



April – June 2024

Quarterly Report

Platforms and Top Content Trends
Across Latin America
(Argentina, Brazil, Chile, Colombia, and Mexico)



Special Report

The second quarter of 2024 marked a dynamic period in the Latin American streaming market, characterized by intense competition among leading platforms, with Disney+ becoming more competitive after Star+ catalog migration to the platform.

The release of popular titles helped the major streaming platforms capture and retain audience interest, showcasing the power of strategic content offerings in driving demand share.

This report delves into the specifics of platform performance, analyzing the factors contributing to shifts in demand share and highlighting the standout content that defined Q2 2024 in Latin America.



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Executive Summary

Maximo Sanchez Pagano | Partner Insights Latin America Director

Understanding the entertainment landscape is key for content producers and distributors. By analyzing trends, the relevance of local content, and other insights, at Parrot Analytics we help companies to unlock the power of demand into revenue-generating opportunities.



Latin America

Although Netflix maintains the highest demand share in Latin America, Q2 2024 was one of the most competitive quarters in the recent past, with Max rising to the second position.

Considering the premiere month window, "Inside Out 2" and "House of the Dragon" were the most in-demanded titles released in the quarter. Regarding digital originals only, Prime Video's "The Boys" stands out among TV shows, and "The Idea of You" among movies.

Latin markets specificities

Argentina

Compared to the other Latin American markets analyzed, Max has its highest demand share in Argentina.

Brazil

In Brazil, "House of the Dragon" is the main highlight among TV series, generating an exceptional demand of 115 times the average title.

Chile

Disney+ has its highest demand share in the Chilean market, reaching the second position and surpassing Max and Prime Video, being only behind Netflix.

Colombia

Vix reaches its highest demand share in the Colombian market, securing the fifth position in the country among the major platforms.

Mexico

Similar to the Latin American average, Netflix and Max generate the highest demand share in Mexico.



Streaming Landscape In Latin America

Q2 2024



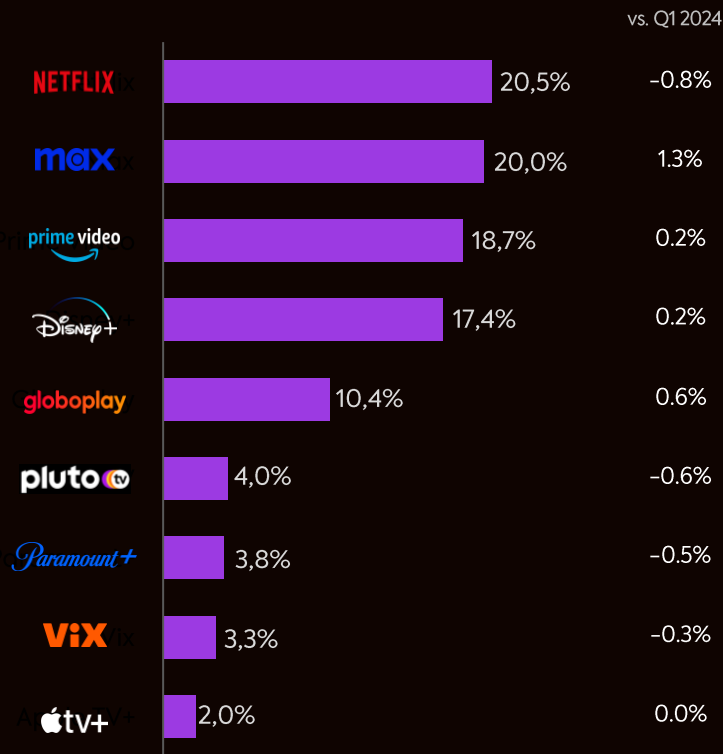
Disney+ strengthens its position as a more competitive platform with Star+ content integration

In terms of demand share among the leading streaming platforms in Latin America, Netflix remains in the lead. However, Q2 2024 proved to be a more competitive quarter than the previous one, with the region's four major platforms standing out due to the release of some of their flagship shows.

Max grew by 1 percentage point compared to the previous quarter, thanks to the premiere of "House of the Dragon" season 2, which is currently Warner Bros. Discovery's most in-demand active IP. As a result, Prime Video dropped a position in the ranking. Despite the outstanding demand for "The Boys" and "Fallout" in the region, these releases could not compete with the "Game of Thrones" spin-off.

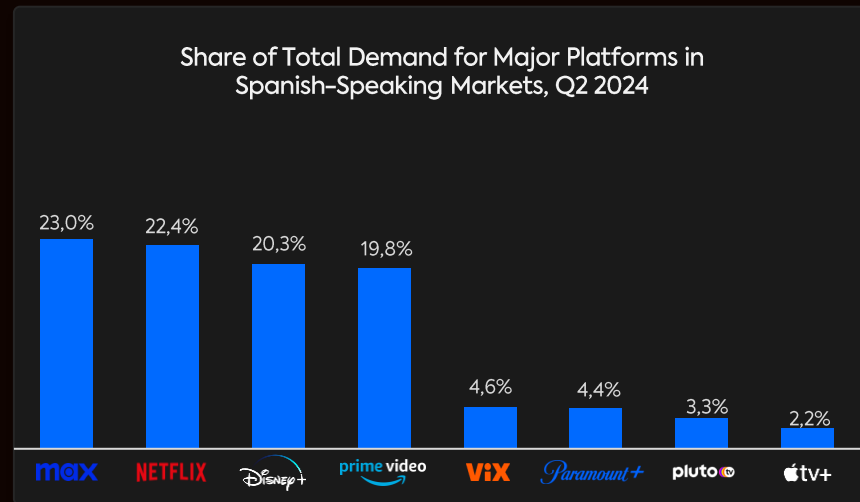
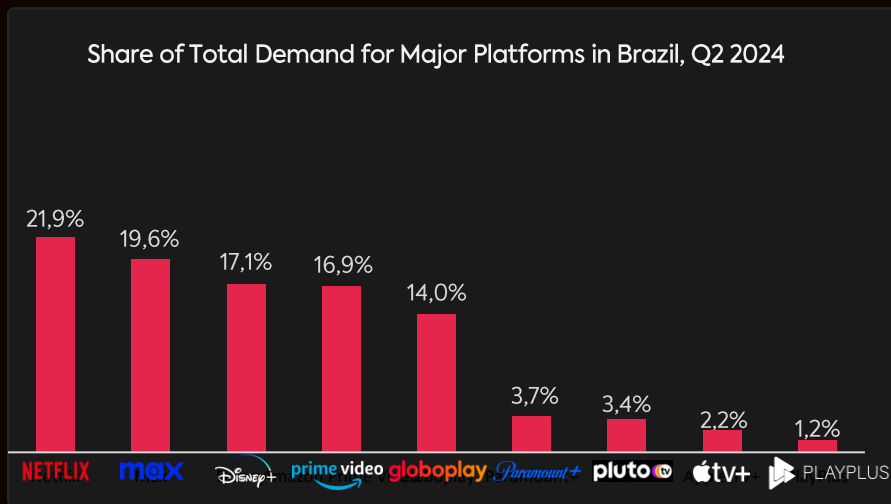
Finally, Disney+ reached double digits by adding IPs that were previously exclusive to Star+. Compared to the previous quarter, the new Disney+ remained stable in terms of the combined demand share of Disney's platforms. Among other platforms, Globoplay showed the highest level, also reaching double digits due to an increase in demand share compared to the previous quarter.

