



Latin America | January – June 2023

Crossing Borders:

Top Content Trends Across
Latin America and Spain

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SPECIAL REPORT



Following several boom years of explosive global streaming growth, the industry has been disrupted by strikes this year that have added to concerns about the financial model of streaming.

In today's attention economy, audiences consume content previously inaccessible due to relatively limiting distribution deals. Streaming has opened up entire worlds to audiences globally.

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 Latin America, Spain, and the US Hispanic markets.

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EXECUTIVE SUMMARY

“ More than ever, to gain scale in the content business you need to maximize the efficiency of your content investments. At Parrot Analytics we guide companies to unlock audience demand into revenue-generating opportunities.”



Alejandro J Rojas
VP of Applied Analytics
Parrot Analytics

Argentina

Argentina had the largest share of demand for comedy series in Latin America.

Brazil

Shows from TV Globo accounted for the largest share of demand by original platform in Brazil, beating even Netflix.



RETHINKING THE TV BUSINESS

Chile

The variety genre made up a larger share of demand in Chile than in any other market we covered. In particular, the talk show subgenre ranked high here.

Colombia

Soap operas ranked as the most in-demand subgenre in Colombia with a wider lead over the second ranked subgenre than in any other market.

Mexico

Shows from Las Estrellas made up a larger share of demand in Mexico than any other platform or channel.

Spain

Spain was the most drama-loving market in this report. In particular, the thriller subgenre ranked higher in demand here than in any other market in this report.

US Hispanic

Netflix has the largest demand for its on-platform Spanish language series in the US but it is closely followed by Peacock, which leverages its catalog of Telemundo content.



STREAMING TRENDS IN LATIN AMERICA



A SLOW DOWN IN NEW STREAMING ORIGINALS

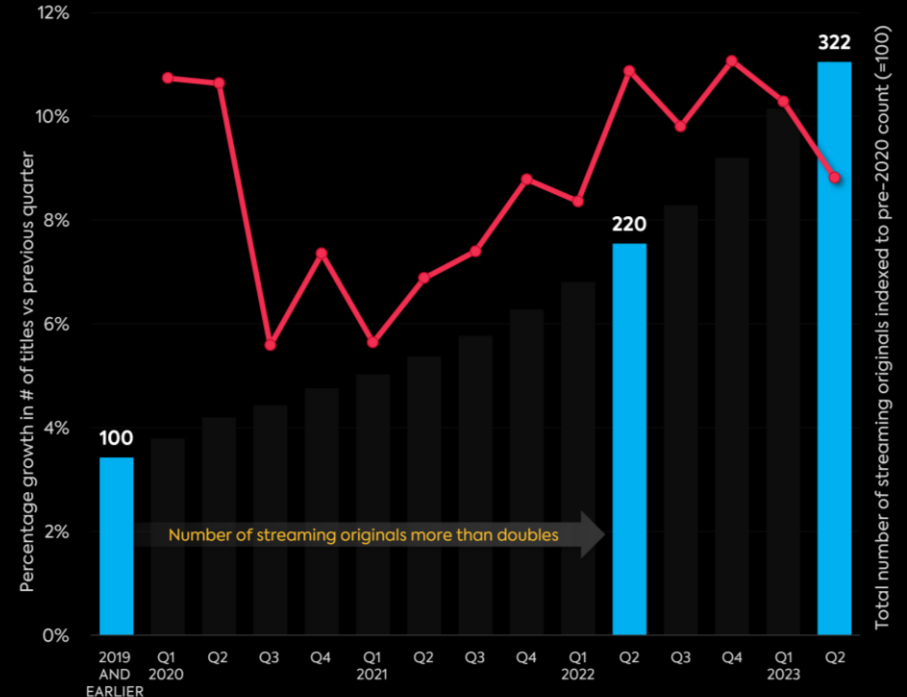
Over the past few years, the rapid proliferation of streaming platforms around the world has been accompanied by a boom in the number of shows available to audiences. By Q2 2022, the number of streaming original series was more than double the total number of streaming original series that had premiered prior to 2020.

If we look at the rate of growth in the number of series each quarter (red line) we can see that after the massive disruption to production caused by the pandemic, the pace of new series premiering accelerated for most of 2021 and 2022.

However, so far this year, the rate of new streaming original series premiering has fallen each quarter potentially signaling a slow down of the streaming content boom times. It is important to note that any impacts to production caused by the ongoing strikes are likely not reflected in the numbers for the first half of this year and would be seen further downstream.

Monthly Percentage Growth in Number of Streaming Original Titles

Global | Q1 2020 – Q2 2023

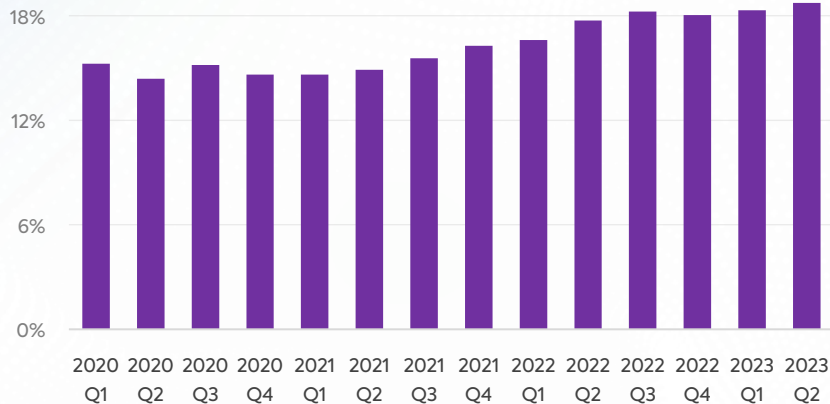


Questions? Write to charts@parrotanalytics.com

BUT STREAMING CONTENT MAKES UP A RECORD SHARE OF DEMAND IN LATAM

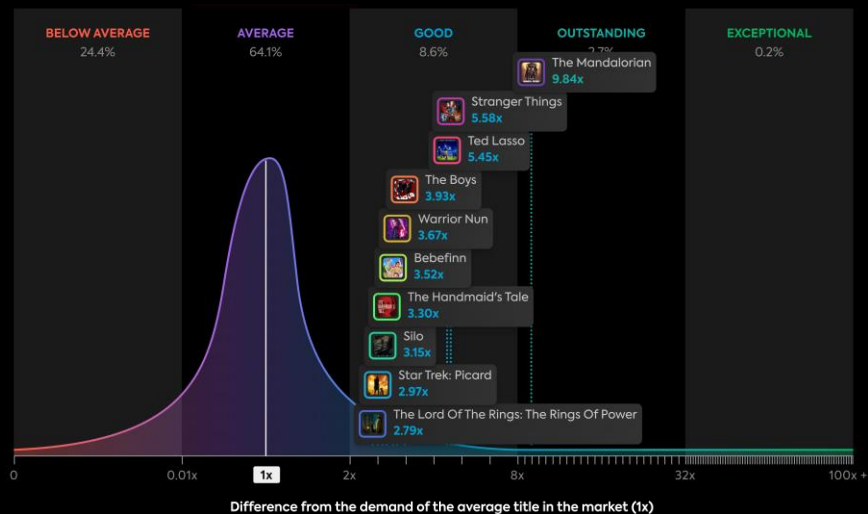
Streaming original series made up a record share of demand in Latin America in Q2 2023, accounting for 18.7% of demand for all shows. However, there is a noticeable leveling off after the increasing share in 2021-2022. For most of the past year, the share of demand for streaming originals has hovered around 18%.

Share of Total Series Demand for Streaming Originals (LATAM, Jan 2020 – Jun 2023)



Most In-Demand Streaming Originals

Latin America | Jan – June 2023

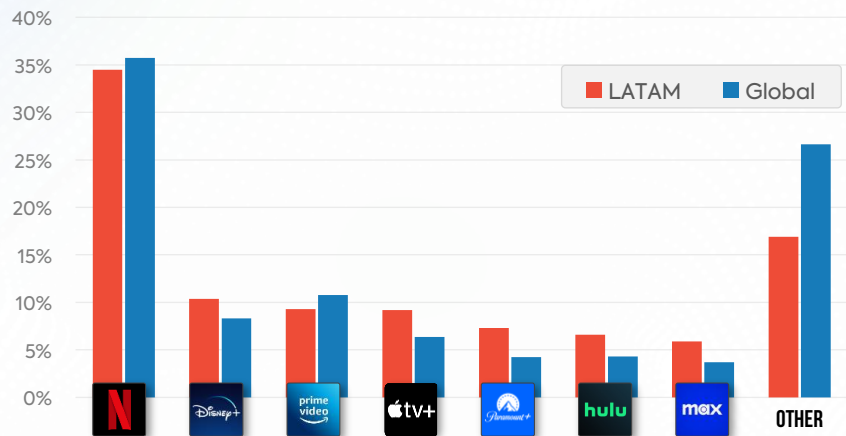


The four most in-demand streaming original series in Latin America for the first half of the year all came from different platforms. Leading the pack was Disney+'s *The Mandalorian*, which had 9.84 times the average series demand in the region and released its third season in March. Apple TV+ looks to be punching above its weight with two of the ten most in-demand streaming original series.

WHICH PLATFORM ORIGINALS ARE DRIVING STREAMING DEMAND IN LATAM

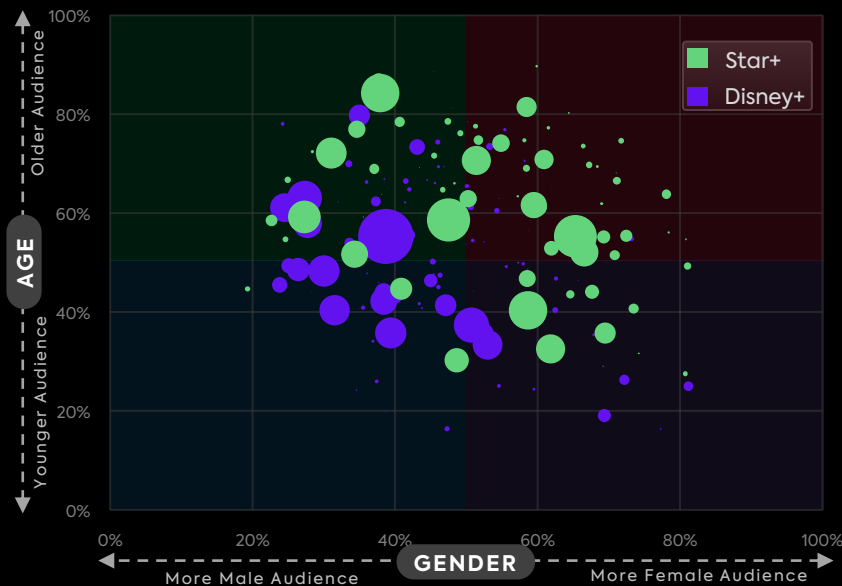
Audiences in LATAM give a different share of attention to platforms' original content than global audiences. Originals from the most global platforms, Netflix and Amazon Prime Video, make up a larger share of global audience attention than in LATAM. Meanwhile, Paramount+ original content outperforms in LATAM relative to its global share of demand.

