



EUROPE | JANUARY – AUGUST 2021

Battle Studies:

News from the Frontlines of the Streaming Wars in Europe

mipcom



SPECIAL REPORT



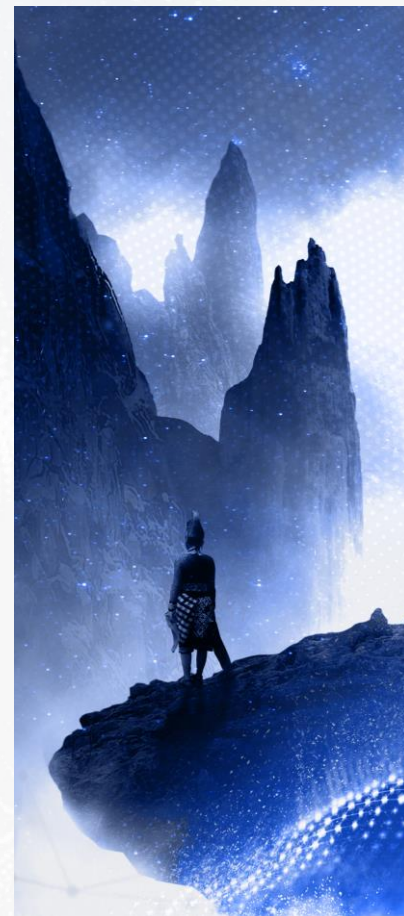
Against the backdrop of a rapidly changing world, the TV industry has been forced to adapt. An increasing number of platforms are ratcheting up competition for audience attention that is already stretched thin.

The challenge of understanding what audiences want has never been so complex, but higher stakes mean greater rewards for those able to navigate the new industry landscape.

At Parrot Analytics, we apply behavioral economics to measure today's digital attention economy so we can answer those questions and provide visibility into audiences in Europe and around the world.

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EXECUTIVE SUMMARY

“ In today’s attention economy, you can only anticipate content trends by continuously measuring how content and talent from anywhere in the world resonate with country-specific audiences. ”



Alejandro J Rojas
Director of Applied Analytics
Parrot Analytics

Germany

Steady growth in demand for original content from Apple TV+ has put it in a strong position in Germany where it recently surpassed the share of demand for Hulu original series.

Spain

The streaming landscape in Spain is unique. Strong demand for originals from local platforms Movistar+ and ATRESPlayer has cut into the demand share for content from other players.



RETHINKING THE TV BUSINESS

France

French audiences have high demand for animated content. In particular, anime captures more demand here than in other markets in the region.

United Kingdom

Documentary content succeeds in the UK. Not only do audiences here have well above average demand for the genre but British documentaries have caught the attention of global audiences.

Sweden

Swedish audiences have some of the highest demand for reality content in the region. This market’s 14.4% demand share for reality is +33% above the global average for this genre.

Turkey

Demand for original content from both Disney+ and Netflix is high in Turkey. The streaming wars look more like a battle between these two giants in this market.

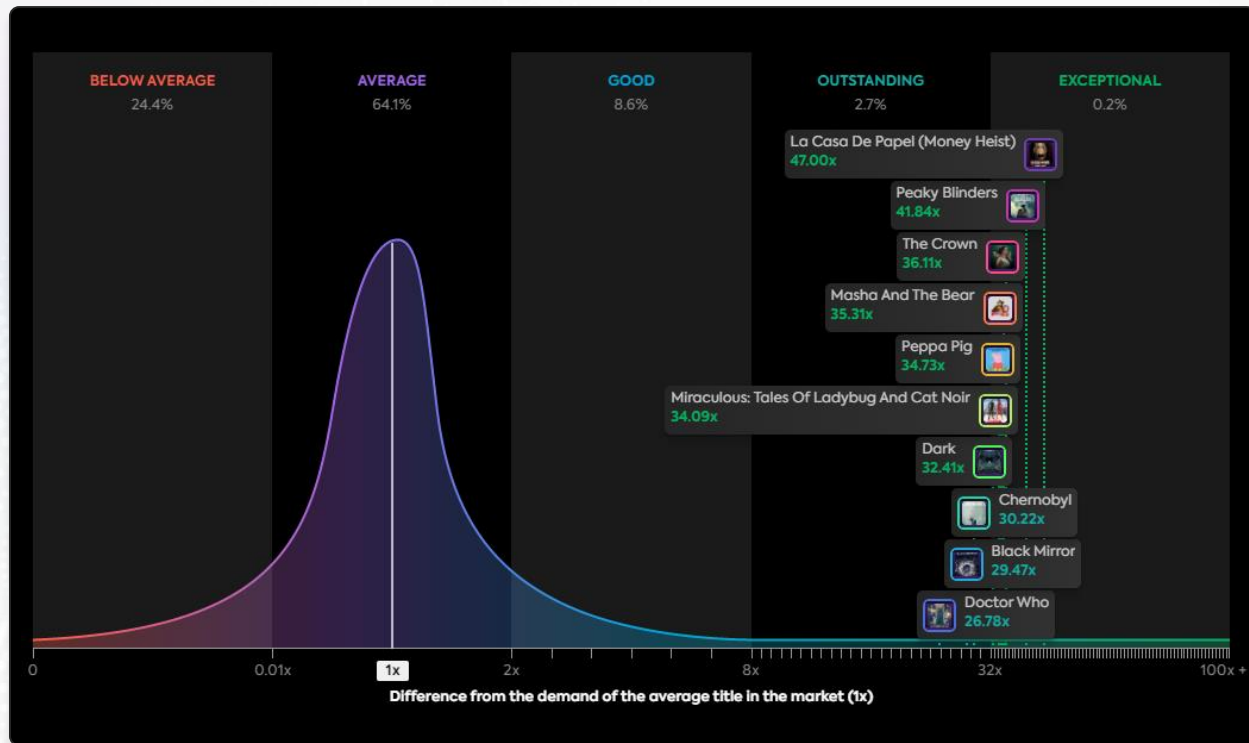




EUROPEAN CONTENT EXPORT SUCCESS

WHICH CONTENT IS SUCCESSFULLY EXPORTED FROM EUROPE TO THE WORLD?

Most Globally In-Demand Content from Europe (Jan – Aug 2021)

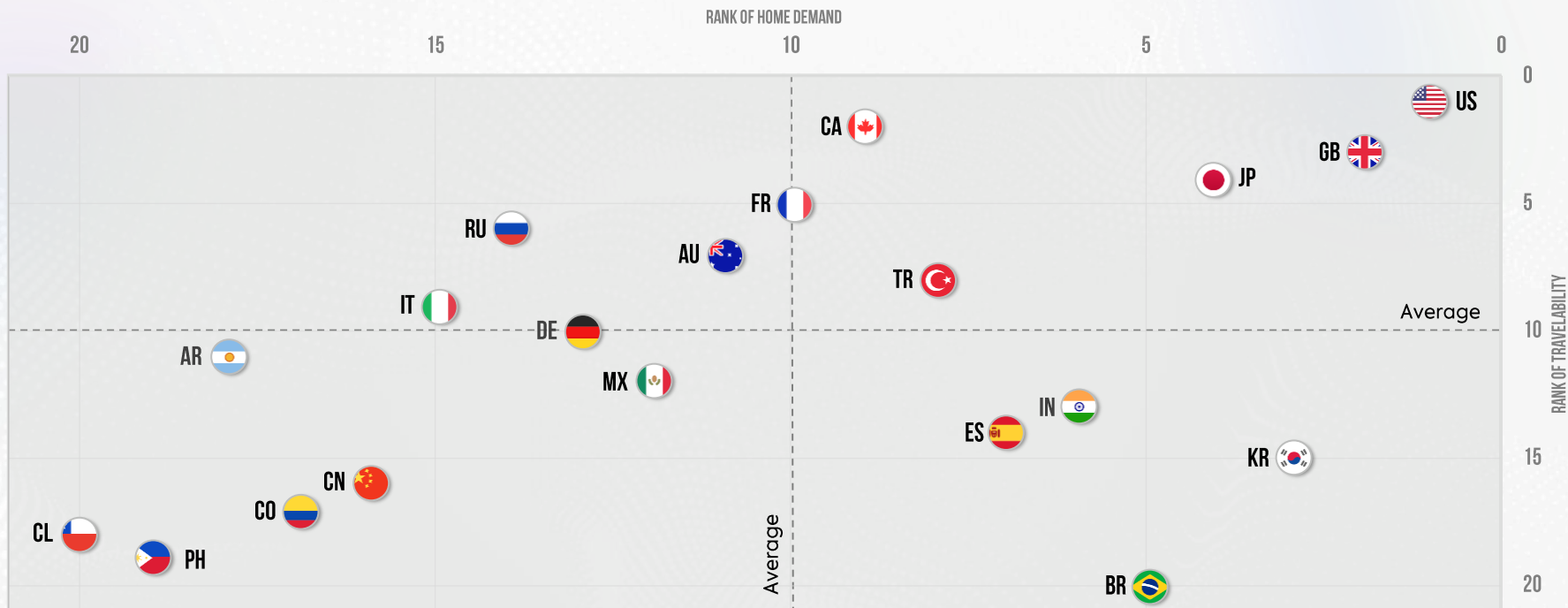


High end dramas are some of the most globally in-demand series coming out of Europe. The most in-demand show from Europe so far this year is *La Casa de Papel* with 47 times the demand of the average series.

Also notable are a trio of successful animated children's series coming out of Europe. *Masha and the Bear* (Russia), *Peppa Pig* (UK), and *Miraculous: Tales of Ladybug and Cat Noir* (France) all had similarly high demand and were among the top ten most globally in demand shows from Europe so far this year.

BRITISH CONTENT RANKS 3RD IN ITS ABILITY TO TRAVEL INTERNATIONALLY AND PERFORMS WELL IN ITS HOME MARKET

On the other hand, Spanish content performs well domestically but doesn't travel as well vs. other European markets.



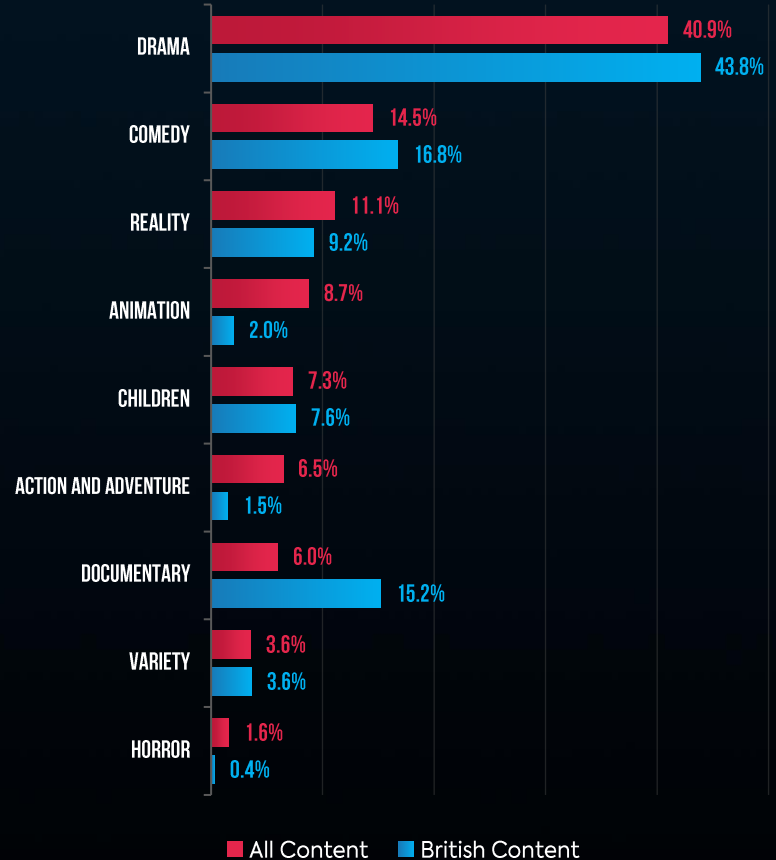


WHAT TYPE OF BRITISH CONTENT IS UNIQUELY SUCCESSFUL? DRAMA, COMEDY, AND ESPECIALLY DOCUMENTARY

- There is still demand for long-running established British drama including *Peaky Blinders*, *The Crown* & *Sherlock*
- Successful returning/new drama launches this year include *Line Of Duty*, *Vigil*, *The Serpent* & *It's A Sin*
- British comedies that continue to resonate include *Sex Education*, *Taskmaster*, *Derry Girls* & *Spitting Image*
- **Never Mind The Buzzcocks** has seen revived demand this year following its recent relaunch on Sky
- British documentary that performs well globally includes David Attenborough's *Planet Earth*, *Grand Designs* & sports related content such as Amazon's *All Or Nothing* & Netflix's *Formula 1: Drive To Survive*

