



# Breaking the Glass Lens:

The Rising Demand for Female Crafted Stories

March 14, 2024



WORLDWIDE AUDIOVISUAL  
WOMEN'S ASSOCIATION



Banijay  
Elle

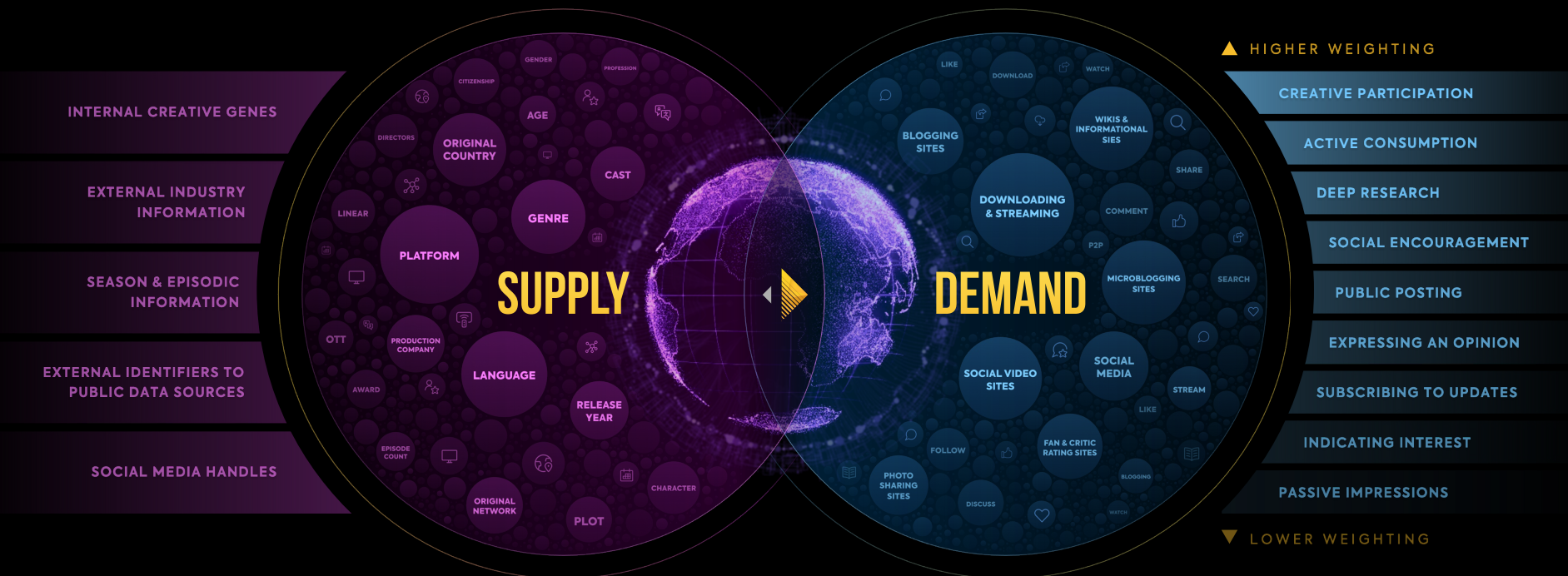
CAPTURING

CONTENT SUPPLY

AUDIENCE DEMAND

100M+ METADATA TAGS  
2K+ DISTRIBUTION PLATFORMS  
1M+ TITLES & 1M+ TALENT

BEHAVIORAL DATA FROM  
2B+ CONSUMERS



▲ HIGHER WEIGHTING

- CREATIVE PARTICIPATION
- ACTIVE CONSUMPTION
- DEEP RESEARCH
- SOCIAL ENCOURAGEMENT
- PUBLIC POSTING
- EXPRESSING AN OPINION
- SUBSCRIBING TO UPDATES
- INDICATING INTEREST

▼ LOWER WEIGHTING

The industry's most advanced

CONTENT TAXONOMY SYSTEM

The world's only global audience

DEMAND MEASUREMENT PLATFORM

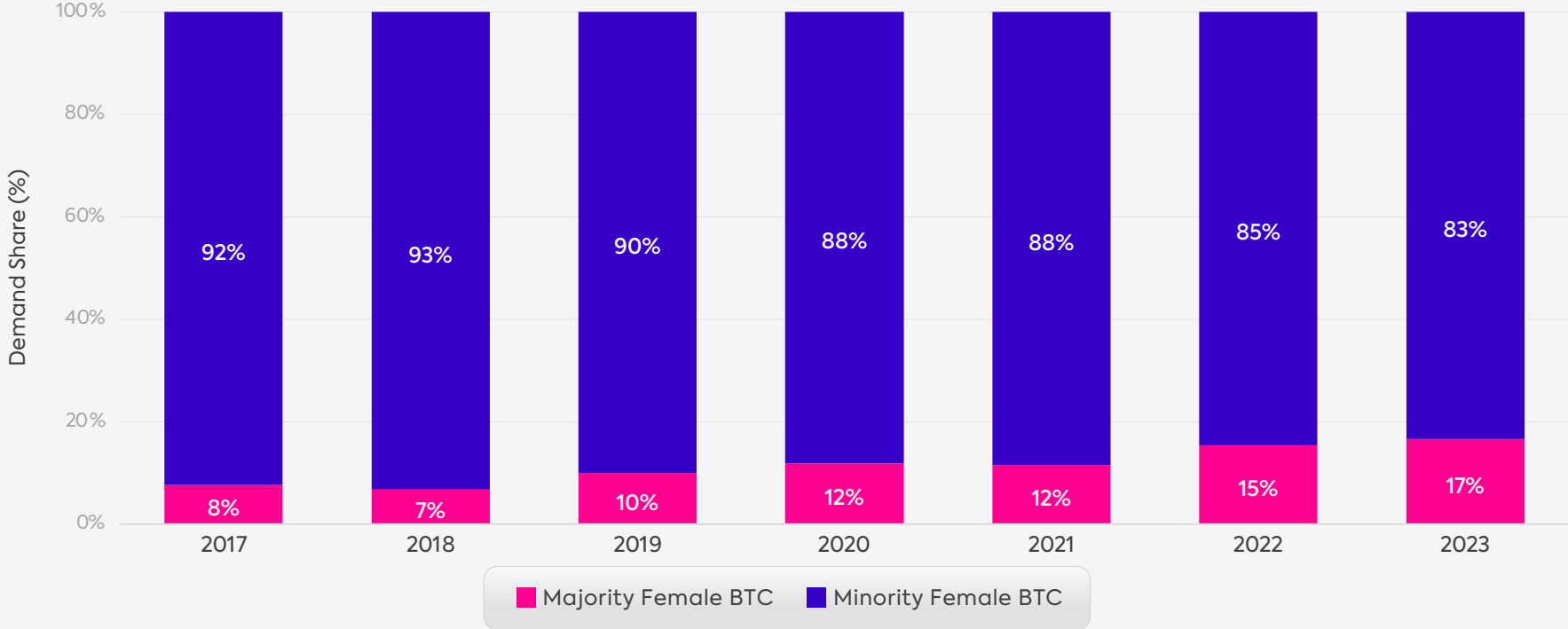
# Methodology

The following study leverages Parrot Analytics' proprietary Supply and Demand systems to analyze trends in new TV productions released globally between 2017 -2023 with women in behind the camera roles, i.e., directors, producers, writers, editors, to understand where there has been growth for women in traditionally male-dominated roles and where there is opportunity for breakthrough.