Share of Total Demand by Main Platforms
Latin America | Full Catalog | Q2 2024



Netflix maintains leadership in Brazil, while Max grows its demand share to take the top spot in Spanish-speaking markets

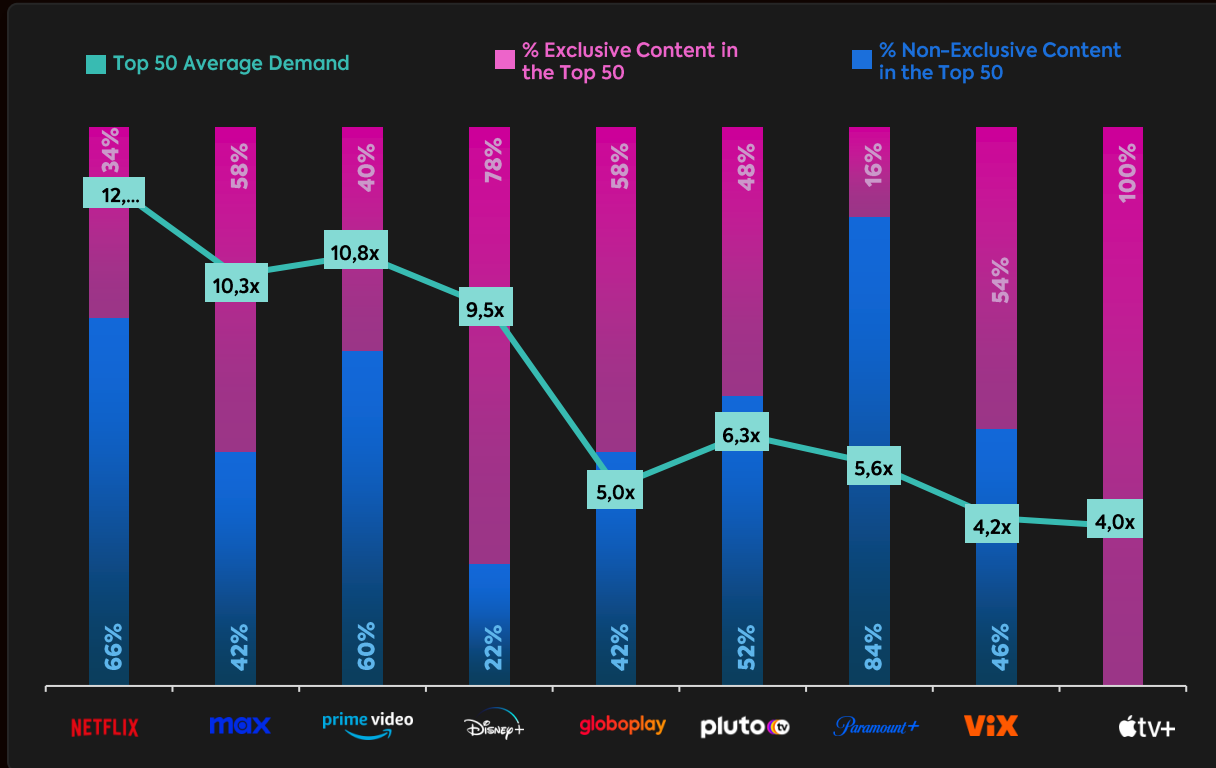
Despite its growth in demand share in Brazil, Max was unable to dethrone Netflix, which holds just over one-fifth of the total demand share in the region. Netflix has "Bridgerton" season 3 release as its main highlight in the market. Even with its increase from the previous quarter, Globoplay remains in fifth position in the Brazilian market, trailing behind Disney+ and Prime Video, which have similar levels.



Focusing solely on the Spanish-speaking markets, "House of the Dragon" drove Max demand and the platform managed to increase its demand share to secure the top spot, pushing Netflix to second place. Among other platforms, Vix ranks fifth, surpassing Paramount+, Pluto, and Apple TV+, despite a slight decline compared to the previous quarter.

Netflix leads with the highest demand for top series across platforms

Top 50 Series by each Major Platform and their distribution in Latin America, Q2 2024



Analyzing the top 50 highest-performing series on each platform, Netflix demonstrates the strength of its portfolio by achieving the highest average demand per title, maintaining a solid lead over the second place. Of Netflix's top 50, 66% are non-exclusive content, and among the platforms' originals released this quarter, "Bridgerton" and "Baby Reindeer" stand out.

In this comparison, Prime Video boasts a higher average demand than Max. Despite having 60% of its top 50 being non-exclusive content, Prime Video's originals lead its ranking, with "The Boys" being a highlight.

Both Max and Disney+ showcase a higher percentage of exclusive series. However, their standout titles are original productions from their linear channels, such as "House of the Dragon" (HBO) for Max and "The Simpsons" (FOX) for Disney+.

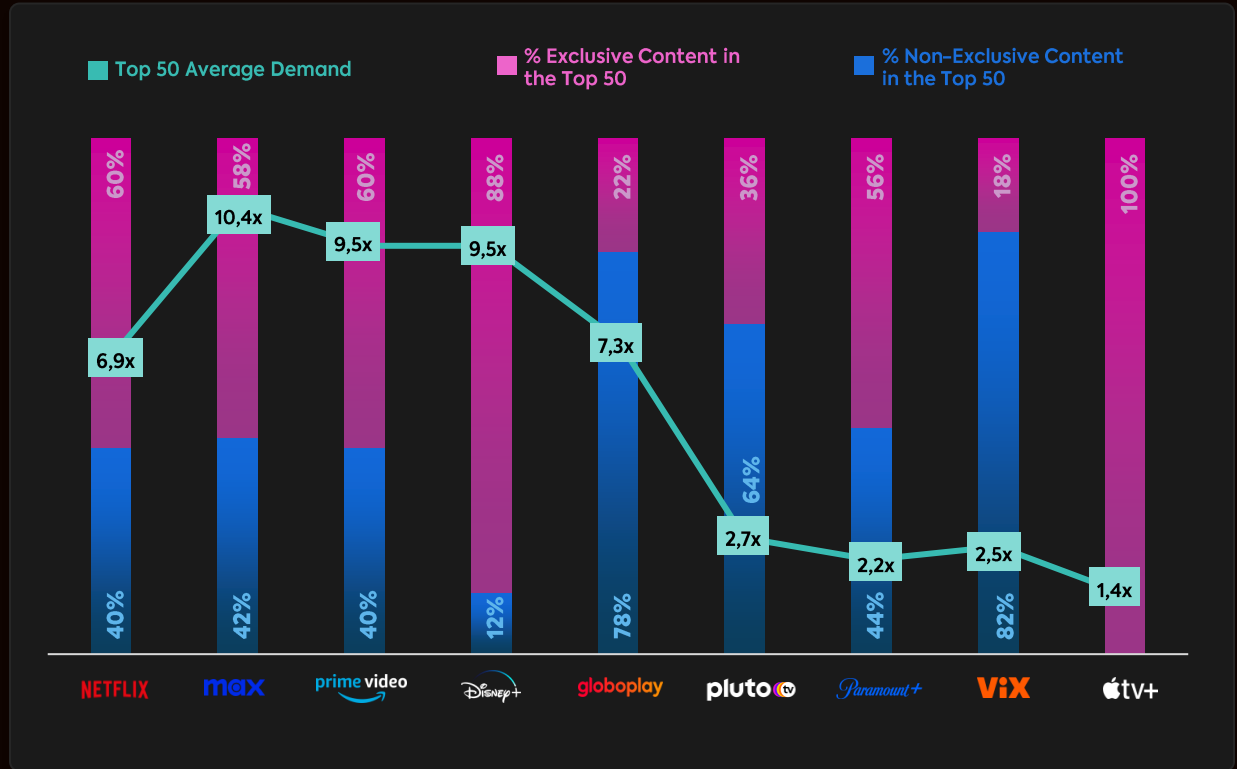
In the film category, Netflix falls behind four platforms, with Max leading in average demand