Share of Streaming Original Demand by Original Platform (Jan – Jun 2023)



Demographic Distribution for Disney+ and Star+ Originals

Latin America | Jan – Jul 2023

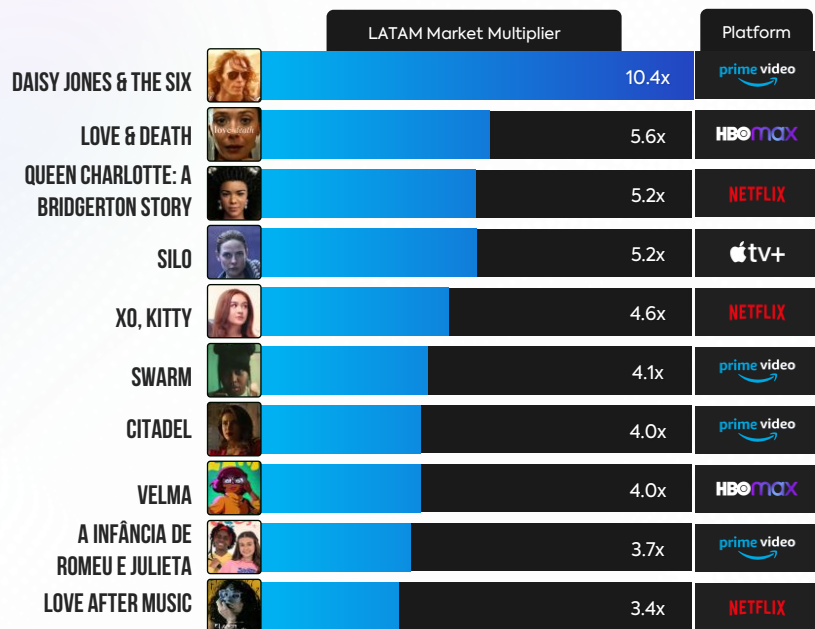


One of the best examples of platforms with complementary demographics being bundled is Disney+ and Star+ in Latin America. The audiences for Disney+ originals skew younger and more male, while the demographics for Star+ original content tend to be older and more female.

Daisy Jones & the Six was the most in-demand streaming release in the region in the first half of 2023, when considering demand during the first month after the premiere. The show is followed by HBO Max's *Love & Death* and Netflix's *Queen Charlotte*.

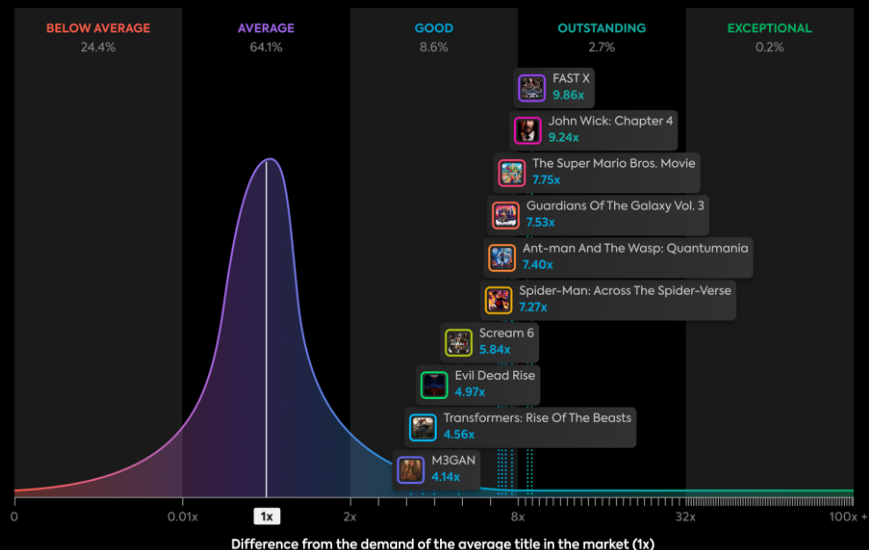
Top Streaming Series Premieres Jan 1 – Jun 1, 2023

Latin America | 30 days after each show premiere



Most in-demand movies to premiere in the first half of 2023

Latin America | Jan – Jun 2023



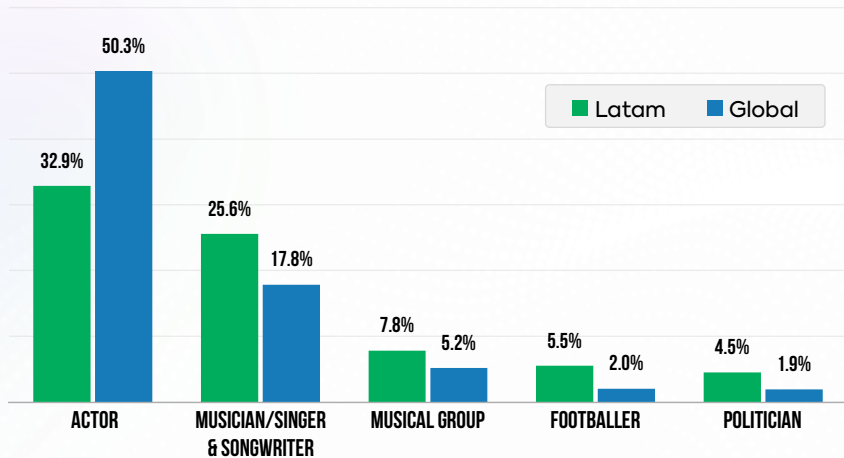
Superhero and franchise movies dominated the top movie premieres ranking in the first half of the year. *Fast X*, *John Wick: Chapter 4*, and *The Super Mario Bros. Movie* were the most in-demand movies released in 2023 in the region. They are followed by three Marvel movies. There is also a growing demand for horror movies in the region. *Scream 6*, *Evil Dead Rise*, and *M3GAN* were among the most in-demand movie premieres.

TALENT DEMAND: FINDING THE RIGHT TALENT TO ENGAGE LATAM AUDIENCES



WHAT KIND OF TALENT ARE MOST IN-DEMAND?

Talent Demand Share by Profession (Jan – Jun 2023)



LATAM audiences love musical talent. The share of talent demand for musicians and musical groups in the region is considerably higher than the global average. Football-related talent, a national passion in most LATAM countries, make up more than twice the share of talent demand in LATAM compared to the global share of demand for these talents.

RISING LATAM STARS IN THE REGION:

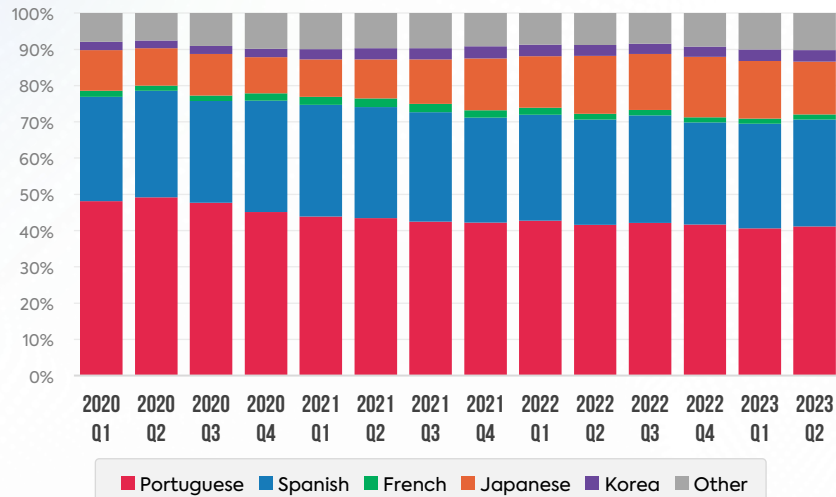
	TALENT	PROFESSION	COUNTRY
1	Emilio Osorio	Actor	MX
2	Melody	Singer	BR
3	João Guilherme	Actor	BR
4	Mel Maia	Actress	BR
5	Manuel Turizo	Musician	CO
6	Anavitória	Musician	BR
7	Maisa Silva	Actress	BR
8	Kenia Os	Social Media Influencer	MX
9	Rodrygo	Football Player	BR
10	Vinicius Junior	Football Player	BR

This analysis looks at the talent under 25 years old that had the best improvement in their demand rank from May to June 2023. We can see a solid number of rising Brazilian talents in the last month, especially musicians and football players. However, topping the ranking of fastest rising stars from the region is Mexican Actor, Emilio Osorio.

GROWING DEMAND FOR JAPANESE AND KOREAN CONTENT

LATAM audiences are diversifying their attention in terms of content in different languages. In 2020 Q1, the share of demand for content in Portuguese or Spanish was 76.9%. In 2023 Q2 this share dropped to 70.7%. On the other side, the demand share for shows in Korean or Japanese grew from 13.5% to 17.7% in that period.