- Demand reflects the average global demand over the first 30 days of release and is reflected as a share (%) or a multiplier (x times the average title during that time period).
- Supply reflects the total number of productions by:
  - **Majority Female BTC Productions:** Productions where  $\geq 50\%$  of behind the camera (BTC) talent in director, producer, writer, or editor roles self-reported as female.
  - **Minority Female BTC Productions:** Productions where  $< 50\%$  of behind the camera (BTC) talent in director, producer, writer, or editor roles self-reported as female.
    - Further segmentations include year of production, scripted vs. unscripted series, behind-the-camera role, genre, region of origin, and market of origin.

# The demand share of productions with majority women behind the screen has more than doubled since 2017

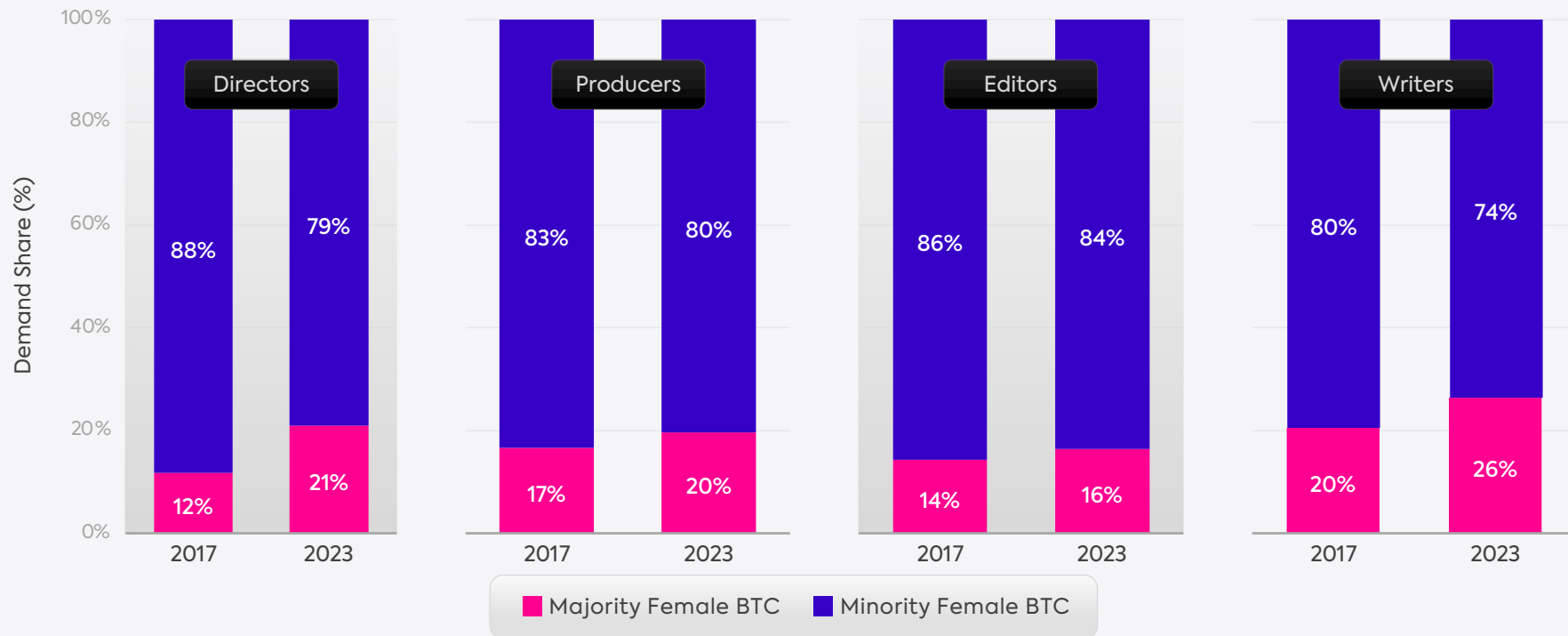
Demand Share of New Global Series by Year (30 Days Post-Release, 2017 – 2023)





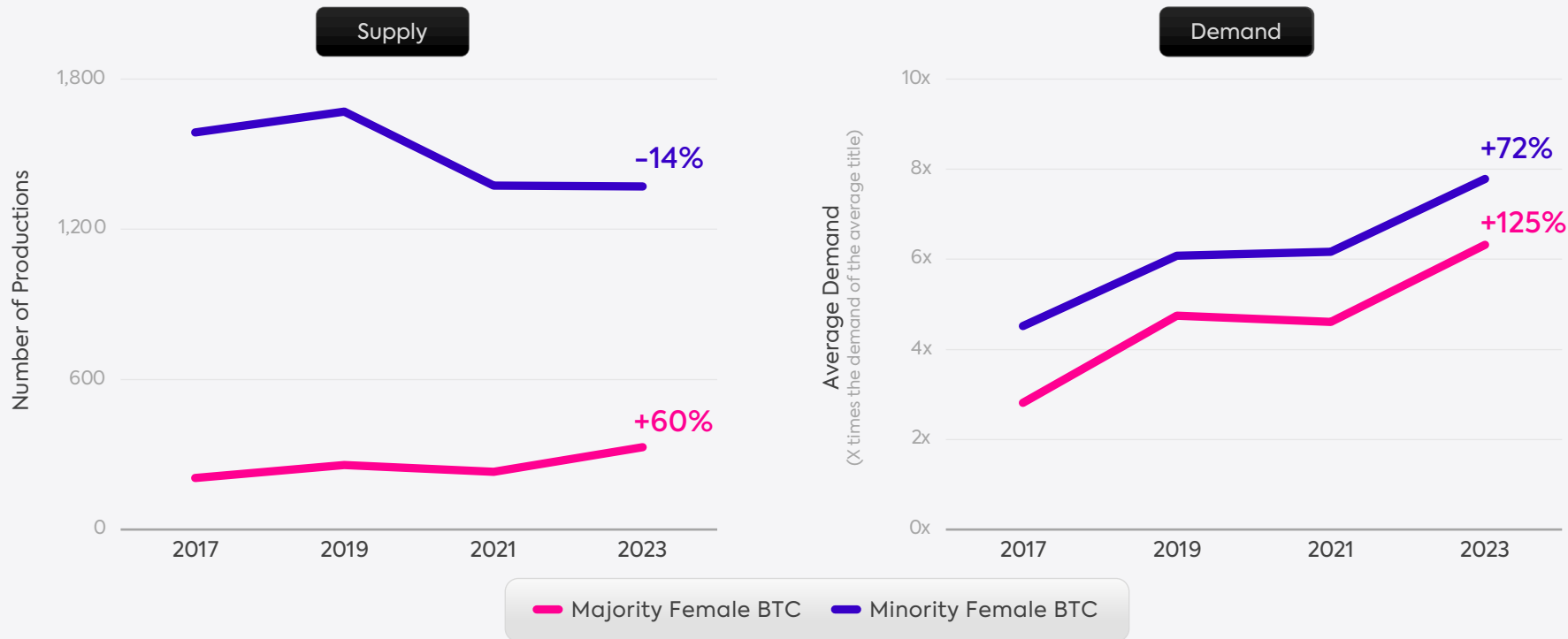
# Female writers maintain the largest share of demand, but directors are catching up with a 1.75x lift between 2017 and 2023

