

○ REALITY

COMEDY-DRAMA ○

COMEDY ○

DRAMA ○

○ SCI-FI

○ ANIMATION

○ DOCUMENTARY

# The Global Television Demand Report

Audience title discovery, SVOD platform growth, digital original series popularity and global genre TV demand trends in 2017



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# Executive Summary

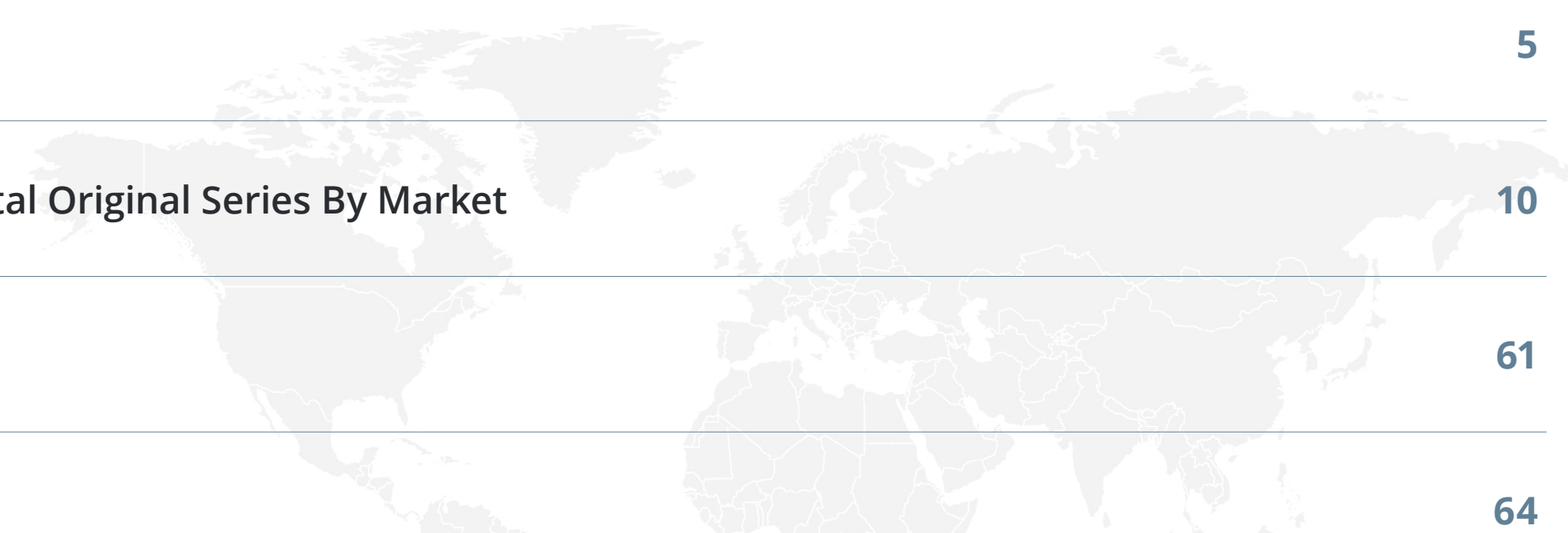
January–December, 2017

- ▶ From 2013 to 2017, the amount invested in content by the major three SVOD platforms increased from \$5.5 billion to \$13 billion, with no signs of slowing down.
- ▶ The number of digital original series has increased exponentially as a result of the increasing investment, driving the highest level of SVOD subscribers in 2017 with **Netflix** surpassing the 100 million subscriber worldwide mark.
- ▶ **Netflix** had 64% to 88% demand share by total digital original series popularity in all markets examined in this report. While demand for **Amazon** generally decreased, the demand for **Hulu** grew over the year.
- ▶ In most markets, word of mouth (both offline and online) is the most common way that people discover new content to watch, with about 34% of people in each market looking to friends and family for show recommendations.
- ▶ Offline, television listings/guides and advertisements are the next-most common discovery method with about 26% of people finding new shows this way. Online, about 19% of people discover new content by browsing articles, news and blogs.
- ▶ Drama titles had the most demand throughout 2017, but the release of popular titles such as *Stranger Things*, *Star Trek: Discovery*, *Black Mirror*, and *Dark* increased the demand for science fiction titles in quarter 4.
- ▶ The second season of *Stranger Things* was the most popular digital original series in nine out of the ten markets in 2017; in Australia, *13 Reasons Why* was the most popular series.

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# Introduction

January–December, 2017

## Demand as the new paradigm

In this ninth edition of **Parrot Analytics' Global Television Demand Report**, the demand for all digital original series in ten global markets was analyzed over the entirety of 2017 and aggregated by platform and genre. These digital original series are original content produced by SVOD platforms around the world, including the major services Netflix, Hulu, and Amazon, as well as smaller players such as Crackle, YouTube Red and CBS All Access. 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 industry standard demand metric enables Parrot Analytics to wield the industry's most powerful TV metric linking consumers and content across the globe.

Using Demand Expressions, a vast array of analyses become possible. Demand is country-specific, meaning that the differences in demand for content between markets can be empirically measured even if that content has not yet been officially released in that market. Demand is also

platform-agnostic: While performance metrics may be available for certain titles on linear TV, **Parrot Analytics' Demand Expressions** metric reaches all content, from the popular broadcast programs to obscure cable titles, to SVOD digital original series, on which very little data has been released. Knowing the demand for all this content allows for empirical content acquisition, licensing, marketing and advertising decisions to be made, with a full picture of the state of content demand in any given market. In an industry traditionally guided by intuition and gut feelings, gaining insights into the actual demand for content, no matter the platform or market, is a definite competitive advantage.

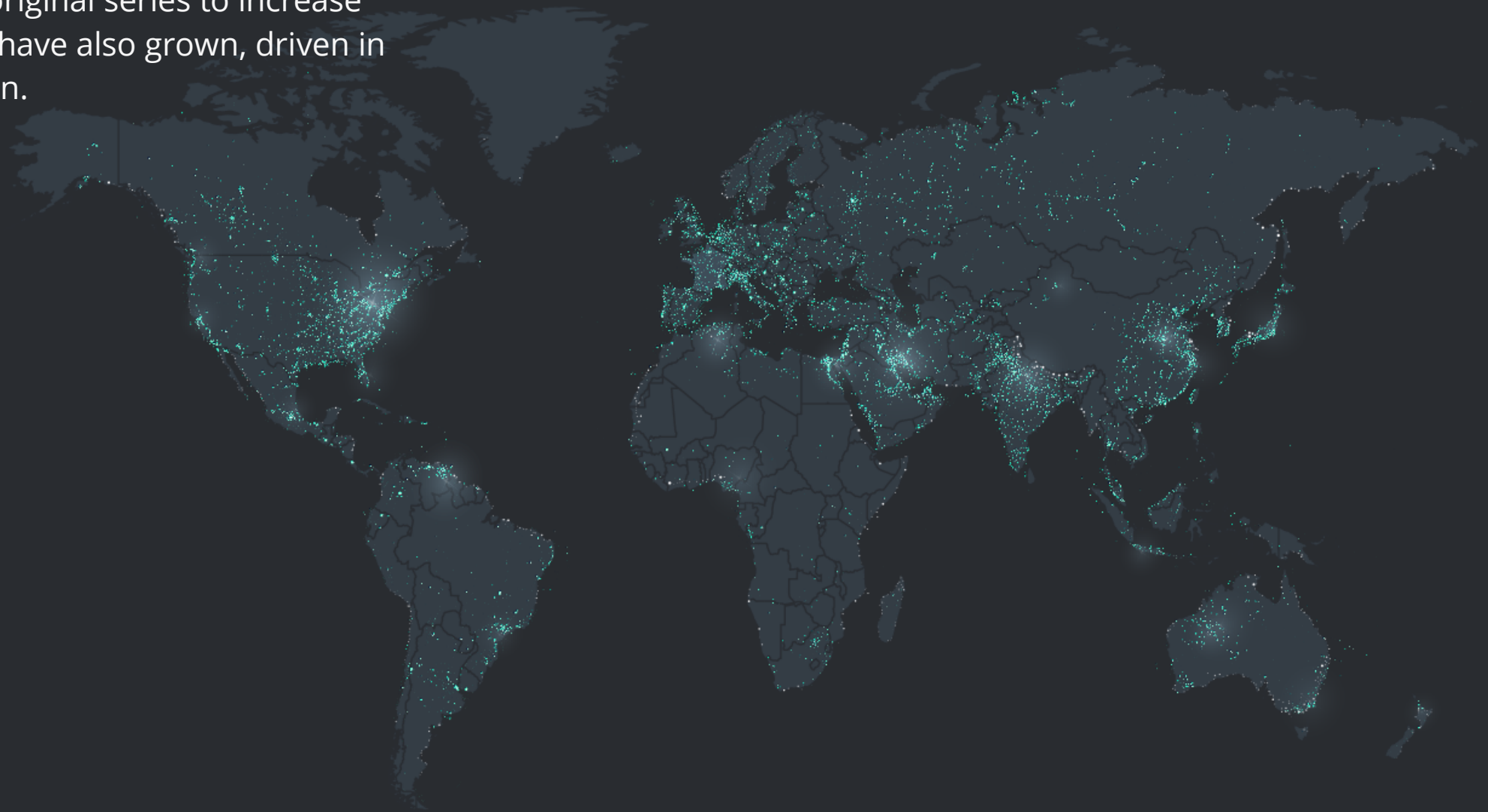
**Download** *Parrot Analytics' comprehensive whitepapers, industry analyses and global TV demand case studies.*



## Global SVOD platform trends

# Investment, production and subscriber growth

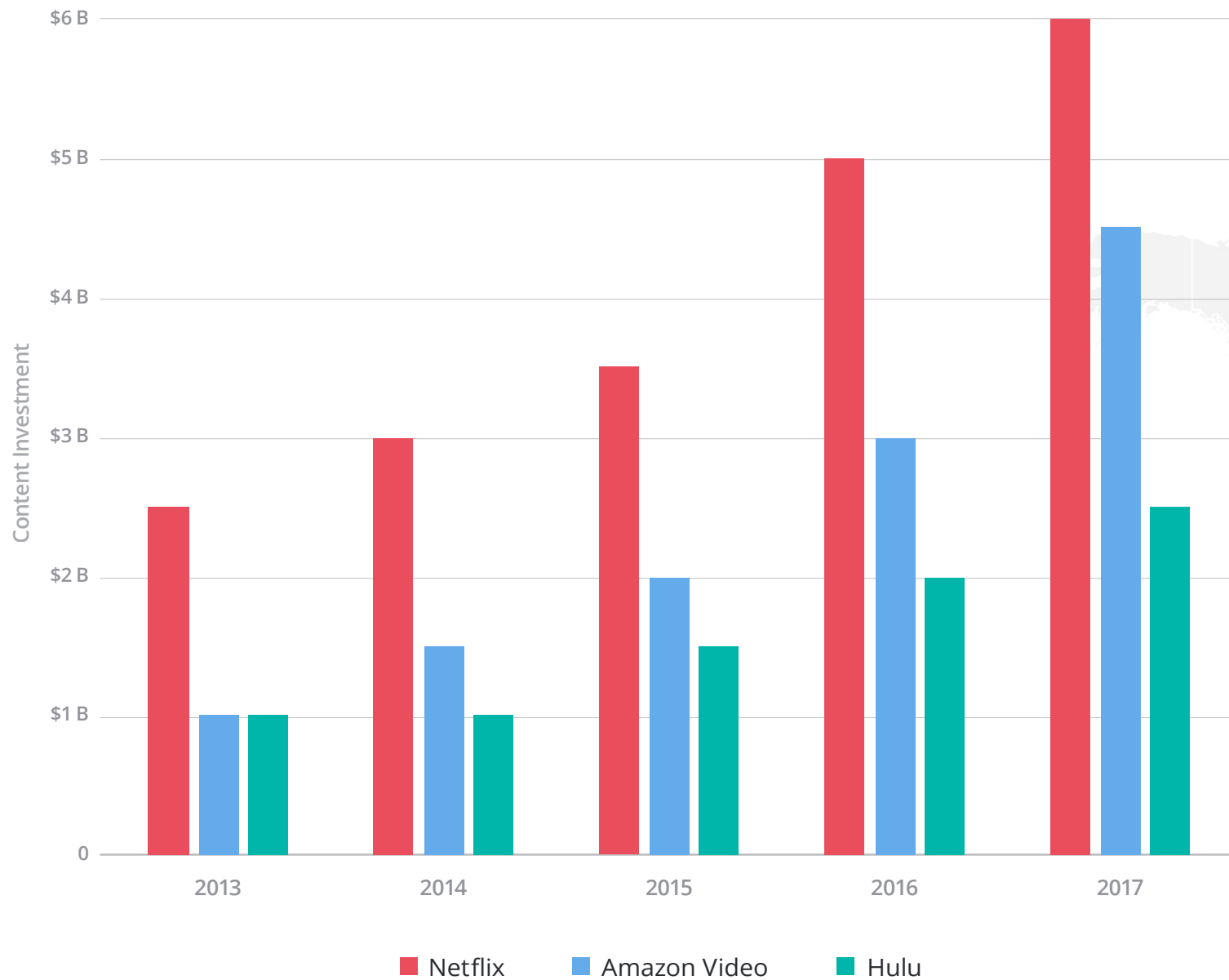
The growth of SVOD platforms over the last five years has been significant. Billions of dollars have been invested in content, resulting in the number of digital original series to increase exponentially year on year. Consequently, platform subscriptions have also grown, driven in part by the global expansion of Netflix and, more recently, Amazon.



# Increase in investment

2013 – 2017 | Content Investment

Content investments by major US SVOD platforms

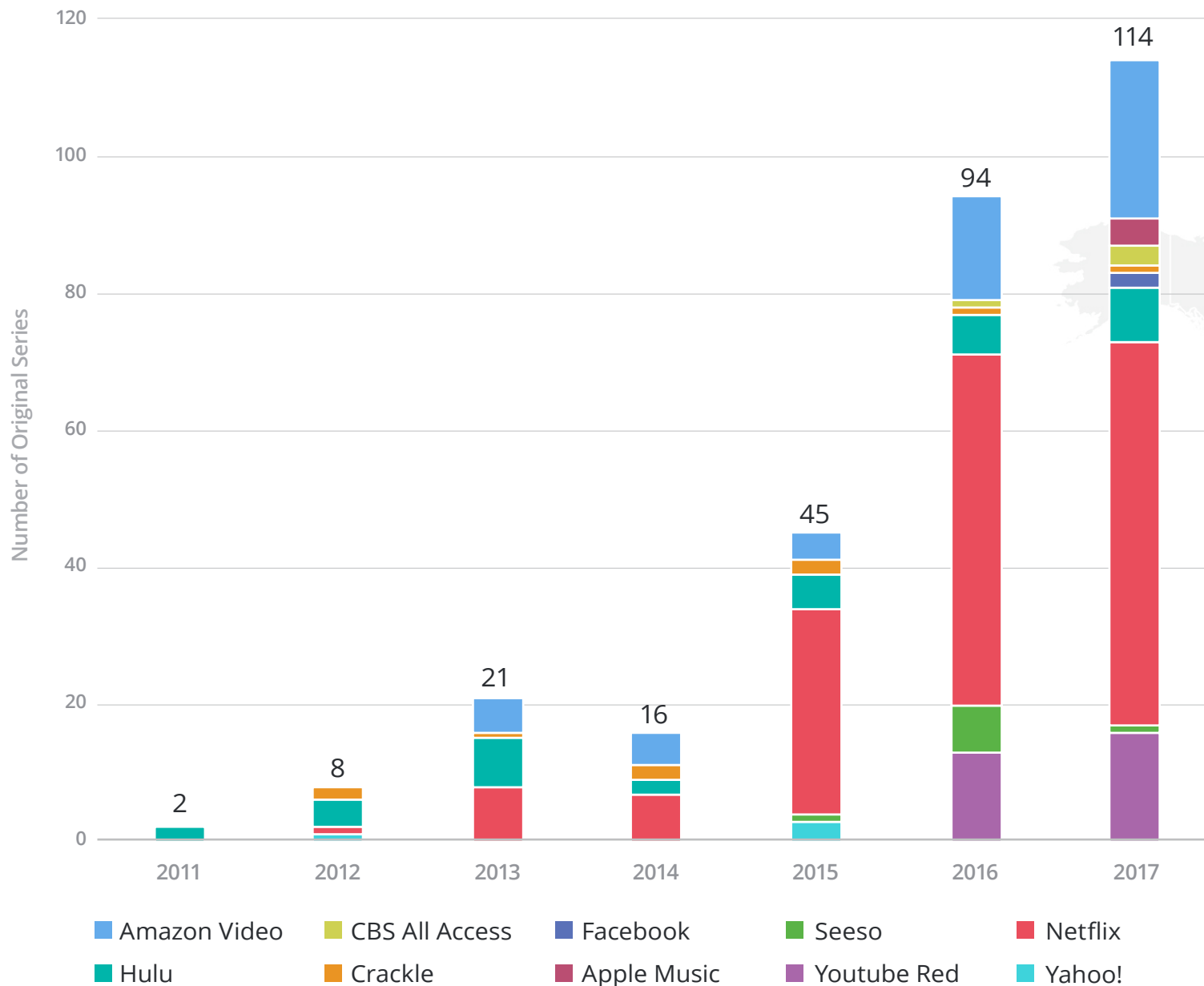


- ▶ From 2013 to 2017, the amount invested in content by the major three SVOD platforms increased from \$5.5 billion to \$13 billion, with no signs of slowing down. While **Amazon** and **Hulu** have not revealed budget estimates for 2018, **Netflix** has stated that it will spend up to \$8 billion with the aim of making half of its catalog original series.
- ▶ **Netflix** has always been the market leader in content spend, but **Amazon** and **Hulu** are catching up. At CES, **Hulu's** CEO Randy Freer claimed that their content library of original and acquired content will be worth around \$20 to \$30 billion, much of it likely from the platform's owners NBCUniversal, Disney, and Time Warner.
- ▶ **Amazon** recently spent \$250 million for the rights for a *Lord of the Rings* series, and will likely spend millions more developing and producing it in their search for "the next *Game of Thrones*."

# Increase in the number of digital original shows

2011 – 2017 | Total Number of New Digital Original Series

Total number of new digital original series released each year

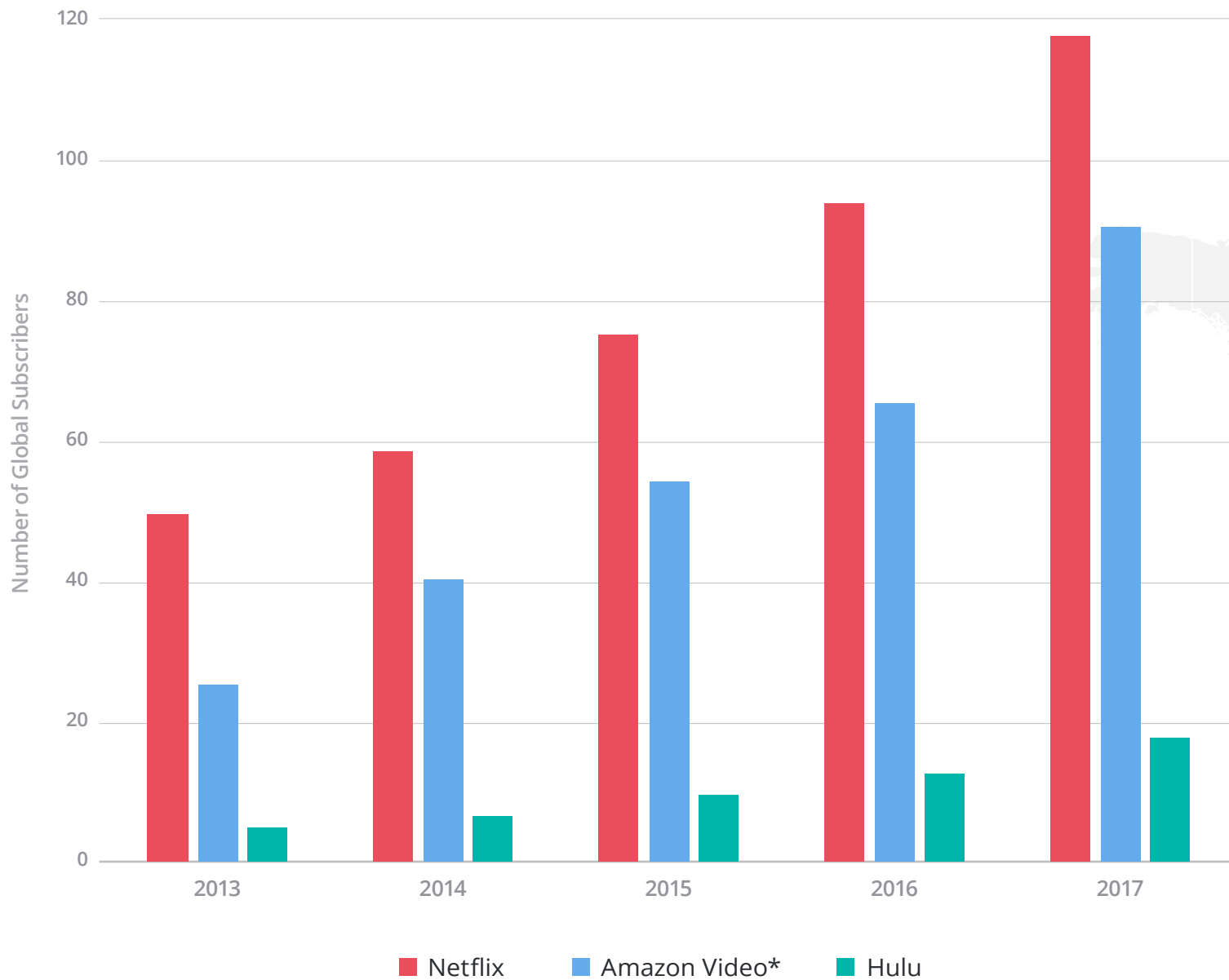


- ▶ The number of digital original series has increased exponentially as a result of the increasing investment. From two small-scale **Hulu** series - the news show *The Morning After* and the documentary series *A Day in the Life* — in 2011, the list of new titles aired exclusively online first has grown to over 100 in 2017.
- ▶ Because of the nature of online distribution, older shows remain as available as new titles to viewers, meaning that the total number of digital originals that viewers can access is around 300.
- ▶ From 2014 onward, the majority of new digital original series have been released on **Netflix**. However, in the past two years **Amazon** has significantly increased its output, **YouTube Red** has entered the scene with about 14% of shows each year, and new platforms backed by big technology companies — **Apple Music** and **Facebook Watch** — have released their first series.
- ▶ The “homes” for digital original series are likely going to grow even more diverse in the future.

# Increase in subscribers

2013 - 2017 | Number of Global Subscribers

Number of global subscribers for major US SVOD platforms

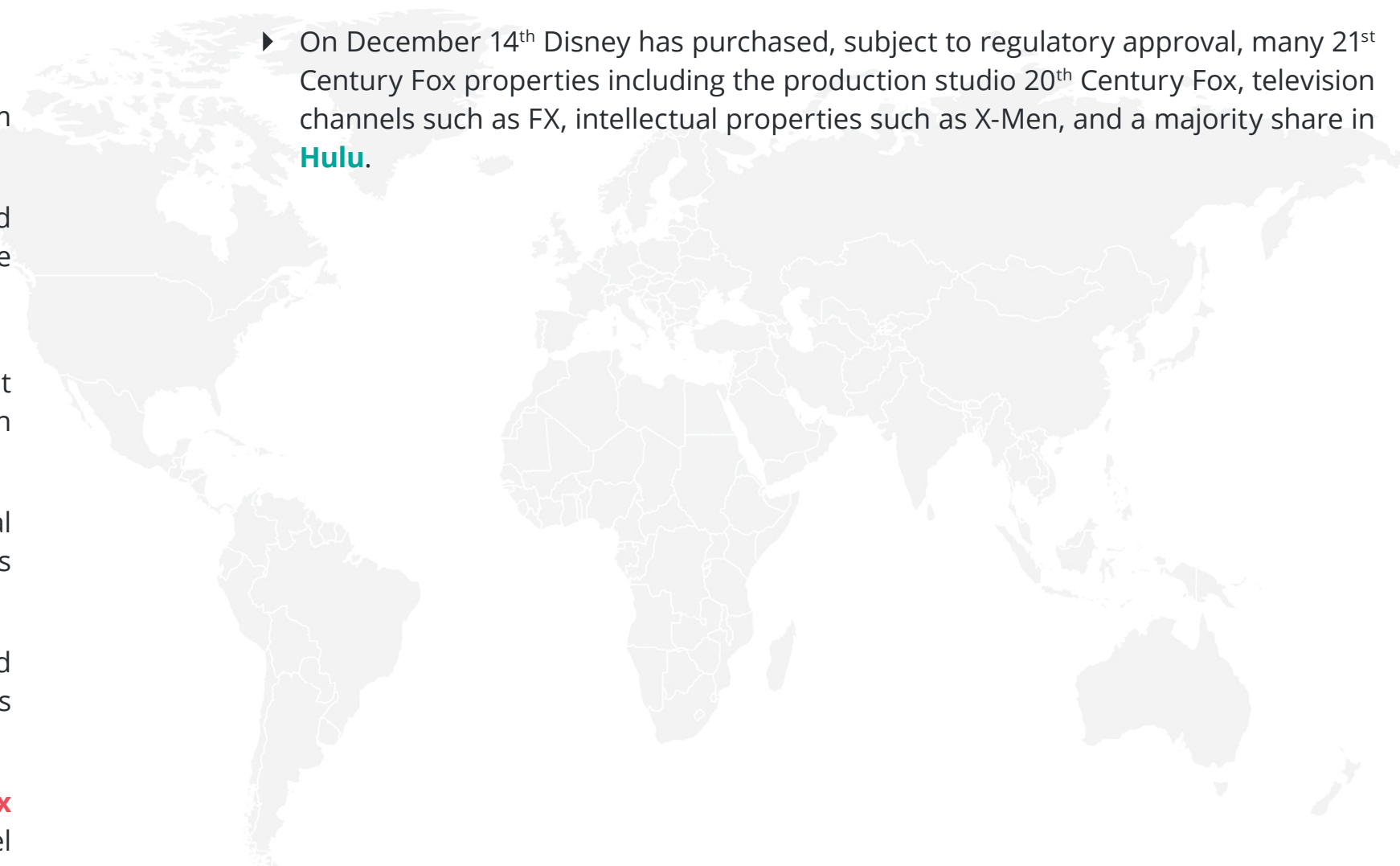


- ▶ More investment and more titles have succeeded in growing the subscriber base for these platforms. This year, **Netflix** surpassed 100 million subscribers worldwide.
- ▶ **Amazon Prime** was estimated to have reached 90 million subscribers in 2017 (although Amazon does not release exact values), though with many services under the Prime umbrella, it is hard to say how many of these people use the **Amazon Video** service, which as of 2016 is available worldwide.
- ▶ **Hulu**, only available in the US and Japan, naturally has fewer subscribers, but grew year-on-year in the US by over 40%, spurred by recent hits such as *The Handmaid's Tale*.
- ▶ Of these platforms, **Hulu** is the cheapest at \$8 a month in the US, though **Amazon** is comparable at \$99 a year.
- ▶ **Netflix** recently increased its price to be \$11 for its standard plan in the US. This price increase did not seem to impact its subscriber numbers, and we expect all three platforms to grow again in 2018.



# Major SVOD platform events in 2017

January–December, 2017

- 
- Q1**
- ▶ The 74th Golden Globes on January 8<sup>th</sup> saw several wins for digital original series. Netflix's *The Crown* won for both Best Television Series (Drama) and Best Actress (Drama) with Claire Foy, and Amazon's *Goliath* won for Best Actor (Drama) with Billy Bob Thornton.
  - ▶ The **Netflix** teen series *13 Reasons Why* was released on March 31<sup>st</sup>, sparking controversy and conversations worldwide about suicide and self-harm.
- Q2**
- ▶ *The Handmaid's Tale* began airing on **Hulu** in late April, immediately garnering acclaim from critics for its timely themes.
  - ▶ **Netflix** cancelled two high-profile (and expensive) series: *The Get Down* in May and *Sense8* in June. However, due to fan backlash Netflix later announced a special finale episode of *Sense8* to air in 2018.
- Q3**
- ▶ Facebook launched its VOD service, **Facebook Watch**, on August 10<sup>th</sup>. With content that is free to watch and primarily produced by content partners, its main competition is YouTube rather than SVOD platforms.
  - ▶ The 69<sup>th</sup> Primetime Emmys on September 18<sup>th</sup> proved to be historic for digital original series: *The Handmaid's Tale* was the first SVOD title to win in both the Best Series (Drama) and Lead Actress (Drama) categories.
  - ▶ *Star Trek: Discovery* premiered on **CBS All Access** as the first series developed specifically for the service. The series drove the platform's biggest month of signups yet.
  - ▶ In August, Shonda Rhimes signed a deal moving her future shows from ABC to **Netflix** and in September, Disney decided to move its films, including Star Wars and Marvel titles, from Netflix in order to release them on its own upcoming platform.
- Q4**
- ▶ **Apple** announced that it would enter the world of scripted original content by commissioning a drama starring Jennifer Aniston and Reese Witherspoon, as well as a reboot of the anthology series *Amazing Stories* by Steven Spielberg and Bryan Fuller.
  - ▶ **Seeso** was shut down by NBCUniversal on November 8<sup>th</sup> after nearly two years of operation.
  - ▶ On December 14<sup>th</sup> Disney has purchased, subject to regulatory approval, many 21<sup>st</sup> Century Fox properties including the production studio 20<sup>th</sup> Century Fox, television channels such as FX, intellectual properties such as X-Men, and a majority share in **Hulu**.

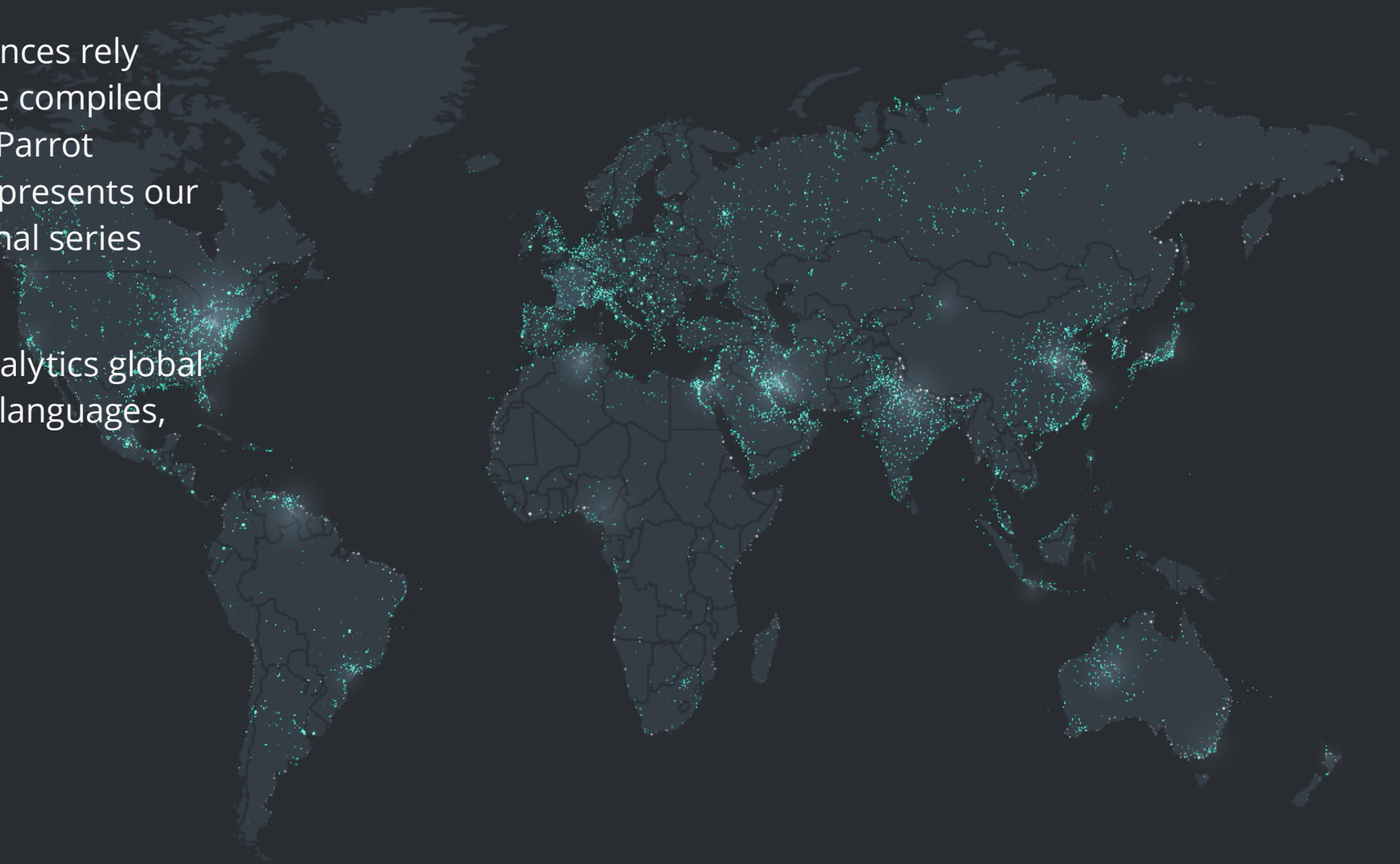
## Market-specific TV content trends

January–December, 2017

# Audience discovery, platform, genre and title demand trends in 10 global markets

In this next section we highlight the various sources of information that audiences rely on to express their demand for new content online, as well as offline. We have compiled this information from a **comprehensive multi-language survey** carried out by Parrot Analytics involving 10,000 participants in **10 global markets**. This section also presents our latest **global TV demand trends** of SVOD platforms' market share, digital original series popularity and genre demand trends in each of the 10 markets examined.

The Global Television Demand Report leverages the entire available Parrot Analytics global TV demand dataset, which is comprised of **3.3 trillion data points**, across 60+ languages, for 100+ countries.

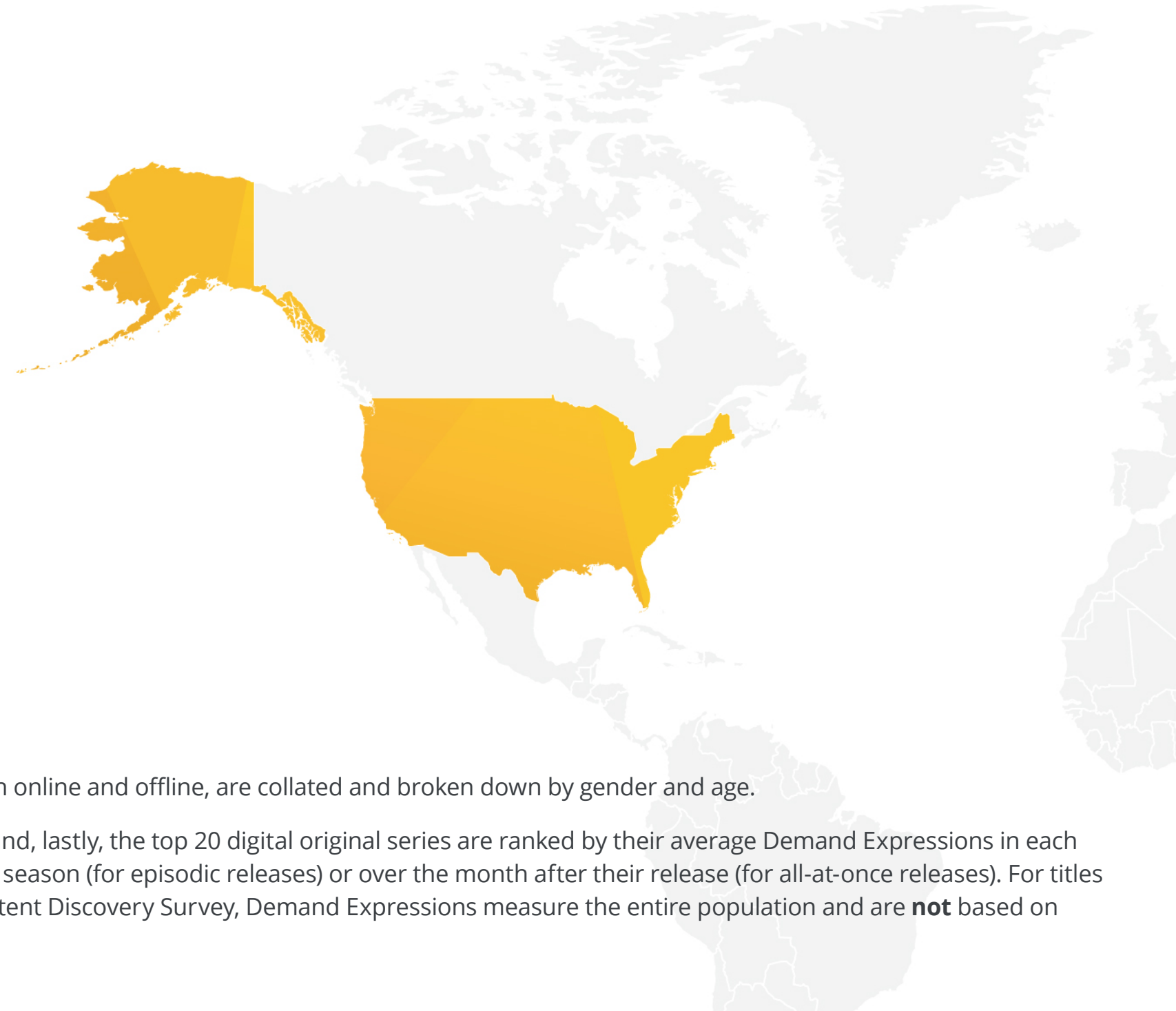


# Audience discovery, platform, genre and title demand trends

January–December, 2017

## United States

Learn how new TV shows are discovered and how this audience engagement and online activity drives demand for Digital Original series in the United States.