Share of Demand in LATAM by Original Language Excluding English (Jan - Jun 2023)



Most In-Demand Japanese Shows in Latin America

Latin America | Jan - Jun 2023

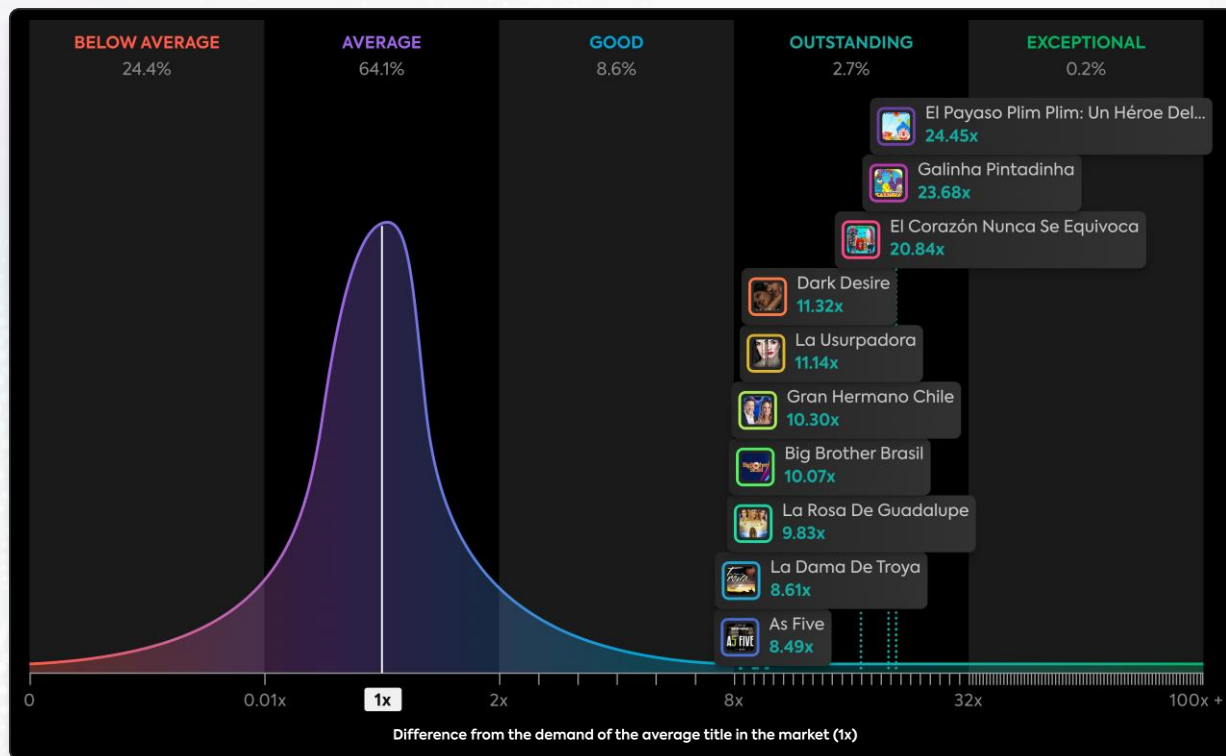


WHAT JAPANESE SHOWS ARE BEING WATCHED IN LATAM

Anime is very popular in Latin America. The original *One Piece* anime is the top Japanese language show in the region, which bodes well for the success of Netflix's live action remake. Other classic animes such as *Naruto* and *Pokémon* are also popular in the region. More recent shows like *My Hero Academia*, *Jujutsu Kaisen*, and *Demon Slayer* are also among the most in-demand Japanese language titles.

WHICH CONTENT IS SUCCESSFULLY EXPORTED FROM LATAM TO THE WORLD?

Most Globally Demanded Content from LATAM (Apr – Jun 2023)



Kids series coming out of the region are some of the most globally popular exports from Latin America.

El Payaso Plim Plim was the most globally popular show originating in LATAM with 24.45 times the average series demand globally in Q2 2023. The Brazilian show *Galinha Pintadinha* came close to reaching this level of global demand as well.

Mexico stands out as a key source of drama/soap opera shows for the global market, home to titles like *El Corazón Nunca Se Equivoca*, *Dark Desire*, and *La Rosa De Guadalupe*. Local versions of the international Big Brother franchise also found fans around the world.

MARKET-SPECIFIC TV CONTENT TRENDS

Genre and subgenre preferences, share of demand by original platform, and most in-demand series

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

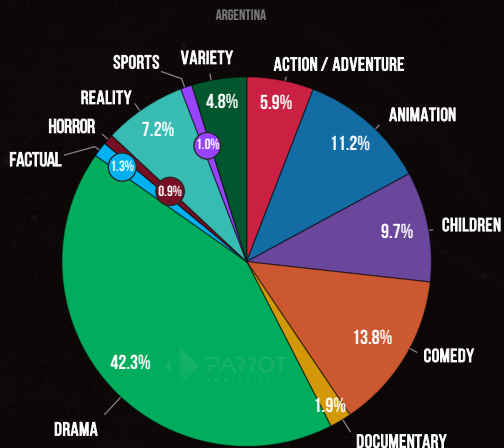
We also present our findings on the genre and subgenre preferences of each market, and the top 20 overall most in-demand series across all platforms.



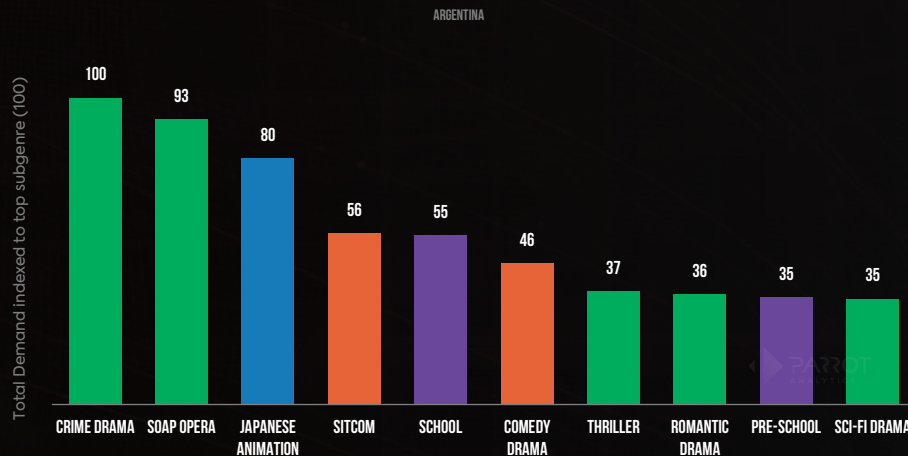


Argentina Genre and Subgenre Preferences for Series

Genre demand share for all series in Q2 2023



The 10 most in-demand subgenres across all series in Q2 2023



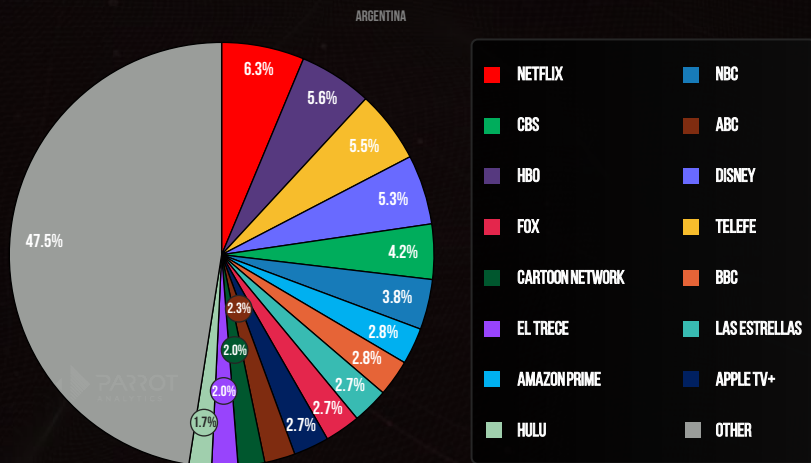
- Argentinian audiences gave the second largest share of demand to the drama genre in this report. 42.3% of demand for series in Argentina was for a drama.
- Comedy stands out as a popular genre in Argentina. 13.8% of demand in Q2 was for a comedy series – the largest share of demand for comedy of Latin American markets in this report.
- The reality genre had the second smallest share of demand in Argentina of all markets in this report. 7.2% of demand for shows in Q2 2023 was for reality series in Argentina.

- Argentina was one of two markets in this report where crime drama ranked as the most in-demand subgenre of the quarter.
- Five of the ten most in-demand subgenres in Argentina for the quarter were drama subgenres, reflecting high demand for dramas overall.
- Argentina was one of two markets in this report (along with Spain) where the thriller subgenre ranked in the top ten subgenres for the quarter.

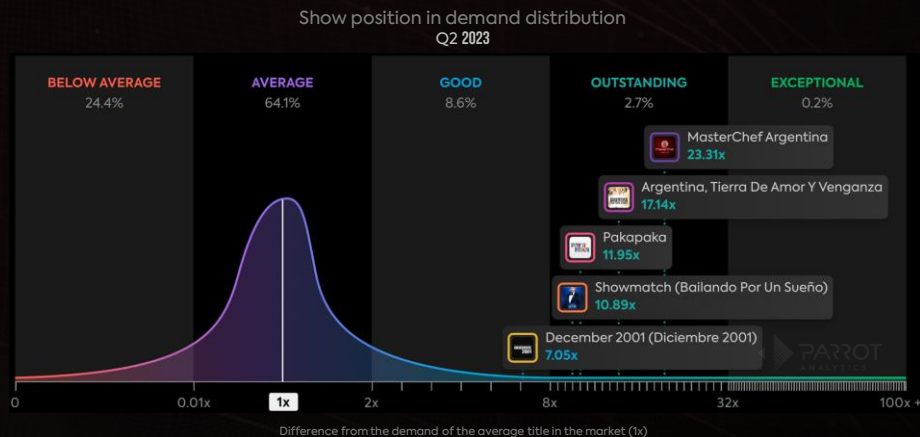


Argentina Originals Share of Demand and Demand Distribution

Market demand share by original platform for all series



Demand distribution of a selection of top series



- Shows from the local channel Telefe drove 5.5% of demand for all series in Argentina in Q2 2023. The platform ranked as the third largest in terms of its demand share this quarter.
- Content from Disney+ and Disney channels found success in Argentina. These series made up 5.3% of demand for all series in this market, the largest share of demand in this report which it also achieved in Chile.
- Original content from the Argentine channel, El Trece, also stood out this quarter, accounting for 2% of demand for all series in Argentina this quarter.
- MasterChef Argentina*, the local version of the internationally popular format was the most in-demand show in Argentina for the quarter when it had 23.3 times the average series demand.
- Argentina, Tierra De Amor Y Venganza*, a local telenovela from Canal 13 returned for its second season this April and ranked as the most in-demand telenovela in Argentina this quarter.
- The political drama, *December 2001*, from Star+ tells the story of the political and economic crisis in Argentina at the end of 2001. The local topic seems to have resonated in Argentina where the show had 7.1 times the demand of the average series for the quarter.



