The Year In Demand

An Exclusive White Paper

for Members of the International Academy of Television Arts & Sciences

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INTERNATIONAL ACADEMY of TELEVISION ARTS & SCIENCES

PARROT ANALYTICS

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Introduction

The year 2016 was good for television. In the United States alone, over 400 scripted series aired, in addition to a myriad of unscripted and reality titles. Globally, the number of television titles must be many times more, though no one has yet attempted to count them all. Out of these thousands of shows, a select group of titles, including newcomers such as Netflix's *Stranger Things* and veterans such as HBO's *Game of Thrones*, succeeded in becoming global hits. These titles were popular not only in their home market but around the world. Many of these titles originated in the United States, but the proliferation of platforms available to consumers is increasing the global exposure of international titles as well. Netflix and now Amazon Video have launched in nearly every country; each market also has an increasing number of competing platforms, each stocked with a catalogue of global titles. Measuring the performance of content now involves not only linear viewership numbers, but also SVOD streams (if the platform chooses to release them), legal and illegal digital downloads and streaming, as well as less direct metrics such as social media buzz, critical acclaim, and word-of-mouth popularity, all across multiple languages and countries — and devices!

With the television landscape becoming more global and complicated by the year, measuring trends in content has become increasingly difficult. As a result, **Parrot Analytics** has developed the world's first cross-market, cross-platform measure of content demand. This metric, called **Demand Expressions™**, quantifies the popularity of a TV series and is generated for each title, in each market, on each day. By tracking demand over time, global content trends can be found, giving insight into the current state of television content.

Using **Demand Expressions™**, this report analyzes the major trends in demand over 2016 in four regions: Asia, Europe, Latin America, and North America. By averaging the demand by title, the top ten titles of last year are found in each region, uncovering different content preferences between these global markets. The percent of demand from genres and major sub-genres also varies by region, revealing more insights into the most popular content around the world.

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Top Titles by Region in 2016

For each region in this report, individual titles were ranked by their yearly average demand to find the ten most popular series of the year. The global prevalence of American content meant that many of the top titles were the same between these regions.
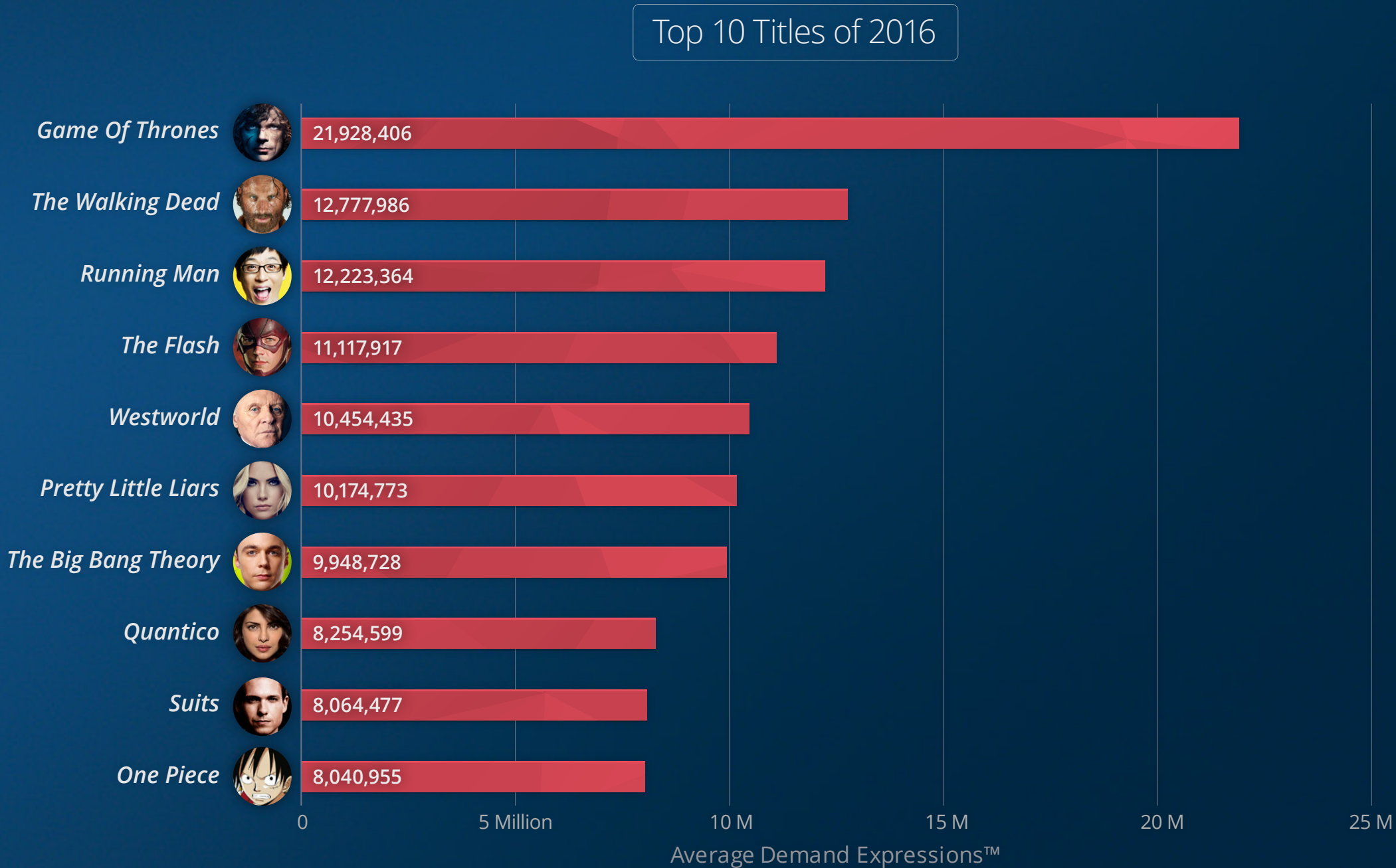
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Local titles and talent popular in Asia

Game of Thrones dominated the scene in Asia with 72% more demand than the second-most popular title *The Walking Dead* while the third-placed title was South Korean variety show *Running Man*. This regional series had a higher average demand over 2016 than the most popular superhero title in Asia, *The Flash*, as well as HBO's newest hit Westworld. The next-most popular title in Asia was the long-running anime *One Piece*, which ranked tenth overall in the region.

Another unique show to appear in Asia's top ten was ABC's thriller *Quantico*, starring popular Bollywood actress Priyanka Chopra. Because of her background, the series had unusually high demand in India over the past year, thus placing it among the most popular titles in Asia.

Top 10 Titles of 2016

Title	Average Demand Expressions™
Game Of Thrones	21,928,406
The Walking Dead	12,777,986
Running Man	12,223,364
The Flash	11,117,917
Westworld	10,454,435
Pretty Little Liars	10,174,773
The Big Bang Theory	9,948,728
Quantico	8,254,599
Suits	8,064,477
One Piece	8,040,955

Average Demand Expressions™

Demand Expressions™: Total audience demand being expressed for a title, within a market.