Demand Share of New Global Series by BTC Role and Year (30 Days Post-Release, 2017 vs. 2023)



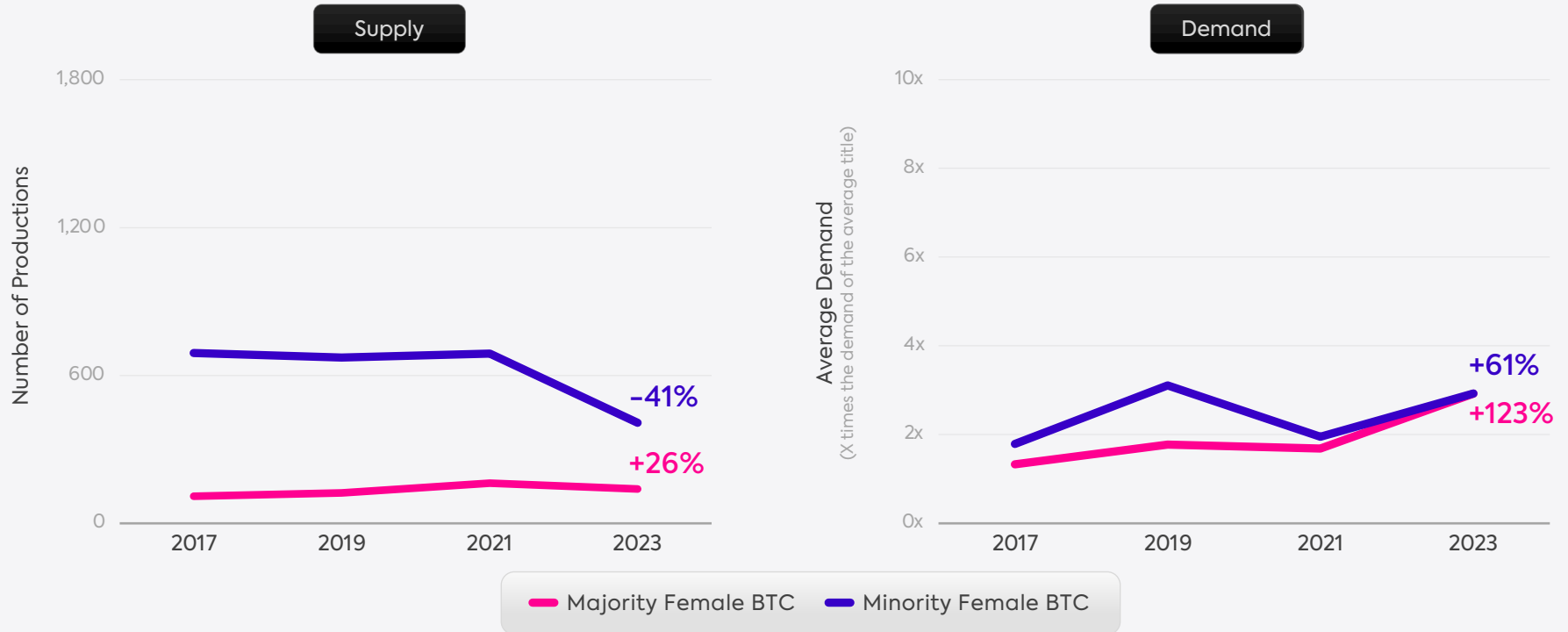
# Global supply and demand for new series with majority female representation behind the screen are on the rise, up 60% and 125% respectively since 2017

Global Supply & Demand of New Global **Scripted** Series by Year (30 Days Post-Release, 2017-2023)



