Understanding global demand for TV content: Making sense of the fragmented world
Increasing platform proliferation

Increasing audience fragmentation

Less effective measurement across the globe
The Measurement Problem

Surveys and panel-based measurement are no longer sufficient to provide the global, cross-platform view of consumer demand for content.
Global Content Demand

- Real-Time
- Cross-Platform
- Country-Specific
Global Content Demand

- Real-Time
- Cross-Platform
- Country-Specific

- Social Media
- Blogging Sites
- File Sharing / P2P Platforms
- Photo Sharing Sites
- Video Streaming Sites
- Micro Blogging Sites
- Wikis & Informational Sites
- Fan & Critic Rating Sites
Industry-first: **DemandRank™**

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

- Lower
  - **Demand**

---

- **File Sharing / P2P Platforms**
  - File Sharing Sites
  - Photo Sharing Sites

- **Social Media**
  - Blogging Sites
  - Photo Sharing Sites

- **Fan & Critic Rating Sites**
  - Video Streaming Sites
  - Micro Blogging Sites

- **Wikis & Informational Sites**
A UNIVERSE OF DEMAND DATA

1,250,000,000+
DAILY EXPRESSIONS
Global Demand Measurement System

*Demand Expressions™*
An absolute measure of demand *within a market*.

<table>
<thead>
<tr>
<th>France</th>
<th>November 6, 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Westworld</td>
<td>5,396,974</td>
</tr>
<tr>
<td>Orange is The New Black</td>
<td>3,069,145</td>
</tr>
<tr>
<td>Quantico</td>
<td>1,201,531</td>
</tr>
<tr>
<td>The Daily Show with Trevor Noah</td>
<td>334,044</td>
</tr>
<tr>
<td>Days of Our Lives</td>
<td>73,259</td>
</tr>
</tbody>
</table>

*Demand Rating™*
A relative measure of demand *across markets*.

<table>
<thead>
<tr>
<th>The Crown</th>
<th>November 6, 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>United Kingdom</td>
<td>88.06</td>
</tr>
<tr>
<td>Canada</td>
<td>82.91</td>
</tr>
<tr>
<td>Italy</td>
<td>77.94</td>
</tr>
<tr>
<td>New Zealand</td>
<td>75.15</td>
</tr>
<tr>
<td>China</td>
<td>54.74</td>
</tr>
</tbody>
</table>

Maximum Demand in 2016
What shows had the highest peak demand in 2016?

US:
1. Game of Thrones
2. The Walking Dead
3. Stranger Things
4. Mr. Robot
5. Pretty Little Liars

FR:
1. Game of Thrones
2. Orange is the New Black
3. The Walking Dead
4. American Horror Story
5. Quantico

CN:
1. Game of Thrones
2. The Walking Dead
3. Westworld
4. House of Cards
5. Sherlock

BR:
1. Game of Thrones
2. The Walking Dead
4. American Idol
5. American Horror Story

NZ:
1. Game of Thrones
2. The Walking Dead
3. Stranger Things
5. Sherlock
Top Shows Change Over Time

June
1. The Walking Dead
2. Game of Thrones
3. Pretty Little Liars
4. Orange is The New Black
5. Westworld

July
2. Stranger Things
3. Suits
4. Wentworth
5. Mr. Robot

August
4. American Horror Story

September
4. Wentworth
5. Mr. Robot

October
5. American Horror Story
Dark and mysterious titles on top in LATAM

<table>
<thead>
<tr>
<th>Title</th>
<th>Demand Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Game Of Thrones</td>
<td>-18%</td>
</tr>
<tr>
<td>The Walking Dead</td>
<td>-24%</td>
</tr>
<tr>
<td>Pretty Little Liars</td>
<td>-59%</td>
</tr>
<tr>
<td>Stranger Things</td>
<td>-60%</td>
</tr>
<tr>
<td>American Horror Story</td>
<td></td>
</tr>
</tbody>
</table>

Average Demand in 2016
What are the top digital original series?