Top Series in Argentina

The top 20 most in-demand series:

SERIES NAME	ORIGINAL PLATFORM	GENRE	DIFFERENCE FROM AVERAGE TITLE (1X) IN Q2 2023	
1 <i>MasterChef Argentina</i>	Telefe	Reality	23.3	
2 <i>Succession</i>	HBO	Drama	20.8	
3 <i>Casi Ángeles</i>	Telefe	Comedy	17.3	
4 <i>El Payaso Plim Plim: Un Héroe Del Corazón</i>	Disney Junior	Children	17.3	
5 <i>Argentina, Tierra De Amor Y Venganza</i>	Canal 13	Drama	17.1	
6 <i>The Mandalorian</i>	Disney+	Action and Adventure	16.0	
7 <i>The Simpsons</i>	FOX	Animation	15.6	
8 <i>Ted Lasso</i>	Apple TV+	Comedy	15.0	
9 <i>South Park</i>	Comedy Central	Animation	14.0	
10 <i>La Rosa De Guadalupe</i>	Las Estrellas	Drama	13.5	
11 <i>The Last Of Us</i>	HBO	Drama	13.3	
12 <i>The Owl House</i>	Disney Channel	Children	12.8	
13 <i>Masha And The Bear</i>	Russia-1	Children	12.7	
14 <i>Game Of Thrones</i>	HBO	Drama	12.1	
15 <i>Pakapaka</i>	Pakapaka	Children	11.9	
16 <i>El Corazón Nunca Se Equivoca</i>	Las Estrellas	Drama	11.6	
17 <i>Los Ángeles De La Mañana</i>	El Trece	Variety	11.6	
18 <i>Masha's Tales</i>	Russia-1	Animation	11.0	
19 <i>Showmatch (Bailando Por Un Sueño)</i>	Canal 9	Reality	10.9	
20 <i>Gran Hermano Argentina</i>	Telefe	Reality	10.8	

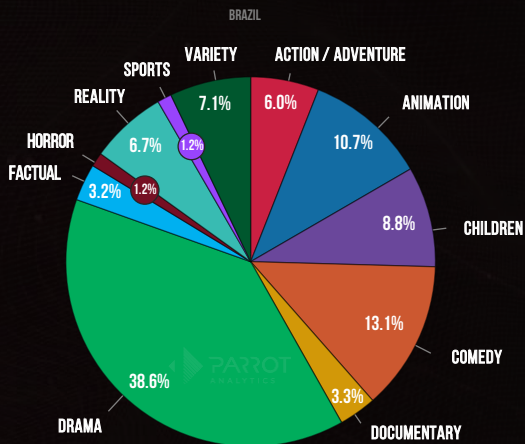
A selection of 5 additional series of interest:

30 <i>La Academia</i>	TV Azteca	Reality	9.1	
32 <i>Erkenci Kuş</i>	Star TV	Comedy	8.9	
59 <i>December 2001 (Diciembre 2001)</i>	Star+	Drama	7.1	
73 <i>Stickman (Çöp Adam)</i>	Star TV	Drama	6.2	
78 <i>Poker Face</i>	Peacock	Drama	6.1	

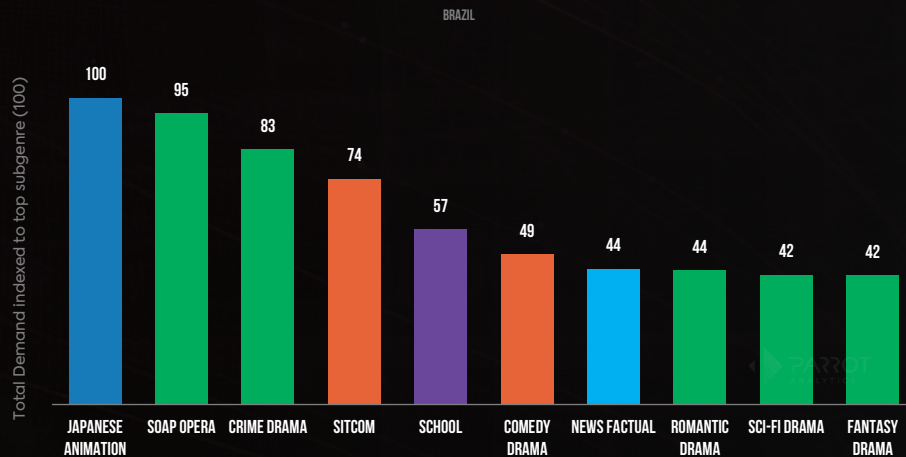


Brazil Genre and Subgenre Preferences for Series

Genre demand share for all series in Q2 2023



The 10 most in-demand subgenres across all series in Q2 2023



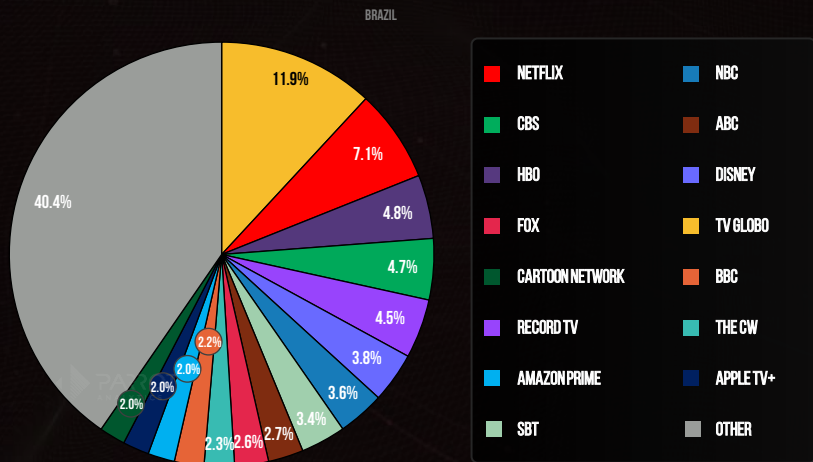
- Brazil had the second largest share of demand for horror content in this report. Horror series made up a 1.2% share of demand in Brazil this quarter, behind only Spain in this report.
- Bucking the trend across Latin American markets in this report, Brazilian audiences gave a greater share of demand to the documentary genre than global audiences (3.3% vs. 3.0%).
- The variety genre accounted for a 7.1% share of demand in Brazil this quarter, the genre's second largest share of demand in this report.

- The news factual subgenre was the seventh most in-demand subgenre in Brazil this quarter, the highest rank for this subgenre in this report, reflecting high demand for factual content overall in Brazil.
- Half of the ten most in-demand subgenres in Brazil were drama subgenres spanning a wide range of content from soap operas to fantasy to sci-fi dramas.
- In Brazil, Japanese animation ranked as the most in-demand subgenre this quarter, only beating out soap opera by a narrow margin.

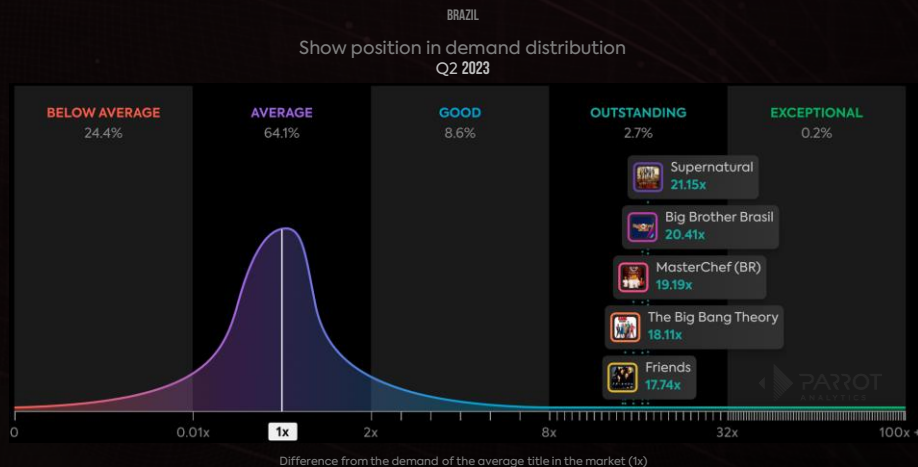


Brazil Originals Share of Demand and Demand Distribution

Market demand share by original platform for all series



Demand distribution of a selection of top series



- TV Globo series made up the largest share of demand in Brazil by original channel (11.9%) beating out even Netflix (7.1%).
- Shows from Record TV, another local channel, also drove a significant amount of demand in Brazil in the past quarter, accounting for a 4.5% share of demand for all series.
- The CW was successful at catching audiences' attention in Brazil where its shows made up 2.3% of demand for the quarter, a larger share of demand than any other market in this report.

- Despite the low share of demand for the reality genre in Brazil, the local version of the **Big Brother** franchise ranked as the 17th most in-demand show for the quarter with 20.4 times the average series demand.
- American shows that have ended, like **Supernatural** and **The Big Bang Theory**, have high longevity in Brazil where they continue to be high in demand. These series ranked higher in Brazil than in any other market in this report as the 10th and 25th most in-demand show respectively.
- **MasterChef Brasil** was the most in-demand series from Rede Bandeirantes this quarter. The cooking competition had 19.2 times the demand of the average series.