Global Demand Share by Genre, Jan – Aug 2021

British vs. All content



CONCEPT TESTING: CRAFTING CONTENT FOR SUCCESS IN EUROPE

“ Our concept testing model highlights which elements of a show drive demand. That insight helps maximize the impact a show will have with audiences. ”



Alex Cameron
Partner Insights
Parrot Analytics



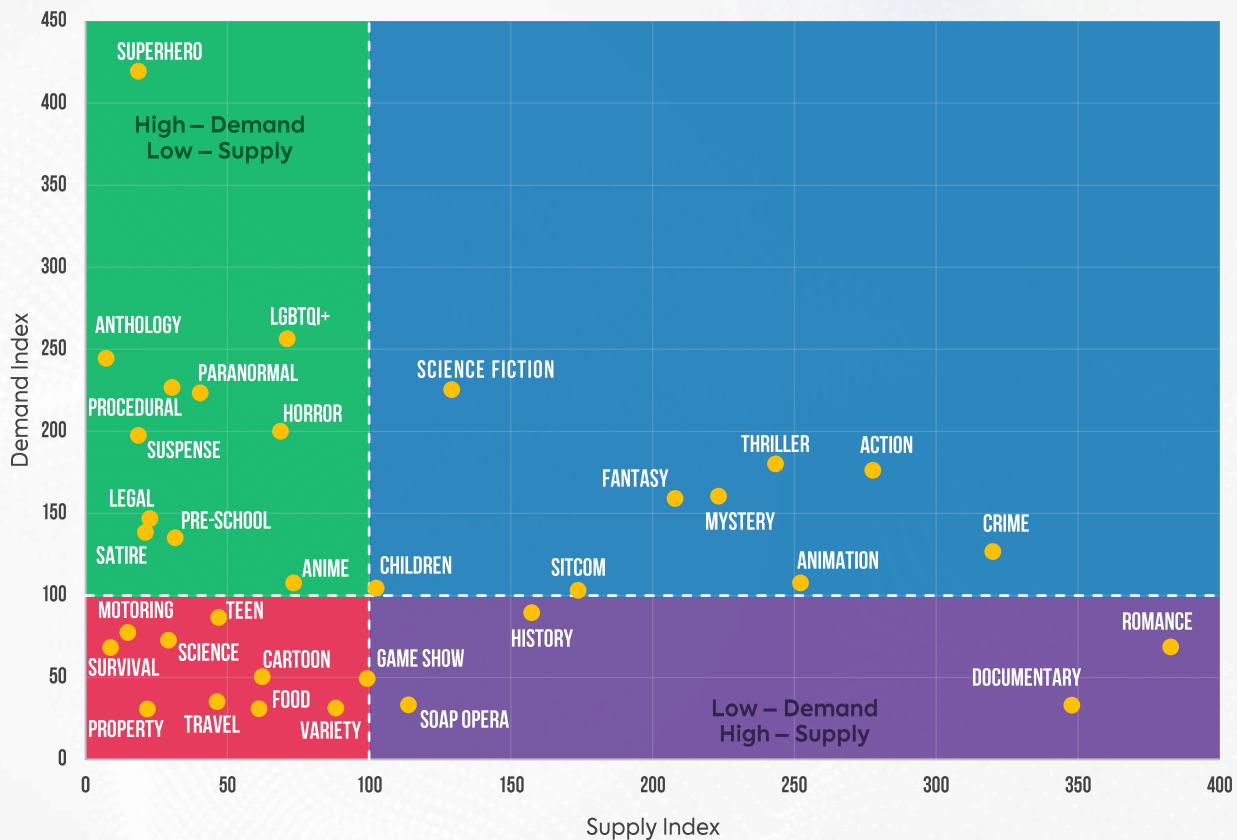
WHERE IS THERE WHITESPACE OPPORTUNITY IN EUROPE? JANUARY – AUGUST 2021

Superhero series, while often expensive to make, stand out as one of the most highly demanded, but undersupplied types of content. There is a notable cluster of related genres that have high opportunity in Europe – horror, paranormal, and suspense. Procedural and legal shows are also high demand/low supply in Europe.

The children's genre has nearly the average number of titles and average demand. Its demand is boosted by pre-school shows but pulled down by cartoons.

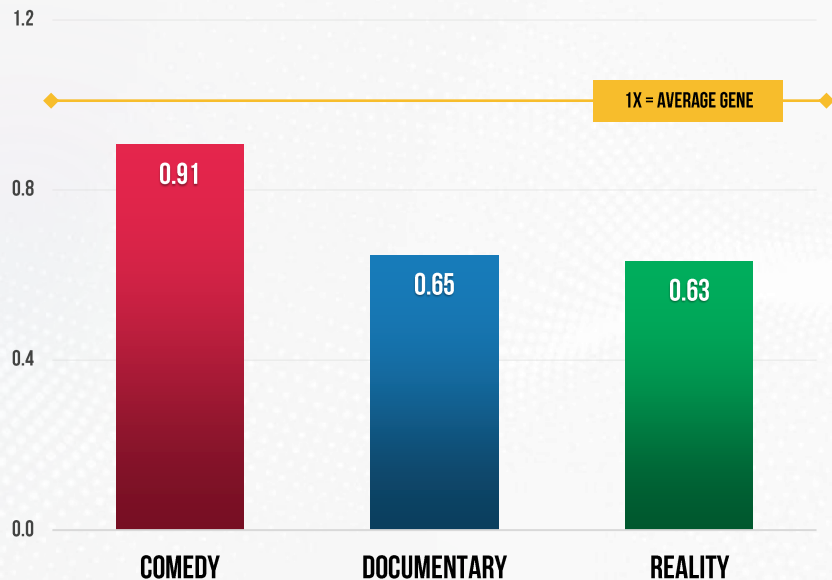
Science fiction, although it has more titles than the average genre, still has twice the demand so can support more titles.

Many reality subgenres – travel, property, food, etc. – underperform in Europe.



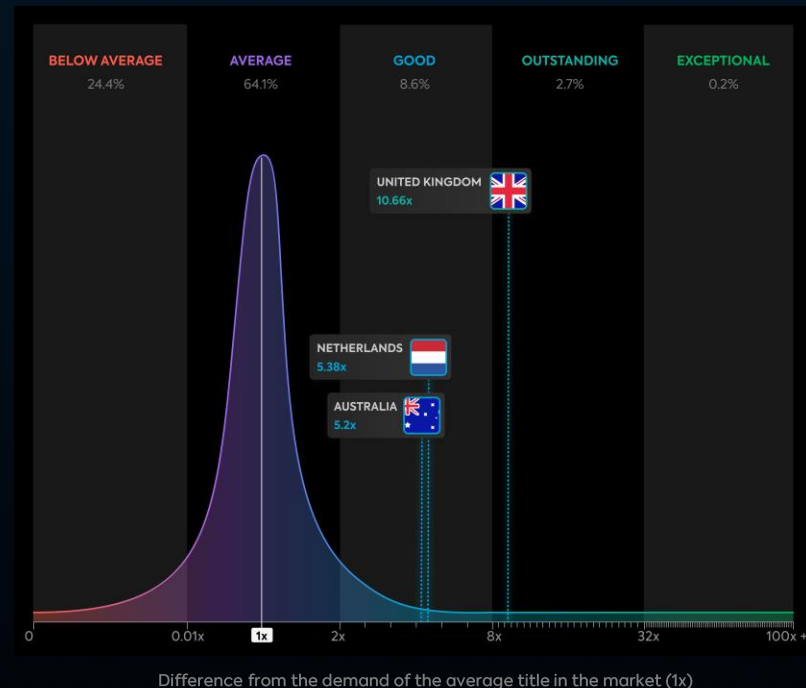
THE GENOME OF A SUCCESSFUL SERIES

UK demand for selected core genes in *Clarkson's Farm*



When analyzing the microgenre composition of this British series, we see that the average demand for each of the key microgenres individually is in fact below average. The success behind *Clarkson's Farm* lies in the interaction of these individual elements with each other and with other external factors like the cultural and social context of every market.

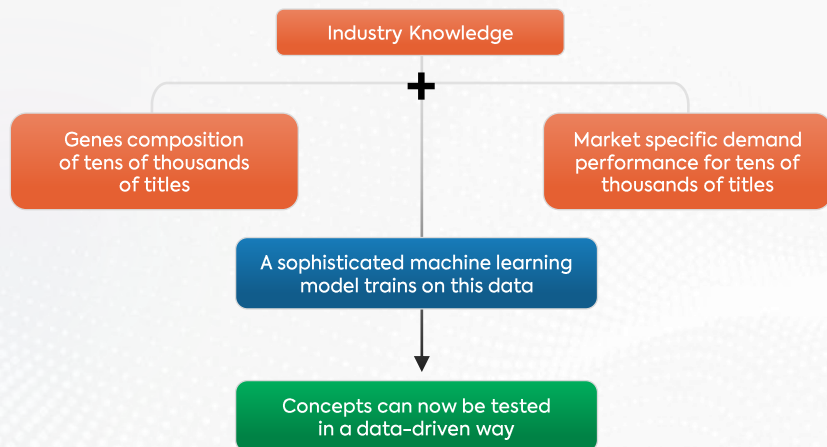
Clarkson's Farm 30 days post-release demand



Amazon Prime Video's *Clarkson's Farm* generated 10.7 times more demand than the average show in its home market, the UK. It not only reached a performance in its home market that only 2.7% of the shows have, but also had a good performance across other markets as geographically distant as the Netherlands and Australia.

FORECASTING TV SERIES SUCCESS

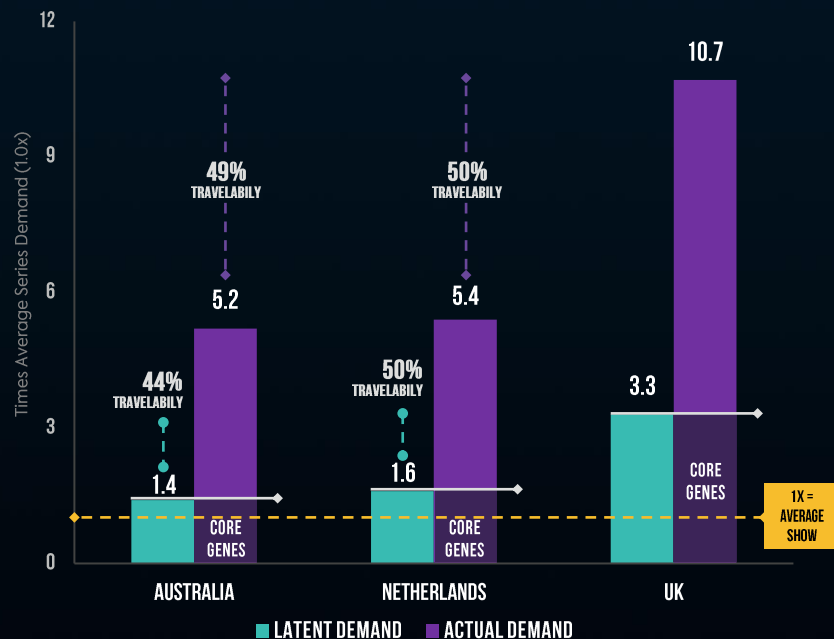
Clarkson's Farm Latent demand forecast



Parrot Analytics' Recipe for Success.

