



July – September 2024

# Quarterly Report

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



# Special Report

After a successful second quarter, where the major streaming platforms released popular IPs, the third quarter of 2024 had the movies as the main stand-out titles. With strong competition, the four major global streaming platforms still maintain the battle for Latin audience attention.

This report explores the details of platform performance, examining the factors influencing changes in demand share and spotlighting the notable content, both local and international, that shaped Q3 2024 in Latin America. It provides an in-depth look at emerging trends, offering insights into the content strategies fueling audience engagement across the region.



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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

In Q3 2024, Netflix maintained its highest demand share in Latin America, increasing its advantage over Max, which reached second place.

Considering the premiere month window, movies again stood out, with big franchises such as "Deadpool & Wolverine", "Alien: Romulus" and "Despicable Me 4" leading the top releases of the quarter.

Among local titles "Betty La Fea, La Historia Continúa" revival is the highlight.



# Latin markets specificities

## Argentina

Max maintains its lead advantage in the market, Apple TV+ reaches its highest demand share in Argentina across the Latam region.

## Brazil

Netflix has in Brazil its highest advantage competition over the second place, generating almost one-fourth of the demand in the market.

## Chile

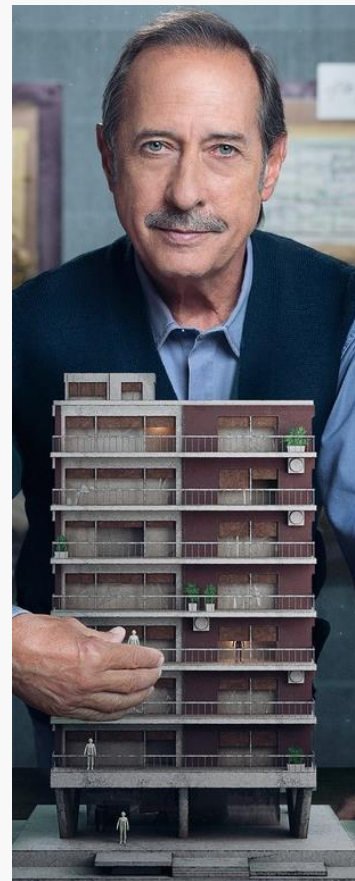
Chile is the most competitive market in the quarter, with only a 1.2 percentage point difference separating first (Max) and third place (Netflix), Disney+ has the second spot.

## Colombia

Vix still had its highest demand share in Colombia, securing the fifth position in the country among the major streaming platforms.

## Mexico

Netflix generated its highest demand share in Mexico, with Max following behind at the second position.





# Streaming Landscape In Latin America

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Q3 2024



# After a competitive Q2, Netflix expands its lead in Q3 2024

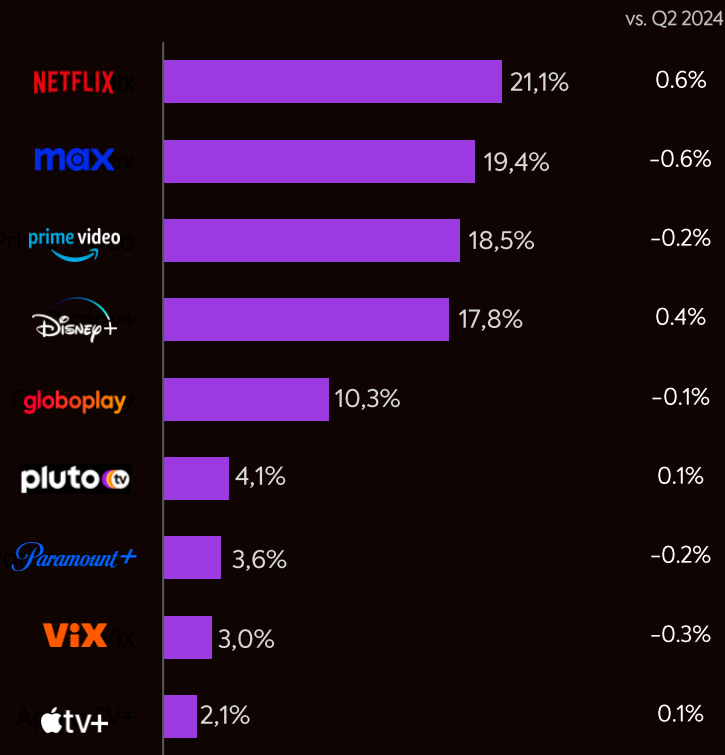
In the second quarter of 2024, Max showed strong competitiveness, driven by the success of "House of the Dragon". However, with the series ending, the platform recorded the largest decline among the major streaming platforms in the third quarter, although it managed to retain the second place. In contrast, Netflix achieved the highest growth, further solidifying its leadership in demand share.

Netflix stood out with the return of popular IPs, including the sixth season of "Cobra Kai" and the fourth season of "Emily in Paris". These productions diverge from the platform's typical release model, with a "partial binge" launch, where episodes are released in parts, this strategy sustains audience interest over time. This approach has become common for Netflix's major releases, signaling an effort to prolong engagement and keep audiences within its ecosystem.

There were no significant changes among the other platforms, with most players maintaining demand levels similar to the previous quarter. Disney+ saw a positive result, with growth driven by the release of "Agatha All Along," a Marvel series spin-off of Disney+ hit "WandaVision."

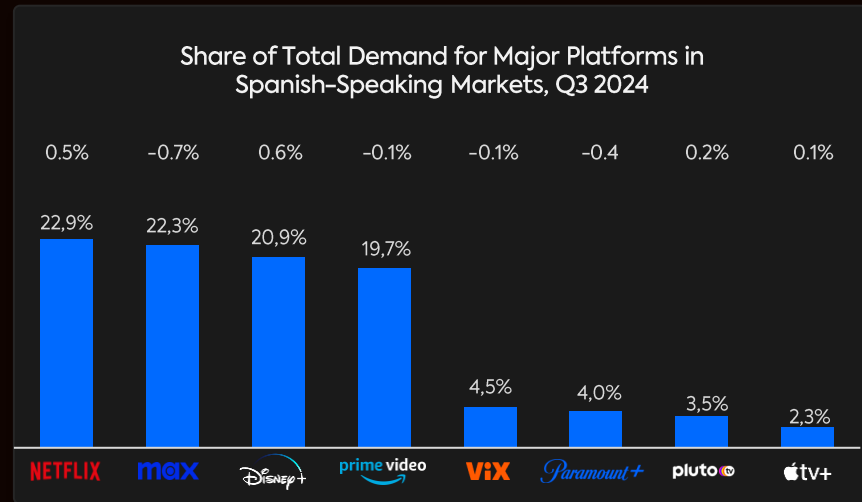
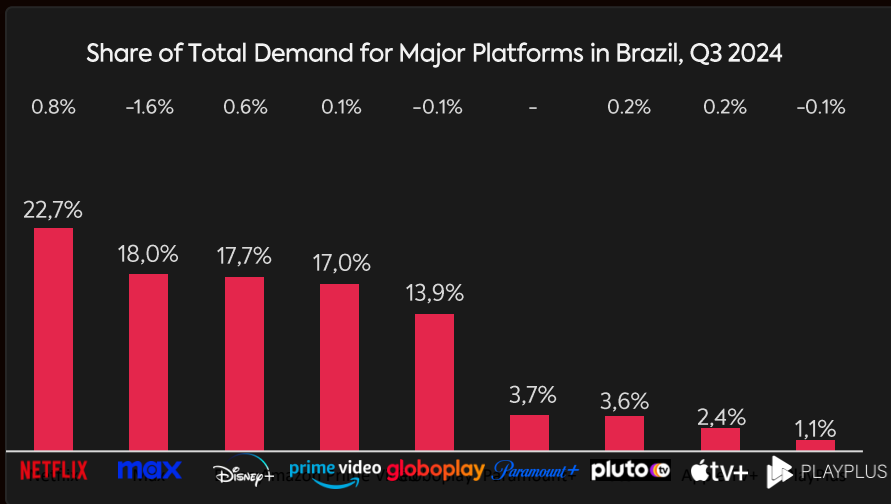
## Share of Total Demand by Main Platforms