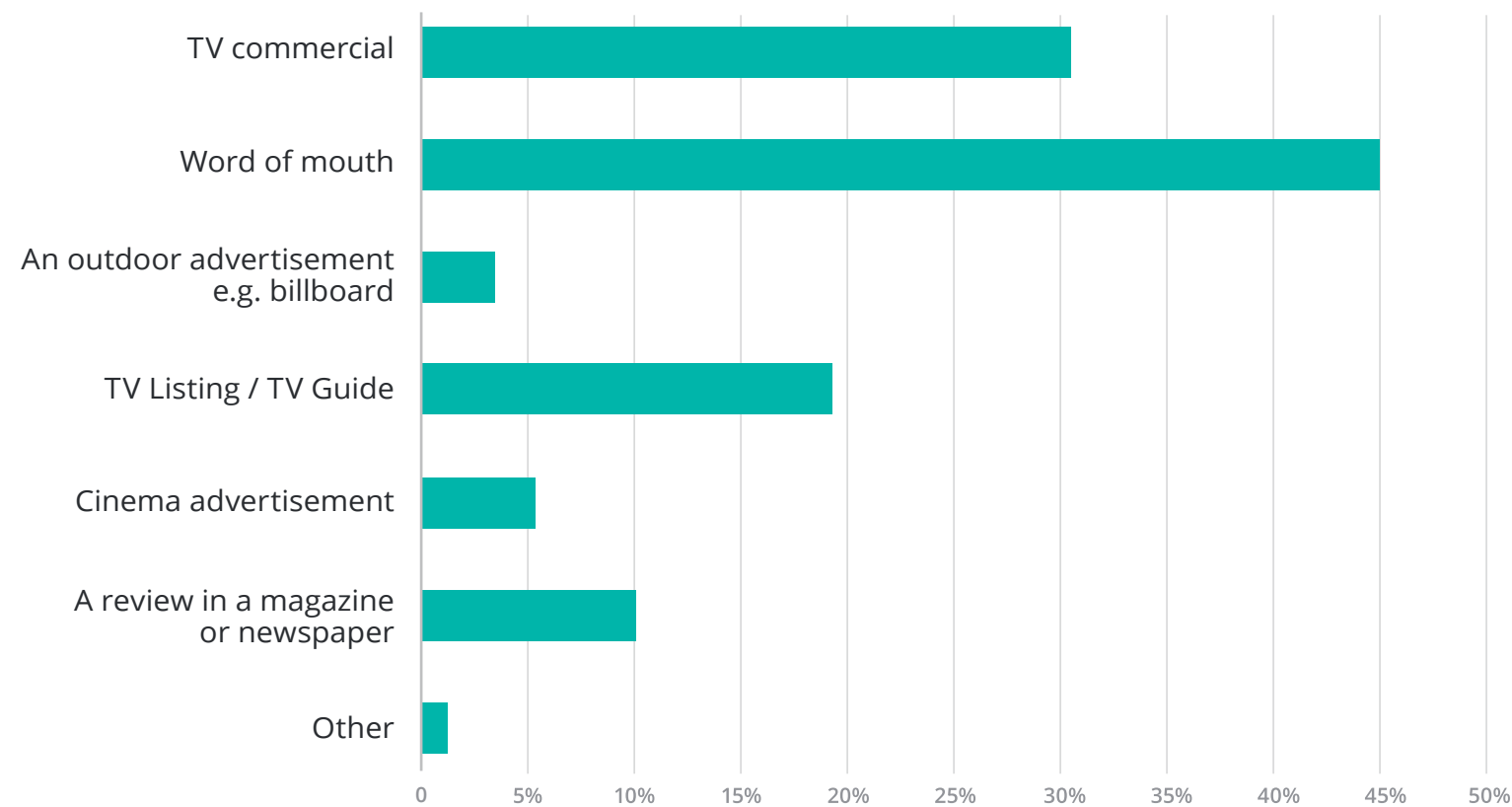
Based on our representative survey, the methods by which people discover new television series, both online and offline, are collated and broken down by gender and age.

The total demand by platform and by genre for SVOD digital original series are tracked over the year and, lastly, the top 20 digital original series are ranked by their average Demand Expressions in each of the ten markets. For titles that aired new episodes in 2017, their demand was averaged during their season (for episodic releases) or over the month after their release (for all-at-once releases). For titles that did not air during 2017, their demand over the entire year was averaged. Unlike the Audience Content Discovery Survey, Demand Expressions measure the entire population and are **not** based on panel data.

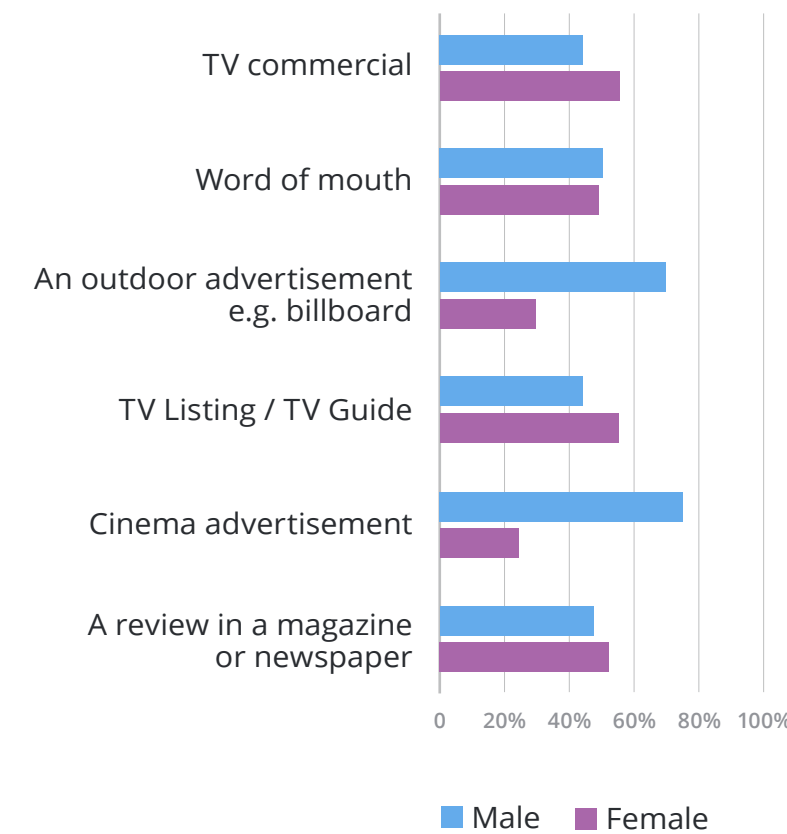
# How audiences discover content **offline** in **the United States**

December, 2017

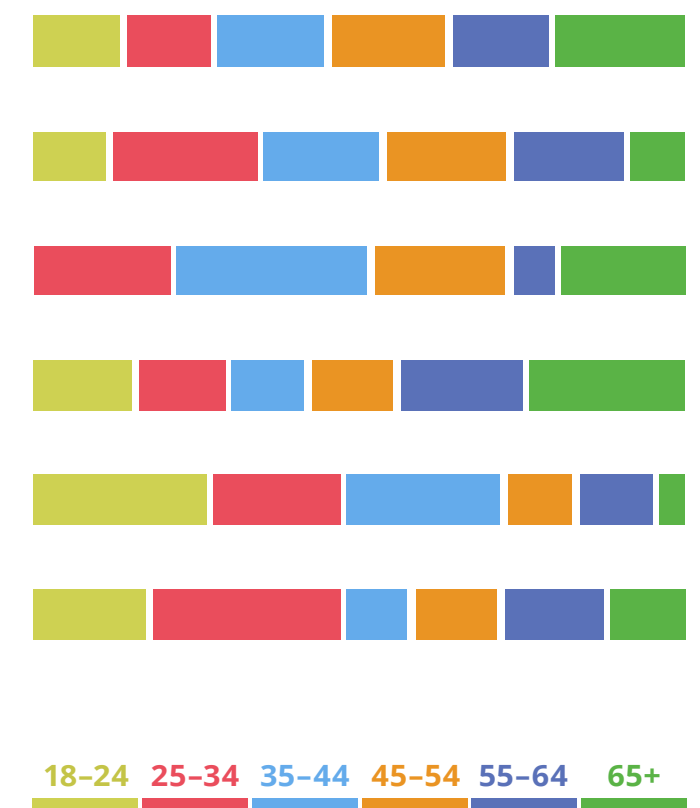
Methods of offline television show discovery in 2017



Breakdown by gender



Breakdown by age



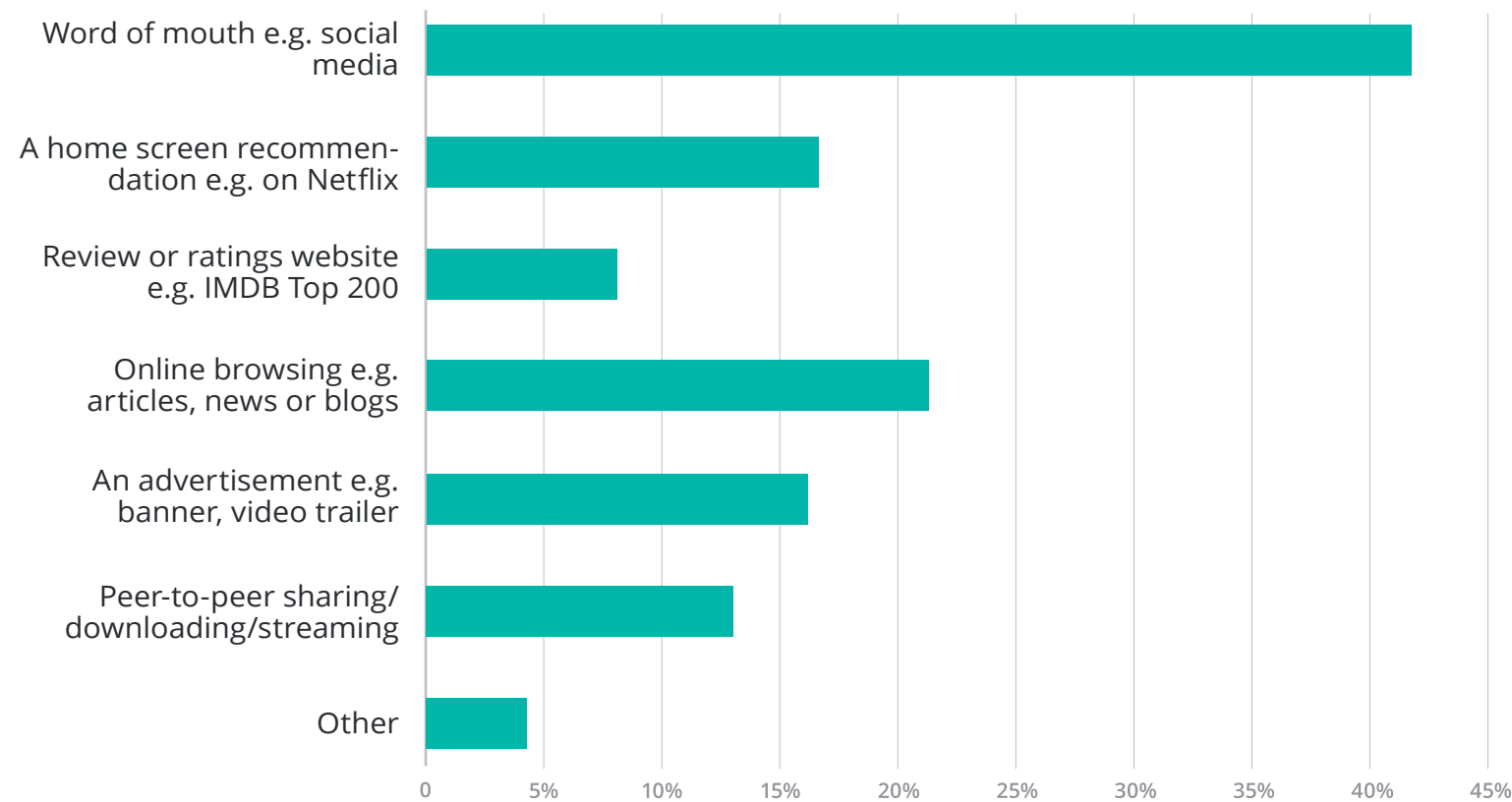
► Offline, people in the United States tend to find out about new television series via word of mouth: 45% of people discover new shows from their friends, family, and acquaintances.

► Commercials on television, which are a common method for women, are more effective than cinema or outdoor advertising, which is a more common method of discovery with men.

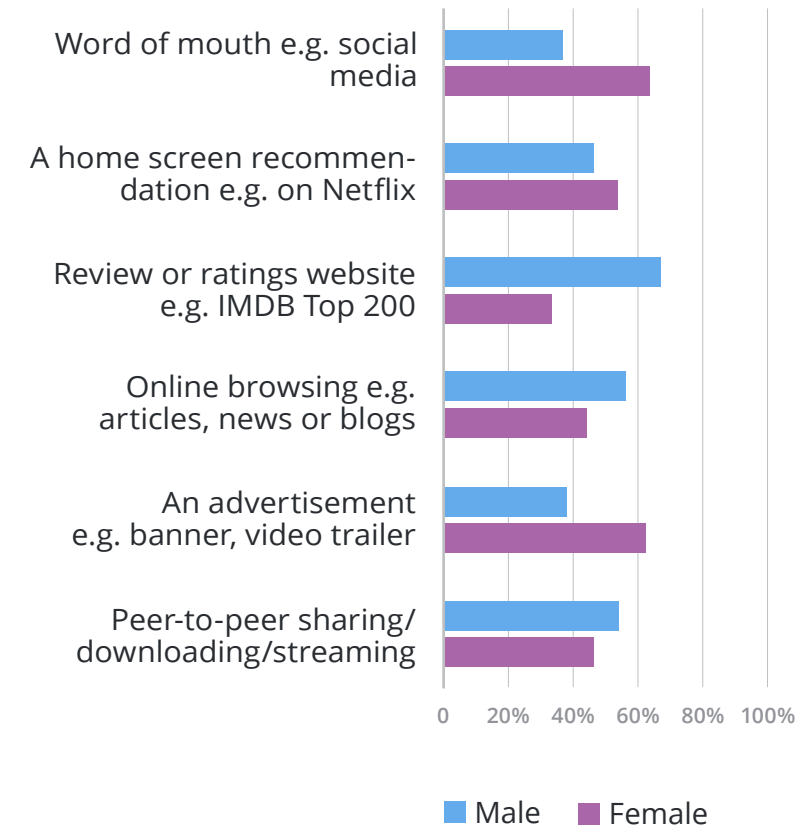
# How audiences discover content online in the United States

December, 2017

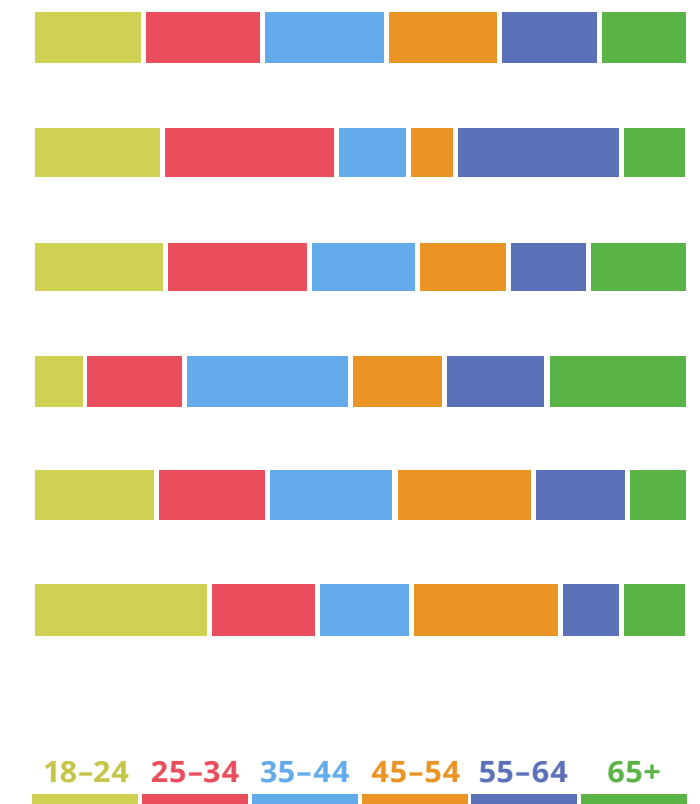
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Breakdown by gender



Breakdown by age



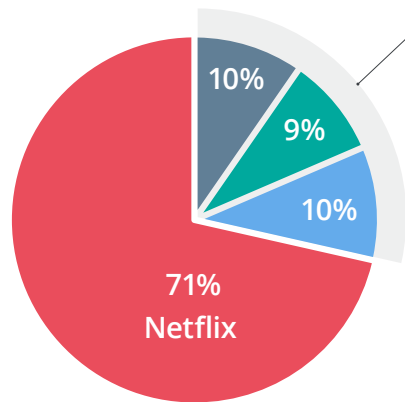
► Word of mouth — hearing about a new series from friends online — dominates the methods by which people discover content online as well as offline.

► This method is common across all age brackets, but women are more likely to find new shows via word of mouth than men.

# Demand trends in the United States

January–December, 2017 | Total Demand Expressions

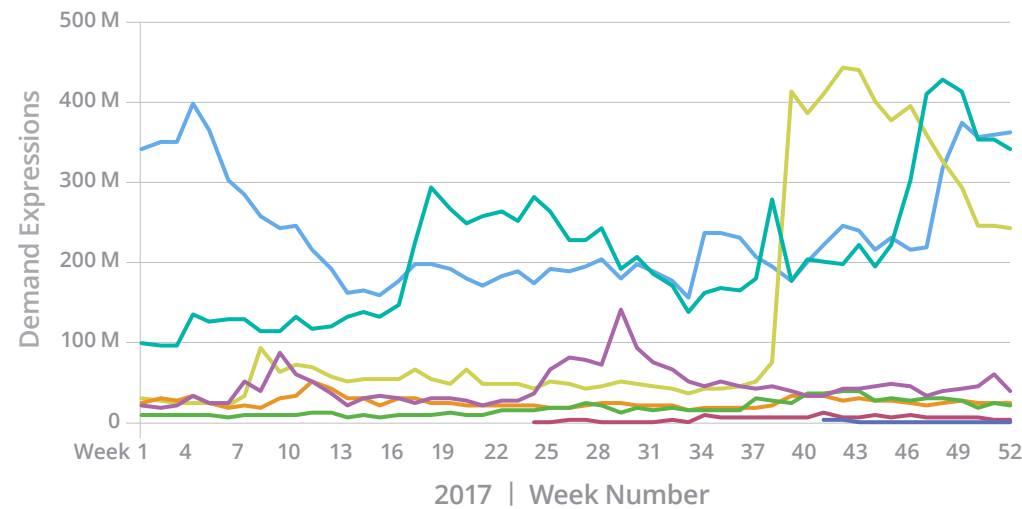
Total share of demand for platforms in 2017



Other Platforms

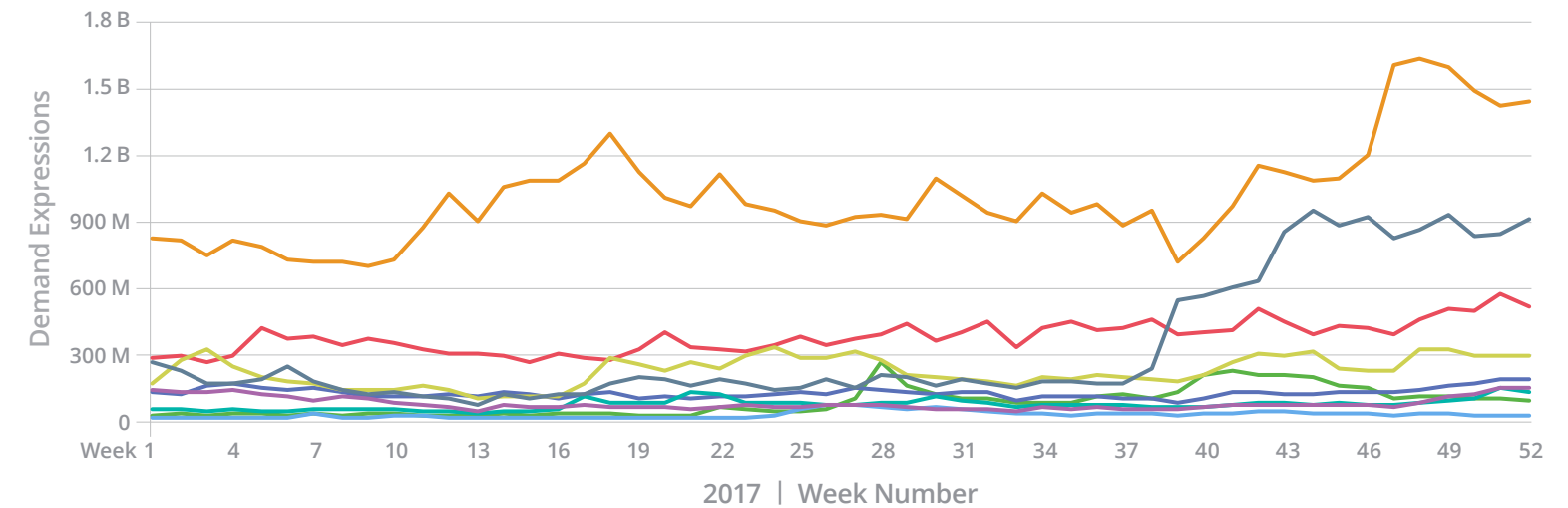
(CBS All Access, Crackle, Facebook, Apple Music, Seeso, Youtube Red)

Total platform demand in 2017 (ex. Netflix)



- Amazon Video
- CBS All Access
- Facebook
- Seeso
- Hulu
- Crackle
- Apple Music
- Youtube Red

Total genre demand for digital original series in 2017



- Animation
- Comedy
- Documentary
- Horror
- Reality
- Children
- Comedy-drama
- Drama
- Science Fiction

- ▶ *Stranger Things* was the most popular digital original series in the United States in 2017, followed by new release *13 Reasons Why*. The third-most popular show, *Star Trek: Discovery*, single-handedly increased the demand for CBS All Access to be greater than the total demand for Amazon and Hulu titles following its release in September.
- ▶ With over 50 new titles released in 2017 alone, Netflix accounted for over 70% of the total demand for digital original series. Amazon, Hulu, and all other platforms accounted for an equal amount of demand with 10% each.

- ▶ The demand for dramas started the year twice as high as any other genre and its lead only increased throughout 2017. Comedy was the second-most popular genre, but science fiction surpassed it with the release of the second season of *Stranger Things* and *Star Trek: Discovery*.
- ▶ Apple's most popular series, *Carpool Karaoke*, was more than twice as in-demand as Facebook's *Humans of New York*.

# Top digital original series in the United States

January–December, 2017 | Average Daily Demand Expressions

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

				Avg. Demand Expressions	
1	<i>Stranger Things</i>	Netflix	Science Fiction	58,867,391	
2	<i>13 Reasons Why</i>	Netflix	Drama	50,002,509	
3	<i>Star Trek: Discovery</i>	CBS All Access	Science Fiction	44,805,580	
4	<i>Mindhunter</i>	Netflix	Drama	35,402,896	
5	<i>Marvel's The Punisher</i>	Netflix	Drama	34,705,249	
6	<i>Ozark</i>	Netflix	Drama	28,951,263	
7	<i>Marvel's Iron Fist</i>	Netflix	Drama	26,954,193	
8	<i>Orange Is The New Black</i>	Netflix	Comedy-drama	25,687,203	
9	<i>The Crown</i>	Netflix	Drama	23,336,195	
10	<i>Marvel's Runaways</i>	Hulu	Drama	20,384,409	
11	<i>Dark</i>	Netflix	Science Fiction	20,279,300	
12	<i>The Handmaid's Tale</i>	Hulu	Drama	19,620,702	
13	<i>Black Mirror</i>	Netflix	Science Fiction	19,209,127	
14	<i>Narcos</i>	Netflix	Drama	18,171,488	
15	<i>Castlevania</i>	Netflix	Animation	18,137,196	
16	<i>A Series Of Unfortunate Events</i>	Netflix	Comedy-drama	17,012,795	
17	<i>Godless</i>	Netflix	Drama	15,177,230	
18	<i>Marvel's The Defenders</i>	Netflix	Drama	15,166,623	
19	<i>House Of Cards</i>	Netflix	Drama	14,891,732	
20	<i>Santa Clarita Diet</i>	Netflix	Comedy	14,652,888	

## A selection of 5 additional digital original series of interest in the United States:

32	<i>Escape The Night</i>	YouTube Red	Horror	7,043,396	
72	<i>Harmonquest</i>	Seeso	Comedy	3,468,861	
83	<i>Snatch</i>	Crackle	Comedy-drama	2,540,312	
131	<i>Carpool Karaoke</i>	Apple Music	Reality	993,663	
161	<i>Humans Of New York: The Series</i>	Facebook	Documentary	407,134	

# Audience discovery, platform, genre and title demand trends

January–December, 2017

## United Kingdom

Learn how new TV shows are discovered and how this audience engagement and online activity drives demand for Digital Original series in the United Kingdom.

Based on our representative survey, the methods by which people discover new television series, both online and offline, are collated and broken down by gender and age.

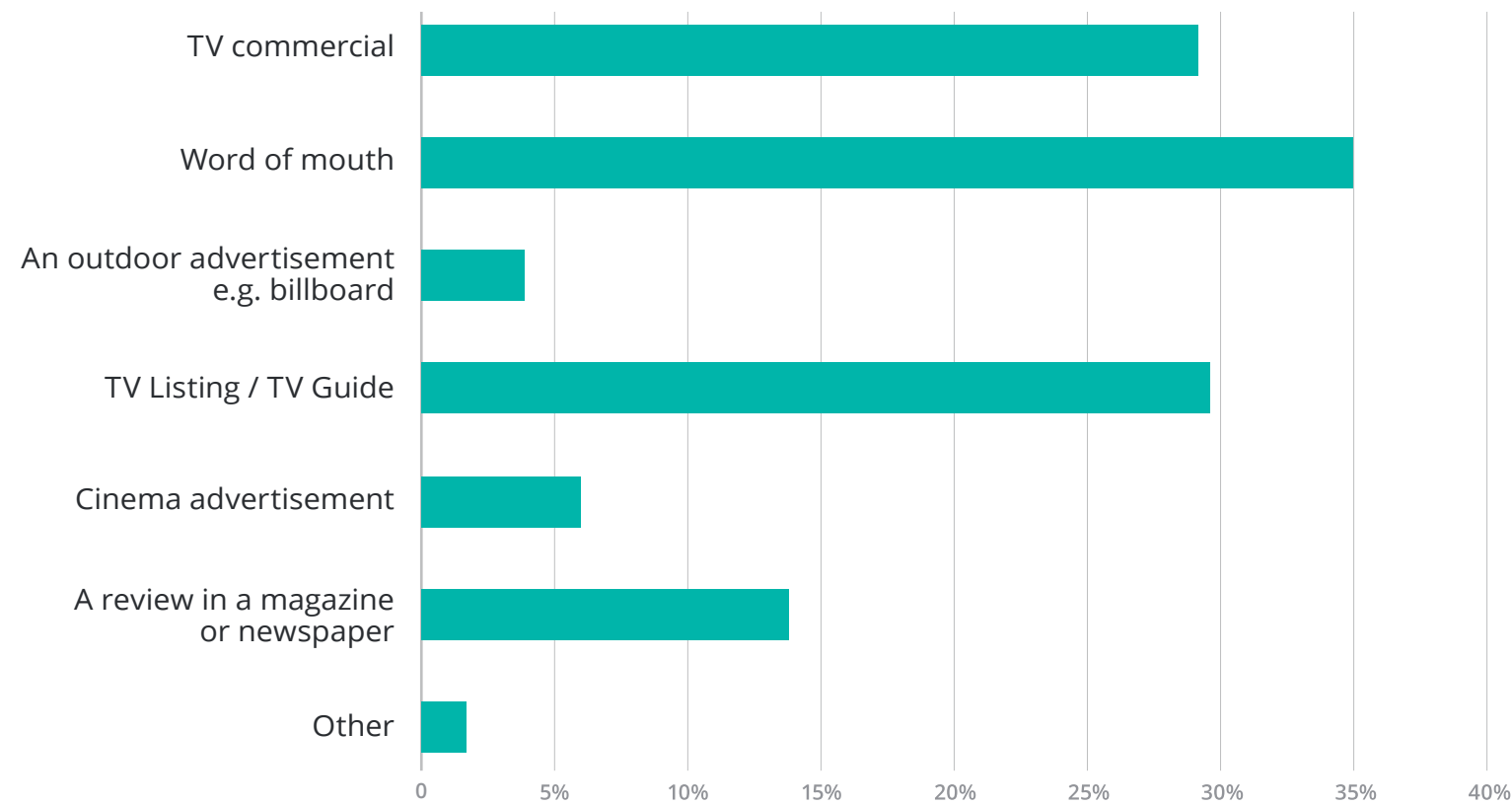
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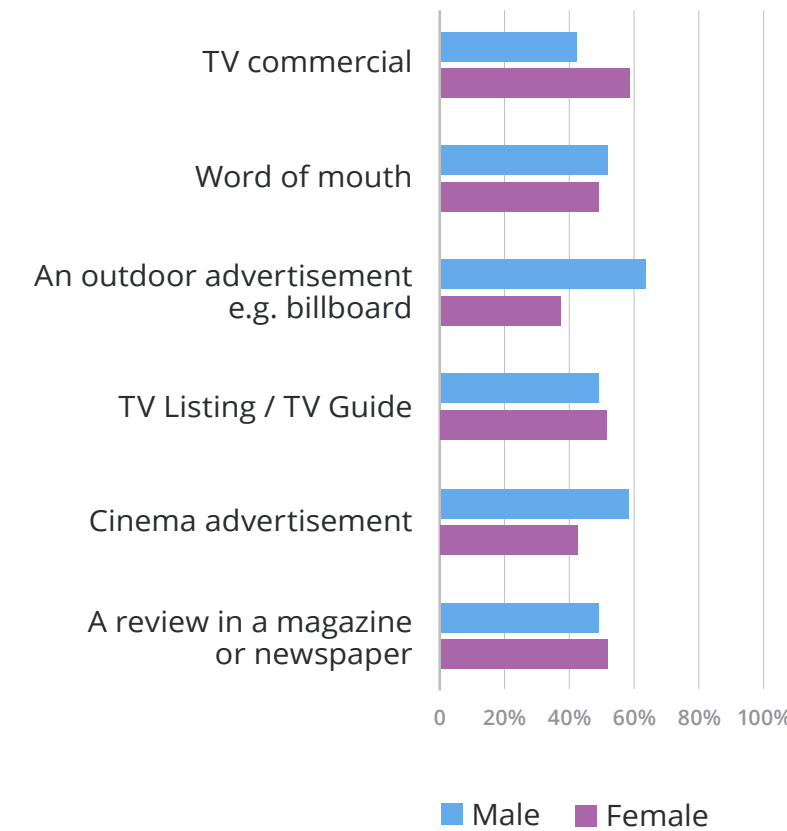
# How audiences discover content **offline** in **the United Kingdom**

December, 2017

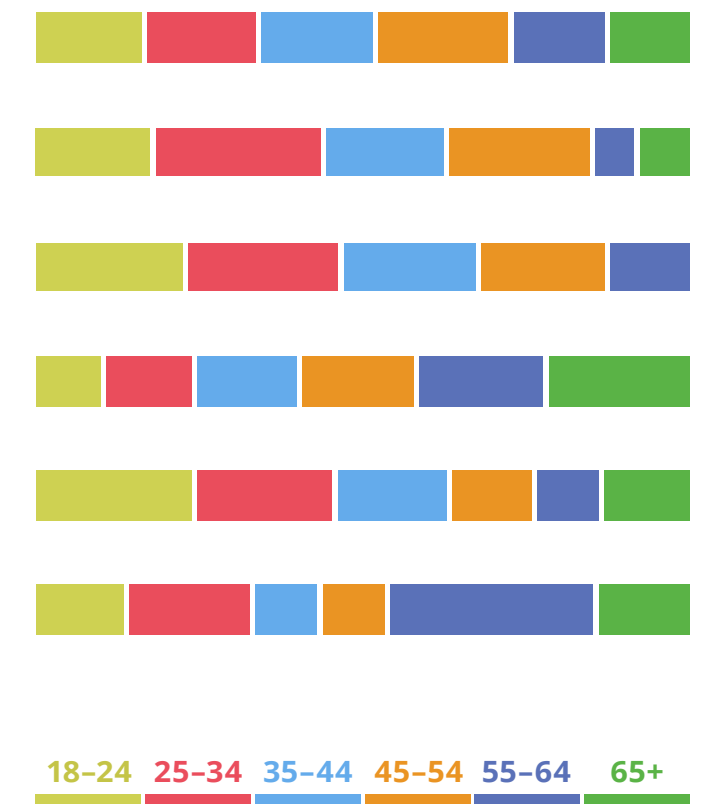
Methods of offline television show discovery in 2017



Breakdown by gender



Breakdown by age



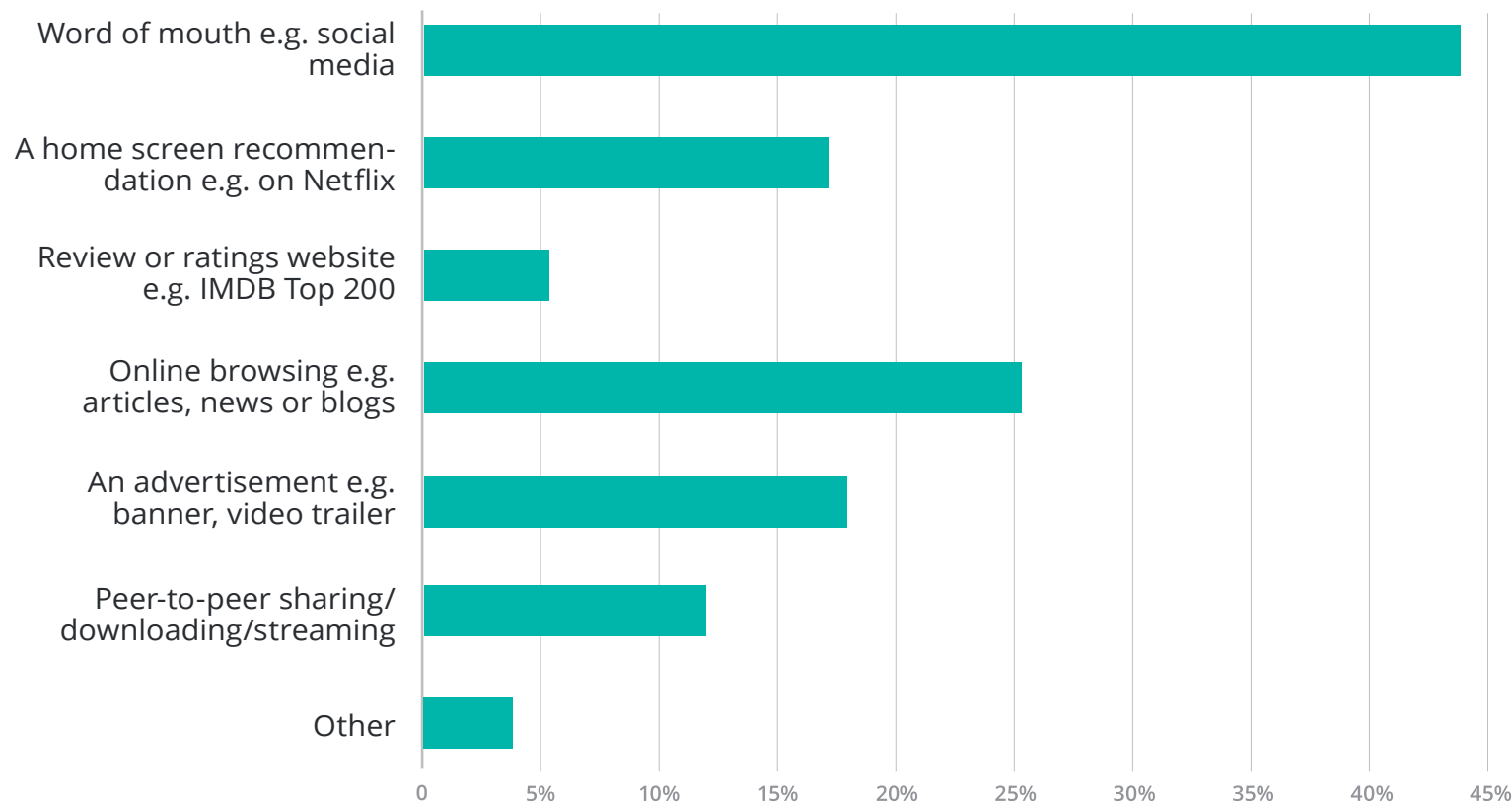
► In the United Kingdom, word of mouth is the most common method by which people discover new content, but both television adverts and listings or guides were used by nearly 30% of people.