With infinite possible combinations of genes, how can we select the one with the highest probability of success? Parrot Analytics has developed an analytical framework that leverages our Content Genome of tens of thousands of shows in order to predict the demand for a concept across any market and any platform. This way, concepts can now be tested in a data-driven way.

Clarkson's Farm 30 days post-release demand



Isolating only four core genes, our concept testing model set the floor of its 30 days post-release at 3.3 times more demand than average in its home market and a score of around 50% of travelability to international markets like the Netherlands and Australia. These predictive results imply that the adding all other internal (production quality, casting, etc) and external factors (marketing, release strategies, etc) added additional performance boosts that elevated the show to a higher observed popularity across all territories.

TALENT DEMAND: FINDING THE RIGHT TALENT TO ENGAGE EUROPEAN AUDIENCES

“ As competition for eyeballs is ever increasing, it is vital that producers ensure their talent and casting decisions are optimized to unlock the right type of audience, creating personalized, tailored, and relevant content ”



Amit Devani
Insights Director, EMEA
Parrot Analytics



TALENT COMES IN MANY DIFFERENT FORMS...

The screenshot displays the Parrot Analytics Talent Demand dashboard. The main title is "Talent Demand". Below the title, there are navigation tabs: Discover, **Leaderboard**, Quick Compare, Time Series, Demand Distribution, and Worldview. The interface is set to "UNITED STATES" and "LATEST DAY". A "GENE FILTERS" dropdown is open, showing a list of professions with checkboxes. The "By Profession" filter is selected, and the search bar contains "Profession".

Filter Category	Profession	Selected
By Profession	Actor	<input type="checkbox"/>
	American Football Coach	<input type="checkbox"/>
	American Football Player	<input type="checkbox"/>
	Animator	<input type="checkbox"/>
By Gender	Art Department	<input type="checkbox"/>
	Assistant Director	<input type="checkbox"/>
	Athlete	<input type="checkbox"/>
	Baseball Player	<input type="checkbox"/>
By Age	Basketball Coach	<input type="checkbox"/>
	Basketball Player	<input type="checkbox"/>
	Business Person	<input type="checkbox"/>
	Camera Department	<input type="checkbox"/>
By Country of Origin	Casting Department	<input type="checkbox"/>
	Chef	<input type="checkbox"/>
	Combat Sports	<input type="checkbox"/>
	Comedian	<input type="checkbox"/>
By Country of Citizenship	Commentator	<input type="checkbox"/>
	Costume Designer	<input type="checkbox"/>
	Cricketer	<input type="checkbox"/>
	Director	<input type="checkbox"/>
ANALYZE	Dj	<input type="checkbox"/>
	Drag Queen	<input type="checkbox"/>
	Editor	<input type="checkbox"/>
	Editorial Department	<input type="checkbox"/>
	Education Department	<input type="checkbox"/>
	Fashion	<input type="checkbox"/>
	Football Manager	<input type="checkbox"/>
	Footballer	<input type="checkbox"/>
	Golfer	<input type="checkbox"/>
	Journalist	<input type="checkbox"/>
	Legal	<input type="checkbox"/>
	Make-up Artist	<input type="checkbox"/>
	Music Department	<input type="checkbox"/>
	Musical Group	<input type="checkbox"/>
	Musician	<input type="checkbox"/>
	Personality	<input type="checkbox"/>
	Politician	<input type="checkbox"/>
	Producer	<input type="checkbox"/>
	Rapper	<input type="checkbox"/>
	Rugby Player	<input type="checkbox"/>
	Scientist	<input type="checkbox"/>
	Script Department	<input type="checkbox"/>
	Singer/songwriter	<input type="checkbox"/>
	Social Media Influencer	<input type="checkbox"/>
	Sound Department	<input type="checkbox"/>
	Stunts	<input type="checkbox"/>
	Tennis Player	<input type="checkbox"/>
	Tv Presenter	<input type="checkbox"/>
	Video Department	<input type="checkbox"/>
	Voice Actor	<input type="checkbox"/>
	Writer	<input type="checkbox"/>
	Youtuber	<input type="checkbox"/>

WHAT TALENT HOLDS THE KEY?

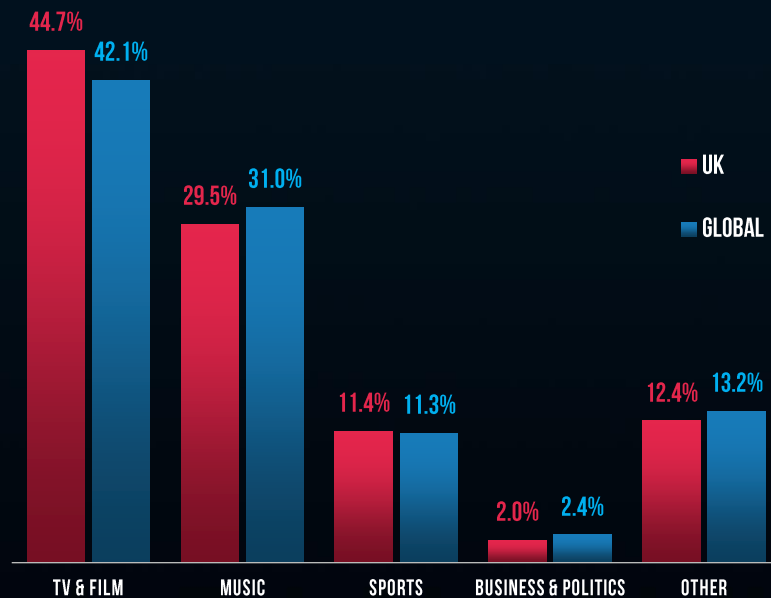
Understanding the top talent in the region is essential to be able to better engage audiences and connect with local targets.



HOW TO ACTIVATE THE AUDIENCE WITH TALENT

By understanding talent, it is possible to select the ideal casting, build marketing campaigns, actions with influencers, and develop biographical productions and documentaries of personalities.

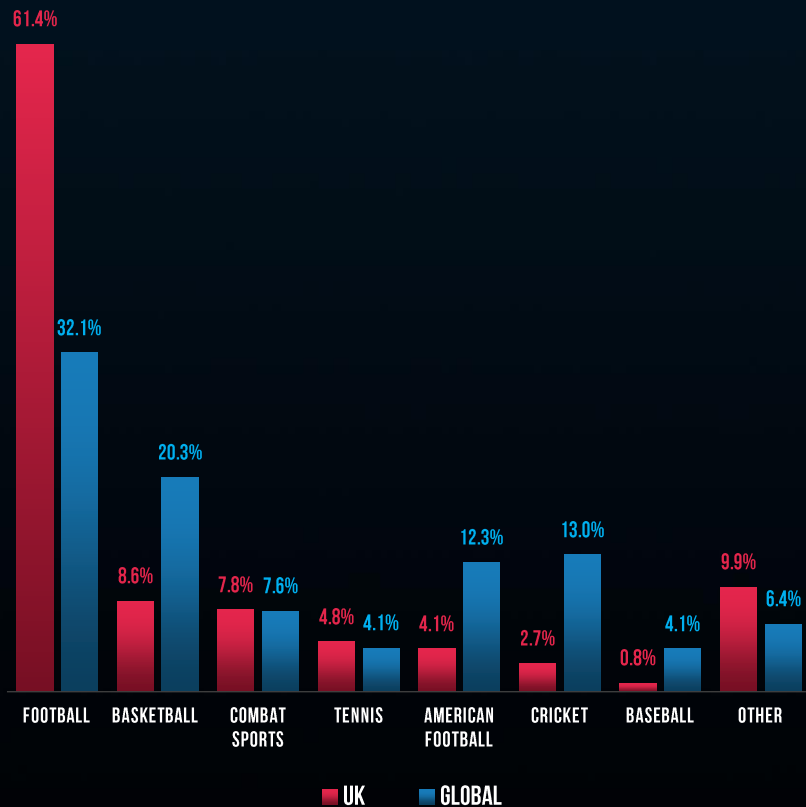
Share of Talent demand by category
Q3 2021



TARGETING TALENT DEMAND

At a macro level British audience demand for talent looks very similar to how global audiences express demand for talent. The most notable difference is that a slightly higher share of attention is given to TV & Film talent in the UK. To truly find the market specific tastes we need to dig deeper.

Share of *Sports* Talent demand by category Q3 2021



FOOTBALL IS KING IN THE UK

We can see the unique market specific behaviors of UK audiences when we look at what types of *sports* talent they are expressing demand for. At the top level, UK audiences give a nearly identical share of demand to sports talent as global audiences, but this breaks very differently in terms of the athletes they pay attention to.

Football talent in the UK accounts for a massive 61.4% share of demand for all sports talent. This is nearly twice the share of attention given to football talent globally.

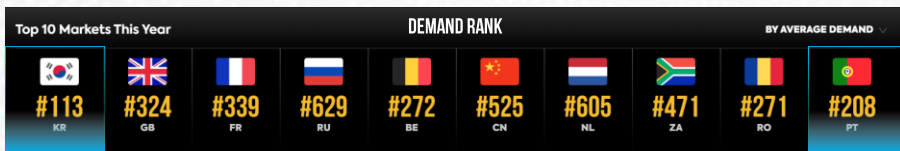
Meanwhile globally demand for sports popular in other markets stands out. Basketball, American Football, and Cricket have a higher share of global attention for sports talent driven by dedicated fans in countries like India and the US.

CONVERTING STAR POWER TO HIGH DEMAND CONTENT



The star power of talent can be an important factor driving demand for successful content. In fact, we've measured that athlete focused sports documentaries drive a greater share of demand for the genre than other types of sports docu-series.