Latin America | Full Catalog | Q3 2024



# Netflix increases its competitive edge in Brazil, while Disney+ shines in Spanish-Speaking markets

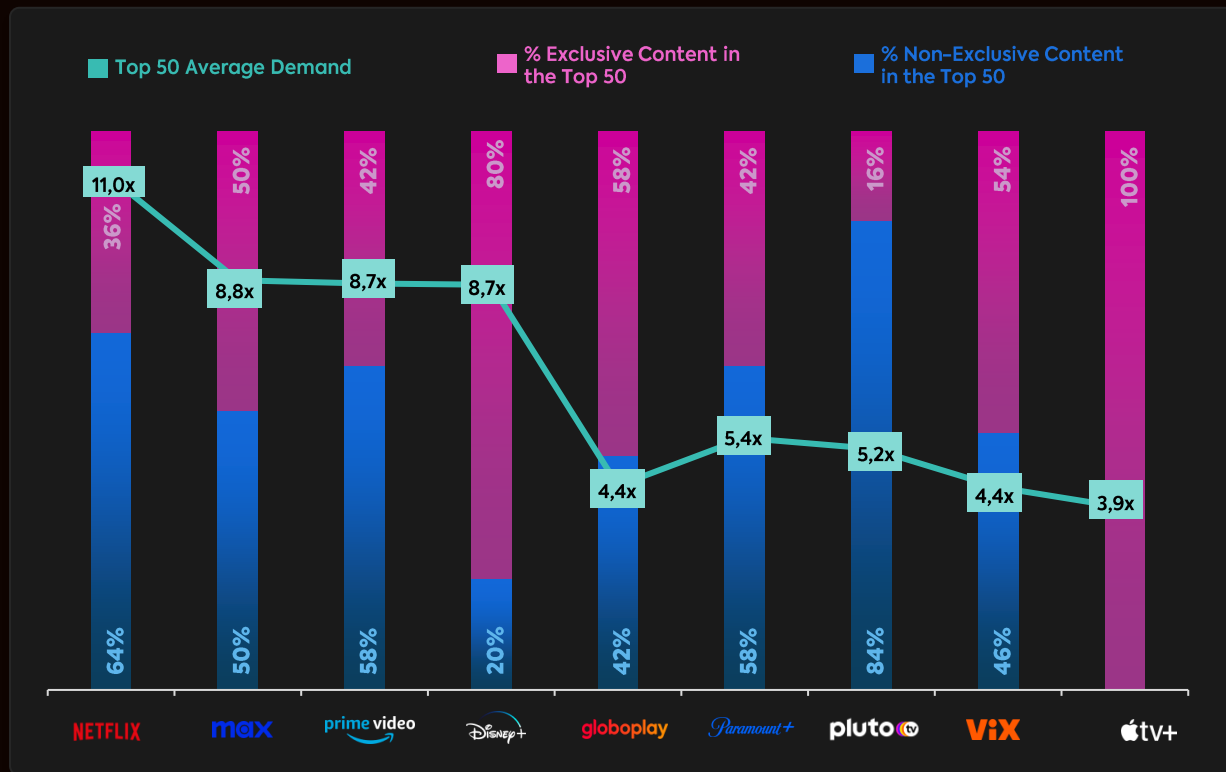
In Brazil, Max experienced a larger decline than the average across Latin America in Q3. However, it's important to note that "House of the Dragon" had the highest average demand in Brazil across the LatAm region, boosting engagement during Q2. Within this context, Netflix stands out with growth in demand share, returning to the high levels reached in the first quarter of the year and now approaching a quarter of the total market demand share.



Max also saw a decline in Spanish-speaking markets compared to the previous quarter, losing the lead it had achieved in Q2. However, the difference from Netflix, which took the top spot in Q3 2024, is marginal. Another standout in the market is Disney+, which for the first time surpassed 20% in demand share, getting closer to Netflix and Max rates.

# Netflix maintains its lead position with the highest demand for top series

Top 50 Series by each Major Platform and their distribution in Latin America, Q3 2024



The demand levels for the top 50 series across major streaming platforms remained similar to the previous quarter, with Netflix holding the top position, while Max, Prime Video and Disney+ compete closely for second place.

Among the four leading platforms, only Disney+, with all Walt Disney pictures properties, maintains a higher share of exclusive content in its top 50. In contrast, Netflix and Prime Video have a higher proportion of licensed shows in their respective top 50 rankings.

Among the platforms with a greater share of exclusive content, Disney+ stands out with titles spanning its diverse labels. In the second tier, Paramount+ is notable, with the top 50 shows being more heavily concentrated in non-exclusive content.