► People aged 55 to 64 are most likely to find new shows from reviews in magazines or newspapers.

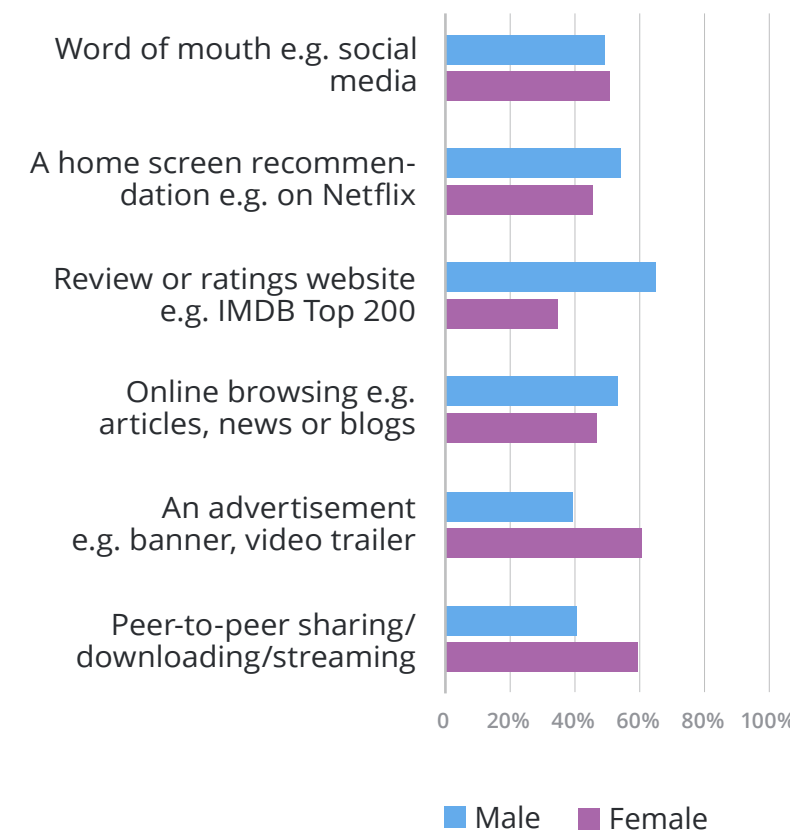
# How audiences discover content online in the United Kingdom

December, 2017

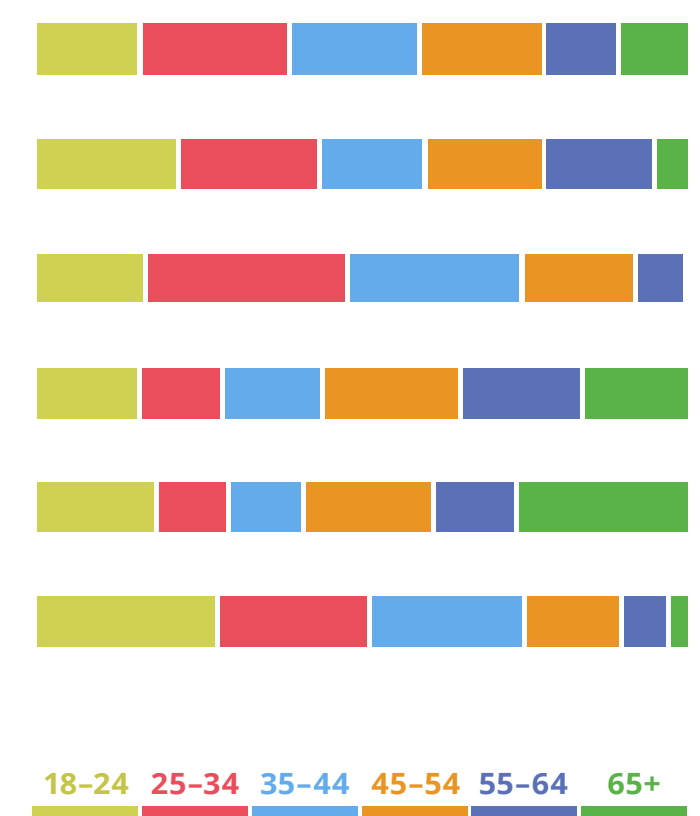
Methods of online television show discovery in 2017



Breakdown by gender



Breakdown by age



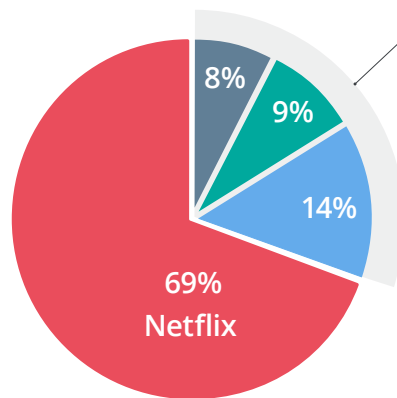
▶ Online, word of mouth is also the leading source of discovering new content, with about 44% of people using it.

▶ While people aged 18 to 24 are more likely to discover new TV shows using peer-to-peer networks, people aged 25 to 34 are more likely to go to reviews or ratings websites instead.

# Demand trends in the United Kingdom

January–December, 2017 | Total Demand Expressions

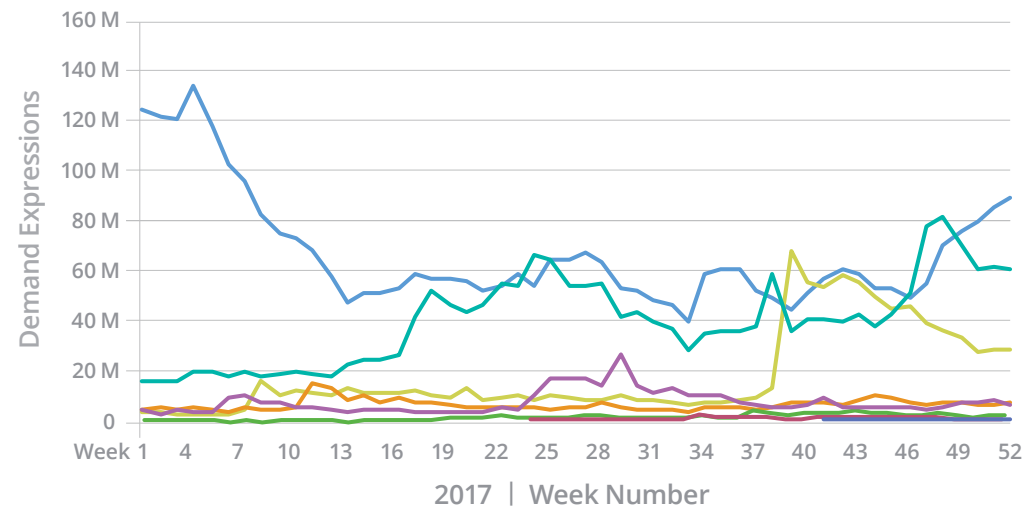
Total share of demand for platforms in 2017



Other Platforms

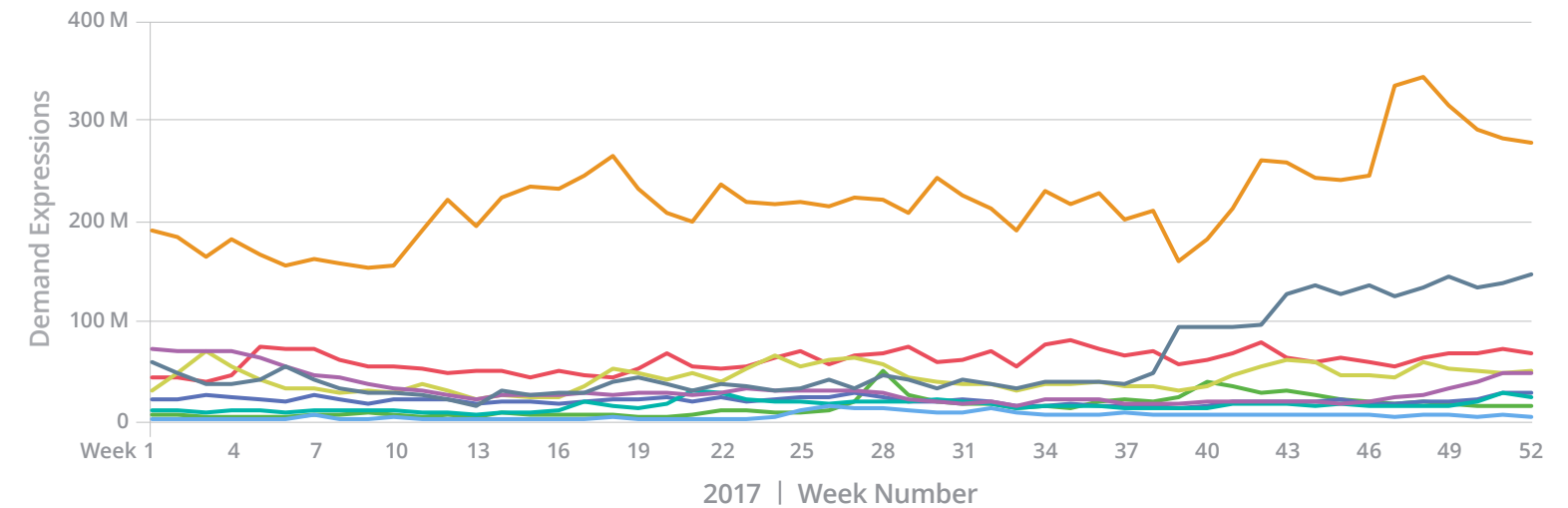
(CBS All Access, Crackle, Facebook, Apple Music, Seeso, Youtube Red)

Total platform demand in 2017 (ex. Netflix)



- Amazon Video
- CBS All Access
- Facebook
- Seeso
- Hulu
- Crackle
- Apple Music
- Youtube Red

Total genre demand for digital original series in 2017



- Animation
- Comedy
- Documentary
- Horror
- Reality
- Children
- Comedy-drama
- Drama
- Science Fiction

- ▶ As in the United States, *Stranger Things* and *13 Reasons Why* were the most popular digital original series in 2017 in the United Kingdom. The first non-Netflix title to rank was CBS All Access' *Star Trek: Discovery* ranked eighth, followed by Amazon's *The Grand Tour* at ninth.
- ▶ Amazon Video, which besides Netflix is the only SVOD platform available in markets outside the US, had 14% of the total digital original series demand. While Hulu and other platforms had only about 8% of demand, these platforms increased their demand over the year to be on par with Amazon in the UK.

- ▶ Drama was the most popular genre in the UK and grew over the course of the year. The reality genre, led by *The Grand Tour*, was relatively high at the beginning of the year but declined, while the science fiction genre grew thanks to *Stranger Things* and *Star Trek: Discovery*.
- ▶ CBS All Access' *Big Brother: Over the Top* had more demand in the UK than Apple's *Carpool Karaoke*.

# Top digital original series in the United Kingdom

January–December, 2017 | Average Daily Demand Expressions

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

				Avg. Demand Expressions	
1	<i>Stranger Things</i>	Netflix	Science Fiction	9,492,293	
2	<i>13 Reasons Why</i>	Netflix	Drama	9,196,485	
3	<i>Mindhunter</i>	Netflix	Drama	8,777,497	
4	<i>Marvel's The Punisher</i>	Netflix	Drama	7,048,178	
5	<i>Marvel's Iron Fist</i>	Netflix	Drama	6,719,154	
6	<i>Ozark</i>	Netflix	Drama	6,658,433	
7	<i>The Crown</i>	Netflix	Drama	5,916,083	
8	<i>Star Trek: Discovery</i>	CBS All Access	Science Fiction	5,433,791	
9	<i>The Grand Tour</i>	Amazon Video	Reality	5,012,729	
10	<i>Orange Is The New Black</i>	Netflix	Comedy-drama	4,941,052	
11	<i>Narcos</i>	Netflix	Drama	4,514,496	
12	<i>The Handmaid's Tale</i>	Hulu	Drama	4,293,372	
13	<i>Marvel's Runaways</i>	Hulu	Drama	4,169,513	
14	<i>A Series Of Unfortunate Events</i>	Netflix	Comedy-drama	4,049,842	
15	<i>Dark</i>	Netflix	Science Fiction	3,603,340	
16	<i>Marvel's The Defenders</i>	Netflix	Drama	3,374,551	
17	<i>Santa Clarita Diet</i>	Netflix	Comedy	3,356,971	
18	<i>Godless</i>	Netflix	Drama	3,305,272	
19	<i>House Of Cards</i>	Netflix	Drama	3,163,666	
20	<i>Castlevania</i>	Netflix	Animation	2,966,595	

## A selection of 5 additional digital original series of interest in the United Kingdom:

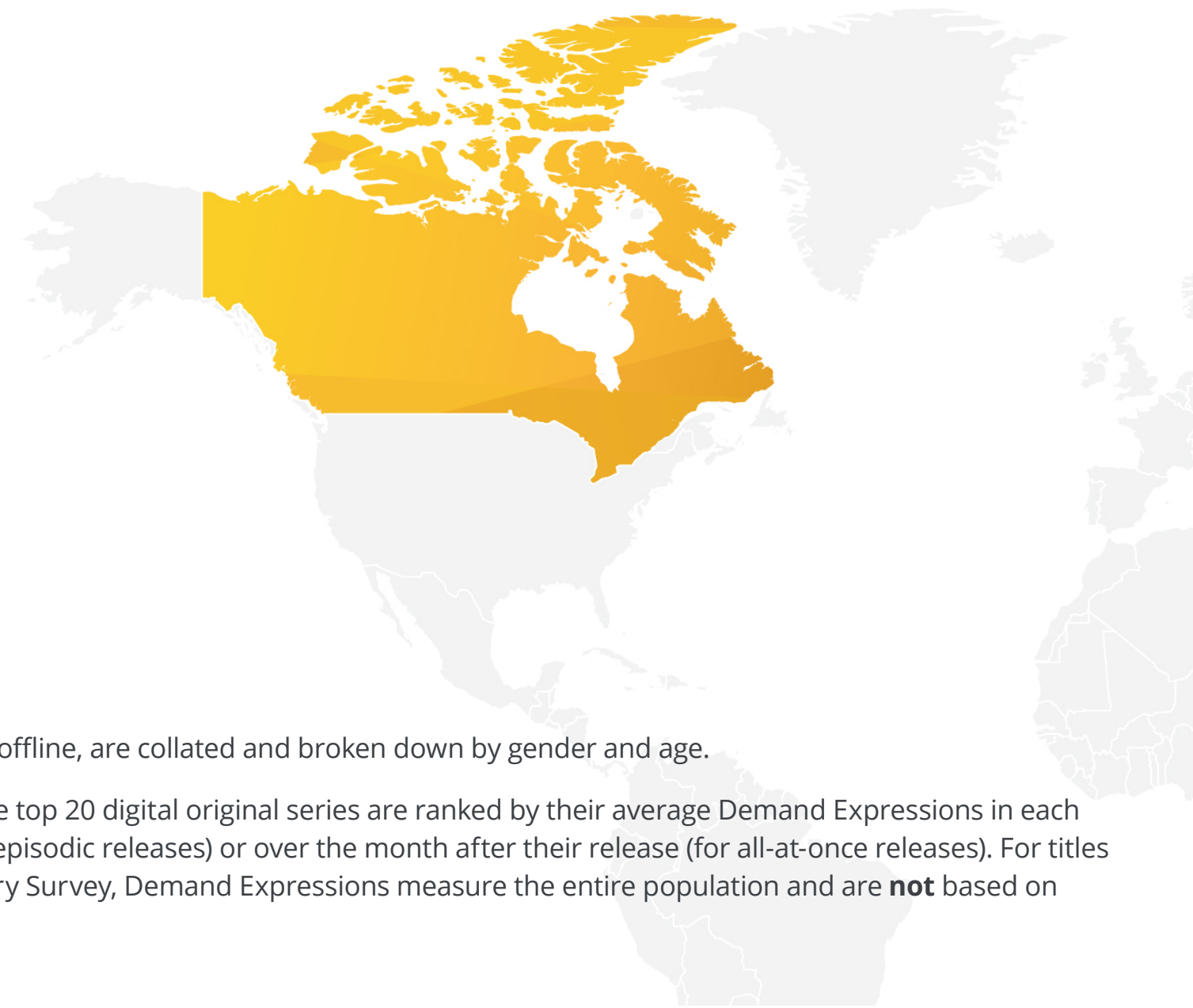
39	<i>Escape The Night</i>	YouTube Red	Horror	1,354,195	
40	<i>The Good Fight</i>	CBS All Access	Drama	1,274,821	
80	<i>StartUp</i>	Crackle	Drama	454,340	
122	<i>Big Brother: Over The Top</i>	CBS All Access	Reality	178,889	
125	<i>Carpool Karaoke</i>	Apple Music	Reality	173,702	

# Audience discovery, platform, genre and title demand trends

January–December, 2017

## Canada

Learn how new TV shows are discovered and how this audience engagement and online activity drives demand for Digital Original series in Canada.



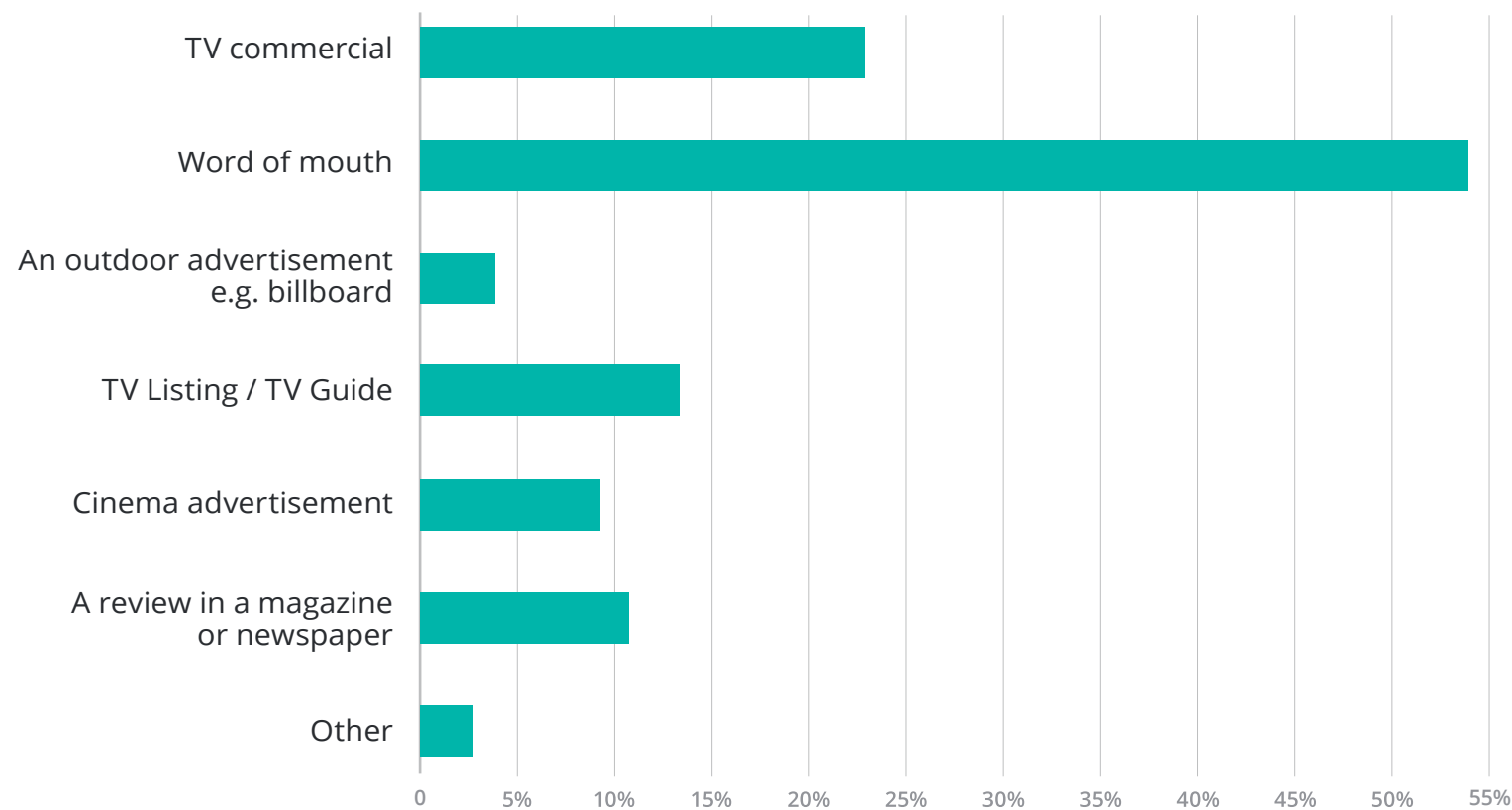
Based on our representative survey, the methods by which people discover new television series, both online and offline, are collated and broken down by gender and age.

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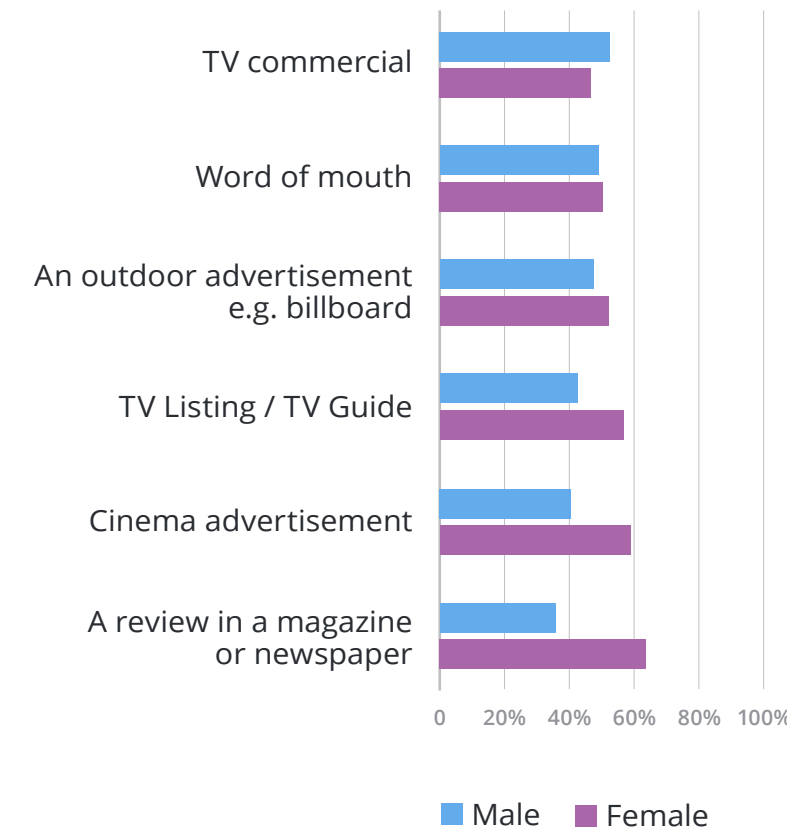
# How audiences discover content **offline** in **Canada**

December, 2017

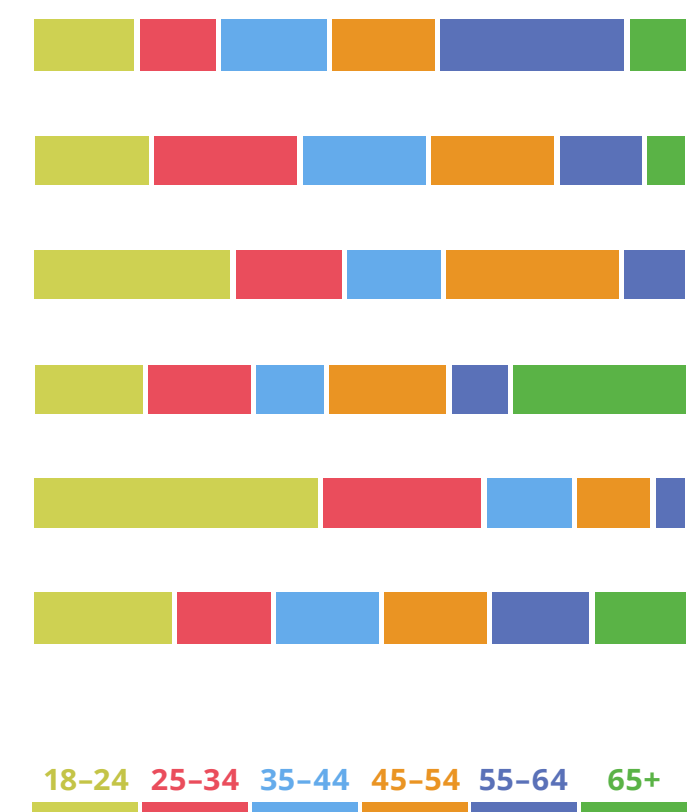
Methods of offline television show discovery in 2017



Breakdown by gender



Breakdown by age



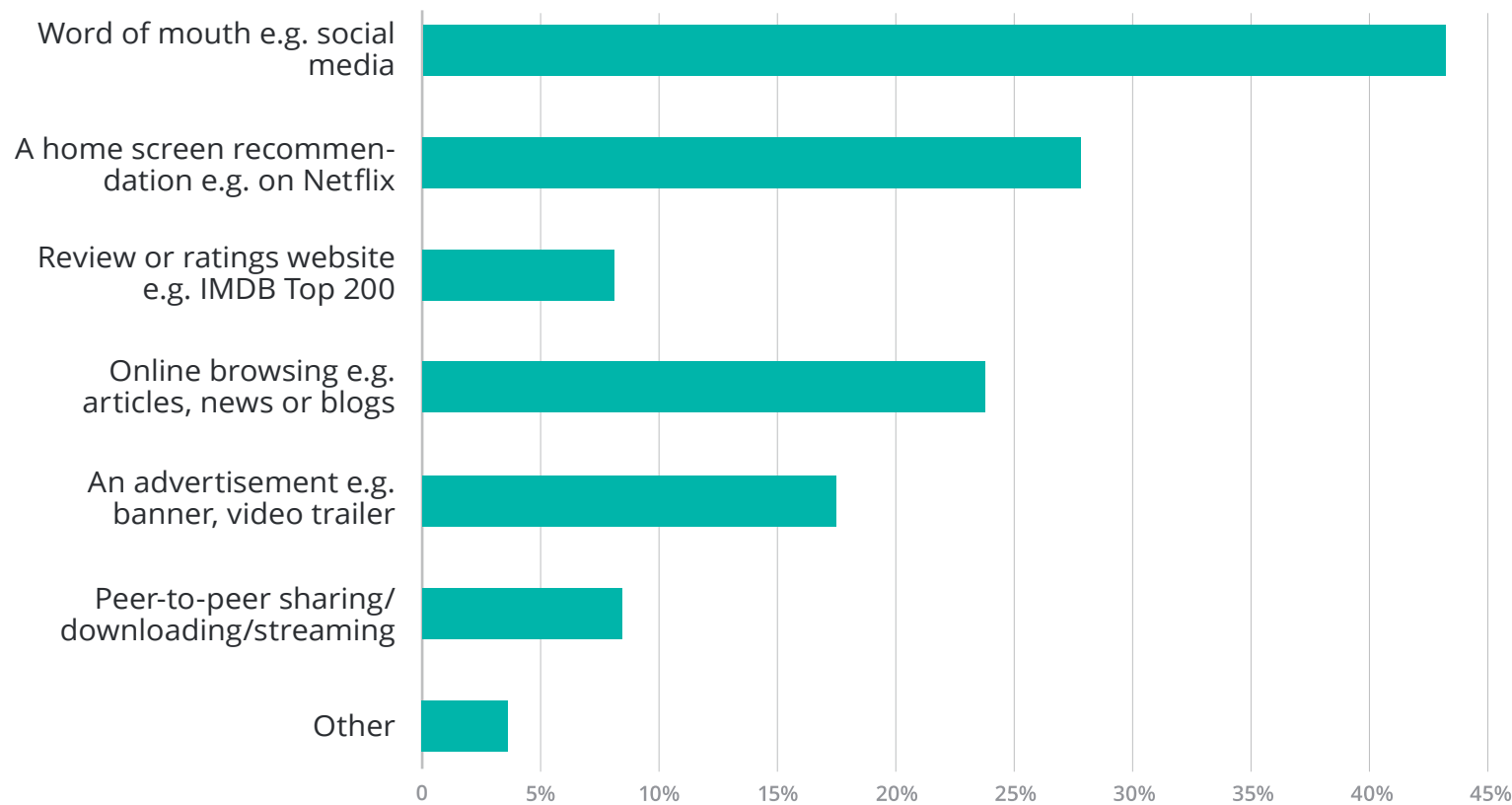
► Over half of people in Canada use word-of-mouth recommendations from friends and family to discover new content to watch.

► Cinema advertisements are most commonly used among young people aged 18 to 24 to find new shows.

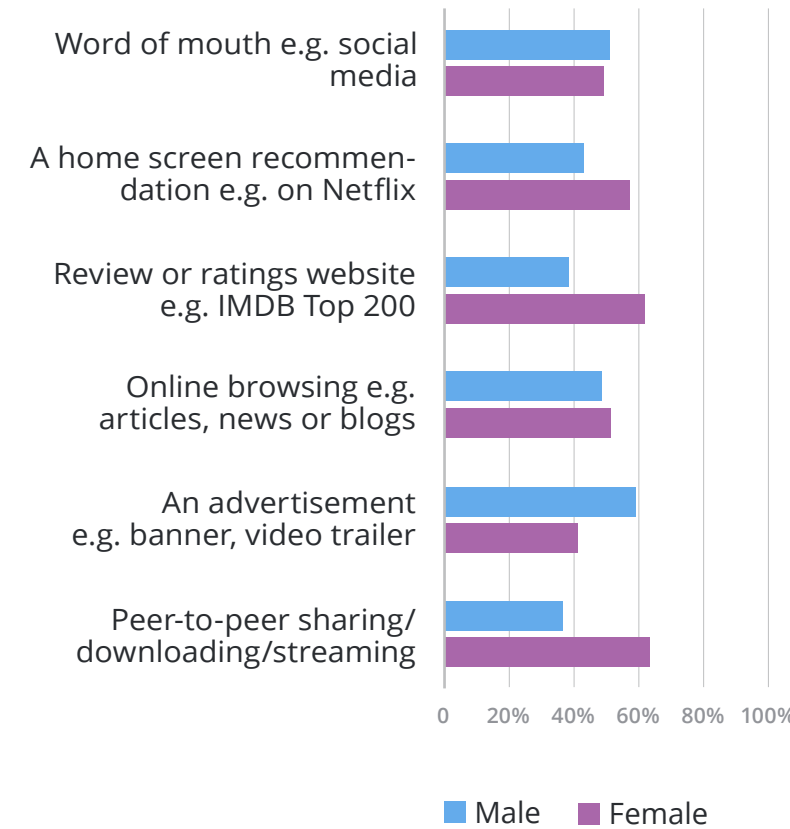
# How audiences discover content online in Canada

December, 2017

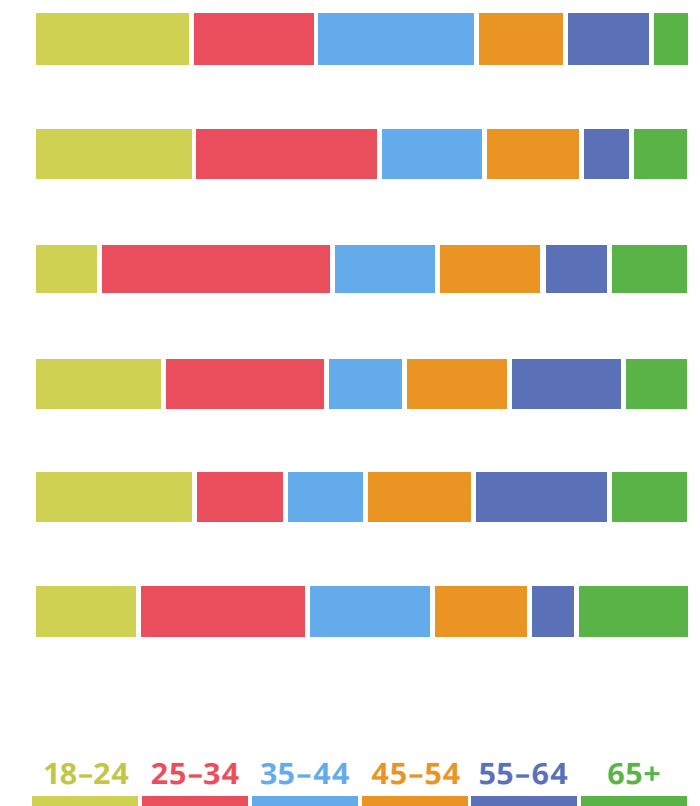
Methods of online television show discovery in 2017



Breakdown by gender



Breakdown by age



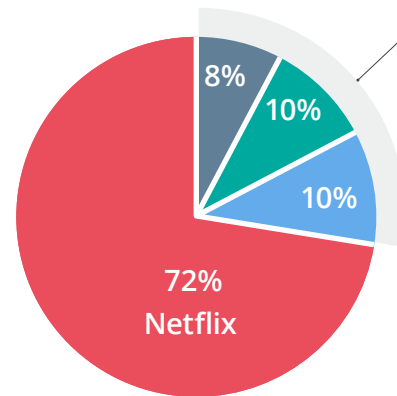
- ▶ Word of mouth, via social media, is also the most common method of discovering content online.
- ▶ Recommendations from online viewing platforms such as Netflix are the second-most common method, with 28% of people using it to find new shows to watch.

- ▶ Of people who use these methods, over 20% are aged 18 to 24.

# Demand trends in Canada

January–December, 2017 | Total Demand Expressions

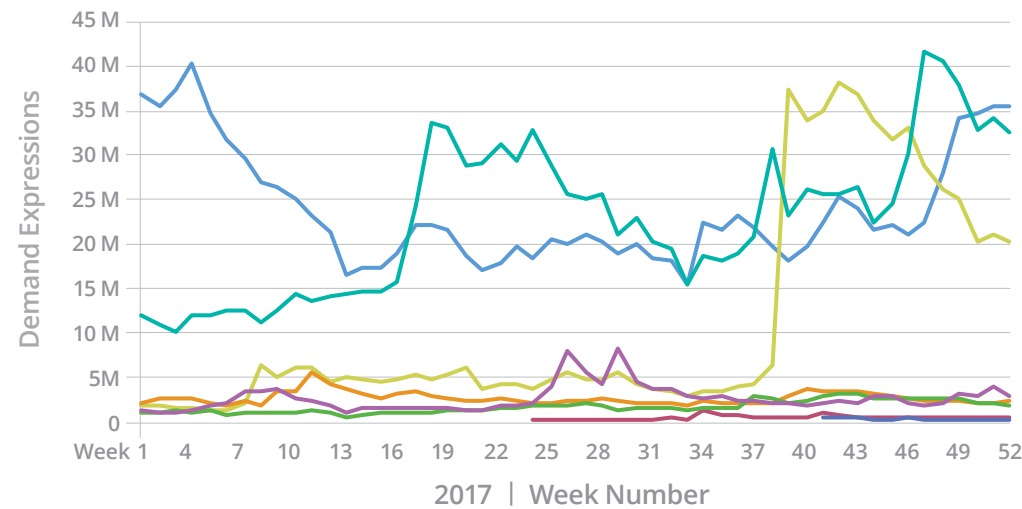
Total share of demand for platforms in 2017



Other Platforms

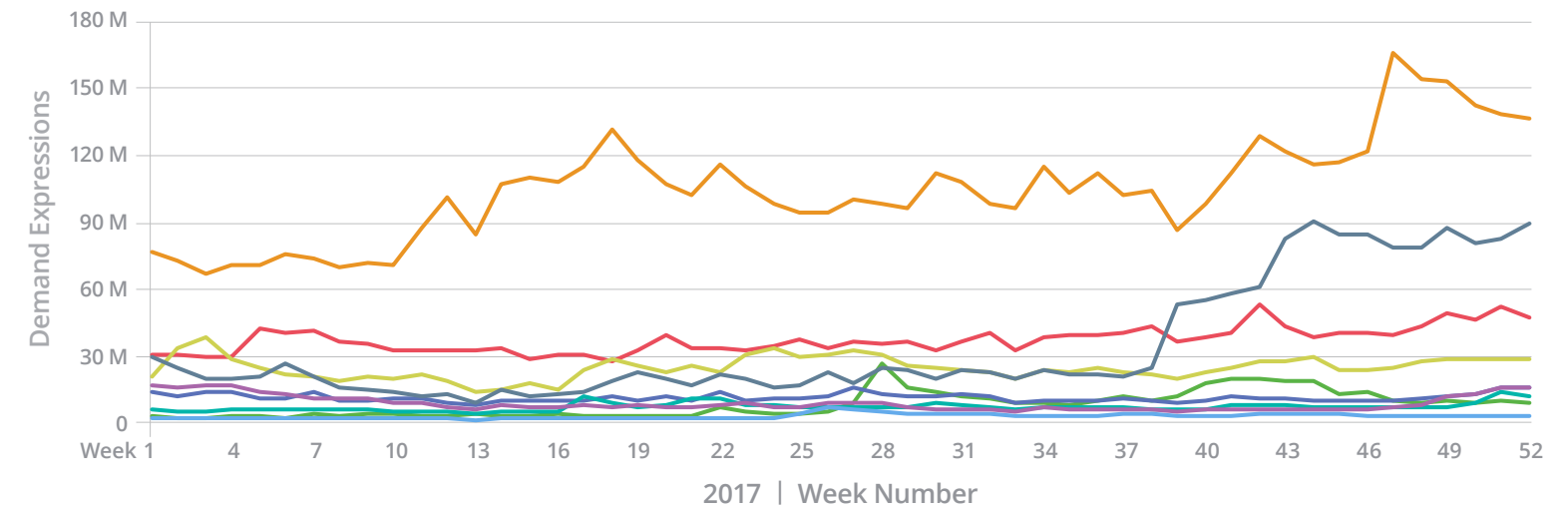
(CBS All Access, Crackle, Facebook, Apple Music, Seeso, Youtube Red)

Total platform demand in 2017 (ex. Netflix)



- Amazon Video
- CBS All Access
- Facebook
- Seeso
- Hulu
- Crackle
- Apple Music
- Youtube Red

Total genre demand for digital original series in 2017



- Animation
- Comedy
- Documentary
- Horror
- Reality
- Children
- Comedy-drama
- Drama
- Science Fiction

- ▶ While the most popular non-Netflix series in Canada was CBS All Access' *Star Trek: Discovery*, Hulu's breakout hit *The Handmaid's Tale* ranked highest in this market as the tenth-most popular digital original series, likely because the author Margaret Atwood is from Canada.
- ▶ Demand for Hulu grew over 2017 and had the highest peak demand of any of the non-Netflix SVOD platforms. This growth meant that it ended the year with about the same total demand as Amazon Video. CBS All Access became the most popular platform after the release of *Star Trek: Discovery* (Netflix excluded), but it was the fourth-most popular platform from the release of *The Good Fight* as well.