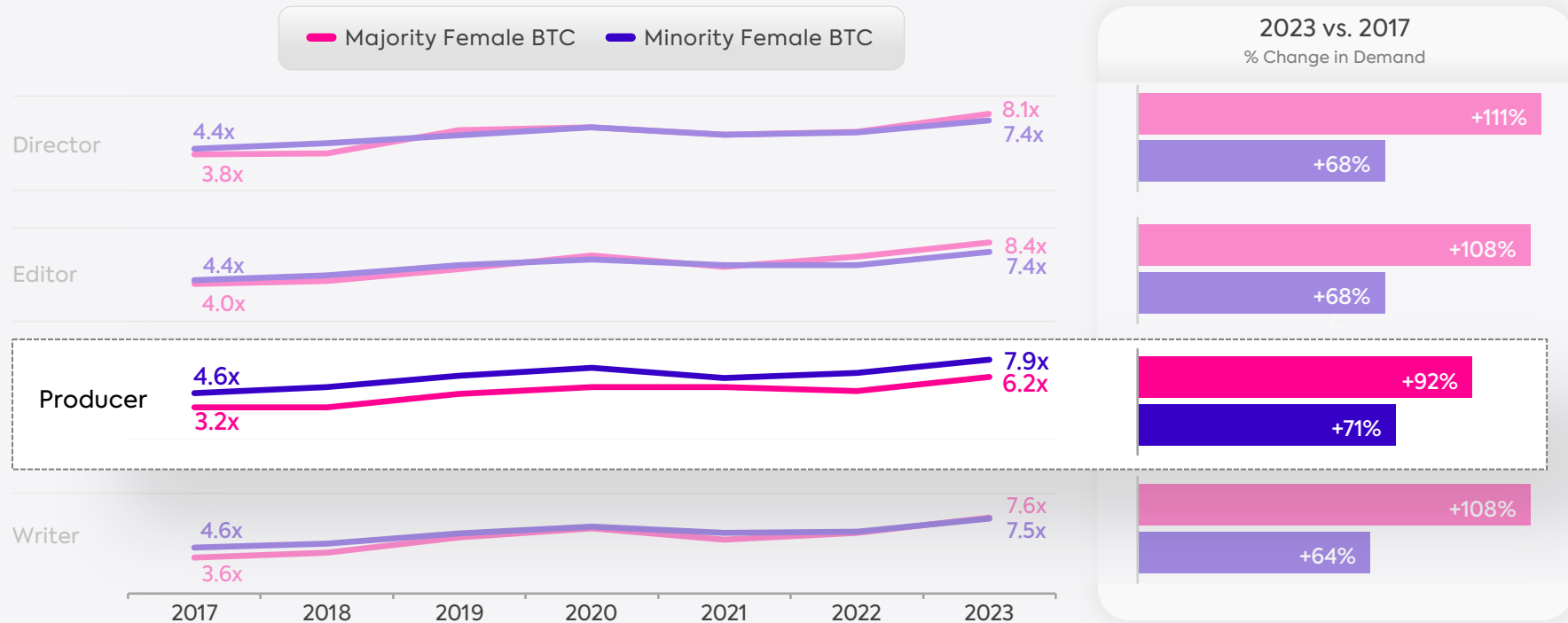
# Global demand for unscripted series with majority female representation BTC is up 123% on average since 2017, closing the gap with minority female productions in 2023

Global Supply & Demand of New Global **Unscripted** Series by Year (30 Days Post-Release, 2017-2023)



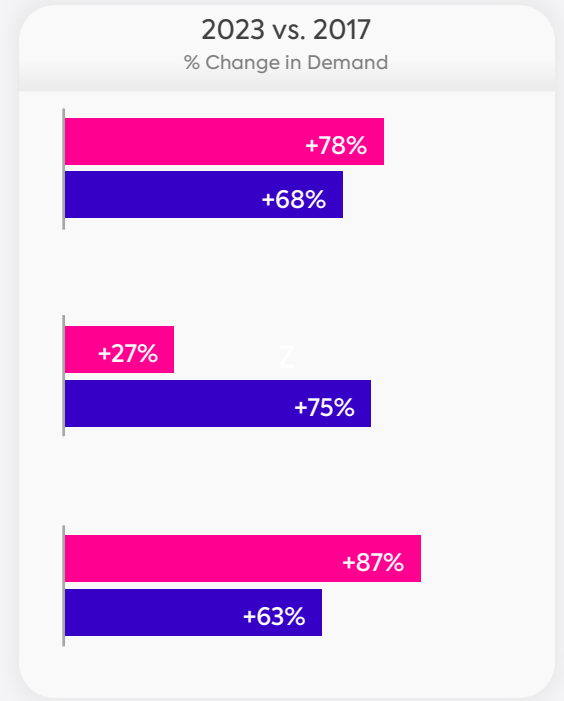
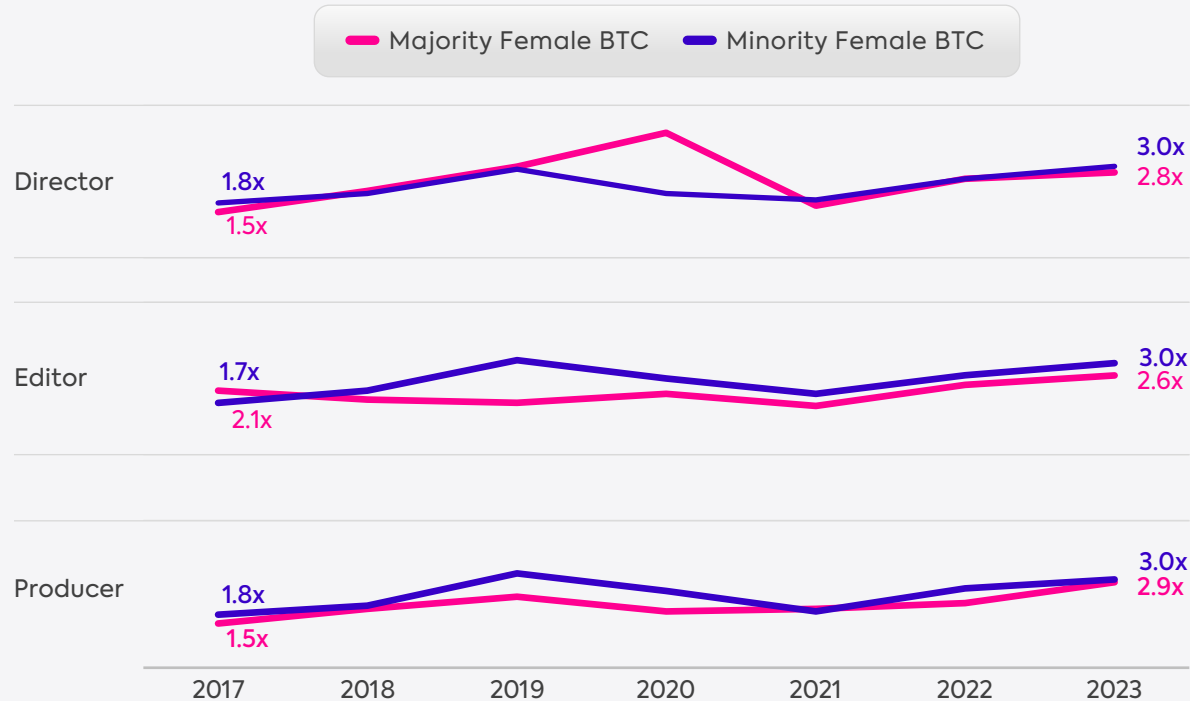
# The demand growth rate for scripted series with majority female BTC representation has outpaced minority female productions across roles, including producers, which has seen a narrowing in the average demand gap between 2017 and 2023

Average Demand of New Global **Scripted** Series by BTC Role and Year (30 Days Post-Release, 2017-2023)



# Conversely, unscripted series with majority female BTC representation saw the most growth and 2023 demand in the producer role and the least growth in the editor role