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Many genres in-demand in Europe
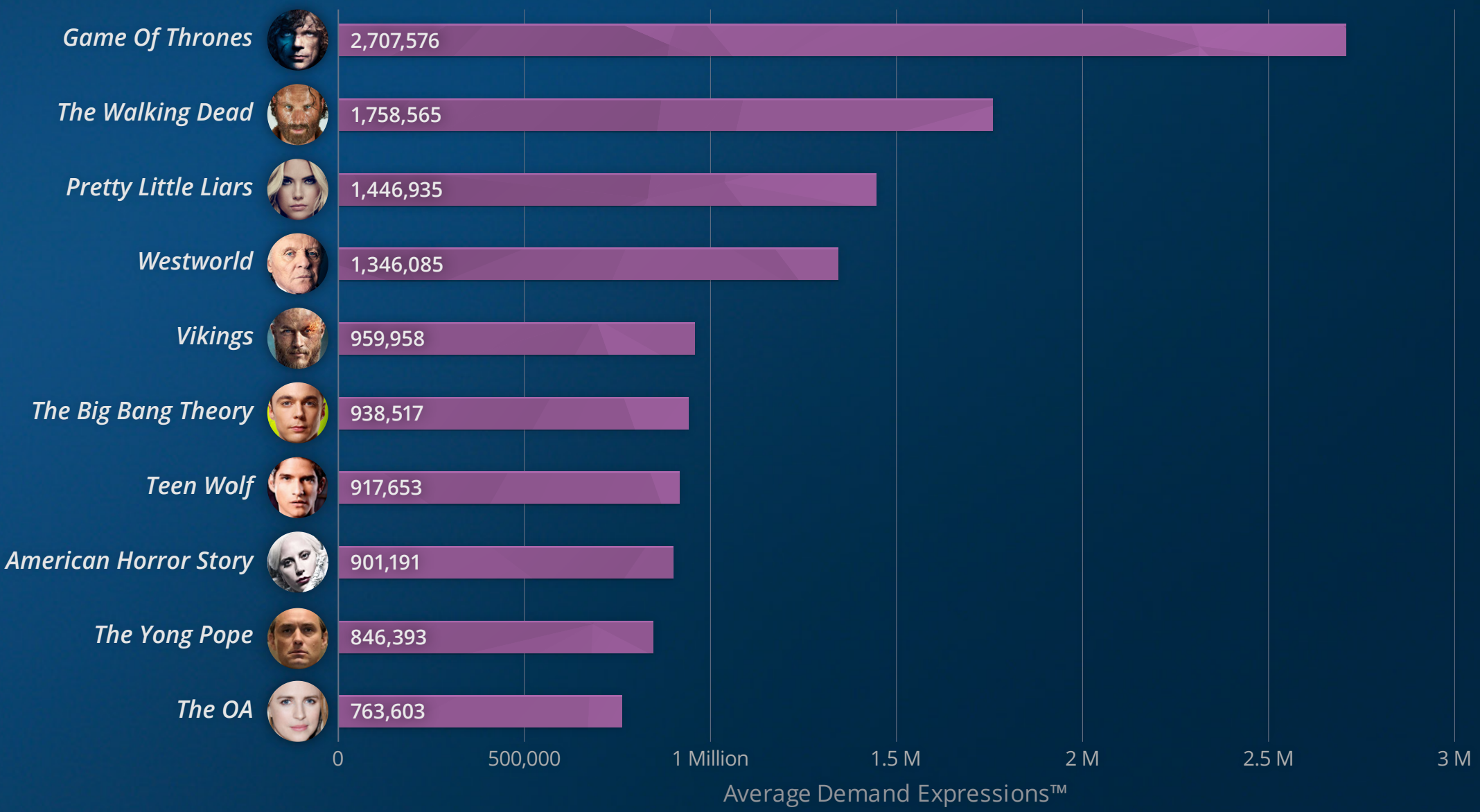
Top 10 Titles of 2016

As in Asia, *Game of Thrones* had a significant 54% more demand than any other title in Europe. The second to fourth-ranked titles, including *Westworld*, formed a second tier of demand with 40% more popularity than the other top series.

The remaining titles in the top ten represented a range of genres and target demographics, from *The Big Bang Theory* to *Vikings* to new Netflix mystery *The OA*. This mix indicates that tastes in Europe are quite varied.

New titles had some success in this region. In addition to *Westworld* and *The OA*, *The Young Pope* attracted significant popularity during its run on Sky Atlantic and HBO in several European markets.

Title	Average Demand Expressions™
Game Of Thrones	2,707,576
The Walking Dead	1,758,565
Pretty Little Liars	1,446,935
Westworld	1,346,085
Vikings	959,958
The Big Bang Theory	938,517
Teen Wolf	917,653
American Horror Story	901,191
The Yong Pope	846,393
The OA	763,603

Average Demand Expressions™

Demand Expressions™: Total audience demand being expressed for a title, within a market.

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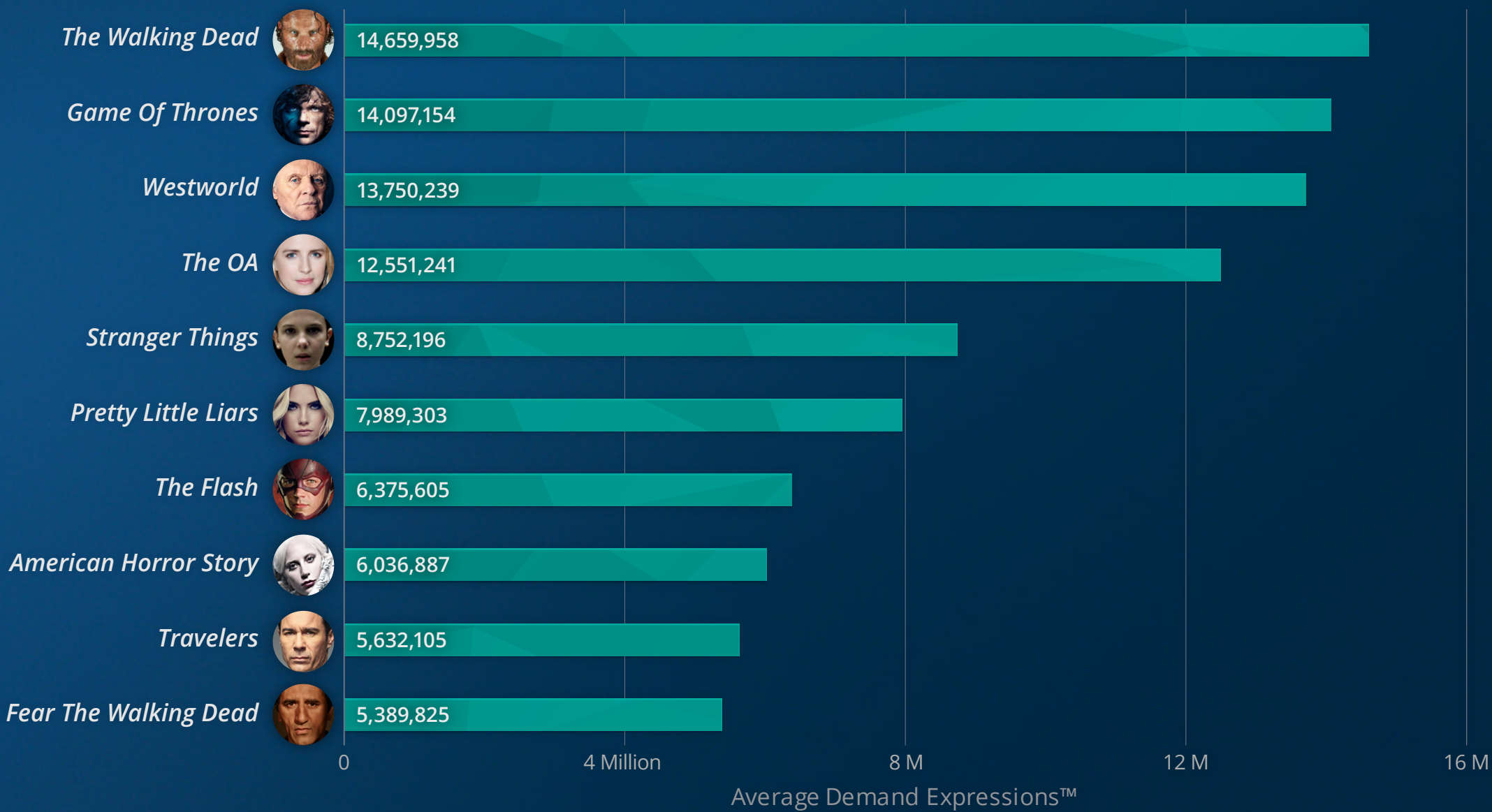# Mysteries and the supernatural on top in Latin America
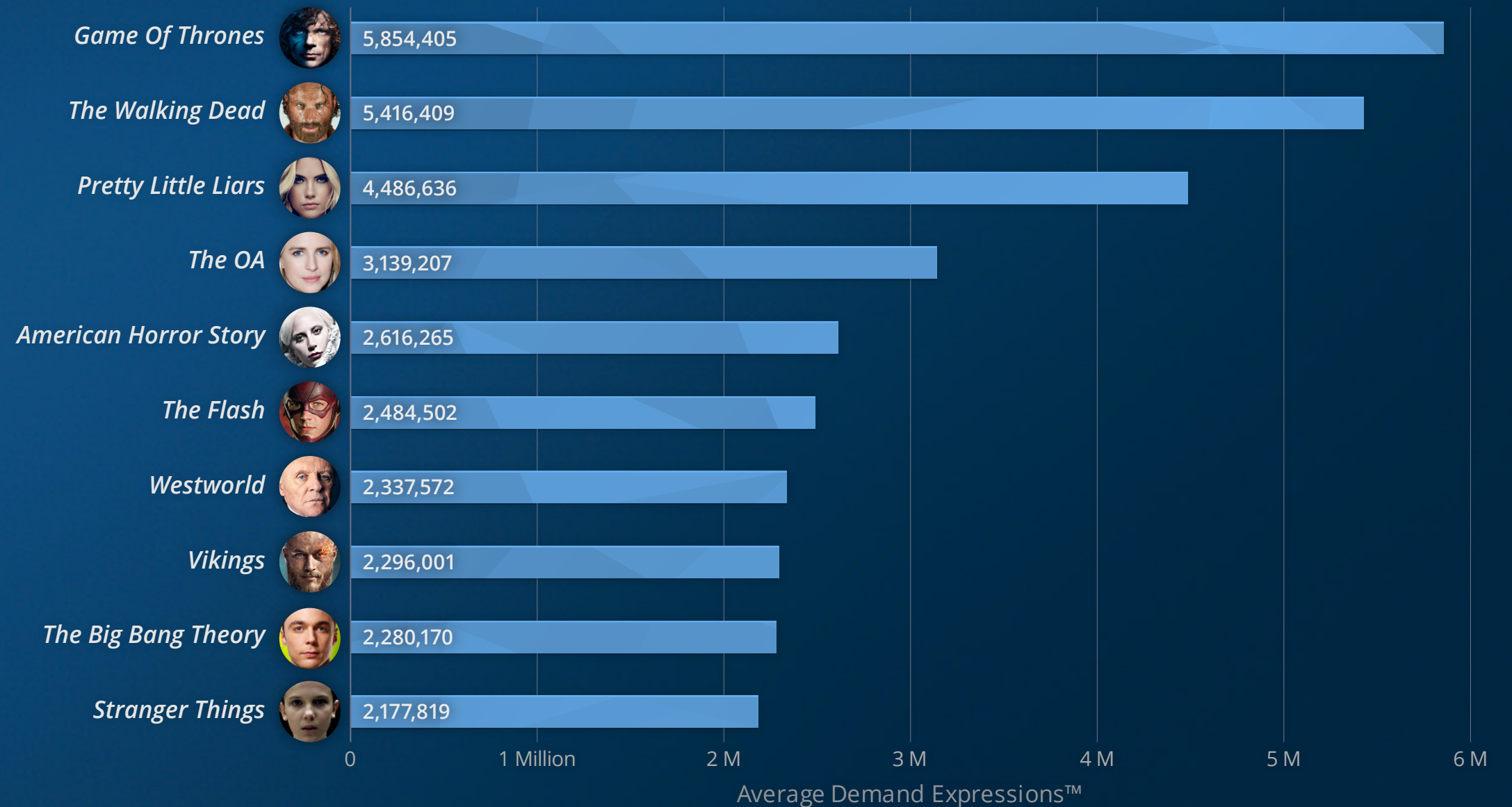
The most popular titles in Europe and Asia had a broad range of genres, but the top shows in Latin America had a narrower spread. With the exception of *The Big Bang Theory*, the most in-demand titles in this region all contained a combination of mystery (*Pretty Little Liars*), fantasy and the supernatural (*Stranger Things*), and/or action-adventure (*Vikings*). This concentration of genres indicates strong interest for these types of titles in these countries.

