

INCUMBENTS AND CHALLENGERS: WHAT'S THE CURRENT STATUS?



Introduction

HBO and Netflix have emerged as the leading providers of high-quality, original content. HBO's *Game of Thrones* has earned millions of viewers and a record-breaking 12 Emmys, while Netflix's *House of Cards* and *Orange is the New Black* proved that TV shows don't have to air on linear networks to be successful. Others such as Amazon have also started developing their own content, forming a rich ecosystem of TV platforms and associated content.

But how are all these platforms doing compared to each other? In this analysis, we compare the demand for HBO, Netflix and Amazon's top 5 titles in three different markets: the US, the UK and Australia. What are the most popular titles on each platform? How do they compare to each other? Based on this, which platform is doing better in which market?

Who's leading, who's challenging and who's following?

Global Content Demand

With the rapid proliferation of content distribution platforms and the unprecedented levels of consumer fragmentation, existing TV measurement services are rapidly becoming obsolete.

Survey and panel-based measurement are no longer sufficient to provide the global view of consumer demand for content across platforms.

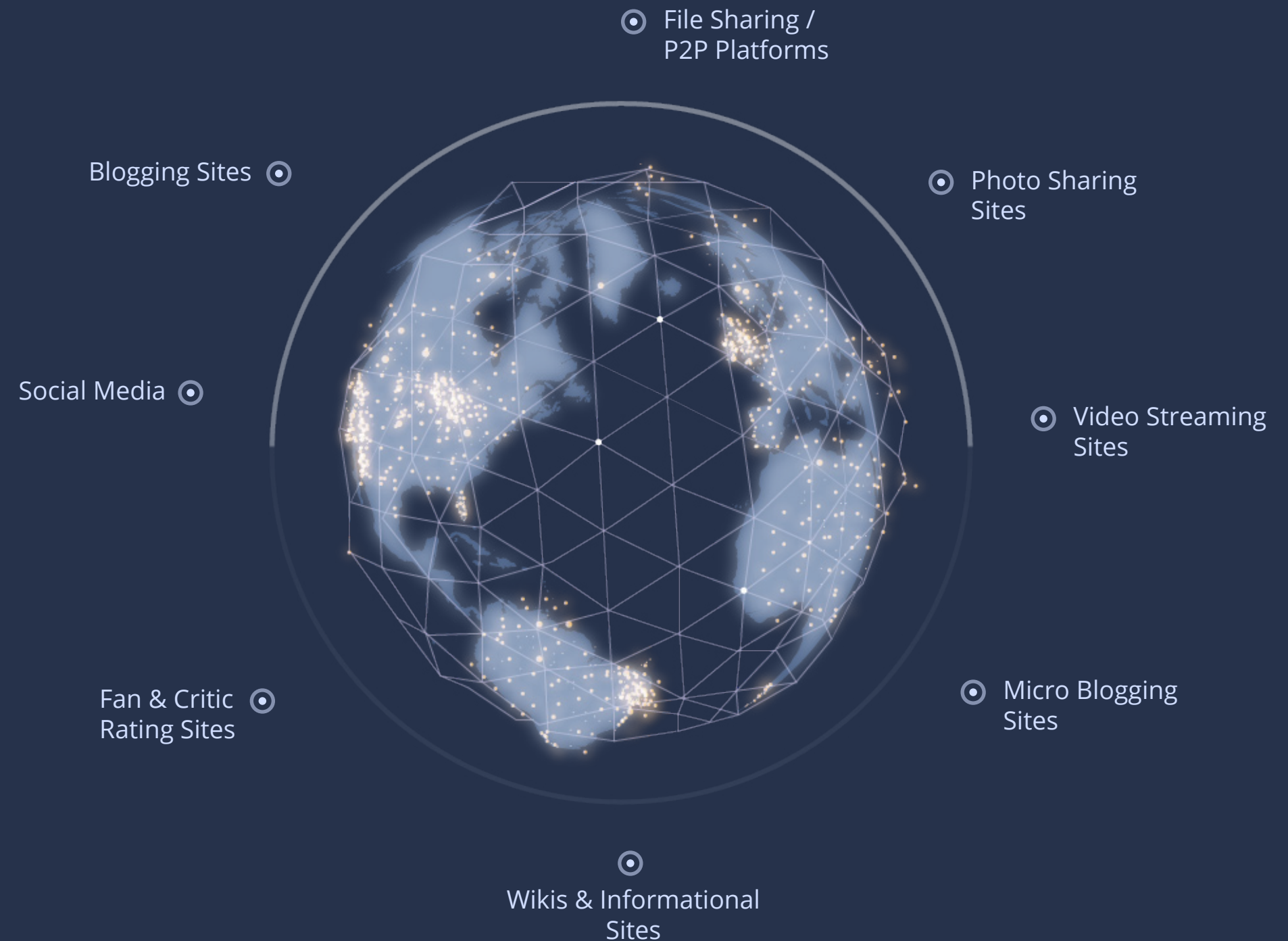
The solution to the industry's difficulty in navigating the cross-platform fragmentation is through measuring Global Content Demand.