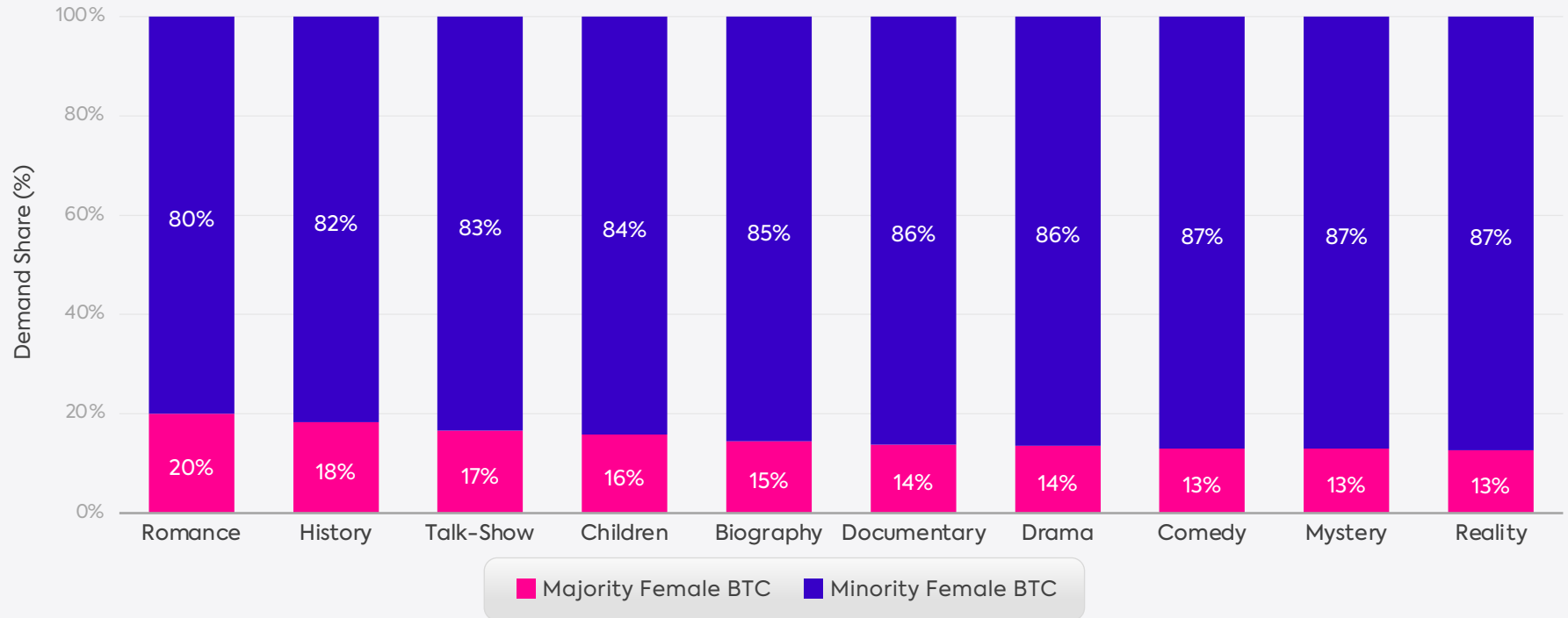
Average Demand of New Global **Unscripted** Series by BTC Role and Year (30 Days Post-Release, 2017-2023)





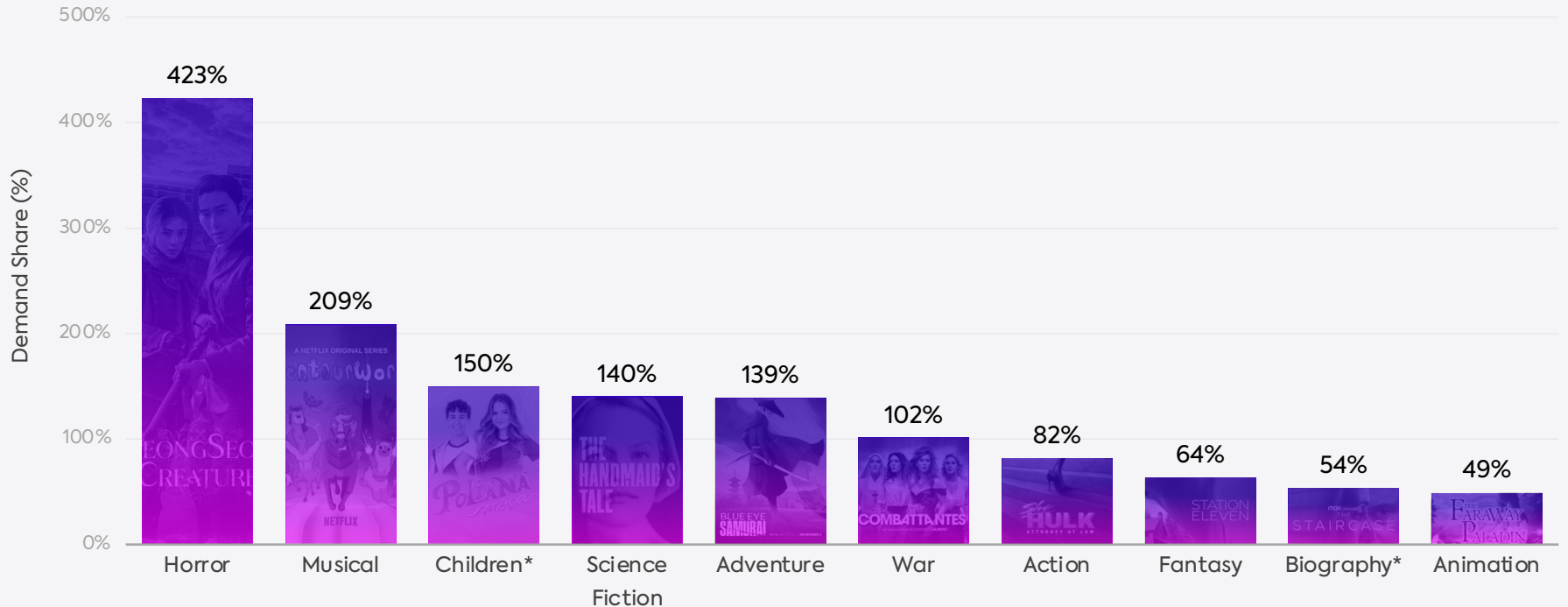
# The top 10 most in-demand TV genres with majority female behind-the-camera representation span both scripted and unscripted content, including traditionally female-skewing genres like Romance and Talk Shows

Demand Share of Top 10 Genres of New Global Series with Majority Female BTC (30 Days Post-Release, 2017-2023)



