in-demand subgenre for the year, crime drama ranked lower in Canada than in any other market in this report.

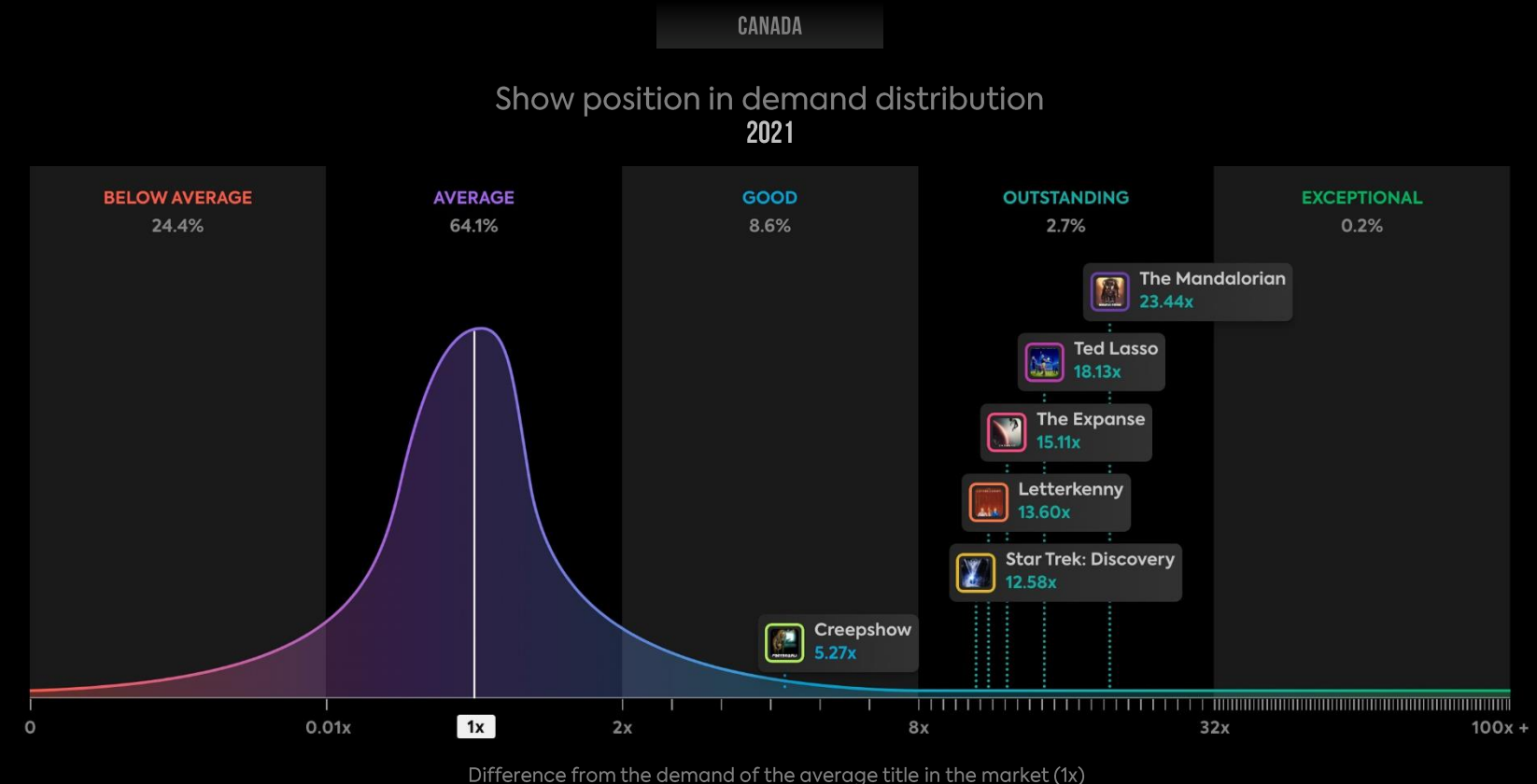


# Canada Platform Demand Share and Digital Originals Demand Distribution

Market demand share by original platform for all digital originals



Demand distribution of a selection of top digital originals



- Netflix captured 40.0% of Canadian demand for digital originals in 2021. This is Netflix’s second smallest share of demand in this report.
- With a 6.3%, Paramount+ achieved its highest demand share for digital originals in Canada of all markets in this report. This is up slightly from its 6.0% demand share in 2020 when the platform was still branded CBS All Access.
- HBO Max more than doubled its demand share in Canada in 2021 compared to 2020. Its 6.8% share of demand for original series was up from 3.3% in 2020.

- The most in-demand digital original series in Canada in 2021 is **The Mandalorian**. For the year it had 23.44 times the demand of the average series. It was also the top series last year in Canada, but its demand has fallen slightly this year from 27.6x in 2020.
- The Hulu original **Letterkenny** achieved its highest rank in Canada of all markets in this report with 13.6 times the demand of the average show. The local setting and themes of the show have resonated with Canadians.
- Sci-fi series across multiple franchises rank higher in Canada than other markets in this report (**The Mandalorian, Star Trek: Discovery, and The Expanse**) and seem to point to a pattern of high demand for space-themed content in this market.



# Canada Platform Demand Share for Drama & Action/Adventure Digital Originals

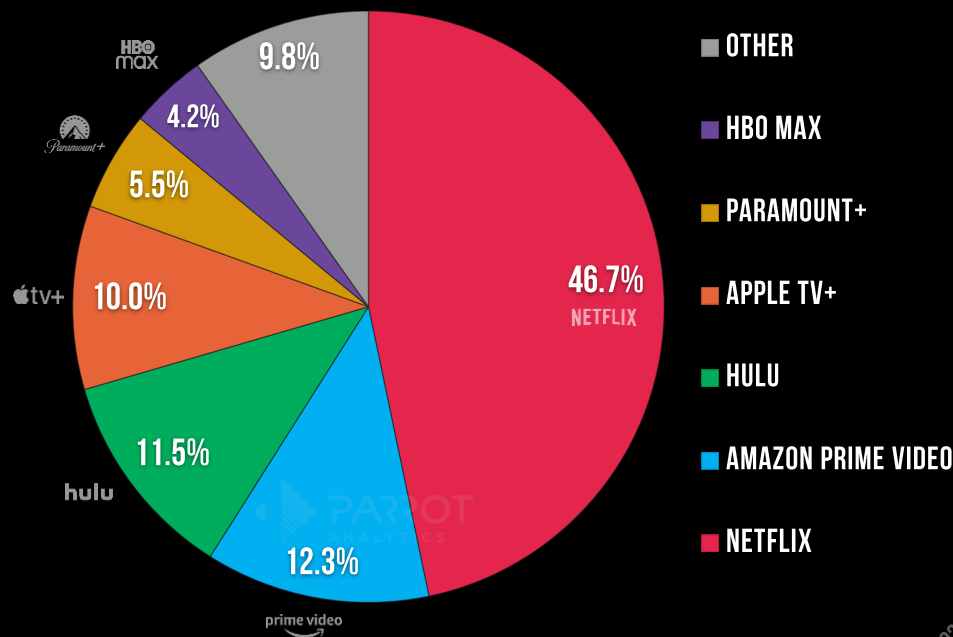
Market demand share by original platform for drama digital originals

Market demand share by original platform for action/adventure digital originals

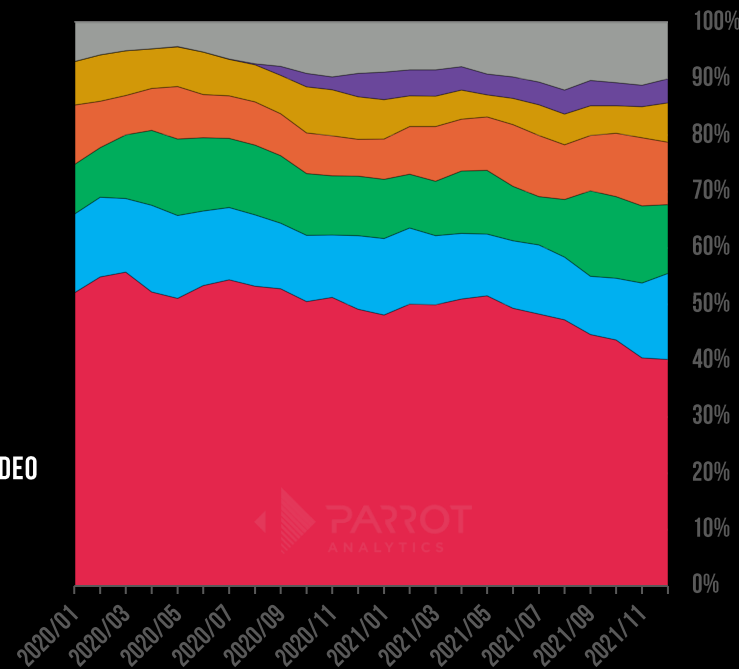
CANADA

CANADA

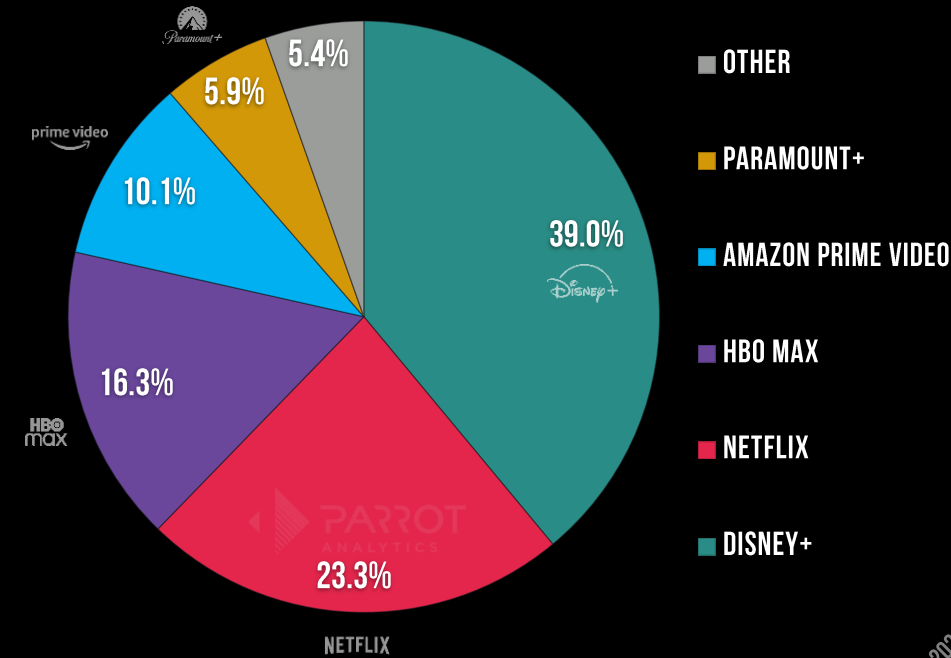
Demand share for drama 2021



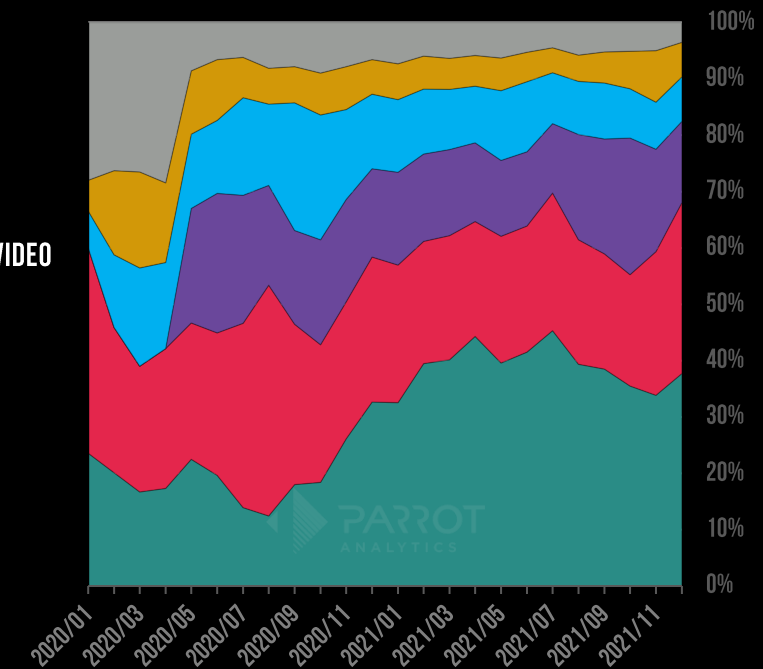
Demand share trend for drama 24 MONTHS



Demand share for action/adventure 2021



Demand share trend for action/adventure 24 MONTHS



- Canada had the largest share of demand for Paramount+ original dramas in this report, which accounted for a 5.5% share of demand for all original dramas in 2021.
- Canada was the market in this report where Netflix had the second smallest share of demand for digital original dramas (46.7%).
- HBO Max original dramas found fans in Canada. Original series from HBO Max made up 4.2% of demand for all digital original dramas in 2021, a larger share for the platform than in any other market in this report.

- In this report, Paramount+ reached its largest share of demand for originals in the action/adventure genre in Canada where it had a 5.9% share of demand in 2021. This is nearly twice the platform's global share of demand in the genre (3.0%).
- Disney+ more than doubled its share of demand for action/adventure originals in Canada this year. In 2020 its originals accounted for 19.3% of demand in the genre but that has increased to 39% this year.
- HBO Max was able to grow its demand share this year despite aggressive growth from Disney+. In 2020 its originals made up 12.9% of demand in the action/adventure genre. This year it has increased to 16.3%.





# Top Digital Original Series in Canada

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

SERIES NAME	IN-MARKET PLATFORM *	ORIGINAL PLATFORM	GENRE	DIFFERENCE FROM AVERAGE TITLE (1X) IN 2021
1 <i>The Mandalorian</i>	Disney+	Disney+	Action and Adventure	23.4
2 <i>WandaVision</i>	Disney+	Disney+	Action and Adventure	21.3
3 <i>Ted Lasso</i>	Apple TV+	Apple TV+	Comedy	18.1
4 <i>Stranger Things</i>	Netflix	Netflix	Drama	17.3
5 <i>The Expanse</i>	Amazon Prime Video	Amazon Prime Video	Drama	15.1
6 <i>The Handmaid's Tale</i>	Crave	Hulu	Drama	14.9
7 <i>Letterkenny</i>	Crave	Hulu	Comedy	13.6
8 <i>The Falcon And The Winter Soldier</i>	Disney+	Disney+	Action and Adventure	13.5
9 <i>Cobra Kai</i>	Netflix	Netflix	Comedy	12.9
10 <i>The Boys</i>	Amazon Prime Video	Amazon Prime Video	Action and Adventure	12.9
11 <i>Star Trek: Discovery</i>	Paramount+	Paramount+	Drama	12.6
12 <i>The Crown</i>	Netflix	Netflix	Drama	11.9
13 <i>Only Murders In The Building</i>	Disney+	Hulu	Drama	11.7
14 <i>Loki</i>	Disney+	Disney+	Action and Adventure	11.6
15 <i>Star Wars: The Clone Wars</i>	Disney+	Disney+	Children	11.3
16 <i>Arcane</i>	Netflix	Netflix	Action and Adventure	11.0
17 <i>The Witcher</i>	Netflix	Netflix	Action and Adventure	11.0
18 <i>Lucifer</i>	Netflix	Netflix	Drama	11.0
19 <i>Titans</i>	--	HBO Max	Action and Adventure	10.2
20 <i>For All Mankind</i>	Apple TV+	Apple TV+	Drama	10.2

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

21 <i>Trailer Park Boys</i>	Netflix	Netflix	Comedy	9.9
62 <i>Creepshow</i>	Shudder	Shudder	Horror	5.3
88 <i>Castle Rock</i>	Crave	Hulu	Horror	3.9
90 <i>The Mighty Ducks: Game Changers</i>	Disney+	Disney+	Comedy	3.8
103 <i>The Challenge: All Stars</i>	Paramount+	Paramount+	Reality	3.5

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

-- No platform information available, please refer to appendix



 UNITED STATES

 AUSTRALIA

 BRAZIL

 CANADA

 FRANCE

 GERMANY

 ITALY

 MEXICO

 SPAIN

 UNITED KINGDOM

# FRANCE

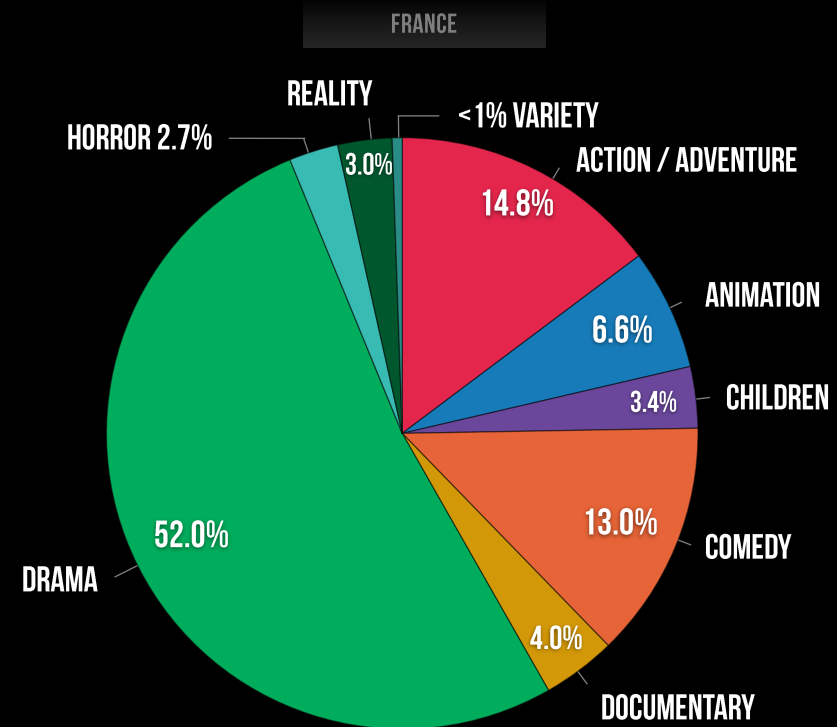
Learn which genres and subgenres of digital originals are most demanded by French audiences. Discover the demand share of the leading SVOD platforms over the past 24 months and explore demand for the top streaming originals.



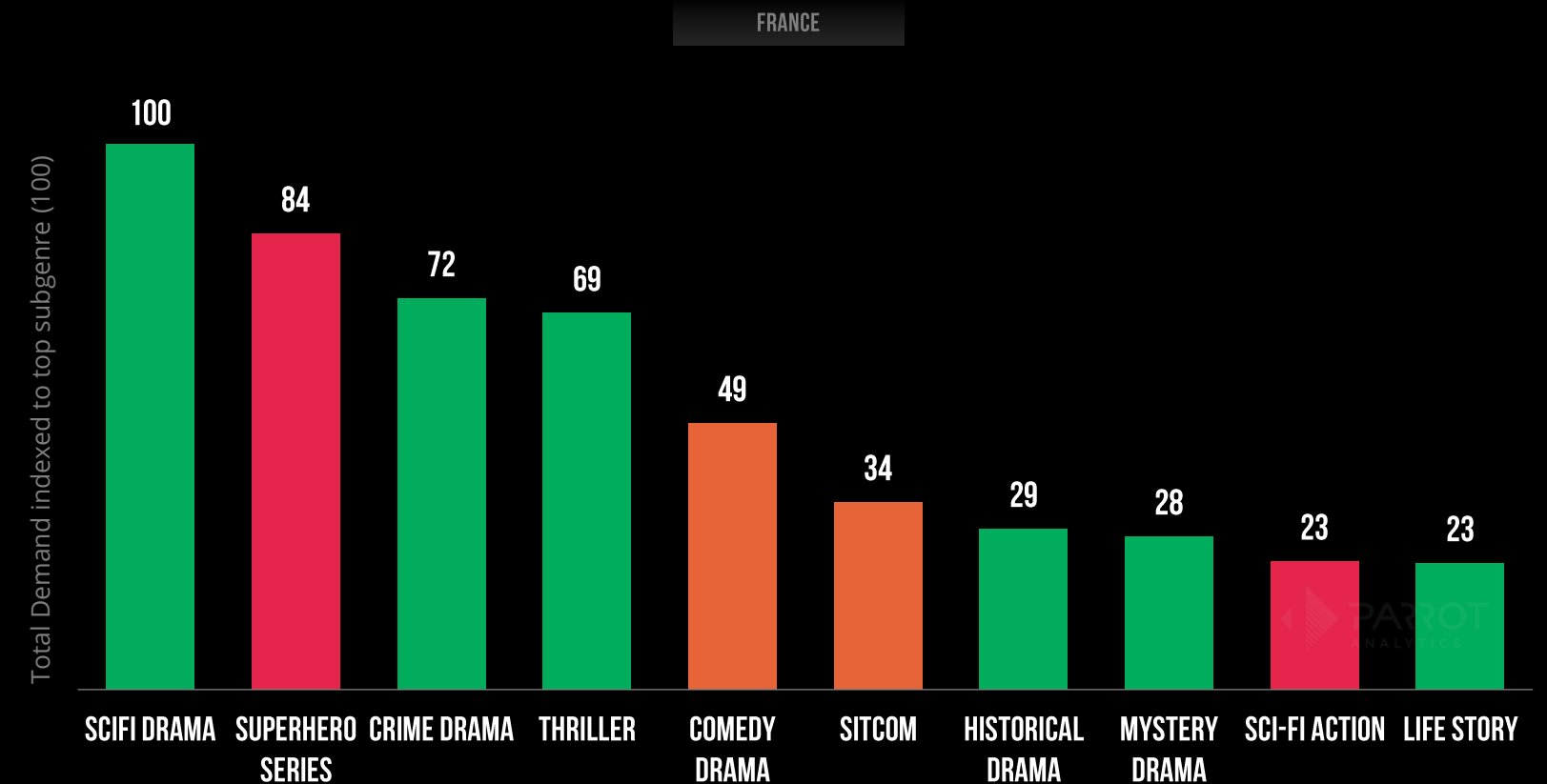
**NOTE:** The insights presented in this section are based on the entire available Parrot Analytics global TV demand dataset, which is comprised of 3.5 trillion data points across 100+ languages in 100+ countries.