Top Series in Brazil

The top 20 most in-demand series:

SERIES NAME	ORIGINAL PLATFORM	GENRE	DIFFERENCE FROM AVERAGE TITLE (1X) IN Q2 2023	
1 <i>Naruto</i>	TV Tokyo	Animation	24.6	
2 <i>Game Of Thrones</i>	HBO	Drama	24.5	
3 <i>Succession</i>	HBO	Drama	23.3	
4 <i>South Park</i>	Comedy Central	Animation	22.6	
5 <i>Balanço Geral</i>	RecordTV	Factual	22.6	
6 <i>Cidade Alerta</i>	RecordTV	Factual	22.0	
7 <i>The Mandalorian</i>	Disney+	Action and Adventure	21.8	
8 <i>Chocolate Com Pimenta</i>	Rede Globo	Drama	21.5	
9 <i>Porta Dos Fundos</i>	YouTube	Comedy	21.2	
10 <i>Supernatural</i>	The CW	Drama	21.1	
11 <i>One Piece</i>	Fuji Television Network	Animation	21.1	
12 <i>Galinha Pintadinha</i>	YouTube	Children	21.0	
13 <i>Ted Lasso</i>	Apple TV+	Comedy	20.9	
14 <i>The Walking Dead</i>	AMC	Drama	20.8	
15 <i>The Flash</i>	The CW	Action and Adventure	20.7	
16 <i>Jornal Da Record</i>	RecordTV	Factual	20.5	
17 <i>Big Brother Brasil</i>	TV Globo	Reality	20.4	
18 <i>Demon Slayer: Kimetsu No Yaiba</i>	Tokyo MX	Animation	20.4	
19 <i>SBT Brasil</i>	SBT	Factual	20.3	
20 <i>Grey's Anatomy</i>	ABC	Drama	19.3	

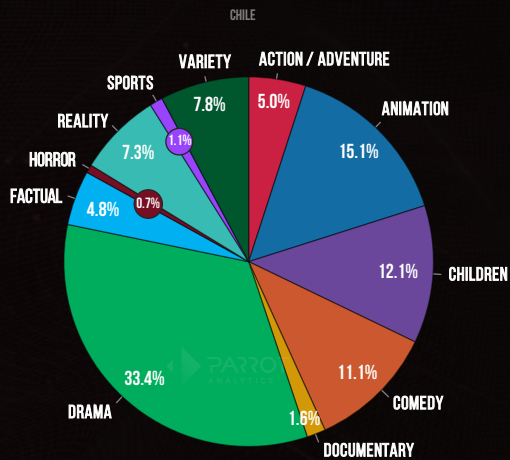
A selection of 5 additional series of interest:

21 <i>MasterChef (BR)</i>	Rede Bandeirantes	Reality	19.2	
25 <i>The Big Bang Theory</i>	CBS	Comedy	18.1	
28 <i>Friends</i>	NBC	Comedy	17.7	
31 <i>A Praça É Nossa</i>	SBT	Comedy	17.1	
49 <i>Vai Na Fé</i>	TV Globo	Drama	16.6	



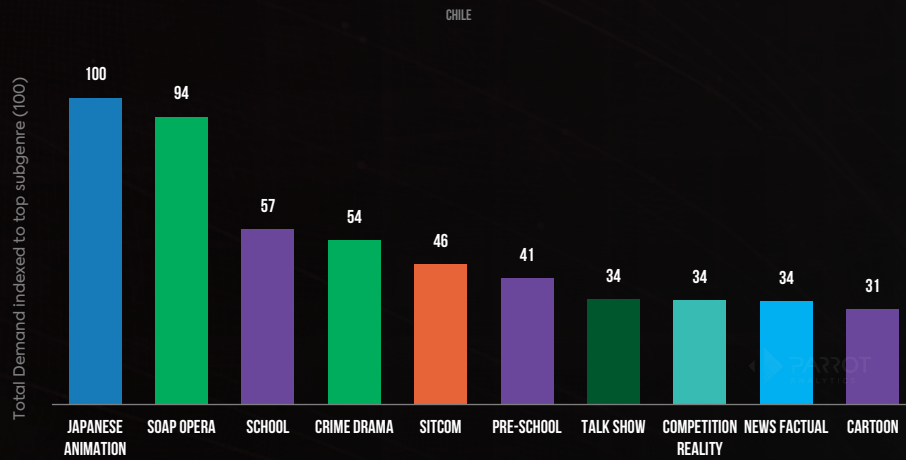
Chile Genre and Subgenre Preferences for Series

Genre demand share for all series in Q2 2023



- The 15.1% share of demand that Chileans gave to animation was the largest share of demand for animated content of markets in this report.
- 7.8% of demand for shows in Chile was for a variety series, making Chile the most variety-loving market in this report.
- Chilean audiences gave a high share of demand for factual/news content. 4.8% of demand for all series was for this genre, the highest demand share in this report.

The 10 most in-demand subgenres across all series in Q2 2023

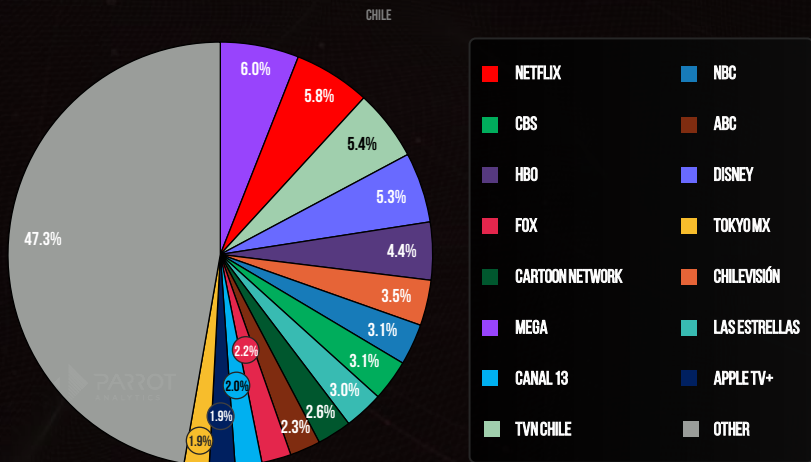


- Talk show achieved its highest rank in Chile of markets in this report as the seventh most in-demand subgenre, underscoring the popularity of variety content in this market.
- Three subgenres of children’s content ranked in the ten most in-demand subgenres in Chile for the quarter – School-age, pre-school age, and cartoon.
- Only two drama subgenres ranked in the ten most in-demand subgenres in Chile this quarter, highlighting the range of subgenres that are able to break through with audiences in this market.

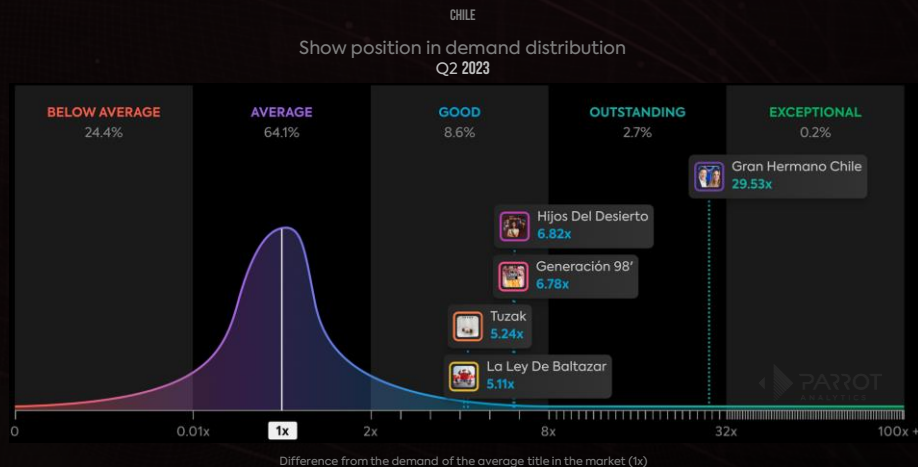


Chile Originals Share of Demand and Demand Distribution

Market demand share by original platform for all series



Demand distribution of a selection of top series



- Series from the local Chilean network, Mega, accounted for the largest share of demand in Chile in Q2 (6.0%), beating out even Netflix which had a 5.8% share of demand.
- Chile was one of the most receptive markets in this report for Disney original content. 5.3% of demand for shows in Chile in Q2 was for a show from a Disney branded platform or channel.
- Two other local networks ranked among the top platforms in Chile by share of demand for their original content. TVN Chile and Chilevisión had a 5.4% and 3.5% share of demand in Q2 2023 respectively.

- Gran Hermano Chile*, the local version of the *Big Brother* franchise, was the most in-demand show in Chile in Q2 2023 where it had 29.5 times the average series demand.
- Hijos del Desierto* was the most in-demand drama from the Chilean network Mega but was closely followed by another Mega original, *Generación 98'*. These shows had 6.82 and 6.78 times the average series demand respectively.
- The Turkish drama, *Tuzak*, had high travelability to Chile. This was the only market in this report where the show ranked in the top 100 most in-demand series for the quarter with 5.2 times the average series demand.



Top Series in Chile

The top 20 most in-demand series:

SERIES NAME	ORIGINAL PLATFORM	GENRE	DIFFERENCE FROM AVERAGE TITLE (1X) IN Q2 2023	
1 <i>Gran Hermano Chile</i>	Chilevisión	Reality	29.5	
2 <i>Meganoticias</i>	Mega	Factual	25.3	
3 <i>24 Horas (Chile)</i>	TVN Chile	Factual	24.1	
4 <i>The Mandalorian</i>	Disney+	Action and Adventure	14.3	
5 <i>Carmen Gloria A Tu Servicio</i>	Televisión Nacional de Chile	Variety	13.9	
6 <i>El Payaso Plim Plim: Un Héroe Del Corazón</i>	Disney Junior	Children	13.8	
7 <i>Morandé Con Compañía</i>	Mega	Comedy	13.8	
8 <i>Succession</i>	HBO	Drama	13.1	
9 <i>South Park</i>	Comedy Central	Animation	12.5	
10 <i>Masha And The Bear</i>	Russia-1	Children	12.2	
11 <i>La Rosa De Guadalupe</i>	Las Estrellas	Drama	11.9	
12 <i>Contigo En La Mañana</i>	Chilevisión	Variety	11.8	
13 <i>The Owl House</i>	Disney Channel	Children	11.3	
14 <i>Teletrece</i>	Canal 13	Factual	11.1	
15 <i>Ted Lasso</i>	Apple TV+	Comedy	10.9	
16 <i>31 Minutos</i>	TVN Chile	Comedy	10.7	
17 <i>Mucho Gusto</i>	Mega	Factual	10.6	
18 <i>The Last Of Us</i>	HBO	Drama	10.4	
19 <i>One Piece</i>	Fuji Television Network	Animation	10.0	
20 <i>El Corazón Nunca Se Equivoca</i>	Las Estrellas	Drama	9.9	

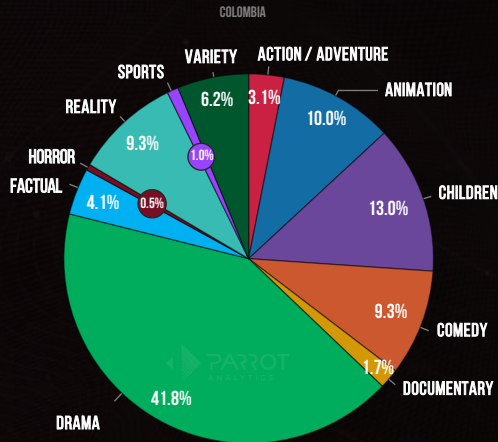
A selection of 5 additional series of interest:

33 <i>Hijos Del Desierto</i>	Mega	Drama	6.8	
34 <i>Generación 98'</i>	Mega	Drama	6.8	
49 <i>Como La Vida Misma</i>	Mega	Drama	5.7	
58 <i>Tuzak</i>	TV8	Drama	5.2	
62 <i>La Ley De Baltazar</i>	Mega	Drama	5.1	