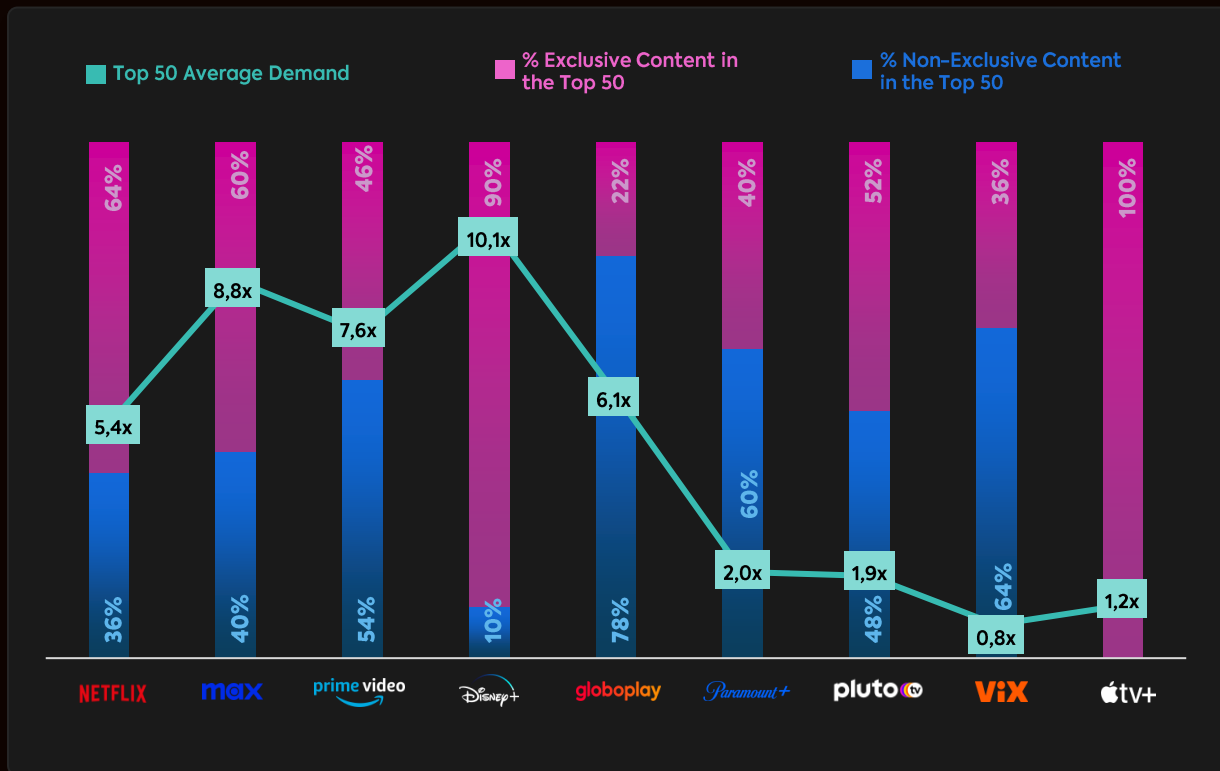
# In the film category, Disney+ takes the lead with the release of "Inside Out 2" on the platform

## Top 50 Movies by each Major Platform and their distribution in Latin America, Q3 2024

Following a period of theatrical exclusivity, "Inside Out 2" debuted on Disney+ at the end of the third quarter, boosting the platform's average demand in its top 50 films, which now holds the first position in the rankings. Due to its diverse labels, approximately 90% of Disney+'s top 50 films consist of exclusive content.

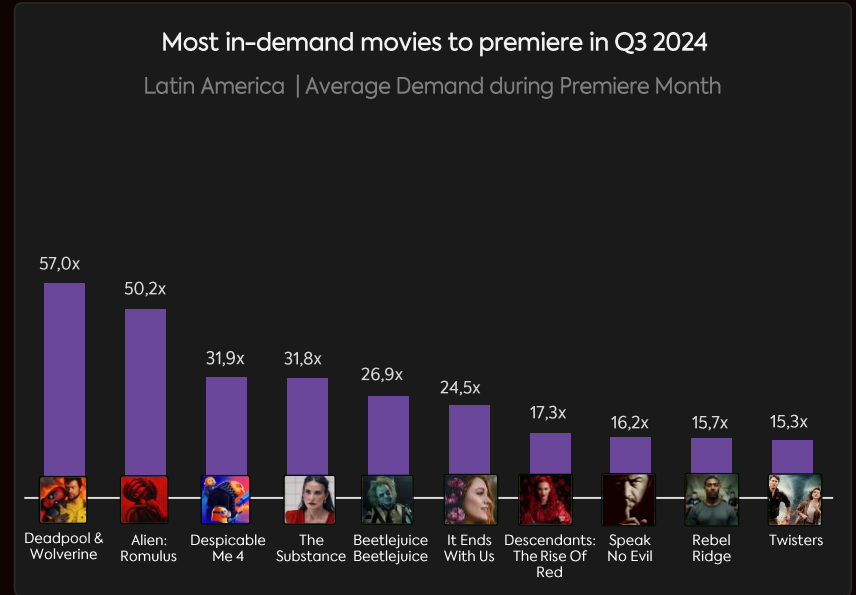
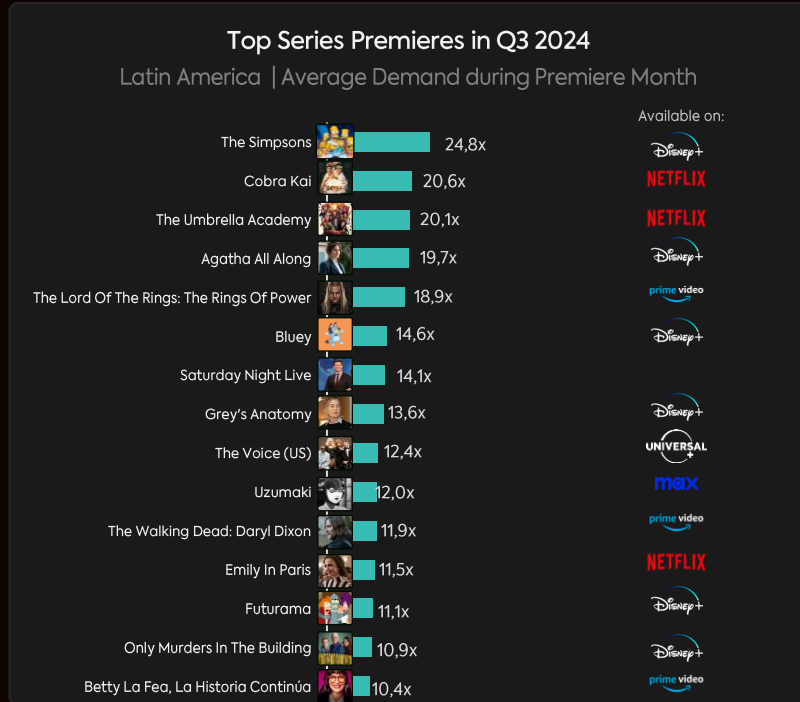
Max, with a higher percentage of exclusive titles, and Prime Video, with a greater share of non-exclusive content, complete the top three.

Netflix, which recently underwent restructuring in its film division and leads the series rankings, continues to show a lower average demand for films compared to its main global competitors, considering the platform's top 50 movies.





Considering the TV series that premiered a new season in the quarter, the highlights were related to returning shows, such as "The Simpsons" and "Cobra Kai". Disney+ stands out by securing 6 spots in the Top 15, marking its best position among the quarters analyzed in 2024. Additionally, the "Betty La Fea, La Historia Continúa" revival is the Latin title with the highest demand in the region.



Taking into account the most in-demanded movies that premiered in Q3 2024, titles from big franchises keep generating the highest demand, with "Deadpool & Wolverine" and "Alien: Romulus" leading the raking. Among the top 10 movies in LatAm, only 2 titles, "The Substance" and "Rebel Ridge" weren't based on a pre-existing IP. 4 out of the Top 5 movies were sequels from established franchises from different genres.