Top 50 Movies by each Major Platform and their distribution in Latin America, Q2 2024

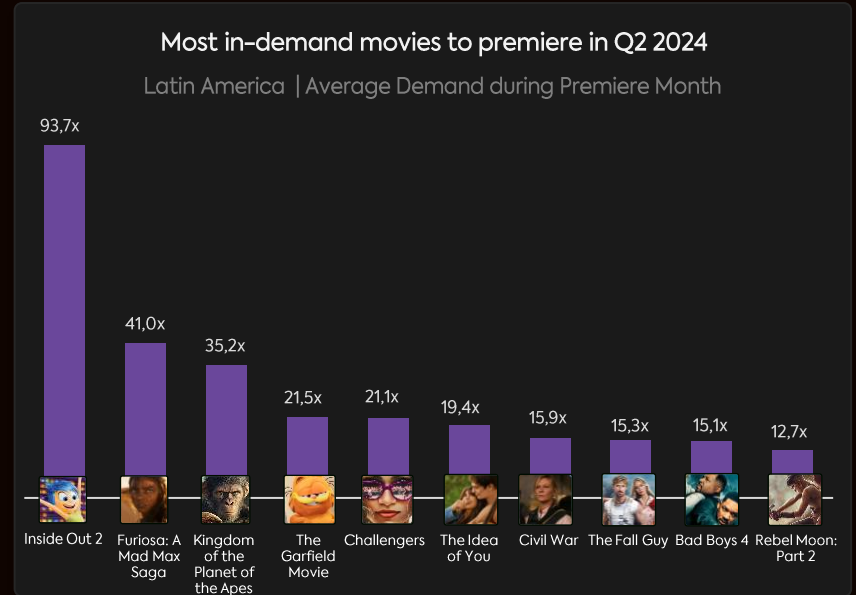
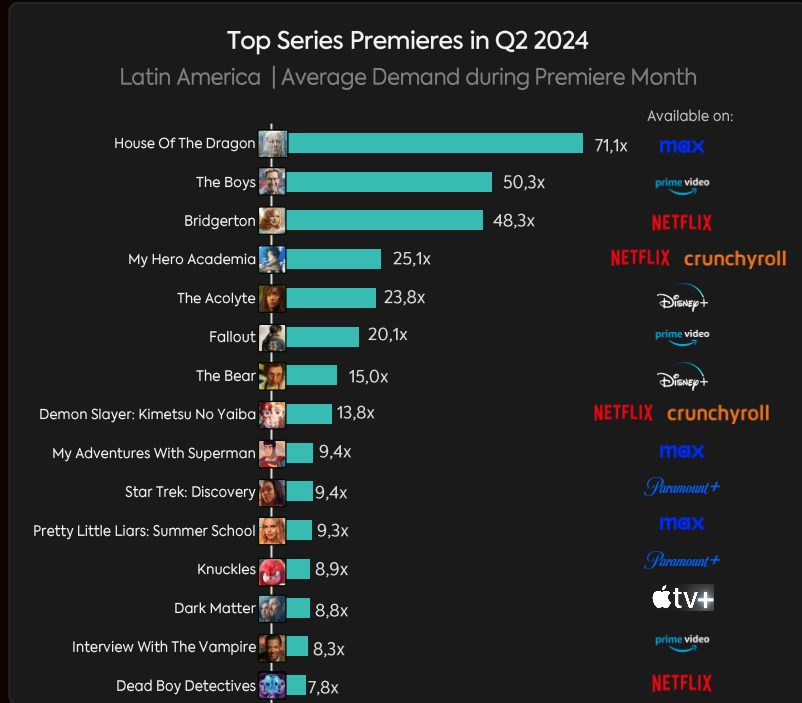
Four of the five platforms with the highest average demand show a greater concentration of exclusive content in their respective Top 50. Max, which boasts the highest average demand per title, stands out with Warner Bros. Pictures properties such as "Godzilla X Kong: The New Empire" and "Dune: Part 2".

Prime Video and Disney+ are tied for second place. Disney has the second-highest percentage of exclusive titles across all major platforms, only behind Apple TV+, the most in-demand titles available on Disney+ are generally part of its popular theatrical franchises.

Despite Amazon having licensed titles among its most in-demand films, the platform also stands out by having the most in-demanded original streaming film released this quarter with "The Idea of You".



Taking into account only the TV series that premiered a new season in the quarter, the leading platforms released competitive titles in Q2. With a diverse range of genres in the rankings, the most in-demand titles are generally returning series, with "The Acolyte" and "Fallout" being the highest-ranked newcomers. Due to the premiere of major international IPs, no Latin series made it into the top 15.



Among the most in-demanded movies that premiered in Q2 2024, "Inside Out 2" was the big winner of the quarter, registering exceptional demand in the region with a solid advantage for the second place. Additionally, action and adventure films once again dominated the rankings, taking half of the top 10 spots. Among streaming originals, the romantic comedy "The Idea of You" (Prime Video) and the action and adventure "Rebel Moon: Part 2" (Netflix) stand out.