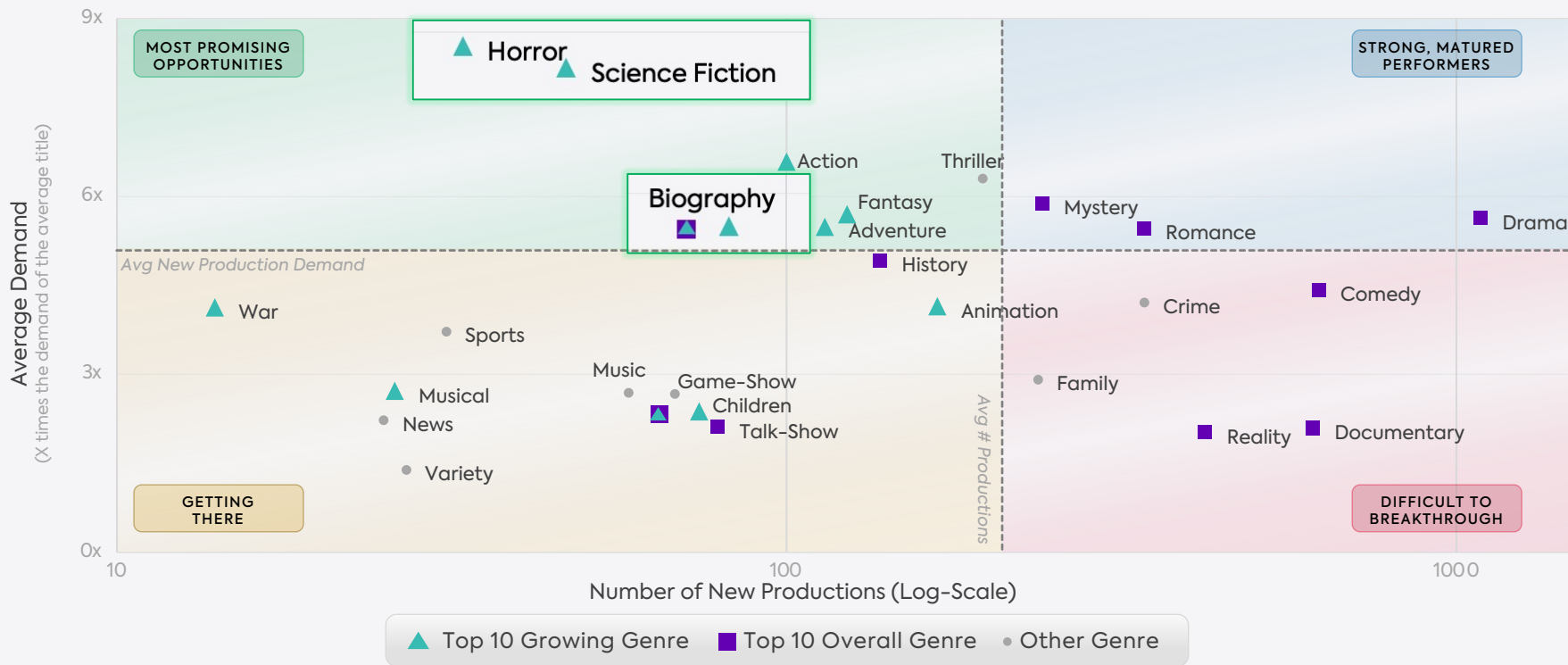
# The genres with the greatest growth in demand among majority female BTC representation span a variety of audience tastes, including traditionally male-skewing genres such as Science Fiction, War, and Action

Top 10 Genres of New Global Series with Majority Female BTC Ranked by YoY Change in Demand (30 Days Post-Release, 2017-2023)



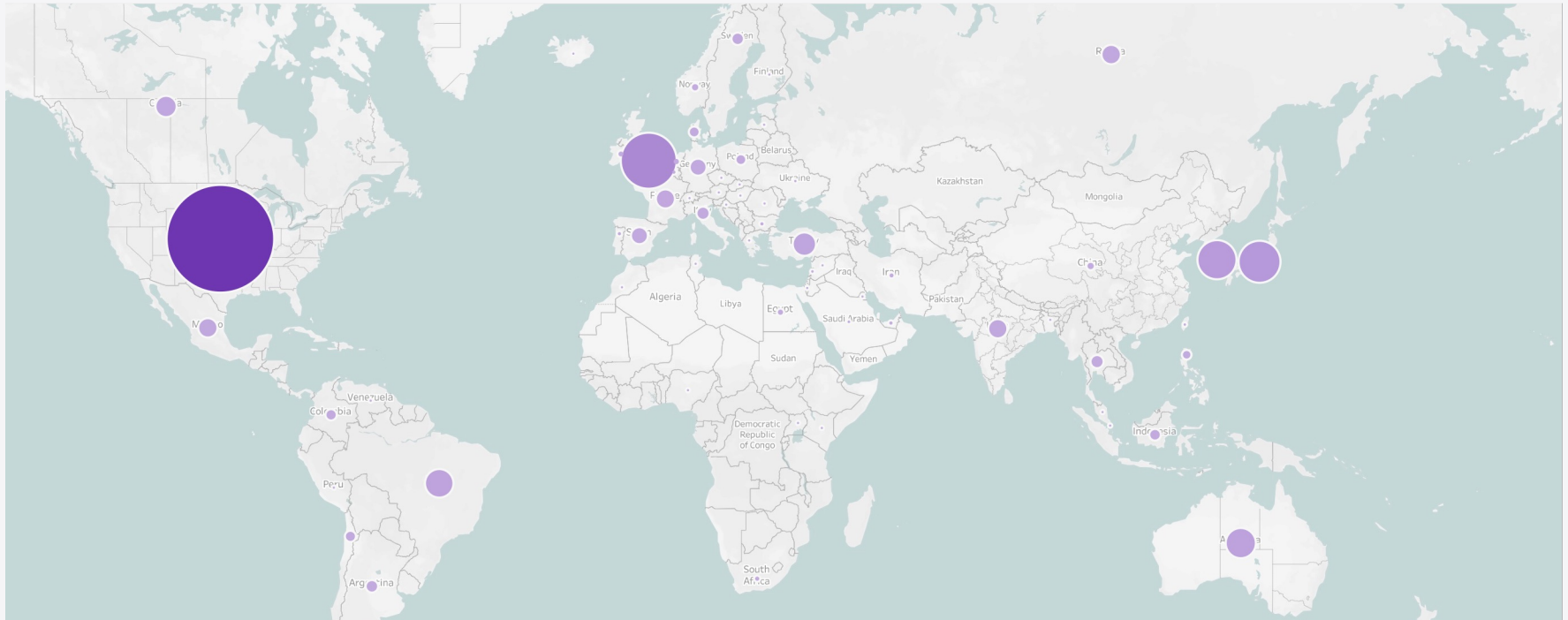
# In addition to Biography and History, Horror and Science Fiction offer promising opportunities for breakthrough