- ▶ The total demand for drama series grew over the course of 2017 while demand for comedy remained about the same. Science fiction overtook comedy as the second-most popular genre with the release of *Stranger Things* and *Star Trek: Discovery* in October.
- ▶ The most in-demand title on Crackle in Canada was *Snatch* which came out in March 2017, followed by *Startup*, which was released in 2016.



# Top digital original series in Canada

January–December, 2017 | Average Daily Demand Expressions

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

				Avg. Demand Expressions	
1	<i>Stranger Things</i>	Netflix	Science Fiction	6,008,332	
2	<i>13 Reasons Why</i>	Netflix	Drama	5,063,260	
3	<i>Star Trek: Discovery</i>	CBS All Access	Science Fiction	3,838,219	
4	<i>Marvel's The Punisher</i>	Netflix	Drama	3,590,392	
5	<i>Mindhunter</i>	Netflix	Drama	2,884,114	
6	<i>Orange Is The New Black</i>	Netflix	Comedy-drama	2,592,826	
7	<i>Ozark</i>	Netflix	Drama	2,490,176	
8	<i>Marvel's Iron Fist</i>	Netflix	Drama	2,482,044	
9	<i>The Crown</i>	Netflix	Drama	2,406,338	
10	<i>The Handmaid's Tale</i>	Hulu	Drama	2,367,275	
11	<i>Narcos</i>	Netflix	Drama	2,362,576	
12	<i>Black Mirror</i>	Netflix	Science Fiction	2,333,788	
13	<i>Marvel's Runaways</i>	Hulu	Drama	1,859,356	
14	<i>Castlevania</i>	Netflix	Animation	1,856,233	
15	<i>Dark</i>	Netflix	Science Fiction	1,775,688	
16	<i>A Series Of Unfortunate Events</i>	Netflix	Comedy-drama	1,772,101	
17	<i>Santa Clarita Diet</i>	Netflix	Comedy	1,631,591	
18	<i>House Of Cards</i>	Netflix	Drama	1,386,170	
19	<i>The Grand Tour</i>	Amazon Video	Reality	1,377,778	
20	<i>Godless</i>	Netflix	Drama	1,376,930	

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

44	<i>The Good Fight</i>	CBS All Access	Drama	542,364	
48	<i>Escape The Night</i>	YouTube Red	Horror	499,701	
75	<i>Snatch</i>	Crackle	Comedy-drama	278,036	
80	<i>Harmonquest</i>	Seeso	Comedy	236,912	
85	<i>StartUp</i>	Crackle	Drama	206,409	

# Audience discovery, platform, genre and title demand trends

January–December, 2017

## Australia

Learn how new TV shows are discovered and how this audience engagement and online activity drives demand for Digital Original series in Australia.

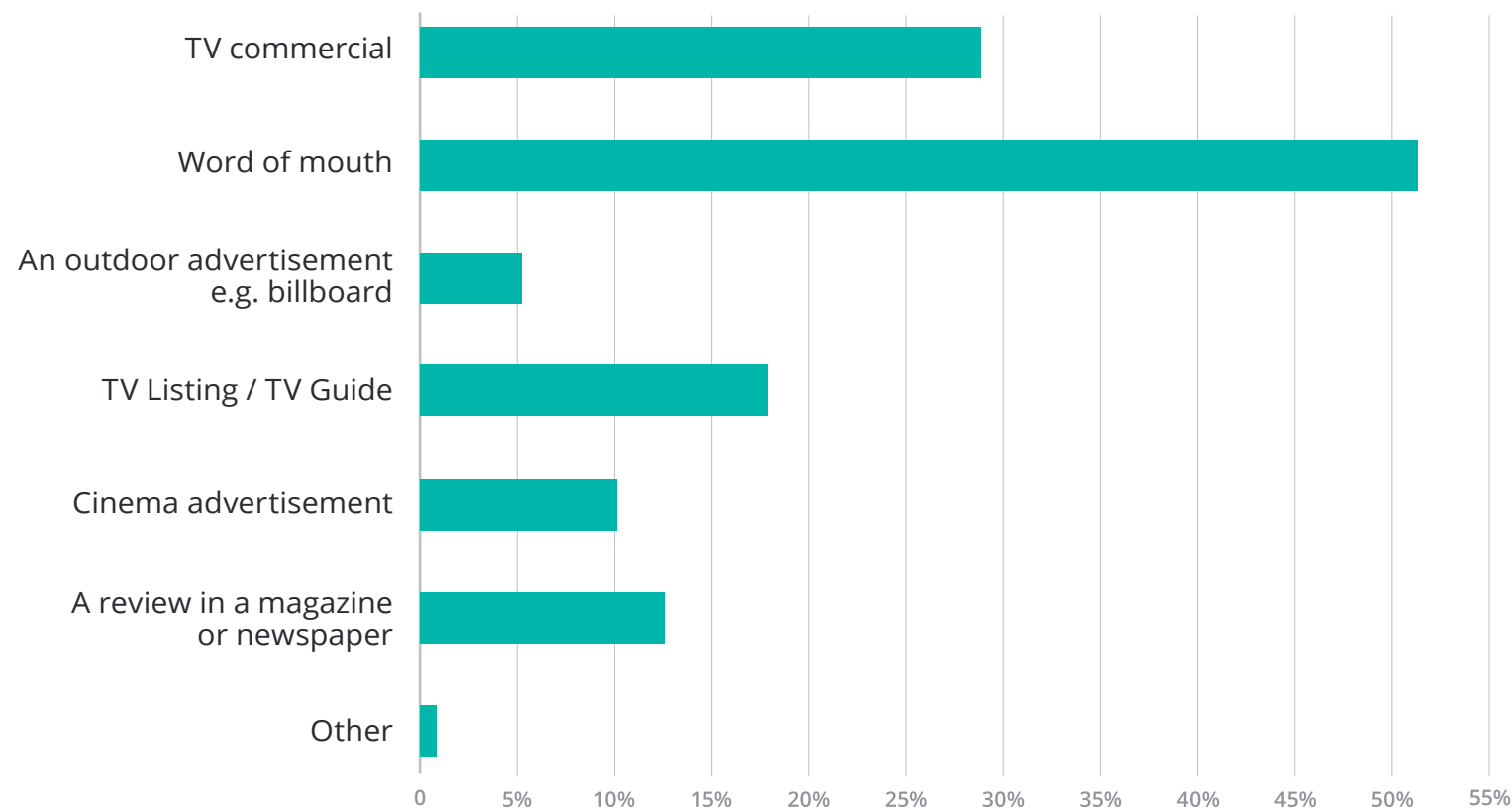
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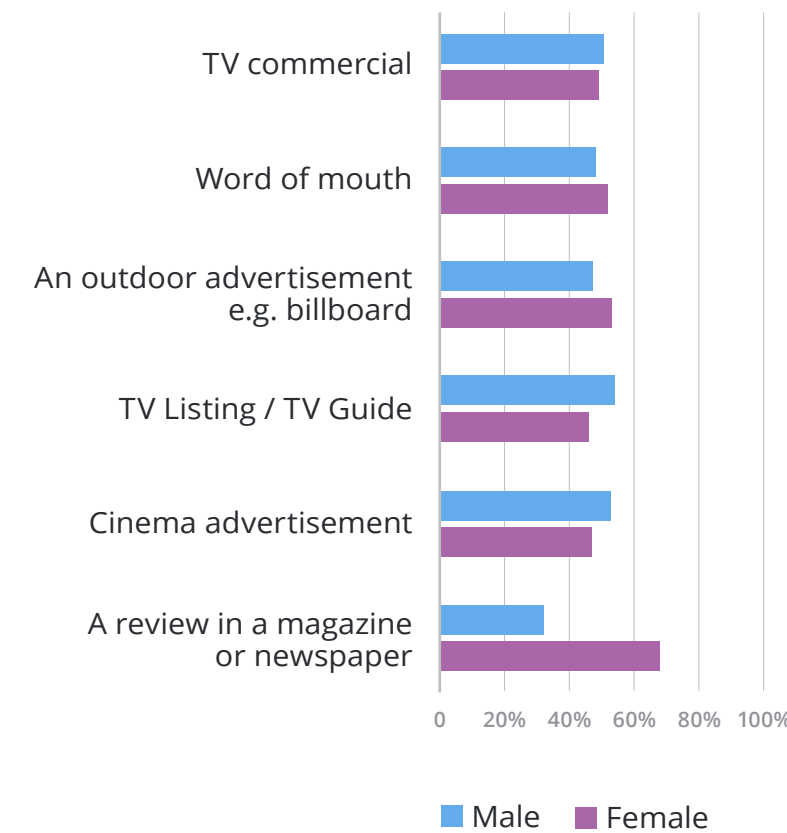
# How audiences discover content **offline** in Australia

December, 2017

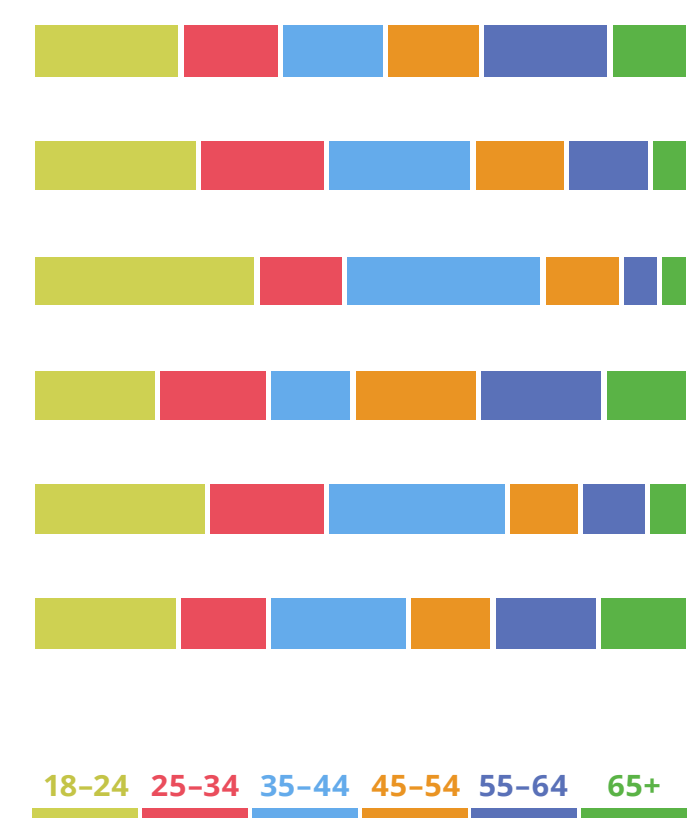
Methods of offline television show discovery in 2017



Breakdown by gender



Breakdown by age



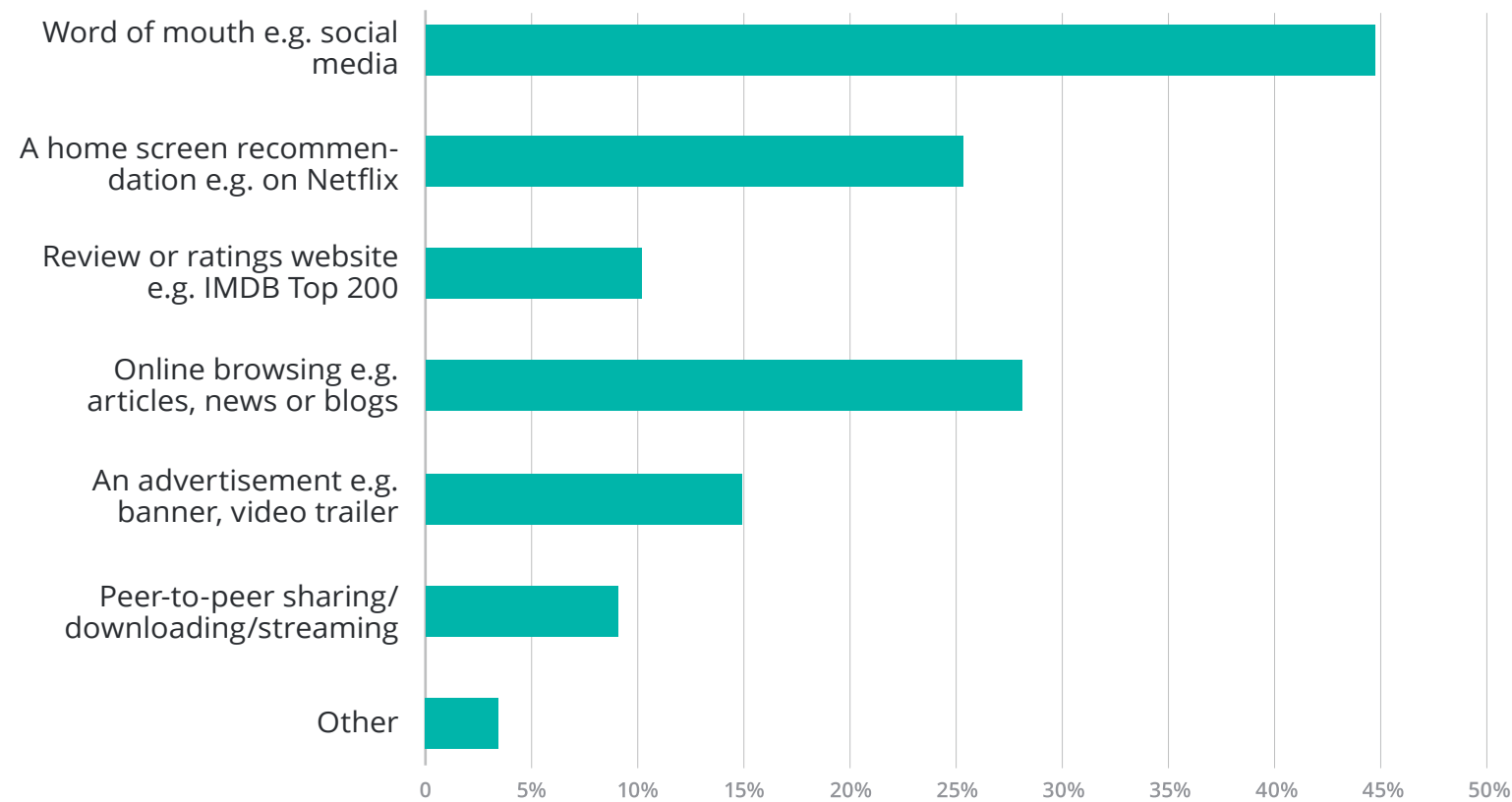
► Over half of people in Australia hear about new shows from word of mouth and television commercials were used by about 30% of people.

► About 80% of people who used outdoor advertising were aged 18 to 44, while TV listings and guides were most commonly used by people aged 45+.

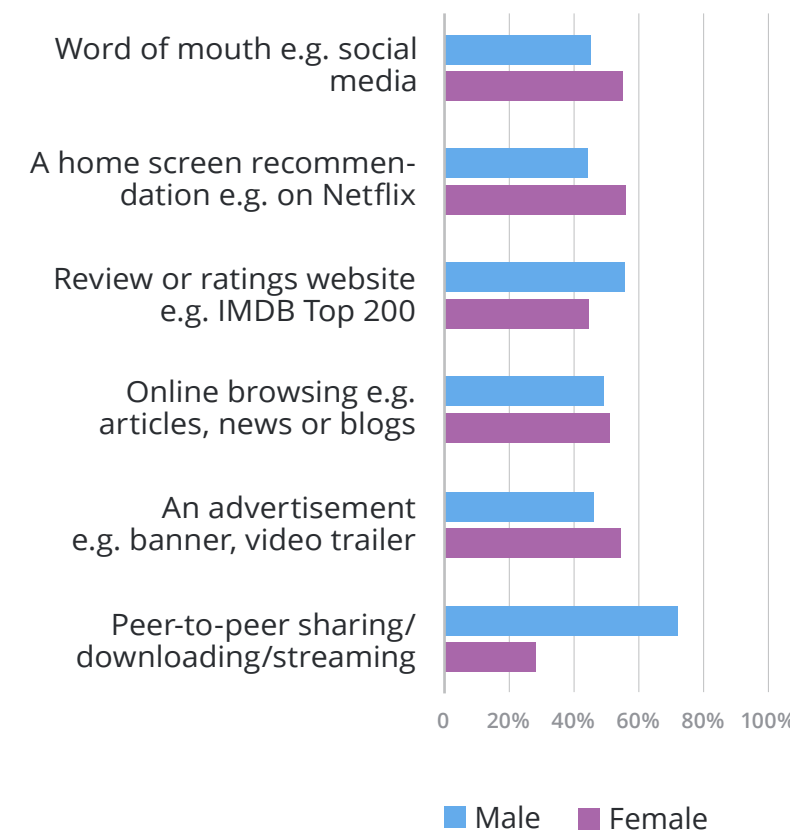
# How audiences discover content **online** in **Australia**

December, 2017

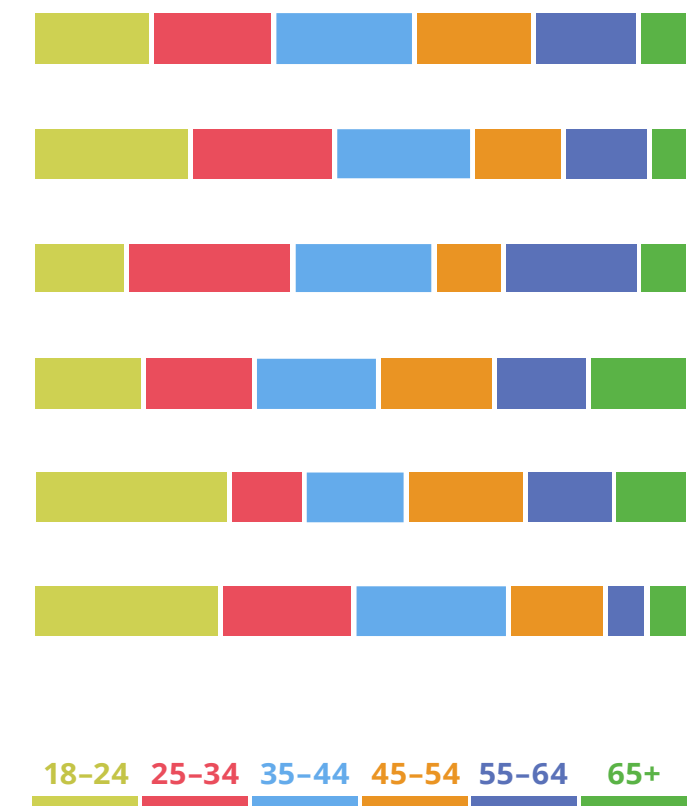
Methods of online television show discovery in 2017



Breakdown by gender



Breakdown by age



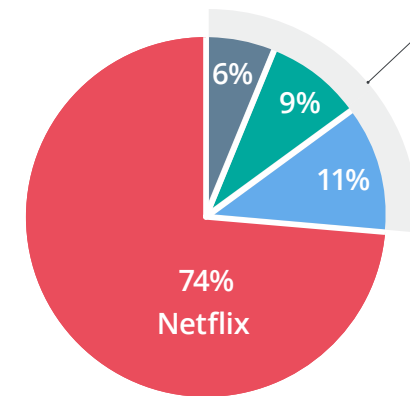
► Online, word of mouth via social media is also the most common method for discovering new content.

► Discovery of new TV shows on peer-to-peer networks is least common overall with only 9% of people using it; of these people, about 70% of them were male and half of them were aged 18 to 34.

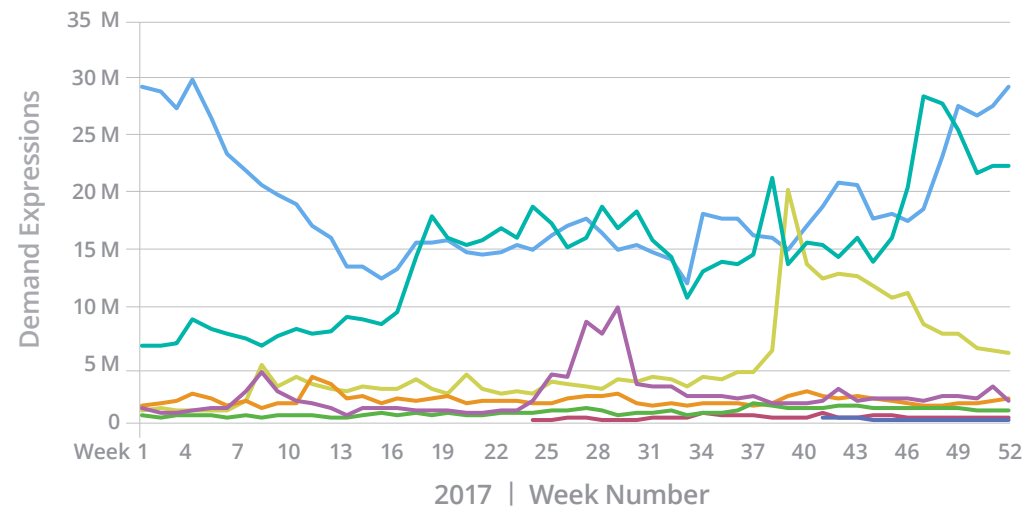
# Demand trends in Australia

January–December, 2017 | Total Demand Expressions

Total share of demand for platforms in 2017



Total platform demand in 2017 (ex. Netflix)

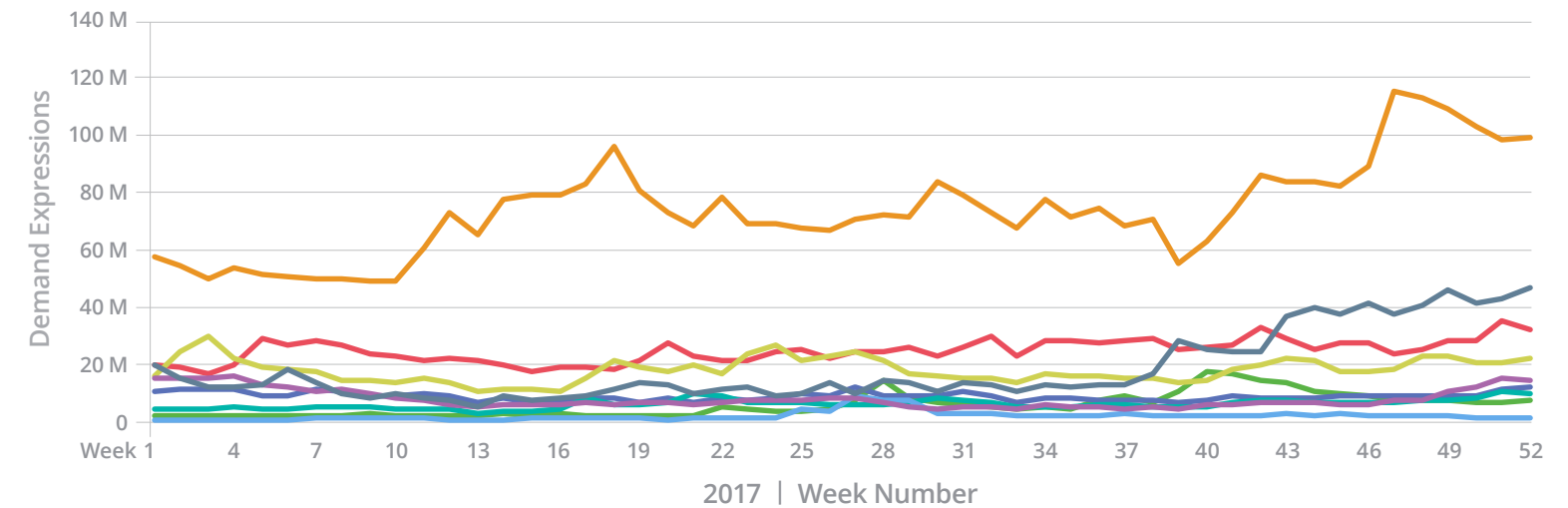


Other Platforms

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

- Amazon Video
- Hulu
- CBS All Access
- Crackle
- Facebook
- Apple Music
- Seeso
- Youtube Red

Total genre demand for digital original series in 2017



- Animation
- Children
- Comedy
- Comedy-drama
- Documentary
- Drama
- Horror
- Reality
- Science Fiction

- ▶ In contrast to many other markets, *13 Reasons Why* was the most popular digital original series of 2017 in Australia instead of *Stranger Things*. In addition, the most popular non-Netflix digital original series was Amazon's *The Grand Tour* instead of CBS All Access' *Star Trek: Discovery*. These rankings indicate that Australia has slightly different tastes than other English-language markets.
- ▶ Netflix had nearly 75% of the demand share in Australia, followed by Amazon Video which became available in the market in late 2016. Despite Hulu's growth in demand over the year, Amazon remained the second-most in-demand SVOD platform.

- ▶ Demand for most individual genres remained fairly steady, but drama increased over 2017. Science fiction also increased at the end of the year due to the release of *Stranger Things* and *Star Trek: Discovery*.
- ▶ *Wolf Creek*, on Australia's Stan, was more popular than CBS All Access' other major title, *The Good Fight*, and all titles on Crackle and YouTube Red except for *Escape the Night*.

# Top digital original series in Australia

January–December, 2017 | Average Daily Demand Expressions

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

				Avg. Demand Expressions	
1	<i>13 Reasons Why</i>	Netflix	Drama	3,949,396	
2	<i>Stranger Things</i>	Netflix	Science Fiction	3,272,459	
3	<i>Mindhunter</i>	Netflix	Drama	2,736,200	
4	<i>Marvel's The Punisher</i>	Netflix	Drama	2,325,631	
5	<i>The Crown</i>	Netflix	Drama	2,030,330	
6	<i>Orange Is The New Black</i>	Netflix	Comedy-drama	2,002,315	
7	<i>Ozark</i>	Netflix	Drama	1,919,608	
8	<i>Marvel's Iron Fist</i>	Netflix	Drama	1,898,664	
9	<i>A Series Of Unfortunate Events</i>	Netflix	Comedy-drama	1,505,768	
10	<i>The Grand Tour</i>	Amazon Video	Reality	1,375,089	
11	<i>Marvel's Runaways</i>	Hulu	Drama	1,325,972	
12	<i>Narcos</i>	Netflix	Drama	1,312,587	
13	<i>The Handmaid's Tale</i>	Hulu	Drama	1,263,121	
14	<i>House Of Cards</i>	Netflix	Drama	1,248,642	
15	<i>Santa Clarita Diet</i>	Netflix	Comedy	1,235,616	
16	<i>Dark</i>	Netflix	Science Fiction	1,231,117	
17	<i>Star Trek: Discovery</i>	CBS All Access	Science Fiction	1,201,991	
18	<i>Marvel's The Defenders</i>	Netflix	Drama	1,080,608	
19	<i>Godless</i>	Netflix	Drama	962,456	
20	<i>Castlevania</i>	Netflix	Animation	839,302	

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

42	<i>Wolf Creek</i>	Stan	Horror	424,815	
52	<i>The Good Fight</i>	CBS All Access	Drama	323,943	
72	<i>Snatch</i>	Crackle	Comedy-drama	236,537	
84	<i>Comedians In Cars Getting Coffee</i>	Crackle	Reality	142,953	
88	<i>StartUp</i>	Crackle	Drama	127,558	

# Audience discovery, platform, genre and title demand trends

January–December, 2017

## France

Learn how new TV shows are discovered and how this audience engagement and online activity drives demand for Digital Original series in France.

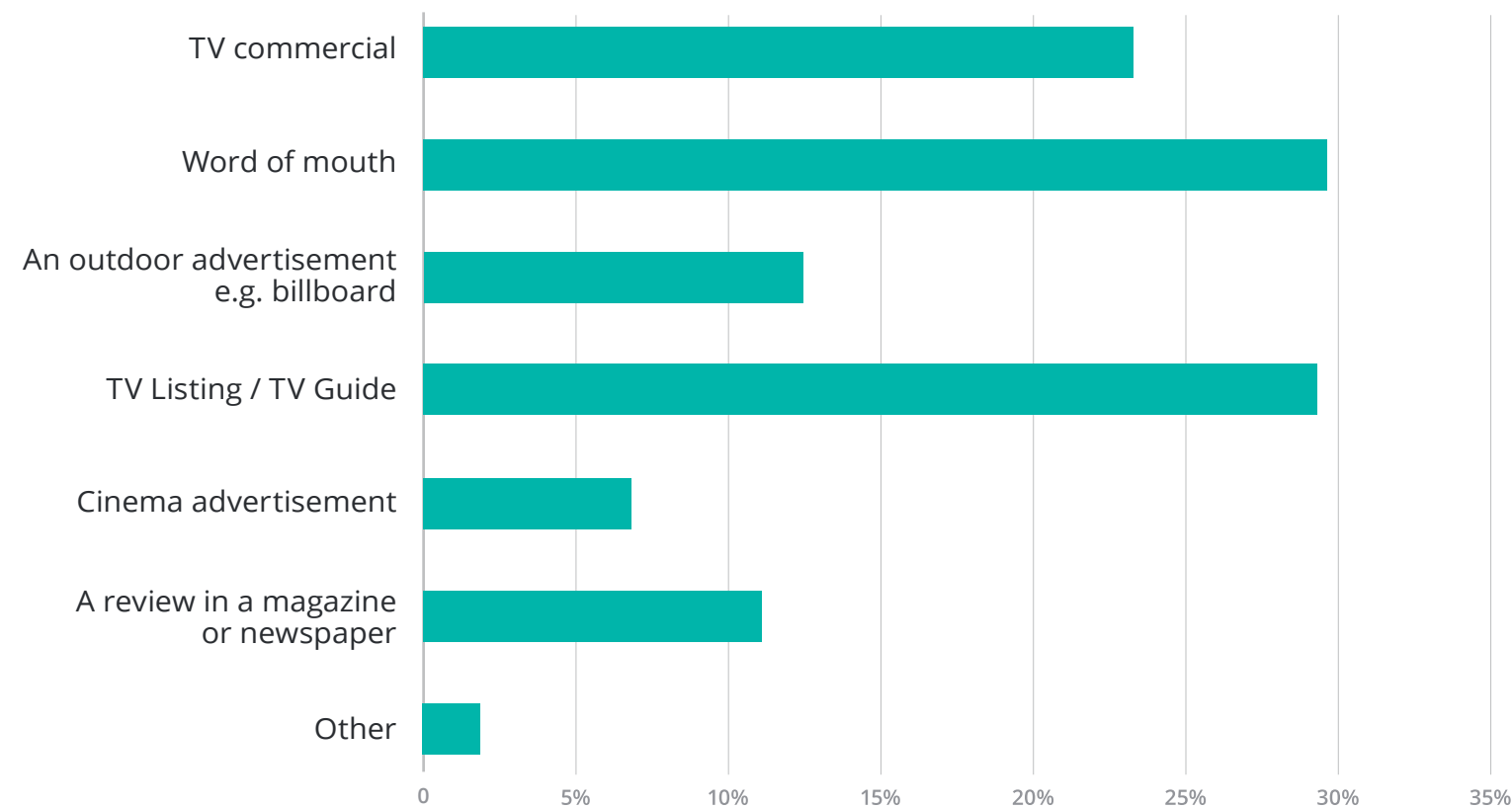
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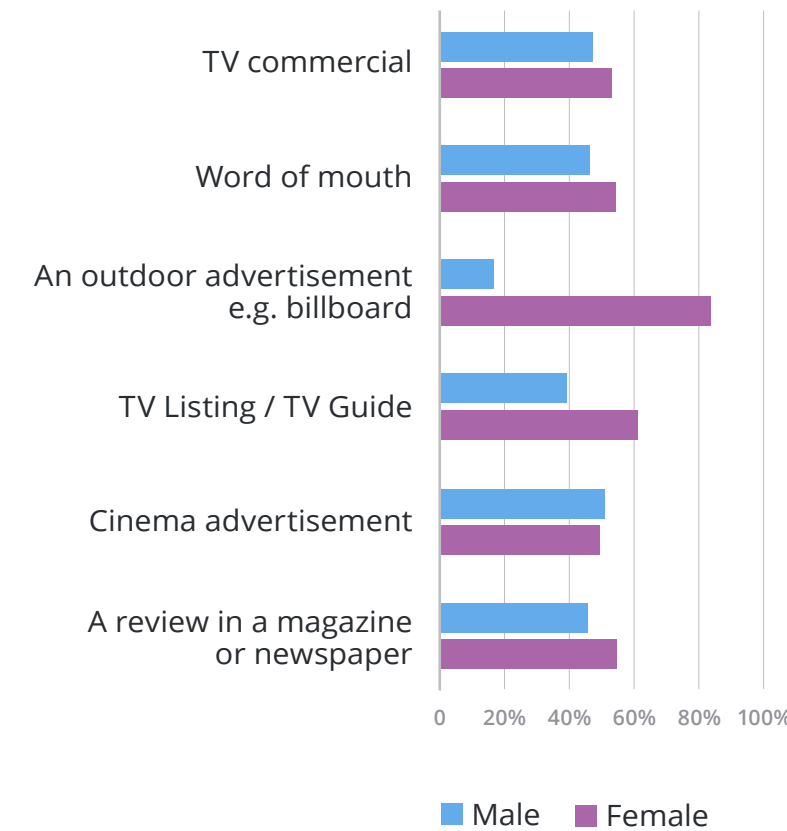
# How audiences discover content **offline** in France

December, 2017

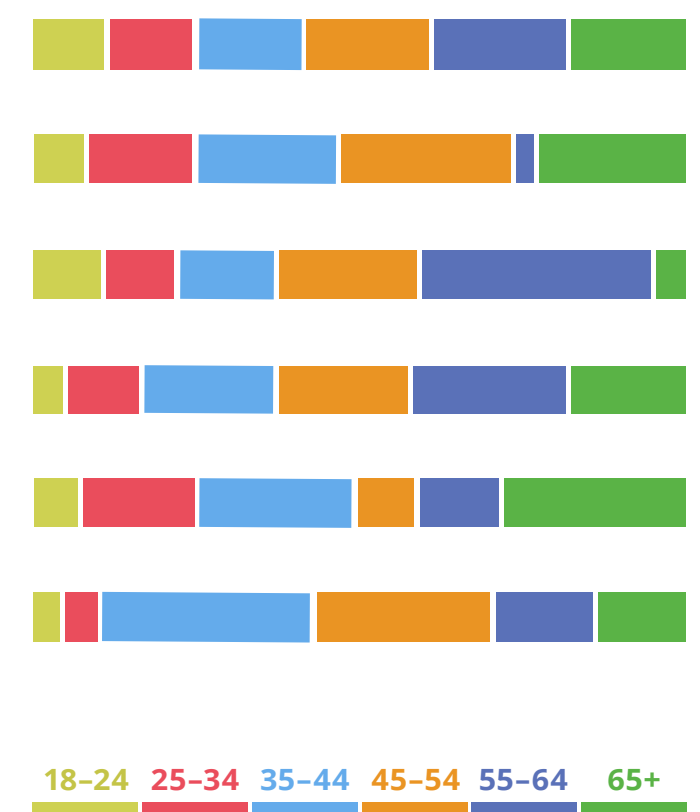
Methods of offline television show discovery in 2017



Breakdown by gender



Breakdown by age



► In France, about 30% of people use word of mouth or television listings/guides to discover new content, followed by television commercials at 23%.