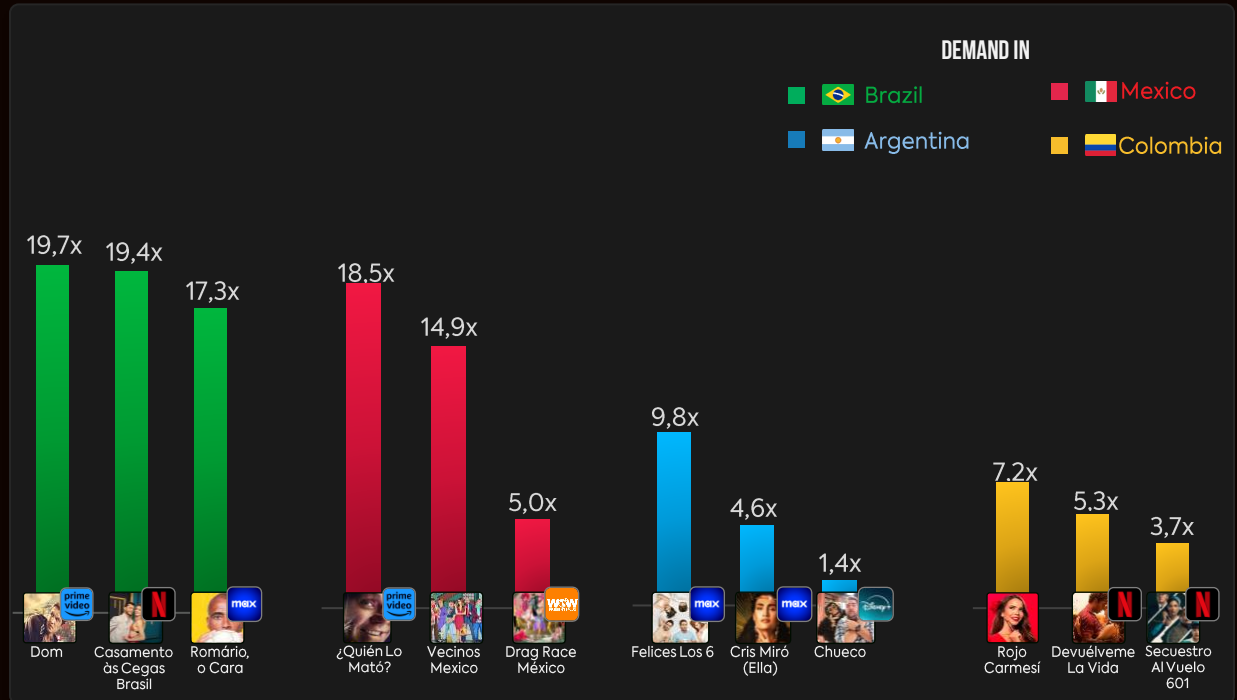
Considering only Latin titles, Brazilian and Mexican series generated the highest demand in their respective local markets

Top Latin TV Shows Released in Q2 2024 during Premiere Month

In Q2 2024, Brazilian and Mexican titles recorded the highest demand levels when considering the performance of local titles in their respective home markets.

Each country stands out with shows from different genres, reflecting cultural preferences and specific genre appeal in each market. In Brazil, an action series and a dating reality show are at the top. In Mexico, a true crime title leads, Argentina features a comedy, while in Colombia a telenovela tops the demand.

Among platforms, there is a varied distribution of preferences. The three most popular Brazilian series are all digital originals, each distributed by a different player, while in Mexico, Prime Video stands out, Max in Argentina, and Netflix in Colombia.

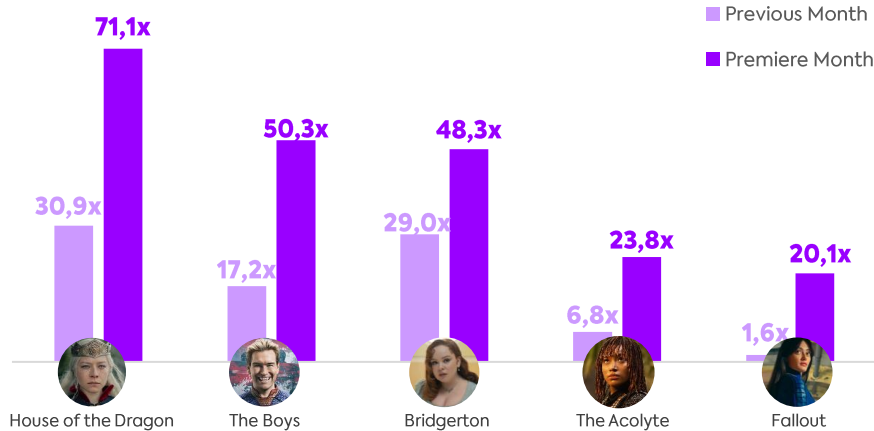


Quarter highlight: The Platforms TV Shows Highlights



All four major platforms released competitive titles this quarter

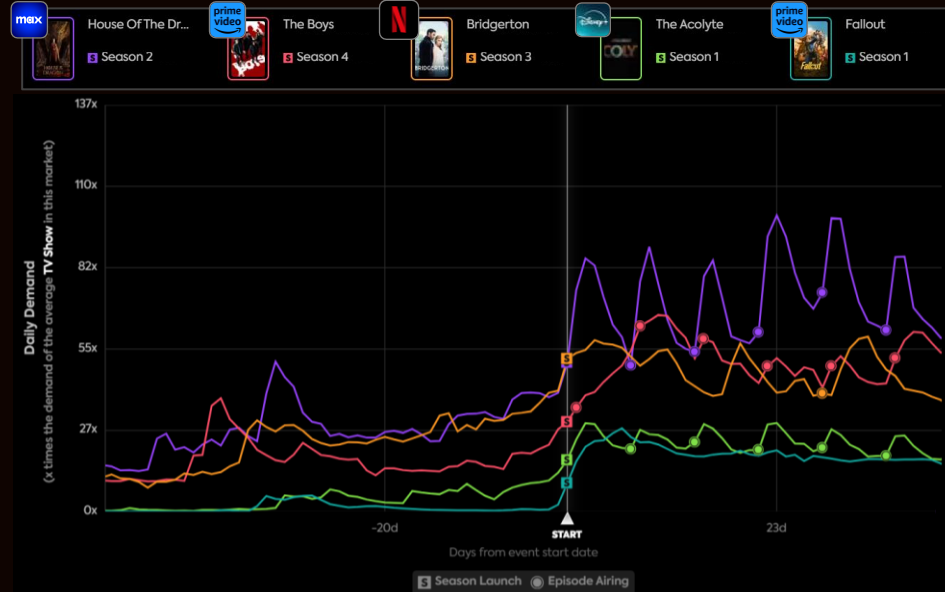
Highlighted shows released in the quarter | Average Demand Premiere Month vs Previous Month



When analyzing the top shows from the main platforms with new episodes released this quarter, returning series like "House of the Dragon", "The Boys", and "Bridgerton" already exhibit a high level of demand prior to their respective season premieres, indicating the expectation of an engaged audience for these new episodes. In contrast, new series such as "The Acolyte" and "Fallout", which were developed from existing IPs, show above-average demand but not on the same level as the others, with the highest percentage growth during their premiere month compared to the previous one.