Demand for Digital Original Series in Canada

Netflix  Hulu  Yahoo!  Amazon Video

Average Demand Expressions™ in 2016
Understanding pre-release demand

Demand for Digital Original Series in China

<table>
<thead>
<tr>
<th>Top Shows</th>
<th>Average Demand</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marvel's Luke Cage</td>
<td><strong>NETFLIX</strong></td>
</tr>
<tr>
<td>StartUp</td>
<td><strong>CRACKLE</strong></td>
</tr>
<tr>
<td>Transparent</td>
<td><strong>amazon</strong></td>
</tr>
<tr>
<td>The Mindy Project</td>
<td><strong>hulu</strong></td>
</tr>
<tr>
<td>Prank Academy</td>
<td><strong>YouTube Red</strong></td>
</tr>
</tbody>
</table>

Average Demand in 2016

Average Demand Expressions™

0 2 Million 4 M 6 M 8 M

CN
Which studios have the largest demand share?

Share of Demand Between Major Studios in Argentina

- **2016 Market Share**
  - 28% Warner Bros. Television
  - 19% 20th Century Fox Television
  - 15% ABC Studios
  - 13% Home Box Office (HBO)
  - 7% Universal Television
  - 7% Sony Pictures Television
  - 7% CBS Television Studios
  - 4% Lionsgate Television

Sum of Demand Expressions™ in 2016
Demand for ShondaLand titles globally

Shonda Rhimes Titles

Average Demand in 2016
Most in-demand ShondaLand title by market

Share of Markets for Each #1 Title

88% Grey’s Anatomy

10% Scandal

2% How To Get Away With Murder

#1 Title

SHONDALAND

Average Demand in 2016
How do people interact with content?

Demand Breakdown by ‘Expression Platforms’ in the UK

- **Game of Thrones**
  - 43% File Sharing
  - 28% Social Media

- **The Walking Dead**
  - 71% Social Media
  - 24% Other

- **Marvel’s Luke Cage**
  - 71% File Sharing
  - 1% Social Media
  - 29% Other

Share of Demand | October 24, 2016
Regional differences in content popularity

**Over-Indexing Genres**
- Animation
- Variety
- Reality
- Drama
- Children
- Horror
- Action & Adventure
- Comedy
- Reality
- Action & Adventure
- Variety
- Drama
- Horror

**NORTH AMERICA**
- Horror
- Action & Adventure
- Children
- Comedy
- Drama
- Variety
- Comedy
- Animation
- Reality

**LATIN AMERICA**
- Children
- Animation
- Horror
- Drama

**ASIA**
- Children
- Action & Adventure
- Variety
- Comedy
- Reality
- Animation

**EUROPE**
- Children
- Action & Adventure
- Variety
- Comedy
- Reality
- Animation

Share of Demand in 2016
Regional differences in content popularity

Share of Demand in 2016
Crime-related dramas most popular in Denmark

Demand Share by Genre

- Drama: 46.74%
- Comedy: 14.51%
- Reality: 13.69%
- Children: 6.68%
- Action and Adventure: 6.18%
- Animation: 4.54%
- Variety: 3.19%
- Horror: 1.96%
- Sports: 1.42%
- Documentary: 1.02%
- Factual: 0.05%

Top 5 Drama Sub-Genres
- Crime
- Fantasy
- Procedural
- Science Fiction
- Teen

Share of Demand in 2016
Dramas skew older than Comedies

**Comedy**
- Female: 65+ to 15-17
- Male: 65+ to 15-17

**Drama**
- Female: 65+ to 15-17
- Male: 65+ to 15-17

Share of Demand in 2016
How does demand evolve?
How does demand evolve?

Episodic releases

Game of Thrones
The Walking Dead

TWD: Season 6
GOT: Season 6
TWD: Season 7

Demand Expressions™ | January 01 - October 30, 2016
How does demand evolve?

- **NEW TITLES**
  - Fuller House
  - Jessica Jones
  - Stranger Things

- **RETURNING TITLES**
  - Daredevil
  - House of Cards
  - Orange is the New Black

**Season releases**

**Demand Expressions™**
What affects demand?
What affects demand?

68th Primetime Emmy Awards

Major awards

Winning Series
- Game of Thrones
- Veep
- The People v. O.J. Simpson
- The Voice
- Key & Peele
- Last Week Tonight With John Oliver

Demand Expressions™ | September 11–25, 2016
What affects demand?