# France Digital Original Genre and Subgenre Preferences

Digital original series **genre** demand share in 2021



The 10 most in-demand **subgenres** for digital originals in 2021

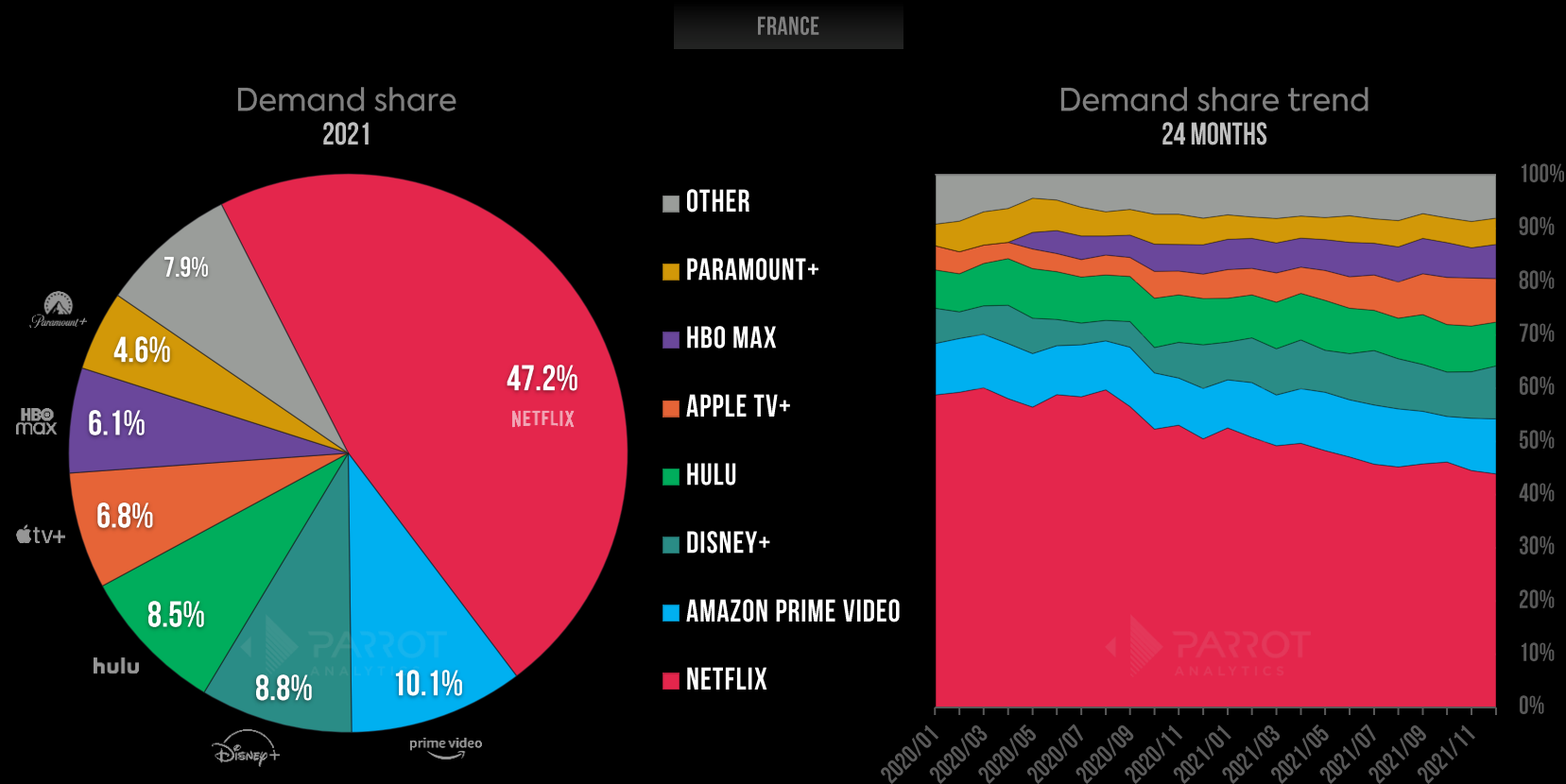


- France was one of three markets in this report (along with Spain and Italy) where drama accounted for a larger than 50% share of demand for digital originals in 2021.
- A result of drama’s popularity in France is that comedy has the second lowest share of demand in France of markets in this report. The genre’s 13% share of demand this year was a decrease from its 14.2% share in 2020.
- Animation saw a more than 50% growth in its demand share in France this year. In 2020, animation accounted for a 4.0% share of demand but that has increased to 6.6% this year.

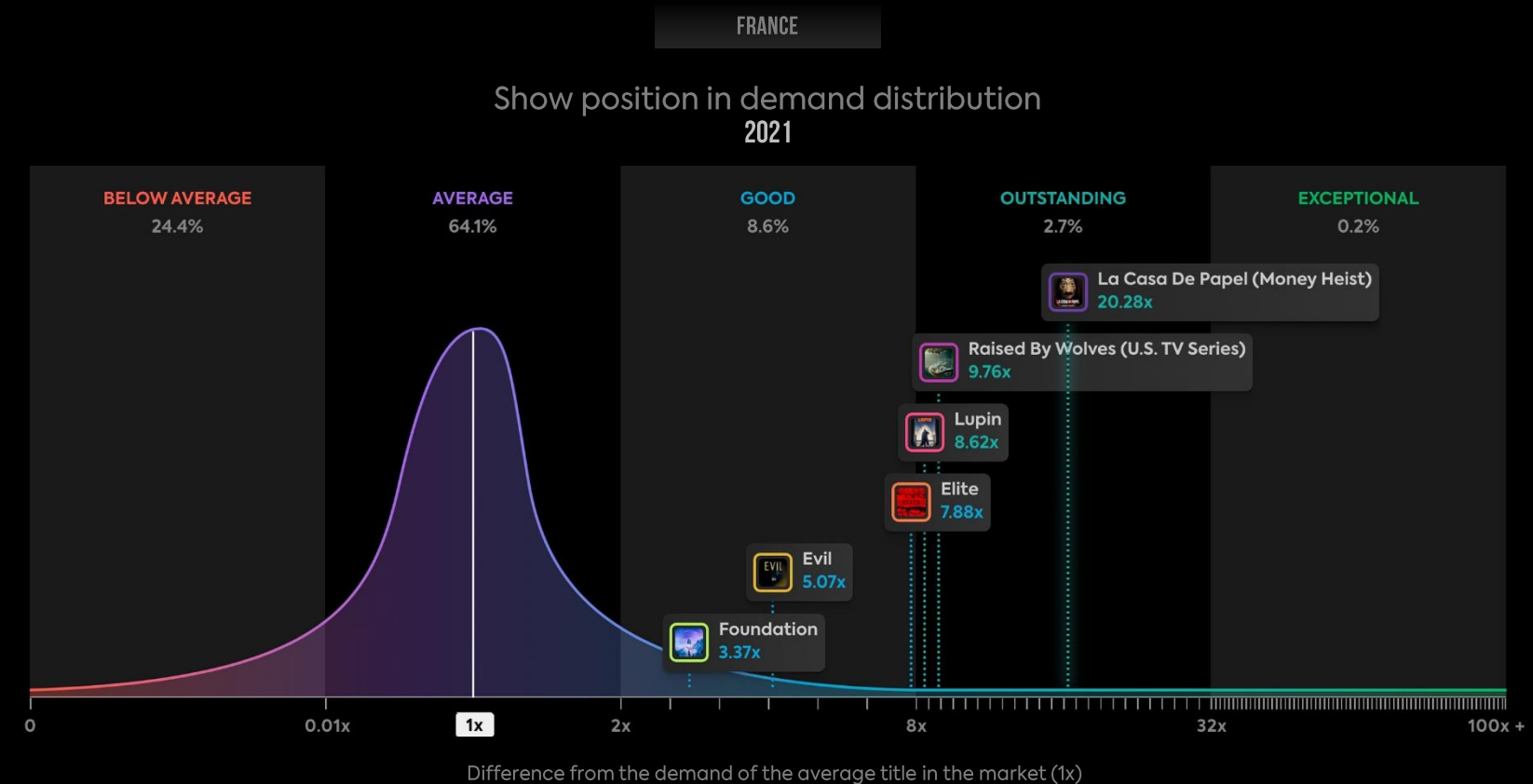
- France was one of four markets in this report where sci-fi drama was the most in-demand subgenre of the year. In France, sci-fi drama had the greatest lead over the second ranked subgenre.
- Historical dramas have caught audiences’ attention in France. This was one of three markets in this report (along with Italy and the UK) where this subgenre was ranked highest as the 7<sup>th</sup> most in-demand subgenre for the year.
- France was one of only two markets in this report where mystery drama ranked in the top ten most in-demand subgenres for the year.

# France Platform Demand Share and Digital Originals Demand Distribution

Market demand share by original platform for all digital originals



Demand distribution of a selection of top digital originals

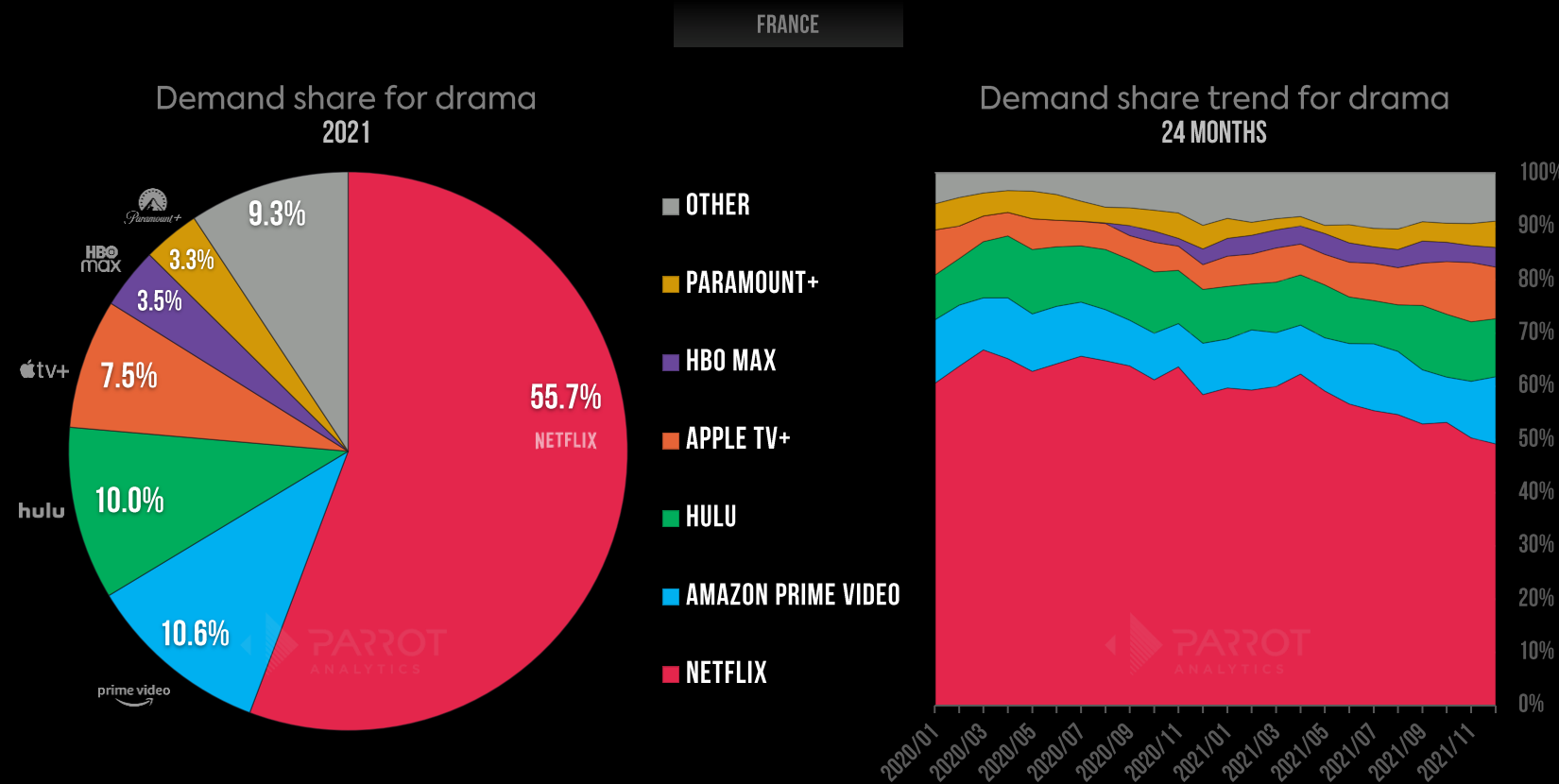


- Netflix has lost 10% of its demand share in France over the past year. In 2020, Netflix originals accounted for 57.2% of demand here but this year that has dropped to 47.2% – barely above the platform’s global share of demand (47.1%).
- France has one of the lower demand shares for Apple TV+ originals in this report. Originals from the platform made up 6.8% of demand for all originals in 2021. However, the platform’s demand share surged toward the end of the year, peaking at 9% in November 2021.
- Amazon Prime Video’s demand held up well in the French market. As one of the more established platforms, it has been under assault from new competitors around the world. It managed to slightly grow its demand share in France to 10.1% in 2021, up from 10.0% in 2020.

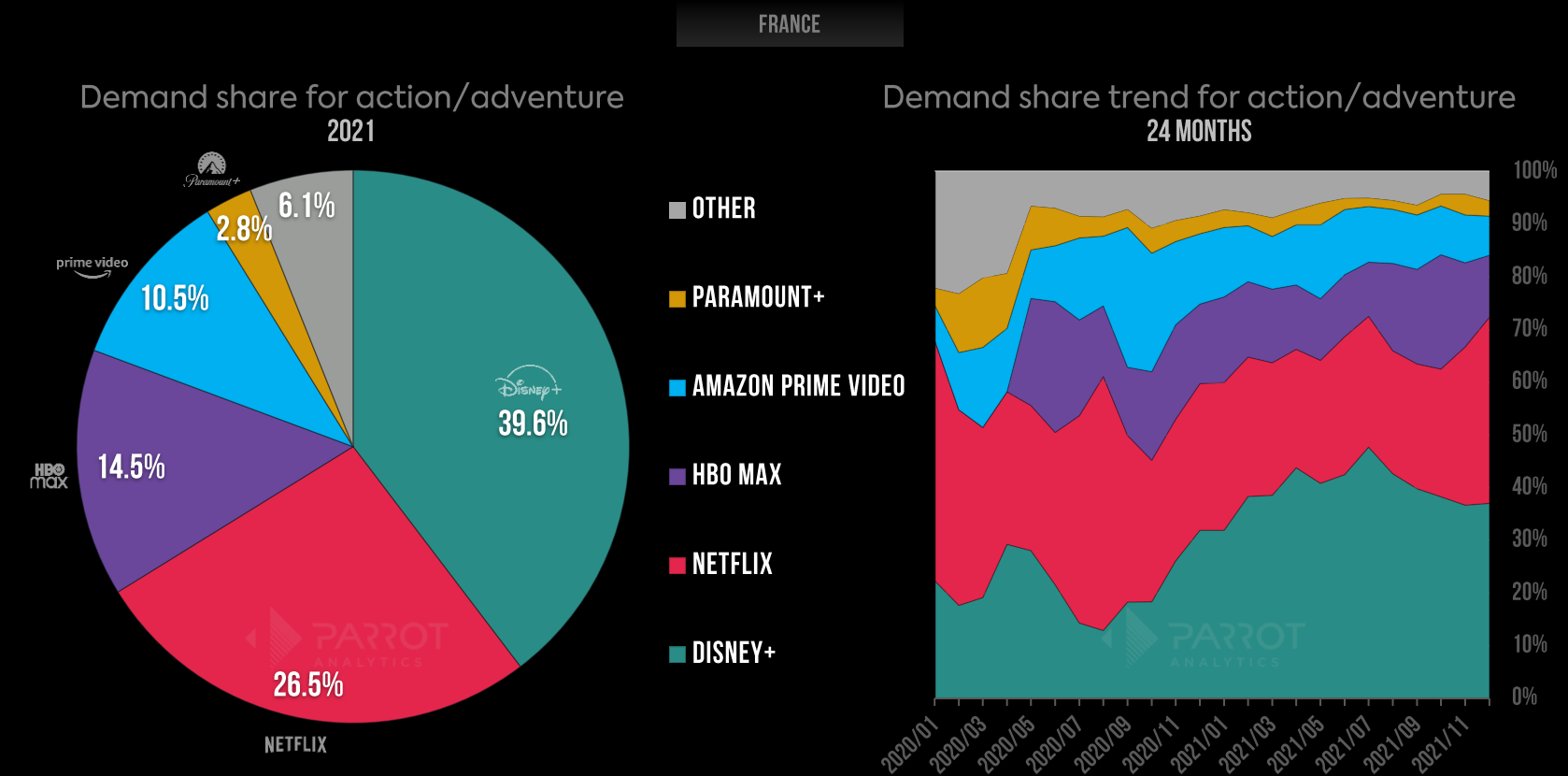
- 2021’s most in-demand digital original series in France is **La Casa de Papel**. It has 20.28 times more demand than the average title.
- Unsurprisingly, Netflix’s French drama, **Lupin**, excelled in its home market where it ranked as the 20<sup>th</sup> most in-demand digital original series for the year.
- French demand for the drama genre crosses a variety of subgenres. Crime dramas (**La Casa de Papel**), Sci-fi dramas (**Raised by Wolves** and **Foundation**), and teen dramas (**Elite**) all ranked higher in France than other markets in this report.

# France Platform Demand Share for Drama & Action/Adventure Digital Originals

Market demand share by original platform for drama digital originals



Market demand share by original platform for action/adventure digital originals



- France was one of the three markets in this report with the largest share of demand for Netflix original dramas. In 2021 Netflix's dramas made up 55.7% of demand for the genre.
- However, in December 2021 Netflix's share of demand in this category finally fell below 50%.
- The share of demand in France for Apple TV+ original dramas surged in the last quarter of the year, peaking at an 11.1% share of demand in November.

- Originals from Disney+ made up 39.6% of demand for action adventure originals in France this year. The platform's share of demand peaked in July when it had a 47.7% share of demand in the genre.
- Netflix came closest to reclaiming the top spot in the action/adventure genre in December this year when it reached a 35.5% share of demand.
- The *Star Trek* franchise does not appeal as much to French audiences as it does in other markets. Paramount+, which relies heavily on these series, has a share of demand in the action/adventure genre here (2.8%) below its global share of demand (3.0%).



# Top Digital Original Series in France

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

SERIES NAME	IN-MARKET PLATFORM *	ORIGINAL PLATFORM	GENRE	DIFFERENCE FROM AVERAGE TITLE (1X) IN 2021
1 <i>La Casa De Papel (Money Heist)</i>	Netflix	Netflix	Drama	20.3
2 <i>Stranger Things</i>	Netflix	Netflix	Drama	19.3
3 <i>The Mandalorian</i>	Disney+	Disney+	Action and Adventure	18.8
4 <i>WandaVision</i>	Disney+	Disney+	Action and Adventure	17.9
5 <i>The Crown</i>	Netflix	Netflix	Drama	14.4
6 <i>The Handmaid's Tale</i>	Canal+	Hulu	Drama	13.9
7 <i>Arcane</i>	Netflix	Netflix	Action and Adventure	12.8
8 <i>Lucifer</i>	Netflix	Netflix	Drama	12.5
9 <i>The Expanse</i>	Amazon Prime Video	Amazon Prime Video	Drama	12.2
10 <i>The Boys</i>	Amazon Prime Video	Amazon Prime Video	Action and Adventure	12.2
11 <i>The Witcher</i>	Netflix	Netflix	Action and Adventure	10.8
12 <i>The Falcon And The Winter Soldier</i>	Disney+	Disney+	Action and Adventure	9.8
13 <i>Raised By Wolves (U.S. TV Series)</i>	Canal+	HBO Max	Drama	9.8
14 <i>The Queen's Gambit</i>	Netflix	Netflix	Drama	9.6
15 <i>Loki</i>	Disney+	Disney+	Action and Adventure	9.6
16 <i>Titans</i>	Netflix	HBO Max	Action and Adventure	9.3
17 <i>Bridgerton</i>	Netflix	Netflix	Drama	9.2
18 <i>Star Wars: The Clone Wars</i>	Disney+	Disney+	Children	9.2
19 <i>Ted Lasso</i>	Apple TV+	Apple TV+	Comedy	8.8
20 <i>Lupin</i>	Netflix	Netflix	Drama	8.6

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

25 <i>Elite</i>	Netflix	Netflix	Drama	7.9
49 <i>Evil</i>	SALTO	Paramount+	Drama	5.1
83 <i>Foundation</i>	Apple TV+	Apple TV+	Drama	3.4
100 <i>The Wilds</i>	Amazon Prime Video	Amazon Prime Video	Drama	3.0
109 <i>Mrs. America</i>	Canal+	Hulu	Drama	2.8

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

-- No platform information available, please refer to appendix



# GERMANY

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

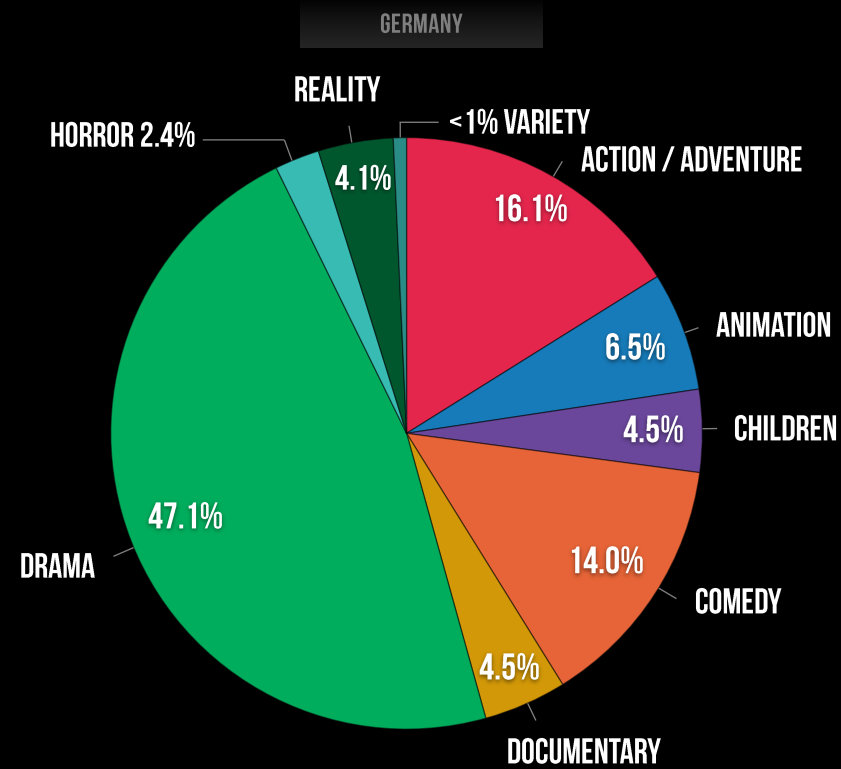


**NOTE:** The insights presented in this section are based on the entire available Parrot Analytics global TV demand dataset, which is comprised of 3.5 trillion data points across 100+ languages in 100+ countries.