Top Adult Animation Series with New Episodes released between Q4 23 and Q1 24

Time-Shift | Latin America | Daily Demand



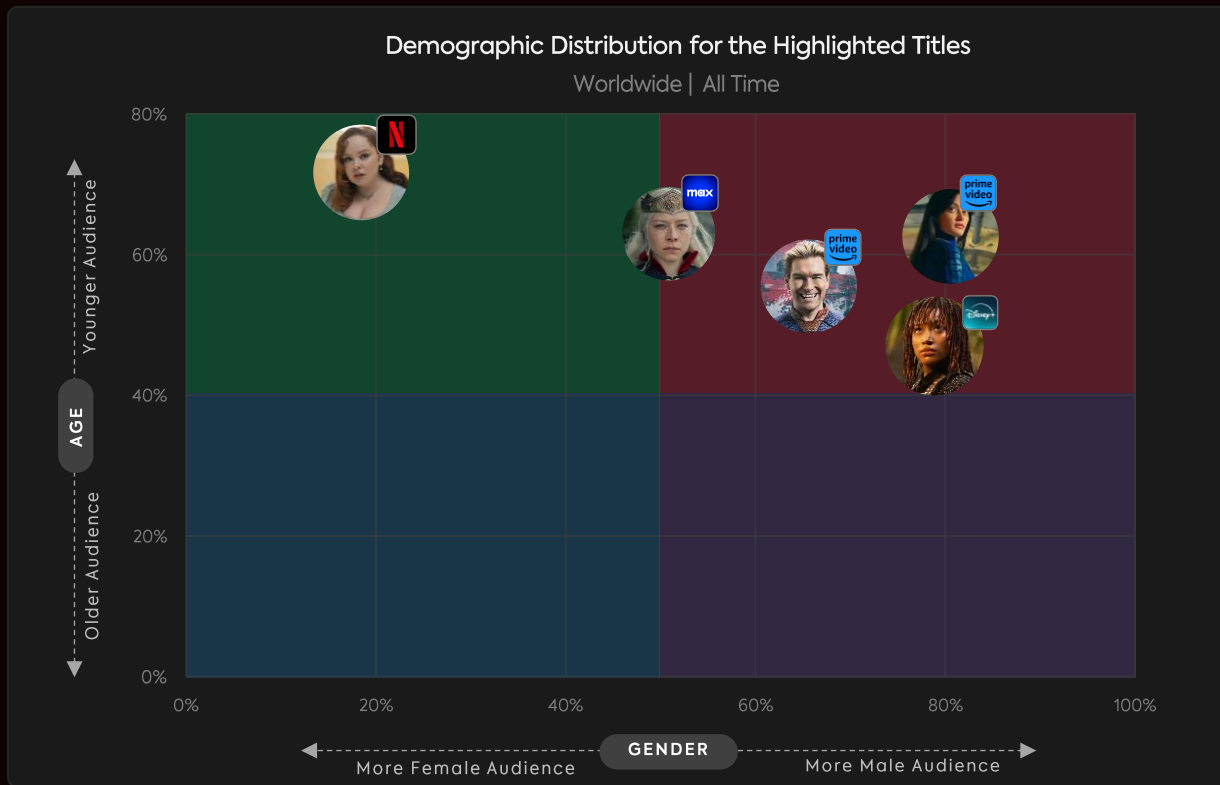
Understanding the dynamics each platform employs for these IPs is crucial. By tracking pre-launch demand, we can gauge how series promotion has influenced audience interest. Additionally, the release strategy plays a significant role. "House of the Dragon" and "Bridgerton" recorded similar demand on the day their new seasons premiered in Latin America. However, while "House of the Dragon" had a weekly release, encouraging an intense discussions and theories about its storyline, "Bridgerton" was divided into two parts, lacking a continuous novelty factor.

All the highlighted titles have a skew toward younger audiences

Despite being from different platforms, all the titles analyzed show a greater breakdown among younger audiences. "The Acolyte", part of the Star Wars universe, exhibits the greatest generational balance.

"Bridgerton", based on the books by Julia Quinn, has the highest concentration among younger viewers. Regarding gender, the show, that is also the only romantic drama in the group, stands out with a female audience skew.

Meanwhile, "House of the Dragon", the most in-demand series on the list, shows a more balanced audience between men and women, while the newcomers "The Acolyte" and "Fallout" have the highest breakdown among males.



Market-specific content trends

Share of demand by platform and most in-demand series and movies

This section presents our latest Latin demand data trends. For each of the 5 main territories examined, we reveal each market's demand share by platform.

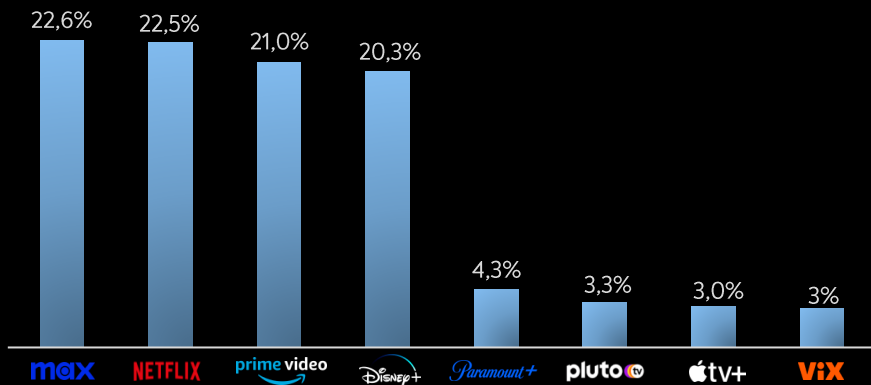
We also present our findings on a title level, identifying the top 3 TV series and Movies that premiered or had a new season in Q2 2024 with the highest demand in the market analyzed.





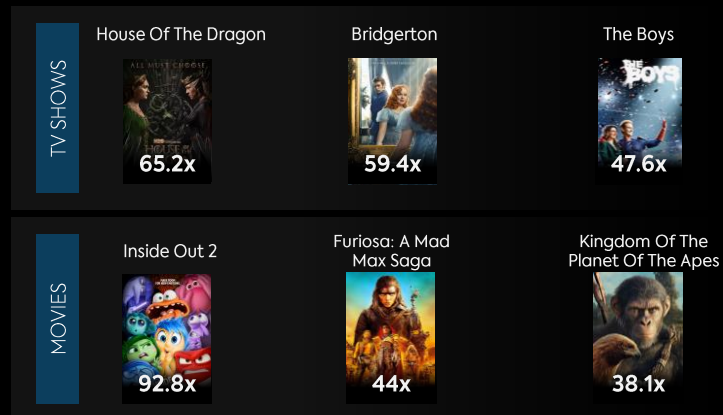
Argentina Platform and Titles Preferences

Share of Total Demand for full platform in Q2 2024



- Max is the leader in Argentina, having the highest demand share across the individual Latin markets.
- Once again, Apple TV+ surpassed Vix demand share by generating its highest rate across the region, what didn't happen in other Spanish-speaking markets.

The 3 most in-demand titles that premiere/had a new season in Q2 2024



- Argentina has the same top 3 most in-demanded shows as the Latin America average. However, "Bridgerton" in Argentina rise to the second position, generated a demand higher than "The Boys".
- Among films, the result is similar. However, the top three titles in Argentina maintain the same order in the country's ranking as in the average across Latin America, with "Inside Out 2" generating the highest average demand.

Note: Considering 28 days after each premiere as the date range. Excluding News shows. For Movies, considering their domestic release date.