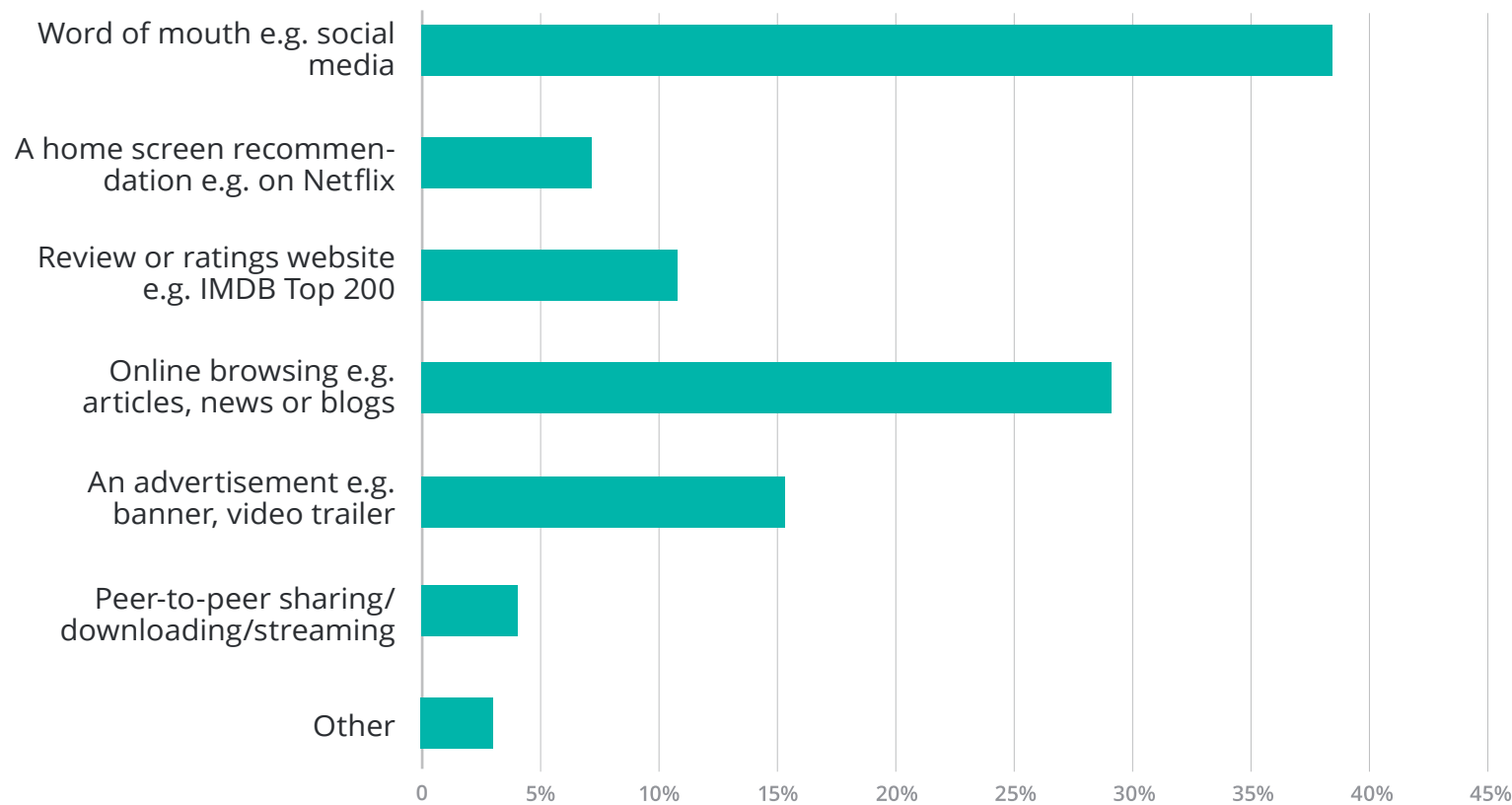
► Of the people who used outdoor advertisements to find new shows, over 80% of them are women and 40% are aged 55+.



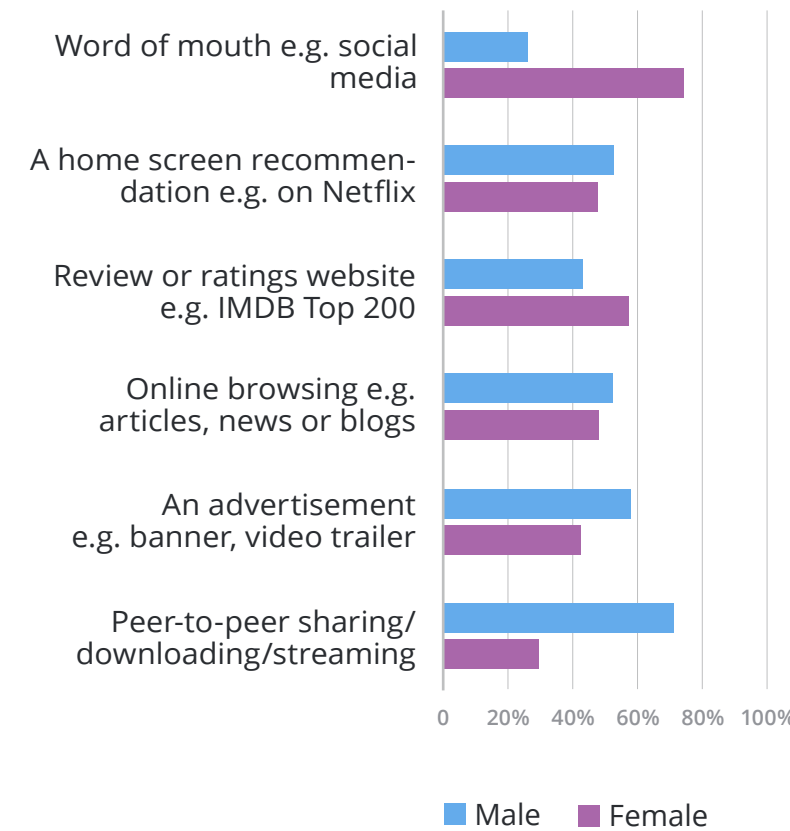
# How audiences discover content online in France

December, 2017

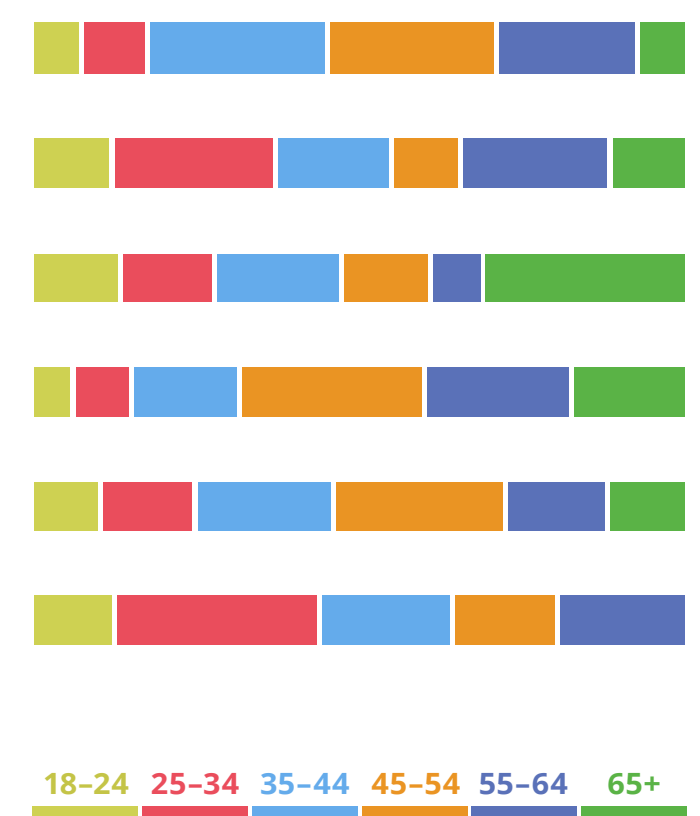
Methods of online television show discovery in 2017



Breakdown by gender



Breakdown by age



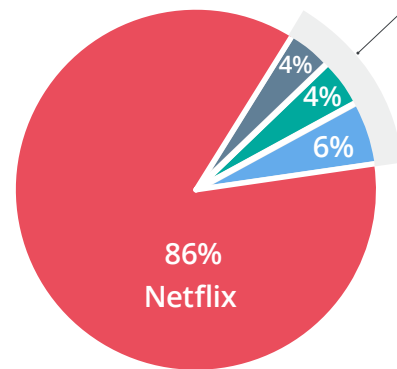
► Word of mouth is the most common method of discovery online, with 38% of people using recommendations from social media.

► Peer-to-peer networks are only used by about 4% to find content; of them, about 70% are male and over 40% are aged 18 to 34.

# Demand trends in France

January–December, 2017 | Total Demand Expressions

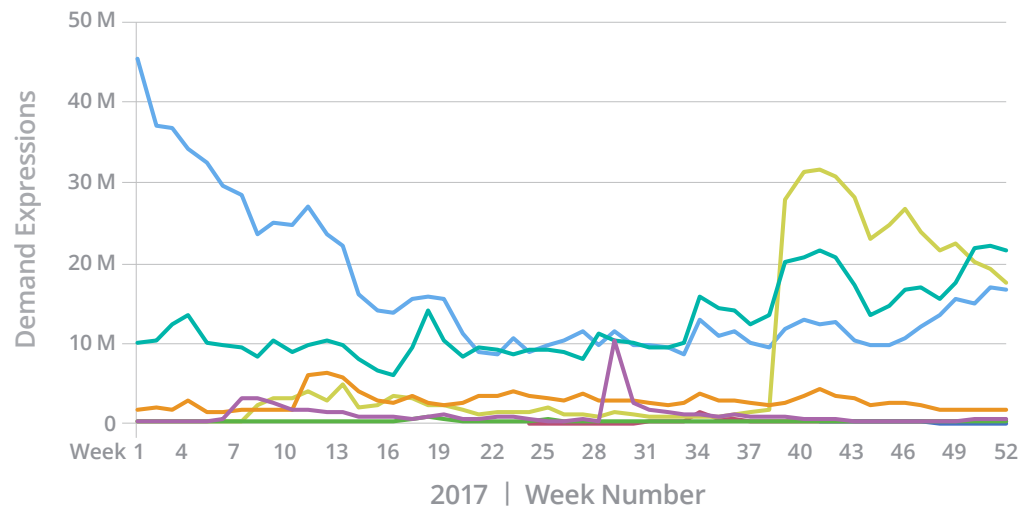
Total share of demand for platforms in 2017



Other Platforms

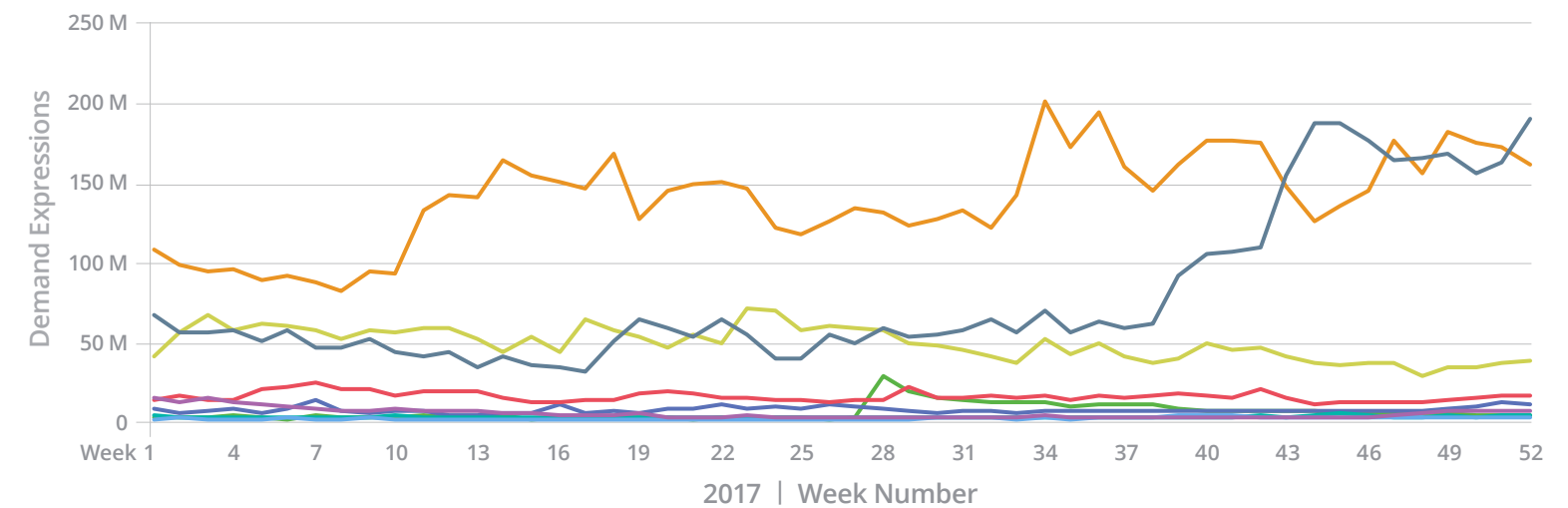
(CBS All Access, Crackle, Facebook, Apple Music, Seeso, Youtube Red)

Total platform demand in 2017 (ex. Netflix)



- Amazon Video
- CBS All Access
- Facebook
- Seeso
- Hulu
- Crackle
- Apple Music
- Youtube Red

Total genre demand for digital original series in 2017



- Animation
- Comedy
- Documentary
- Horror
- Reality
- Children
- Comedy-drama
- Drama
- Science Fiction

- ▶ Two science fiction titles — *Stranger Things* and *Black Mirror* — were the most popular digital original series in France with 50% more demand than the next-most popular title, *13 Reasons Why*. Older favorite *Orange is the New Black* ranked fifth while the most popular non-Netflix title, CBS All Access' *Star Trek: Discovery*, ranked ninth.
- ▶ Netflix accounted for 86% of total demand from digital original series, followed by Amazon at 6%. Demand for Amazon titles decreased over the course of 2017 while demand for Hulu increased. CBS All Access was the second-most in-demand platform behind Netflix in September and October due to the release of *Star Trek: Discovery*.

- ▶ Drama was the most popular genre for digital original series for most of 2017. Comedy-dramas and science fiction had similar demand for the first half of the year, but science fiction increased to be about as popular as dramas after *Stranger Things* and *Black Mirror* was released.
- ▶ Crackle's *Snatch* was among the top 30 digital original series in France despite the platform not being available there.

# Top digital original series in France

January–December, 2017 | Average Daily Demand Expressions

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

				Avg. Demand Expressions	
1	<i>Stranger Things</i>	Netflix	Science Fiction	17,336,709	
2	<i>Black Mirror</i>	Netflix	Science Fiction	12,836,506	
3	<i>13 Reasons Why</i>	Netflix	Drama	8,576,297	
4	<i>Narcos</i>	Netflix	Drama	7,841,423	
5	<i>Orange Is The New Black</i>	Netflix	Comedy-drama	7,095,794	
6	<i>Sense8</i>	Netflix	Science Fiction	4,842,522	
7	<i>Marvel's The Punisher</i>	Netflix	Drama	4,068,899	
8	<i>Marvel's Iron Fist</i>	Netflix	Drama	3,745,024	
9	<i>Star Trek: Discovery</i>	CBS All Access	Science Fiction	3,396,811	
10	<i>The Crown</i>	Netflix	Drama	2,545,043	
11	<i>House Of Cards</i>	Netflix	Drama	2,185,291	
12	<i>A Series Of Unfortunate Events</i>	Netflix	Comedy-drama	2,165,823	
13	<i>Castlevania</i>	Netflix	Animation	2,112,897	
14	<i>Marvel's The Defenders</i>	Netflix	Drama	1,984,787	
15	<i>Santa Clarita Diet</i>	Netflix	Comedy	1,160,311	
16	<i>Godless</i>	Netflix	Drama	1,073,283	
17	<i>Marvel's Daredevil</i>	Netflix	Drama	1,000,804	
18	<i>The Get Down</i>	Netflix	Drama	928,694	
19	<i>The Last Kingdom</i>	Netflix	Drama	896,999	
20	<i>The Grand Tour</i>	Amazon Video	Reality	889,050	

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

28	<i>Snatch</i>	Crackle	Comedy-drama	604,211	
39	<i>The Good Fight</i>	CBS All Access	Drama	399,685	
67	<i>StartUp</i>	Crackle	Drama	135,784	
96	<i>Bad Internet</i>	YouTube Red	Comedy	49,752	
101	<i>Carpool Karaoke</i>	Apple Music	Reality	46,693	

# Audience discovery, platform, genre and title demand trends

January–December, 2017

## Germany

Learn how new TV shows are discovered and how this audience engagement and online activity drives demand for Digital Original series in Germany.

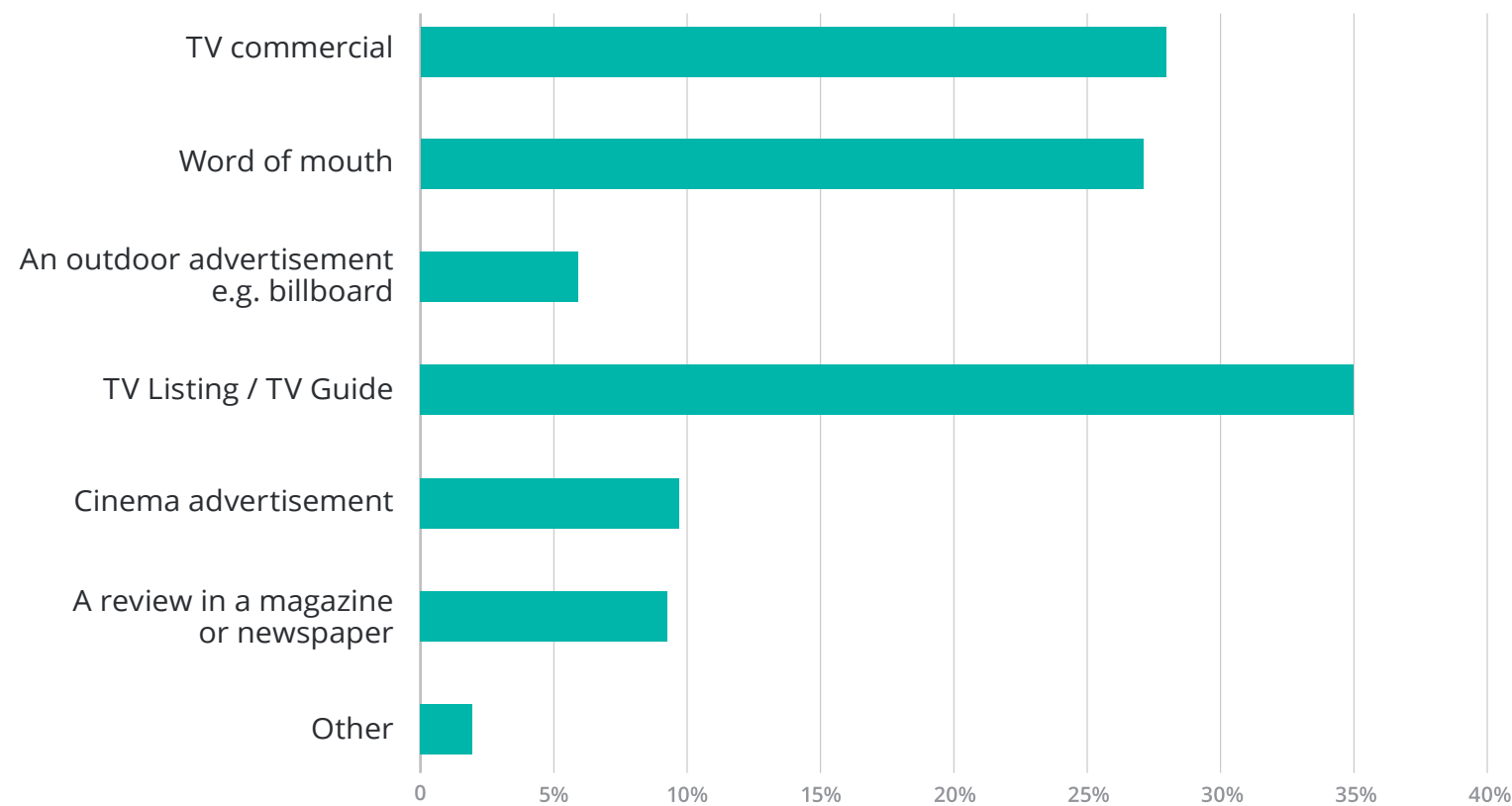
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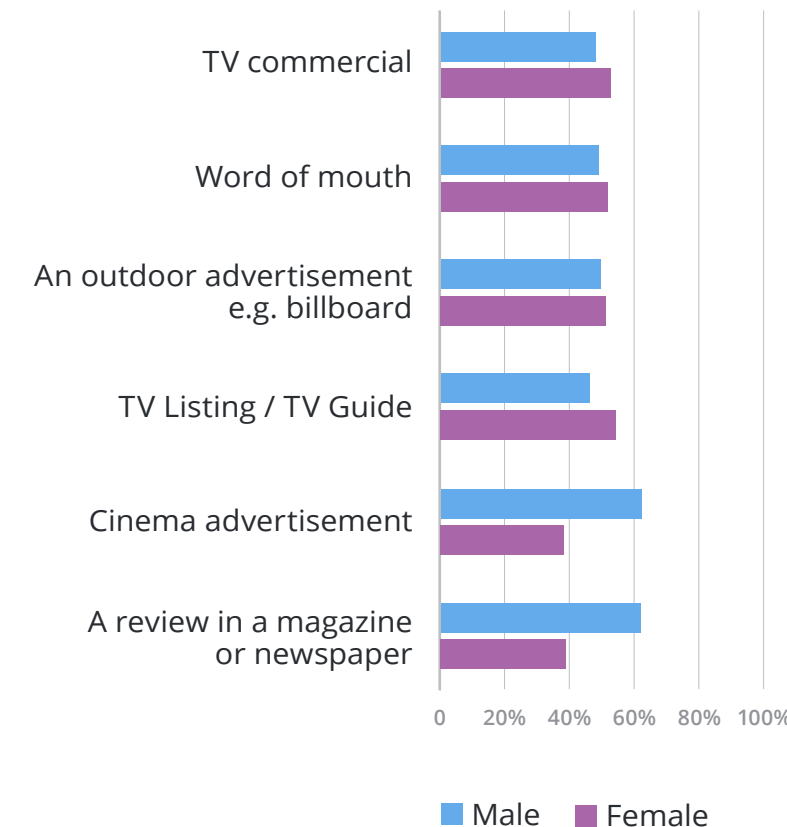
# How audiences discover content **offline** in Germany

December, 2017

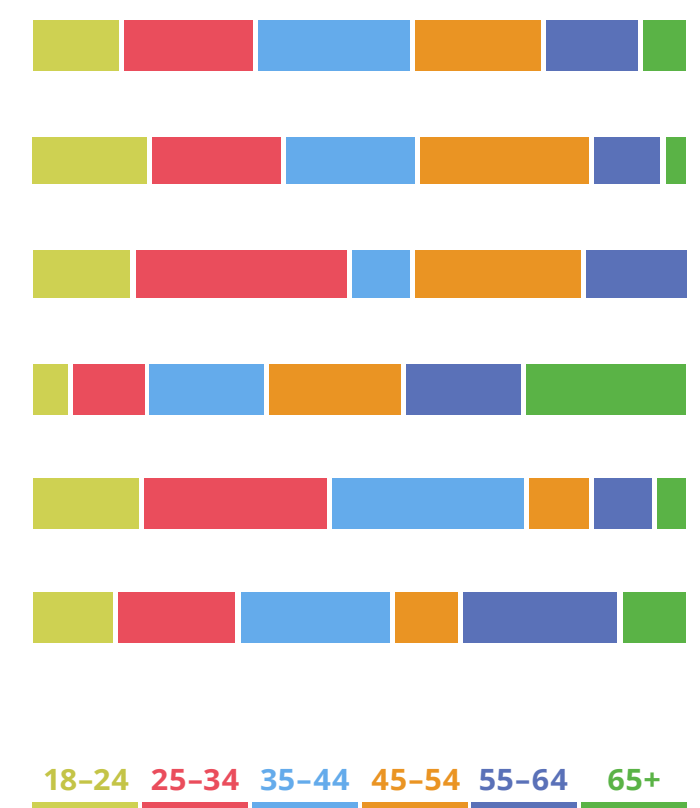
Methods of offline television show discovery in 2017



Breakdown by gender



Breakdown by age



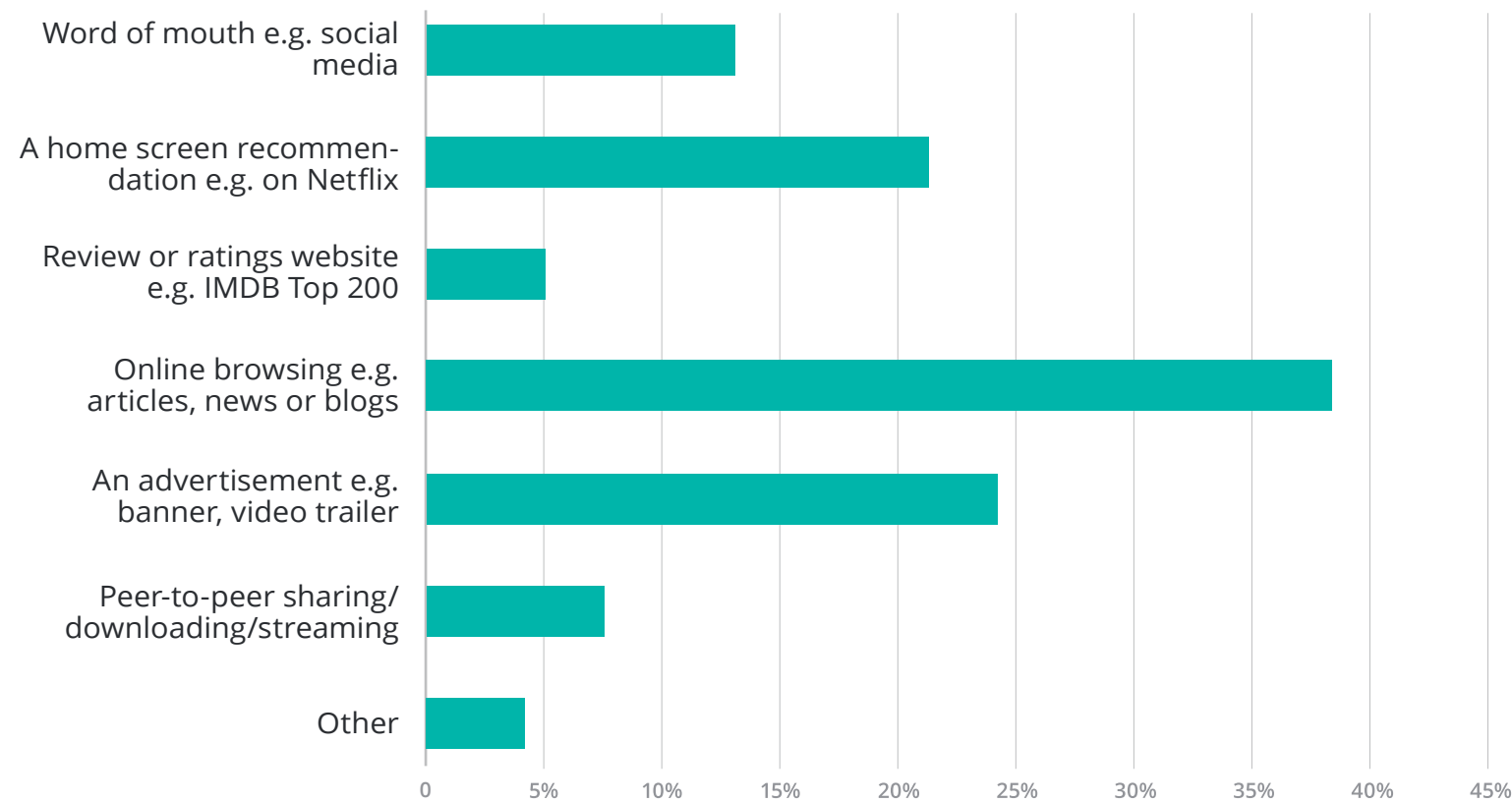
▶ Offline, people in Germany use television listings and guides most commonly to discover new content, with 35% of people using them.

▶ About 27% of people find new shows via television commercials and word of mouth; of these people, nearly 60% are aged 18 to 44.

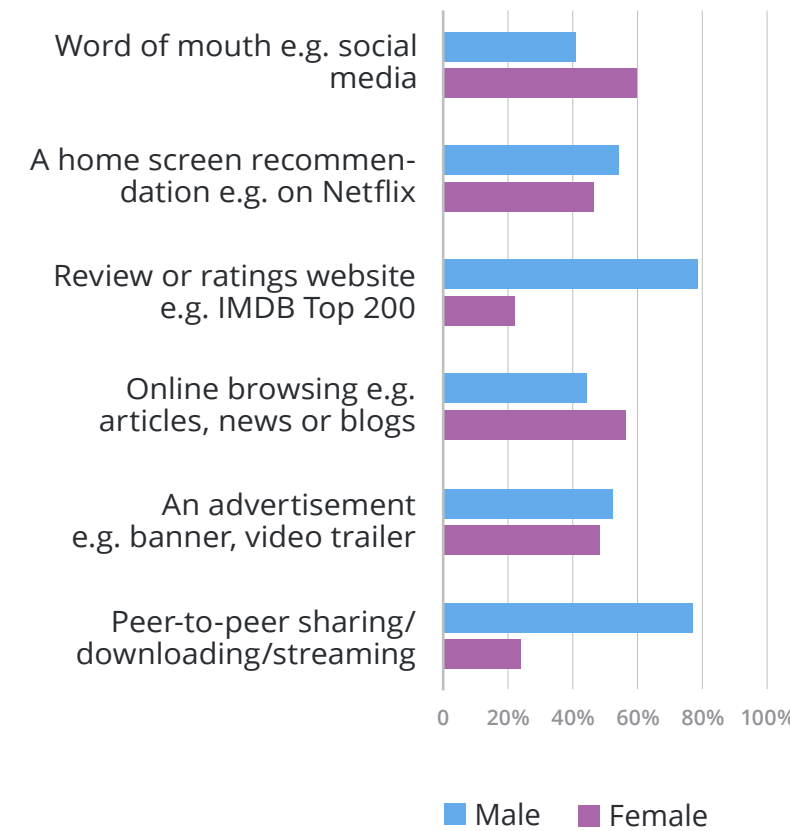
# How audiences discover content online in Germany

December, 2017

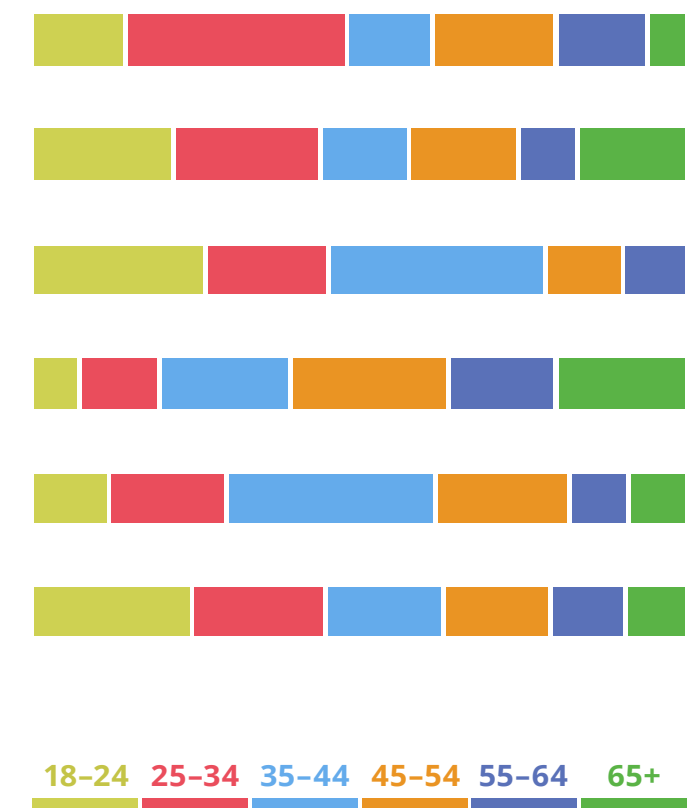
Methods of online television show discovery in 2017



Breakdown by gender



Breakdown by age



▶ Online, 38% of people in Germany find content via browsing articles, news, etc.; of these people, 60% of them are aged 45+.

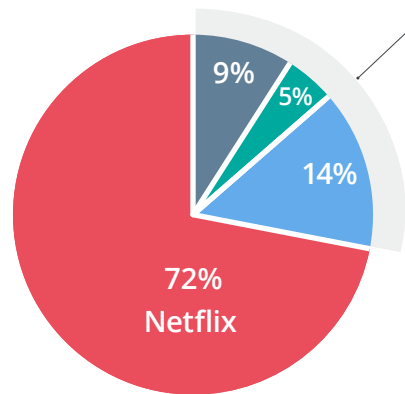
▶ Social media is most popular with young people aged 18 to 44, but only 13% of Germans overall use it to discover new shows.

▶ Both peer-to-peer networks and review sites are most commonly used by men.

# Demand trends in Germany

January–December, 2017 | Total Demand Expressions

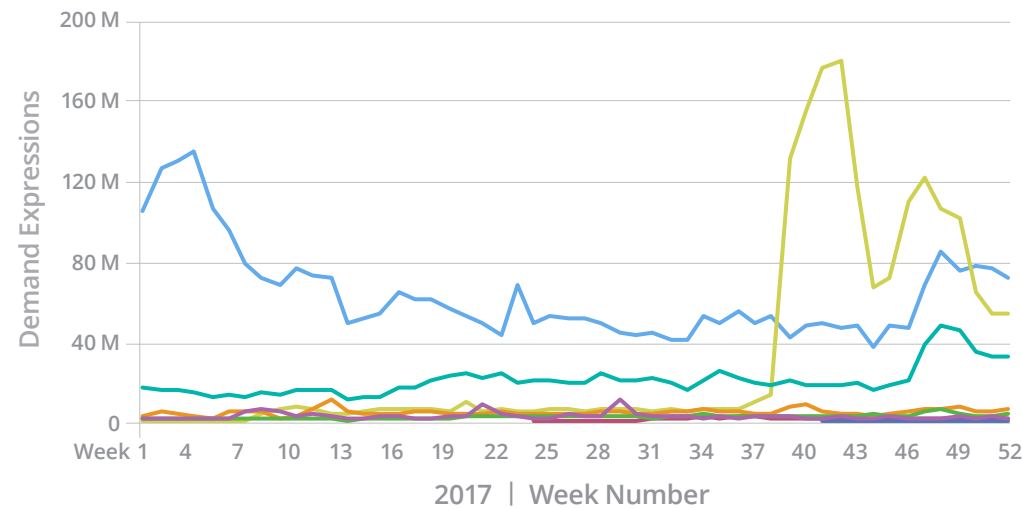
Total share of demand for platforms in 2017



Other Platforms

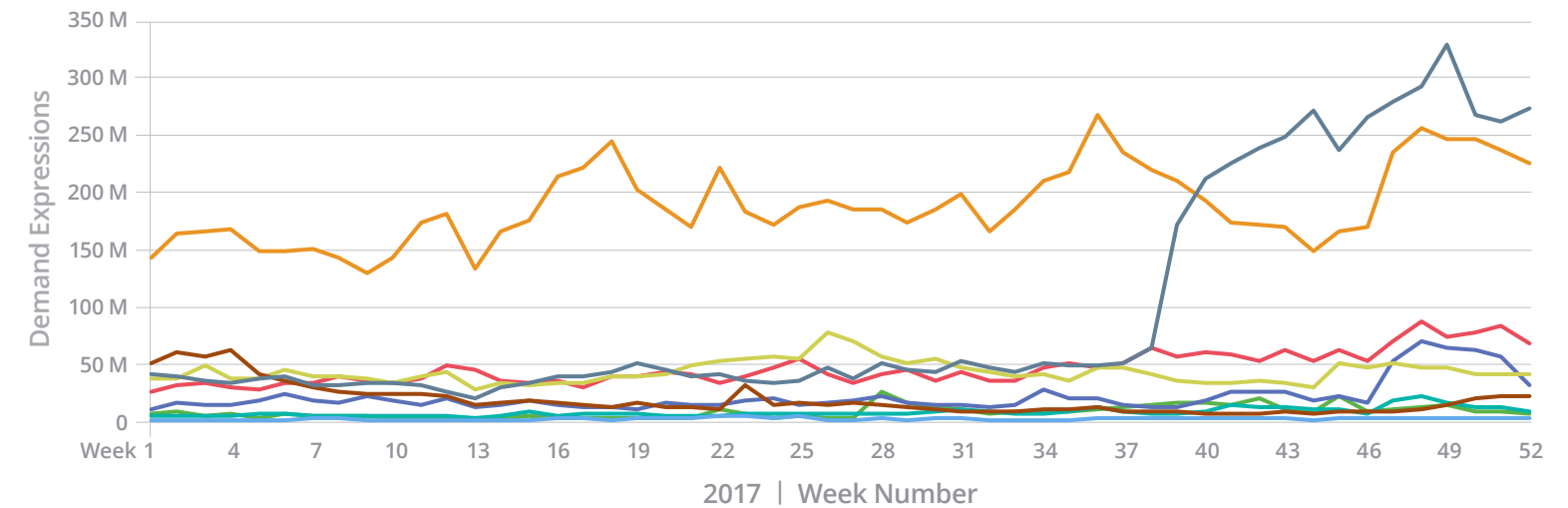
(CBS All Access, Crackle, Facebook, Apple Music, Seeso, Youtube Red)

Total platform demand in 2017 (ex. Netflix)



- Amazon Video
- CBS All Access
- Facebook
- Seeso
- Hulu
- Crackle
- Apple Music
- Youtube Red

Total genre demand for digital original series in 2017



- Animation
- Comedy
- Documentary
- Horror
- Reality
- Children
- Comedy-drama
- Drama
- Science Fiction

- ▶ Four out of the five most popular digital original titles in Germany were science fiction: Netflix's *Stranger Things* was the most popular, CBS All Access' *Star Trek: Discovery* ranked second, Netflix's German-language drama *Dark* ranked third, and *Black Mirror* ranked fifth.
- ▶ The high demand for *Star Trek: Discovery* in Germany caused the demand from CBS All Access to be more than twice the demand for Amazon and Hulu. However, Amazon still had 14% demand share over the year, likely because this platform has been available in the market since 2014.