Global Content Demand

Consumers express their demand for content through various 'demand expression platforms' including:

- **Video Streaming Platforms**
- **Social Media Platforms**
- **Photo Sharing Platforms**
- **Blogging & Micro-Blogging Platforms**
- **Fan & Critic Rating Platforms**
- **Wikis & Informational Sites**
- **Peer-to-Peer Protocols**
- **File-Sharing Platforms**



View Stats

INTRODUCING

Demand Rating™

The World's Only Cross-Platform Global Demand Rating System

TV
Homeland

TV
The Walking Dead

Parrot Rating™
93.67

Global Uptake

US Demand

Parrot Rating™
98.82

Global Uptake

US Demand

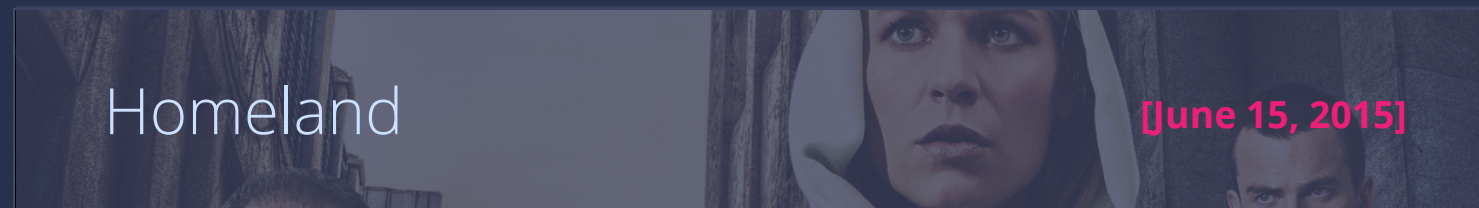
Global Demand Rating System

Demand Rating™






A relative measure of demand across markets.

Demand Expressions™

An absolute measure of demand within a market.



Homeland [June 15, 2015]

Country	Demand Rating™
 USA	65.80
 Australia	59.04
 Germany	48.18
 France	43.11
 South Korea	28.90



Germany [June 15, 2015]

Show Titles	Demand Expressions™ [Germany]
 The Walking Dead	5,810,353
 Doctor Who	600,810
 Daredevil	493,451
 Misfits	213,325
 Star Trek: The Next Generation	156,493

Analysis of Platform Demand

We average the Demand Rating™ and Demand Expressions™ for each title during September in three markets and then compare the top 5 titles from each platform: HBO, Netflix and Amazon.

Overview

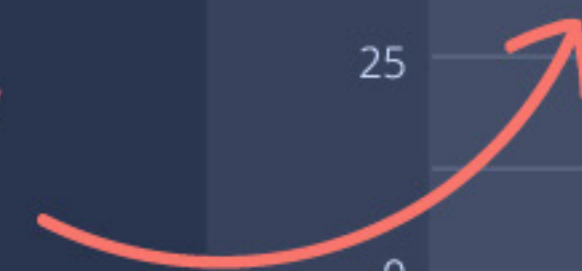
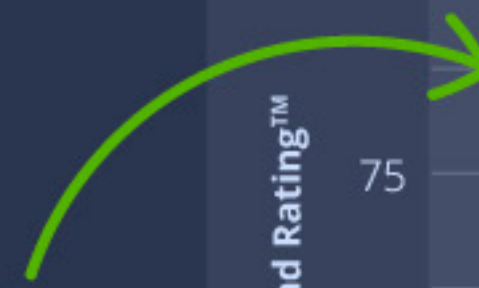
In this visualization, each point represents the September average Demand Rating™ for one of 15 shows:

5 from each platform.