Though *The OA* was only released on December 16th, 2016, its yearly average demand ranked fourth in Latin America so it must have been popular immediately after its release. However, the title ranked tenth in Europe and not at all in Asia: These regions did not respond to Netflix's latest original as enthusiastically as Latin America.

Top 10 Titles of 2016

Title	Average Demand Expressions™
Game Of Thrones	5,854,405
The Walking Dead	5,416,409
Pretty Little Liars	4,486,636
The OA	3,139,207
American Horror Story	2,616,265
The Flash	2,484,502
Westworld	2,337,572
Vikings	2,296,001
The Big Bang Theory	2,280,170
Stranger Things	2,177,819

Average Demand Expressions™

Demand Expressions™: Total audience demand being expressed for a title, within a market.

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SVOD originals rank highly in North America

Top 10 Titles of 2016

Unlike the other three regions, in North America *The Walking Dead* ranked highest over the past year with about 4% more demand than *Game of Thrones*, and while these two megahits dominated elsewhere *Westworld* had only 2% less demand than its fellow HBO series in this region. Instead of one breakout title, North America had several hits in 2016.

Other new titles, especially from Netflix, also ranked highly: *The OA* and *Stranger Things* were more popular on average than teen hit *Pretty Little Liars*, and the Canadian series *Travelers* had 4% more demand than *The Walking Dead's* spinoff. Because these titles were initially released in North America, for this market, it makes sense that new titles were most popular here.

Title	Average Demand Expressions™
The Walking Dead	14,659,958
Game Of Thrones	14,097,154
Westworld	13,750,239
The OA	12,551,241
Stranger Things	8,752,196
Pretty Little Liars	7,989,303
The Flash	6,375,605
American Horror Story	6,036,887
Travelers	5,632,105
Fear The Walking Dead	5,389,825

Average Demand Expressions™

Demand Expressions™: Total audience demand being expressed for a title, within a market.

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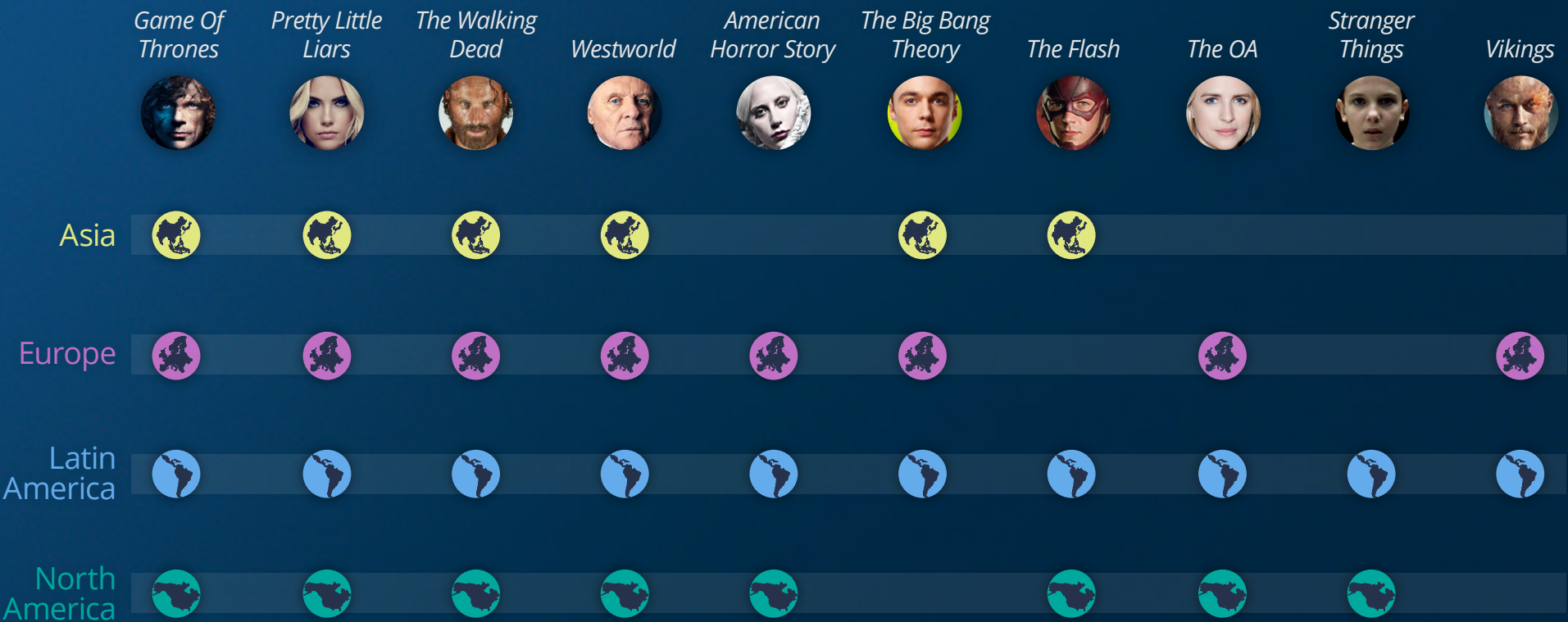ANALYTICS

Four titles were true global hits

Out of the most in-demand titles in each region, ten titles appeared in two or more. These titles, along with the regions where they were popular, are plotted in the table. Four of the titles — *Game of Thrones*, *Pretty Little Liars*, *The Walking Dead*, and *Westworld* — were among the top titles in all four regions, making them hits on a truly global scale.