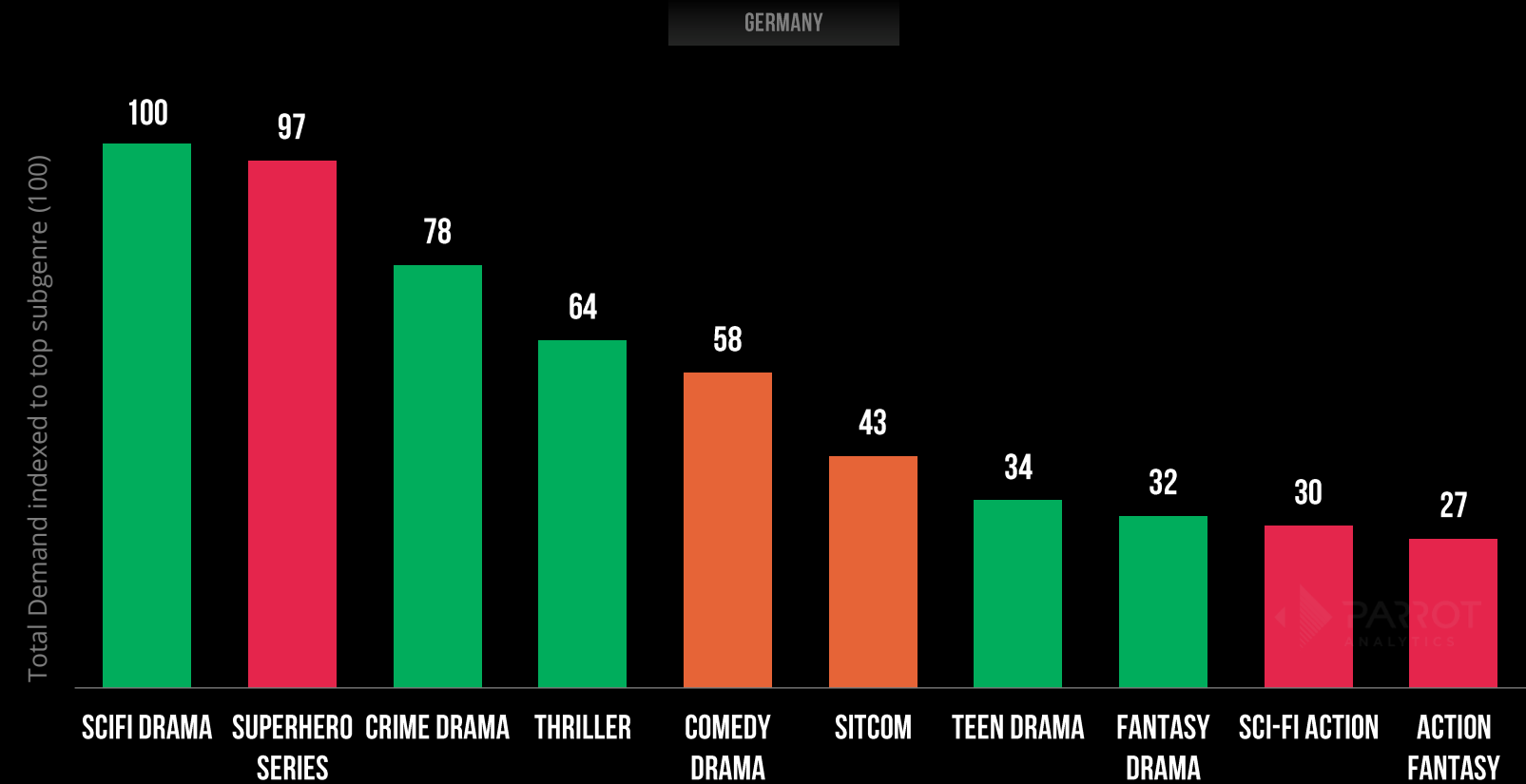


# Germany Digital Original Genre and Subgenre Preferences

Digital original series **genre** demand share in 2021



The 10 most in-demand **subgenres** for digital originals in 2021



- German audiences gave their greatest share of demand for digital originals in the drama genre in 2021. The genre’s 47.1% share of demand here is below its global share of demand – 48.3%.
- The share of demand for comedy originals in Germany fell year-on-year. In 2021, 14% of demand for original series was for a comedy compared to 16% last year.
- As with many markets covered in this report, the share of demand for animated original content in Germany increased in 2021 (to 6.5% from 4% in 2020).

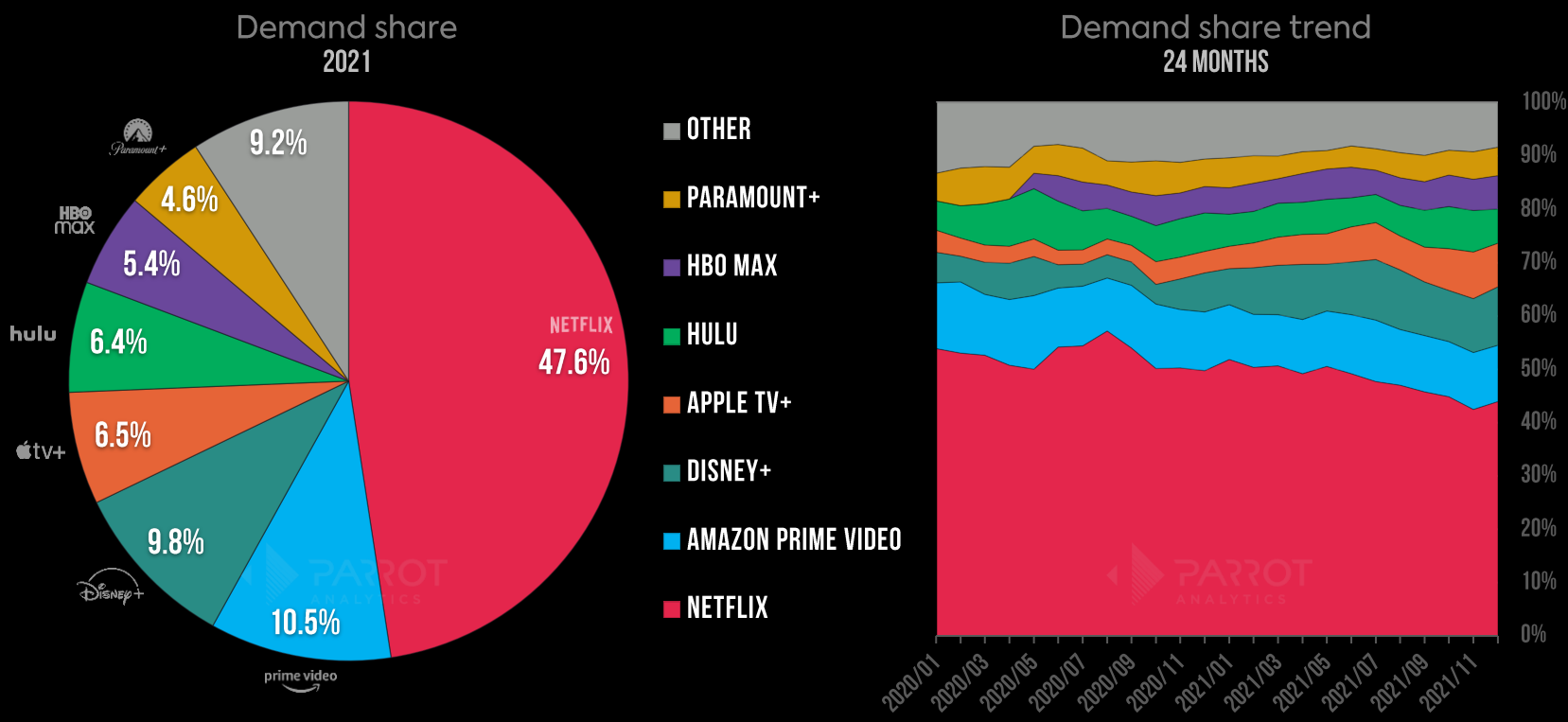
- Germany was one of the four markets in this report where sci-fi drama was the most in-demand digital original subgenre for the year. It just edged out superhero series, which had only 3% less demand for the year.
- Teen drama ranked higher in Germany than in any other market in this report as the 7<sup>th</sup> most in-demand subgenre in 2021.
- Germany was the only market in this report where action fantasy ranked among the ten most in-demand subgenres for the year.



# Germany Platform Demand Share and Digital Originals Demand Distribution

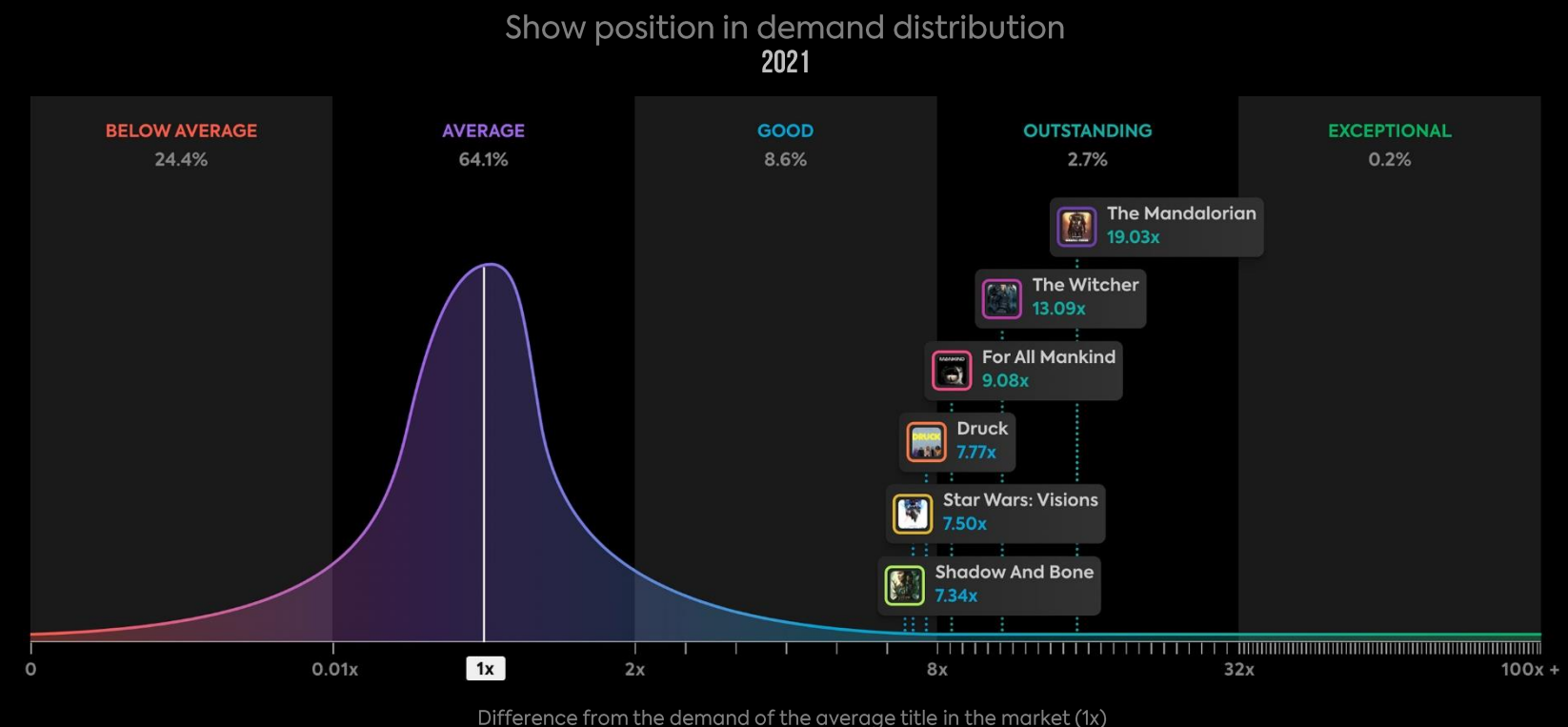
Market demand share by original platform for all digital originals

GERMANY



Demand distribution of a selection of top digital originals

GERMANY



- In Germany, demand for Netflix originals accounted for 47.6% of demand for all digital originals in 2021. This is the platform's second largest share in this report, but a decrease from where it was in Germany in 2020 – 52.9%.
- Apple TV+'s share of demand in the German market has visibly ballooned over the course of 2021, increasing almost each month of the year and ending in December at an 8.2% share of demand for original series.
- 2021 was also a huge year for Disney+, whose demand growth kicked off in October 2020 with season 2 of *The Mandalorian* and never slowed down. However, Disney+ was unable to overtake Amazon Prime Video's share of demand for the year in Germany.

- The Mandalorian* was the most in-demand original series in Germany this year, with 19.03 times the average series demand. Space themed series are popular in Germany. *Star Wars: Visions* and *For All Mankind* ranked higher in Germany than in any other market in this report.
- The fantasy genre also captures the attention of German audiences. *The Witcher* and *Shadow and Bone* ranked higher here (8<sup>th</sup> and 28<sup>th</sup> respectively) than in any other market in this report.
- Druck*, the German adaptation of *Skam* franchise, performs consistently well in Germany where it had 7.77 times the average series demand for the year and ranked as the 25<sup>th</sup> most in-demand digital original.



# Germany Platform Demand Share for Drama & Action/Adventure Digital Originals

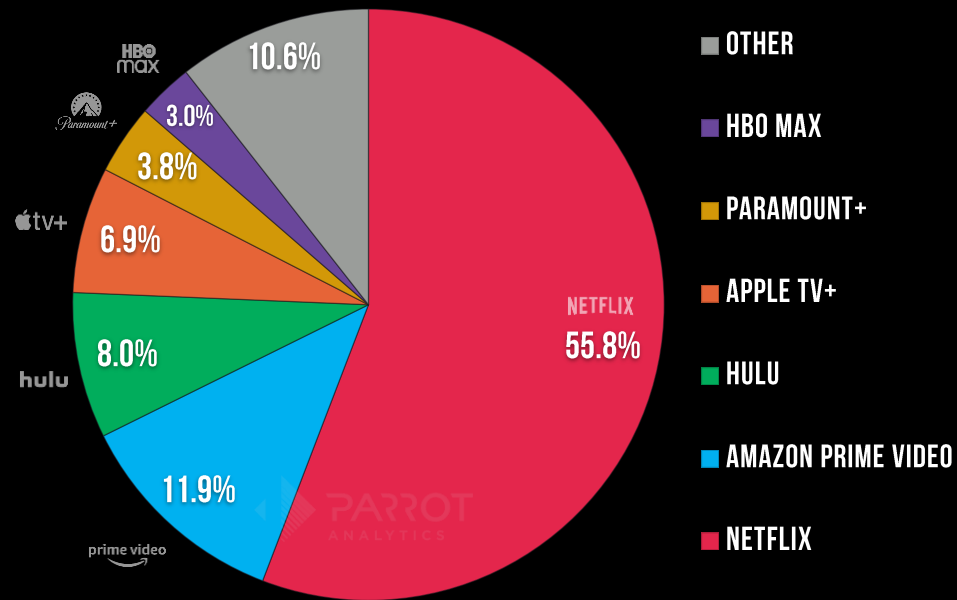
Market demand share by original platform for drama digital originals

Market demand share by original platform for action/adventure digital originals

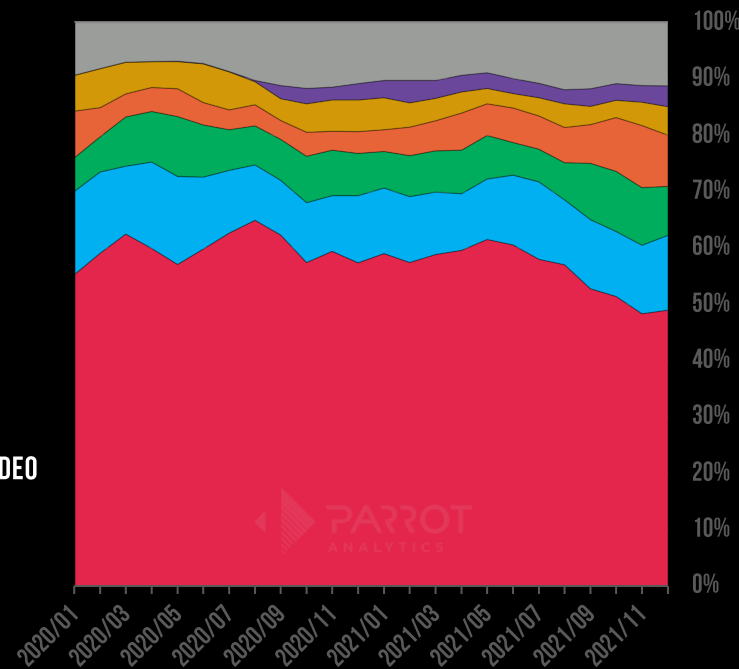
GERMANY

GERMANY

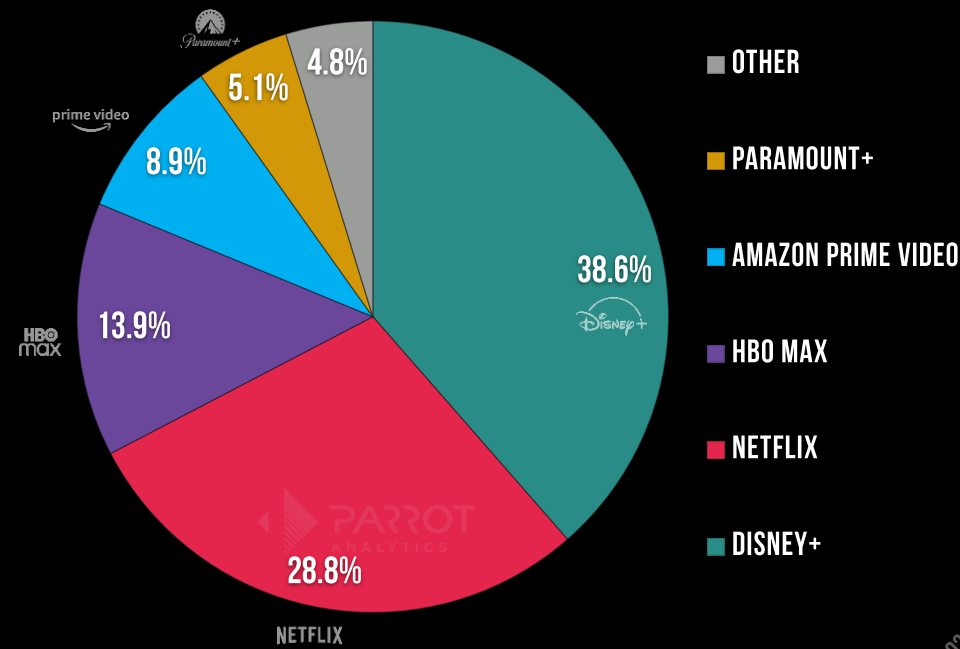
Demand share for drama 2021



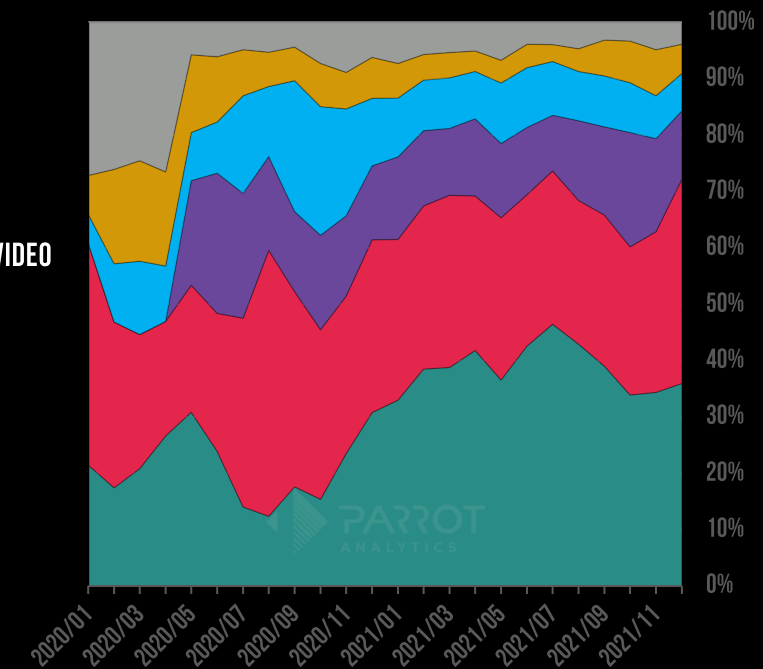
Demand share trend for drama 24 MONTHS



Demand share for action/adventure 2021



Demand share trend for action/adventure 24 MONTHS



- Netflix maintained a share of demand for original dramas in Germany (55.8%) above its share of global demand for dramas (51.3%). However, starting in June 2021 Netflix's share of drama demand began to decline steeply and it finally fell below 50% in November 2021 when it hit 48.3%.
- Hulu's demand share of original dramas hit a two year high in October 2021 when it reached a 10.7% share of demand in the genre, boosted by the strength of several new original dramas including *Nine Perfect Strangers*.
- HBO Max original dramas struggled to catch on in Germany this year. The platform's 3.0% share of demand for original dramas was tied with the US as the lowest in this report.

- Netflix had one of the largest demand shares for original action/adventure content in Germany in this report. With a 28.8% share of demand in the action/adventure genre Netflix had a larger demand share only in the US.
- There is strong demand in Germany for *Star Trek* content from Paramount+. The platform's action/adventure originals accounted for a 5.1% share of demand in the genre here.
- Netflix's share of demand for action/adventure originals reached a high point this year in December when the platform's originals accounted for 36.2% of demand for all original action/adventure series. It just barely overtook Disney (which had a 36.0% share) in December.



# Top Digital Original Series in Germany

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

SERIES NAME	IN-MARKET PLATFORM *	ORIGINAL PLATFORM	GENRE	DIFFERENCE FROM AVERAGE TITLE (1X) IN 2021
1 <i>The Mandalorian</i>	Disney+	Disney+	Action and Adventure	19.0
2 <i>WandaVision</i>	Disney+	Disney+	Action and Adventure	17.8
3 <i>La Casa De Papel (Money Heist)</i>	Netflix	Netflix	Drama	15.4
4 <i>Stranger Things</i>	Netflix	Netflix	Drama	14.7
5 <i>Lucifer</i>	Netflix	Netflix	Drama	13.7
6 <i>Dark</i>	Netflix	Netflix	Drama	13.5
7 <i>The Expanse</i>	Amazon Prime Video	Amazon Prime Video	Drama	13.2
8 <i>The Witcher</i>	Netflix	Netflix	Action and Adventure	13.1
9 <i>The Falcon And The Winter Soldier</i>	Disney+	Disney+	Action and Adventure	11.8
10 <i>Loki</i>	Disney+	Disney+	Action and Adventure	11.3
11 <i>Arcane</i>	Netflix	Netflix	Action and Adventure	10.6
12 <i>Cowboy Bebop</i>	Netflix	Netflix	Action and Adventure	10.5
13 <i>Star Trek: Discovery</i>	Pluto TV	Paramount+	Drama	10.4
14 <i>The Boys</i>	Amazon Prime Video	Amazon Prime Video	Action and Adventure	10.0
15 <i>Titans</i>	Netflix	HBO Max	Action and Adventure	9.3
16 <i>The Handmaid's Tale</i>	EntertainTV	Hulu	Drama	9.3
17 <i>Star Wars: The Clone Wars</i>	Disney+	Disney+	Children	9.2
18 <i>For All Mankind</i>	Apple TV+	Apple TV+	Drama	9.1
19 <i>Ted Lasso</i>	Apple TV+	Apple TV+	Comedy	9.0
20 <i>The Crown</i>	Netflix	Netflix	Drama	8.9

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

25 <i>Druck</i>	Funk	Funk	Drama	7.8
26 <i>Star Wars: Visions</i>	Disney+	Disney+	Animation	7.5
28 <i>Shadow And Bone</i>	Netflix	Netflix	Drama	7.3
102 <i>Dogs Of Berlin</i>	Netflix	Netflix	Drama	2.9
142 <i>Wir Kinder Vom Bahnhof Zoo</i>	Amazon Prime Video	Amazon Prime Video	Drama	2.3

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

-- No platform information available, please refer to appendix

# GLOBAL TV DEMAND AWARDS™

## Attack on Titan's Worldwide Takeover



**Douglas Montgomery**

Founder & CEO

global connects



**Yuichiro Hayashi**

Director



Japanese anime series *Attack on Titan* captured global attention in 2021 when it was named the most in-demand TV show of 2021 as well as the most in-demand anime.

*Attack on Titan* director Yuichiro Hayashi and Global Connects founder and CEO Douglas Montgomery discuss the success of the show and the shocking differences between anime budgets and the typical Hollywood spend for a show.