Starting from the top, we find that an HBO title– *Game of Thrones*– has significantly more demand than the rest

Other than this outlier, Netflix and HBO titles seem to be similar levels of demand.

In all three markets, Amazon's titles have considerably less demand than HBO and Netflix titles



Average Demand for the Top 5 Titles on Each Platform



Game of Thrones and Orange is the New Black vying for first in Australia

Game of Thrones has by far the most demand in each market we analyzed.

In Australia, it has nearly the same amount of demand as *Orange is the New Black*.

These two shows have more than twice the demand of the next most-popular HBO show, *True Detective*. Rounding out HBO's top 5 is *Ballers*, *Silicon Valley* and *Last Week Tonight*.

One may expect other HBO hits such as *Girls* and *Veep* to be on this list, but these titles have not aired as recently and so are not currently as in-demand as the top 5 titles.

Platform	Title	Demand Expressions™
HBO	Game Of Thrones	1,789,624
NETFLIX	Orange Is The New Black	1,732,234
HBO	True Detective	720,022
HBO	Ballers	517,945
NETFLIX	House of Cards	463,106
NETFLIX	Narcos	420,091
HBO	Silicon Valley	380,715
HBO	Last Week Tonight With John	380,139
NETFLIX	Daredevil	275,306
NETFLIX	BoJack Horseman	270,514
amazon	Hand of God	151,032
amazon	Bosch	138,428
amazon	Transparent	134,650
amazon	The Man In The High Castle	60,226
amazon	Mozart in the Jungle	46,914

HBO and Netflix demand closest in the UK

In the UK, *Game of Thrones* reigns unopposed, with nearly 3 times the demand of the number-two *Narcos*.

Despite this dominance, Netflix's titles put up strong competition: the UK has the least difference between the average demand for HBO and Netflix titles.

Note that one of Amazon's titles, *The Man in the High Castle*, is still in its pilot stage, yet still has nearly 3 times the demand of *Mozart in the Jungle*, a fully released show.

Platform	Title	Demand Expressions™
HBO	Game Of Thrones	6,477,328
NETFLIX	Narcos	2,236,630
HBO	True Detective	2,124,603
NETFLIX	Orange Is The New Black	2,065,790
HBO	Ballers	1,422,543
NETFLIX	Daredevil	1,187,513
NETFLIX	House of Cards	959,685
HBO	Silicon Valley	930,881
amazon	Hand of God	897,146
HBO	The Leftovers	822,507
NETFLIX	Sense8	746,785
amazon	Bosch	321,833
amazon	Transparent	312,461
amazon	The Man in The High Castle	264,767
amazon	Mozart In The Jungle	90,137

Unusual Netflix demand patterns in the US

Netflix's flagship title *House of Cards* does not appear in the top 5 in the US as it was just squeezed out by *Marco Polo*. *House of Cards* got 55.59 Demand Rating™ compared to *Marco Polo*'s 55.68.

In Amazon's camp, we find that *Transparent*, despite its cultural and Emmy buzz, has less demand than Amazon's latest series, *Hand of God*.