Top 15 Latin Series in Argentina

Average Demand in Q2 2024

	SERIES NAME	ORIGINAL PLATFORM	GENRE	DIFFERENCE FROM AVERAGE TITLE (1X) IN Q2 2024	
1	<i>Gran Hermano Argentina</i>	Telefe	Reality	31.8	
2	<i>El Encargado</i>	Star+	Comedy	18.3	
3	<i>El Payaso Plim Plim</i>	Disney Junior	Children	18.1	
4	<i>La Granja De Zénon</i>	YouTube	Children	17.6	
5	<i>Canciones Del Zoo</i>	YouTube	Children	17.2	
6	<i>Bichikids</i>	YouTube	Children	17.1	
7	<i>La Rosa De Guadalupe</i>	Las Estrellas	Drama	14.3	
8	<i>Bailando Por Un Sueño</i>	Canal 9	Reality	12.0	
9	<i>Como Dice El Dicho</i>	Las Estrellas	Drama	11.9	
10	<i>Vivir De Amor</i>	Las Estrellas	Drama	10.1	
11	<i>Paco El Marinero</i>	YouTube	Children	10.0	
12	<i>Galinha Pintadinha</i>	YouTube	Children	9.4	
13	<i>Coppola, El Representante</i>	Star+	Drama	9.3	
14	<i>La Familia Blu</i>	YouTube	Children	9.1	
15	<i>Felices Los 6</i>	Max	Comedy	8.1	

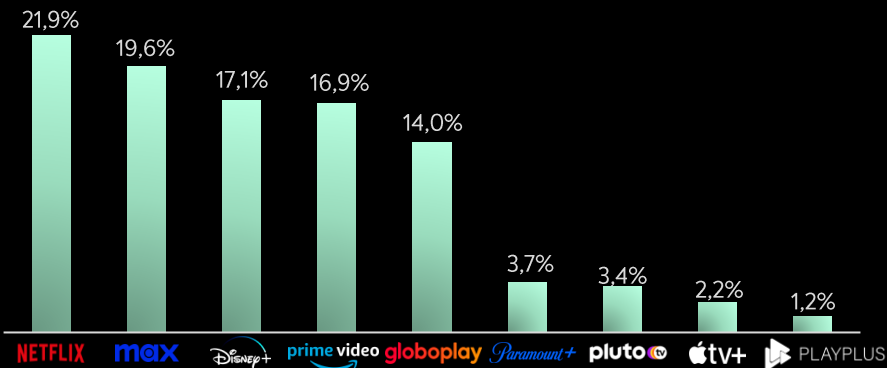
Note: Considering only shows that had a premiere/new season in the last 12 months. Demand in Q2 2024. Excluding News shows.





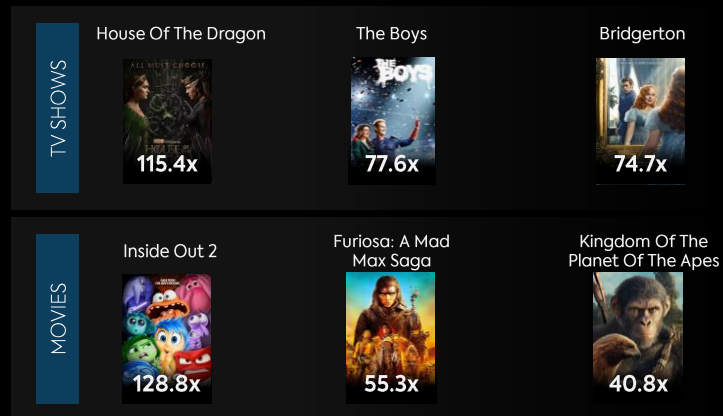
Brazil Platform and Titles Preferences

Share of Total Demand for full platform in Q2 2024



- With the Star+ content migration to Disney+, Globoplay decrease one spot in the ranking, although the platform is still competitive in the market.
- Apple TV+ is still behind the other major streaming services, however, compared to PlayPlus, the other local platform, the streaming service generated a higher demand.

The 3 most in-demand titles that premiere/had a new season in Q2 2024



- Despite having the same films and series from the Latin American ranking registering the highest demand in Brazil, all six highlighted titles have their highest average demand in the Brazilian market compared to the other individual Latin markets.
- Additionally, it's only in the Brazilian market that "House of the Dragon" manages to record an exceptional demand of more than 100 times the average title, indicating a particularly strong engagement of this audience with the Game of Thrones universe.

Note: Considering 28 days after each premiere as the date range. Excluding News shows. For Movies, considering their domestic release date.



Top 15 Latin Series in Brazil

Average Demand in Q2 2024

	SERIES NAME	ORIGINAL PLATFORM	GENRE	DIFFERENCE FROM AVERAGE TITLE (1X) IN Q2 2024	
1	<i>Big Brother Brasil</i>	TV Globo	Reality	32.0	
2	<i>Renascer</i>	TV Globo	Drama	27.2	
3	<i>Sintonia</i>	Netflix	Drama	22.1	
4	<i>Porta Dos Fundos</i>	YouTube	Comedy	21.5	
5	<i>Galinha Pintadinha</i>	YouTube	Children	21.4	
6	<i>MasterChef Brasil</i>	BAND	Reality	20.0	
7	<i>Programa Do Ratinho</i>	SBT	Variety	20.0	
8	<i>De Férias Com O Ex</i>	MTV	Reality	19.3	
9	<i>A Fazenda</i>	Record	Reality	18.7	
10	<i>Jacarelvís E Amigos</i>	YouTube	Children	18.1	
11	<i>A Praça é Nossa</i>	SBT	Comedy	18.0	
12	<i>Bob Zoom</i>	YouTube	Children	17.9	
13	<i>Que História é Essa, Porchat?</i>	GNT	Variety	17.4	
14	<i>Programa Sílvio Santos</i>	SBT	Variety	17.1	
15	<i>Domingo Legal</i>	SBT	Variety	17.0	

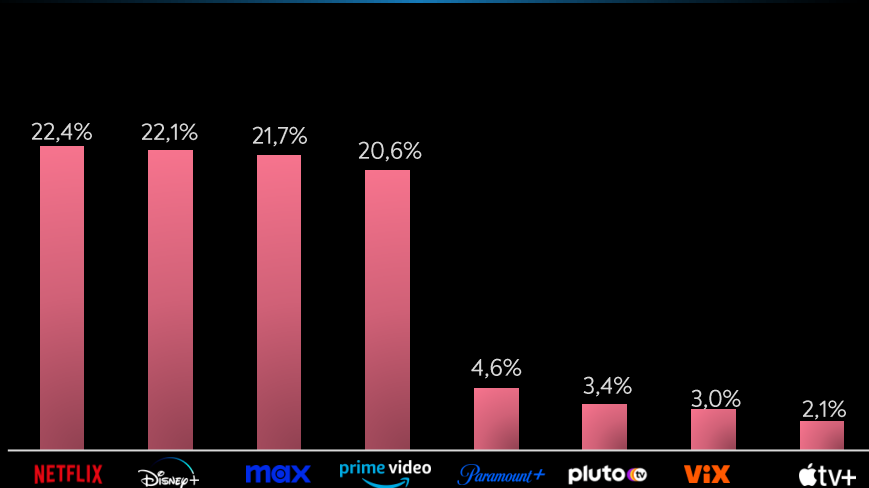
Note: Considering only shows that had a premiere/new season in the last 12 months. Demand in Q2 2024. Excluding News shows.