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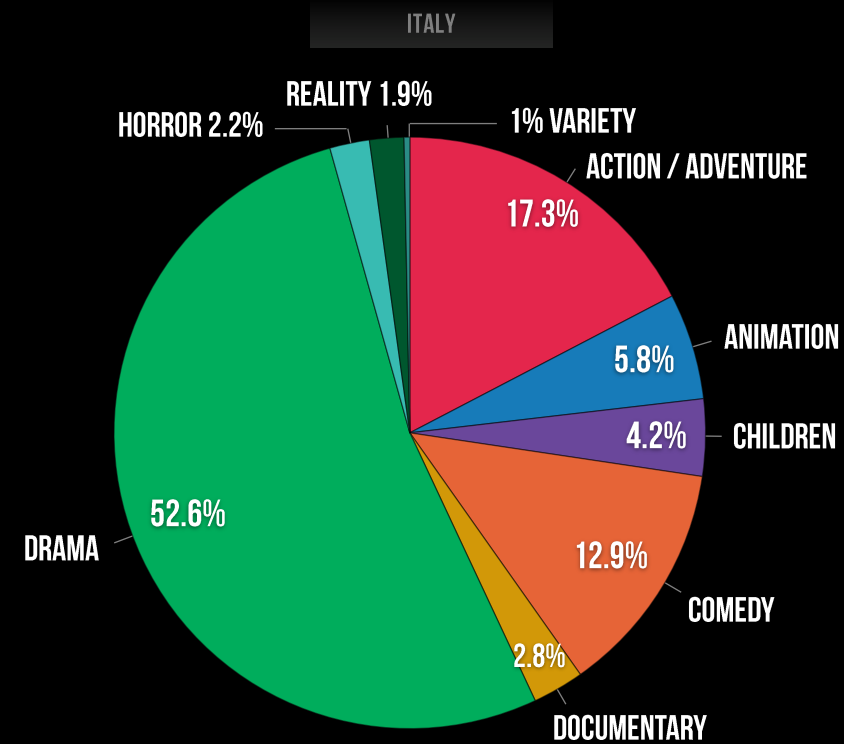
# ITALY

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

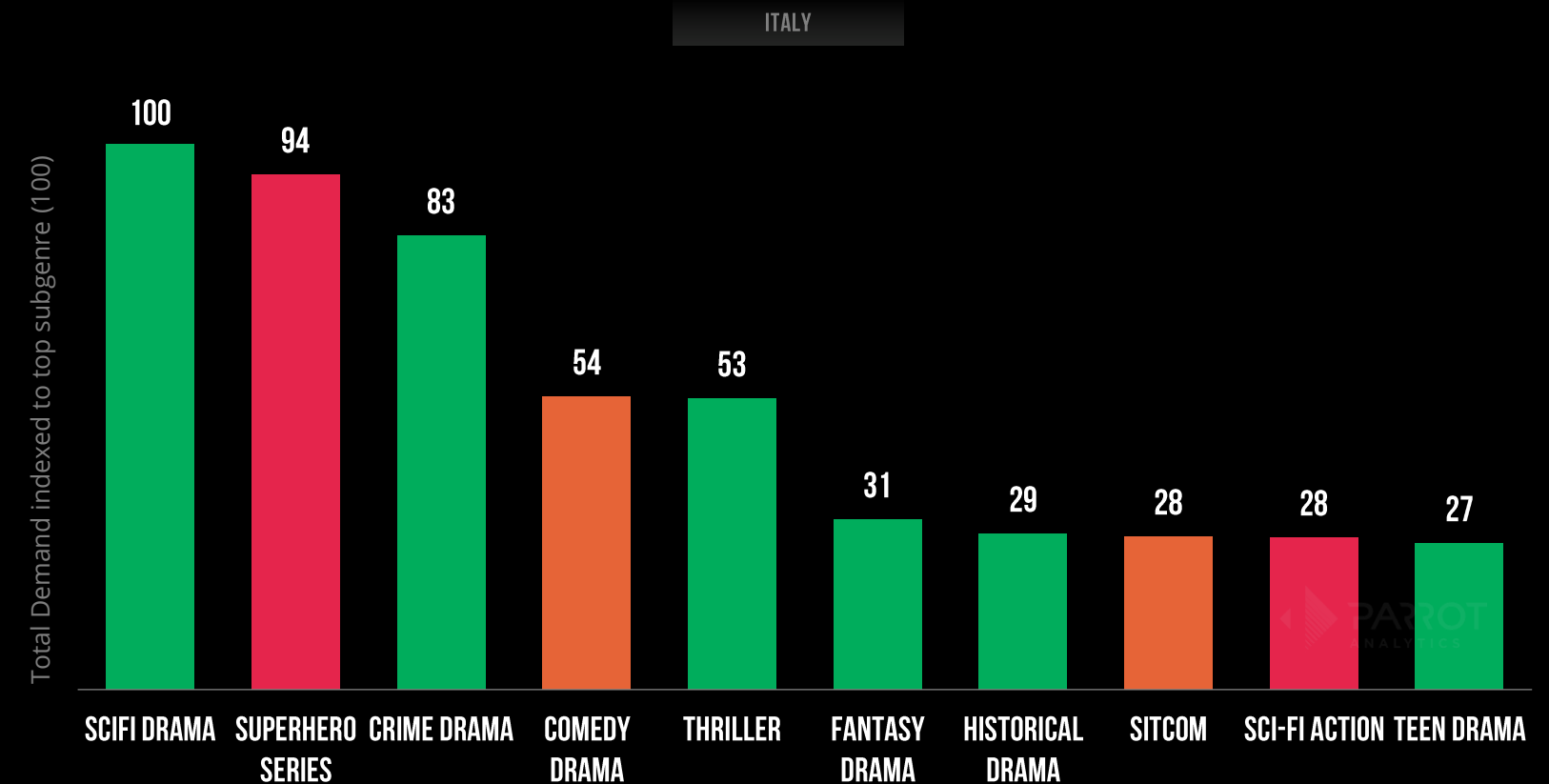
**NOTE:** The insights presented in this section are based on the entire available Parrot Analytics global TV demand dataset, which is comprised of 3.5 trillion data points across 100+ languages in 100+ countries.

# Italy Digital Original Genre and Subgenre Preferences

Digital original series **genre** demand share in 2021



The 10 most in-demand **subgenres** for digital originals in 2021



- With 52.6% demand share, drama is the most in-demand genre in Italy for 2021. While last year, Italy was the most drama loving market we covered, this year it has been surpassed by Spain in this report.
- In contrast, comedy captured only 12.9% of Italian audiences' attention in 2021. This is the smallest share for that genre across all markets in this report, but it is up slightly from its 12.6% share in 2020.
- Italians had a share of demand for the documentary genre (2.8%) that was less than half of the global demand share for this genre (6.0%).

- Fantasy drama was a uniquely successful subgenre in Italy this year. It was the 6<sup>th</sup> most in-demand digital original subgenre in 2021, a higher rank than in any other market in this report.
- Italian audiences have low demand for comedies, but sitcoms in particular struggle to succeed here. As the 8<sup>th</sup> most in-demand subgenre, sitcom ranked lower in Italy than in any other market in this report.
- However, comedy drama still performed well. As the 4<sup>th</sup> most in-demand subgenre it ranked higher than in half the markets in this report. It seems that the drama-loving Italian market appreciates a dash of drama in its comedies as well.



# Italy Platform Demand Share and Digital Originals Demand Distribution

Market demand share by original platform for all digital originals

Demand distribution of a selection of top digital originals

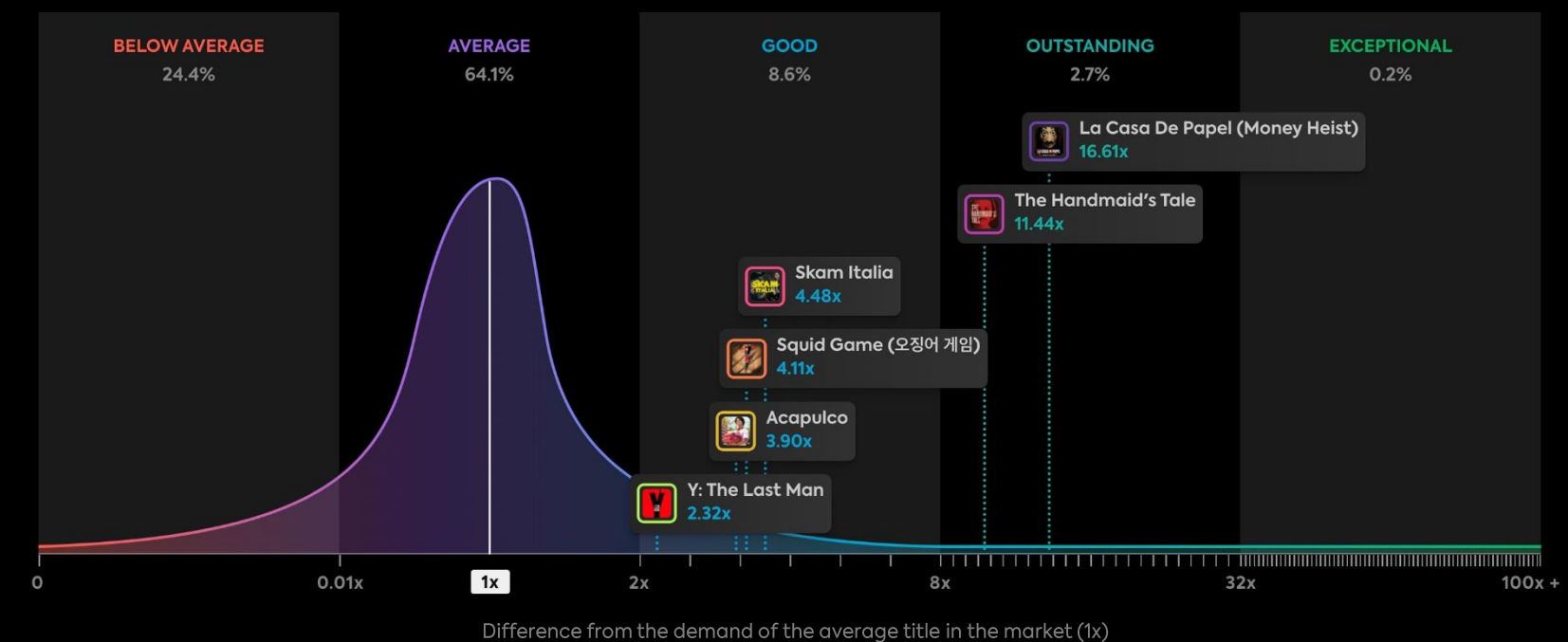
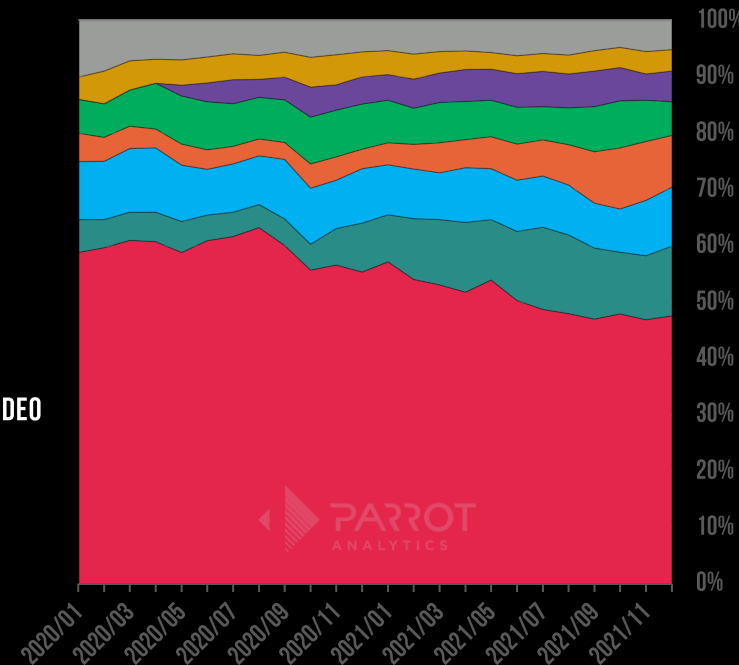
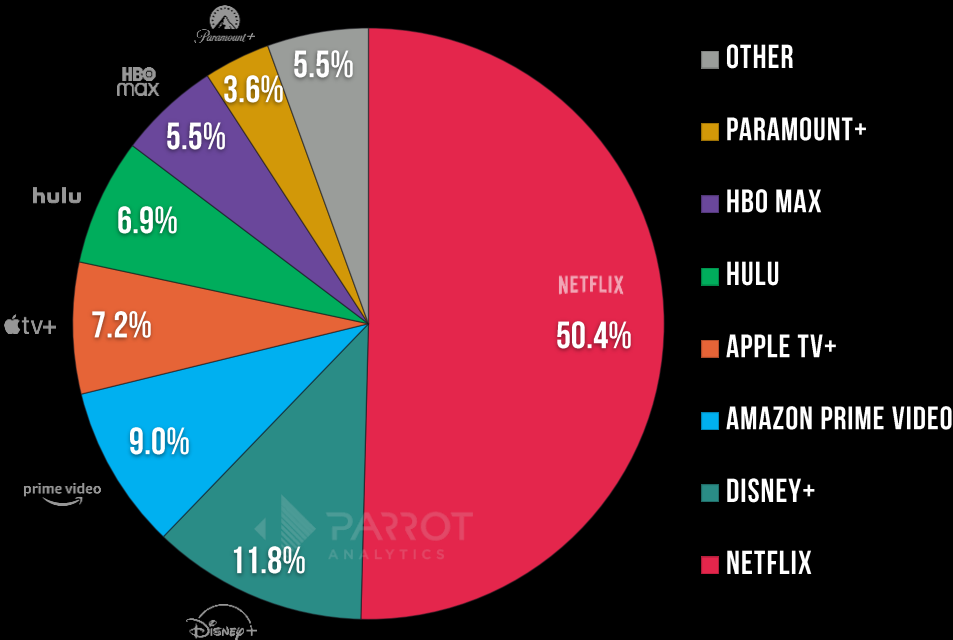
ITALY

ITALY

Demand share 2021

Demand share trend 24 MONTHS

Show position in demand distribution 2021



- Italy was the only market in this report where Netflix had a greater than 50% share of demand in 2021. This is down from last year when it had a 60% share.
- Italy was one of four markets in this report where the share of demand for Disney+ originals (11.8%) surpassed Amazon Prime Video's share (9.0%).
- Italy has one of the smallest shares of demand coming from Other platforms not broken out here. Only 5.5% of demand for digital originals in 2021 was for an original series not from one of the above platforms.

- As with two other market in this report (France and Spain), **La Casa de Papel** was the most in-demand digital original in Italy for the year with 16.61 times the average series demand.
- The Handmaid's Tale**, while popular around the world, found particular success in Italy this year where it had 11.44 times the average series demand and ranked as the 4<sup>th</sup> most in-demand digital original – higher than in any other market in this report.
- Apple TV+'s comedy, **Acapulco**, performed well in Italy this year. It had 3.9 times the average series demand and ranked higher here than any other market in this report.

# Italy Platform Demand Share for Drama and Action/Adventure Digital Originals

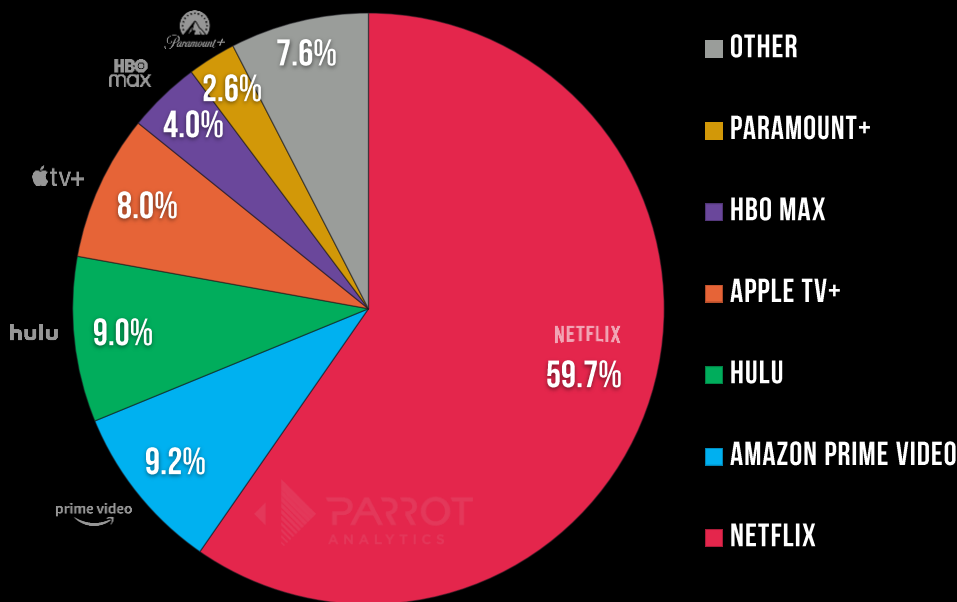
Market demand share by original platform for drama digital originals

ITALY

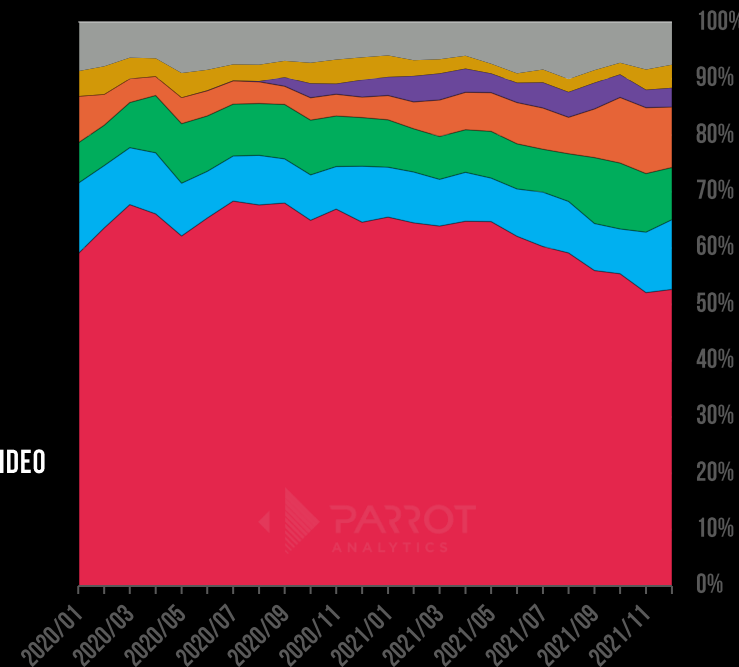
Market demand share by original platform for action/adventure digital originals

ITALY

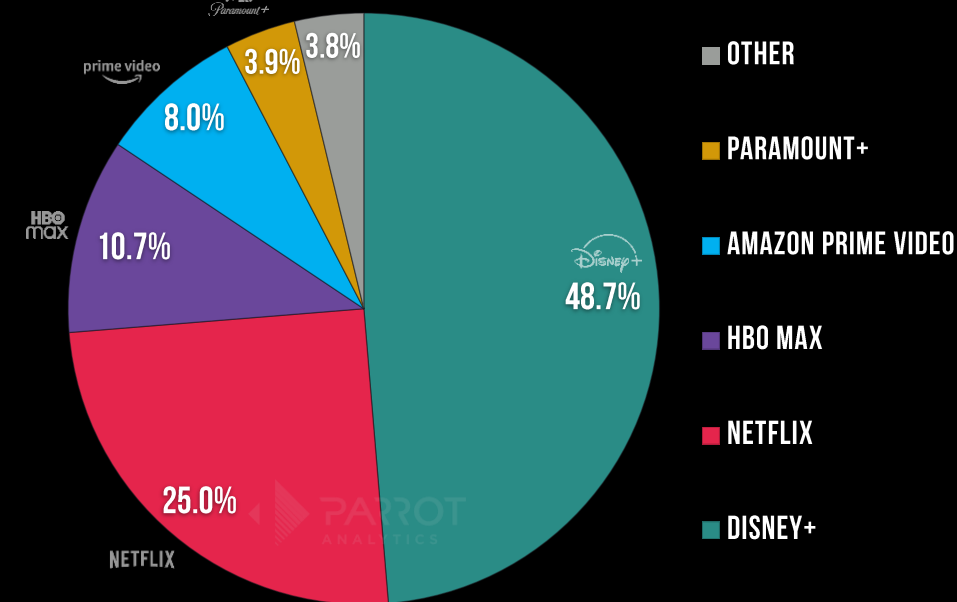
Demand share for drama 2021



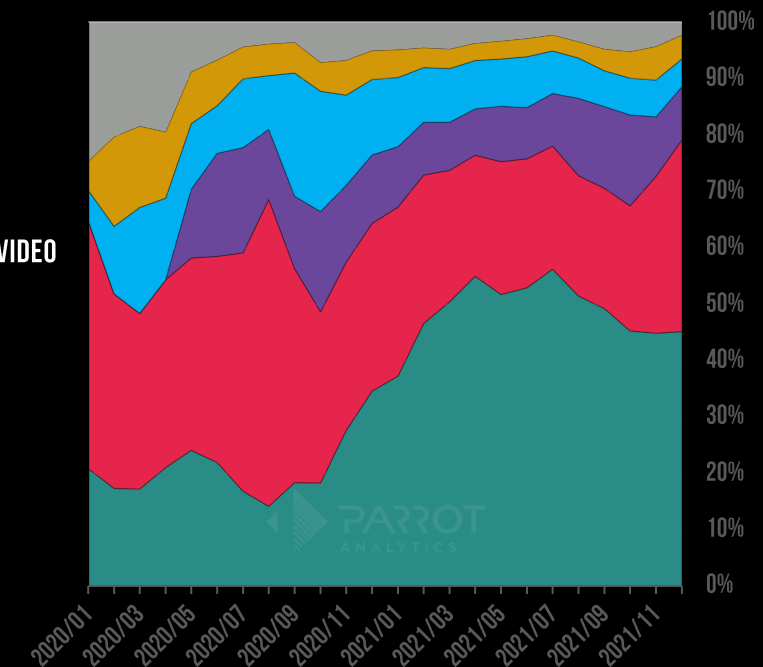
Demand share trend for drama 24 MONTHS



Demand share for action/adventure 2021



Demand share trend for action/adventure 24 MONTHS



- Italy was the market in this report with the largest share of demand for Netflix’s original dramas. 59.7% of demand for original dramas was for a Netflix original in Italy this year.
- Amazon has suffered the most as a result of Netflix’s dominance here. Its share of demand for original dramas (9.2%) was among the lowest of markets in this report and well below its global share of demand for dramas (13.0%).
- HBO Max dramas succeeded despite Netflix’s strength in the Italian market. 4.0% of demand for original dramas was for an HBO Max original – above the platform’s global share of demand in this genre (2.9%).

- Disney+ has strong demand for its action/adventure originals in Italy. Its originals nearly made up 50% of demand for the action/adventure genre this year, falling just short at 48.7%
- HBO Max originals made up a smaller share of demand for the action/adventure genre in Italy than in any other market in this report. The platform’s 10.7% share of demand in Italy was below its global share of demand in the genre (13.2%).
- Amazon Prime Video struggled in the action/adventure genre this year. The share of demand for its originals in Italy hit a two year low point in December when it reached 5.0%.