Four more titles were in-demand in three out of four regions, and the remaining two titles popular in only two regions. All six of these titles were popular in **Latin America**, meaning that this region had no title within its top ten that was not popular in another region. The other regions had popular titles that revealed the unique type of content popular there:

- **Asia** had *Running Man* and *Quantico*, indicating a preference for local talent.
- **Europe** had *Teen Wolf* and *The Young Pope*, a title that premiered in the region at the end of the year.
- **North America** had *Travelers* and *Fear the Walking Dead*, a new Canadian title and one related to the most popular series in the region.

Generally, titles from the US tended to be most popular but the appearance of regional titles such as *Running Man* and *The Young Pope* suggest that the production of quality, in-demand local content will become global.

Regions Where Title is in the Top 10

	Game Of Thrones	Pretty Little Liars	The Walking Dead	Westworld	American Horror Story	The Big Bang Theory	The Flash	The OA	Stranger Things	Vikings
Asia	●	●	●	●		●	●			
Europe	●	●	●	●	●	●		●		●
Latin America	●	●	●	●	●	●	●	●	●	●
North America	●	●	●	●	●		●	●	●	

Demand Expressions™: Total audience demand being expressed for a title, within a market.

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Top Genres by Region in 2016

The share of demand– the percent of the total yearly demand that went to each type of series– was found for the major genres in each region. In addition, the demand for titles in each sub-genre was totaled and ranked to find the top ten most popular sub-genres. These metrics reveal broader content trends in each region.
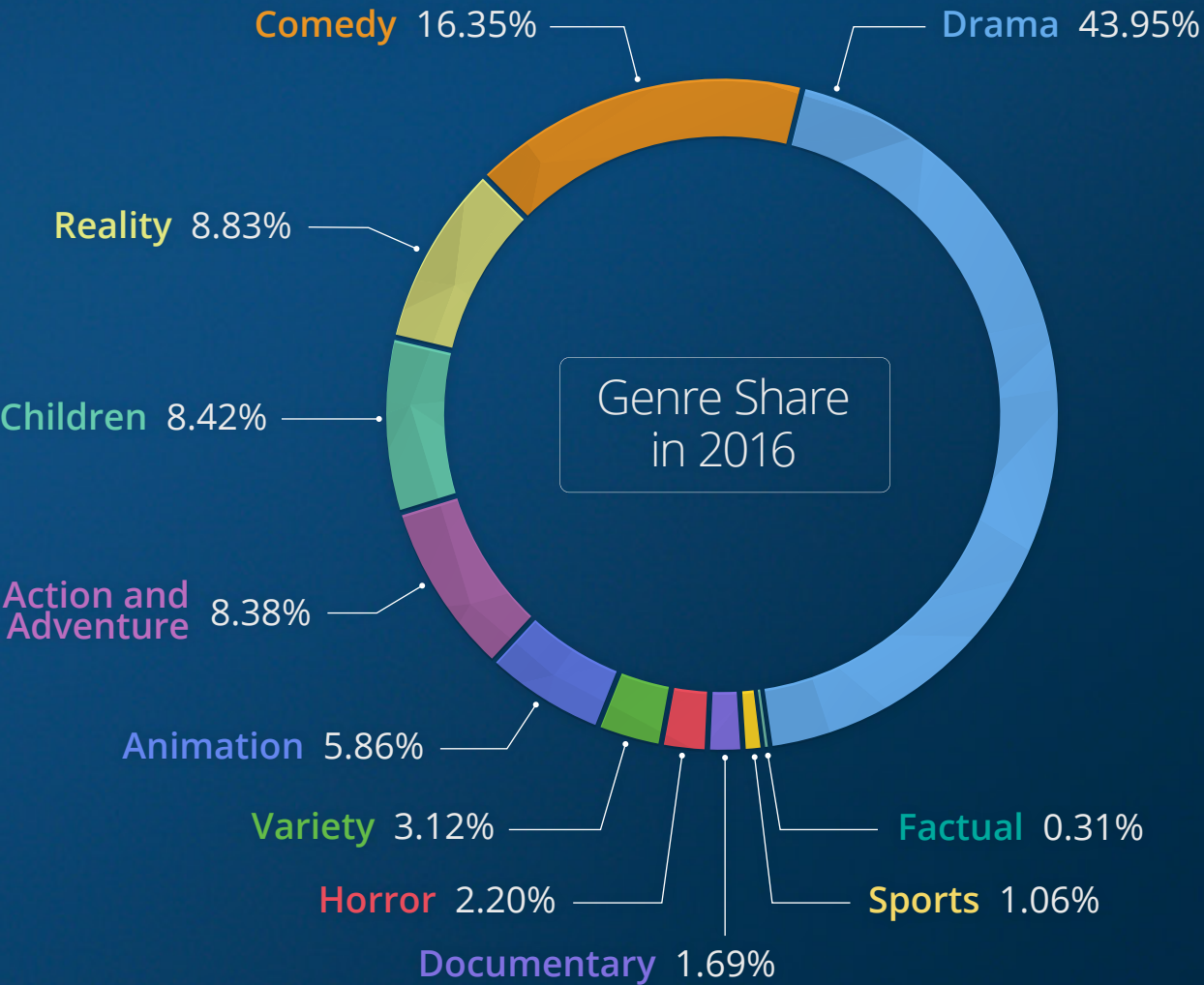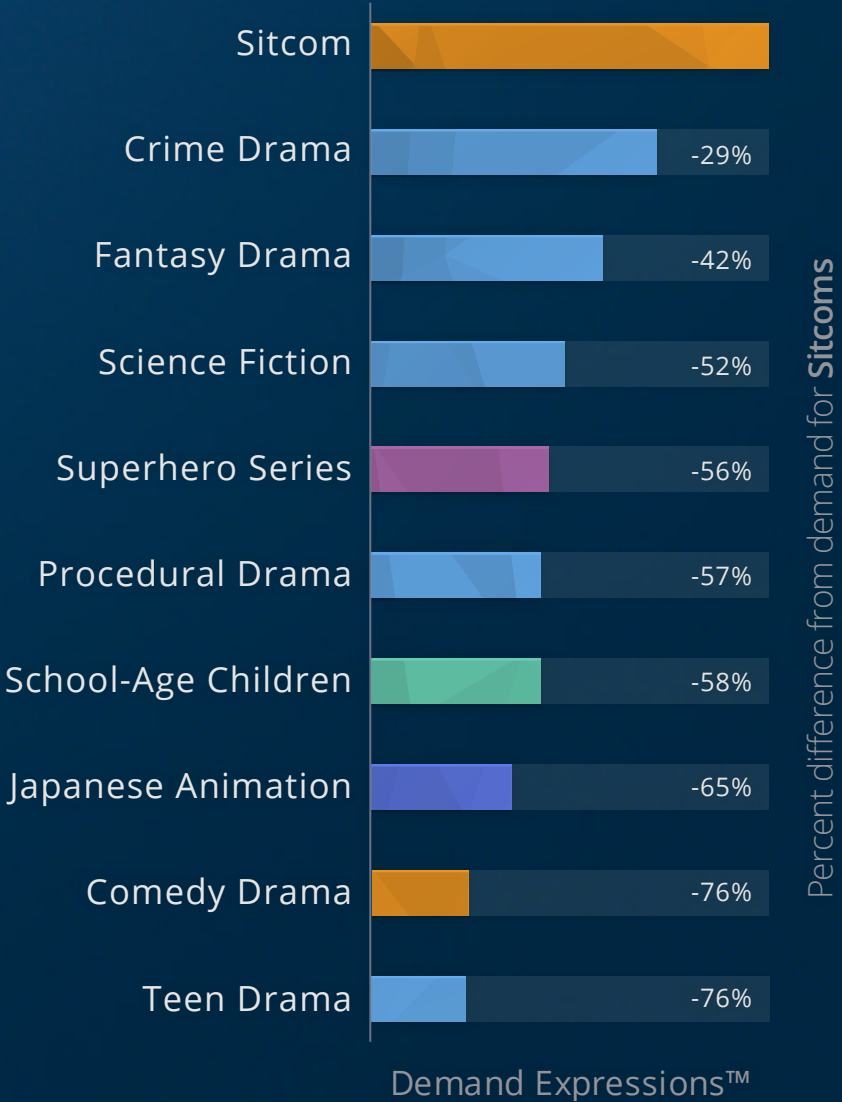
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Wide range of genres attracted demand in Asia

The share of demand by genre reveals how much of the yearly demand in a region went to each type of series. With the largest number of titles, dramas naturally dominate. In Asia, 44% of all demand was for drama, over 2.5 times greater than the 16% for the second-place comedies. In contrast, sports-related and factual (news) titles had few titles and very little demand.