Major awards

Baskets

686% overnight
108% long-term

Titles with Winning Actors, Writers, or Directors

<table>
<thead>
<tr>
<th>Title</th>
<th>Average Demand Expressions™</th>
<th>Immediate Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mr. Robot</td>
<td>29%</td>
<td></td>
</tr>
<tr>
<td>Downton Abbey</td>
<td>6%</td>
<td></td>
</tr>
<tr>
<td>Orphan Black</td>
<td>251%</td>
<td></td>
</tr>
<tr>
<td>Saturday Night Live</td>
<td>73%</td>
<td></td>
</tr>
<tr>
<td>Bloodline</td>
<td>98%</td>
<td></td>
</tr>
<tr>
<td>The Night Manager</td>
<td>259%</td>
<td></td>
</tr>
<tr>
<td>American Crime</td>
<td>115%</td>
<td></td>
</tr>
<tr>
<td>Baskets</td>
<td>686%</td>
<td></td>
</tr>
<tr>
<td>Transparent</td>
<td>403%</td>
<td></td>
</tr>
<tr>
<td>Master Of None</td>
<td>380%</td>
<td></td>
</tr>
</tbody>
</table>
What affects demand?

Related Properties

Pokémon

Demand Expressions™ | June 25 - July 26, 2016
International Titles Can Also Find Global Popularity

Attack on Titan

Japan

Average Demand in 2016
International Titles Can Also Find Global Popularity

La Que Se Avecina
Spain

Average Demand in 2016
Around the World in 60 seconds
Mexico

Casual

87,218

Average Demand Expressions™ in 2016

Wrecked

186,500

Average Demand Expressions™ in 2016

2.1x
MORE DEMAND
Russia

1.5x
MORE DEMAND

Colony
1,475,010
Average Demand Expressions™ in 2016

The Expanse
2,225,985
Average Demand Expressions™ in 2016
Germany

Orange is the New Black
1,780,591
Average Demand Expressions™ in 2016

House of Cards
2,315,106
Average Demand Expressions™ in 2016
Thailand

StartUp

325,895

Average Demand Expressions™ in 2016

2.6x

MORE DEMAND

Silicon Valley

859,794

Average Demand Expressions™ in 2016
South Korea

The Magicians

356,075
Average Demand Expressions™ in 2016

The Shannara Chronicles

434,750
Average Demand Expressions™ in 2016
Italy

Survivor: 25,980
The Amazing Race: 36,588

Average Demand Expressions™ in 2016

1.4x MORE DEMAND
India

MORE DEMAND

Supernatural
33,643,588
Average Demand Expressions™ in 2016

Teen Wolf
46,337,980
Average Demand Expressions™ in 2016
Poland

1.8x MORE DEMAND

Sanjay and Craig
77,936
Average Demand Expressions™ in 2016

The Loud House
143,588
Average Demand Expressions™ in 2016
Chile

Narcos
264,352
Average Demand Expressions™ in 2016

Breaking Bad
487,591
Average Demand Expressions™ in 2016

1.8x MORE DEMAND
South Africa

2.6x
MORE DEMAND

Halt and Catch Fire
186,005
Average Demand Expressions™ in 2016

The Americans
486,670
Average Demand Expressions™ in 2016
Global Demand Portal
Global Demand Portal
Compare shows in any market

United States

10 Shows

Colony
Science Fiction, Action

32,982,047
21,012,064
1,997,288

Apr 11
Apr 1
Apr 24, 2016
Story Engagement
The Walking Dead

While watching the episode of TWD the only word that went through my mind was f***

Engagement Score

10
Global

The Walking Dead

While watching the episode of TWD the only word that went through my mind was f***

Engagement Score
10

13 - 19 Jun, 2016
Demand Breakdown
Demand Breakdown

- **P2P**: 19.6%
- **SOC**: 12.8%
- **PHO**: 20.8%
- **WIK**: 15.1%
- **MIC**: 14.7%
- **BLO**: 9.2%
- **VID**: 3.5%
- **FAN**: 8.2%
THE POSSIBILITIES ARE ENDLESS!