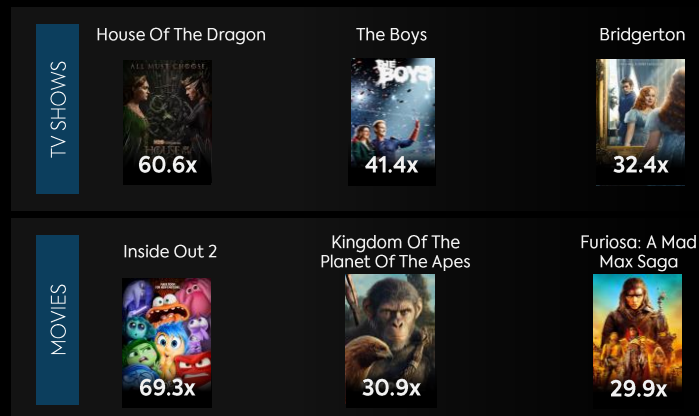
Chile Platform and Titles Preferences

Share of Total Demand for full platform in Q2 2024



- The three platforms with the highest demand share show some of the greatest competitiveness in Chile, with the first place having the smallest competitive advantage among the markets analyzed.
- Disney+ has its highest demand share in the Chilean market, reaching the second position and surpassing Max and Prime Video. Among Disney+ titles, "The Acolyte", part of the Star Wars franchise, stands out among the productions released this quarter.

The 3 most in-demand titles that premiere/had a new season in Q2 2024



- Like happened to the Latin American ranking, "House of the Dragon", "The Boys", and "Bridgerton" generated the highest demand in Chile among the releases of the quarter.
- Differently from other Latin markets, "Kingdom Of The Planet Of The Apes" reached the second highest average demand in Chile, surpassing "Furiosa: A Mad Max Saga".

Note: Considering 28 days after each premiere as the date range. Excluding News shows. For Movies, considering their domestic release date.



Top 15 Latin Series in Chile

Average Demand in Q2 2024

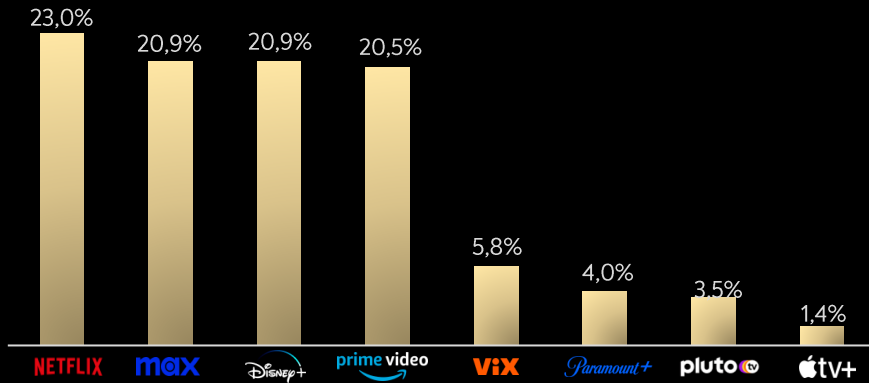
	SERIES NAME	ORIGINAL PLATFORM	GENRE	DIFFERENCE FROM AVERAGE TITLE (1X) IN Q2 2024	
1	<i>El Payaso Plim Plim</i>	Disney Junior	Children	14.5	
2	<i>Carmen Gloria A Tu Servicio</i>	Televisión Nacional de Chile	Variety	13.5	
3	<i>La Rosa De Guadalupe</i>	Las Estrellas	Drama	13.3	
4	<i>Bichikids</i>	YouTube	Children	13.2	
5	<i>La Granja De Zénon</i>	YouTube	Children	13.1	
6	<i>Canciones Del Zoo</i>	YouTube	Children	13.1	
7	<i>Contigo En La Mañana</i>	Chilevisión	Variety	10.9	
8	<i>Como Dice El Dicho</i>	Las Estrellas	Drama	10.6	
9	<i>Gran Hermano Argentina</i>	Telefe	Reality	8.9	
10	<i>Bob Zoom</i>	YouTube	Children	6.8	
11	<i>Vivir De Amor</i>	Las Estrellas	Drama	6.4	
12	<i>Galinha Pintadinha</i>	YouTube	Children	5.8	
13	<i>La Divina Comida</i>	Chilevisión	Reality	4.3	
14	<i>La Voz Kids Colombia</i>	Caracol	Reality	3.9	
15	<i>Casado Con Hijos Chile</i>	Mega	Comedy	3.5	

Note: Considering only shows that had a premiere/new season in the last 12 months. Demand in Q2 2024. Excluding News shows.



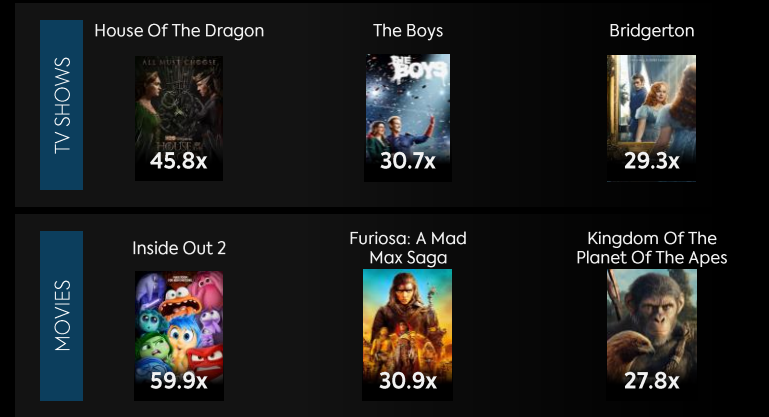
Colombia Platform and Titles Preferences

Share of Total Demand for full platform in Q2 2024



- Once again, Colombian is the country alongside Ecuador where Netflix has the highest demand share considering the Latin American markets analyzed.
- Max, Disney+, and Prime Video show very similar levels of demand in the race for second place.
- Additionally, Vix stands out in the Colombian market by achieving almost 6% of the total demand share, reaching an overall fifth position. This performance underscores Vix's growth and the telenovelas relevance in Colombia .

The 3 most in-demand titles that premiere/had a new season in Q2 2024



- Like happened to the Latin American ranking, "House of the Dragon", "The Boys", and "Bridgerton" generated the highest demand in Colombia among TV shows released in the quarter. "Inside Out 2", "Furiosa: A Mad Max Saga", and "Kingdom Of The Planet Of The Apes" also generated the highest demand in the market among movies released in the quarter.

Note: Considering 28 days after each premiere as the date range. Excluding News shows. For Movies, considering their domestic release date.