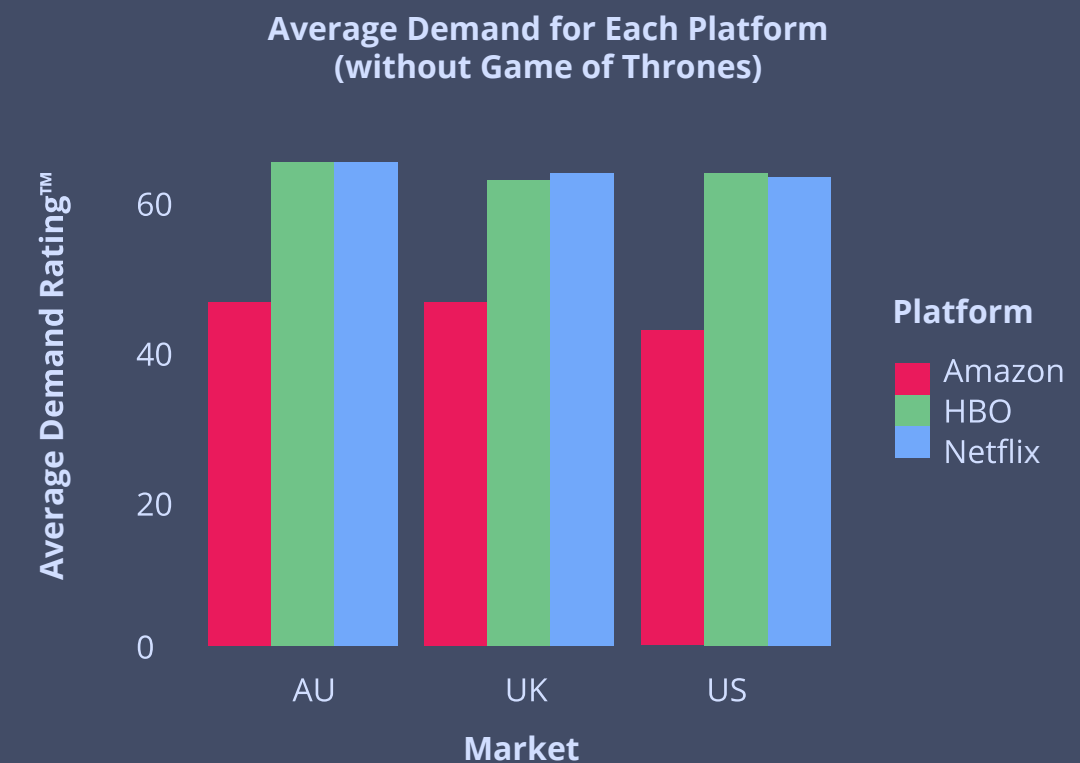
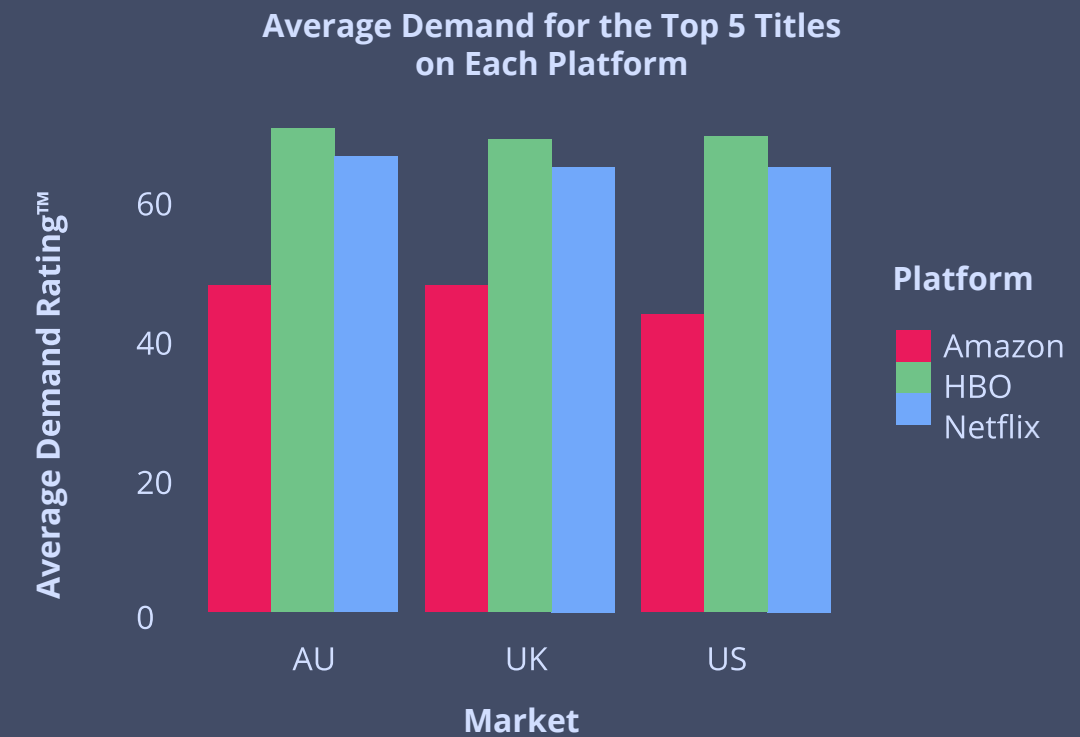
Platform	Title	Demand Expressions™
HBO	Game Of Thrones	28,260,856
NETFLIX	Narcos	14,275,465
NETFLIX	Orange Is The New Black	7,997,992
HBO	True Detective	7,836,431
HBO	Silicon Valley	6,344,157
HBO	Last Week Tonight With John Oliver	5,668,791
HBO	Ballers	4,806,092
NETFLIX	Sense8	4,797,541
NETFLIX	Daredevil	4,675,525
NETFLIX	Marco Polo	2,798,578
amazon	Hand Of God	1,951,828
amazon	Transparent	1,302,988
amazon	The Man In The High Castle	1,017,991
amazon	Bosch	559,033
amazon	Mozart In The Jungle	385,245