# Top Digital Original Series in Italy

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

SERIES NAME	IN-MARKET PLATFORM *	ORIGINAL PLATFORM	GENRE	DIFFERENCE FROM AVERAGE TITLE (1X) IN 2021
1 <i>La Casa De Papel (Money Heist)</i>	Netflix	Netflix	Drama	16.6
2 <i>WandaVision</i>	Disney+	Disney+	Action and Adventure	16.5
3 <i>The Mandalorian</i>	Disney+	Disney+	Action and Adventure	15.2
4 <i>The Handmaid's Tale</i>	Timvision	Hulu	Drama	11.4
5 <i>The Falcon And The Winter Soldier</i>	Disney+	Disney+	Action and Adventure	11.3
6 <i>Stranger Things</i>	Netflix	Netflix	Drama	10.8
7 <i>Lucifer</i>	Netflix	Netflix	Drama	10.1
8 <i>Tear Along The Dotted Line</i>	Netflix	Netflix	Animation	9.3
9 <i>Loki</i>	Disney+	Disney+	Action and Adventure	8.9
10 <i>The Queen's Gambit</i>	Netflix	Netflix	Drama	8.9
11 <i>The Crown</i>	Netflix	Netflix	Drama	8.8
12 <i>Cobra Kai</i>	Netflix	Netflix	Comedy	8.8
13 <i>Dark</i>	Netflix	Netflix	Drama	8.1
14 <i>Bridgerton</i>	Netflix	Netflix	Drama	7.7
15 <i>Titans</i>	Netflix	HBO Max	Action and Adventure	7.4
16 <i>Suburra</i>	Netflix	Netflix	Drama	7.4
17 <i>The Witcher</i>	Netflix	Netflix	Action and Adventure	7.4
18 <i>Ted Lasso</i>	Apple TV+	Apple TV+	Comedy	7.1
19 <i>Arcane</i>	Netflix	Netflix	Action and Adventure	6.9
20 <i>Only Murders In The Building</i>	Disney+	Hulu	Drama	6.7

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

33 <i>Skam Italia</i>	Timvision	Timvision	Drama	4.5
37 <i>Squid Game</i>	Netflix	Netflix	Drama	4.1
41 <i>Acapulco</i>	Apple TV+	Apple TV+	Comedy	3.9
73 <i>Y: The Last Man</i>	Disney+	Hulu	Drama	2.3
107 <i>Celebrity Hunted – Caccia All'uomo</i>	Amazon Prime Video	Amazon Prime Video	Reality	1.7

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

-- No platform information available, please refer to appendix



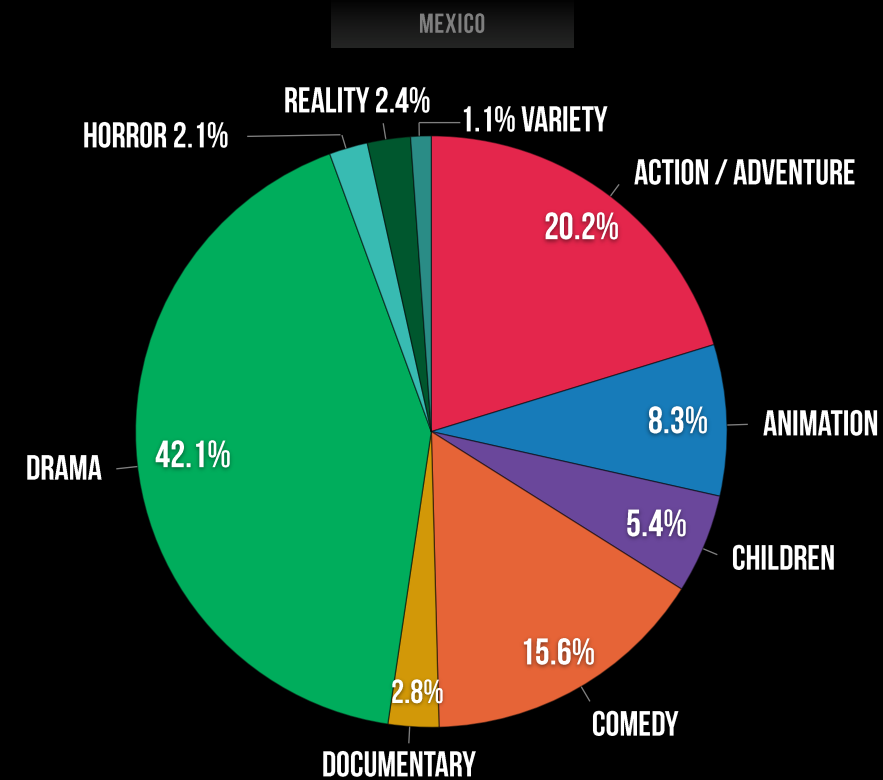
# MEXICO

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

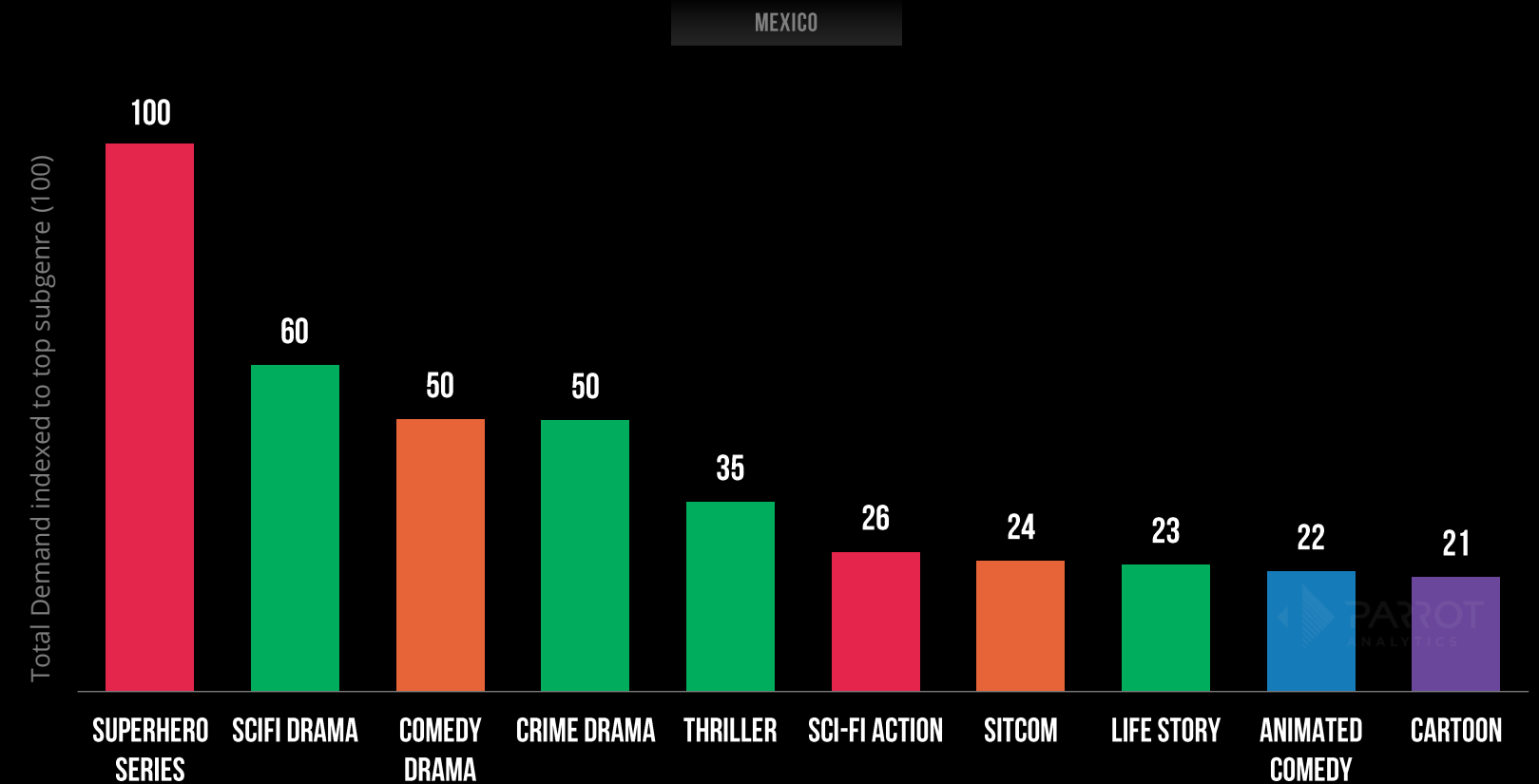
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# Mexico Digital Original Genre and Subgenre Preferences

Digital original series **genre** demand share in 2021



The 10 most in-demand **subgenres** for digital originals in 2021



- Mexico had the largest share of demand for action/adventure originals of markets in this report. Over a fifth of Mexican demand for digital original series was for an action/adventure original in 2021.
- Mexican audiences also gave a larger share of demand for animated digital originals than any other market in this report, with an 8.3% share in 2021.
- The 5.4% share of demand for children’s series in Mexico is the third largest share of demand for the genre in this report and above the global average (4.0%).

- Superhero series was the most in-demand digital original subgenre in Mexico in 2021. Additionally it had the largest lead in this report over the second ranked subgenre, sci-fi drama, which had 40% less demand in 2021.
- Sci-fi action was the 6<sup>th</sup> most in-demand digital original subgenre in Mexico in 2021. This was the highest rank it achieved across all markets in this report.
- The comedy drama subgenre found success in Mexico this year. It was the third most in-demand subgenre for the year and ranked higher in only the US in this report.



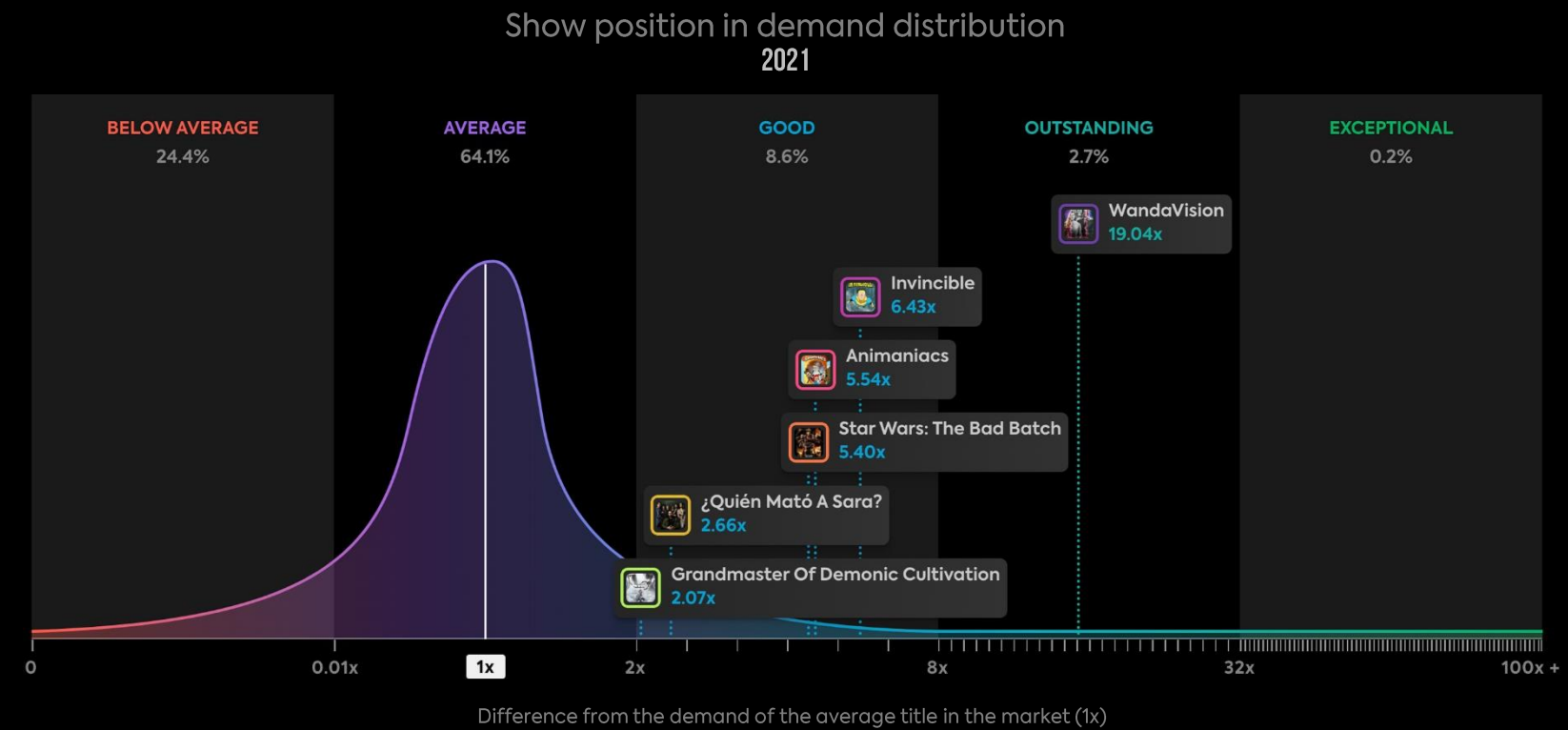
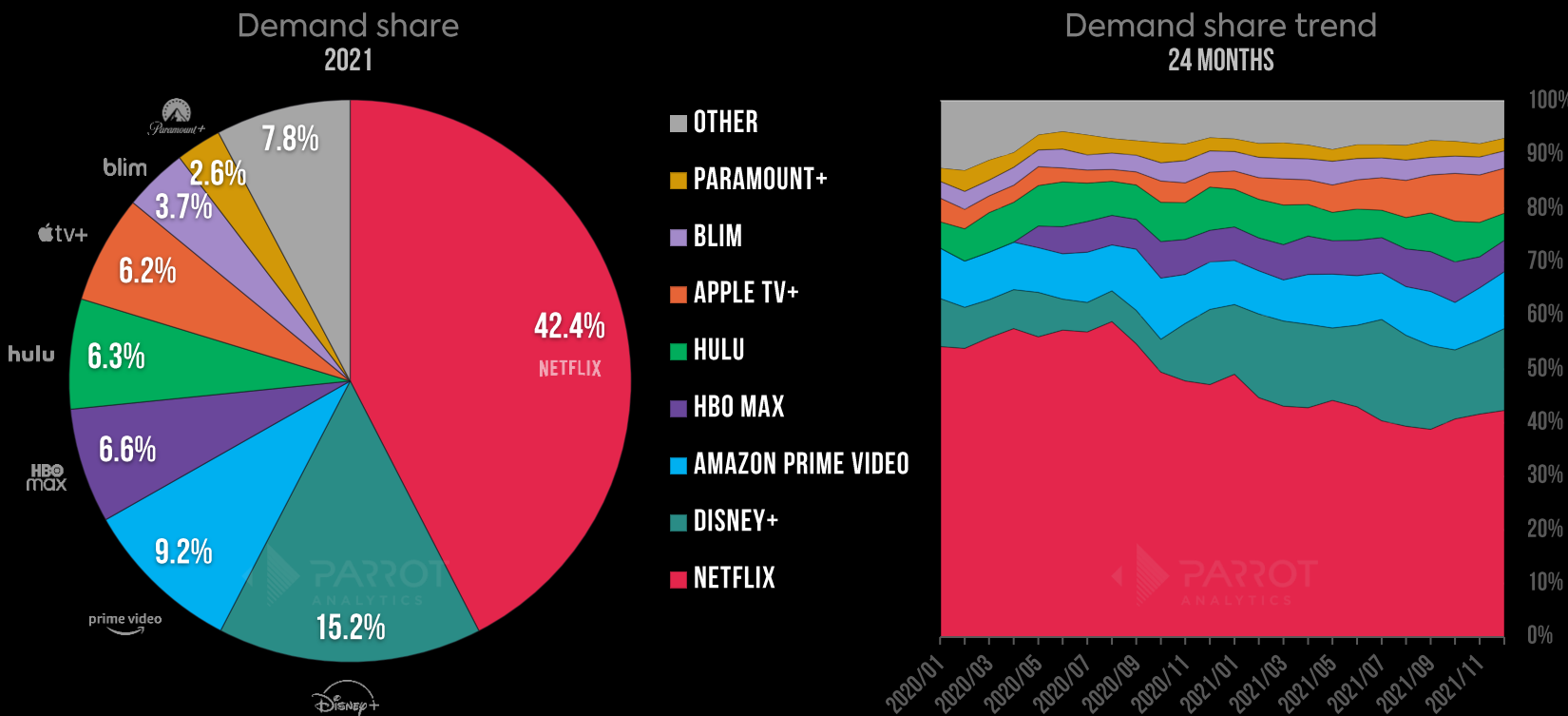
# Mexico Platform Demand Share and Digital Originals Demand Distribution

Market demand share by original platform for all digital originals

Demand distribution of a selection of top digital originals

MEXICO

MEXICO



- Mexican audiences expressed the largest share of demand for Disney+ originals out of all markets in this report. With a 15.2% demand share, it is more than double the global average for Disney+. Disney+ content has remained consistently popular in Mexico. Last year, when the platform had a 7.7% share of demand, it was still more than double Disney+'s global share of demand for the year.
- Local platform Blim has succeeded in the face of growing competition this year. It grew its demand share to 3.7% in 2021 from 3.3% in 2020.
- Paramount+ content has struggled to find fans in Mexico. The platform's 2.6% share of demand for original series in Mexico was the smallest in this report and behind even local platform, Blim.

- In both Mexico and Brazil, **WandaVision** was the most in-demand digital original of 2021. In Mexico it had 19.04 times the average series demand.
- High demand for animation in Mexico spans multiple genres. **Grandmaster of Demonic Cultivation** (anime), **Animaniacs** (cartoon), and **Invincible** (action) all ranked higher in Mexico than in any other market in this report.
- The Mexican mystery thriller, **¿Quién mató a Sara?**, had high demand in its home market where it ranked as the 47<sup>th</sup> most in-demand digital original for the year.

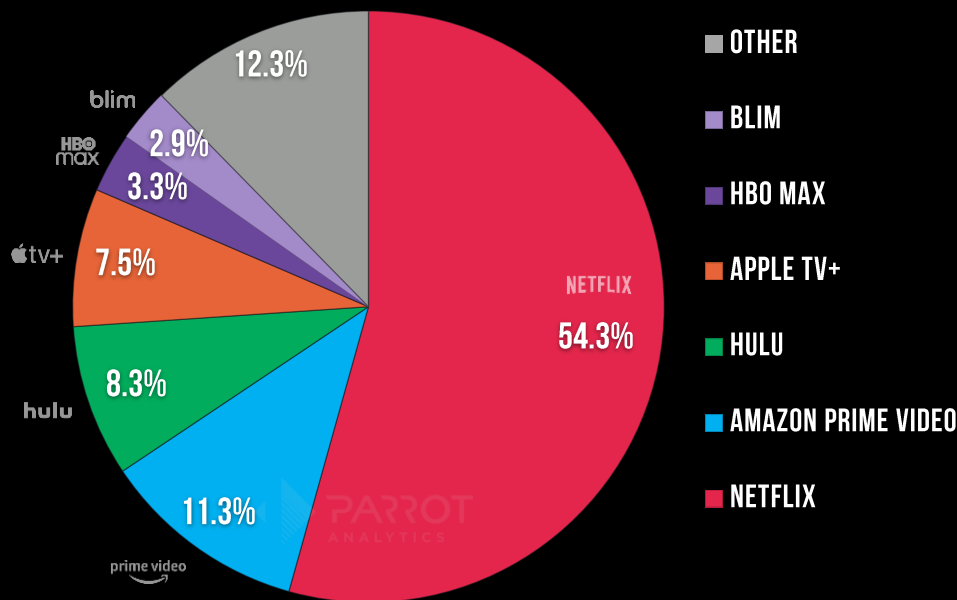


# Mexico Platform Demand Share for Drama & Action/Adventure Digital Originals

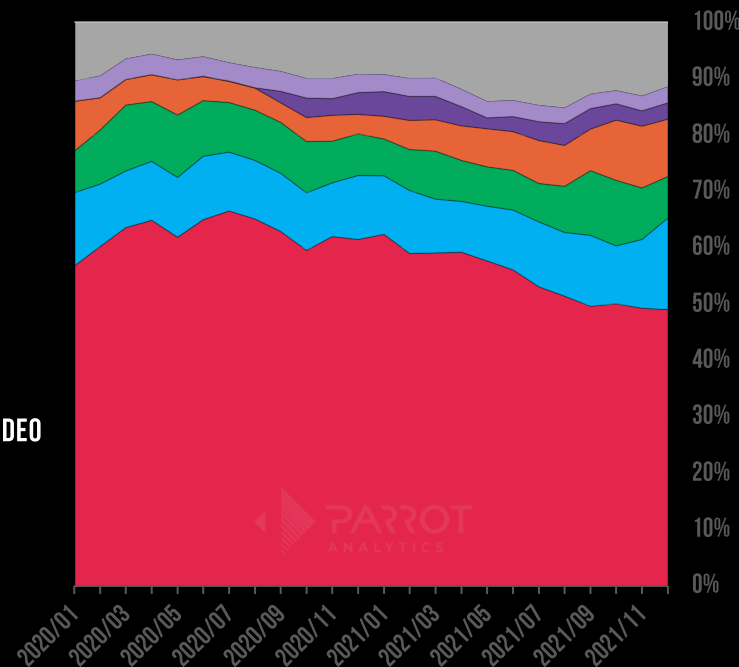
Market demand share by original platform for drama digital originals

MEXICO

Demand share for drama 2021



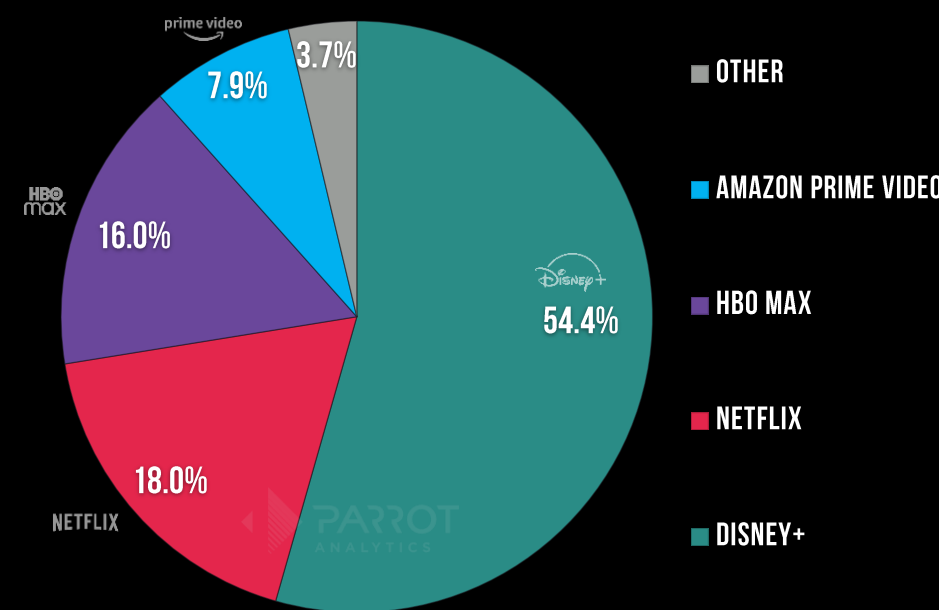
Demand share trend for drama 24 MONTHS



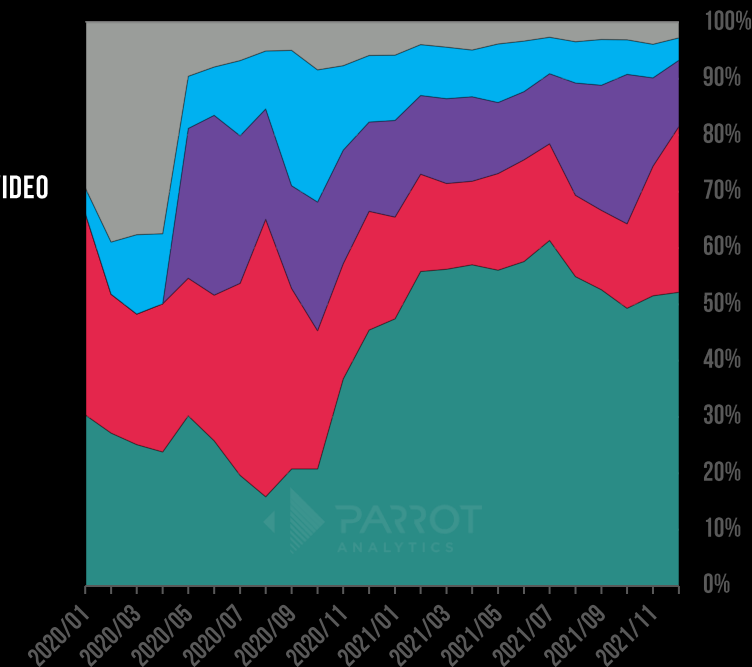
Market demand share by original platform for action/adventure digital originals

MEXICO

Demand share for action/adventure 2021



Demand share trend for action/adventure 24 MONTHS



- Netflix original dramas captured a majority of demand for original dramas in Mexico. Netflix's 54.3% of demand for dramas in Mexico was above its global share of demand for the year (51.3%).
- Amazon Prime Video saw an impressive late year surge in its share of demand for original dramas. It ended the year on a high note with 16.2% of demand for original dramas in December.
- Local platform Blim carved out a respectable 2.9% share of demand for original dramas in Mexico this year.