The total demand for each sub-genre was ranked to gain more insight into the most popular types of titles. In Asia, sitcoms (a sub-genre with many entries) attracted the most demand in 2016, while crime dramas were second with 29% less demand. Many of these sub-genres are popular around the world, but Asia had a particular interest in Japanese animated series.

Genre Share in 2016

- Comedy 16.35%
- Drama 43.95%
- Reality 8.83%
- Children 8.42%
- Action and Adventure 8.38%
- Animation 5.86%
- Variety 3.12%
- Horror 2.20%
- Documentary 1.69%
- Sports 1.06%
- Factual 0.31%

Top 10 Sub-Genres by Total Demand in 2016

Sub-Genre	Percent difference from demand for Sitcoms
Sitcom	
Crime Drama	-29%
Fantasy Drama	-42%
Science Fiction	-52%
Superhero Series	-56%
Procedural Drama	-57%
School-Age Children	-58%
Japanese Animation	-65%
Comedy Drama	-76%
Teen Drama	-76%

Demand Expressions™

Demand Expressions™: *Total audience demand being expressed for a title, within a market.*
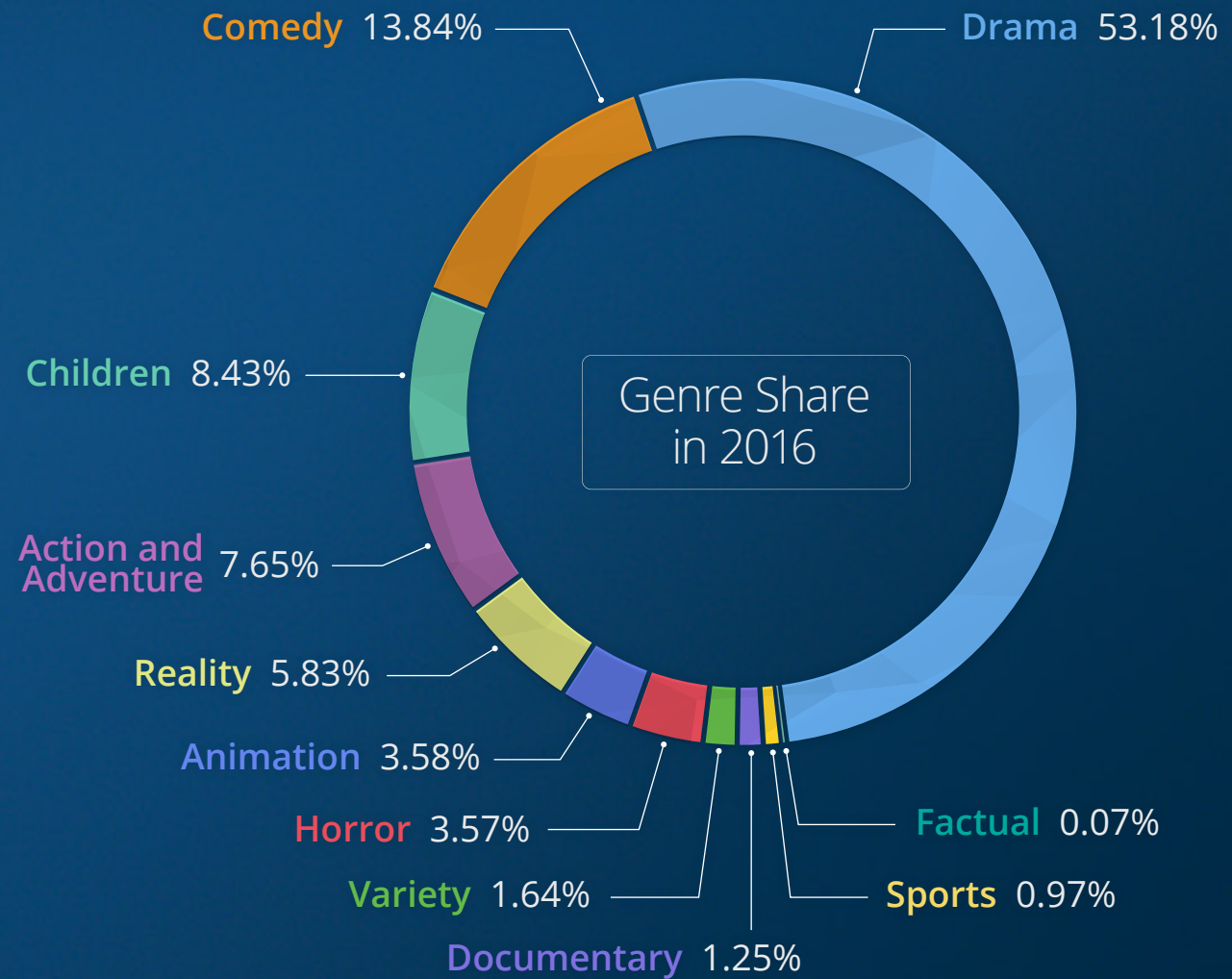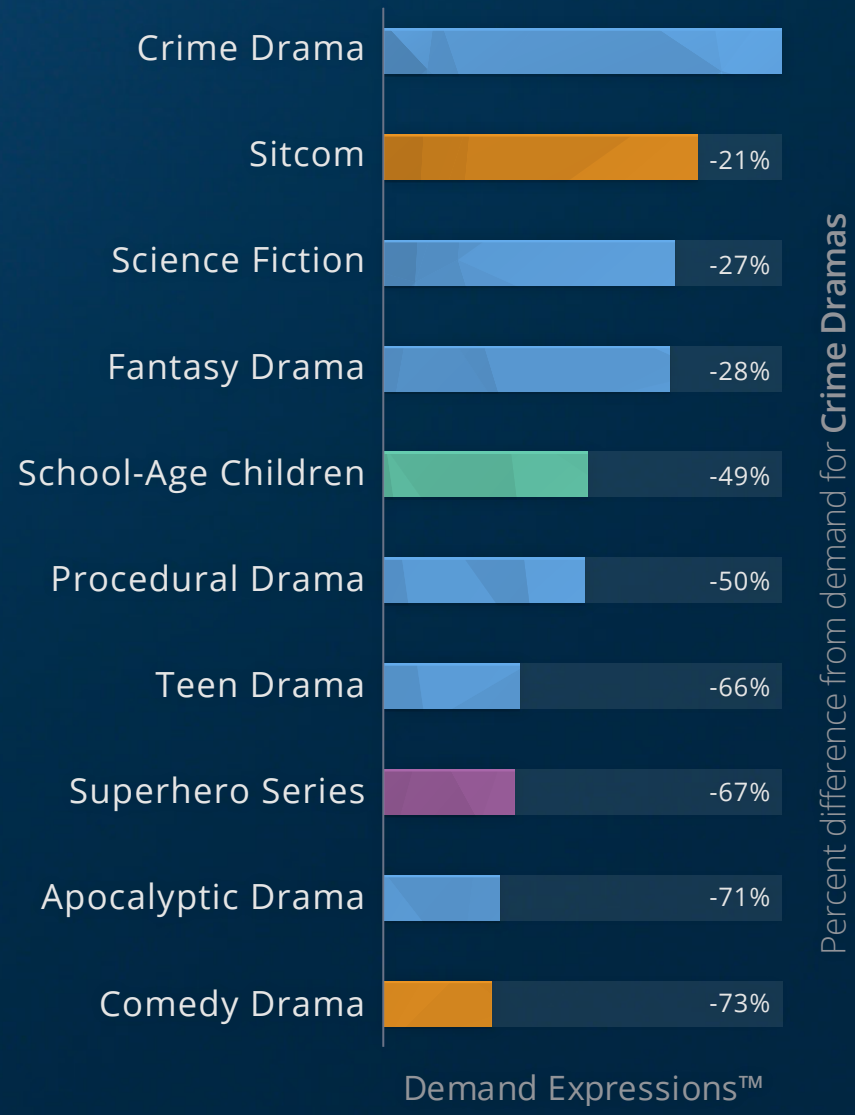
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Dramas, especially crime dramas, led in Europe

In Europe, dramas had the highest share of demand out of any region, indicating that this genre was unusually popular here. The ranking of sub-genres supports this conclusion as well: unlike the other regions, crime dramas overtook sitcoms to have the most demand in Europe. Science fiction and fantasy dramas have nearly as much demand as sitcoms, and the remaining top sub-genres (with the possible exception of children's titles) had dramatic elements.