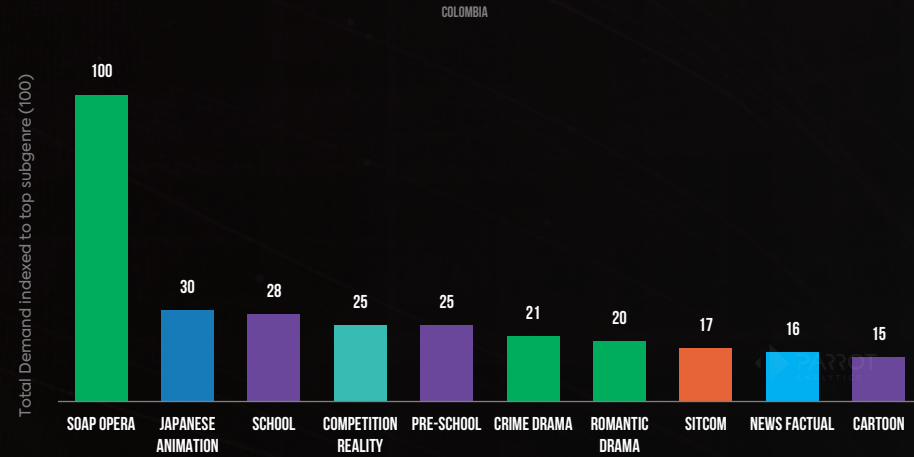


Colombia Genre and Subgenre Preferences for Series

Genre demand share for all series in Q2 2023



The 10 most in-demand subgenres across all series in Q2 2023



- Colombian audiences gave the lowest share of demand to the comedy genre in this report. Only 9.3% of demand for shows in Colombia was for a comedy series, well below the global share of demand for comedy – 13.5%.
- Children’s content stands out as particularly successful in Colombia. The genre accounted for 13.0% of demand for shows in Colombia this quarter, the genre’s highest share of demand in this report.
- Colombia had the lowest share of demand for action/adventure content in this report. Only 3.1% of demand for series in Colombia was for the action/adventure genre, which is less than half of the global share of demand for this genre (6.5%).

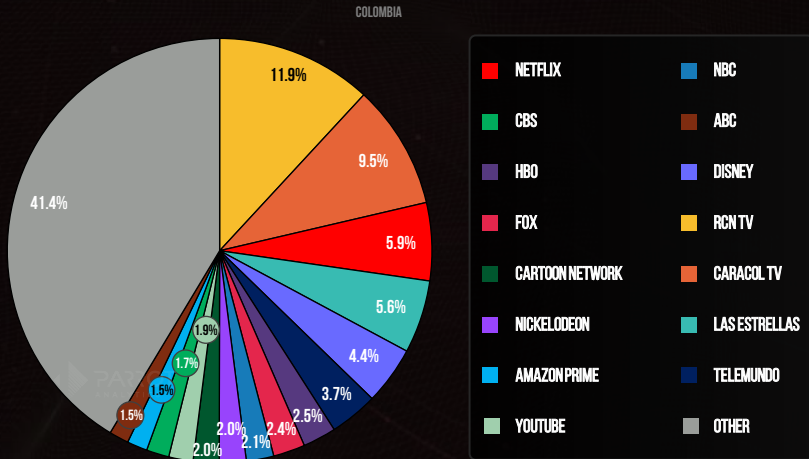
- More than any other market we covered in this report, Colombian audiences had very high demand for soap operas. The subgenre ranked as the most in-demand subgenre for the quarter by a wide margin.
- Three subgenres of children’s content ranked in the ten most in-demand subgenres in Colombia for the quarter – School-age, pre-school age, and cartoon.
- Competition reality is a particular type of reality content that has high demand in Colombia. This subgenre achieved its highest rank as the fourth most in-demand subgenre in Colombia in this report.



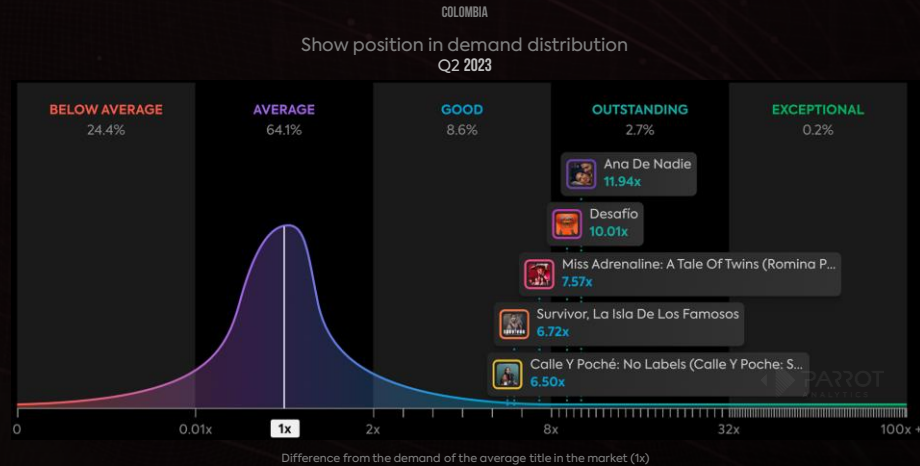


Colombia Originals Share of Demand and Demand Distribution

Market demand share by original platform for all series



Demand distribution of a selection of top series



- Content from RCN Television was notably successful in its home market. Nearly 12% of demand for series in Colombia this quarter was for an RCN Television series.
- Another local channel, Caracol Television, had the second largest share of demand for its original series in Q2 (9.5%). Together with RCN Television, these two channels made up over 20% of demand for shows in Colombia this quarter.
- Las Estrellas was also an important source of in-demand content in Colombia, accounting for 5.6% of demand for series in Q2, a slightly smaller share of demand than the demand for all Netflix originals in Colombia in Q2 (5.9%)

- Ana de Nadie*, a new telenovela from Canal RCN premiered in March and had 11.9 times the average series demand in Q2 2023 in Colombia.
- More than 15 years after the finale of the original *Celebrity Island*, RCN brought back the show this year as *Survivor, La Isla De Los Famosos*. The show had 6.7 times the average series demand in Q2 2023.
- Amazon Prime Video has also found success in Colombia with a new original reality series, *Calle y Poché: No Labels*, which had 6.5 times the average series demand this quarter.



Top Series in Colombia

The top 20 most in-demand series:

SERIES NAME	ORIGINAL PLATFORM	GENRE	DIFFERENCE FROM AVERAGE TITLE (1X) IN Q2 2023	
1 <i>Noticias RCN</i>	RCN	Factual	18.7	
2 <i>La Rosa De Guadalupe</i>	Las Estrellas	Drama	14.8	
3 <i>El Payaso Plim Plim: Un Héroe Del Corazón</i>	Disney Junior	Children	13.8	
4 <i>Tu Voz Estéreo</i>	Caracol Televisión	Drama	13.1	
5 <i>Masha And The Bear</i>	Russia-1	Children	12.6	
6 <i>Yo Soy Betty, La Fea</i>	RCN Televisión	Drama	12.2	
7 <i>Masha's Tales</i>	Russia-1	Animation	12.2	
8 <i>Ana De Nadie</i>	RCN TV	Drama	11.9	
9 <i>El Corazón Nunca Se Equivoca</i>	Las Estrellas	Drama	11.9	
10 <i>The Simpsons</i>	FOX	Animation	11.5	
11 <i>La Hija Del Mariachi</i>	RCN Televisión	Drama	11.2	
12 <i>Caso Cerrado</i>	Telemundo	Reality	10.9	
13 <i>La Academia</i>	TV Azteca	Reality	10.3	
14 <i>Desafío</i>	Caracol Televisión	Reality	10.0	
15 <i>Como Dice El Dicho</i>	Canal de las Estrellas	Drama	9.8	
16 <i>La Usurpadora</i>	Canal de las Estrellas	Drama	9.3	
17 <i>Tarde Lo Conocí</i>	Caracol Televisión	Drama	9.0	
18 <i>Peppa Pig</i>	Channel 5	Children	8.8	
19 <i>El Chiringuito De Jugones</i>	Mega	Factual	8.8	
20 <i>Galinha Pintadinha</i>	YouTube	Children	8.5	

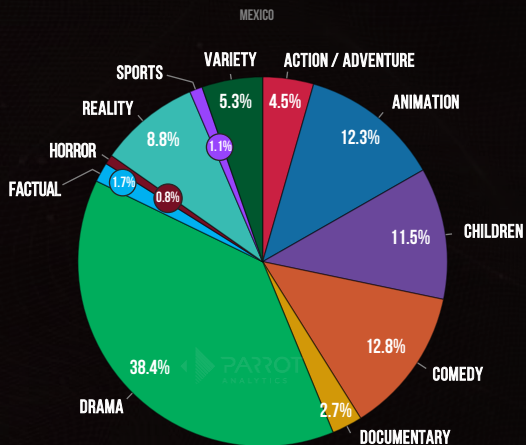
A selection of 5 additional series of interest:

22 <i>Emanet</i>	Kanal 7	Drama	8.1	
26 <i>Romina Poderosa</i>	Caracol TV	Reality	7.6	
35 <i>MasterChef Celebrity Colombia</i>	RCN TV	Reality	6.8	
36 <i>Survivor, La Isla De Los Famosos</i>	Canal RCN	Reality	6.7	
39 <i>Calle Y Poché: No Labels</i>	Amazon Prime Vídeo	Reality	6.5	



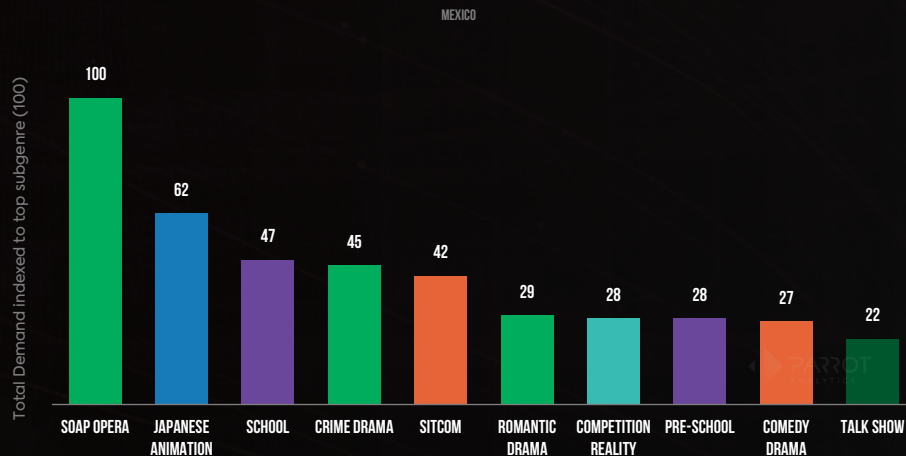
Mexico Genre and Subgenre Preferences for Series

Genre demand share for all series in Q2 2023



- 11.5% of demand for shows in Mexico was for a children’s series, well above the 7.4% global share of demand for this genre.
- The 4.5% share of demand that Mexican audiences gave to the action/adventure genre was the second smallest share of demand for the genre in this report and well below the global share of demand for action/adventure shows – 6.5%.
- The share of demand for animated shows in Mexico, 12.3%, made it the second most animation-loving market in this report.