- Audiences in Mexico gave the largest share of attention to action/adventure originals from Disney+ this year (54.4%). Mexico was the only market in this report where action/adventure originals from Disney+ made up a majority of demand in the genre.
- Netflix has been negatively impacted the most by the success of Disney+ in Mexico. Mexico was the only market in this report where Netflix has a share of demand for action/adventure originals lower than 20%.
- A love of the superhero genre in Mexico helped propel HBO Max to a greater share of demand than Netflix for three months this year (August – October).



# Top Digital Original Series in Mexico

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

SERIES NAME	IN-MARKET PLATFORM *	ORIGINAL PLATFORM	GENRE	DIFFERENCE FROM AVERAGE TITLE (1X) IN 2021
1 <i>WandaVision</i>	Disney+	Disney+	Action and Adventure	19.0
2 <i>The Mandalorian</i>	Disney+	Disney+	Action and Adventure	16.5
3 <i>Cobra Kai</i>	Netflix	Netflix	Comedy	10.3
4 <i>Stranger Things</i>	Netflix	Netflix	Drama	9.8
5 <i>Titans</i>	Netflix	HBO Max	Action and Adventure	9.6
6 <i>The Falcon And The Winter Soldier</i>	Disney+	Disney+	Action and Adventure	8.8
7 <i>Loki</i>	Disney+	Disney+	Action and Adventure	8.7
8 <i>Narcos</i>	Netflix	Netflix	Drama	8.5
9 <i>The Boys</i>	Amazon Prime Video	Amazon Prime Video	Action and Adventure	7.3
10 <i>Arcane</i>	Netflix	Netflix	Action and Adventure	7.2
11 <i>Invincible</i>	Amazon Prime Video	Amazon Prime Video	Animation	6.4
12 <i>Ted Lasso</i>	Apple TV+	Apple TV+	Comedy	6.4
13 <i>La Casa De Papel (Money Heist)</i>	Netflix	Netflix	Drama	6.2
14 <i>Star Wars: The Clone Wars</i>	Disney+	Disney+	Children	6.0
15 <i>Animaniacs</i>	HBO Max	Hulu	Children	5.5
16 <i>Star Wars: The Bad Batch</i>	Disney+	Disney+	Drama	5.4
17 <i>The Handmaid's Tale</i>	Paramount+	Hulu	Drama	5.3
18 <i>For All Mankind</i>	Apple TV+	Apple TV+	Drama	5.2
19 <i>Lucifer</i>	Netflix	Netflix	Drama	5.1
20 <i>The Umbrella Academy</i>	Netflix	Netflix	Action and Adventure	5.1



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

22 <i>40 Y 20</i>	Blim	Blim	Comedy	4.3
23 <i>Nosotros Los Guapos</i>	Blim	Blim	Comedy	4.3
30 <i>El Juego De Las Llaves</i>	Amazon Prime Video	Amazon Prime Video	Drama	3.6
47 <i>¿Quién Mató A Sara?</i>	Netflix	Netflix	Drama	2.7
66 <i>Grandmaster Of Demonic Cultivation</i>	--	Tencent Video	Animation	2.1

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

-- No platform information available, please refer to appendix





 UNITED STATES

 AUSTRALIA

 BRAZIL

 CANADA

 FRANCE

 GERMANY

 ITALY

 MEXICO

 SPAIN

 UNITED KINGDOM

# SPAIN

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

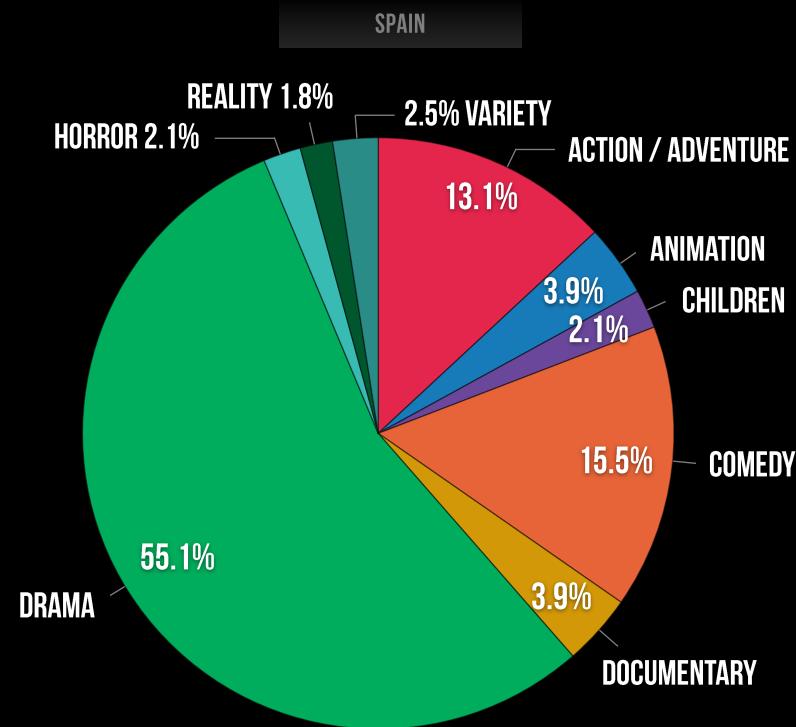


**NOTE:** The insights presented in this section are based on the entire available Parrot Analytics globalTV demand dataset, which is comprised of 3.5 trillion data points across 100+ languages in 100+ countries.

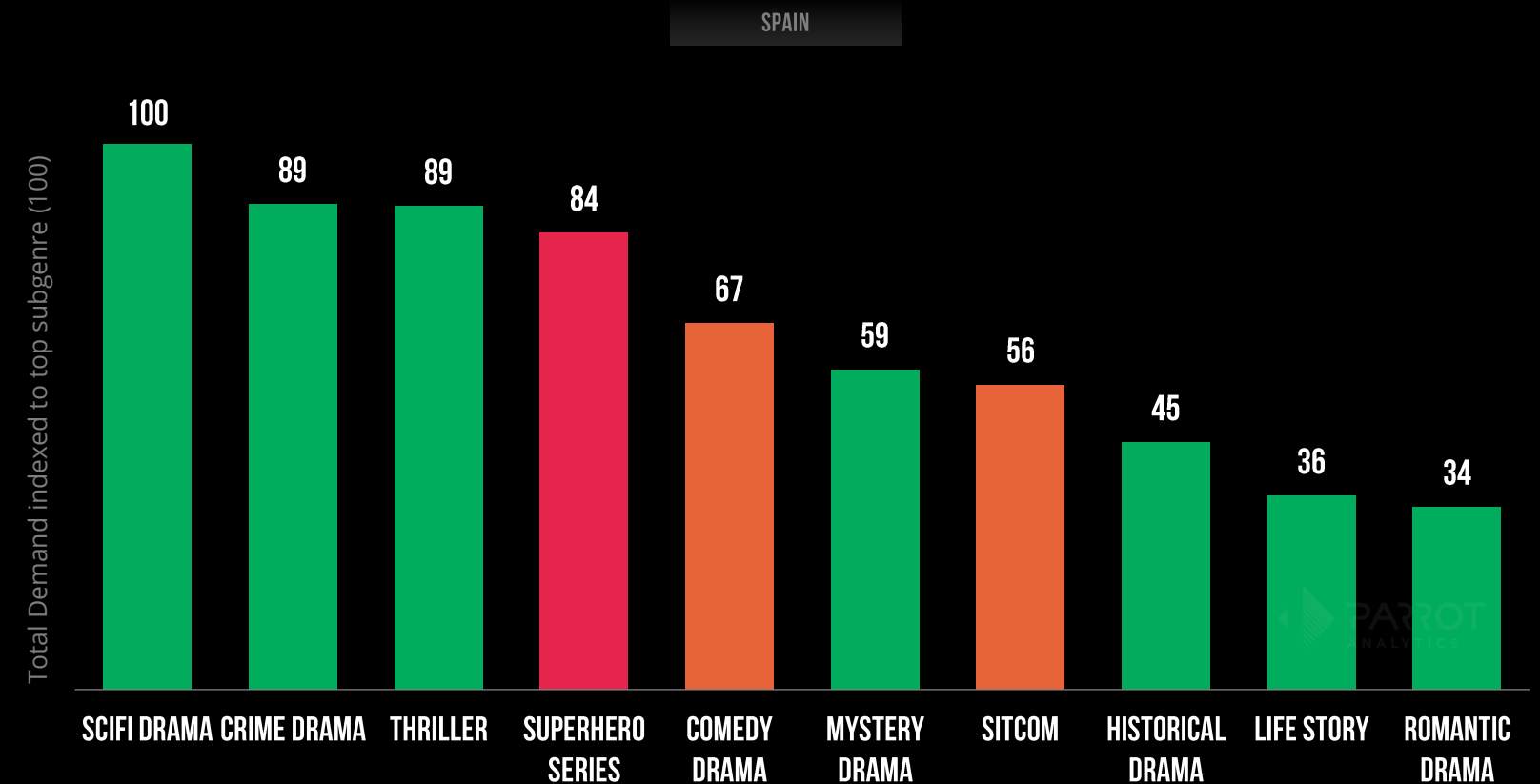


# Spain Digital Original Genre and Subgenre Preferences

Digital original series **genre** demand share in 2021



The 10 most in-demand **subgenres** for digital originals in 2021



- Spain was the most drama-loving market in this report, with a 55.1% share of demand for digital original dramas in 2021. This is well above the global share of demand for this genre – 48.3%.
- The animation and children’s genres accounted for a smaller share of demand in Spain than in any other market in this report, with a 3.9% and 2.1% demand share respectively.
- Variety is a popular genre in Spain. While the genre’s 2.5% share of demand for digital originals is not huge, it is larger than in any of the other nine markets covered in this report.

- Seven of the ten most in-demand subgenres in Spain were drama subgenres. This is a greater number than in any other market in this report, which emphasizes how Spain was the most drama-loving market.
- Superhero series performed significantly worse in Spain compared to other markets. It was the 4<sup>th</sup> most in-demand subgenre in 2021, which is by far its lowest rank among markets covered in this report.
- Crime drama was the second most in-demand subgenre in Spain in 2021. This is the subgenre’s highest rank in this report. It was helped in particular by the success of local hit, *La Casa de Papel* this year.



# Spain Platform Demand Share and Digital Originals Demand Distribution

Market demand share by original platform for all digital originals

Demand distribution of a selection of top digital originals

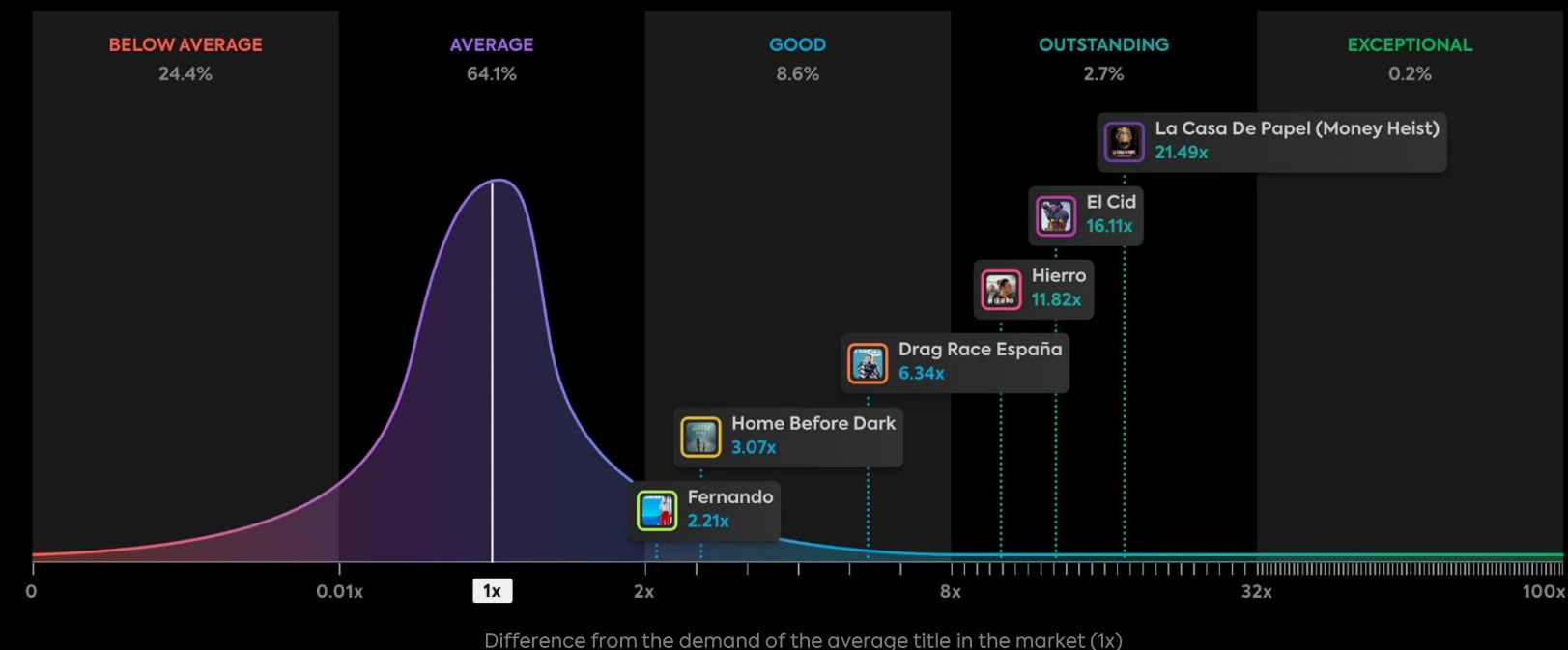
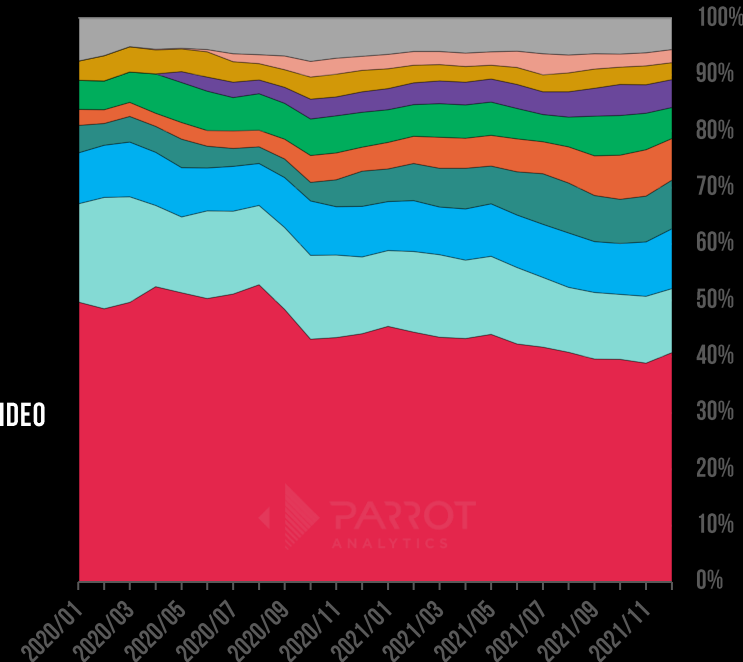
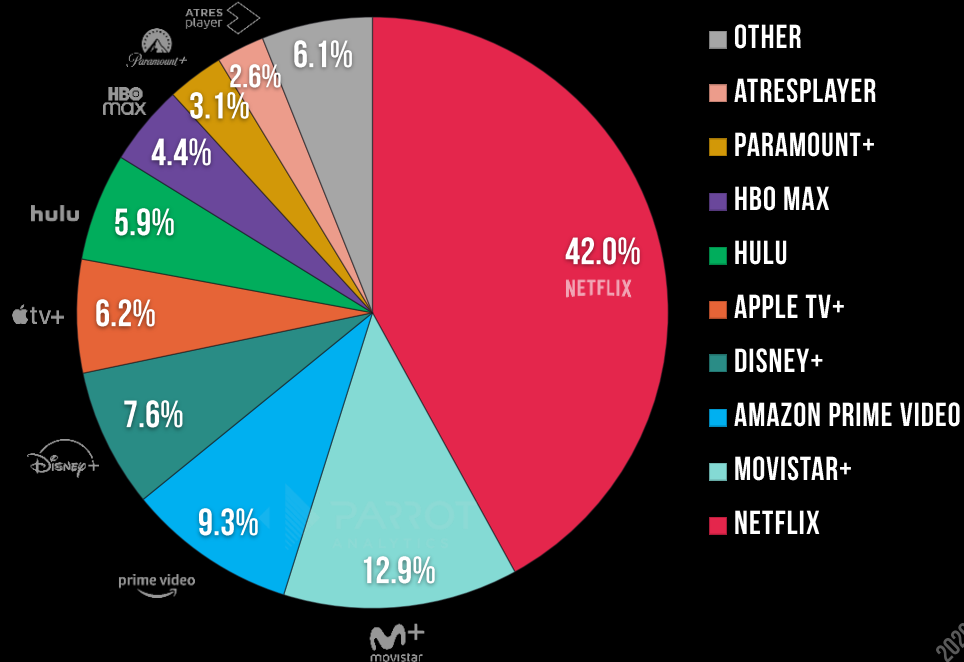
SPAIN

SPAIN

Demand share  
2021

Demand share trend  
24 MONTHS

Show position in demand distribution  
2021



- The Spanish SVOD market is unique due to the strong position of local content from Movistar+. With a 12.9% demand share in 2021 it is behind only Netflix in its home market. The platform has lost demand share over the past year to competition from other platforms. In 2020, its originals accounted for 15.4% of demand in Spain.
- A crowded competitive field has squeezed the demand share of many platforms. Hulu, Disney+, and HBO Max each have the lowest demand share in Spain of all markets in this report.
- Amazon Prime Video finished the year strong in Spain, growing its demand to 10.6% in December on the strength of its new series, *The Wheel of Time*.

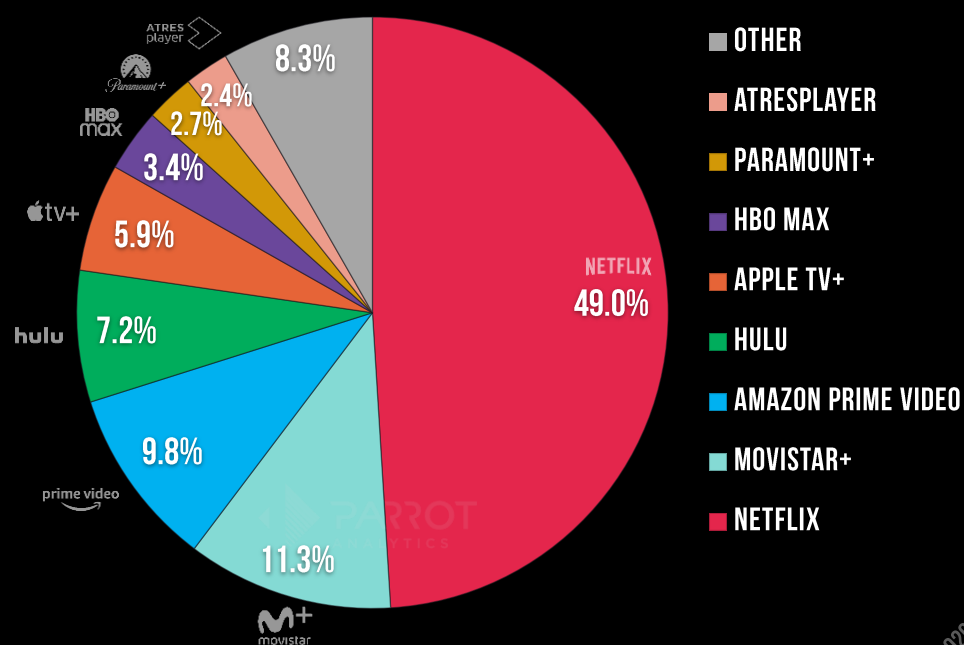
- While *La Casa de Papel*, has been a global hit for years now, it remains popular in its home market where it was the most in-demand digital original for the year with 21.49 times the average series demand.
- Two Spanish language Amazon originals have done well in Spain. *El Cid* ranked as the 5<sup>th</sup> most in demand original series this year. *Fernando*, a biographical documentary about a Spanish F1 driver has also captured audience attention in Spain.
- ATRESPlayer has had success adapting the *Drag Race* franchise for the Spanish market. *Drag Race España* had 6.34 times the average series demand for the year in Spain.