Top 15 Latin Series in Colombia

Average Demand in Q2 2024

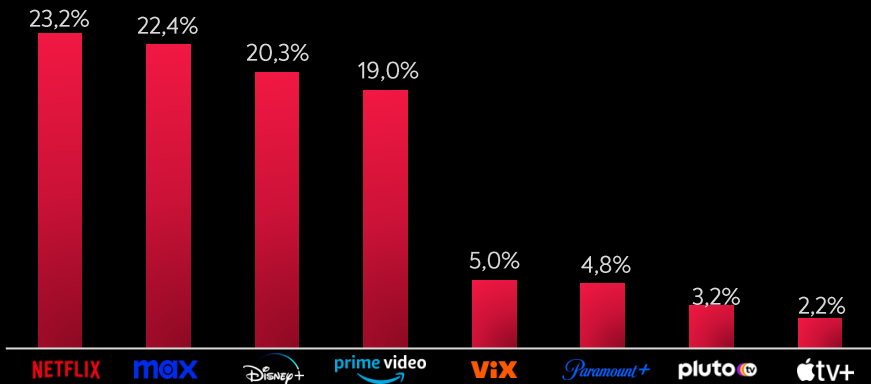
	SERIES NAME	ORIGINAL PLATFORM	GENRE	DIFFERENCE FROM AVERAGE TITLE (1X) IN Q2 2024	
1	<i>La Rosa De Guadalupe</i>	Las Estrellas	Drama	15.1	
2	<i>La Casa De Los Famosos Colombia</i>	RCN	Reality	14.7	
3	<i>El Payaso Plim Plim</i>	Disney Junior	Children	14.4	
4	<i>La Granja De Zénon</i>	YouTube	Children	14.1	
5	<i>La Voz Kids Colombia</i>	Caracol	Reality	13.1	
6	<i>Canciones Del Zoo</i>	YouTube	Children	12.9	
7	<i>Bichikids</i>	YouTube	Children	12.1	
8	<i>Como Dice El Dicho</i>	Las Estrellas	Drama	12.1	
9	<i>Vivir De Amor</i>	Las Estrellas	Drama	11.3	
10	<i>Galinha Pintadinha</i>	YouTube	Children	10.1	
11	<i>El Rastro</i>	Caracol	Documentary	8.4	
12	<i>Gran Hermano Argentina</i>	Telefe	Reality	6.8	
13	<i>Vecinos Mexico</i>	Las Estrellas	Comedy	6.3	
14	<i>Shark Tank Colombia</i>	Sony	Reality	5.9	
15	<i>MasterChef Celebrity Colombia</i>	RCN	Reality	5.7	

Note: Considering only shows that had a premiere/new season in the last 12 months. Demand in Q2 2024. Excluding News shows.



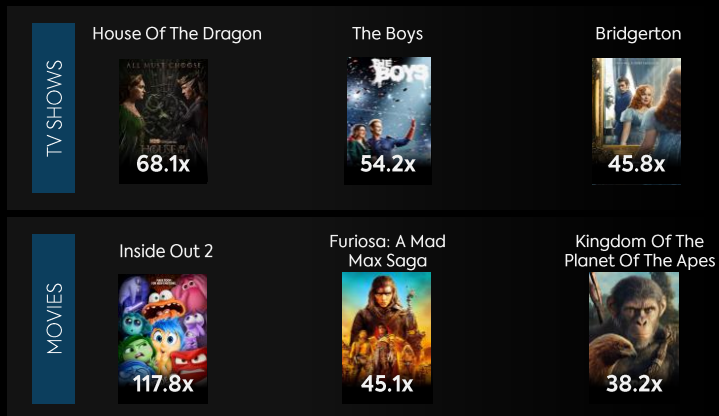
Mexico Platform and Titles Preferences

Share of Total Demand for full platform in Q2 2024



- Similar to the Latin American average, Netflix and Max generate the highest demand share in Mexico. However, Disney+ is more competitive in the market compared to the Latin American average, reaching the third position.
- Vix is also more competitive in Mexico than in the region, generating a slightly higher demand share compared to Paramount+.

The 3 most in-demand titles that premiere/had a new season in Q2 2024



- Just as seen in the Latin American and in the other individual Latin markets, “House of the Dragon”, “The Boys”, and “Bridgerton” lead in demand in Mexico among TV shows released this quarter. Additionally, “Inside Out 2”, “Furiosa: A Mad Max Saga”, and “Kingdom Of The Planet Of The Apes” are the top-performing films in the market for the same period.

Note: Considering 28 days after each premiere as the date range. Excluding News shows. For Movies, considering their domestic release date.



Top 15 Latin Series in Mexico

Average Demand in Q2 2024

	SERIES NAME	ORIGINAL PLATFORM	GENRE	DIFFERENCE FROM AVERAGE TITLE (1X) IN Q2 2024	
1	<i>La Rosa De Guadalupe</i>	Las Estrellas	Drama	21.5	
2	<i>Vivir De Amor</i>	Las Estrellas	Drama	20.1	
3	<i>Ventaneando</i>	TV Azteca	Variety	17.9	
4	<i>Como Dice El Dicho</i>	Las Estrellas	Drama	17.5	
5	<i>Vecinos Mexico</i>	Las Estrellas	Comedy	15.3	
6	<i>Shark Tank México</i>	Sony Channel	Reality	15.3	
7	<i>El Payaso Plim Plim</i>	Disney Junior	Children	14.7	
8	<i>La Granja De Zénon</i>	YouTube	Children	14.4	
9	<i>Marea De Pasiones</i>	Las Estrellas	Drama	13.8	
10	<i>Canciones Del Zoo</i>	YouTube	Children	13.7	
11	<i>¿Quién Lo Mató?</i>	Amazon Prime Video	Drama	13.5	
12	<i>Bichikids</i>	YouTube	Children	13.5	
13	<i>Galinha Pintadinha</i>	YouTube	Children	12.8	
14	<i>Gran Hermano Argentina</i>	Telefe	Reality	12.8	
15	<i>Hoy</i>	Las Estrellas	Variety	12.1	

Note: Considering only shows that had a premiere/new season in the last 12 months. Demand in Q2 2024. Excluding News shows.



Appendix

Gain an understanding of Parrot Analytics' global demand measurement capabilities

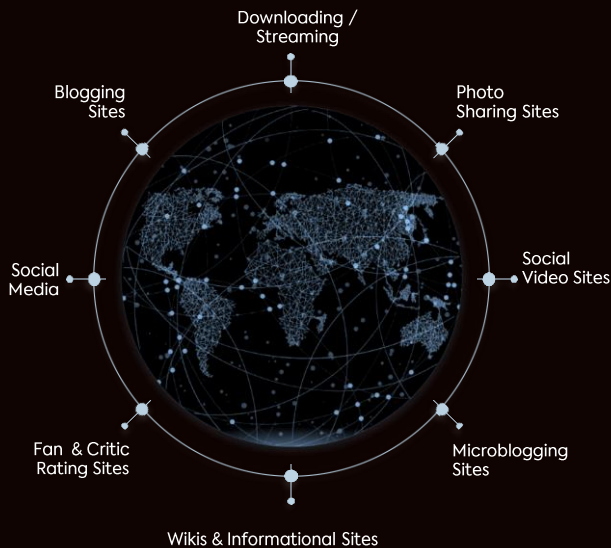


The Standard for Global Audience Demand Measurement

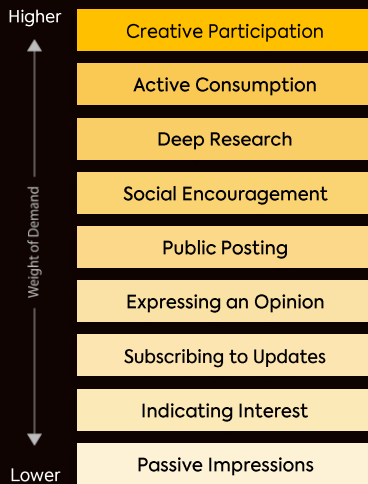
We capture the world's largest audience behavior datasets

We clean, enrich, combine and analyze the data

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



Demand System:





PARROT

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