- ▶ The release of *Stranger Things*, *Star Trek: Discovery*, *Dark*, and *Black Mirror* in quarter 4 of 2017 led to science fiction overtaking drama to be the most in-demand genre in Germany.
- ▶ Crackle titles such as *Snatch* and *StartUp* were more popular in Germany than titles like CBS All Access' *The Good Fight* and Apple's *Carpool Karaoke*, though Crackle is not available in this market.

# Top digital original series in Germany

January–December, 2017 | Average Daily Demand Expressions

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

				Avg. Demand Expressions	
1	<i>Stranger Things</i>	Netflix	Science Fiction	21,269,400	
2	<i>Star Trek: Discovery</i>	CBS All Access	Science Fiction	14,362,206	
3	<i>Dark</i>	Netflix	Science Fiction	12,274,071	
4	<i>Narcos</i>	Netflix	Drama	11,129,883	
5	<i>Black Mirror</i>	Netflix	Science Fiction	8,174,824	
6	<i>13 Reasons Why</i>	Netflix	Drama	6,579,474	
7	<i>Orange Is The New Black</i>	Netflix	Comedy-drama	5,172,913	
8	<i>House Of Cards</i>	Netflix	Drama	4,880,214	
9	<i>Marvel's Iron Fist</i>	Netflix	Drama	4,524,281	
10	<i>The Crown</i>	Netflix	Drama	3,415,533	
11	<i>The Grand Tour</i>	Amazon Video	Reality	2,728,446	
12	<i>Sense8</i>	Netflix	Science Fiction	2,235,912	
13	<i>Ozark</i>	Netflix	Drama	2,184,738	
14	<i>Marvel's The Defenders</i>	Netflix	Drama	2,162,063	
15	<i>Marvel's The Punisher</i>	Netflix	Drama	2,154,469	
16	<i>Fuller House</i>	Netflix	Comedy	2,112,872	
17	<i>G.L.O.W.</i>	Netflix	Comedy-drama	1,973,167	
18	<i>The Man In The High Castle</i>	Amazon Video	Drama	1,823,461	
19	<i>Castlevania</i>	Netflix	Animation	1,637,723	
20	<i>Gilmore Girls</i>	Netflix	Comedy-drama	1,500,159	

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

49	<i>Snatch</i>	Crackle	Comedy-drama	586,859	
51	<i>StartUp</i>	Crackle	Drama	575,930	
67	<i>The Good Fight</i>	CBS All Access	Drama	398,846	
116	<i>Comedians In Cars Getting Coffee</i>	Crackle	Reality	122,238	
122	<i>Carpool Karaoke</i>	Apple Music	Reality	97,547	



# Audience discovery, platform, genre and title demand trends

January–December, 2017

## Spain

Learn how new TV shows are discovered and how this audience engagement and online activity drives demand for Digital Original series in Spain.

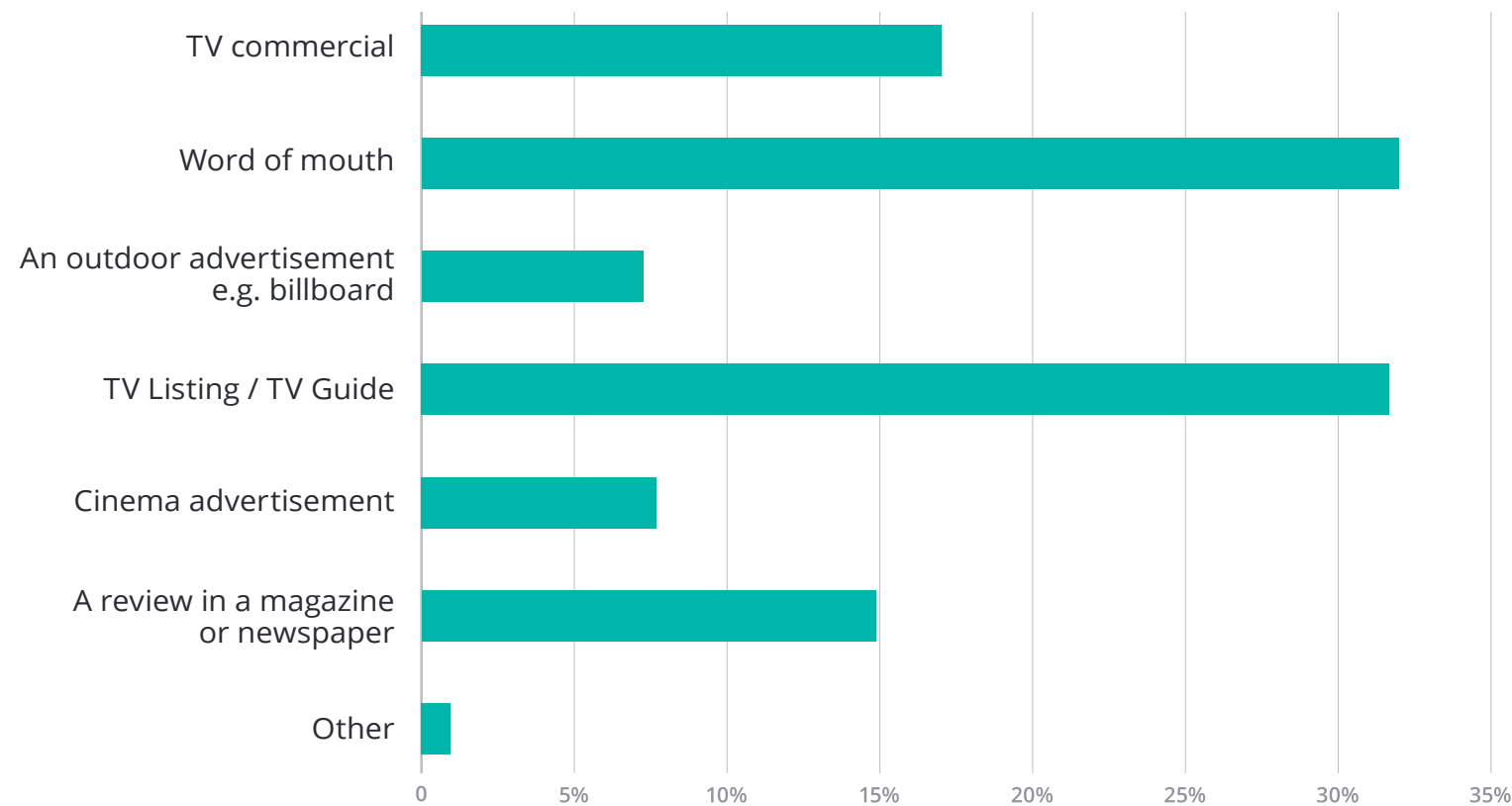
Based on our representative survey, the methods by which people discover new television series, both online and offline, are collated and broken down by gender and age.

The total demand by platform and by genre for SVOD digital original series are tracked over the year and, lastly, the top 20 digital original series are ranked by their average Demand Expressions in each of the ten markets. For titles that aired new episodes in 2017, their demand was averaged during their season (for episodic releases) or over the month after their release (for all-at-once releases). For titles that did not air during 2017, their demand over the entire year was averaged. Unlike the Audience Content Discovery Survey, Demand Expressions measure the entire population and are **not** based on panel data.

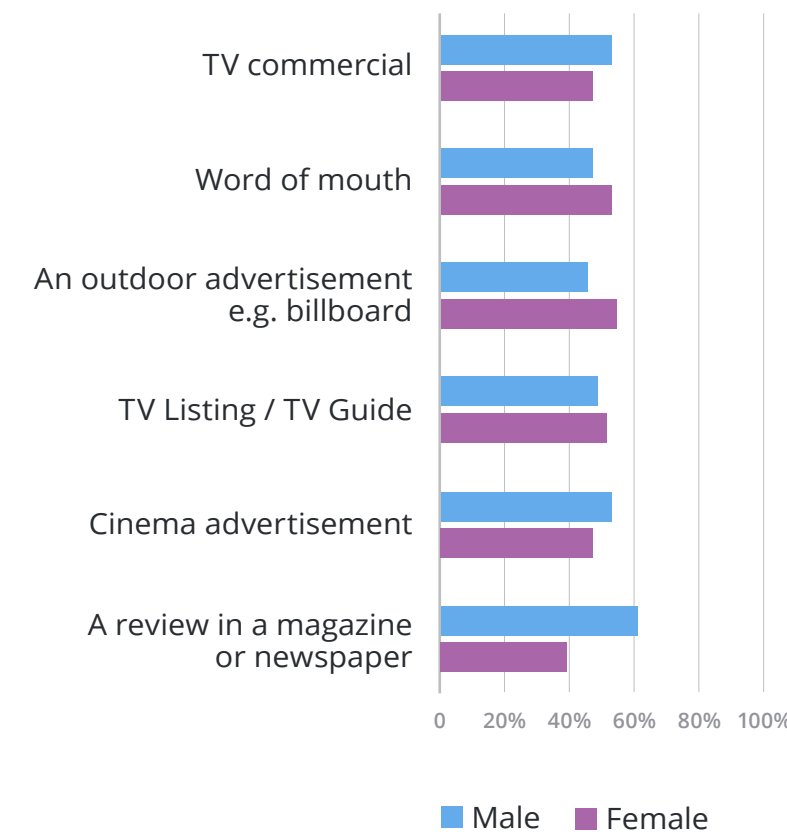
# How audiences discover content **offline** in Spain

December, 2017

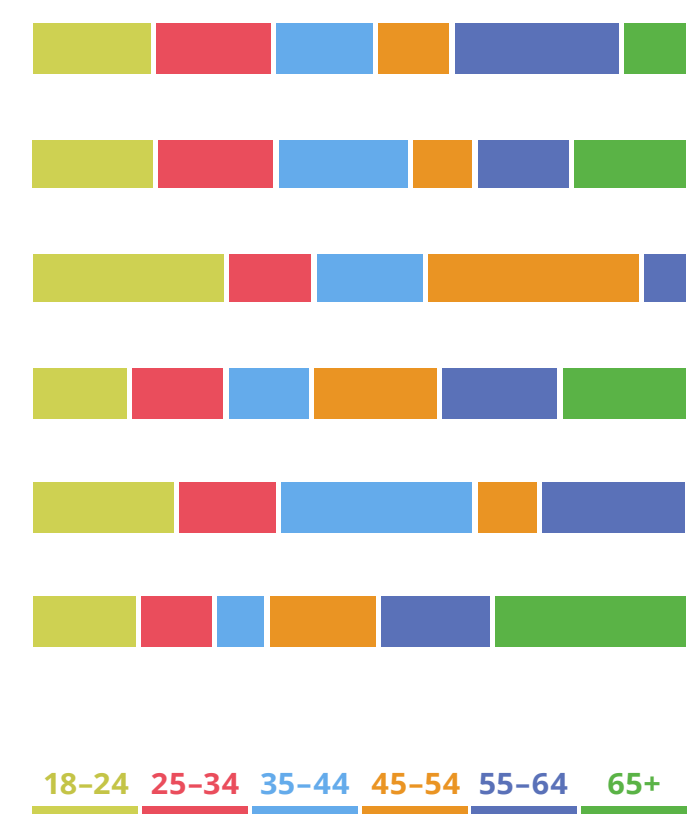
Methods of offline television show discovery in 2017



Breakdown by gender



Breakdown by age



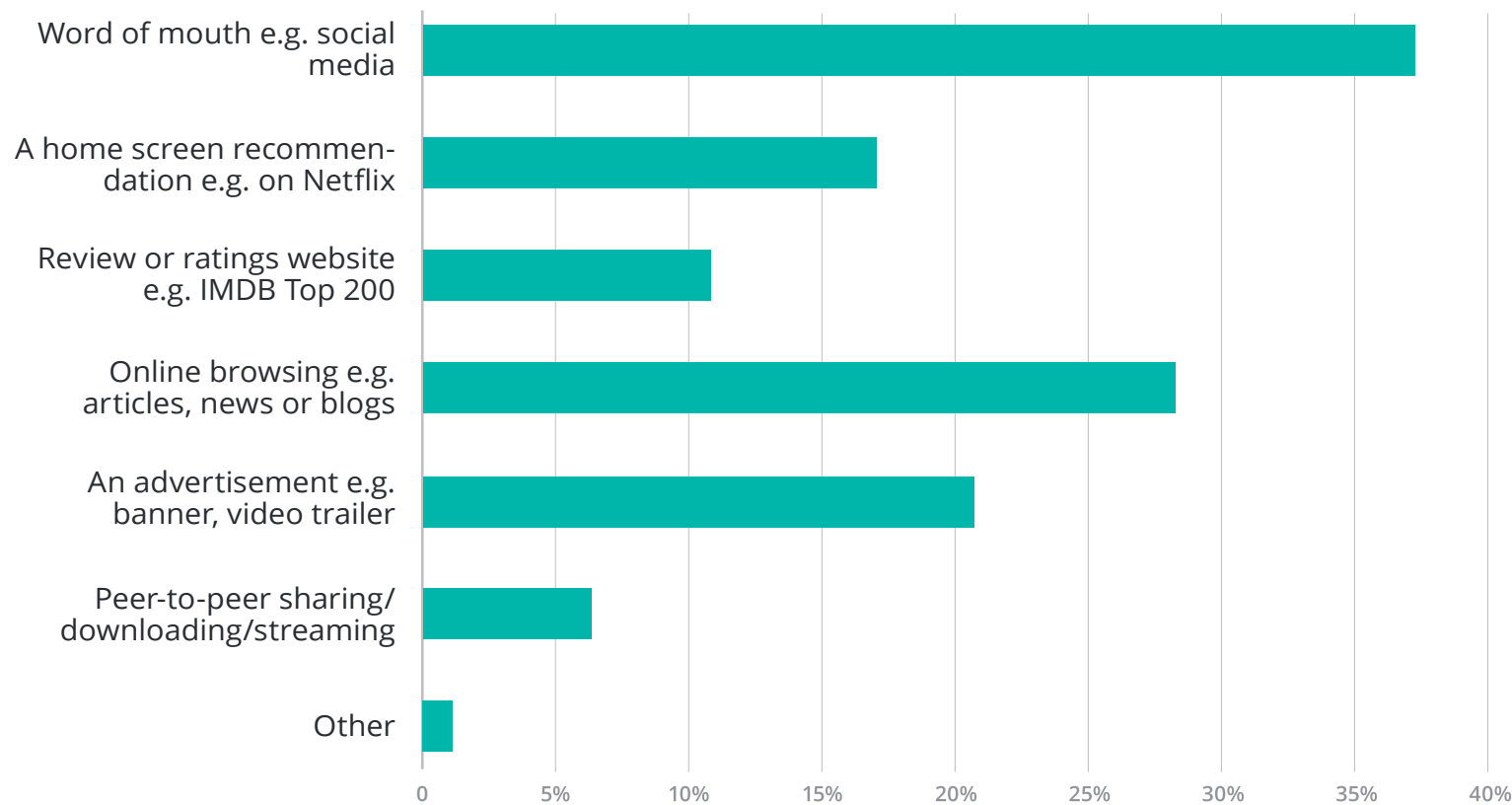
► In Spain, about a third of people find new shows by either word of mouth or television listings/guides.

► Word of mouth is more commonly used by young people, aged 18 to 44, and TV guides are more common with audience members aged 45+. Most methods are used evenly by both genders, but magazine and newspaper reviews are more commonly used by men.

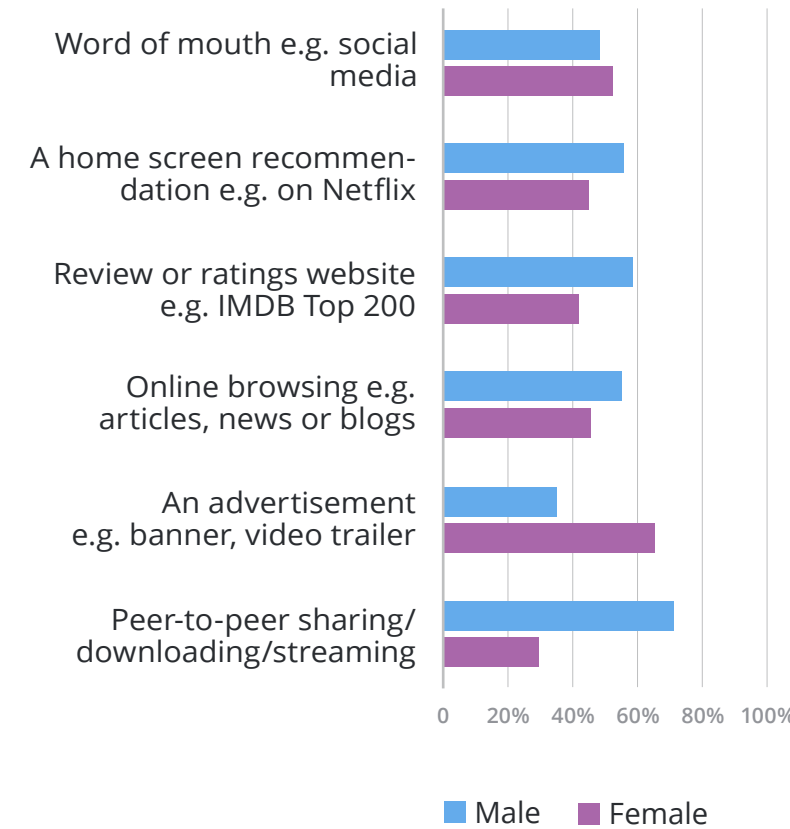
# How audiences discover content online in Spain

December, 2017

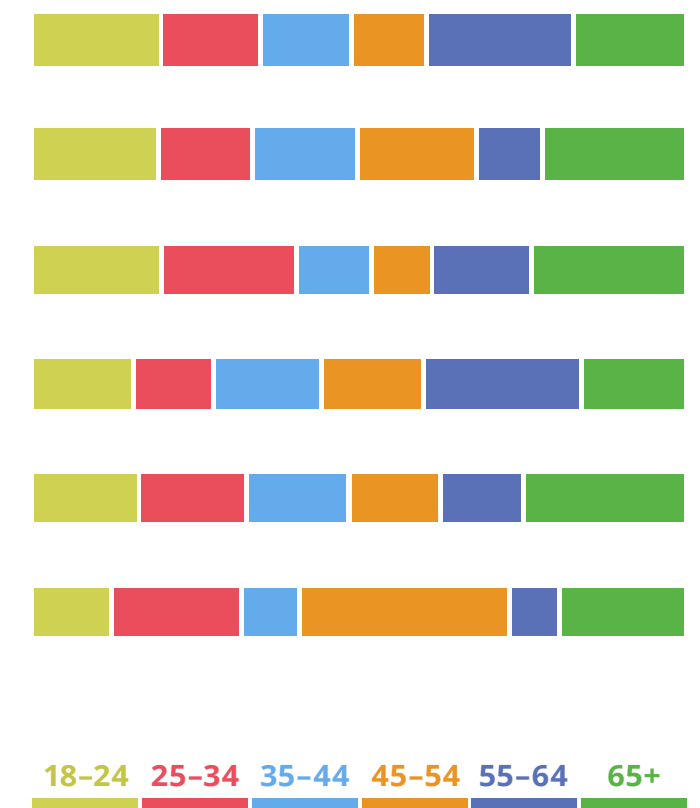
Methods of online television show discovery in 2017



Breakdown by gender



Breakdown by age



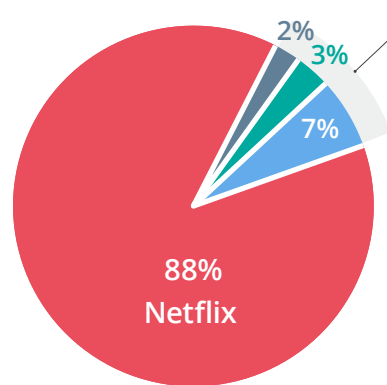
► Online word of mouth, via social media, is used by 37% of people to discover new shows. This method has an even split between the genders and between people under and over age 45.

► Peer-to-peer networks are only used by about 6% of people to find shows: of them, over 70% are men and about 30% are between aged 45 and 54.

# Demand trends in Spain

January–December, 2017 | Total Demand Expressions

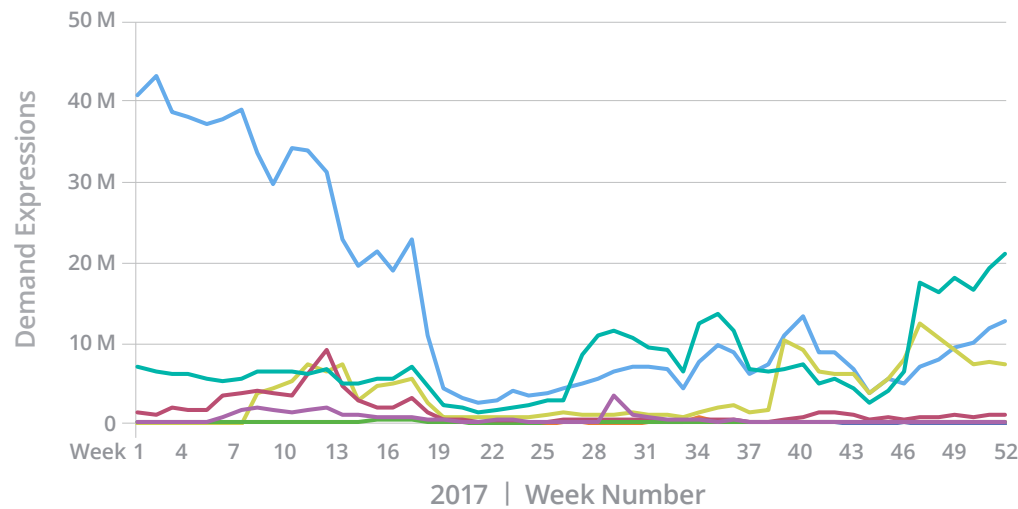
Total share of demand for platforms in 2017



Other Platforms

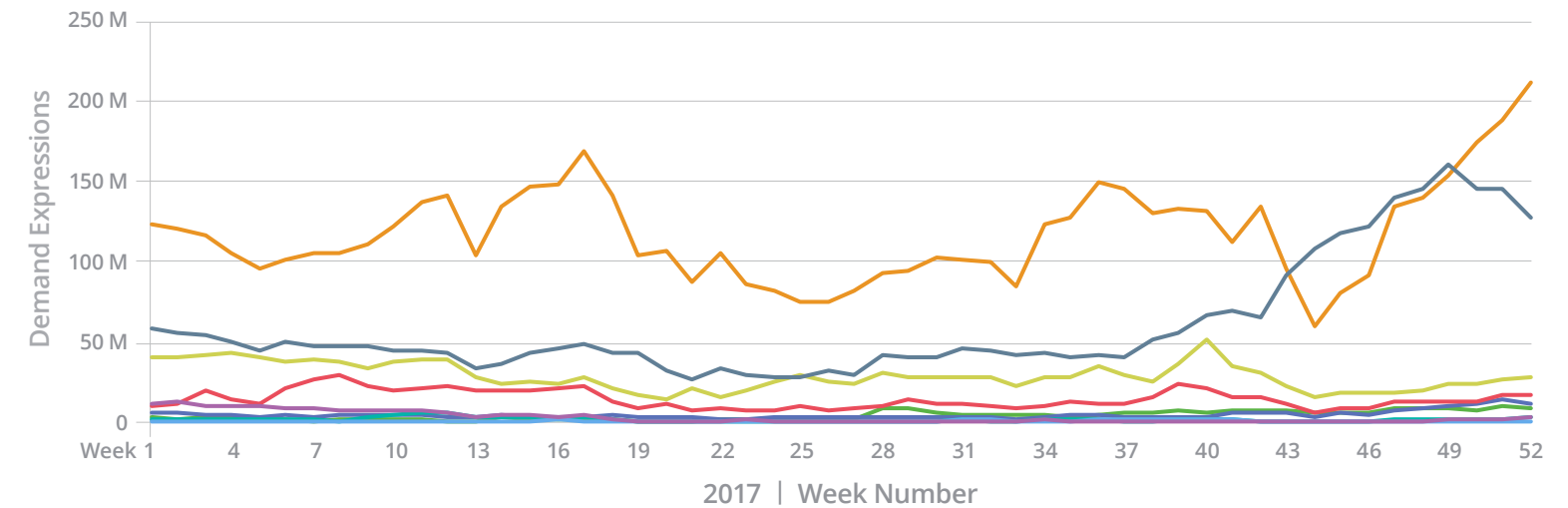
(CBS All Access, Crackle, Facebook, Apple Music, Seeso, Youtube Red)

Total platform demand in 2017 (ex. Netflix)



- Amazon Video
- CBS All Access
- Facebook
- Seeso
- Hulu
- Crackle
- Apple Music
- Youtube Red

Total genre demand for digital original series in 2017



- Animation
- Comedy
- Documentary
- Horror
- Reality
- Children
- Comedy-drama
- Drama
- Science Fiction

- ▶ **Stranger Things** was the most popular digital original series in Spain, followed by the partially Spanish-language **Narcos**. Several other Spanish series — **Las Chicas del Cable**, **Club de Cuervos**, and **Ingobernable** — also ranked within the top 30 digital originals. All these shows aired on Netflix; the first non-Netflix title to rank was Hulu’s **Future Man**.
- ▶ Amazon had high demand at the beginning of the year, but it steeply declined after **The Grand Tour** stopped airing. In contrast, Hulu grew to become the second-most popular platform at the end of the year but its peak demand was about half that of Amazon’s.

- ▶ Despite the large increase in demand for science fiction at the end of the year due to the release of **Stranger Things** and **Black Mirror**, drama also grew to remain the most in-demand genre in Spain.
- ▶ **Veni Vidi Vici**, a comedy from Sweden’s Viaplay, ranked higher than Apple’s **Carpool Karaoke** in Spain.

# Top digital original series in Spain

January–December, 2017 | Average Daily Demand Expressions

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

				Avg. Demand Expressions	
1	<i>Stranger Things</i>	Netflix	Science Fiction	13,709,572	
2	<i>Narcos</i>	Netflix	Drama	7,388,785	
3	<i>13 Reasons Why</i>	Netflix	Drama	6,655,762	
4	<i>Black Mirror</i>	Netflix	Science Fiction	5,653,975	
5	<i>Las Chicas Del Cable</i>	Netflix	Drama	4,462,440	
6	<i>Dark</i>	Netflix	Science Fiction	3,139,411	
7	<i>The Crown</i>	Netflix	Drama	2,878,489	
8	<i>Marvel's The Punisher</i>	Netflix	Drama	2,778,846	
9	<i>Marvel's Iron Fist</i>	Netflix	Drama	2,668,805	
10	<i>Sense8</i>	Netflix	Science Fiction	2,493,304	
11	<i>Mindhunter</i>	Netflix	Drama	2,455,156	
12	<i>Club De Cuervos</i>	Netflix	Comedy-drama	2,304,001	
13	<i>Orange Is The New Black</i>	Netflix	Comedy-drama	2,147,485	
14	<i>House Of Cards</i>	Netflix	Drama	2,070,075	
15	<i>Marvel's The Defenders</i>	Netflix	Drama	2,001,137	
16	<i>Godless</i>	Netflix	Drama	1,274,634	
17	<i>Future Man</i>	Hulu	Science Fiction	1,131,187	
18	<i>Mozart In The Jungle</i>	Amazon Video	Comedy-drama	926,264	
19	<i>Star Trek: Discovery</i>	CBS All Access	Science Fiction	853,593	
20	<i>Ingobernable</i>	Netflix	Drama	785,133	

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

36	<i>Snatch</i>	Crackle	Comedy-drama	364,140	
67	<i>StartUp</i>	Crackle	Drama	129,951	
105	<i>Veni Vidi Vici</i>	Viaplay	Comedy	25,086	
109	<i>Bad Internet</i>	YouTube Red	Comedy	21,260	
110	<i>Carpool Karaoke</i>	Apple Music	Reality	20,921	

# Audience discovery, platform, genre and title demand trends

January–December, 2017

## Mexico

Learn how new TV shows are discovered and how this audience engagement and online activity drives demand for Digital Original series in Mexico.

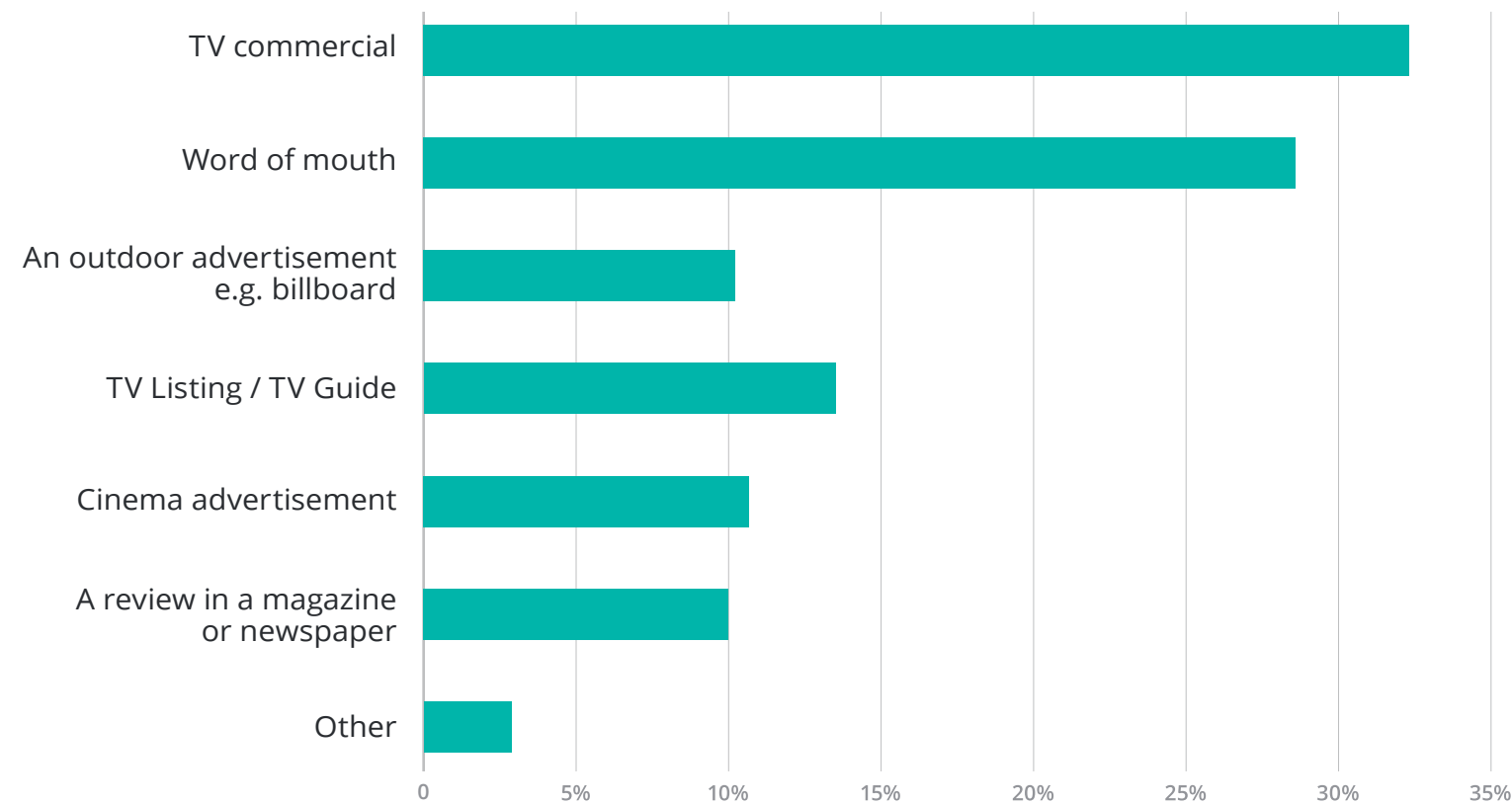
Based on our representative survey, the methods by which people discover new television series, both online and offline, are collated and broken down by gender and age.

The total demand by platform and by genre for SVOD digital original series are tracked over the year and, lastly, the top 20 digital original series are ranked by their average Demand Expressions in each of the ten markets. For titles that aired new episodes in 2017, their demand was averaged during their season (for episodic releases) or over the month after their release (for all-at-once releases). For titles that did not air during 2017, their demand over the entire year was averaged. Unlike the Audience Content Discovery Survey, Demand Expressions measure the entire population and are **not** based on panel data.

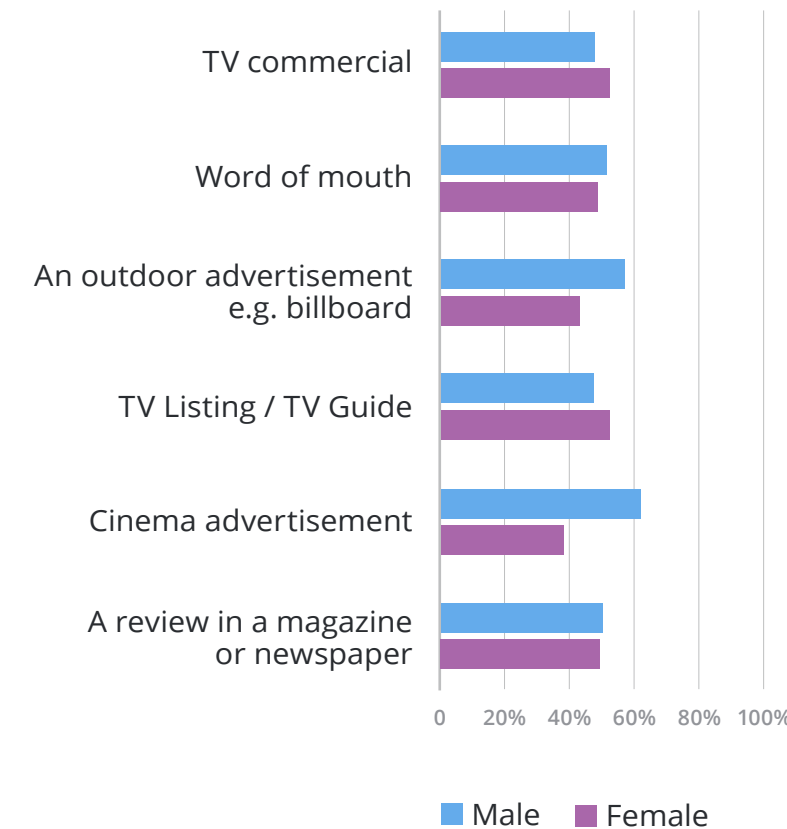
# How audiences discover content **offline** in Mexico

December, 2017

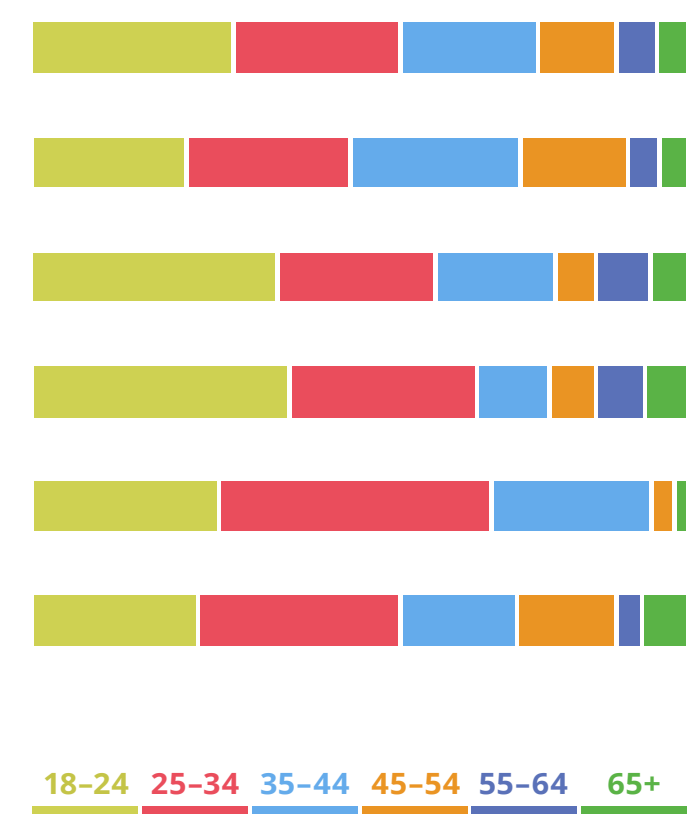
Methods of offline television show discovery in 2017



Breakdown by gender



Breakdown by age



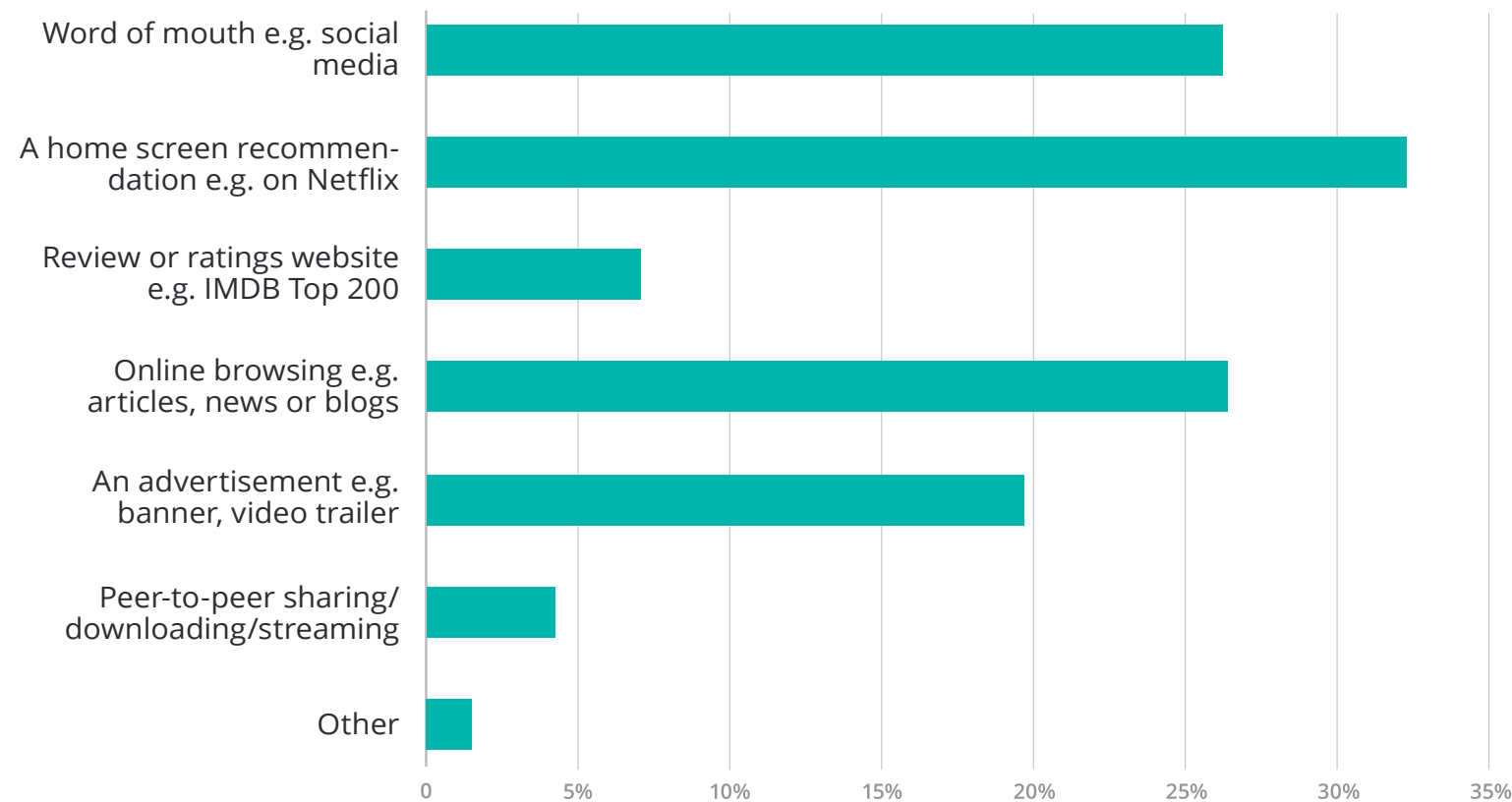
► In Mexico, about a third of people discover new content from television commercials, while about 30% of people use word of mouth.