Consider the successful documentary from Amazon Prime – **All or Nothing: Tottenham Hotspur**. Its focus on a British football team has led to high demand in that market, but specific talent has driven high demand in surprising places



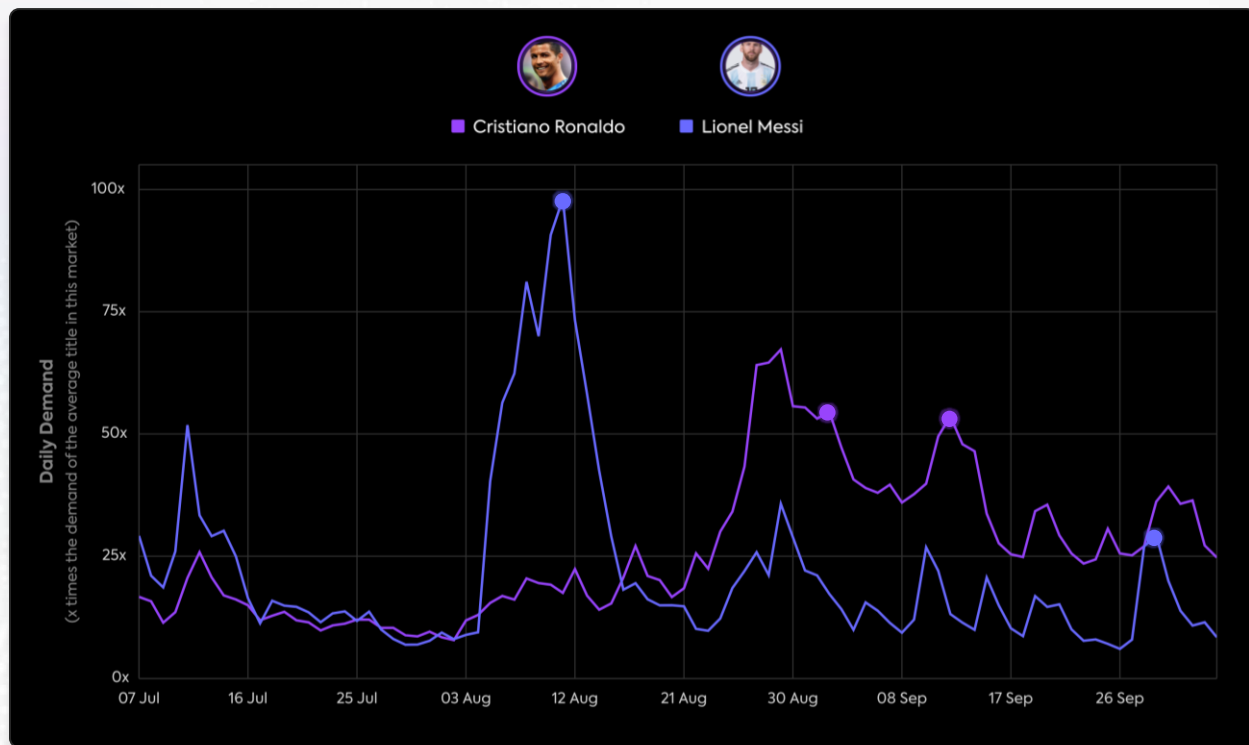
Of the top ten markets for this series, the two where it ranked the highest – South Korea and Portugal – have local ties to talent in the show. Son Heung-min, who plays forward for Tottenham, is captain of the South Korean national team. The new team manager featured in the show, José Mourinho, is Portuguese.

THE TOP 20 MOST IN-DEMAND SPORTS TALENT IN THE UK Q3 2021

TALENT	OCCUPATION
1 Lewis Hamilton	F1 DRIVER
2 Harry Kane	FOOTBALLER
3 Cristiano Ronaldo	FOOTBALLER
4 Marcus Rashford	FOOTBALLER
5 Lionel Messi	FOOTBALLER
6 Tom Daley	DIVER
7 Andrew Murray	TENNIS PLAYER
8 Bol Bol	BASKETBALL PLAYER
9 Simone Biles	GYMNAST
10 Declan Rice	FOOTBALLER
11 Jadon Sancho	FOOTBALLER
12 Gareth Southgate	FOOTBALLER
13 Max Verstappen	F1 DRIVER
14 Oscar	FOOTBALLER
15 Raheem Sterling	FOOTBALLER
16 Dustin Poirier	COMBAT SPORTS
17 Wayne Rooney	FOOTBALLER
18 Jordan Henderson	FOOTBALLER
19 Gary Neville	FOOTBALL PUNDIT
20 Luke Shaw	FOOTBALLER

EVENTS DRIVING DEMAND FOR TALENT

UK Talent Demand for Cristiano Ronaldo vs. Lionel Messi, July – September 2021



11TH AUG, 2021

Messi switches to Paris Saint-Germain

31ST AUG, 2021

Cristiano Ronaldo re-signs for Manchester United from Juventus

11 SEPT, 2021

Cristiano Ronaldo scores twice at Old Trafford on his second debut for Manchester United

29TH SEPT, 2021

PSG 2-0 Manchester City: Lionel Messi goal seals Champions League group-stage win



MARKET-SPECIFIC TV CONTENT TRENDS

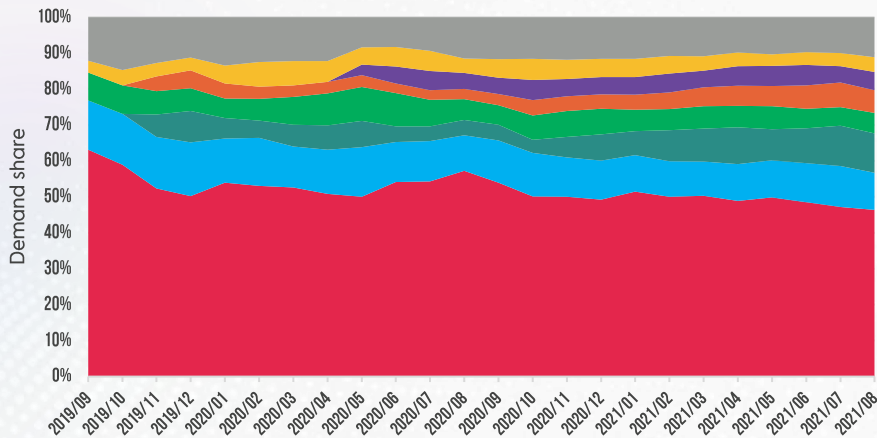
SVOD platform market demand share, genre trends, whitespace opportunities, and top shows

This section presents our latest global TV demand data trends. For each of the six territories examined, we reveal each market's SVOD demand share by original platform for digital originals

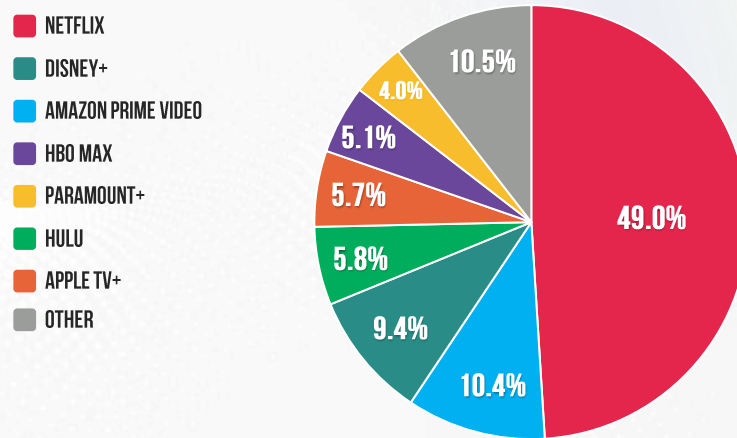
We also present our finding on the genre preferences of each market, the whitespace opportunities, and the top 20 overall most in-demand series across all platforms.

WHICH PLATFORM'S ORIGINALS ARE MOST IN-DEMAND IN GERMANY?

Demand shares of digital original series by originating platform over 24 months



Demand share of digital original series by originating platform, Jan – Aug 2021

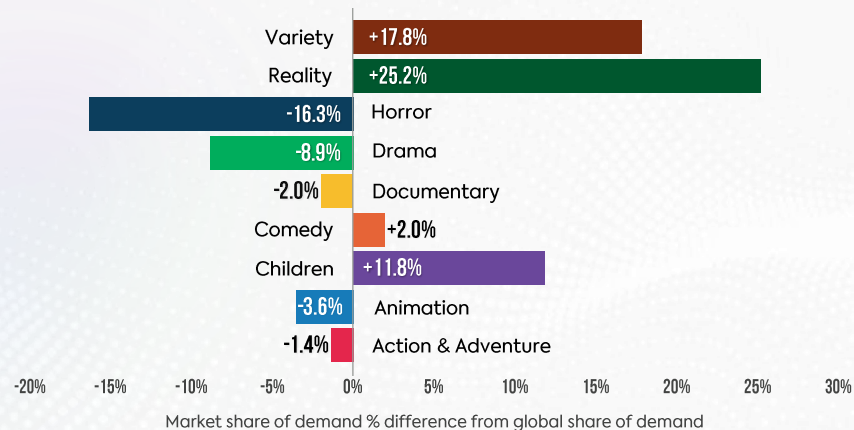


- In Germany, 49.0% of all demand for digital originals expressed between January and August 2021 is for a Netflix original series. This is among the highest shares for the platform in Europe.
- However, Netflix's share of demand in Germany has been on a steady downward trend since May 2021.

- Original content from Apple TV+ accounts for 5.7% of demand in Germany. The platform has grown its demand share nearly every month so far this year.
- The demand share in Germany for Hulu originals is 5.8% so far this year. This is among the smallest demand shares for the platform in this report. Since June, Apple TV+ has had a larger demand share than Hulu in this market.

HOW DO GERMAN GENRE PREFERENCES COMPARE TO THE GLOBAL AVERAGE?

Genre share of demand difference from global average



- To highlight key market specific taste differences, we compare the market share of demand by genre to the global average share.
- Germany is one of the markets where reality is noticeably successful. The share of demand for this genre is 25.2% above the global average.
- While most markets in this report did not have a share of demand for children’s content significantly different from the global share, Germany’s share of demand for this genre was 11.8% larger than the global average.

WHERE ARE THERE WHITESPACE OPPORTUNITIES TO SATISFY DEMAND IN GERMANY?

Demand vs Supply indexes for series by microgenre



- This analysis compares the supply of titles with the average demand for a microgenre to reveal opportunities where high demand has yet to be filled.
- As with all the markets we looked at, superhero series and shows with an anthology format are areas of content with well above average demand but low supply.
- Performance content has a uniquely high demand in Germany and is an area of opportunity.

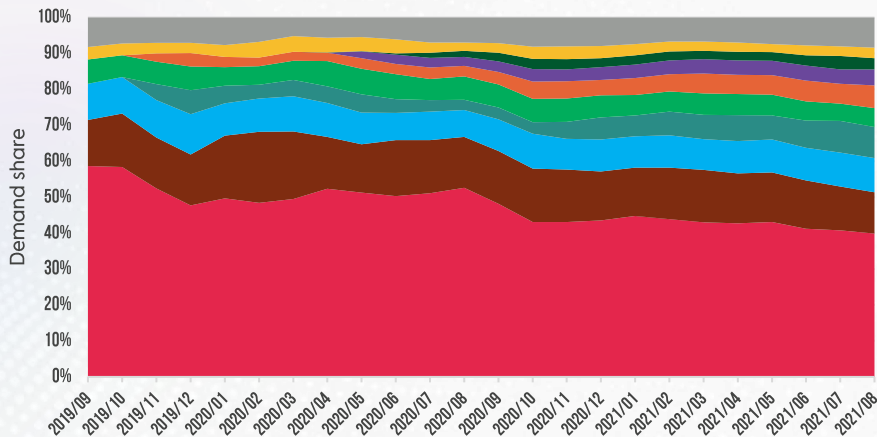
THE TOP 20 MOST IN-DEMAND NEW AND RETURNING SERIES IN GERMANY

Series Name	Original Platform	Genre	Difference from Market Average (X times)	
1 Attack On Titan	MBS	Animation	21.0	
2 The Mandalorian	Disney+	Action and Adventure	20.3	
3 WandaVision	Disney+	Action and Adventure	20.2	
4 The Walking Dead	AMC	Drama	19.0	
5 Spongebob Squarepants	Nickelodeon	Children	18.8	
6 Grey's Anatomy	ABC	Drama	17.3	
7 PAW Patrol	TVOKids	Children	16.8	
8 Die Sendung Mit Der Maus	WDR	Animation	16.7	
9 WWE Monday Night Raw	USA Network	Sports	16.2	
10 The Voice Of Germany	ProSieben	Reality	14.1	
11 Lucifer	Netflix	Drama	13.7	
12 Sesame Street	PBS	Children	13.6	
13 Jujutsu Kaisen	JNN	Animation	13.4	
14 Peppa Pig	Channel 5	Children	13.2	
15 Miraculous: Tales Of Ladybug And Cat Noir	TF1	Children	13.1	
16 Shameless	Showtime	Comedy	12.9	
17 The Expanse	Amazon Prime Video	Drama	12.8	
18 The Falcon And The Winter Soldier	Disney+	Action and Adventure	12.8	
19 Supernatural	The CW	Drama	12.6	
20 Rick And Morty	Adult Swim	Animation	12.5	

*New and returning series are series which released new episodes in the past year (Sep 1 2020 – Aug 31 2021).