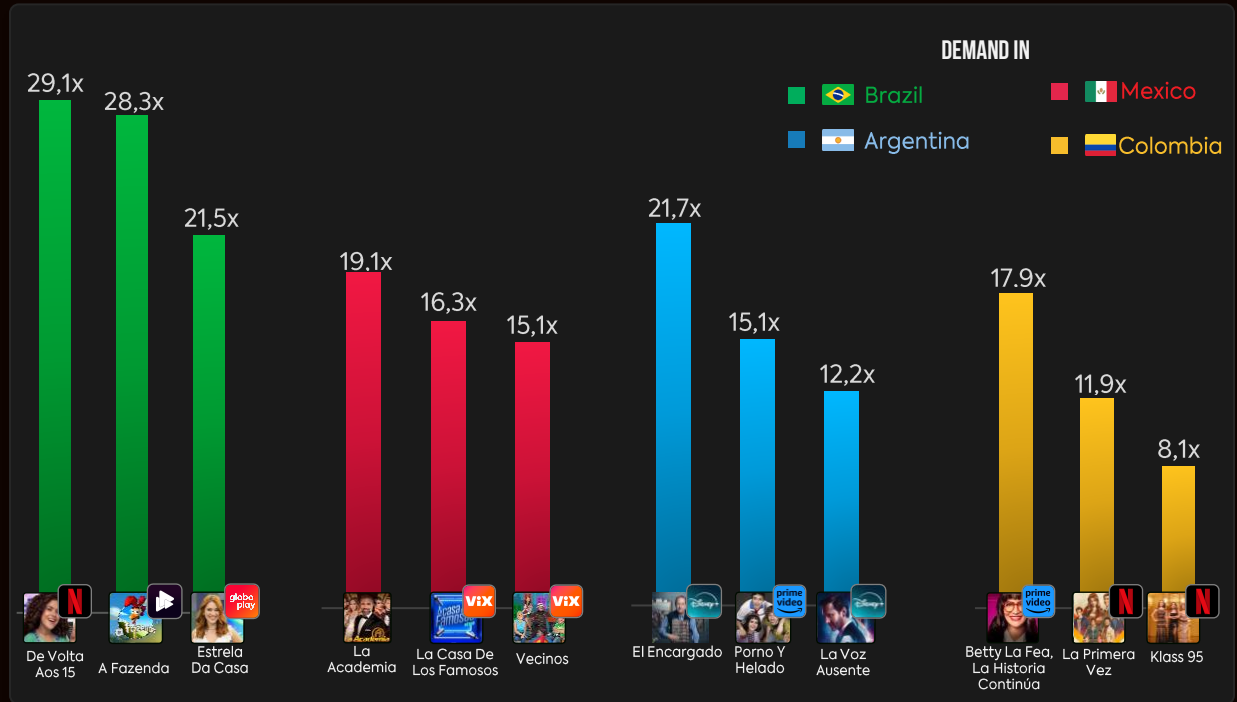
# Considering only Latin titles, all major markets have their top 3 local show generating an outstanding demand.

## Top Latin TV Shows Released in Q3 2024 during Premiere Month

During the first quarters of the year, Brazil and Mexico were the markets with the highest demand levels considering the performance of local titles in their respective home markets.

Although Brazil maintains its highlight in Q3 by generating the highest demand rate from a local show, the other markets also stand out by generating an impressive demand, with all Top 3 analyzed having an outstanding demand (8x+), a rate that only 3% of all titles tracked by Parrot achieve.

Regarding genres, dramedies and realities are the highlights. Vix stands out in Mexico with 2 titles at the top, while Disney+ stands out in Argentina and Netflix in Colombia.



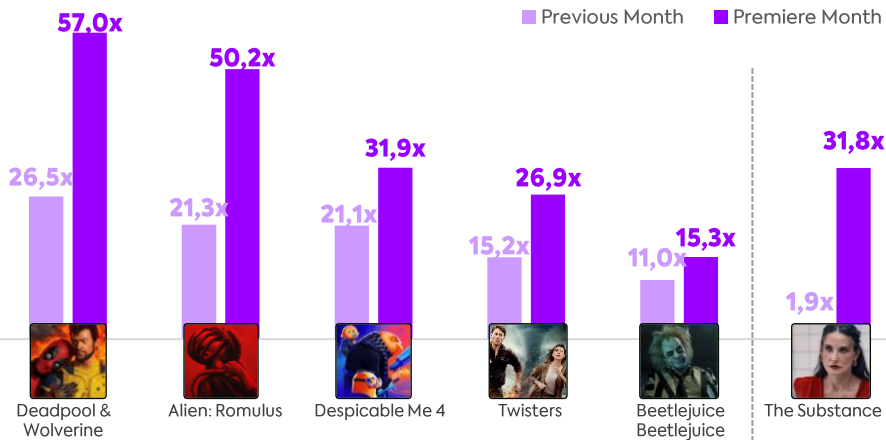
# Quarter highlight: Movie Franchises

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# The Importance of Pre-release demand for Movie Franchises

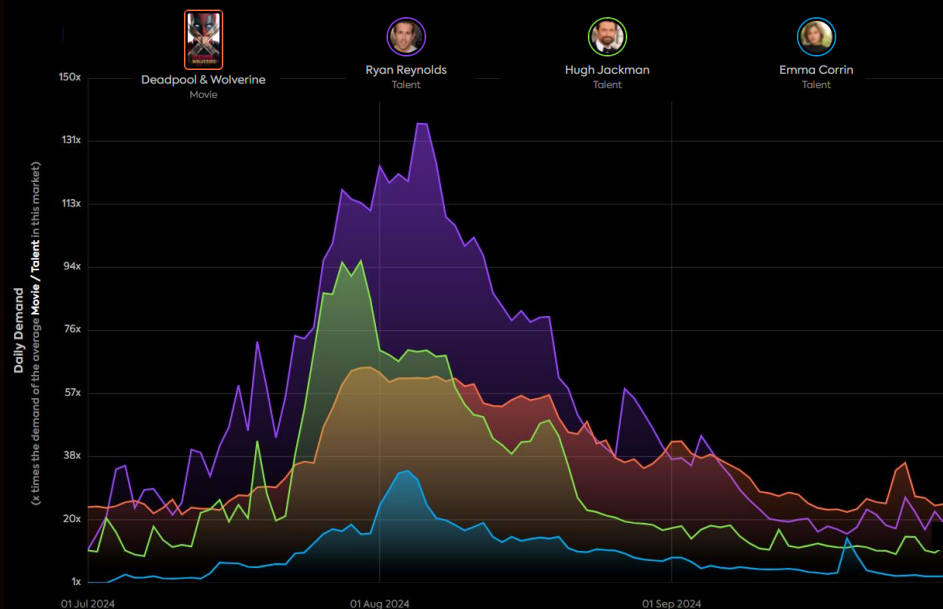
Top movies released in the quarter | Average Demand Premiere Month vs Previous Month



All the top 5 movies with the highest pre-release demand were part of a franchise and had a theatrical strategy. Having a pre-existing IP aligned with marketing strategies helped them generate an outstanding demand in the region a month before its launch. On the other hand, "The Substance" had the opposite trend. The movie came from an original story and reached the Top 5 titles considering the premiere month, having the highest increase due to the audience engagement after its launch.