# Spain Platform Demand Share for Drama and Action/Adventure Digital Originals

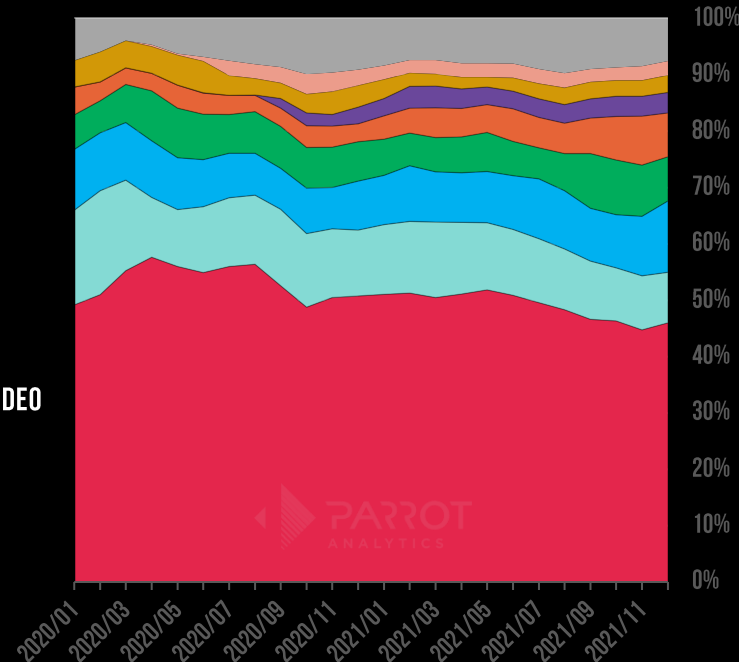
## Market demand share by original platform for drama digital originals

SPAIN

Demand share for drama  
2021



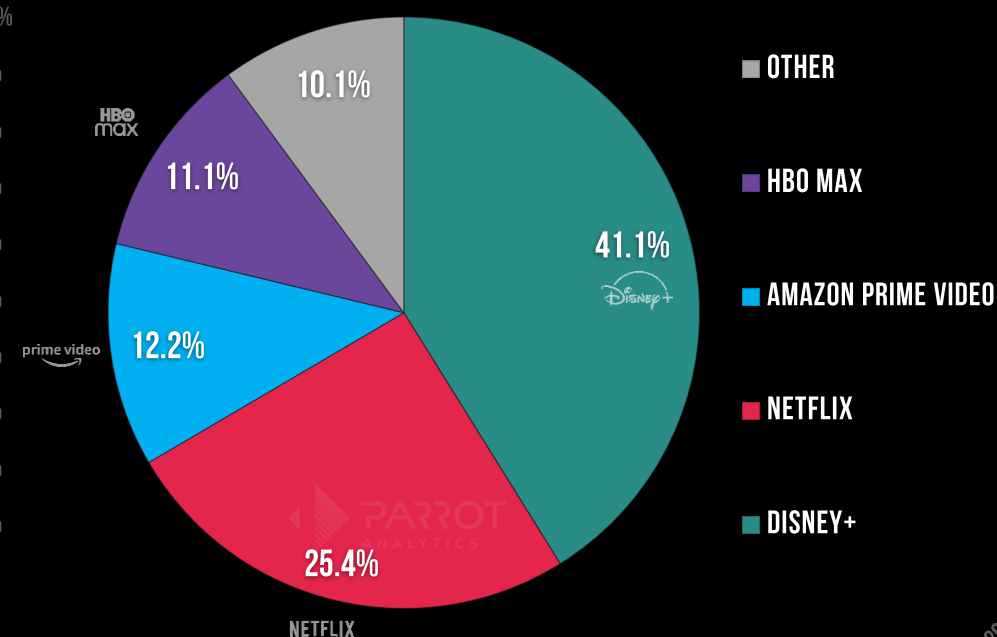
Demand share trend for drama  
24 MONTHS



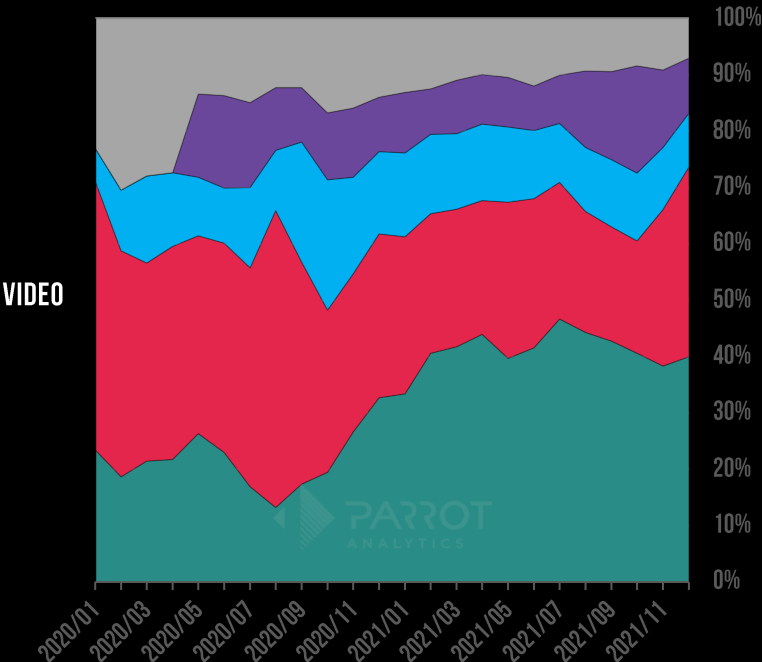
## Market demand share by original platform for action/adventure digital originals

SPAIN

Demand share for action/adventure  
2021



Demand share trend for action/adventure  
24 MONTHS



- High demand for dramas from Movistar+ in the Spanish market has increased competition here. However, the incumbency advantage of Movistar+ has been eroded this year. Its share of demand for original dramas was 11.3% in 2021, down from 13.3% in 2020.
- In particular, the demand shares of Apple TV+ and Hulu dramas have been squeezed in Spain. With a 5.9% and 7.2% share of demand respectively, these platforms had a smaller share of demand for dramas in Spain than in any other market in this report.
- Movistar+ is not the only local success story in this market. Demand for original dramas from ATRESPlayer accounted for a 2.4% share this year.

- Amazon Prime Video's action/adventure originals succeeded in Spain this year. In 2021, 12.2% of demand for action/adventure originals was for an Amazon Prime Video series – a larger share of demand for the platform's originals than in any other market in this report.
- Despite Amazon Prime Video's success in Spain, Netflix had a share of demand in the genre more than twice that of Amazon Prime Video (25.4% vs. 12.2%).
- The relatively low demand for superhero series in Spain has weighed on HBO Max, whose action/adventure originals are almost exclusively DC Universe series. The platform's 11.1% share of demand in the genre was the second smallest in this report.

# Top Digital Original Series in Spain

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

SERIES NAME	IN-MARKET PLATFORM *	ORIGINAL PLATFORM	GENRE	DIFFERENCE FROM AVERAGE TITLE (1X) IN 2021
1 <i>La Casa De Papel (Money Heist)</i>	Netflix	Netflix	Drama	21.5
2 <i>Stranger Things</i>	Netflix	Netflix	Drama	21.1
3 <i>The Mandalorian</i>	Disney+	Disney+	Action and Adventure	20.0
4 <i>WandaVision</i>	Disney+	Disney+	Action and Adventure	16.4
5 <i>El Cid</i>	Amazon Prime Video	Amazon Prime Video	Drama	16.1
6 <i>Veneno. Vida Y Muerte De Un Icono</i>	ATRESPlayer	ATRESPlayer	Drama	14.0
7 <i>Cobra Kai</i>	Netflix	Netflix	Comedy	13.3
8 <i>The Handmaid's Tale</i>	HBO Max	Hulu	Drama	13.1
9 <i>La Valla</i>	ATRESPlayer	ATRESPlayer	Drama	12.6
10 <i>The Boys</i>	Amazon Prime Video	Amazon Prime Video	Action and Adventure	12.3
11 <i>Mira Lo Que Has Hecho</i>	Movistar+	Movistar+	Comedy	11.9
12 <i>Hierro</i>	Movistar+	Movistar+	Drama	11.8
13 <i>Cable Girls</i>	Netflix	Netflix	Drama	11.8
14 <i>El Embarcadero (The Pier)</i>	Movistar+	Movistar+	Drama	11.4
15 <i>Arde Madrid</i>	Movistar+	Movistar+	Comedy	11.0
16 <i>Raised By Wolves (U.S. TV Series)</i>	HBO Max	HBO Max	Drama	10.9
17 <i>Arcane</i>	Netflix	Netflix	Action and Adventure	10.7
18 <i>Bridgerton</i>	Netflix	Netflix	Drama	10.6
19 <i>Late Motiv</i>	Movistar+	Movistar+	Variety	10.2
20 <i>La Resistencia</i>	Movistar+	Movistar+	Variety	10.1

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

21 <i>#Luimelia</i>	ATRESPlayer	ATRESPlayer	Comedy	9.9
44 <i>Drag Race España</i>	ATRESPlayer	ATRESPlayer	Reality	6.3
88 <i>Home Before Dark</i>	Apple TV+	Apple TV+	Drama	3.1
116 <i>Vida Perfecta</i>	Movistar+	Movistar+	Comedy	2.3
125 <i>Fernando</i>	Amazon Prime Video	Amazon Prime Video	Documentary	2.2

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

-- No platform information available, please refer to appendix

GLOBAL **TV DEMAND** AWARDS™**Money Heist is “like an American action heist and Latin telenovela”****Enrique Arce**

“Arturo Román”

LA CASA DE PAPEL | NETFLIX

**Alejandro Rojas**

Director of Applied Analytics



Enrique Arce, better known to millions around the world as the antagonistic “Arturo Roman” in Netflix’s *Money Heist*, reveals the “powerful combination” of genres that make up the award-winning Spanish series.

Parrot Analytics’ VP of Applied Analytics Alejandro Rojas discusses with Enrique the “pinch-me” moments throughout the five-season journey of the show from relatively unknown local production to global streaming sensation.

**WATCH NOW**



UNITED STATES



AUSTRALIA



BRAZIL



CANADA



FRANCE



GERMANY



ITALY



MEXICO



SPAIN



UNITED KINGDOM

# 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.

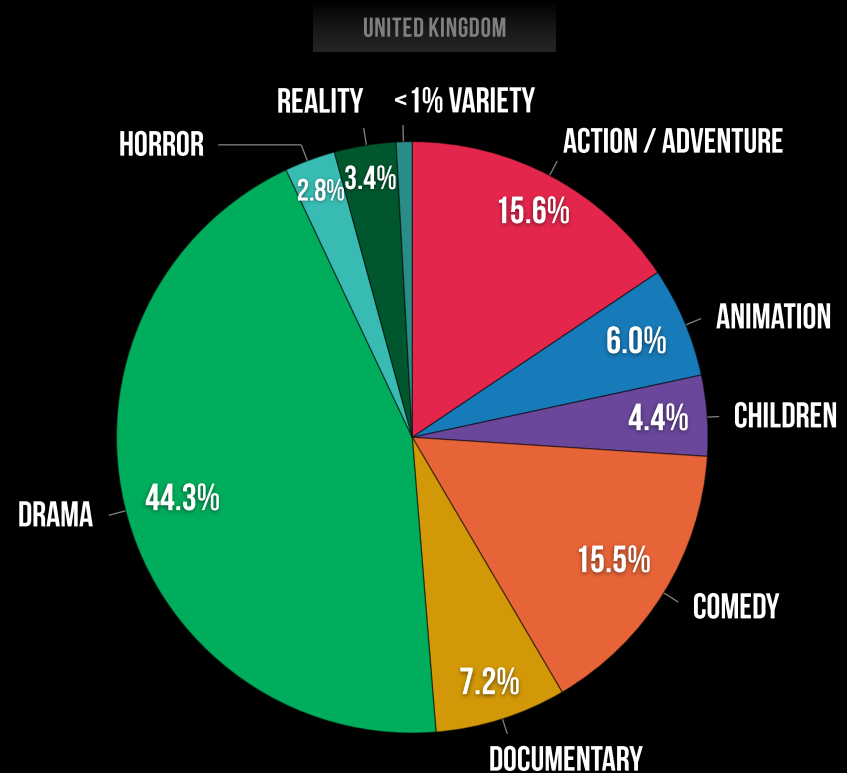


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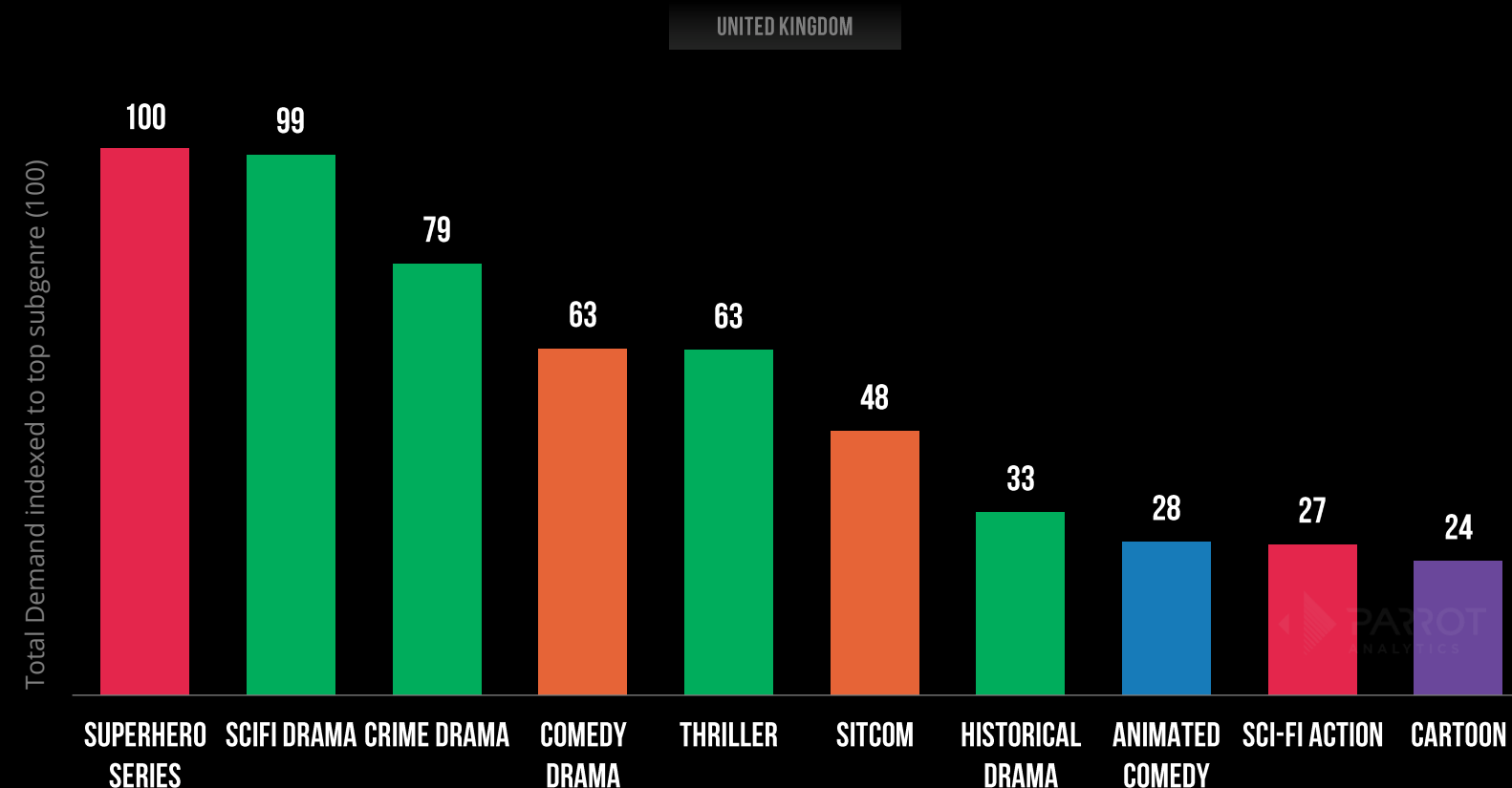


# United Kingdom Digital Original Genre and Subgenre Preferences

Digital original series **genre** demand share in 2021



The 10 most in-demand **subgenres** for digital originals in 2021



- In this report, the UK had the second highest demand share for documentary digital originals with 7.2%. This is an increase from its 6.3% share in 2020.
- The UK is among the most receptive markets for horror content. Horror’s 2.8% demand share here is greater than the US but behind the most horror-loving markets, Brazil and Canada.
- The share of demand for animated digital originals in the UK (6.0%) was the third smallest in this report and below the global share of demand for the genre (6.2%).

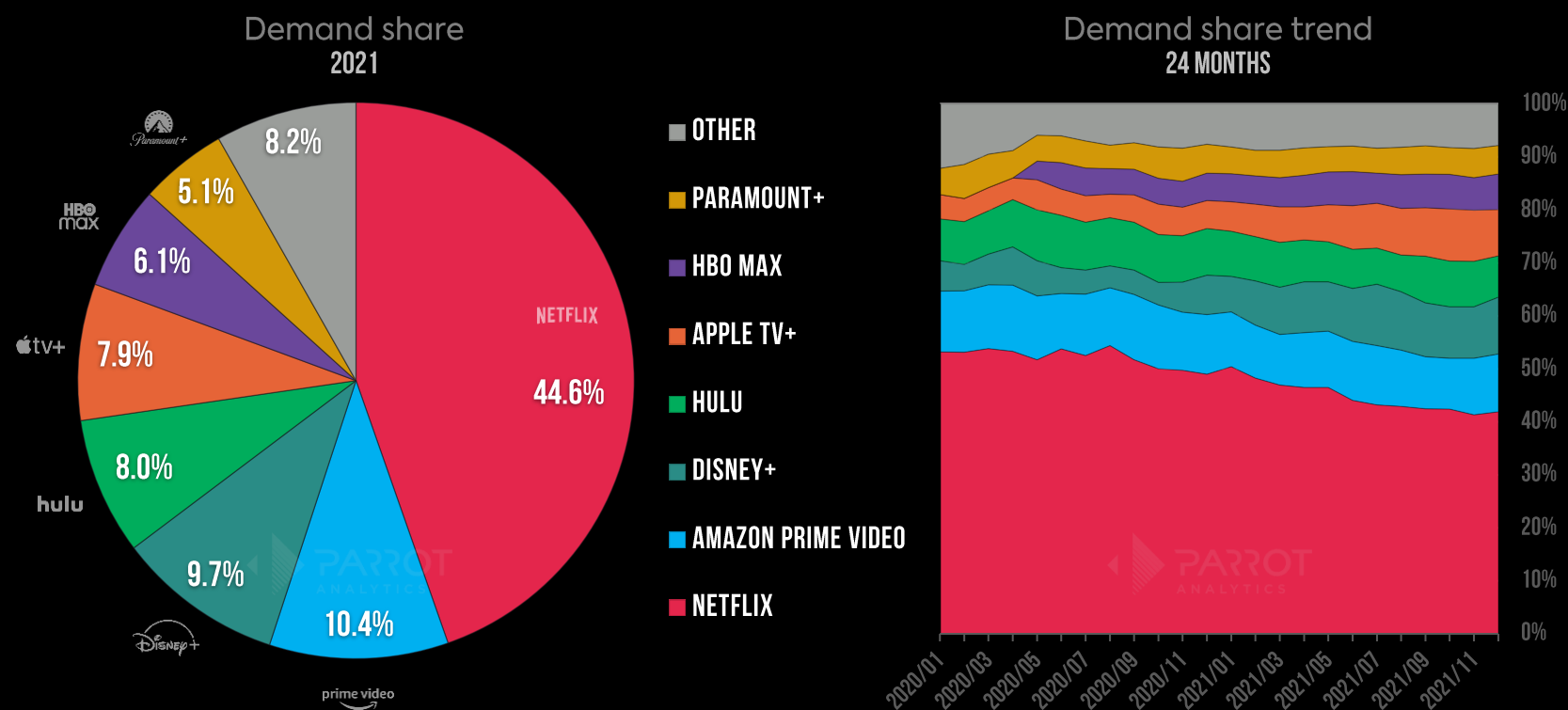
- Among European markets in this report, the UK was the only one where superhero series outranked sci-fi drama as the most in-demand subgenre of the year. It just barely achieved this in the UK however – demand for sci-fi drama was only 1% lower than superhero series in 2021.
- Historical dramas succeeded in the UK this year. It achieved its highest rank as the 7<sup>th</sup> most in-demand subgenre in the UK, Italy, and France.
- The UK was one of four markets in this report where cartoon ranked in the ten most in-demand subgenres of 2021.



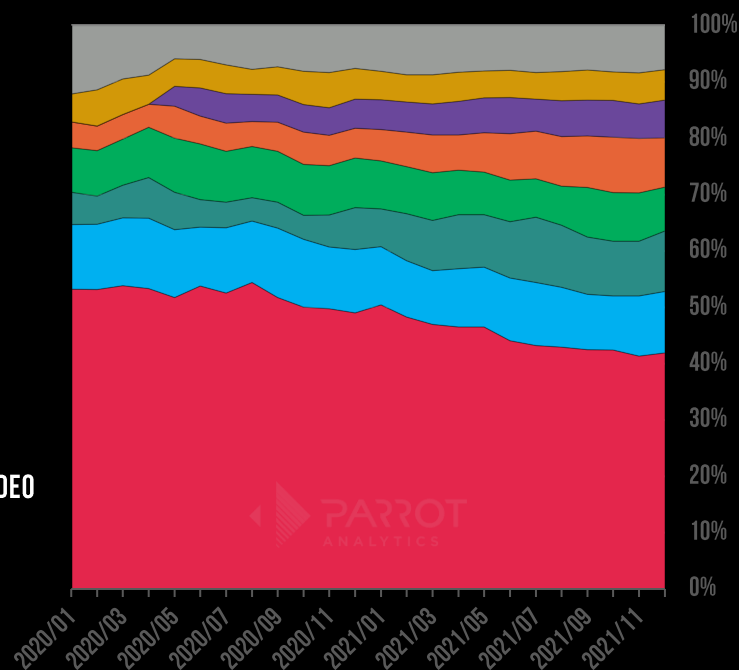
# United Kingdom Platform Demand Share & Digital Originals Demand Distribution

Market demand share by original platform for all digital originals

UNITED KINGDOM



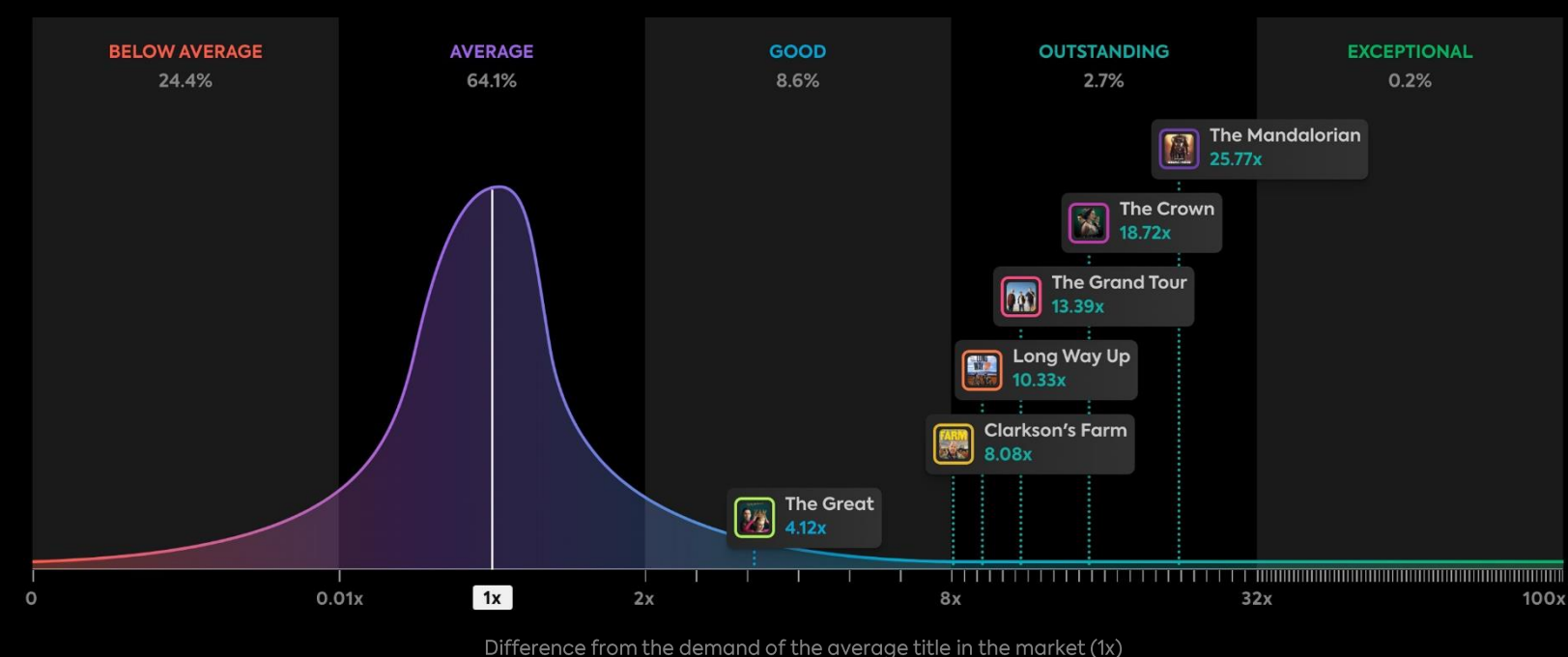
Demand share trend 24 MONTHS



Demand distribution of a selection of top digital originals

UNITED KINGDOM

Show position in demand distribution 2021



- The United Kingdom was one of four markets in this report where Amazon Prime Video had a greater than 10% share of demand for its original series in 2021.
- Hulu's 8% share of demand in the UK was well above its global share of demand (5.8%) but it shrank noticeably at the end of the year, ending at 7.8% in December.
- Apple TV+ had a successful year in the UK with a 7.9% share of digital original demand for the year. In fact, in October it reached a 9.8% share of demand putting it behind only Netflix.