Despite the popularity of dramas in Europe, comedy still had 14% of the total demand, the second-largest share. However, while reality titles ranked third in Asia with a 9% share, in Europe they were much less popular, ranking fifth with only a 6% share of total demand.

Genre Share in 2016

- Drama 53.18%
- Comedy 13.84%
- Children 8.43%
- Action and Adventure 7.65%
- Reality 5.83%
- Animation 3.58%
- Horror 3.57%
- Variety 1.64%
- Documentary 1.25%
- Sports 0.97%
- Factual 0.07%

Top 10 Sub-Genres by Total Demand in 2016

Sub-Genre	Percent difference from demand for Crime Dramas
Crime Drama	
Sitcom	-21%
Science Fiction	-27%
Fantasy Drama	-28%
School-Age Children	-49%
Procedural Drama	-50%
Teen Drama	-66%
Superhero Series	-67%
Apocalyptic Drama	-71%
Comedy Drama	-73%

Demand Expressions™

Demand Expressions™: Total audience demand being expressed for a title, within a market.
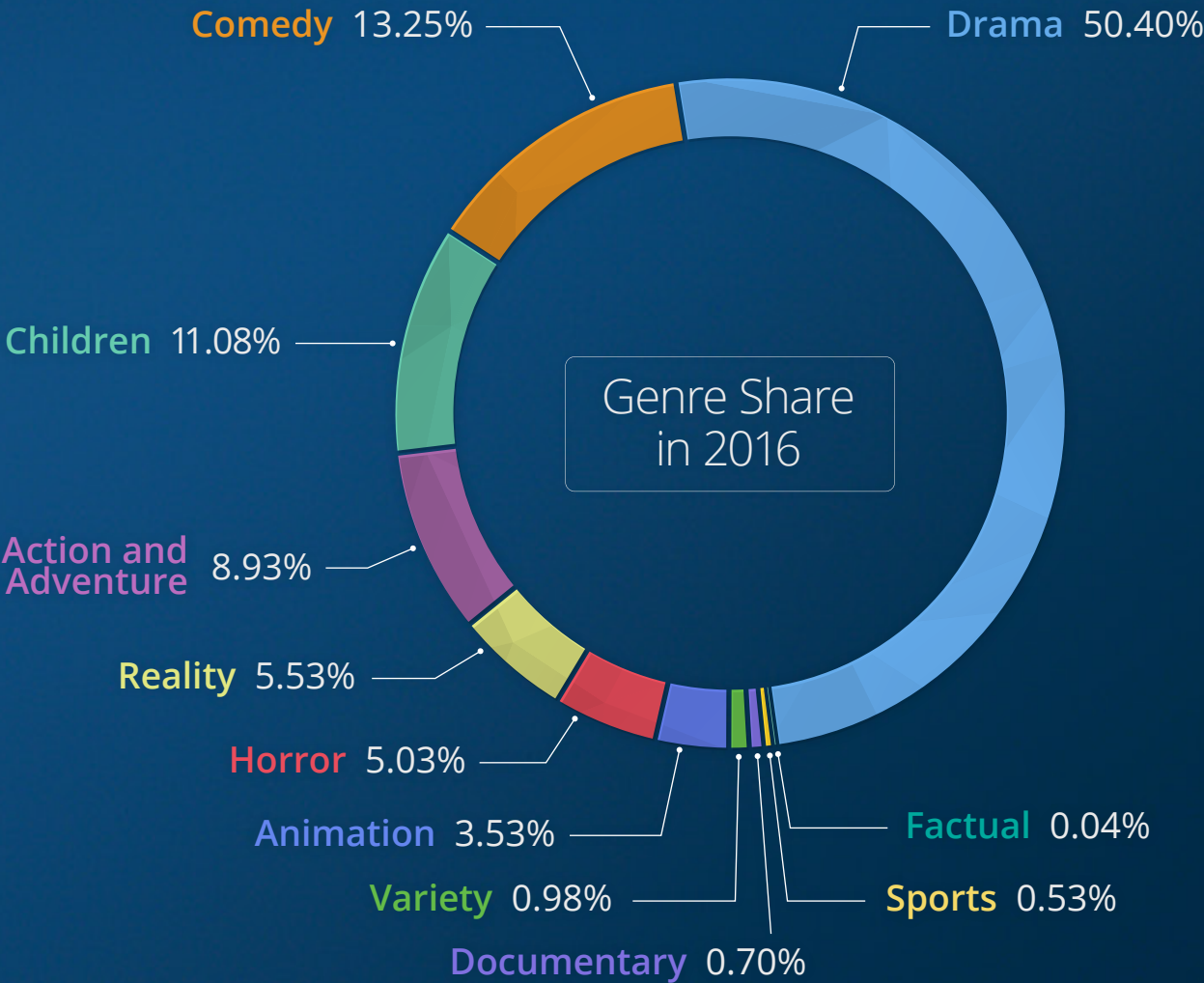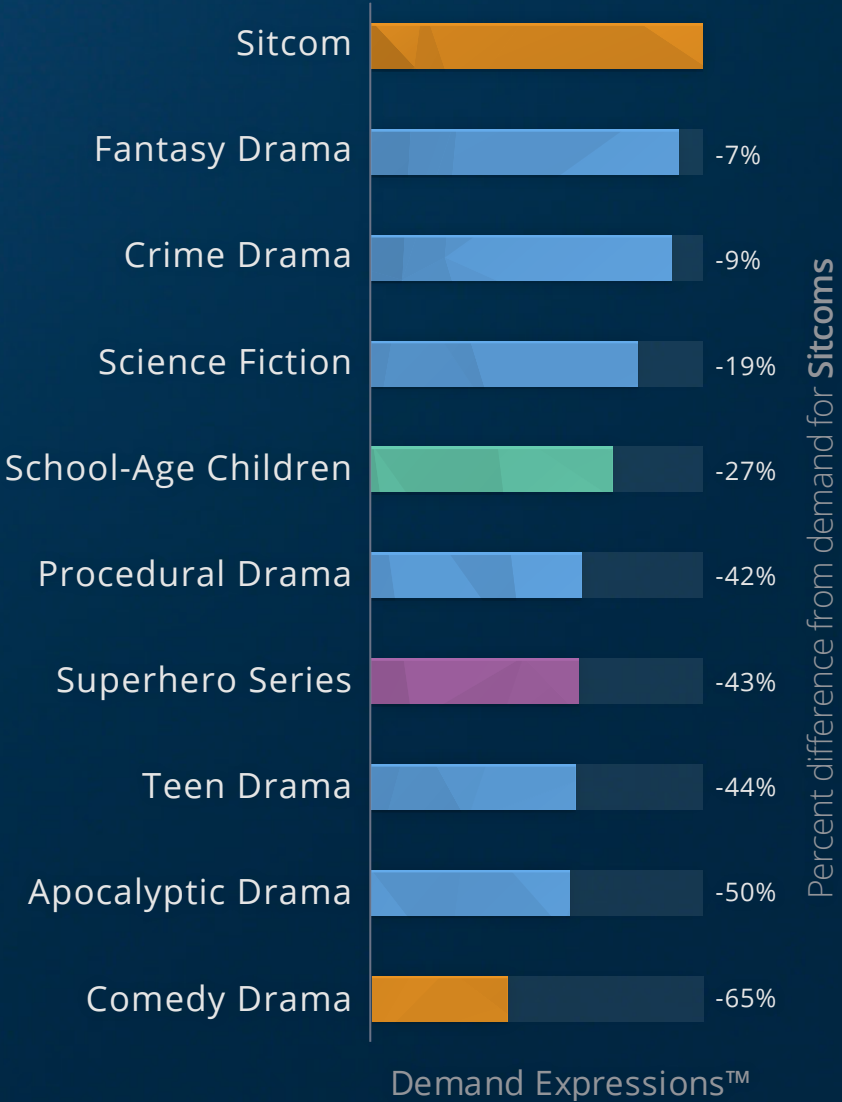
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Children's and horror titles had largest share in Latin America

Despite the popularity of specific types of dramas, sitcoms were the sub-genre with the most total demand in Latin America. Dramas had a 50% share of all demand though, and fantasy and crime dramas were only 7% and 9% behind sitcoms, respectively. The popular mystery and action titles in the top ten helped their small sub-genres: teen drama and superhero series have over half as much demand as sitcoms.