## "Deadpool & Wolverine" + Talent Daily Demand in Q3 24

Time Series | Latin America



The talents of these franchises play an important role in increasing the demand. "Deadpool & Wolverine", the second-highest worldwide box office of 2024, only behind "Inside Out 2", had its main actors promoting the film in Latin America to support Walt Disney Pictures' marketing strategies. Comparing the movie with the actor's demand is possible to track how they increase together during the titles release reaching exceptional demand in the region.

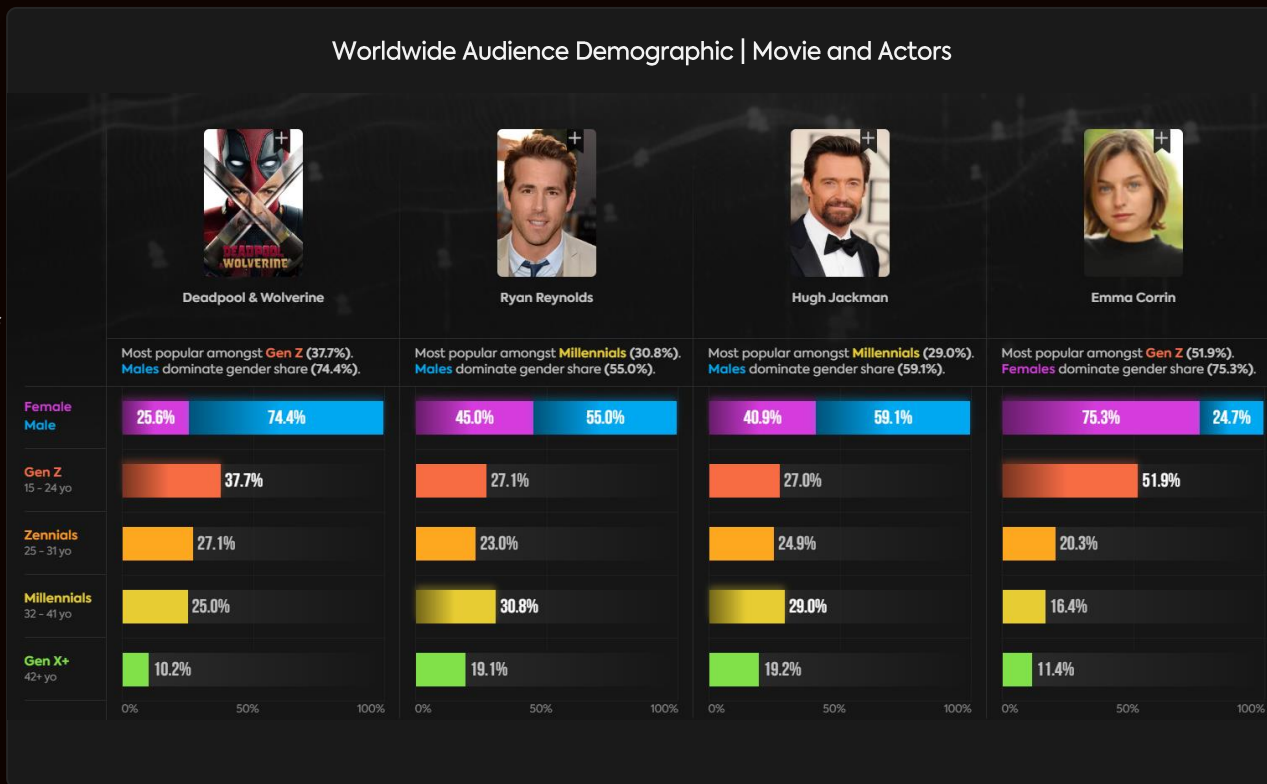
# Identifying an actor's strength to promote a title

Taking into account an actor's audience is important from casting to marketing decisions. Naturally, "Deadpool & Wolverine" has a higher breakdown among male and younger audiences, following the Marvel audience skew.

However, Ryan Reynolds and Hugh Jackman, two established Hollywood stars have a skew toward Millennials with also a solid presence of Gen X+, being an asset of promotion for these targets.

Emma Corrin, who had her first major role as Princess Diana on Netflix's "The Crown" in 2020, brings a female audience skew, supporting the movie's marketing strategy towards that target.

The same exercise can work to figure out which talent should promote a title in a specific region. With a higher demand in Latin America, Ryan Reynolds could have a better potential to engage with that audience.





# Market-specific content trends

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## 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.

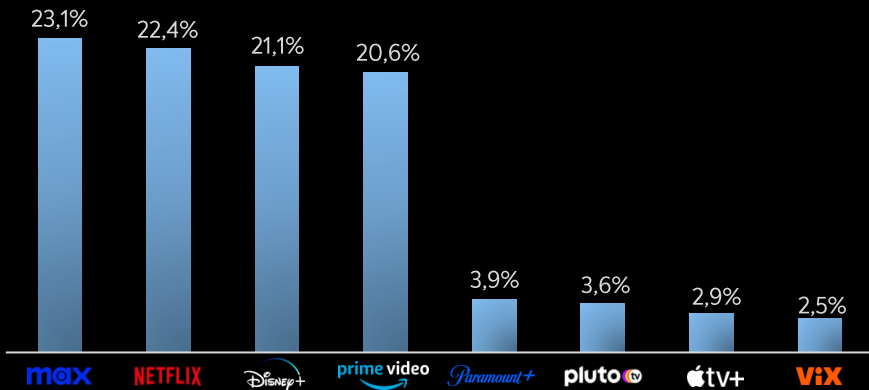
We also present our findings on a title level, identifying the top 3 TV series and Movies that premiered or had a new season in Q3 2024 with the highest demand in the market analyzed.





# Argentina Platform and Titles Preferences

Share of Total Demand for full platform in Q3 2024



- Max is still the leader in Argentina, having the second-highest demand share across the individual Latin markets.
- Apple TV+ once again surpassed Vix in demand share, achieving its highest rate across the region—an outcome not mirrored in other Spanish-speaking markets.

The 3 most in-demand titles that premiere/had a new season in Q3 2024



- Among the standout shows, Argentina's Top 2 mirrors the same pattern as the Latin America ranking, with "The Simpsons" and "Cobra Kai". However, the local show "El Encargado" stands out in the market, taking third place.
- For films, the top 3 titles in Argentina follow the same order as the Latin American average.