- **The Mandalorian** is the most in-demand digital original series in the United Kingdom for 2021. It had 25.77 times the average series demand, which is down from its demand in 2020 (31.6x).
- Apple TV+'s **Long Way Up** performed better in the UK than any other market in this report. It ranked as the 20<sup>th</sup> most in-demand digital original which is an improvement from last year when it ranked #30.
- Amazon Prime Video's **Clarkson's Farm** premiered in June 2021 and has been a hit in the UK where it reached 8.08 times the average series demand. It likely benefitted from the popularity of its star, Jeremy Clarkson, who is also the host of **The Grand Tour** (the 14<sup>th</sup> most in-demand original series in the UK this year).



# United Kingdom Platform Demand Share For Drama and Action/Adventure Digital Originals

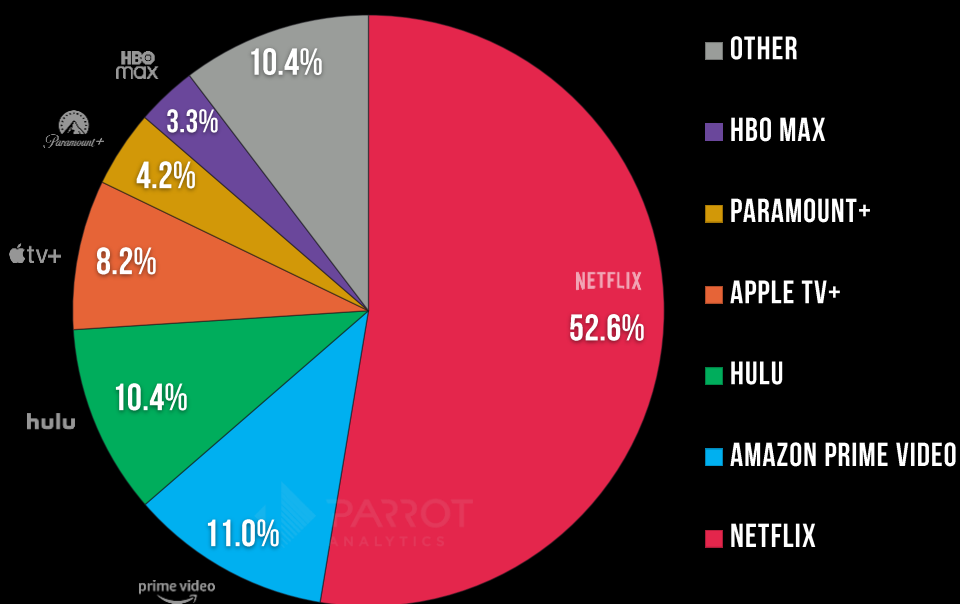
Market demand share by original platform for drama digital originals

UNITED KINGDOM

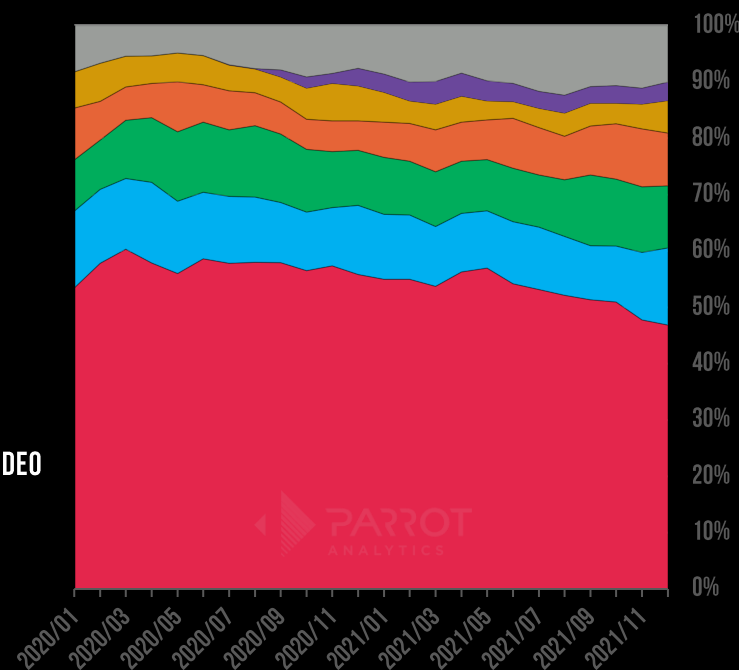
Market demand share by original platform for action/adventure digital originals

UNITED KINGDOM

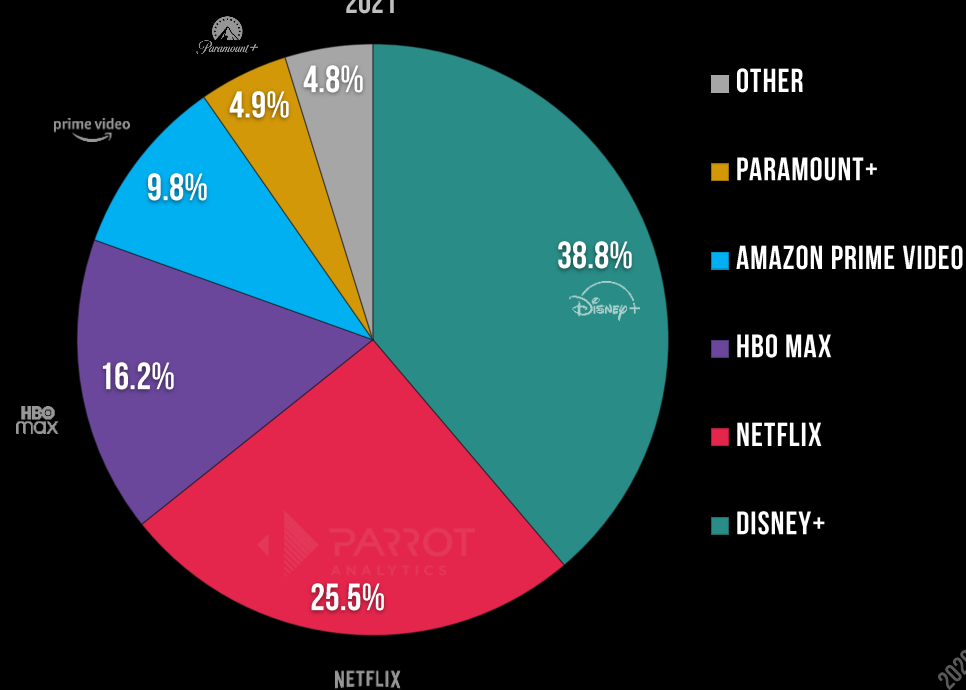
Demand share for drama 2021



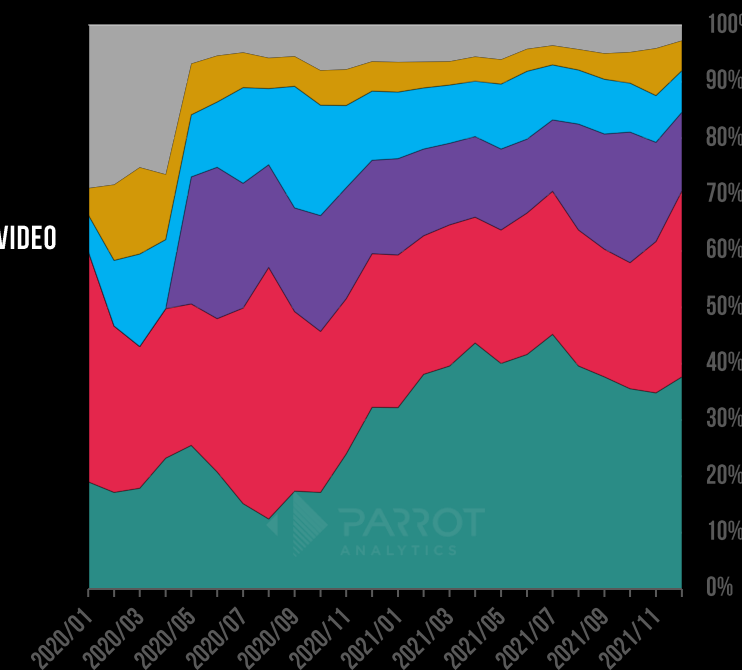
Demand share trend for drama 24 MONTHS



Demand share for action/adventure 2021



Demand share trend for action/adventure 24 MONTHS



- The UK was one of the five markets in this report where Netflix accounted for a larger share of demand for drama originals (52.6%) than its global share of demand for dramas (51.3%).
- Paramount+ original dramas accounted for 4.2% of demand for digital original dramas in the UK this year. This is well above the platform's 2.7% global share of demand for dramas.
- Amazon Prime Video saw its largest share of demand for original dramas in the past 2 years in December 2021 when its original dramas accounted for 13.7% of demand for all digital original dramas. This was driven by high demand for its hugely successful new series, *The Wheel of Time*.

- Paramount+ has a larger share of demand in the UK for its action/adventure originals than it does globally (4.9% vs 3.0%). In November, its demand share (8.4%) exceeded Amazon Prime Video's (8.3%).
- While Netflix saw a late-year surge in its demand share, at no point in 2021 did it have a larger demand share than Disney in the action/adventure genre.
- The share of demand in the UK for Disney+ originals peaked in July 2021 when it accounted for 45.2% of demand for all action/adventure originals.





# Top Digital Original Series in the United Kingdom

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

SERIES NAME	IN-MARKET PLATFORM *	ORIGINAL PLATFORM	GENRE	DIFFERENCE FROM AVERAGE TITLE (1X) IN 2021
1 <i>The Mandalorian</i>	Disney+	Disney+	Action and Adventure	25.8
2 <i>Stranger Things</i>	Netflix	Netflix	Drama	23.3
3 <i>WandaVision</i>	Disney+	Disney+	Action and Adventure	23.0
4 <i>The Crown</i>	Netflix	Netflix	Drama	18.7
5 <i>The Handmaid's Tale</i>	Amazon Prime Video	Hulu	Drama	17.9
6 <i>Ted Lasso</i>	Apple TV+	Apple TV+	Comedy	16.3
7 <i>Cobra Kai</i>	Netflix	Netflix	Comedy	15.9
8 <i>Lucifer</i>	Netflix	Netflix	Drama	14.6
9 <i>The Falcon And The Winter Soldier</i>	Disney+	Disney+	Action and Adventure	14.5
10 <i>The Witcher</i>	Netflix	Netflix	Action and Adventure	14.2
11 <i>The Expanse</i>	Amazon Prime Video	Amazon Prime Video	Drama	13.8
12 <i>Loki</i>	Disney+	Disney+	Action and Adventure	13.8
13 <i>The Boys</i>	Amazon Prime Video	Amazon Prime Video	Action and Adventure	13.4
14 <i>The Grand Tour</i>	Amazon Prime Video	Amazon Prime Video	Sports	13.4
15 <i>Titans</i>	Netflix	HBO Max	Action and Adventure	12.2
16 <i>Black Mirror</i>	Netflix	Netflix	Drama	12.1
17 <i>Arcane</i>	Netflix	Netflix	Action and Adventure	11.7
18 <i>Star Wars: The Clone Wars</i>	Disney+	Disney+	Children	11.6
19 <i>Star Trek: Discovery</i>	Virgin TV Go	Paramount+	Drama	11.5
20 <i>Long Way Up</i>	Apple TV+	Apple TV+	Documentary	10.3

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

35 <i>Clarkson's Farm</i>	Amazon Prime Video	Amazon Prime Video	Reality	8.1
65 <i>All Or Nothing: Tottenham Hotspur</i>	Amazon Prime Video	Amazon Prime Video	Documentary	5.7
86 <i>Jack Whitehall: Travels With My Father</i>	Netflix	Netflix	Comedy	4.3
91 <i>Formula 1: Drive To Survive</i>	Netflix	Netflix	Documentary	4.2
92 <i>The Great</i>	Starzplay	Hulu	Drama	4.1

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

-- No platform information available, please refer to appendix

# THE GLOBAL DEMAND MEASUREMENT STANDARD

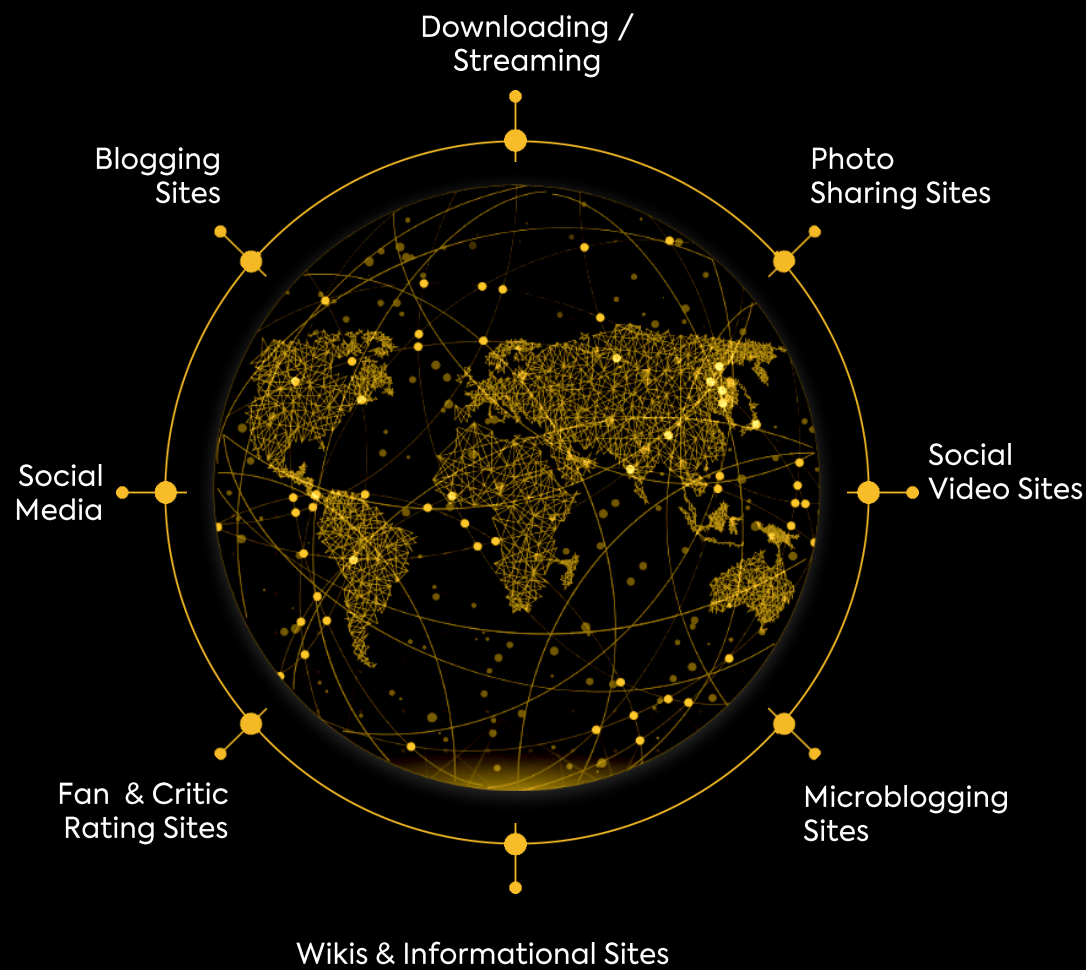
Gain an understanding of Parrot Analytics' global demand measurement capabilities, how we define a "digital original" and how it is possible that content can generate demand in markets where a title or platform is not yet available.

# The Standard for Global Audience Demand Measurement

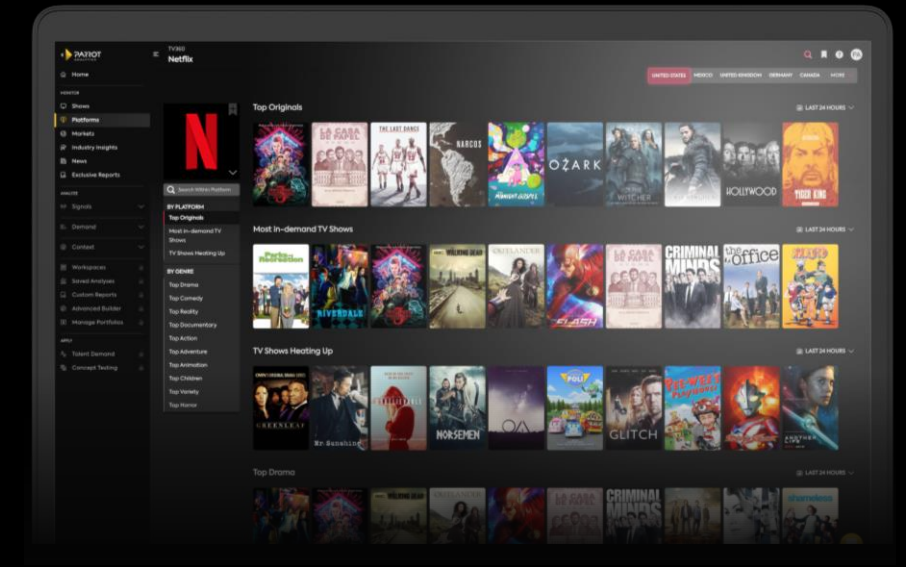
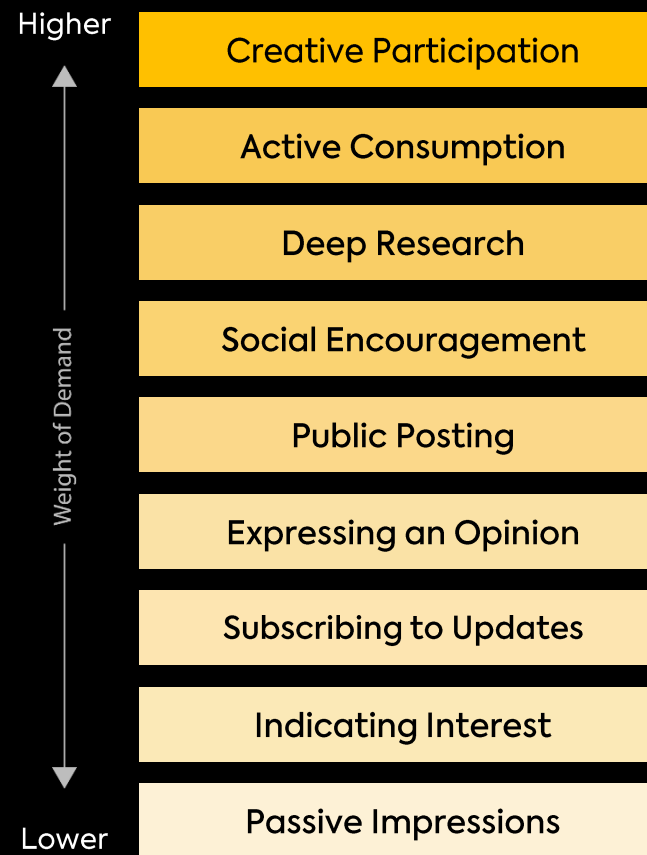
We capture the world's largest audience behavior datasets

We clean, enrich, combine and analyze the data

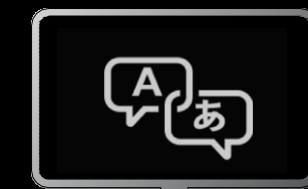
We provide the world's only global audience demand measurement system



Demand System:



Across platforms



In all languages



In all markets

## 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 Paramount+, 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 Paramount+ to be the original (streaming) platform, not Netflix, in all markets.

### We exclude licensed originals and licensed series

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

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



# Methodology for Demand Attribution to the Original Platform

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

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

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

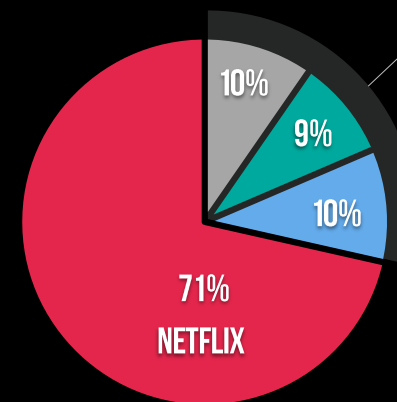
Because our global demand measurement system incorporates multiple country-specific content demand signals, we are able to gauge popularity for TV content long before a series, or platform, is officially released in its home market, or any other market.

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

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

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

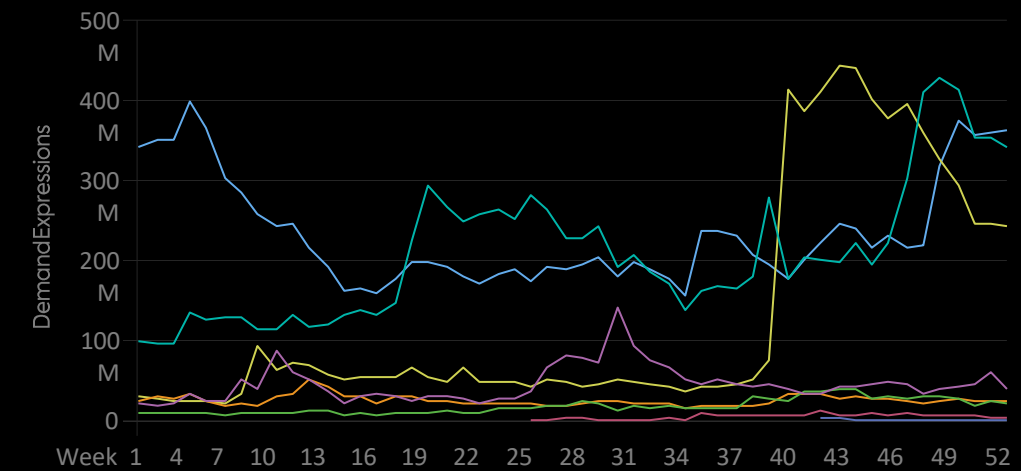
Total share of demand for platforms in 2017



OTHER PLATFORMS  
(CBS All Access, Crackle, Facebook, Apple Music, Seeso, YoutubeRed)



Total platform demand in 2017 (ex. Netflix)



# The Global Audience Demand Measurement Standard

The world's largest studios, networks and OTT platforms apply our 360-degree view of content, talent and audiences to optimize monetization decisions. Partner with Parrot Analytics to understand how to harness demand measurement to compete and thrive in the global attention economy.

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