► Of the 14% of people who used television listings, 40% of them are between 18 and 24, and of the 11% who find shows from cinema advertisements, 60% are men and 40% are between 25 and 34.

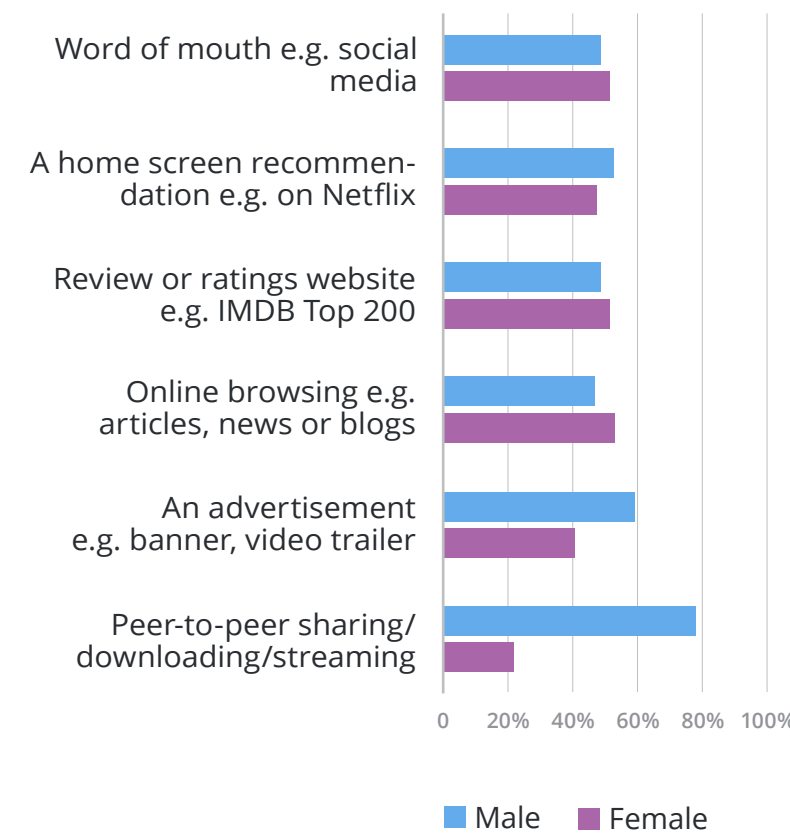
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December, 2017

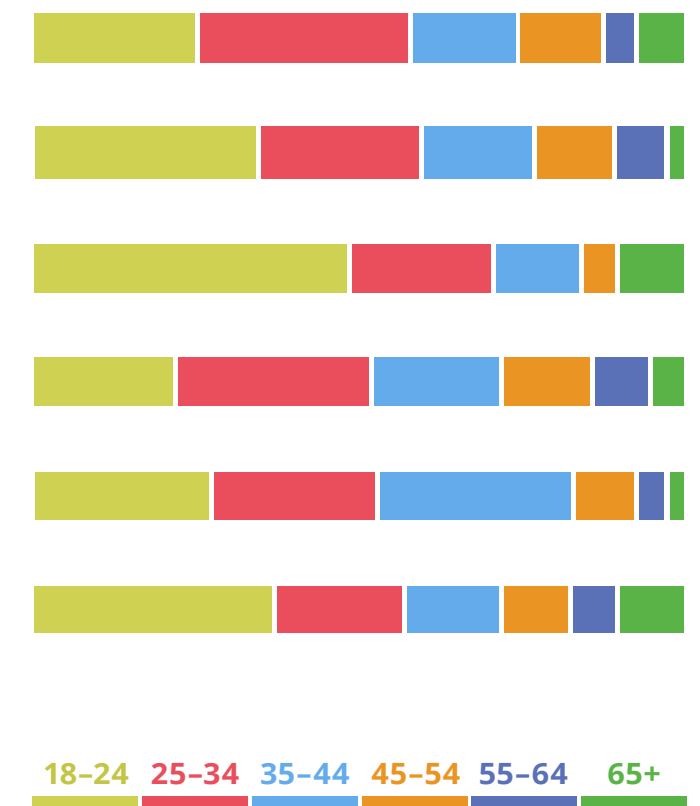
Methods of online television show discovery in 2017



Breakdown by gender



Breakdown by age



► Online, people in Mexico are most likely to discover new shows from recommendations on their viewing platform such as Netflix. Word of mouth, via social media, and online browsing are both used by about 26% of people.

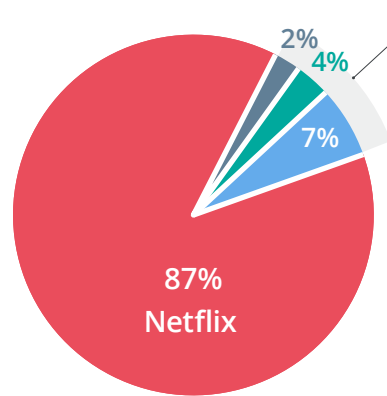
► Of the 4% of people who use peer-to-peer networks to find new content, nearly 80% are men and nearly 40% are between ages 18 and 24.



# Demand trends in Mexico

January–December, 2017 | Total Demand Expressions

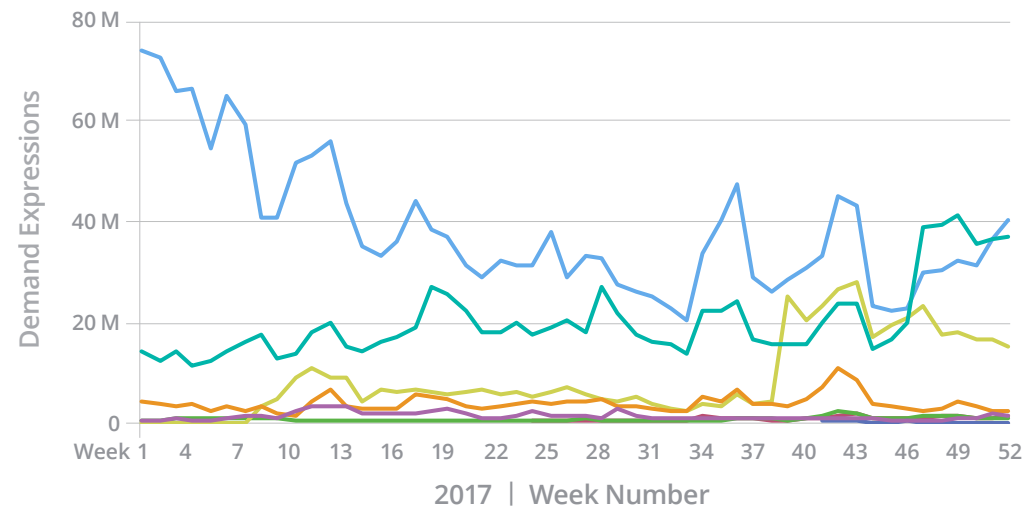
Total share of demand for platforms in 2017



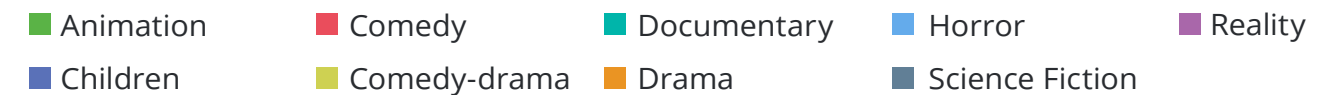
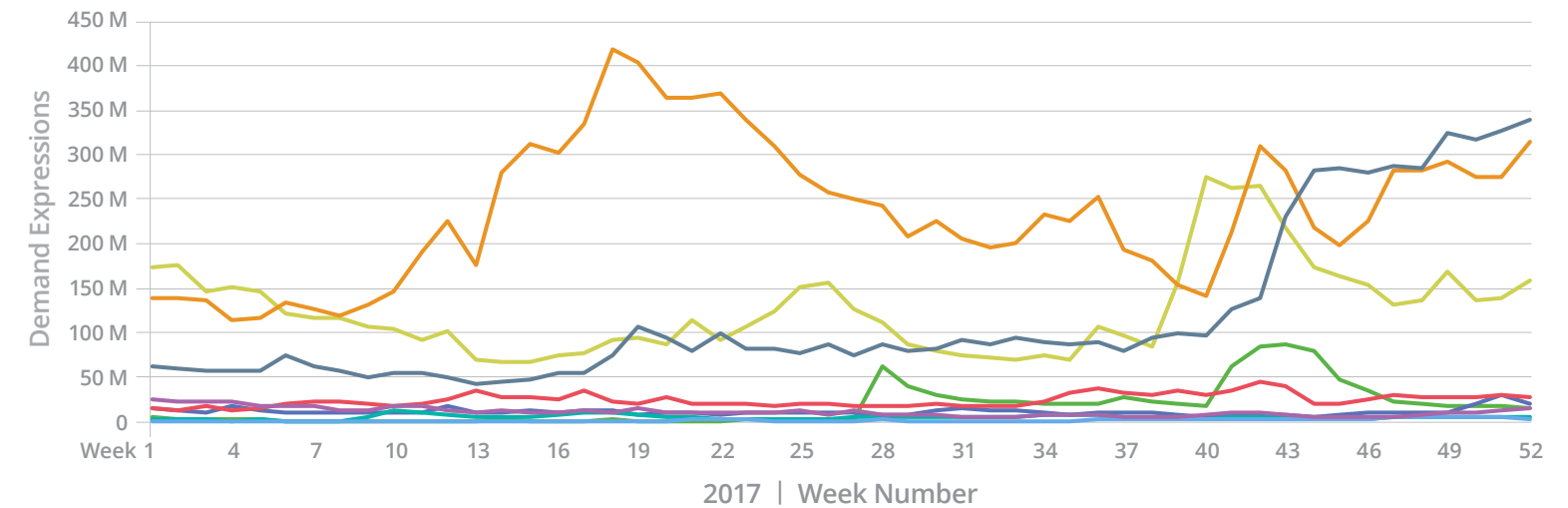
Other Platforms

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

Total platform demand in 2017 (ex. Netflix)



Total genre demand for digital original series in 2017



- ▶ Netflix's *Stranger Things* was the most popular digital original series in Mexico, but the Spanish-language *Club de Cuervos* only had 5% less demand than the global hit. Other Spanish titles *Las Chicas del Cable*, *Narcos*, and *Ingobernable* also ranked within the top 20 digital original series, highlighting the importance of local language content in markets.
- ▶ As the platform with the most titles, and most Spanish-language titles, Netflix dominates the market with 87% of total demand share. The demand from Amazon decreased over the year while the popularity of Hulu increased, and CBS All Access' hit title *Star Trek: Discovery* lifted the platform's demand in quarter 4.

- ▶ Demand for dramas peaked in the middle of the year, but declined slightly, while demand for comedy-dramas (led by *Club de Cuervos*' third season) and science fiction (led by *Stranger Things*' second season) increased towards the end of the year.
- ▶ The Swedish title *Veni Vidi Vici* ranked highly in Mexico as it did in Spain; Spanish speakers responded to this series more strongly than English speakers.

# Top digital original series in Mexico

January–December, 2017 | Average Daily Demand Expressions

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

				Avg. Demand Expressions
1	<i>Stranger Things</i>	Netflix	Science Fiction	31,745,365
2	<i>Club De Cuervos</i>	Netflix	Comedy-drama	29,959,942
3	<i>13 Reasons Why</i>	Netflix	Drama	17,660,930
4	<i>Black Mirror</i>	Netflix	Science Fiction	16,753,655
5	<i>Dark</i>	Netflix	Science Fiction	7,975,051
6	<i>Sense8</i>	Netflix	Science Fiction	7,260,768
7	<i>Orange Is The New Black</i>	Netflix	Comedy-drama	7,014,798
8	<i>Las Chicas Del Cable</i>	Netflix	Drama	6,633,366
9	<i>Marvel's Iron Fist</i>	Netflix	Drama	6,285,535
10	<i>Marvel's The Punisher</i>	Netflix	Drama	5,367,821
11	<i>Castlevania</i>	Netflix	Animation	4,652,432
12	<i>Narcos</i>	Netflix	Drama	4,629,049
13	<i>Mindhunter</i>	Netflix	Drama	3,946,455
14	<i>The Crown</i>	Netflix	Drama	3,386,864
15	<i>House Of Cards</i>	Netflix	Drama	2,981,302
16	<i>Ingobernable</i>	Netflix	Drama	2,754,249
17	<i>Star Trek: Discovery</i>	CBS All Access	Science Fiction	2,340,519
18	<i>Mozart In The Jungle</i>	Amazon Video	Comedy-drama	2,258,632
19	<i>G.L.O.W.</i>	Netflix	Comedy-drama	2,119,685
20	<i>Marvel's Runaways</i>	Hulu	Drama	1,612,833

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

33	<i>The Good Fight</i>	CBS All Access	Drama	936,187
46	<i>StartUp</i>	Crackle	Drama	606,261
82	<i>Veni Vidi Vici</i>	Viaplay	Comedy	217,186
97	<i>Mind Field</i>	YouTube Red	Reality	117,822
105	<i>Comedians In Cars Getting Coffee</i>	Crackle	Reality	89,620

# Audience discovery, platform, genre and title demand trends

January–December, 2017

## Brazil

Learn how new TV shows are discovered and how this audience engagement and online activity drives demand for Digital Original series in Brazil.

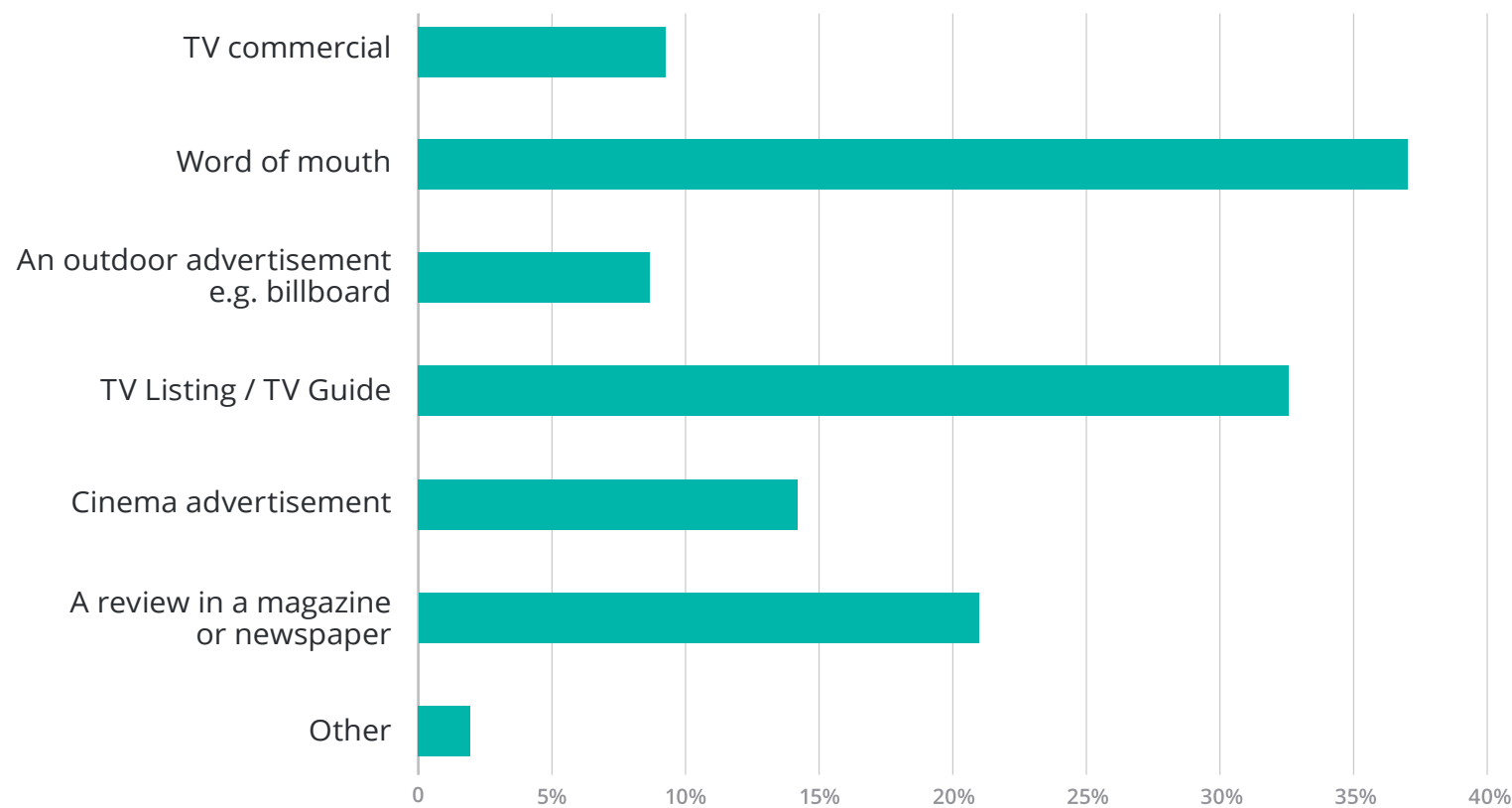
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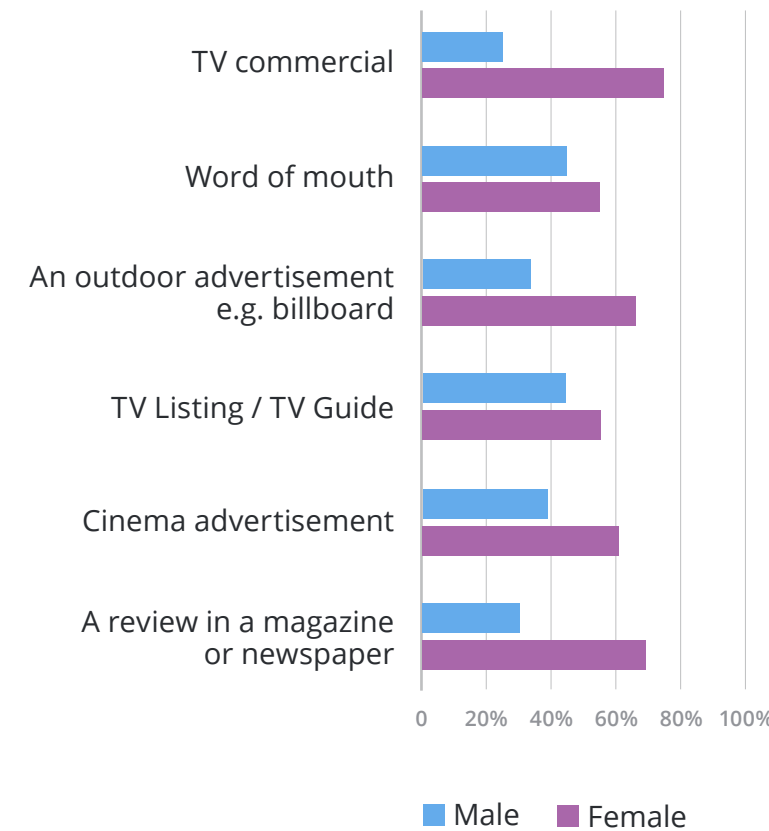
# How audiences discover content **offline** in **Brazil**

December, 2017

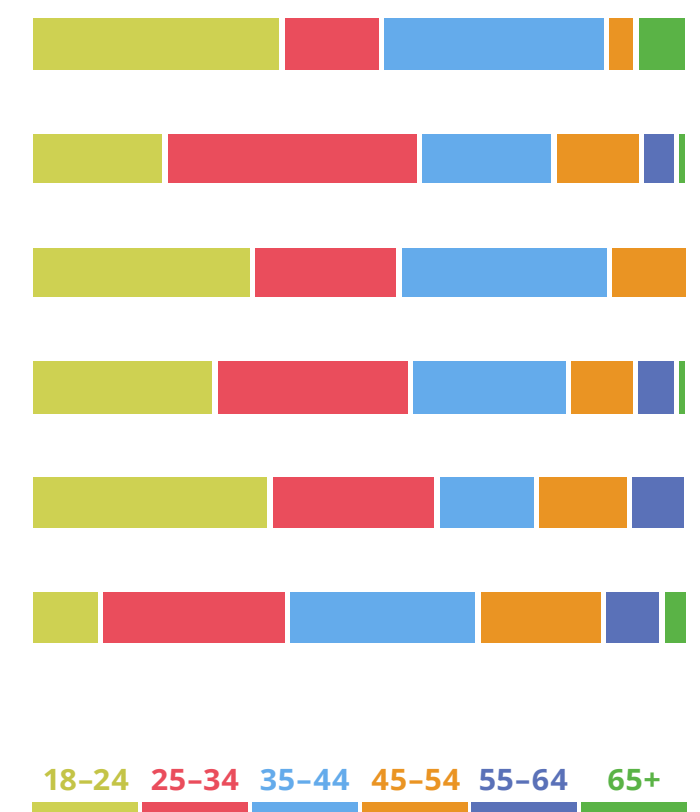
Methods of offline television show discovery in 2017



Breakdown by gender



Breakdown by age



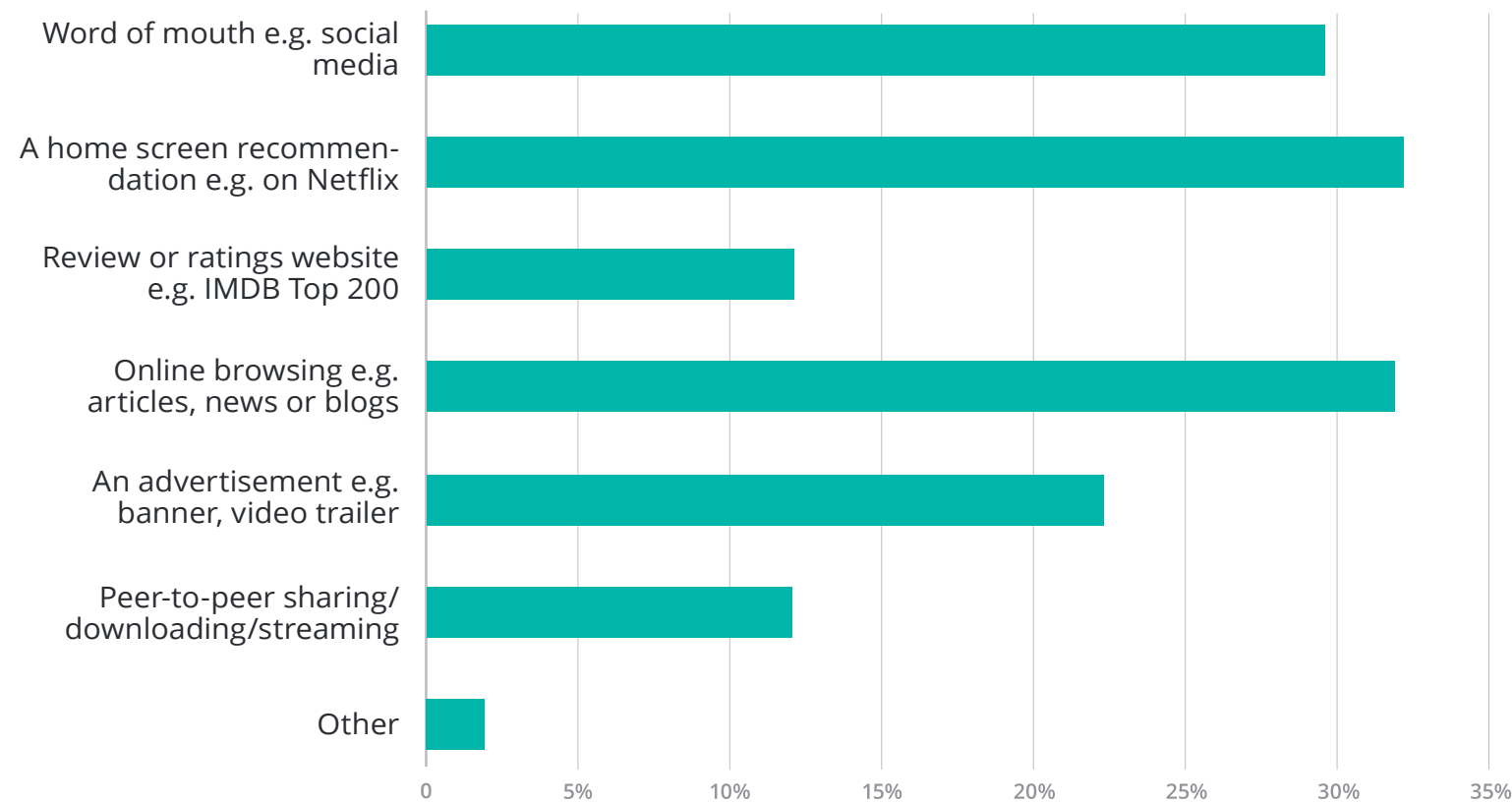
► While television listings and guides are used by nearly a third of people to discover content, less than 10% of people use television commercials.

► About 37% of people in Brazil use word-of-mouth recommendations from friends and family to find out about new shows. This method is most used by younger people: About 40% of people who used word of mouth are aged 25 to 34.

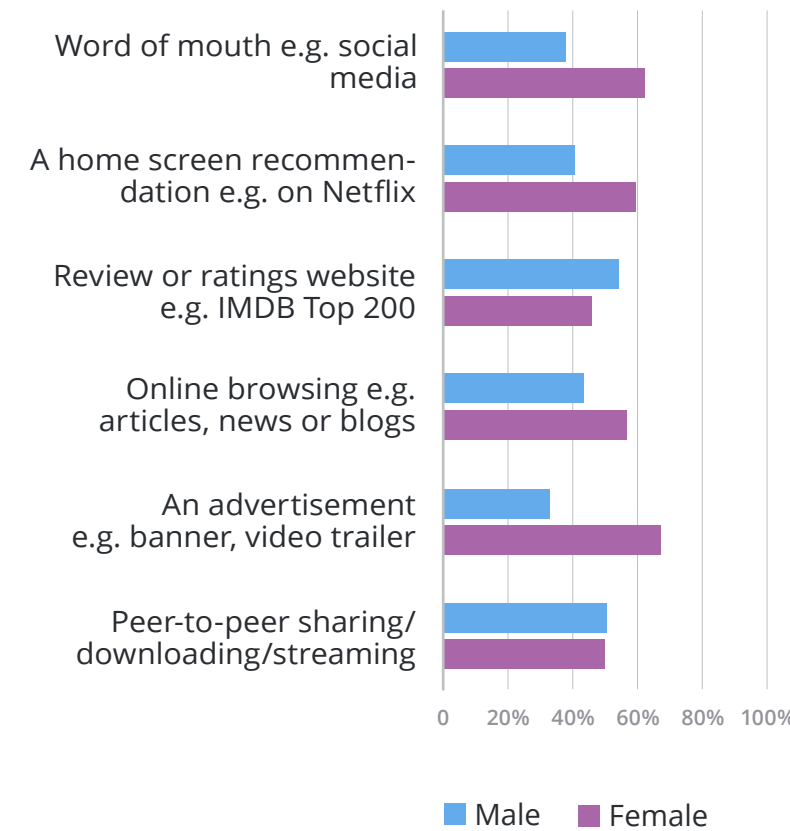
# How audiences discover content online in Brazil

December, 2017

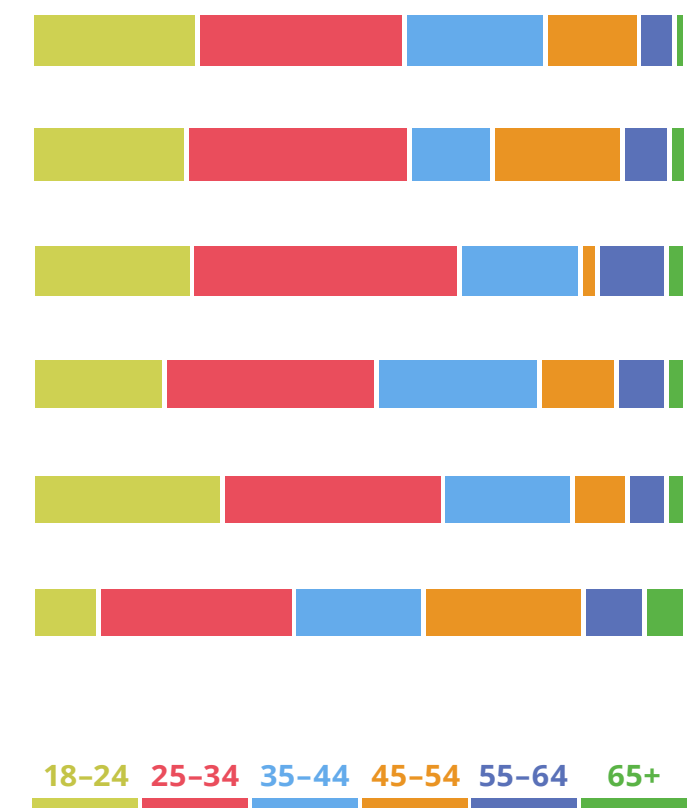
Methods of online television show discovery in 2017



Breakdown by gender



Breakdown by age



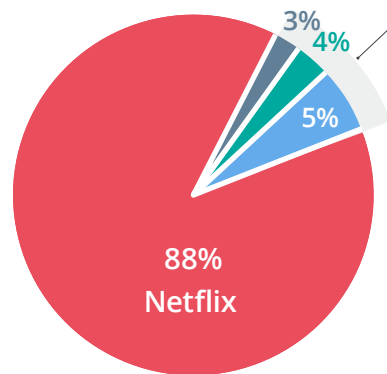
► Recommendations on viewing platforms such as Netflix are used by about 32% of people to find new shows to watch online, closely followed by online browsing which is used by 31.8% of people.

► Online word of mouth via social media are also popular: about 30% of people use this method, and of these people 60% of them are women and 80% are under age 44.

# Demand trends in Brazil

January–December, 2017 | Total Demand Expressions

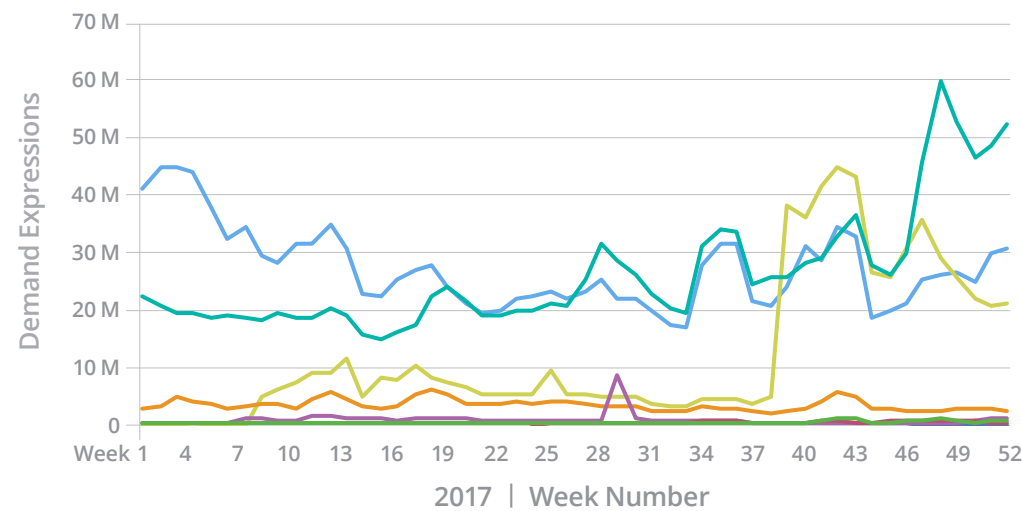
Total share of demand for platforms in 2017



Other Platforms

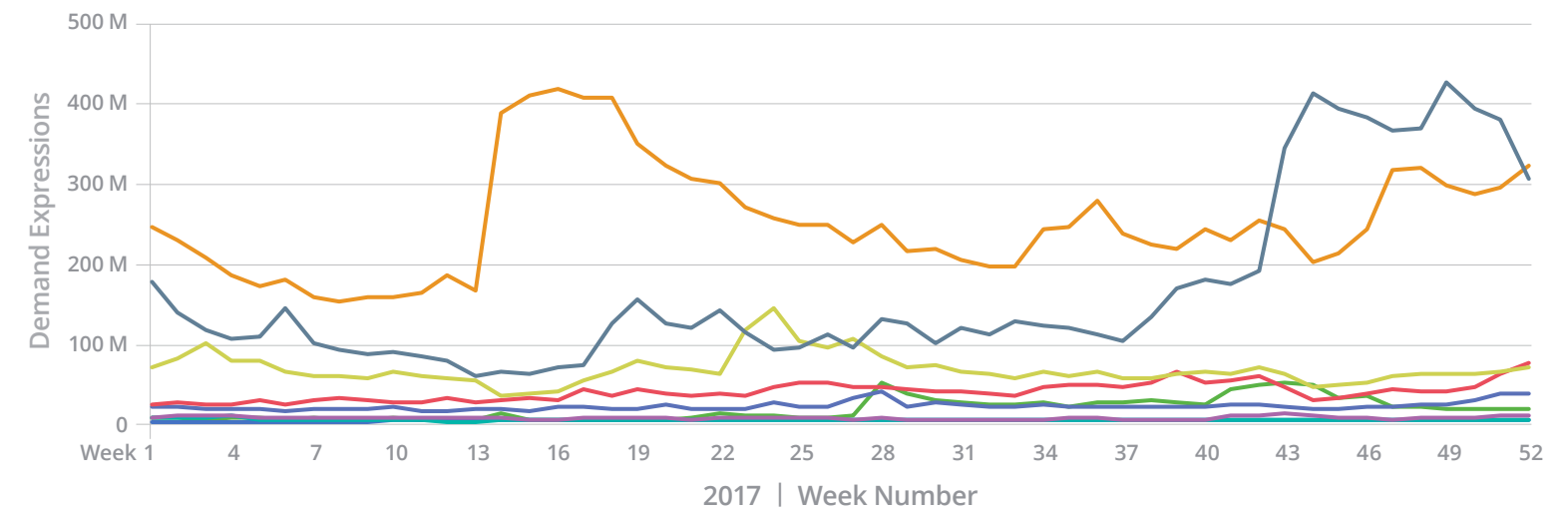
(CBS All Access, Crackle, Facebook, Apple Music, Seeso, Youtube Red)

Total platform demand in 2017 (ex. Netflix)



- Amazon Video
- CBS All Access
- Facebook
- Seeso
- Hulu
- Crackle
- Apple Music
- Youtube Red

Total genre demand for digital original series in 2017



- Animation
- Comedy
- Documentary
- Horror
- Reality
- Children
- Comedy-drama
- Drama
- Science Fiction

- ▶ *Stranger Things* was the most popular digital original series in Brazil, followed by fellow Netflix hit *13 Reasons Why*. The German-language title *Dark* was third, while the most popular non-Netflix title was CBS All Access' *Star Trek: Discovery*, which ranked ninth.
- ▶ Netflix dominates in Brazil with 88% of the total demand for digital original series. While Amazon began the year with about twice as much demand as Hulu, its popularity declined while Hulu's demand grew to be about 40% higher than Amazon's demand at the end of the year.