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



# Top 15 Latin Titles in Argentina

Average Demand in Q3 2024

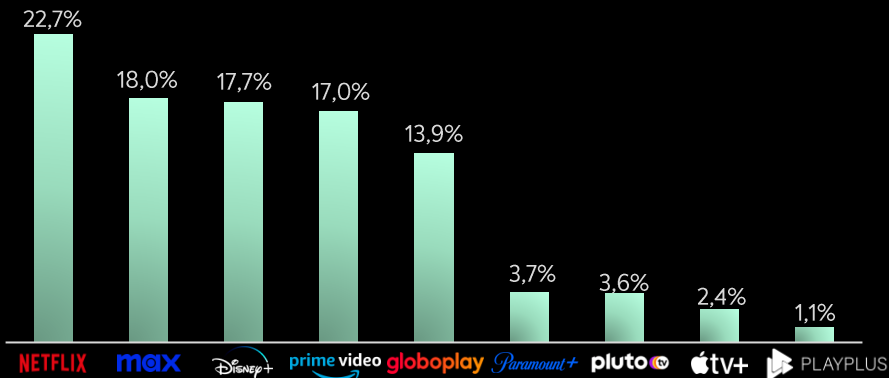
	SERIES NAME	TYPE OF CONTENT	ORIGINAL NETOWRK/COMPANY	GENRE	DIFFERENCE FROM AVERAGE TITLE (1X) IN Q3 2024	
1	<i>El Encargado</i>	show	Disney+	Comedy	20.2	
2	<i>Cuando acecha la maldad</i>	movie	Shudder	Horror	17.5	
3	<i>El Payaso Plim Plim</i>	show	Disney Junior	Children	17.0	
4	<i>La Granja De Zénon</i>	show	YouTube	Children	16.6	
5	<i>Bichikids</i>	show	YouTube	Children	16.4	
6	<i>Canciones Del Zoo</i>	show	YouTube	Children	16.2	
7	<i>La Rosa De Guadalupe</i>	show	Las Estrellas	Drama	13.5	
8	<i>Gran Hermano Argentina</i>	show	Telefe	Reality	13.2	
9	<i>El Reino Infantil</i>	show	YouTube	Children	12.6	
10	<i>Gran Hermano Chile</i>	show	Chilevisión	Reality	11.7	
11	<i>Como Dice El Dicho</i>	show	Las Estrellas	Drama	11.5	
12	<i>La Voz Ausente</i>	show	Disney+	Drama	10.4	
13	<i>La Extorsión</i>	movie	Warner Bros. Pictures	Crime	9.2	
14	<i>Nahir</i>	movie	Amazon Prime video	Crime	8.9	
15	<i>Puan</i>	show	Amazon Prime video	Drama	8.9	

Note: Considering only shows that had a premiere/new season in the last 12 months. Demand in Q3 2024. Excluding News shows.



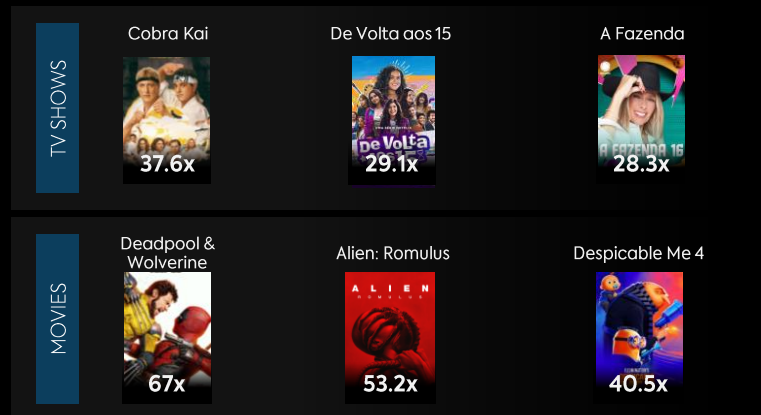
# Brazil Platform and Titles Preferences

Share of Total Demand for full platform in Q3 2024



- Netflix has Brazil with the second-highest demand share rate across the individual LatAm markets, but with the highest competitive advantage compared to the second platform.
- Globoplay, a Brazilian streaming platform, maintains its rate compared to the last quarter, still behind the major global platforms in the market.

The 3 most in-demand titles that premiere/had a new season in Q3 2024



- In Brazil, "Cobra Kai" holds the top position, while two local titles complete the Top 3. Brazil is the only market with more than one local title among the quarter's highlights.
- Despite Brazil having the same Top 3, in the same order, as the Latin American average, "Deadpool & Wolverine" holds a stronger competitive advantage over second place in the market.

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



# Top 15 Latin Titles in Brazil

Average Demand in Q3 2024

	SERIES NAME	TYPE OF CONTENT	ORIGINAL NETOWRK/COMPANY	GENRE	DIFFERENCE FROM AVERAGE TITLE (1X) IN Q3 2024	
1	<i>Renascer</i>	show	TV Globo	Drama	29.0	
2	<i>Sintonia</i>	show	Netflix	Drama	24.3	
3	<i>A Fazenda</i>	show	Record TV	Reality	22.8	
4	<i>Programa Silvio Santos</i>	show	SBT	Variety	19.6	
5	<i>MasterChef Brasil</i>	show	Band	Reality	19.6	
6	<i>De Férias Com O Ex</i>	show	MTV	Reality	19.5	
7	<i>Galinha Pintadinha</i>	show	YouTube	Children	19.4	
8	<i>Porta Dos Fundos</i>	show	YouTube	Comedy	18.9	
9	<i>Programa Do Ratinho</i>	show	SBT	Variety	18.6	
10	<i>Impuros</i>	show	Disney+	Drama	18.4	
11	<i>Big Brother Brasil</i>	show	TV Globo	Reality	18.4	
12	<i>Jogo Aberto</i>	show	Band	Variety	17.8	
13	<i>Domingo Legal</i>	show	SBT	Variety	17.6	
14	<i>A Praça é Nossa</i>	show	SBT	Comedy	17.4	
15	<i>Os Donos Da Bola</i>	show	Band	Variety	17.0	

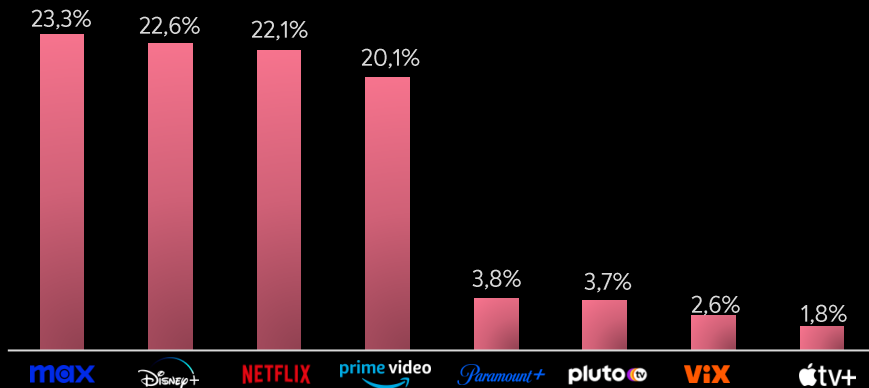
Note: Considering only shows that had a premiere/new season in the last 12 months. Demand in Q3 2024. Excluding News shows.