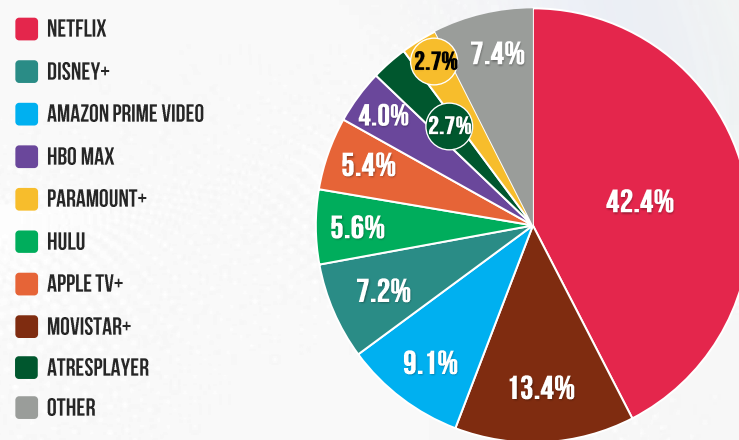
WHICH PLATFORM'S ORIGINALS ARE MOST IN-DEMAND IN SPAIN?

Demand shares of digital original series by originating platform over 24 months



- The streaming landscape in Spain is unique because of the presence of two local platforms which have carved out a substantial share of demand for their original series – Movistar+ and ATRESPlayer.
- The success of Movistar+ in particular is notable because it has the second largest share of original demand (13.4%) behind Netflix.

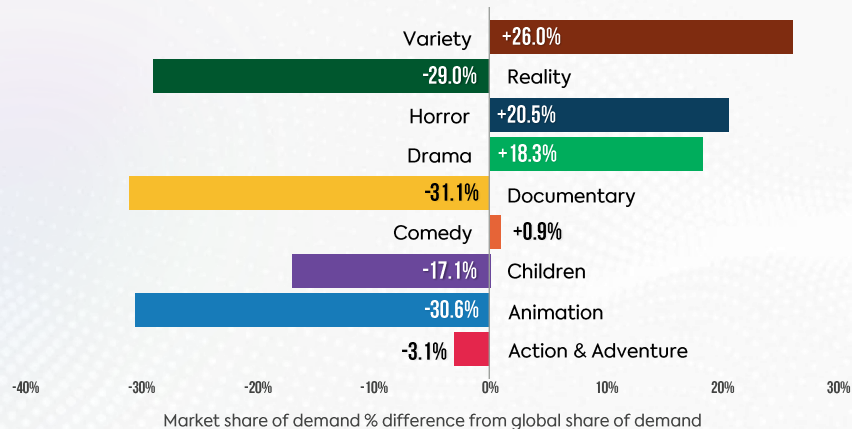
Demand share of digital original series by originating platform, Jan – Aug 2021



- Apple TV+ has a 5.4% share of demand for its originals in Spain. This is greater than the platform's global share of demand (5.2%) which shows its originals hold up well when faced with competition from local content.
- Amazon Prime Video's share of demand for its original content in Spain (9.1%) is the lowest of markets in this report and well below its global share of demand (12.3%).

HOW DO SPANISH GENRE PREFERENCES COMPARE TO THE GLOBAL AVERAGE?

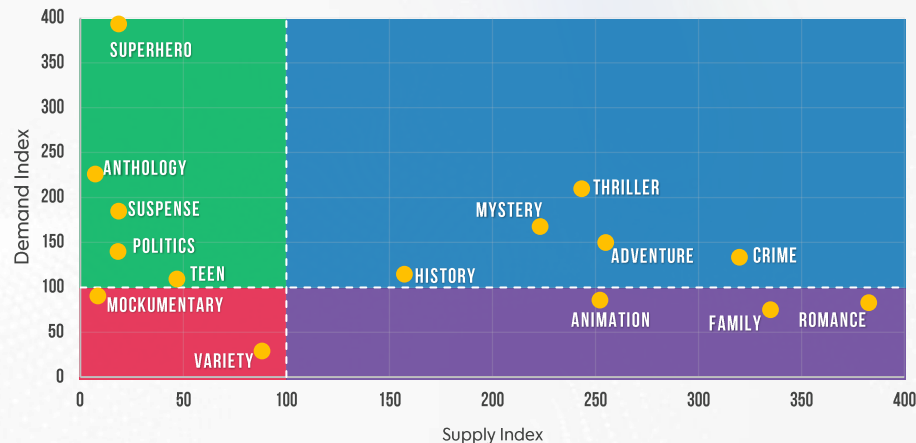
Genre share of demand difference from global average



- Spain is the most horror-loving market in this report. Spanish audiences had a share of demand for this genre 20.5% greater than the global average.
- Spaniards are also drama fans with an 18.3% larger share of demand for the genre than the global average. High demand for drama in this market is boosted by a strong offering of locally produced dramas.

WHERE ARE THERE WHITESPACE OPPORTUNITIES TO SATISFY DEMAND IN SPAIN?

Demand vs Supply indexes for series by microgenre



- The politics and teen microgenres are particular areas of opportunity in Spain. Both have higher demand here than in other markets in this report and well below the average number of titles.
- Mockumentary content, which overperforms in other markets has not found fans to the same extent in Spain where its demand is 10% below the average microgenre.

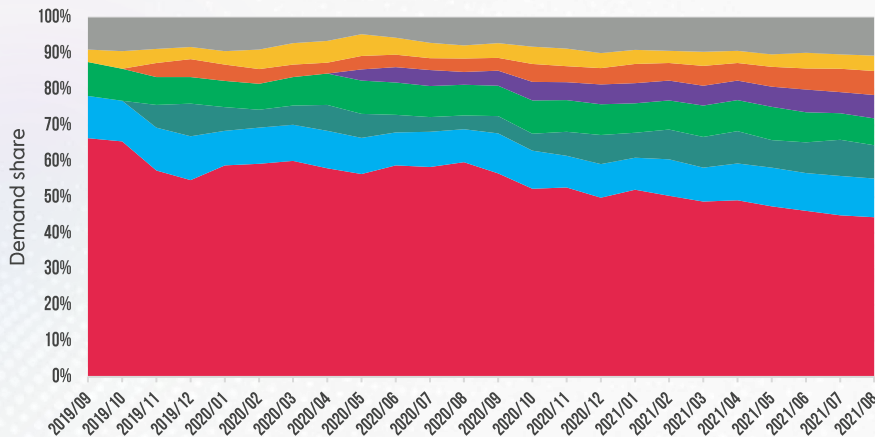
THE TOP 20 MOST IN-DEMAND NEW AND RETURNING SERIES IN SPAIN

Series Name	Original Platform	Genre	Difference from Market Average (X times)
1 Attack On Titan	MBS	Animation	23.5
2 The Mandalorian	Disney+	Action and Adventure	20.7
3 The Walking Dead	AMC	Drama	19.4
4 WandaVision	Disney+	Action and Adventure	18.2
5 El Cid	Amazon Prime Video	Drama	15.9
6 El Hormiguero	Cuatro	Variety	14.7
7 Grey's Anatomy	ABC	Drama	14.4
8 Veneno. Vida y muerte de un icono	ATRESPlayer	Drama	14.2
9 The Handmaid's Tale	Hulu	Drama	14.2
10 Rick And Morty	Adult Swim	Animation	14.0
11 La Que Se Avecina	Telecinco	Comedy	14.0
12 30 Monedas	HBO España	Horror	14.0
13 Pátria	HBO España	Drama	13.9
14 Spongebob Squarepants	Nickelodeon	Children	13.7
15 Cobra Kai	Netflix	Comedy	13.7
16 The Simpsons	FOX	Animation	13.5
17 My Hero Academia	YTV	Animation	13.5
18 Vikings	HISTORY	Action and Adventure	13.4
19 Hierro	Movistar+	Drama	13.0
20 Cuéntame Cómo Pasó	La 1	Drama	12.7

*New and returning series are series which released new episodes in the past year (Sep 1 2020 – Aug 31 2021).

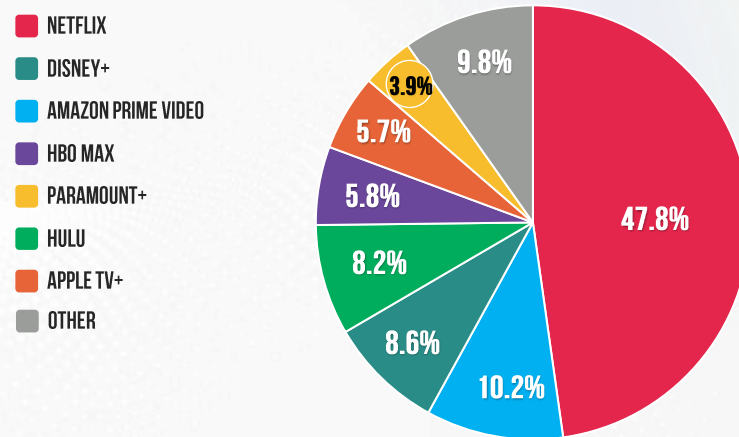
WHICH PLATFORM'S ORIGINALS ARE MOST IN-DEMAND IN FRANCE?

Demand shares of digital original series by originating platform over 24 months



- Hulu originals account for 8.2% of digital original demand in France so far this year. This is the largest share of demand for Hulu originals of markets in this report.
- Netflix's share of demand for originals in France has fallen sharply from two years ago when it accounted for nearly 70% of demand in France. So far this year, its originals make up 47.8% of demand here.

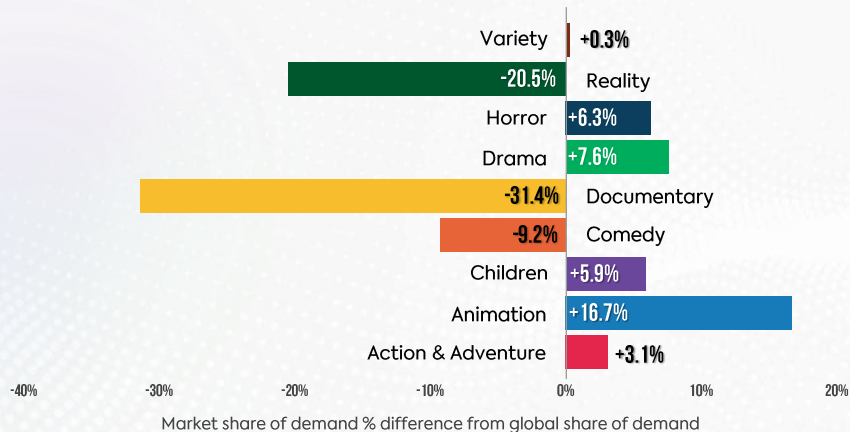
Demand share of digital original series by originating platform, Jan – Aug 2021



- HBO Max's 5.8% share of demand for digital originals in France is among the highest in this report.
- While Disney+ has had several stellar global premieres this year, it has struggled to grow and maintain its demand share in France. Its demand share this August (9.2%) was effectively the same as its earlier peak in December 2019 (9.1%).

HOW DO FRENCH GENRE PREFERENCES COMPARE TO THE GLOBAL AVERAGE?