- ▶ The demand for digital original dramas grew over 2017, but science fiction had the highest peak demand due to the release of *Stranger Things* and *Dark*. Dramas and science fiction titles ended the year with about the same amount of popularity.
- ▶ *Wolf Creek* from Australia's Stan ranked higher in Brazil than Apple's most-well known title, *Carpool Karaoke*.

# Top digital original series in Brazil

January–December, 2017 | Average Daily Demand Expressions

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

				Avg. Demand Expressions
1	<i>Stranger Things</i>	Netflix	Science Fiction	46,544,581
2	<i>13 Reasons Why</i>	Netflix	Drama	31,143,685
3	<i>Dark</i>	Netflix	Science Fiction	12,258,316
4	<i>Sense8</i>	Netflix	Science Fiction	12,219,273
5	<i>Orange Is The New Black</i>	Netflix	Comedy-drama	11,745,852
6	<i>Narcos</i>	Netflix	Drama	7,707,071
7	<i>Marvel's The Punisher</i>	Netflix	Drama	6,590,878
8	<i>The Crown</i>	Netflix	Drama	5,326,985
9	<i>Star Trek: Discovery</i>	CBS All Access	Science Fiction	3,933,936
10	<i>Castlevania</i>	Netflix	Animation	3,524,503
11	<i>Marvel's Iron Fist</i>	Netflix	Drama	2,929,137
12	<i>Marvel's Runaways</i>	Hulu	Drama	2,658,407
13	<i>The Ranch</i>	Netflix	Comedy	2,530,164
14	<i>Black Mirror</i>	Netflix	Science Fiction	2,500,441
15	<i>The OA</i>	Netflix	Drama	2,499,810
16	<i>BoJack Horseman</i>	Netflix	Animation	2,353,102
17	<i>The Last Kingdom</i>	Netflix	Drama	2,320,239
18	<i>Fuller House</i>	Netflix	Comedy	2,213,262
19	<i>Gilmore Girls</i>	Netflix	Comedy-drama	2,032,482
20	<i>A Series Of Unfortunate Events</i>	Netflix	Comedy-drama	1,958,026

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

31	<i>The Good Fight</i>	CBS All Access	Drama	985,984
79	<i>Wolf Creek</i>	Stan	Horror	237,955
105	<i>Mind Field</i>	YouTube Red	Reality	81,485
112	<i>The Art Of More</i>	Crackle	Drama	59,342
114	<i>Carpool Karaoke</i>	Apple Music	Reality	55,758

# Audience discovery, platform, genre and title demand trends

January–December, 2017

## Japan

Learn how new TV shows are discovered and how this audience engagement and online activity drives demand for Digital Original series in Japan.

Based on our representative survey, the methods by which people discover new television series, both online and offline, are collated and broken down by gender and age.

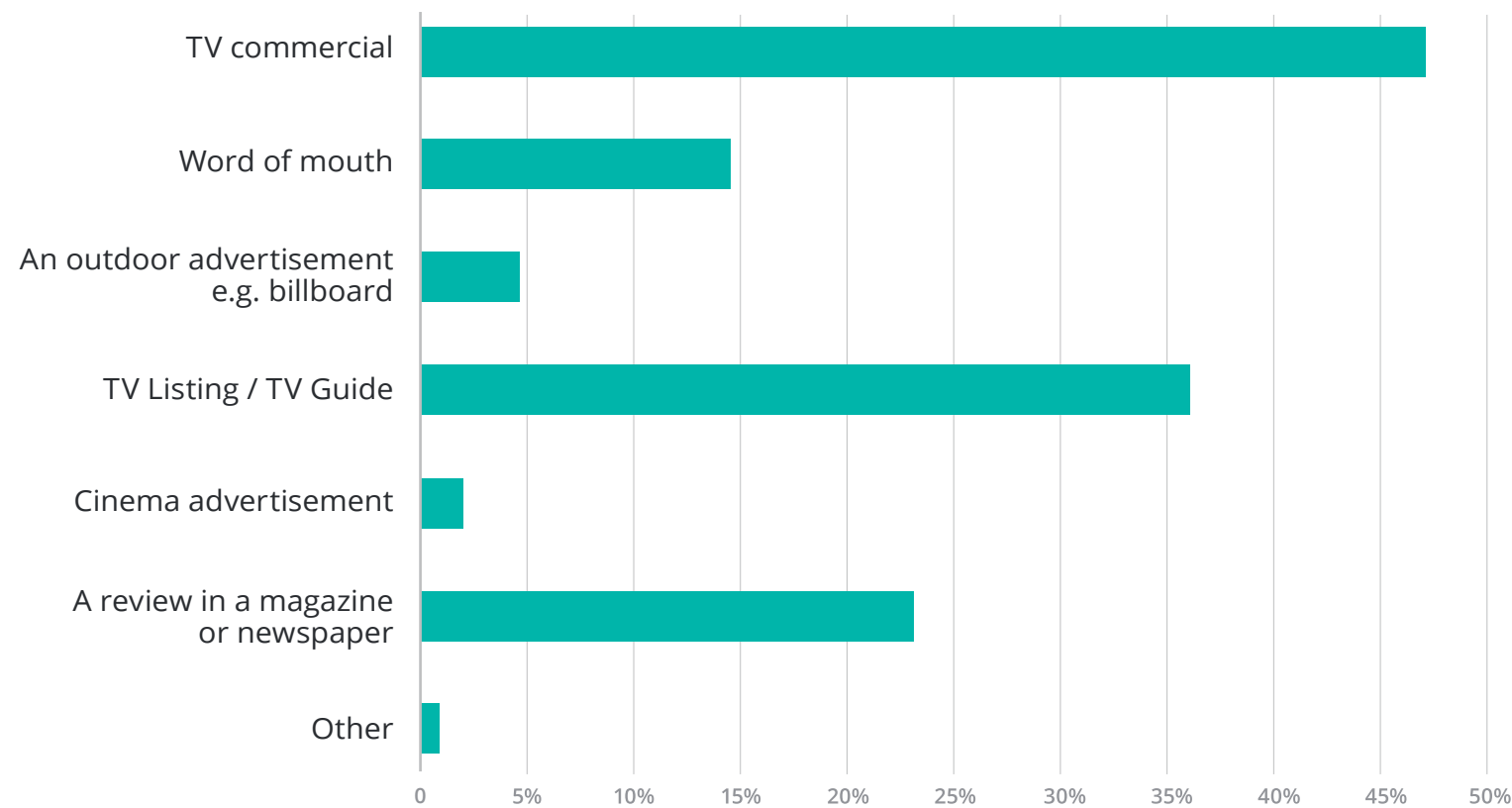
The total demand by platform and by genre for SVOD digital original series are tracked over the year and, lastly, the top 20 digital original series are ranked by their average Demand Expressions in each of the ten markets. For titles that aired new episodes in 2017, their demand was averaged during their season (for episodic releases) or over the month after their release (for all-at-once releases). For titles that did not air during 2017, their demand over the entire year was averaged. Unlike the Audience Content Discovery Survey, Demand Expressions measure the entire population and are **not** based on panel data.



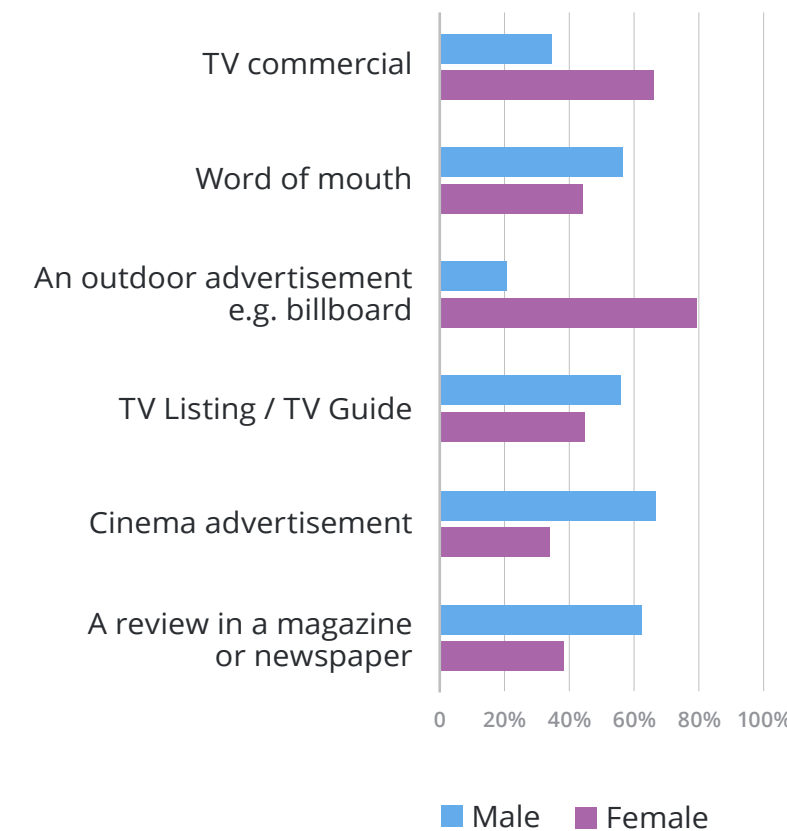
# How audiences discover content **offline** in Japan

December, 2017

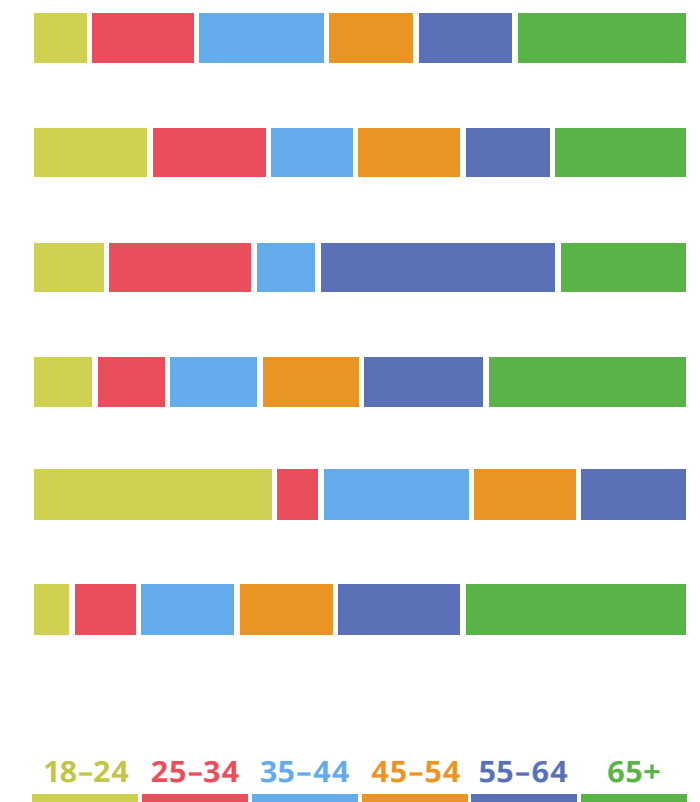
Methods of offline television show discovery in 2017



Breakdown by gender



Breakdown by age



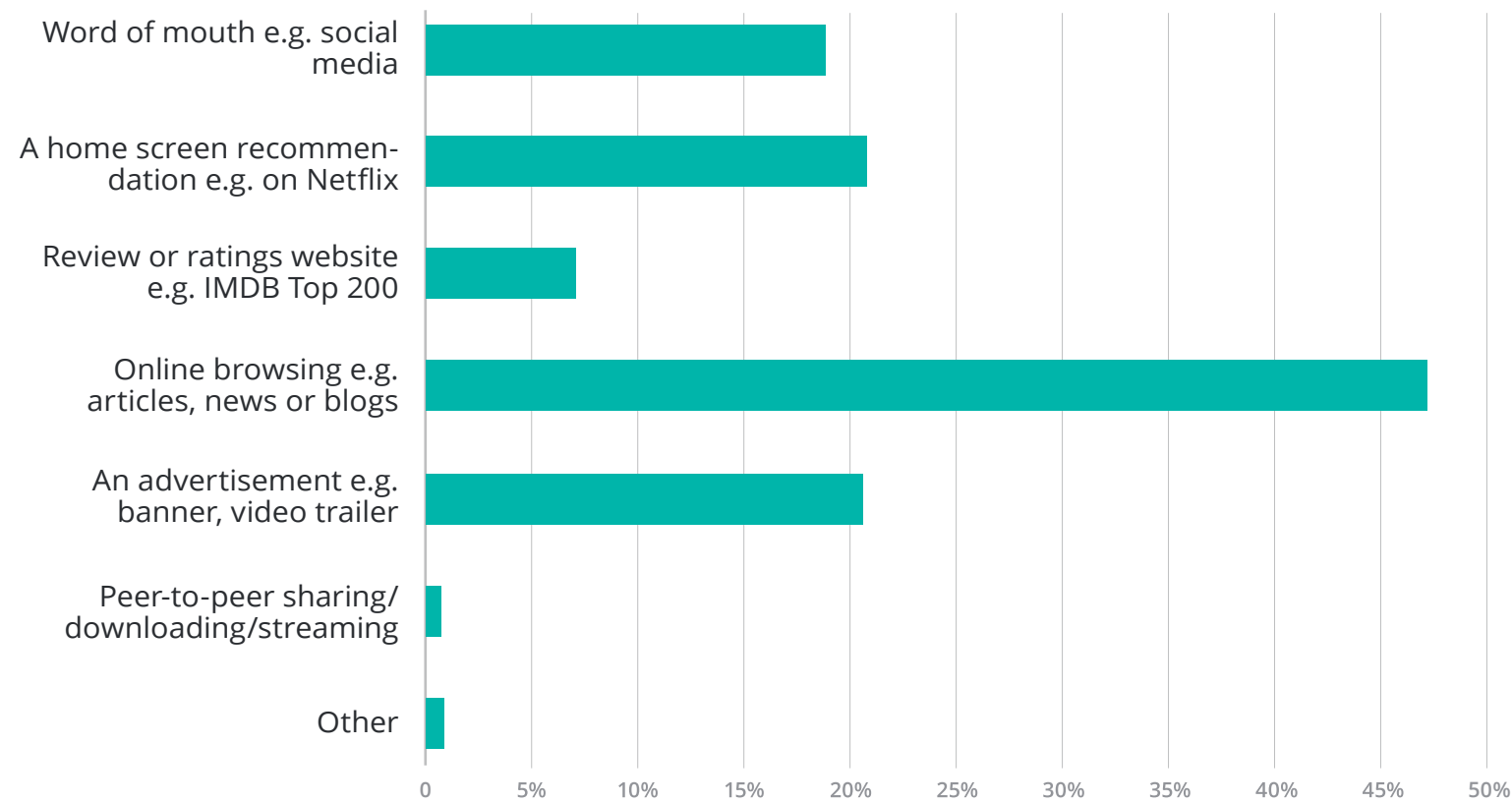
► Nearly half of people in Japan look to television commercials to find new shows to watch, and of these people, over 60% of them are women. TV guides and listings are also popular, with 36% of people using them, the majority of which are men.

► While only 2% of people discover new content from cinema advertisements, nearly 40% of those people are aged 18 to 24.

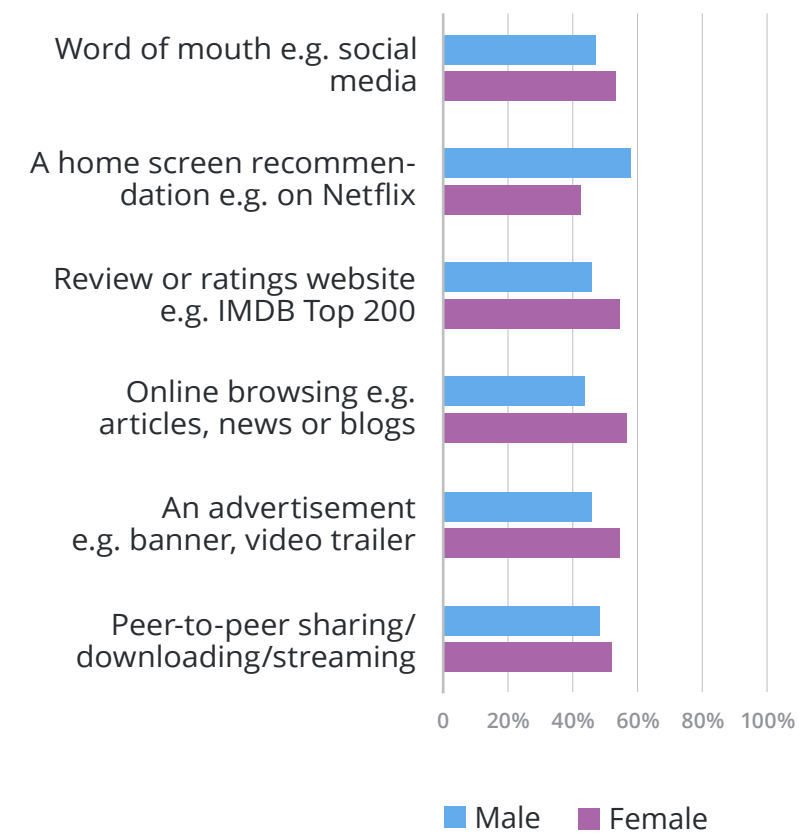
# How audiences discover content online in Japan

December, 2017

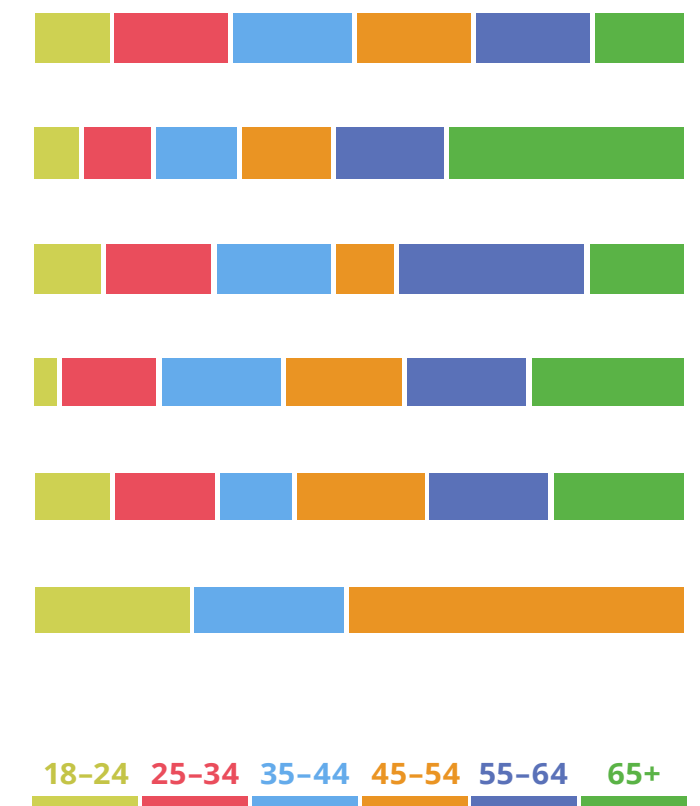
Methods of online television show discovery in 2017



Breakdown by gender



Breakdown by age



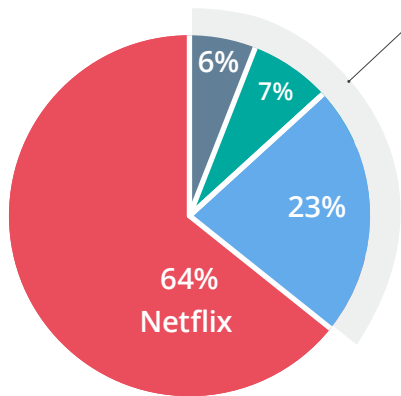
► Recommendations on viewing platforms such as Netflix and online advertisements are used by 20% of audience members, while only 18% use online word of mouth on social media.

► Browsing articles, news, blogs, etc. is by far the most common method of discovering new TV shows online, accounting for 47% of people. This method is evenly split between men and women but is mostly used by people aged 45+.

# Demand trends in Japan

January–December, 2017 | Total Demand Expressions

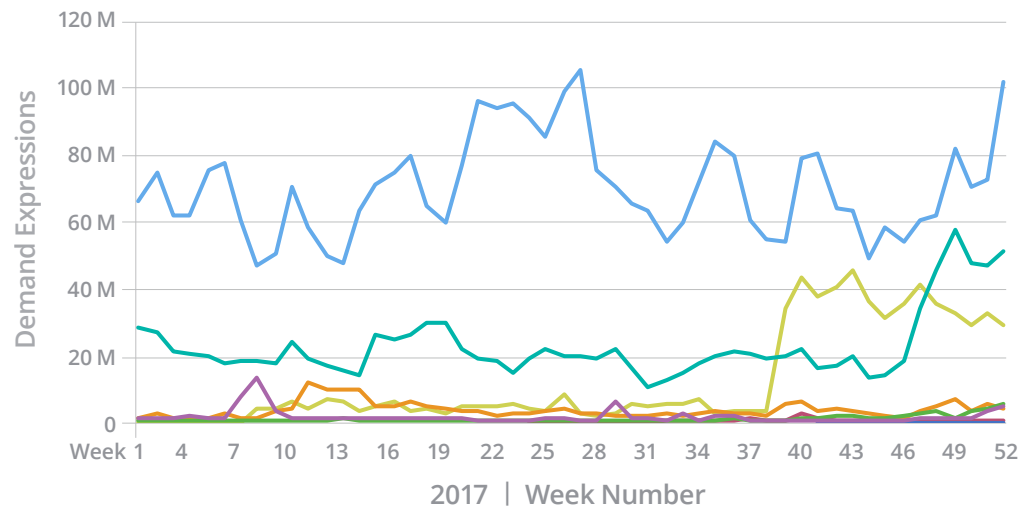
Total share of demand for platforms in 2017



Other Platforms

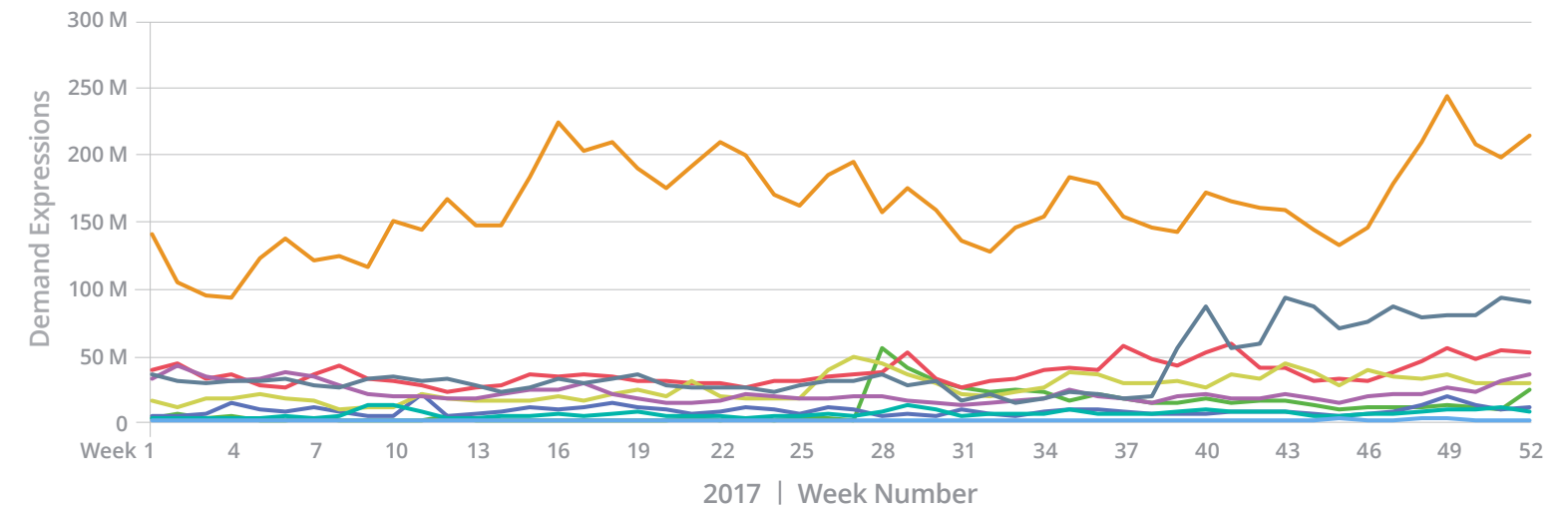
(CBS All Access, Crackle, Facebook, Apple Music, Seeso, Youtube Red)

Total platform demand in 2017 (ex. Netflix)



- Amazon Video
- CBS All Access
- Facebook
- Seeso
- Hulu
- Crackle
- Apple Music
- Youtube Red

Total genre demand for digital original series in 2017



- Animation
- Comedy
- Documentary
- Horror
- Reality
- Children
- Comedy-drama
- Drama
- Science Fiction

- ▶ As in many other markets, *Stranger Things* was the most popular digital original series in Japan, followed by CBS All Access' *Star Trek: Discovery*. Several Japanese titles ranked highly as well: The anime-inspired *Castlevania* was fourth, *Kamen Riders Amazons* was sixth, and *Midnight Diner: Tokyo Stories* was 21<sup>st</sup>.
- ▶ Netflix had 64% demand share for digital original series in Japan due to a greater-than-average demand share for Amazon. Unlike many other markets, where Amazon's demand declined over 2017, it remained steady in Japan. CBS All Access and Hulu had increased demand from *Star Trek: Discovery* and *Marvel's Runaways*, respectively, but these platforms did not have as much popularity as Amazon.

- ▶ Despite the rise in popularity of the science fiction genre after the release of *Stranger Things* and *Star Trek: Discovery*, drama remained the most popular genre in Japan for the entirety of 2017.
- ▶ YouTube Red's *Mind Field* ranked higher in Japan than Dan Harmon's *Harmonquest* or Apple's *Carpool Karaoke*.

# Top digital original series in Japan

January–December, 2017 | Average Daily Demand Expressions

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

				Avg. Demand Expressions	
1	<i>Stranger Things</i>	Netflix	Science Fiction	5,011,783	
2	<i>Star Trek: Discovery</i>	CBS All Access	Science Fiction	4,604,086	
3	<i>Marvel's Iron Fist</i>	Netflix	Drama	4,555,986	
4	<i>Castlevania</i>	Netflix	Animation	4,508,269	
5	<i>Marvel's The Punisher</i>	Netflix	Drama	3,636,870	
6	<i>Kamen Rider Amazons</i>	Amazon Video	Drama	3,424,993	
7	<i>G.L.O.W.</i>	Netflix	Comedy-drama	2,903,299	
8	<i>Narcos</i>	Netflix	Drama	2,668,300	
9	<i>House Of Cards</i>	Netflix	Drama	2,578,646	
10	<i>Black Mirror</i>	Netflix	Science Fiction	2,299,709	
11	<i>The Grand Tour</i>	Amazon Video	Reality	2,060,618	
12	<i>Marvel's Runaways</i>	Hulu	Drama	1,952,405	
13	<i>Ozark</i>	Netflix	Drama	1,595,416	
14	<i>The Crown</i>	Netflix	Drama	1,543,143	
15	<i>Abstract: The Art Of Design</i>	Netflix	Documentary	1,535,760	
16	<i>Santa Clarita Diet</i>	Netflix	Comedy	1,500,836	
17	<i>13 Reasons Why</i>	Netflix	Drama	1,470,055	
18	<i>Orange Is The New Black</i>	Netflix	Comedy-drama	1,391,743	
19	<i>Fuller House</i>	Netflix	Comedy	1,245,512	
20	<i>American Vandal</i>	Netflix	Comedy	1,218,621	

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

43	<i>The Good Fight</i>	CBS All Access	Drama	573,072	
54	<i>StartUp</i>	Crackle	Drama	388,277	
76	<i>Mind Field</i>	YouTube Red	Reality	243,682	
112	<i>Harmonquest</i>	Seeso	Comedy	83,468	
114	<i>Carpool Karaoke</i>	Apple Music	Reality	81,655	

# Methodology for Averaging Demand

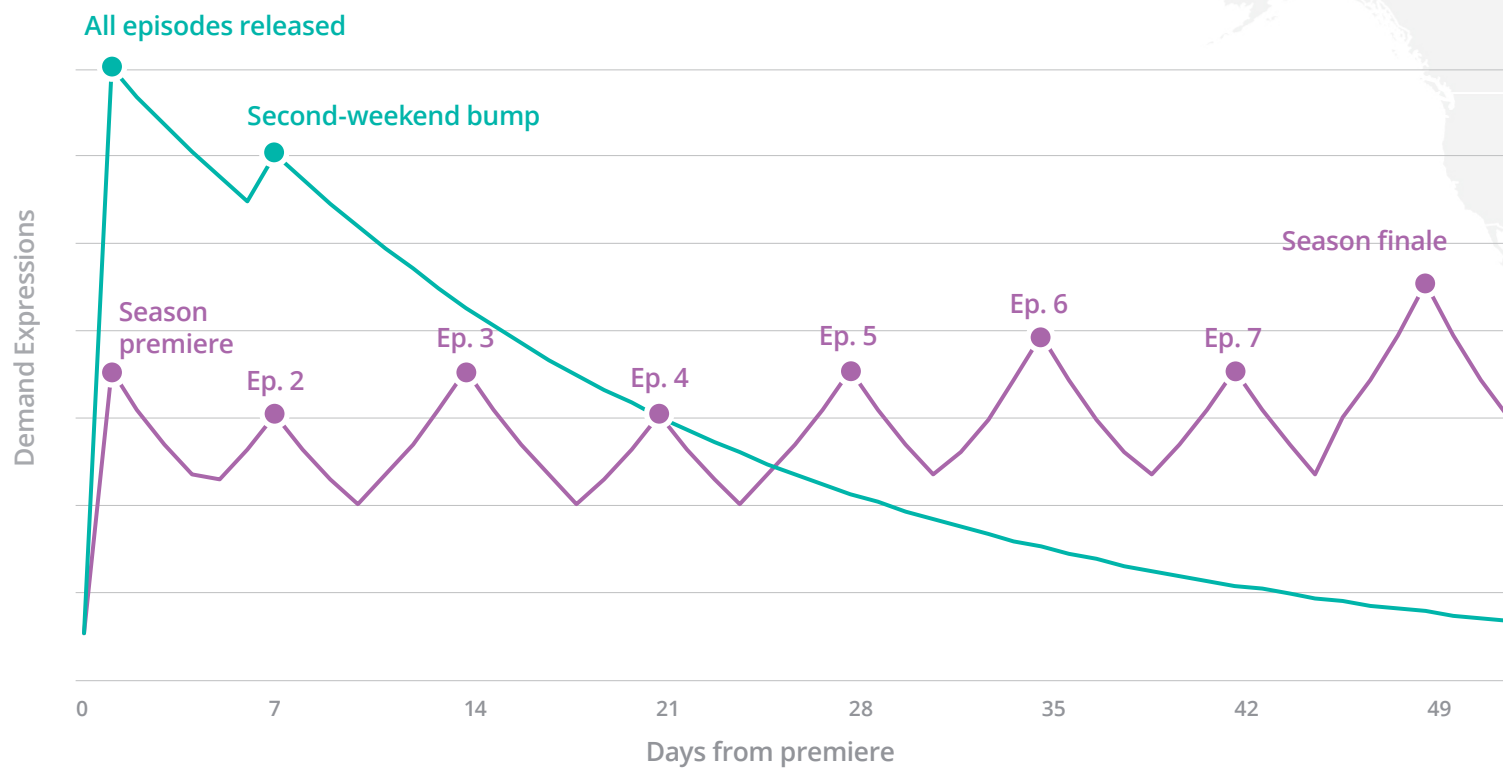
## Simulated demand for all-at-once and episodic releases

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

- Amazon Video
- Crackle
- Netflix
- YouTube Red

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

- Hulu
- CBS All Access
- Apple Music



- ▶ The way in which an SVOD platform releases new episodes of its digital original series affects how the demand for these titles develop.
- ▶ Netflix pioneered the all-at-once method, where all episodes are released on a single day. This release method helped popularize binge-watching as viewers did not have to wait a week to watch the next episode; however, it has the side-effect of having demand for the show decline immediately after release. There is often a slight increase in demand during the second weekend after release as more people finish the season, but generally demand for shows plateau in about one month.
- ▶ In contrast, the episodic release schedule maintains demand throughout the season as people keep returning each week, but its premiere demand may not be as high because only one episode is available.

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

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

# Methodology for audience content discovery survey

December, 2017

**Parrot Analytics** conducted two surveys in **10 markets** with 500 respondents each, for a total of n=10,000 across all surveys and territories. Each survey asked a single question about how the person discovered new television content to watch and gave several standard answers, of which the respondents could choose multiple. Write-in answers were collected into the "Other" category. The text of the questions and answers were translated into each country's primary language, and read as follows:

## SURVEY 1

### **When not online, how do you discover new TV shows to watch?**

1. TV commercial
2. Word of mouth
3. An outdoor advertisement e.g. billboard
4. TV Listing / TV Guide
5. Cinema advertisement
6. A review in a magazine or newspaper
7. Other

## SURVEY 2

### **When online, how do you discover new TV shows to watch?**

1. Word of mouth e.g. social media
2. A home screen recommendation e.g. on Netflix
3. Review or ratings website e.g. IMDB Top 200
4. Online browsing e.g. articles, news or blogs
5. An advertisement e.g. banner, video trailer
6. Peer-to-peer sharing/downloading/streaming
7. Other

The options for the online discovery were designed to cover many major online platforms, which are some of the same platforms on which Parrot Analytics tracks demand activity. For example, as well as other sources Parrot Analytics demand data incorporates both social media and video streaming data; by including both options in the survey, we can determine which demand platforms were used for the discovery of new titles.

For more information on Google Surveys, please refer to the whitepaper [here](#).

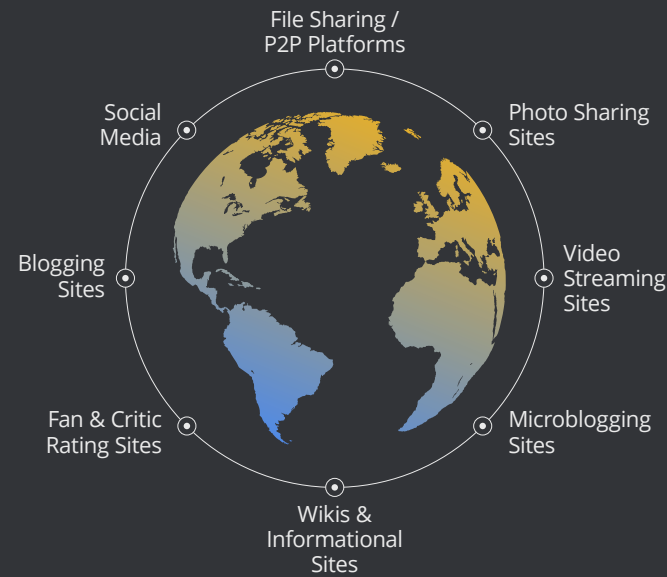
Note: Here we have explained the methodology used for our specific study of online and offline audience content discovery preferences, which was based on a global survey carried out by Parrot Analytics. It must be noted, however, that our Demand Expressions metric underlying our global tv demand measurement does not use sampling extrapolation. Instead, our global demand measurement system captures all known activities from the total population, in all markets, in real-time.

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

**DOWNLOAD**



# Global TV Demand Measurement



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*<sup>TM</sup>

*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.



## *Demand Expressions*<sup>®</sup>

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

### Characteristics of *Demand Expressions*<sup>®</sup>:

- ▶ 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*<sup>®</sup> a title can generate in a market.

## About Parrot Analytics

January–December, 2017 | Total Demand Expressions

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

**Parrot Analytics** captures an unprecedented spectrum of actual fan and audience behavior including video streaming consumption, social media, blogging platforms, file-sharing and peer-to-peer consumption spanning 249 countries. This enables media companies, for the very first time, to understand audience demand for content across all content distribution platforms in all markets around the world.

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

For more information, visit [parrotanalytics.com](http://parrotanalytics.com)



# The Global TV Demand Measurement Standard

Use global demand data to stack content negotiations in your favor. Schedule a software demo and learn how you can increase the value extracted from global content deals.

**BOOK DEMO**