The 10 most in-demand subgenres across all series in Q2 2023

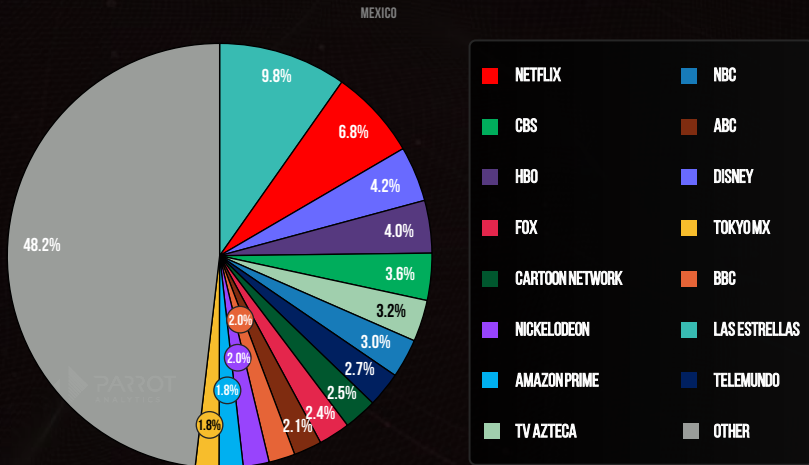


- Mexico was one of the two markets in this report where soap opera ranked as the most in-demand subgenre for the quarter, along with Colombia.
- Mexico was one of the three markets in this report where school-age shows ranked as the third most in-demand subgenre for the quarter, the highest rank for the subgenre.
- Talk shows ranked as the tenth most in-demand subgenre in Mexico. This type of content rarely ranks among the top subgenres and this reflects high demand for variety series in general in Mexico.

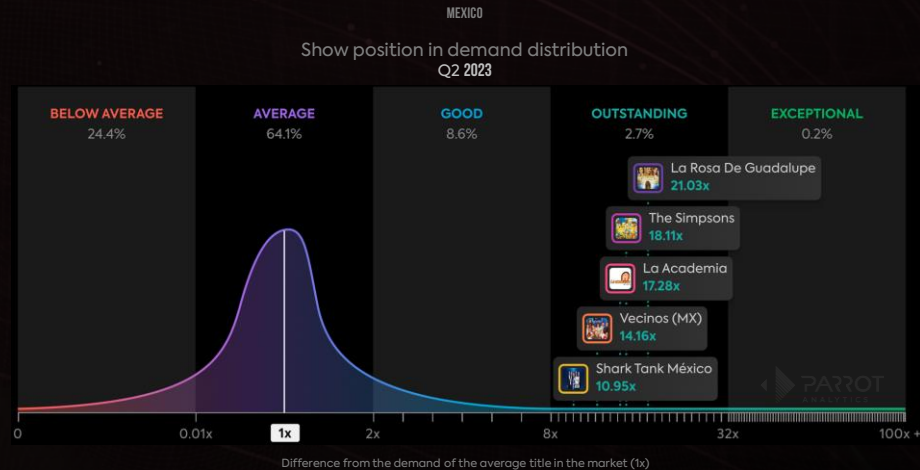


Mexico Originals Share of Demand and Demand Distribution

Market demand share by original platform for all series



Demand distribution of a selection of top series



- Las Estrellas was the biggest source of demand for content in Mexico in Q2 2023. 9.8% of demand for series was for a Las Estrellas show, beating out even Netflix (6.8%).
- Content from Disney branded platforms and channels was an important driver of demand for shows in Mexico. These shows accounted for 4.2% of demand, making Disney the third largest source of demand for shows in Mexico.
- Local content from TV Azteca made up a substantial share of demand in Mexico, accounting for 3.2% of demand for series in Mexico in Q2 2023.

- The popular and long-running Mexican anthology series, *La Rosa de Guadalupe*, from Las Estrellas was the most in-demand show in Mexico in Q2 2023. It had 21 times the average series demand for the quarter.
- *La Academia* was the most in-demand show in Mexico from TV Azteca this quarter. It had 17.3 times the average series demand and ranked as the sixth most in-demand show for the quarter.
- *The Simpsons* was notably successful in Mexico this quarter. It had 18.1 times the average series demand here and ranked as the fourth most in-demand show – higher than in any other market in this report.



Top Series in Mexico

The top 20 most in-demand series:

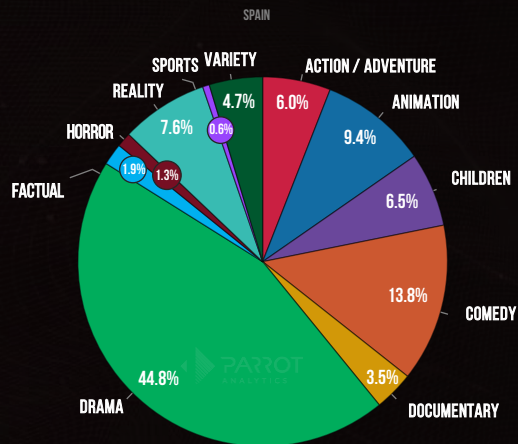
SERIES NAME	ORIGINAL PLATFORM	GENRE	DIFFERENCE FROM AVERAGE TITLE (1X) IN Q2 2023	
1 <i>La Rosa De Guadalupe</i>	Las Estrellas	Drama	21.0	
2 <i>The Mandalorian</i>	Disney+	Action and Adventure	20.4	
3 <i>South Park</i>	Comedy Central	Animation	19.5	
4 <i>The Simpsons</i>	FOX	Animation	18.1	
5 <i>Succession</i>	HBO	Drama	17.3	
6 <i>La Academia</i>	TV Azteca	Reality	17.3	
7 <i>El Corazón Nunca Se Equivoca</i>	Las Estrellas	Drama	17.1	
8 <i>Ventaneando</i>	TV Azteca	Variety	16.9	
9 <i>Como Dice El Dicho</i>	Las Estrellas	Drama	16.5	
10 <i>La Familia P. Luche</i>	Las Estrellas	Comedy	15.5	
11 <i>La Usurpadora</i>	Las Estrellas	Drama	15.2	
12 <i>Spongebob Squarepants</i>	Nickelodeon	Children	14.8	
13 <i>Ted Lasso</i>	Apple TV+	Comedy	14.6	
14 <i>The Owl House</i>	Disney Channel	Children	14.3	
15 <i>La Casa De Los Famosos Mexico</i>	Las Estrellas	Reality	14.2	
16 <i>Vecinos (MX)</i>	Las Estrellas	Comedy	14.2	
17 <i>El Payaso Plim Plim: Un Héroe Del Corazón</i>	Disney Junior	Children	14.1	
18 <i>One Piece</i>	Fuji Television Network	Animation	14.0	
19 <i>Masha And The Bear</i>	Russia-1	Children	13.6	
20 <i>The Last Of Us</i>	HBO	Drama	13.3	

A selection of 5 additional series of interest:

24 <i>Tierra De Esperanza</i>	Las Estrellas	Drama	12.3	
32 <i>Shark Tank México</i>	Sony Channel	Reality	11.0	
40 <i>Tengo Talento, Mucho Talento</i>	Estrella TV	Reality	10.2	
54 <i>Cleo & Cuquin</i>	Discovery Kids Latin America	Children	9.2	
59 <i>Reto 4 Elementos</i>	RTS	Reality	8.7	

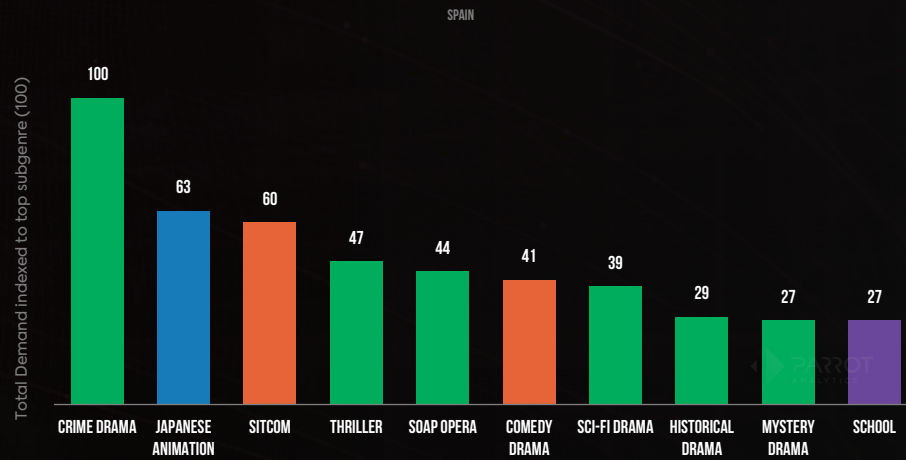
Spain Genre and Subgenre Preferences for Series

Genre demand share for all series in Q2 2023



- 44.8% of demand for shows in Spain in Q2 was for a drama series, making Spain the most drama-loving market in this report.
- The share of demand for children's series in Spain (6.5%) was notably smaller than the share of demand for kids' content in Latin American markets in this report.
- Spain was the only market in this report where less than 10% of demand for shows was for the animation genre,