Genre Supply vs. Demand of New Global Series with Majority Female BTC (30 Days Post-Release, 2017-2023)



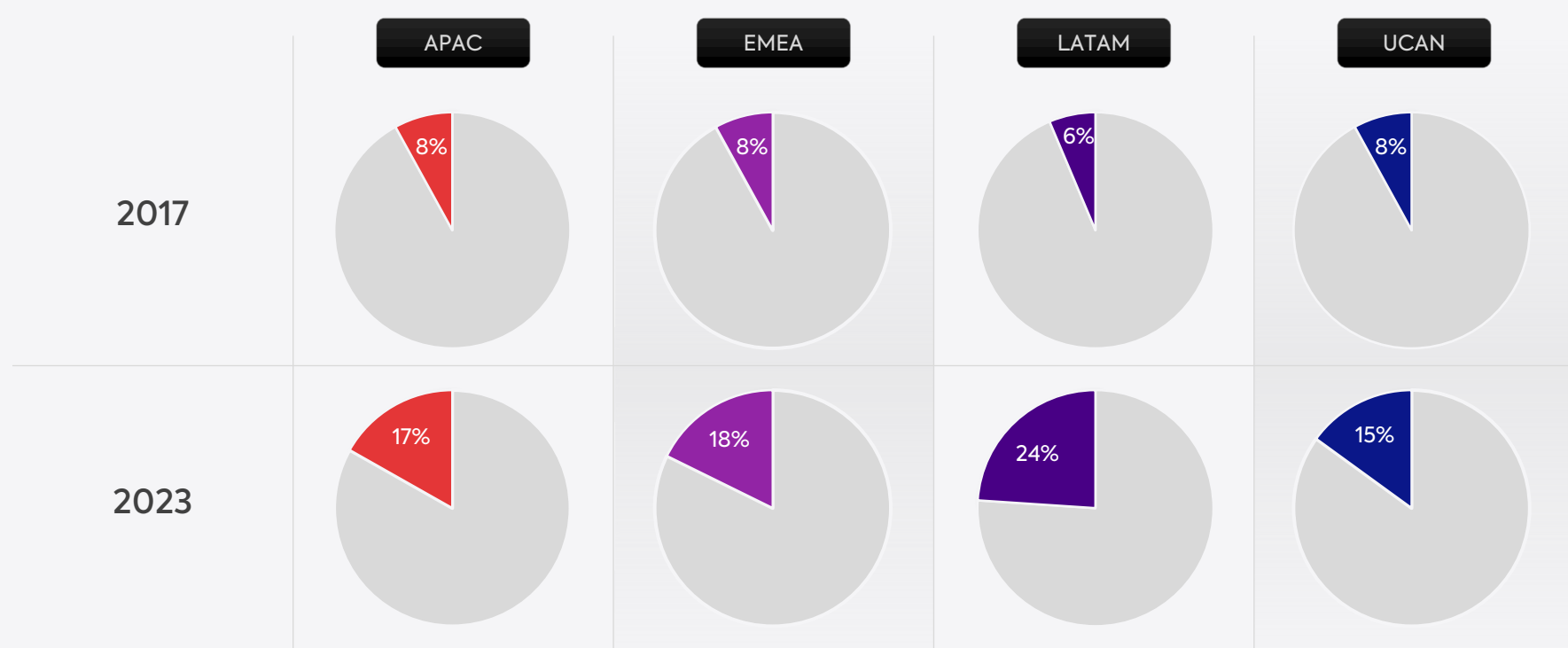
# The United States, United Kingdom, Japan, South Korea, and Australia are the top 5 markets with the largest share of demand generated by new series with majority female BTC representation between 2017-2023

Global Demand Distribution of New Series with Majority Female BTC by Home Market (30 Days Post-Release, 2017-2023)



# Regionally, Latin America has seen the greatest growth in demand for new series produced by majority women behind the camera

Demand Share of New Series with Majority Female BTC Representation By Region and Year (30 Days Post-Release, 2017-2023)