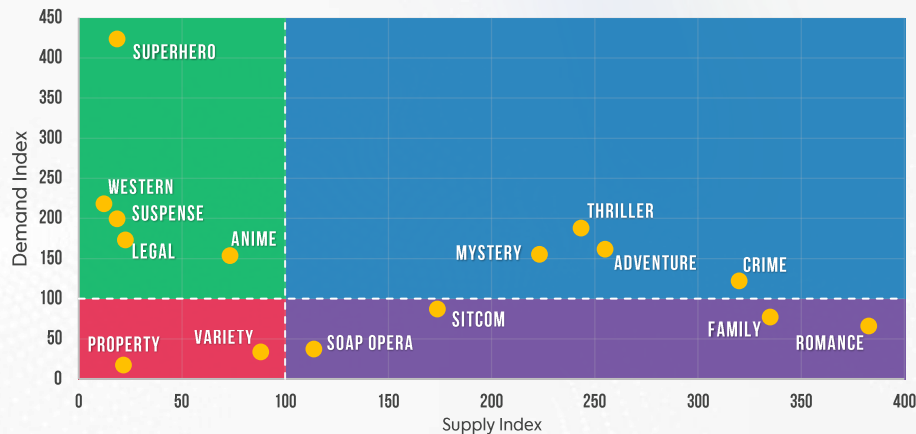
Genre share of demand difference from global average



- France is the only market in this report that has a greater than global share of demand for animated content. The share of demand that French audiences give to animation is 16.7% greater than global audiences.
- France is one of only two markets in this report (along with Sweden) with a below average share of demand for the comedy genre. With a share of demand for comedy 9.2% below the global average, France is the least comedy-loving market in this report.

WHERE ARE THERE WHITESPACE OPPORTUNITIES TO SATISFY DEMAND IN FRANCE?

Demand vs Supply indexes for series by microgenre



- Of markets in this report, France stands apart from others as a market with the highest demand for anime. Anime content had demand in France 54% greater than the average micro genre while in most other markets it had below average demand.
- Similarly, legal content had notably high demand in France. This combined with the below average number of titles in this category make it an area with whitespace potential in France.

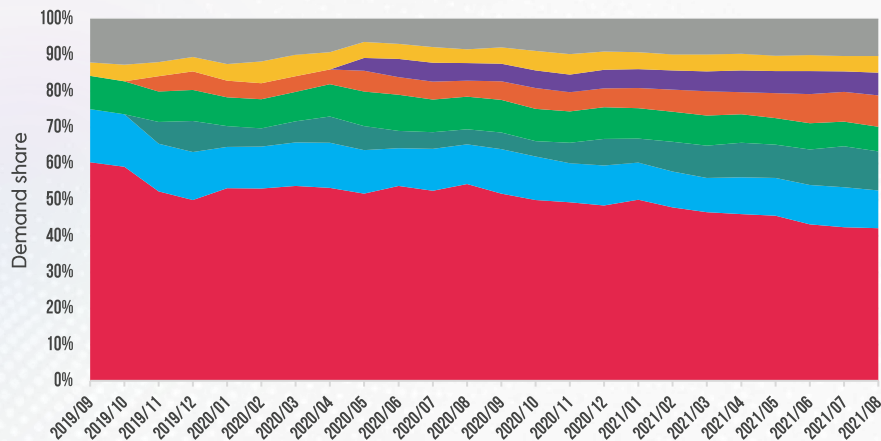
THE TOP 20 MOST IN-DEMAND NEW AND RETURNING SERIES IN FRANCE

Series Name	Original Platform	Genre	Difference from Market Average (X times)	
1 Attack On Titan	MBS	Animation	38.3	
2 The Walking Dead	AMC	Drama	23.9	
3 PAW Patrol	TVOKids	Children	22.5	
4 My Hero Academia	YTV	Animation	21.3	
5 Touche Pas À Mon Poste!	C8	Variety	21.2	
6 WandaVision	Disney+	Action and Adventure	19.9	
7 Miraculous: Tales Of Ladybug And Cat Noir	TF1	Children	19.7	
8 The Mandalorian	Disney+	Action and Adventure	19.6	
9 Grey's Anatomy	ABC	Drama	16.2	
10 The Crown	Netflix	Drama	15.8	
11 Vikings	HISTORY	Action and Adventure	15.3	
12 The Handmaid's Tale	Hulu	Drama	14.5	
13 One Piece	Fuji Television Network	Animation	14.5	
14 Rick And Morty	Adult Swim	Animation	13.9	
15 Les Marseillais	W9	Reality	13.5	
16 WWE Monday Night Raw	USA Network	Sports	13.4	
17 Jujutsu Kaisen	JNN	Animation	13.2	
18 South Park	Comedy Central	Animation	13.1	
19 The Voice – La Plus Belle Voix (FR)	TF1	Reality	12.9	
20 Lucifer	Netflix	Drama	12.8	

*New and returning series are series which released new episodes in the past year (Sep 1 2020 – Aug 31 2021).

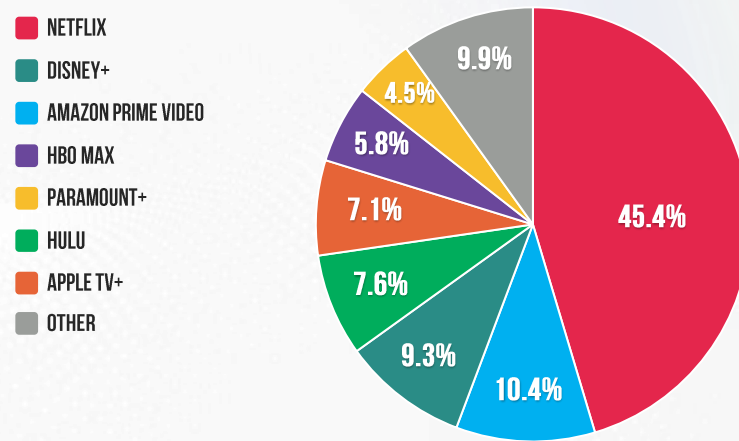
WHICH PLATFORM'S ORIGINALS ARE MOST IN-DEMAND IN THE UNITED KINGDOM?

Demand shares of digital original series by originating platform over 24 months



- Audiences in the UK gave a high share of demand to original content from Apple TV+. The platform's 7.1% of demand for originals here is well above its global share of demand – 5.2%.
- Netflix's share of demand for originals in the UK has been on the decline throughout the year. In January, its originals made up exactly 50% of demand for originals but this has fallen each month since then.

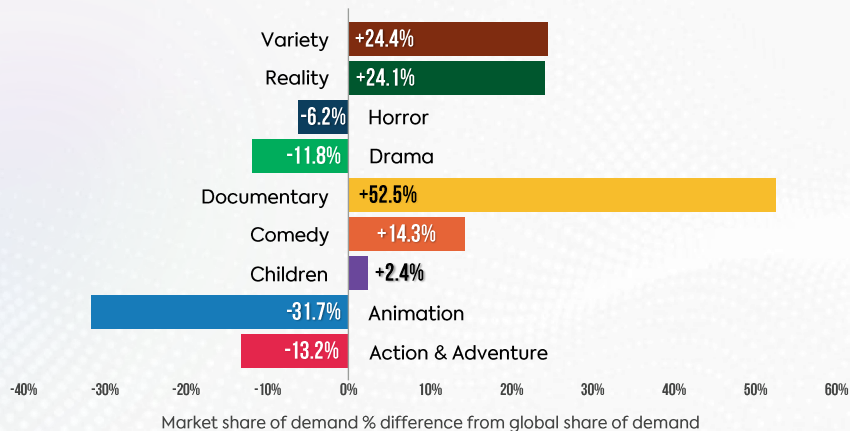
Demand share of digital original series by originating platform, Jan – Aug 2021



- The UK share of demand for HBO Max original content (5.8%) is above the global share of demand for the platform's content (4.7%).
- While Hulu's 7.6% share of demand for originals in the UK is above the global average (5.5%), the 24-month trend chart shows how it has been squeezed in recent months. In August 2021 Hulu originals accounted for 6.8% of original demand in the UK.

HOW DO BRITISH GENRE PREFERENCES COMPARE TO THE GLOBAL AVERAGE?

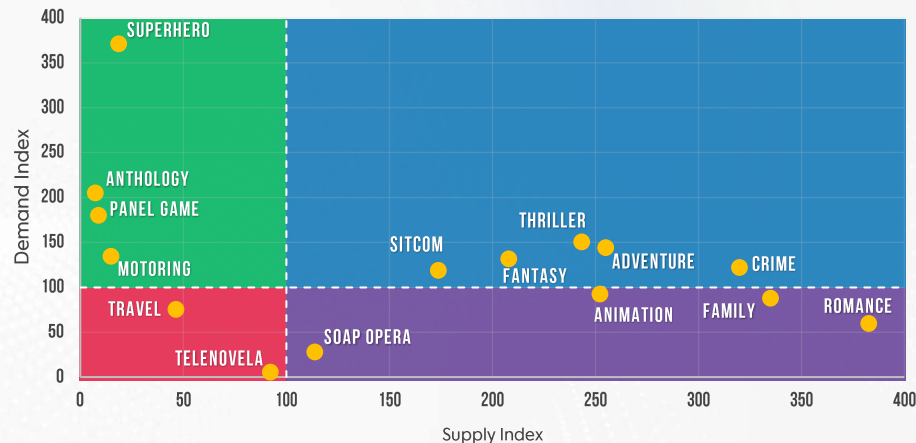
Genre share of demand difference from global average



- Documentary content is a uniquely successful genre in the UK. The UK is the only market in this report where the share of demand for documentary content is greater than the global share – 52.5% greater to be exact.
- Comedy also succeeds with British audiences. While not as overwhelmingly above the global average as the documentary genre, the British share of demand for comedy is 14.3% larger than the global average, and the largest of markets in this report.

WHERE ARE THERE WHITESPACE OPPORTUNITIES TO SATISFY DEMAND IN THE UK?

Demand vs Supply indexes for series by microgenre



- Motoring content has had uniquely high demand in the UK this year compared to other markets in this report where it generally has below average demand.
- Travel content, while it has a below average number of titles and demand, has much higher demand in the UK than other markets so could be a targeted area of opportunity in this market.

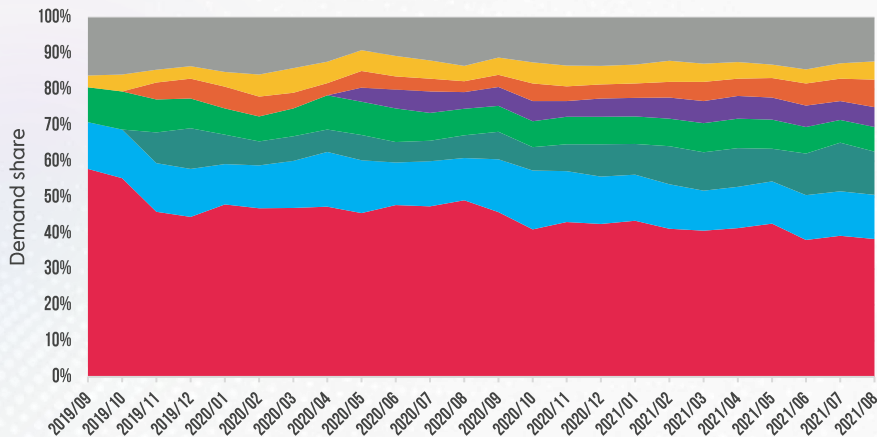
THE TOP 20 MOST IN-DEMAND NEW AND RETURNING SERIES IN THE UNITED KINGDOM

Series Name	Original Platform	Genre	Difference from Market Average (X times)
1 The Mandalorian	Disney+	Action and Adventure	27.2
2 WandaVision	Disney+	Action and Adventure	26.2
3 The Walking Dead	AMC	Drama	25.6
4 WWE Monday Night Raw	USA Network	Sports	24.4
5 Attack On Titan	MBS	Animation	24.1
6 My Hero Academia	YTV	Animation	23.7
7 Grey's Anatomy	ABC	Drama	23.5
8 The Crown	Netflix	Drama	21.7
9 Spongebob Squarepants	Nickelodeon	Children	21.4
10 Line Of Duty	BBC Two	Drama	21.0
11 Peppa Pig	Channel 5	Children	19.2
12 The Handmaid's Tale	Hulu	Drama	18.6
13 Rick And Morty	Adult Swim	Animation	18.6
14 Cobra Kai	Netflix	Comedy	18.3
15 Brooklyn Nine-Nine	FOX	Comedy	18.2
16 Top Gear	BBC Two	Sports	18.1
17 PAW Patrol	TVOKids	Children	18.1
18 Miraculous: Tales Of Ladybug And Cat Noir	TF1	Children	17.7
19 The Flash	The CW	Action and Adventure	17.6
20 Supernatural	The CW	Drama	17.6

*New and returning series are series which released new episodes in the past year (Sep 1 2020 – Aug 31 2021).