Children's titles had the largest share of demand out of any region in Latin America, where they were only 2% behind comedies at 11% of demand. Horror titles were the same, with a global high of 5% of genre demand in this region. In contrast, reality titles were least popular in Latin America with only a 5.5% share.

Genre Share in 2016

- Drama 50.40%
- Comedy 13.25%
- Children 11.08%
- Action and Adventure 8.93%
- Reality 5.53%
- Horror 5.03%
- Animation 3.53%
- Variety 0.98%
- Documentary 0.70%
- Sports 0.53%
- Factual 0.04%

Top 10 Sub-Genres by Total Demand in 2016

Sub-Genre	Percent difference from demand for Sitcoms
Sitcom	
Fantasy Drama	-7%
Crime Drama	-9%
Science Fiction	-19%
School-Age Children	-27%
Procedural Drama	-42%
Superhero Series	-43%
Teen Drama	-44%
Apocalyptic Drama	-50%
Comedy Drama	-65%

Demand Expressions™

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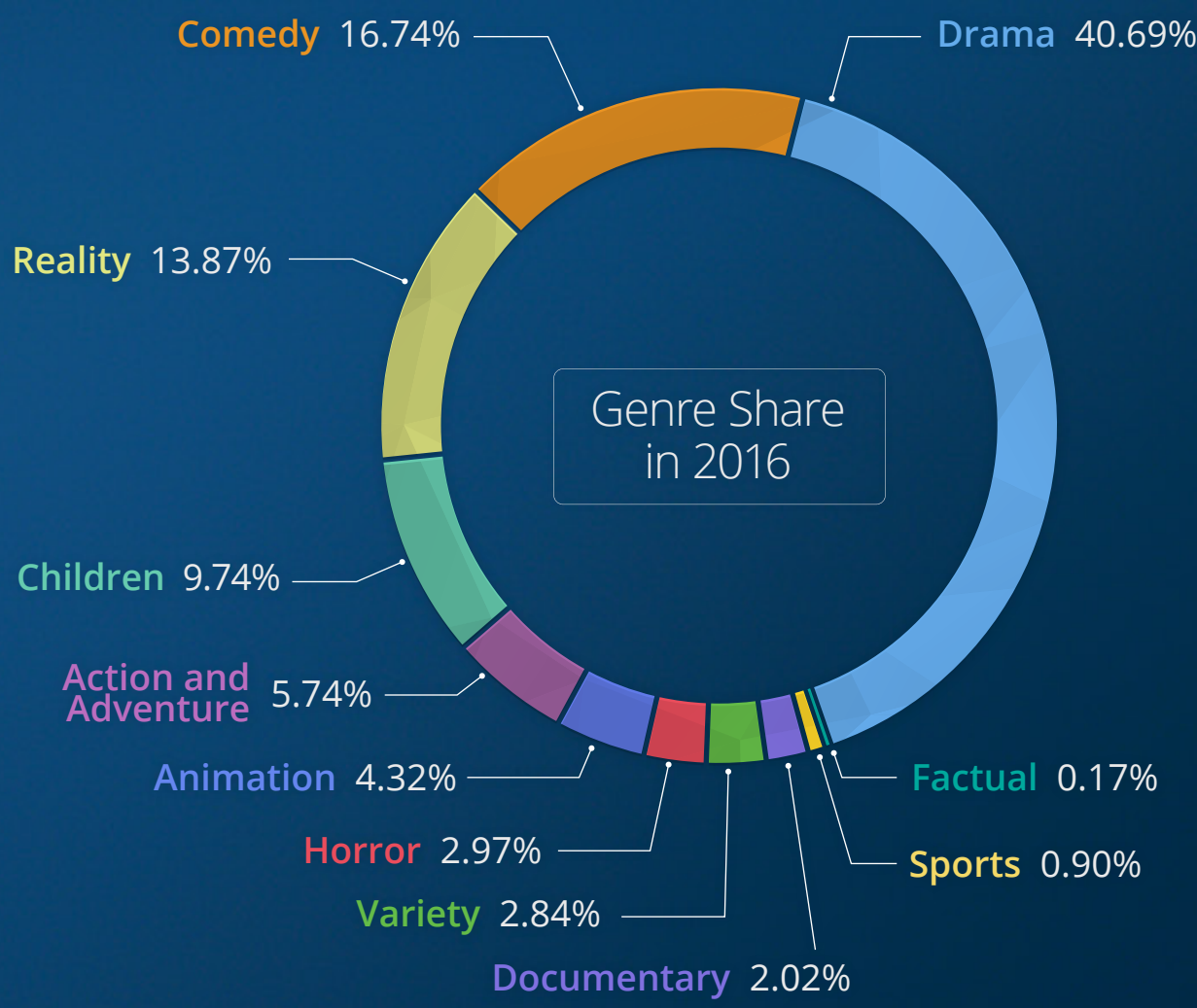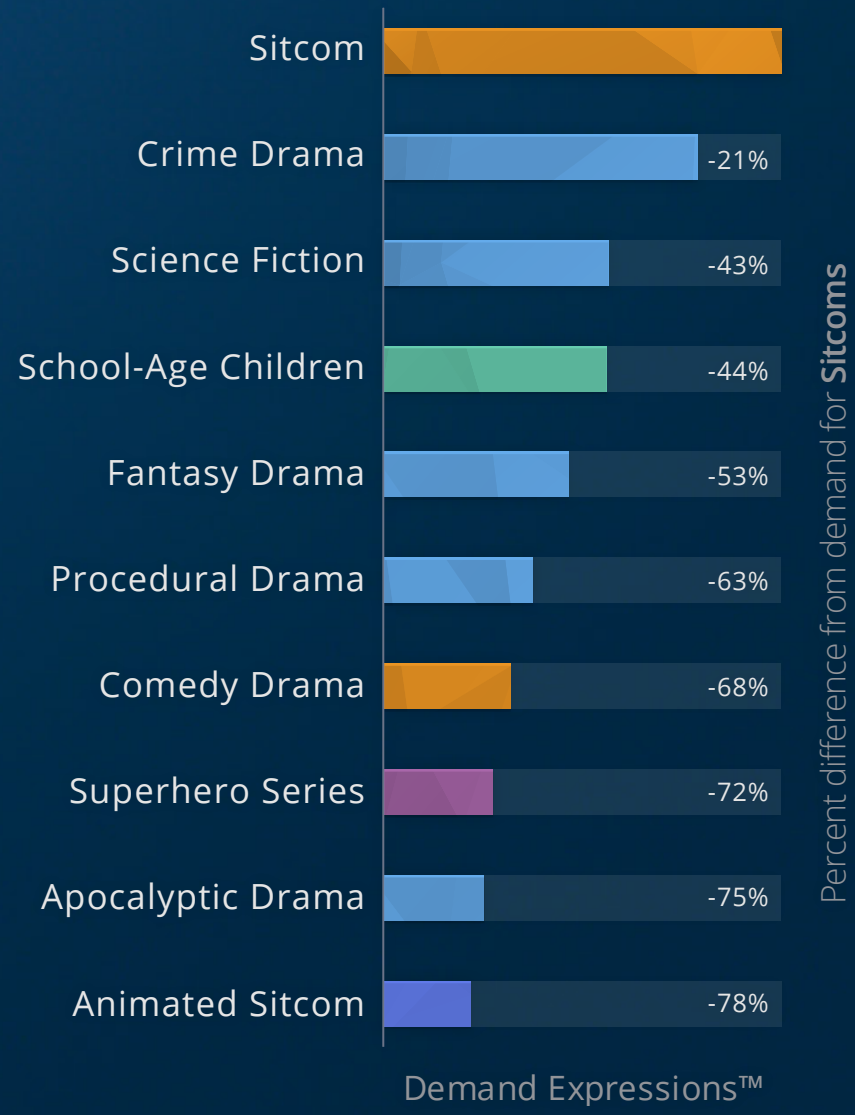
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Comedies and reality shows most popular in North America

Dramas had the smallest share of demand in North America out of the global regions, with only about 40% of demand. Comedies, at over 16%, and reality titles, at 13%, both had their largest share in this region. As in Asia and Latin American, sitcoms had the most demand, but the teen drama sub-genre was replaced here by animated sitcoms.

The reasons for these region-specific demand trends are more straightforward here than in other regions. Comedies were likely especially popular in North America as most of them are English-language titles and humor is difficult to translate and localize. Reality television is most prolific and popular in the United States. Animated sitcoms, such as Family Guy, often base their storylines and humor on topical, local pop culture, limiting their appeal in other global markets.