# Top 100 most in-demand series with majority female BTC representation from 2017

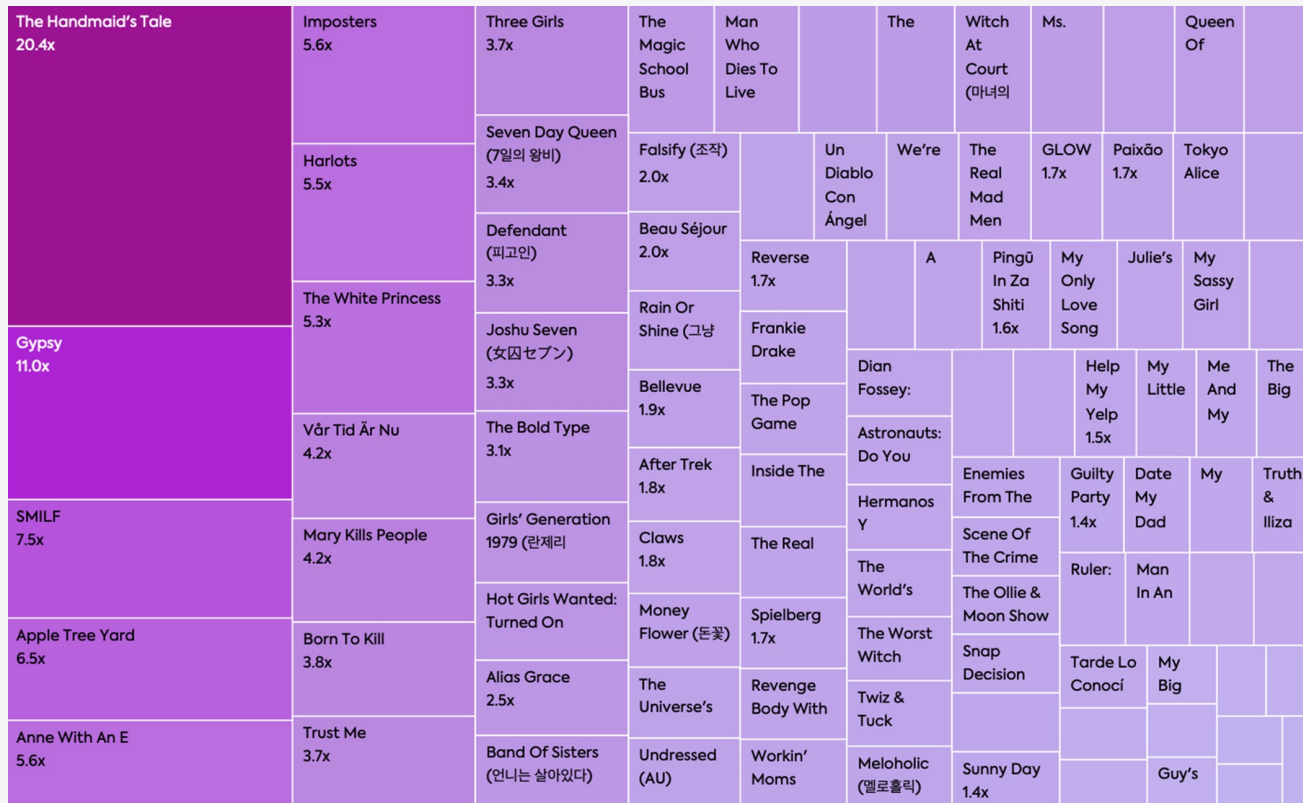
Average Title Demand

# 2.3x

Audience composition

**33%**  
MALE  
♂

**67%**  
FEMALE  
♀



# Top 100 most in-demand series with majority female BTC representation from 2023

Average Title Demand

# 9.5x

(+313%)

Audience composition

# 42%

MALE



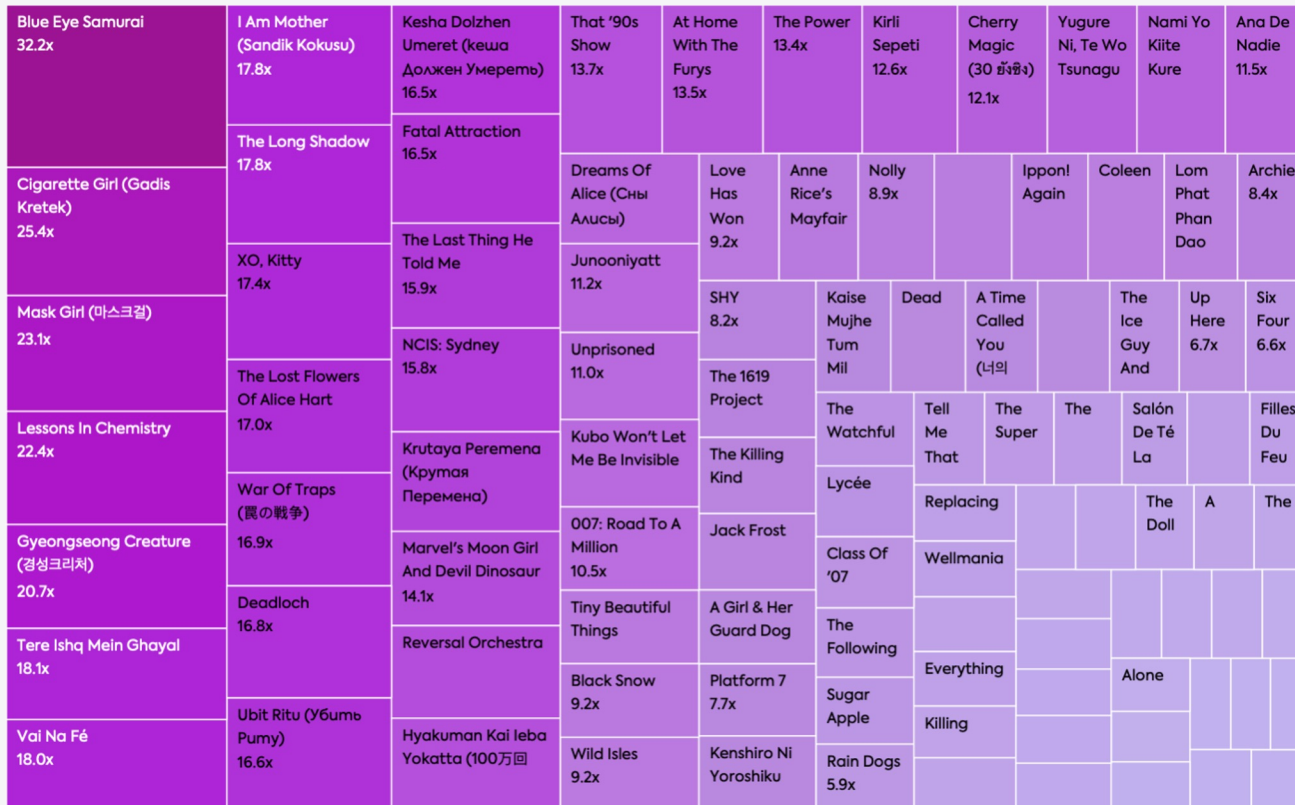
vs. 33%

# 58%

FEMALE



vs. 67%



# Major Takeaways

## Increasing audience reception towards shows with female creators

- The demand share of series with majority female creators has more than doubled between 2017 and 2023.
- Across both scripted and unscripted content, the number of new productions and audience demand for series with majority female representation behind the camera is growing at a significantly faster pace than those with a minority female presence behind the camera.
- Within majority female BTC productions alone, the demand outstrips the supply, suggesting each new series, on average, is of higher quality and capturing a high share of audience attention.

## Greater opportunity among scripted

- Unscripted series with majority female BTC representation has seen less growth than scripted series. This is likely due to the push towards more female inclusivity in the scripted space over the last few years, while unscripted has historically had more female presence, so there is less room for growth.
- In the scripted space, there has been about a 2x increase in demand for content with majority female representation across behind the camera roles.

## More inclusive behind the screen talent = wider audience reach with diverse tastes

- Genres with the greatest demand growth among majority female BTC series show a move away from traditionally female genres and migration towards more traditionally male skewing genres, including Action, Adventure, Sci-Fi, War, among others.
- The audiences of majority female BTC series has shifted from majority female towards a more even male/female split between 2017 and 2023, signifying that women are producing engaging content that reaches beyond female audiences. This in combination with the growth in diverse genres showcases how the increase in inclusivity behind the screen has helped reach a wider audience base across genres.

## US dominates global share, LATAM has seen greatest relative growth

- Markets that dominate the global demand distribution of majority female BTC series, most notably the US and UK, mirror the markets that produce the most series overall.
- Relative to its region, LATAM has seen the greatest change in demand growth among majority female BTC series, increasing its share 4x between 2017 and 2023. This is likely prompted by the increase in investments made by global streamers, Netflix and Amazon, in the region over the last 5+ years, particularly among telenovelas.



Thank You

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# Unlocking the magic of content in the attention economy



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