# Chile Platform and Titles Preferences

Share of Total Demand for full platform in Q3 2024



- Chile is the most competitive market among the top three platforms, with only a 1.2 percentage point difference separating first and third place.
- Netflix doesn't reach the Top 2 only in Chile, while Disney+ was able to secure the second position in the market, having best performance across the individual Latin markets analyzed.

The 3 most in-demand titles that premiere/had a new season in Q3 2024



- In Chile, two fantasy titles, "Lord of the Rings" and "Agatha All Along", from well-established universes, make it into the Top 3, with the Disney+ show reaching the top 3 only in the Chilean market.
- Among films, the horror movie "The Substance" stands out, reaching the Top 3 and ranking higher than the Latin American average, where it takes fourth place.

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



# Top 15 Latin Titles in Chile

Average Demand in Q3 2024

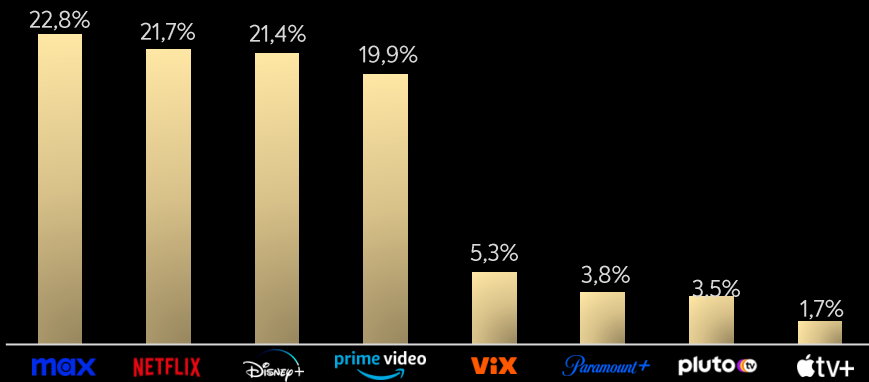
	SERIES NAME	TYPE OF CONTENT	ORIGINAL NETOWRK/COMPANY	GENRE	DIFFERENCE FROM AVERAGE TITLE (1X) IN Q3 2024
1	<i>Gran Hermano Chile</i>	show	Chilevisión	Reality	28.7
2	<i>Carmen Gloria A Tu Servicio</i>	show	Televisión Nacional de Chile	Variety	13.8
3	<i>El Payaso Plim Plim</i>	show	Disney Junior	Children	13.6
4	<i>Bichikids</i>	show	YouTube	Children	12.9
5	<i>La Rosa De Guadalupe</i>	show	Las Estrellas	Drama	12.7
6	<i>Canciones Del Zoo</i>	show	YouTube	Children	12.5
7	<i>La Granja De Zénon</i>	show	YouTube	Children	12.4
8	<i>Como Dice El Dicho</i>	show	Las Estrellas	Drama	10.1
9	<i>El Reino Infantil</i>	show	YouTube	Children	9.5
10	<i>Bob Zoom</i>	show	YouTube	Children	8.3
11	<i>Betty La Fea, La Historia Continúa</i>	show	Amazon Prime Video	Comedy	6.5
12	<i>Galinha Pintadinha</i>	show	YouTube	Children	5.1
13	<i>Gran Hermano Argentina</i>	show	Telefe	Reality	4.3
14	<i>El Conde</i>	movie	Netflix	Fantasy	4.0
15	<i>La Divina Comida</i>	show	Chilevisión	Reality	3.6

Note: Considering only shows that had a premiere/new season in the last 12 months. Demand in Q3 2024. Excluding News shows.



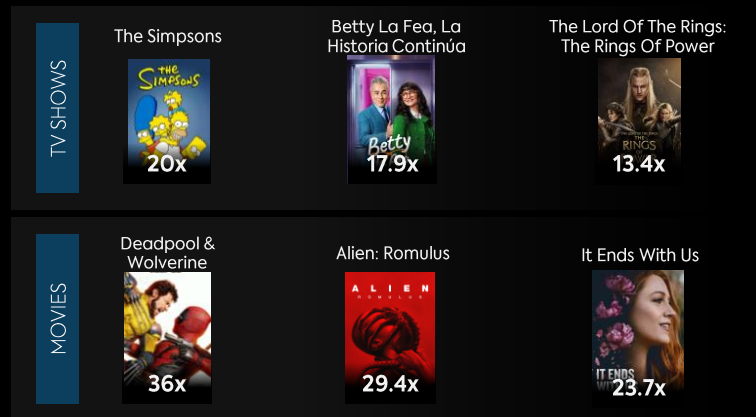
# Colombia Platform and Titles Preferences

### Share of Total Demand for full platform in Q3 2024



- Differently from the past quarters, Netflix decrease one position in Colombia, with Max assuming the leadership.
- Additionally, Vix stands out in the Colombian market by reaching its highest demand share rate across the Latin markets analyzed.

### The 3 most in-demand titles that premiere/had a new season in Q3 2024



- Following the Latin American average, “The Simpsons” also leads the series ranking in the Colombian market. “Betty La Fea, La Historia Continúa”, the only Latin show in the region’s Top 15, secures the second position in its local market.
- In films, the romantic drama “It Ends With Us” stands out by reaching third place in the market, three positions higher than in the Latin American average.