HBO and Netflix Tied ... without Game of Thrones

Since *Game of Thrones* is so dominant, it is no surprise to see that HBO has the highest average demand for its top 5 titles in all three markets, as shown in the top plot.

If we remove *Game of Thrones* from HBO's average, as in the bottom plot, we find that HBO and Netflix have nearly the same demand for their top content. In fact, Netflix very slightly overtakes HBO in the UK

As before, Amazon lags behind these two giants in terms of demand for their original content.



Key Results

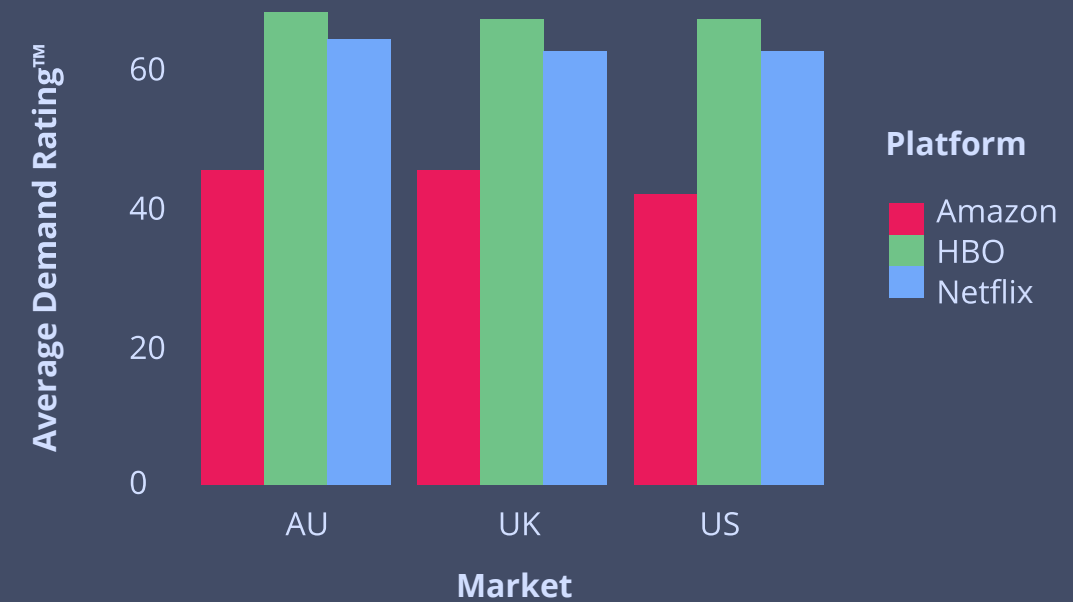
From this analysis on data from September 2015, we can evaluate how well each platform – Netflix, HBO and Amazon – are doing relative to each other.

Amazon is still a follower in the digital originals game

In terms of demand for their original content, Amazon lags significantly behind Netflix and HBO.

Even their most well-known title, *Transparent*, does not seem to have attracted as much demand as some of Amazon's other titles.