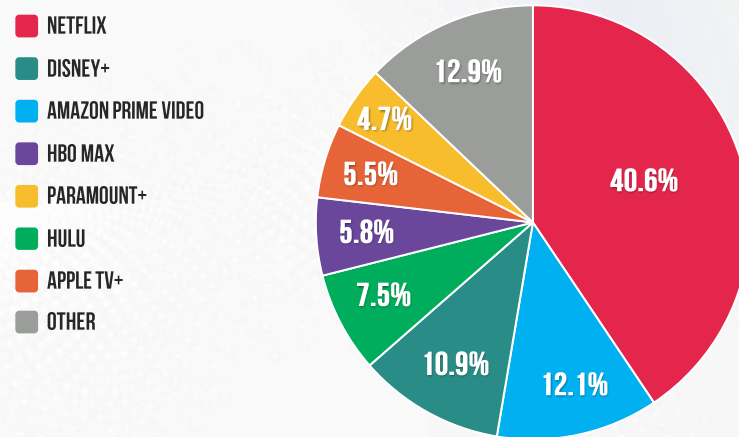
WHICH PLATFORM'S ORIGINALS ARE MOST IN-DEMAND IN SWEDEN?

Demand shares of digital original series by originating platform over 24 months



- The share of demand for originals from Amazon Prime Video is 12.1% so far this year. This is the largest share among markets covered in this report and on par with the platform's global share of demand to date (12.3%).
- Netflix originals account for the lowest share of demand in Sweden out of markets in this report. Netflix's 40.6% share of demand here is well below its global share (47.4%).

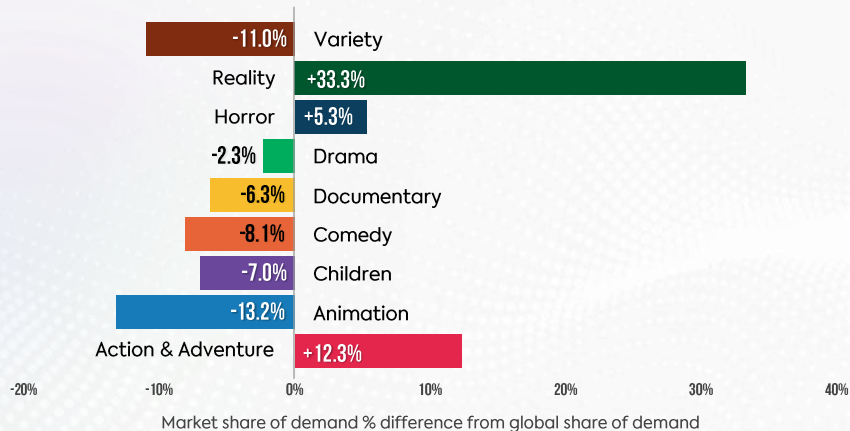
Demand share of digital original series by originating platform, Jan – Aug 2021



- In Sweden, Netflix's share of demand has not declined steadily but in jumps. This year it dropped sharply from 43.6% in May to 38.1% in June.
- Paramount+ original content has found fans in Sweden. Its 4.7% share of original demand this year is the largest of markets in this report.

HOW DO SWEDISH GENRE PREFERENCES COMPARE TO THE GLOBAL AVERAGE?

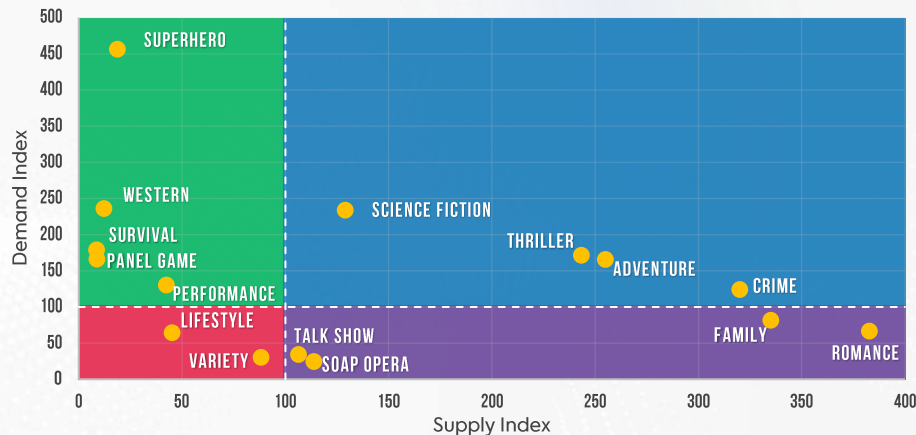
Genre share of demand difference from global average



- Reality is a genre that resonates with Swedish audiences. Audiences here gave a 33.3% greater share of demand to the genre than the global average. This is the largest demand share for the reality genre in this report.
- Sweden was one of three markets in this report where demand for the action/adventure genre was larger than the global average. Swedish audiences expressed 12.3% more demand for this content than global audiences.

WHERE ARE THERE WHITESPACE OPPORTUNITIES TO SATISFY DEMAND IN SWEDEN?

Demand vs Supply indexes for series by microgenre



- Consistent with high demand for reality content in Sweden, a number of specific types of reality content succeed here. Performance and survival content in particular have caught the attention of Swedish audiences.
- Science fiction content had the highest demand in Sweden of all markets in this report. It also has a greater than average number of titles, but because demand has outpaced supply there is still demand to support more sci-fi titles in Sweden.

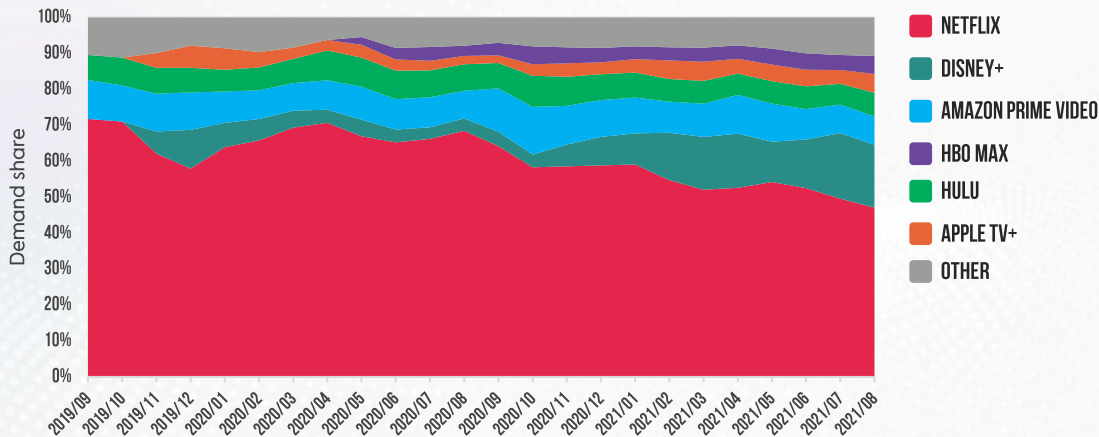
THE TOP 20 MOST IN-DEMAND NEW AND RETURNING SERIES IN SWEDEN

Series Name	Original Platform	Genre	Difference from Market Average (X times)
1 The Mandalorian	Disney+	Action and Adventure	15.0
2 WandaVision	Disney+	Action and Adventure	15.0
3 The Walking Dead	AMC	Drama	14.3
4 Grey's Anatomy	ABC	Drama	14.0
5 Attack On Titan	MBS	Animation	13.7
6 Expedition Robinson (Sweden)	SVT2	Reality	12.9
7 The Handmaid's Tale	Hulu	Drama	12.9
8 Rick And Morty	Adult Swim	Animation	11.8
9 South Park	Comedy Central	Animation	11.6
10 The Expanse	Amazon Prime Video	Drama	11.1
11 My Hero Academia	YTV	Animation	10.4
12 The Boys	Amazon Prime Video	Action and Adventure	10.3
13 Peppa Pig	Channel 5	Children	10.1
14 Taskmaster	Dave	Variety	10.0
15 Family Guy	Fox Network	Animation	9.9
16 The Simpsons	FOX	Animation	9.7
17 Saturday Night Live	NBC	Comedy	9.7
18 The Flash	The CW	Action and Adventure	9.5
19 PAW Patrol	TVOKids	Children	9.0
20 The Falcon And The Winter Soldier	Disney+	Action and Adventure	9.0

*New and returning series are series which released new episodes in the past year (Sep 1 2020 – Aug 31 2021).

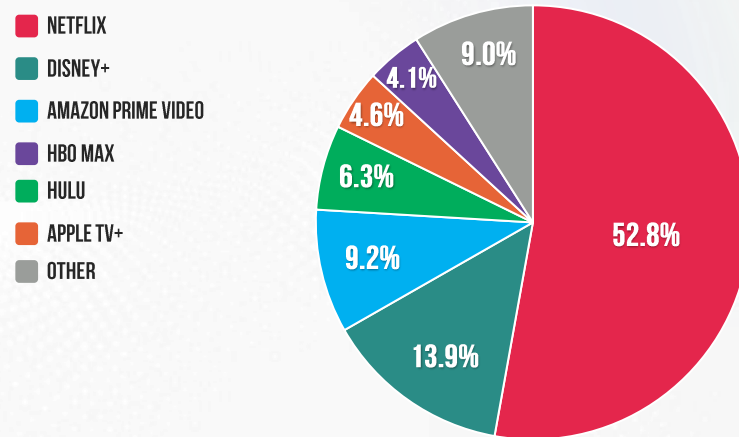
WHICH PLATFORM'S ORIGINALS ARE MOST IN-DEMAND IN TURKEY?

Demand shares of digital original series by originating platform over 24 months



- In this report, Netflix achieved the largest share of demand for its originals in Turkey. Its 52.8% share here makes Turkey the only market in this report where Netflix has a greater than 50% share of demand.
- Despite its majority share, Netflix's demand share has fallen notably over the course of the year.