Genre Share in 2016

- Drama 40.69%
- Comedy 16.74%
- Reality 13.87%
- Children 9.74%
- Action and Adventure 5.74%
- Animation 4.32%
- Horror 2.97%
- Variety 2.84%
- Documentary 2.02%
- Sports 0.90%
- Factual 0.17%

Top 10 Sub-Genres by Total Demand in 2016

Sub-Genre	Percent difference from demand for Sitcoms
Sitcom	
Crime Drama	-21%
Science Fiction	-43%
School-Age Children	-44%
Fantasy Drama	-53%
Procedural Drama	-63%
Comedy Drama	-68%
Superhero Series	-72%
Apocalyptic Drama	-75%
Animated Sitcom	-78%

Percent difference from demand for Sitcoms

Demand Expressions™

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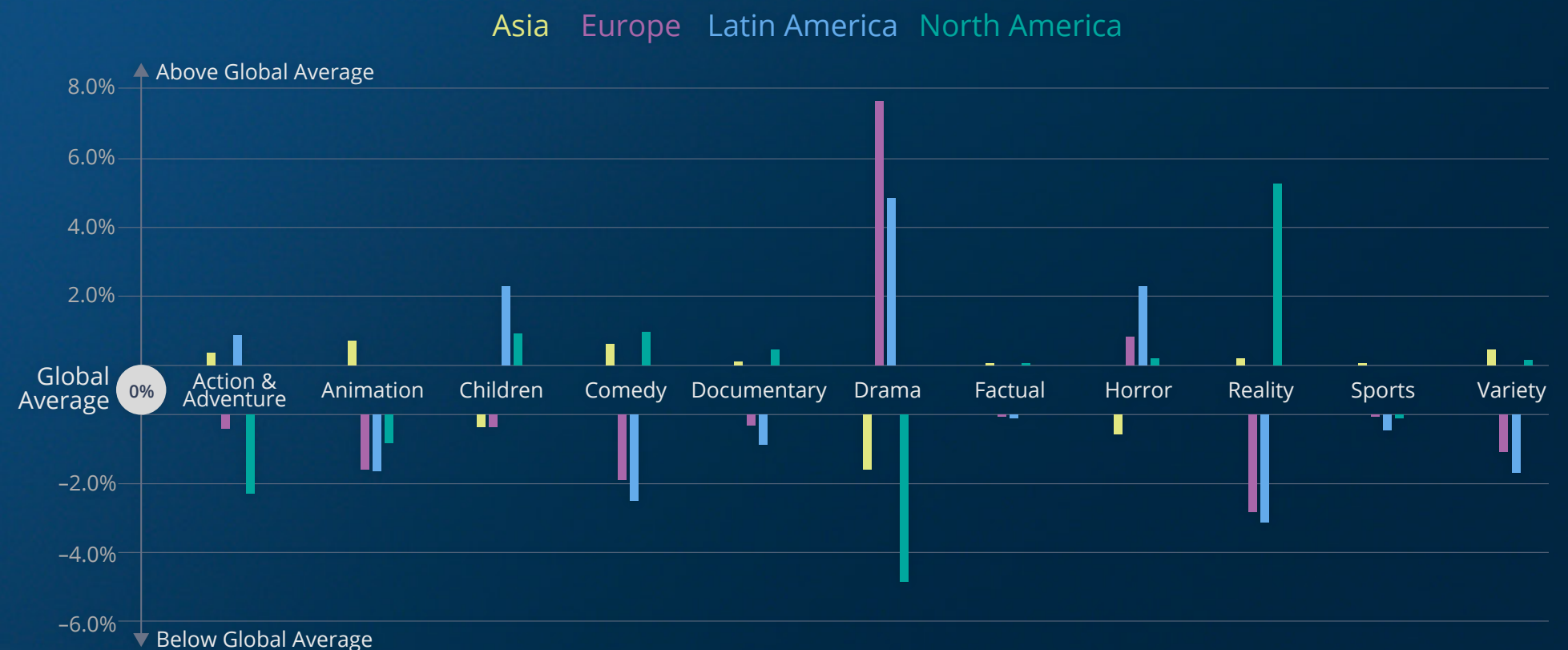
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Dramas, reality series most regionally polarized

To determine how the genre trends in each region differed, the share of demand for each genre was subtracted from the genre's global share of demand. This difference in share, either positive or negative, was plotted by region, revealing where each genre over- or under-indexed.

- **Asia**, as the most populous region, contributed the most *Demand Expressions™* to the global share and so their genre differences from the global share are the smallest. Only dramas differed from the global share by more than 1%.

- In contrast, **Europe** had the largest regional preference for dramas, with 7.6% more than the global share, which was the largest regional genre difference in 2016.

- **Latin America** had the largest average change from the global genre shares, strongly preferring drama, action, children's, and horror titles over animation, comedy, reality, and variety titles.

- The preference for reality series in **North America** is balanced out by their -4.9% share of drama demand.

Overall, no region differed from the global share for a genre by more than 8% and the average absolute change was 1.3%. These small values indicate that genre trends are generally similar around the world, though individual genres, such as dramas and reality series, have relatively large deviations in certain regions.

Regional Differences from Global Genre Share

Asia   Europe   Latin America   North America

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Measuring global content demand

File Sharing /
P2P Platforms

Social
Media

Photo Sharing
Sites

Blogging
Sites

Video
Streaming
Sites

Fan & Critic
Rating Sites

Microblogging
Sites
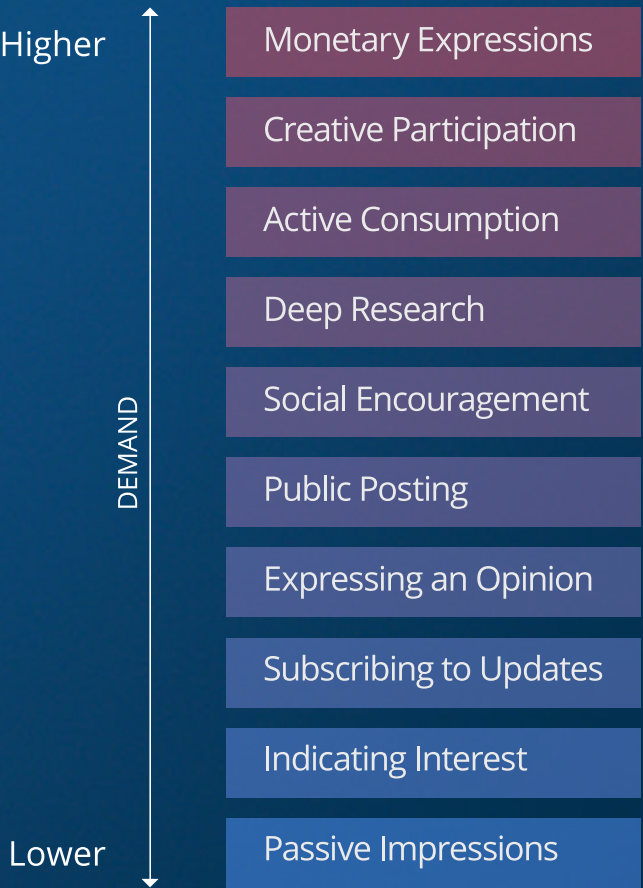
Wikis &
Informational
Sites

Parrot Analytics is a technology and data science company that measures global demand for television content.

Consumers express their demand for content through various "demand expression platforms" including:

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

Industry-first: *DemandRank™*

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

Higher

DEMAND

Lower

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

Global Demand Measurement

To solve the industry's measurement challenge with the rapid proliferation of content distribution platforms and unprecedented levels of consumer fragmentation, **Parrot Analytics** has developed the world's first and only cross-platform, country-specific and real-time content **Demand Measurement** system, where **Demand Expressions™** are one of the components.

Demand Expressions™

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

Characteristics of **Demand Expressions™**:

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

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

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

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Global Demand Measurement
Cross-Platform, Country-Specific, Real-Time

Parrot Analytics' **Demand Measurement System** *is leveraged by leading global media organizations to understand global demand for content across their (and their competitors') portfolios, enabling them to increase the yield on their investments, acquisitions, marketing and distribution strategies to ultimately stand out in a crowded market through an unprecedented understanding of global content popularity.*

For more on **Parrot Analytics'**
Global Demand Measurement System,

read the **GUIDE** 📄

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