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





# Top 15 Latin Titles in Colombia

Average Demand in Q3 2024

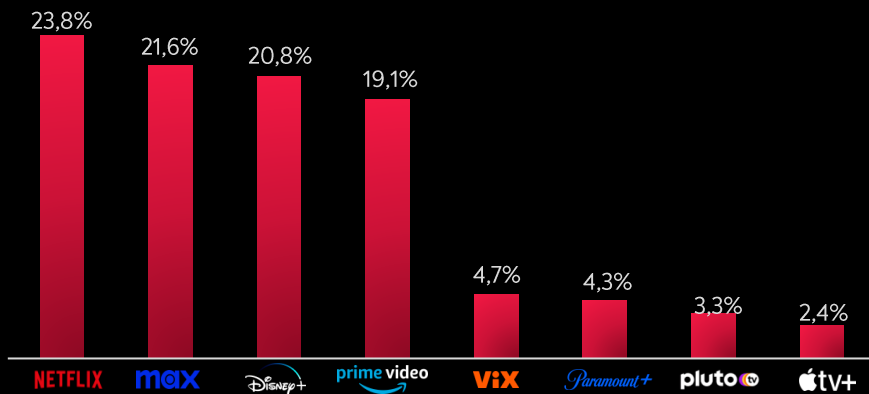
	SERIES NAME	TYPE OF CONTENT	ORIGINAL NETOWRK/COMPANY	GENRE	DIFFERENCE FROM AVERAGE TITLE (1X) IN Q3 2024	
1	<i>MasterChef Celebrity Colombia</i>	show	RCN	Reality	15.8	
2	<i>Betty La Fea, La História Continúa</i>	show	Amazon Prime Video	Comedy	14.6	
3	<i>La Rosa De Guadalupe</i>	show	Las Estrellas	Drama	14.5	
4	<i>El Payaso Plim Plim</i>	show	Disney Junior	Children	13.5	
5	<i>La Granja De Zénon</i>	show	YouTube	Children	13.2	
6	<i>La Voz Kids Colombia</i>	show	Caracol	Reality	12.2	
7	<i>Canciones Del Zoo</i>	show	YouTube	Children	12.0	
8	<i>Bichikids</i>	show	YouTube	Children	11.9	
9	<i>Como Dice El Dicho</i>	show	Las Estrellas	Drama	11.8	
10	<i>El Reino Infantil</i>	show	YouTube	Children	9.7	
11	<i>Galinha Pintadinha</i>	show	YouTube	Children	9.1	
12	<i>El Rastro</i>	show	Caracol	Documentary	7.7	
13	<i>La Primera Vez</i>	show	Netflix	Comedy	7.6	
14	<i>Klass 95</i>	show	Caracol TV	Drama	6.6	
15	<i>Vivir de Amor</i>	show	Las Estrellas	Drama	6.5	

Note: Considering only shows that had a premiere/new season in the last 12 months. Demand in Q3 2024. Excluding News shows.



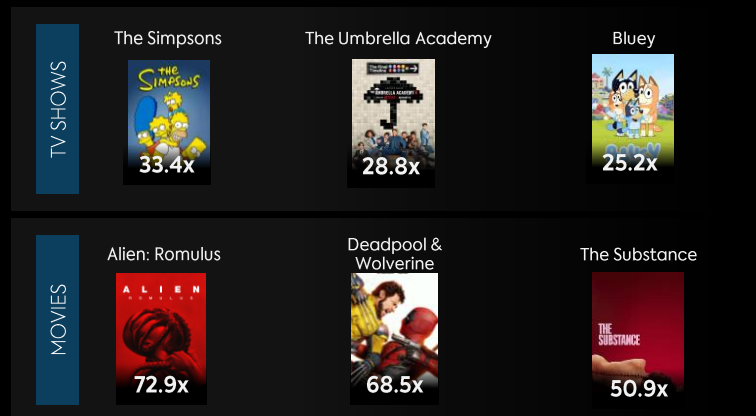
# Mexico Platform and Titles Preferences

Share of Total Demand for full platform in Q3 2024



- Netflix maintains its top position in Mexico, generating its highest demand share rate across LatAm.
- Vix is more competitive in Mexico than in the region, reaching its second-highest demand share rate in the market and surpassing Paramount+ performance.

The 3 most in-demand titles that premiere/had a new season in Q3 2024



- In Mexico, "The Umbrella Academy" and "Bluey" reached the Top 3, with demand exceeding the region's average. This is the only market where these titles managed to reach the top of the ranking.
- Unlike other markets, "Alien: Romulus" leads the film ranking in Mexico, while "Deadpool & Wolverine" takes second place. "The Substance" also stands out by reaching the Top 3 in Mexico, what didn't happen in the regions ranking.

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





# Top 15 Latin Titles in Mexico

Average Demand in Q3 2024

	SERIES NAME	TYPE OF CONTENT	ORIGINAL NETOWRK/COMPANY	GENRE	DIFFERENCE FROM AVERAGE TITLE (1X) IN Q3 2024	
1	<i>La Rosa De Guadalupe</i>	show	Las Estrellas	Drama	20.5	
2	<i>Como Dice El Dicho</i>	show	Las Estrellas	Drama	16.5	
3	<i>Ventaneando</i>	show	TV Azteca	Variety	16.2	
4	<i>La Academia</i>	show	TV Azteca	Reality	16.2	
5	<i>Vecinos Mexico</i>	show	Las Estrellas	Comedy	14.6	
6	<i>Shark Tank Mexico</i>	show	Sony Channel	Reality	14.5	
7	<i>La Isla: El Reality</i>	show	Azteca7	Reality	14.3	
8	<i>Hoy</i>	show	Las Estrellas	Variety	13.9	
9	<i>El Payaso Plim Plim</i>	show	YouTube	Children	13.8	
10	<i>La Casa De Los Famosos Mexico</i>	show	Las Estrellas	Reality	13.7	
11	<i>Radical</i>	movie	Ascot Entertainment	Drama	13.6	
12	<i>La Granja De Zénon</i>	show	YouTube	Children	13.5	
13	<i>Vivir De Amor</i>	show	Las Estrellas	Drama	13.3	
14	<i>Bichikids</i>	show	YouTube	Children	12.9	
15	<i>Canciones Del Zoo</i>	show	YouTube	Children	12.9	

Note: Considering only shows that had a premiere/new season in the last 12 months. Demand in Q3 2024. Excluding News shows.



# Appendix

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Gain an understanding of Parrot Analytics' global demand measurement capabilities

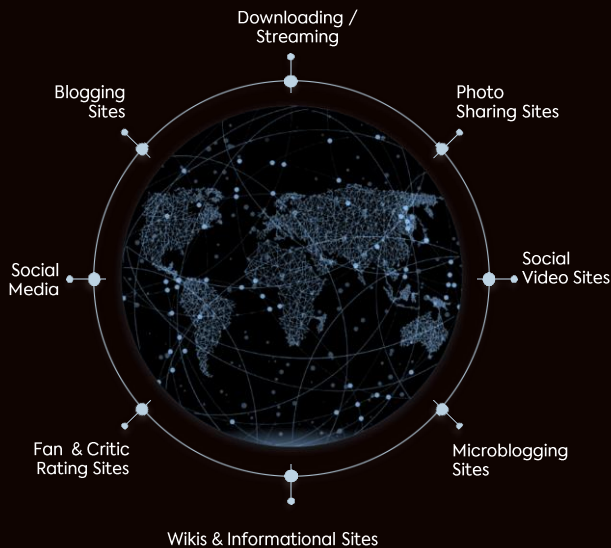


# The Standard for Global Audience Demand Measurement

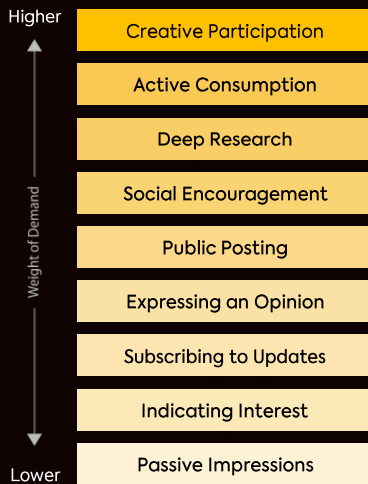
We capture the world's largest audience behavior datasets

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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