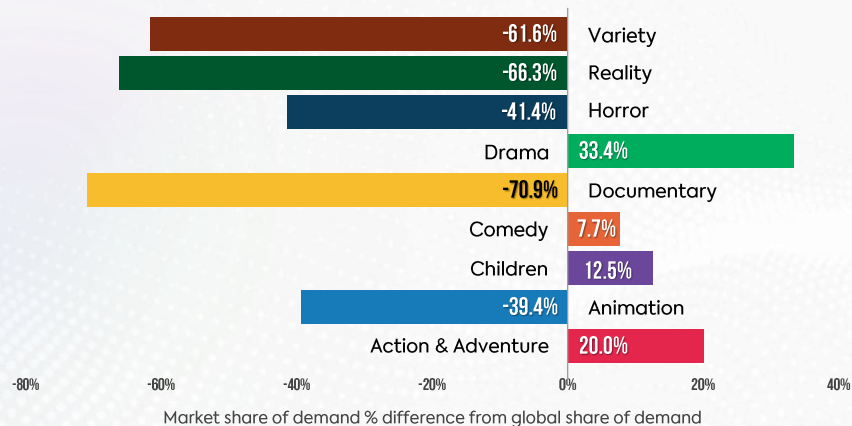
Demand share of digital original series by originating platform, Jan – Aug 2021



- The main driver of Netflix's demand share losses in Turkey has been the strong demand growth for originals from Disney+ this year.
- Disney+'s 13.9% share of demand in Turkey is the largest in this report and nearly twice the global share of demand for originals from the platform (7.0%). Turkey is also the only market in this report where the share of demand for Disney+ originals is larger than Amazon Prime Video.

HOW DO TURKISH GENRE PREFERENCES COMPARE TO THE GLOBAL AVERAGE?

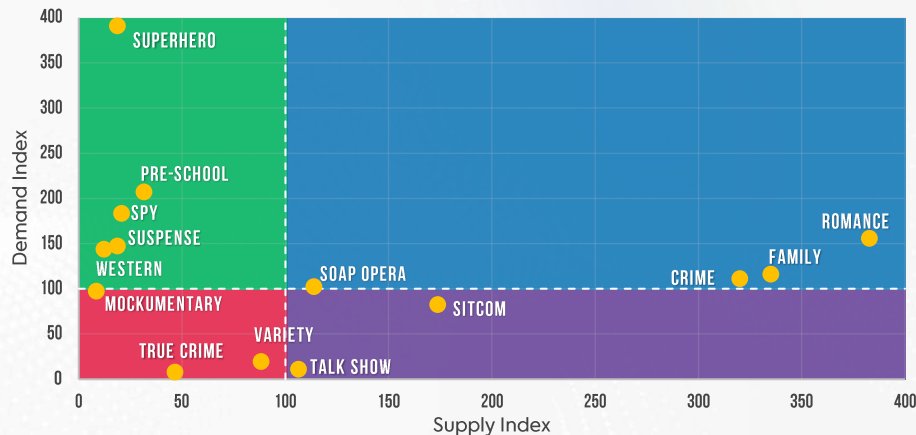
Genre share of demand difference from global average



- Turkey is the most drama-loving market in this report, with a share of demand for this genre 33.4% greater than the global average.
- The share of demand Turkish audiences give to the action/adventure genre is also the largest in this report. The strength of this genre in Turkey is boosted by the massive popularity of Disney+ original action/adventure series this year.

WHERE ARE THERE WHITESPACE OPPORTUNITIES TO SATISFY DEMAND IN TURKEY?

Demand vs Supply indexes for series by microgenre



- Spy content performs distinctly well in Turkey where the microgenre has 1.8 times the average demand but well below the average number of titles.
- Romance content has below average demand in every other market in this report but here it has over 1.5 times the demand of the average microgenre.
- The difference in demand for true crime documentaries and other crime content in Turkey is striking. While crime content in general has above average demand, the very low demand for true crime reflects the lower demand for documentaries in this market.

THE TOP 20 MOST IN-DEMAND NEW AND RETURNING SERIES IN TURKEY

Series Name	Original Platform	Genre	Difference from Market Average (X times)
1 Çukur	Show TV	Action and Adventure	28.3
2 Hercai	ATV	Drama	22.7
3 Mucize Doktor	FOX Türkiye	Drama	18.9
4 Kuzey Yıldızı	Show TV	Drama	18.2
5 Ada Masalı	Star TV	Comedy	18.2
6 Savaşçı	FOX Türkiye	Action and Adventure	16.8
7 Eşkiya Dünyaya Hükümdar Olmaz	ATV	Drama	16.2
8 The Walking Dead	AMC	Drama	16.2
9 Yasak Elma	FOX Türkiye	Drama	16.0
10 Sihirli Annem	Kanal D	Comedy	15.9
11 The Ambassador's Daughter (Sefirin Kızı)	Star TV	Drama	15.6
12 Bir Zamanlar Çukurova	ATV	Drama	15.5
13 Back Streets (Arka Sokaklar)	Kanal D	Drama	15.5
14 Güldür Güldür Show	Show TV	Comedy	14.2
15 Kuruluş: Osman	ATV	Drama	14.0
16 Niloya	YouTube	Children	14.0
17 Masumlar Apartmanı	TRT 1	Drama	13.9
18 WandaVision	Disney+	Action and Adventure	13.4
19 Uyanış: Büyük Selçuklu	TRT 1	Drama	12.7
20 Kırmızı Oda	TV8	Drama	12.5

*New and returning series are series which released new episodes in the past year (Sep 1 2020 – Aug 31 2021).

APPENDIX

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



DEFINITION OF “DIGITAL ORIGINAL” SERIES



We define a “digital original series” as a multi-episode series where the most recent season was produced or first made available on a streaming platform. Once we define a title as a digital original, we regard the original streaming platform to be the same in all markets. For example, *The Handmaid's Tale* is considered a Hulu digital original, in all markets, even if Hulu is not currently available in a given territory. Where a streaming platform has ordered a new season following a cancellation (e.g. *Lucifer* from Fox),

we regard the series to be a network original until the new season is launched by the streaming platform; at that point we regard the series to be a “digital original”. We therefore include, for example, *Black Mirror* in our definition of a digital original series. Originally on UK's Channel 4 for the first two seasons, Netflix has since acquired the rights and commissioned seasons 3 and 4.

[We include developed, acquired and co-licensed originals](#)

Furthermore, we include in our definition all developed originals (titles that were developed, produced and released by the SVOD service that airs them, e.g. *Stranger Things*) as well as acquired originals (titles developed and produced



by a third-party studio, but where the streaming platform has acquired exclusive rights to air the series, e.g. *The Crown*). We think it is also fair to treat co-produced and co-licensed titles such as *The End of the F*** World* and *Frontier* as digital originals. With the proliferation of new streaming platforms, sometimes a different platform is considered the original streaming network. Consider for example what the original network for *Star Trek: Discovery* should be? In our definition we take this to be CBS All Access, despite Netflix owning the exclusive rights to the series in most non-US markets. *Star Trek: Discovery* is therefore a digital original and we take CBS All Access to be the original (streaming) platform, not Netflix, in all markets.

We exclude licensed originals and licensed series

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

METHODOLOGY FOR DEMAND ATTRIBUTION TO THE ORIGINAL PLATFORM

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

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

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

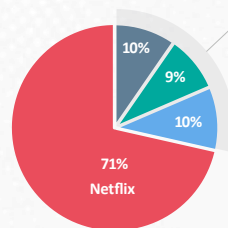
Because our global demand measurement system incorporates multiple country-specific content demand signals, we are able to gauge popularity for TV content long before a series, or platform, is officially released in its home market, or any other market.

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

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

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

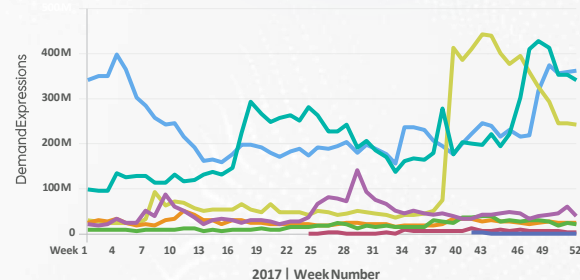
Total share of demand for platforms in 2017



Other Platforms
(CBS AllAccess, Crackle, Facebook, Apple Music, Seeso, YouTubeRed)

- Amazon
- Video Hulu
- CBS AllAccess
- Crackle
- Facebook
- Apple Music
- Seeso
- YouTubePremium

Total platform demand in 2017 (ex. Netflix)



QUANTIFYING DEMAND FOR CONTENT

1

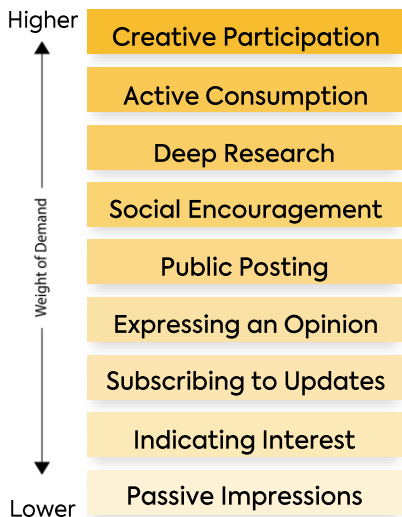
CAPTURE THE WORLD'S LARGEST AUDIENCE BEHAVIOR DATASETS



2

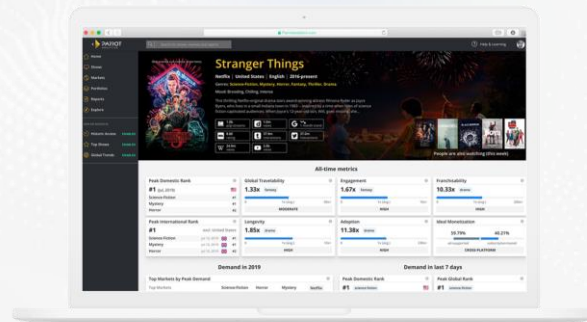
EXTRACT THE SIGNAL FROM THE NOISE

DemandRank™ System:



3

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IN ALL MARKETS



IN ALL LANGUAGES

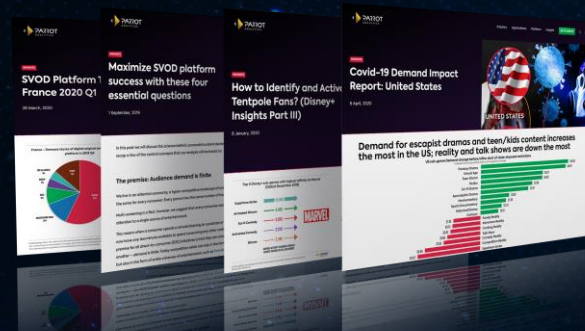
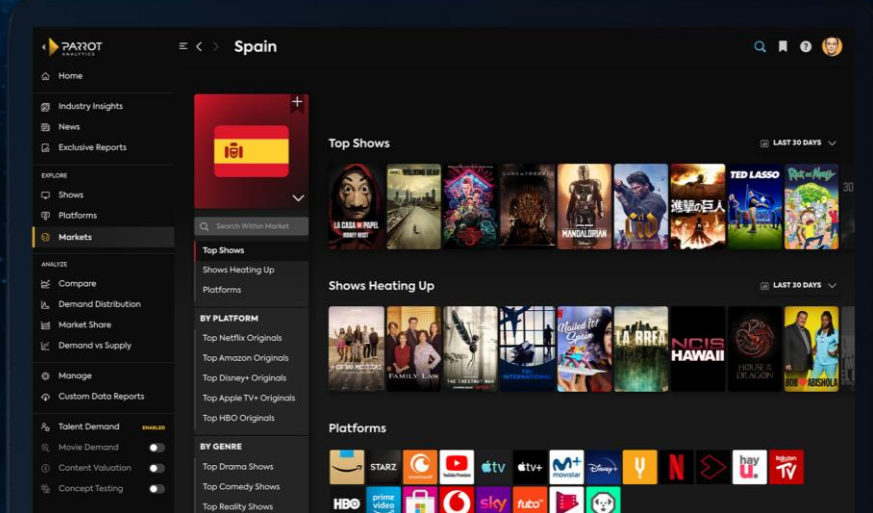


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