Average Demand for the Top 5 Titles on Each Platform



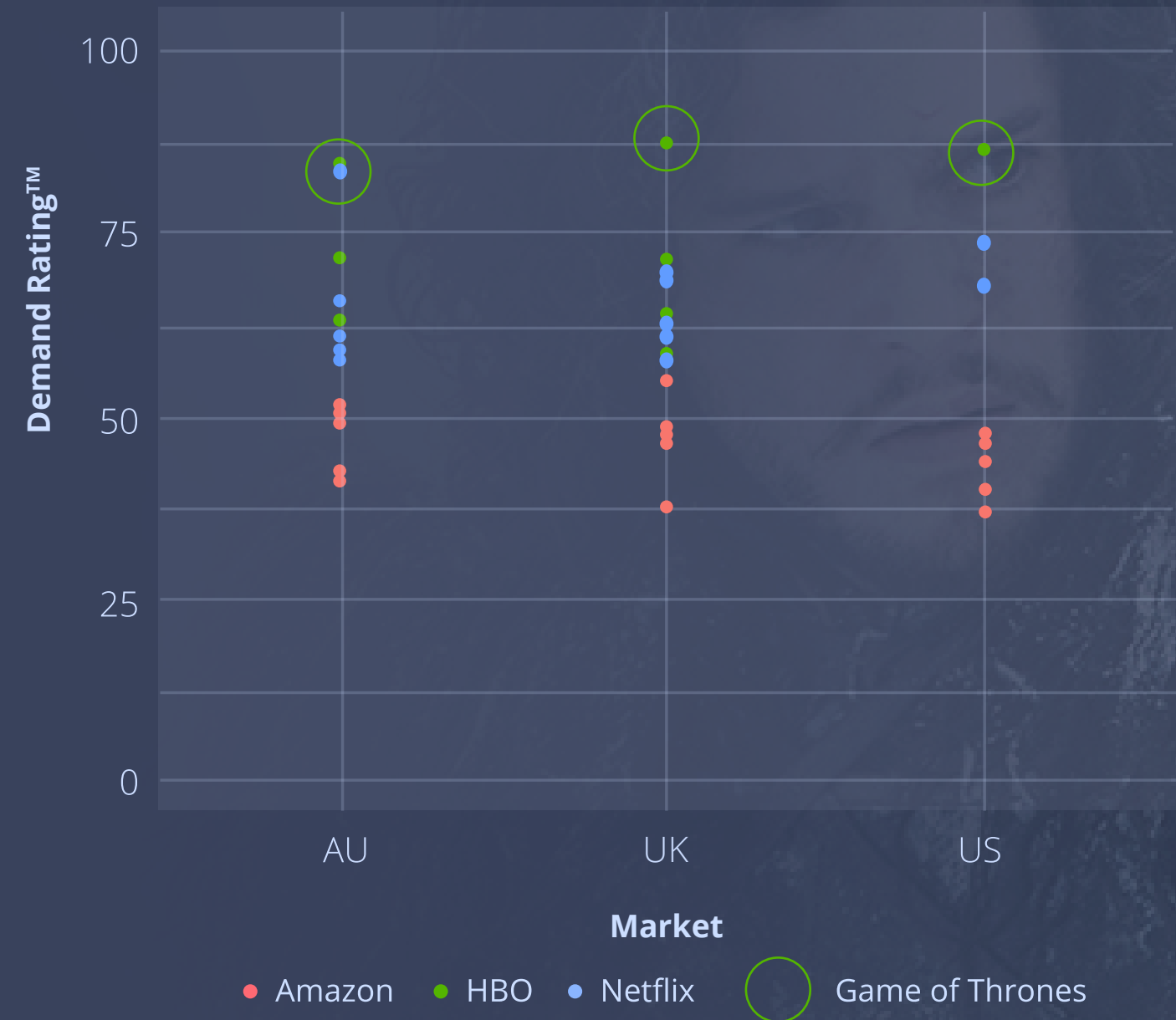
Game of Thrones propels HBO into the lead

Game of Thrones has proven to be HBO's most valuable show, with between 2 and 3 times the demand of the next most-popular titles.

This incredible amount of demand has established HBO as the leader in quality original content, at least for now.

Without *Game of Thrones*, Netflix has nearly the same demand for its content as HBO, making it a strong challenger to HBO's throne.

Average Demand for the Top 5 Titles on Each Platform





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