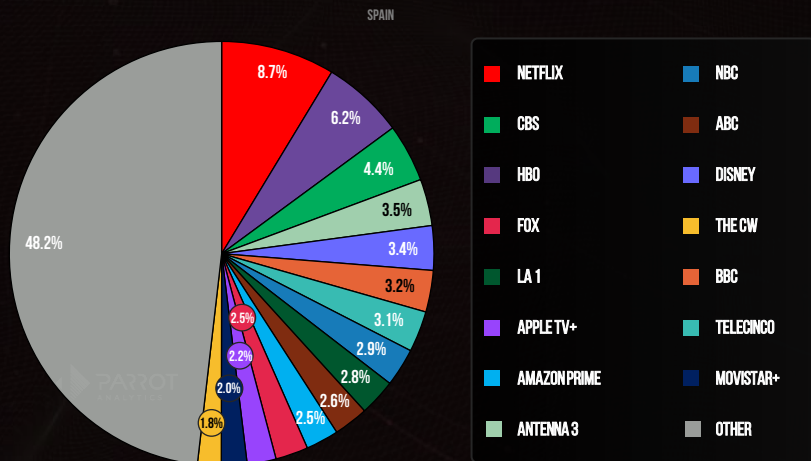
The 10 most in-demand subgenres across all series in Q2 2023



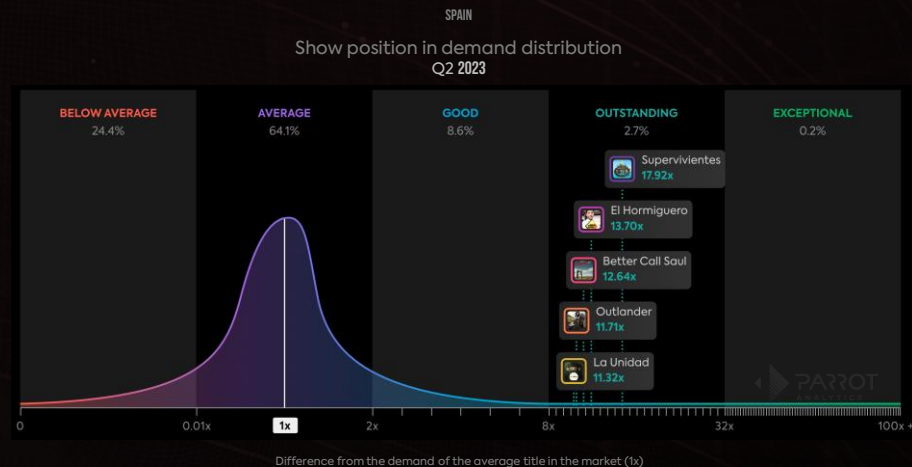
- Crime drama ranked as the most in-demand subgenre in Spain for the quarter by a wide margin.
- Six of the ten most in-demand subgenres in Spain were drama subgenres, underscoring the popularity of drama content generally in this market.
- The school-age subgenre of children's content ranked as the tenth most in-demand subgenre in Spain for the quarter. This was a lower ranking for this subgenre than in any of the Latin American markets in this report.

Spain Originals Share of Demand and Demand Distribution

Market demand share by original platform for all series



Demand distribution of a selection of top series



- Netflix originals accounted for the largest share of demand in Spain in Q2. 8.7% of demand for all shows in Spain was for a Netflix original. This was also the largest share of demand for Netflix in this report.
- HBO and HBO Max content accounted for the second largest share of demand in Spain. The 6.2% of Spanish demand for these series was the largest share of demand for HBO across markets in this report.
- Shows from the local Spanish channel Antenna 3 accounted for 3.5% of demand in Spain this quarter, a larger share of demand than for all shows from a Disney branded channel or platform.

- *Supervivientes*, the local Spanish version of the Survivor franchise, ranked as the 8th most in-demand series in Spain for the quarter with 17.9 times the average series demand.
- *Outlander*, the historical drama from Starz, ranked higher in Spain than in any other market in this report and had 11.7 times the average series demand.
- Spanish Thriller series, *La Unidad*, from Movistar+ ranked higher in Spain than in any other market in this report. It had 11.3 times the average series demand for the quarter.

Top Series in Spain

The top 20 most in-demand series:

SERIES NAME	ORIGINAL PLATFORM	GENRE	DIFFERENCE FROM AVERAGE TITLE (1X) IN Q2 2023	
1 <i>El Chiringuito De Jugones</i>	Factual	Mega	23.5	
2 <i>The Mandalorian</i>	Action and Adventure	Disney+	23.0	
3 <i>Succession</i>	Drama	HBO	22.1	
4 <i>Stranger Things</i>	Drama	Netflix	18.8	
5 <i>Game Of Thrones</i>	Drama	HBO	18.6	
6 <i>Sálvame</i>	Factual	Telecinco	18.5	
7 <i>Ted Lasso</i>	Comedy	Apple TV+	18.2	
8 <i>Supervivientes</i>	Reality	Telecinco	17.9	
9 <i>One Piece</i>	Animation	Fuji TV	17.2	
10 <i>Money Heist (La Casa De Papel)</i>	Drama	Netflix	16.9	
11 <i>The Last Of Us</i>	Drama	HBO	16.3	
12 <i>30 Coins (30 Monedas)</i>	Horror	HBO	16.2	
13 <i>The Owl House</i>	Children	Disney Channel	15.6	
14 <i>The Simpsons</i>	Animation	FOX	15.4	
15 <i>Pátria</i>	Drama	HBO	15.4	
16 <i>Veneno. Vida Y Muerte De Un Icono</i>	Drama	ATRESPlayer	15.3	
17 <i>La Que Se Avecina</i>	Comedy	Telecinco	13.9	
18 <i>South Park</i>	Animation	Comedy Central	13.8	
19 <i>Got Talent España</i>	Reality	Telecinco	13.8	
20 <i>El Hormiguero</i>	Variety	Cuatro	13.7	

A selection of 5 additional series of interest:

22 <i>The Walking Dead</i>	AMC	Drama	13.3	
32 <i>House Of The Dragon</i>	HBO	Drama	12.4	
38 <i>Grey's Anatomy</i>	ABC	Drama	11.9	
40 <i>Outlander</i>	Starz	Drama	11.7	
42 <i>La Unidad</i>	Movistar+	Drama	11.3	



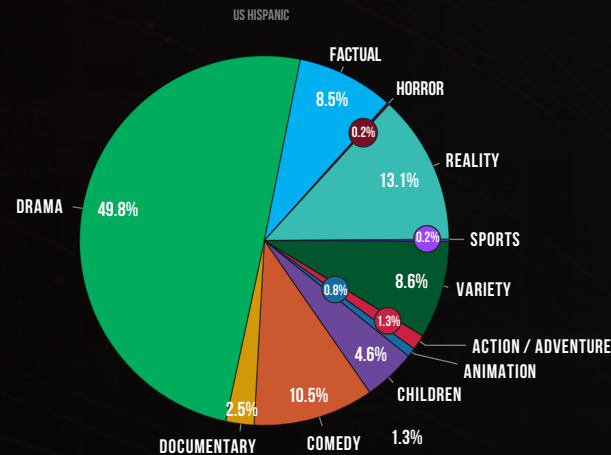
Spanish Language Content trends in the US

Total US Demand for Spanish Language Series, Indexed to total demand in Jan 2021 (=100)



- There has been growing demand in the US for Spanish language shows over the past several years.
- The total US demand for Spanish language shows was fairly stable for most of 2021. However, demand saw strong growth in 2022 and more recently at the beginning of 2023.
- As of June 2023, total US demand for Spanish language series was 37% higher than it was in January 2021.

Share of US Demand for Spanish language series by genre (Q2 2023)



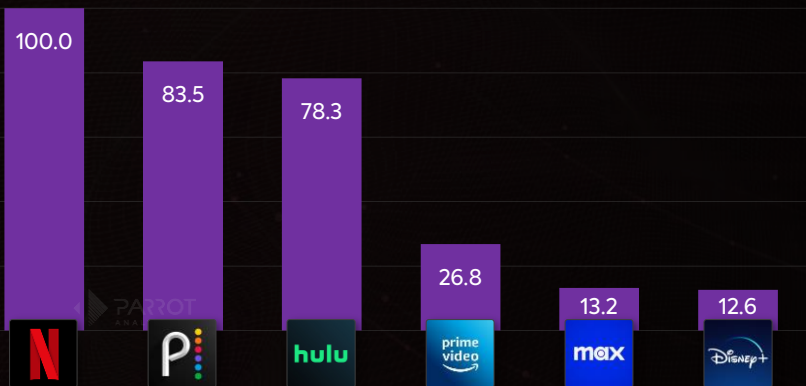
- Nearly 50% of US demand for Spanish language series was for a drama series. This is a larger share of demand for this genre compared to the overall share of US demand for dramas in any language (27.5%).
- Spanish language factual content in the US accounted for 8.5% of demand for all Spanish language series. Popular news programs like *Noticias Telemundo* helped drive high demand for the genre.
- The reality genre made up the second largest share of US demand for Spanish language series. 13.1% of demand for all Spanish language series was for a reality series.



On-Platform Demand for Spanish Language Series

Total Demand for Spanish Language Series Available on US SVODs
US, Q2 2023, Indexed to Netflix (=100)

US HISPANIC



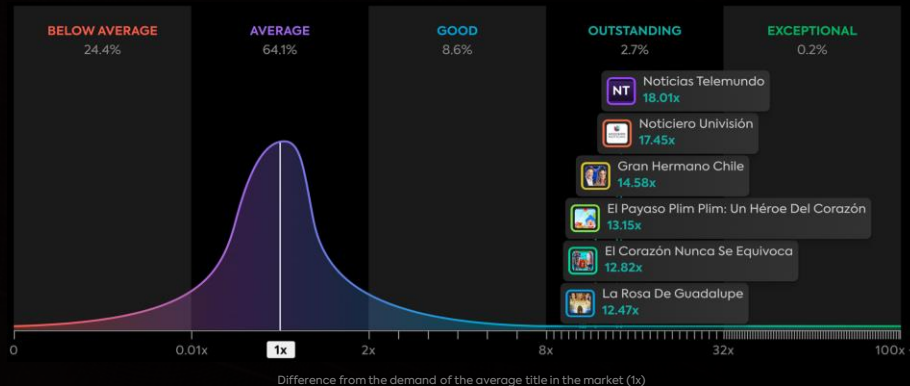
- Netflix had the most demand for Spanish language series available on its platform in the US. A number of Spanish dramas from the platform such as *La Casa de Papel* reached high levels of demand globally.
- Peacock ranked as the SVOD with the second highest demand for on-platform Spanish language series in the US, drawing on its catalog of Telemundo content.
- Hulu ranked as the platform with the third highest demand for its available Spanish language content in the US – 22% lower than Netflix. After Hulu, other platforms in the US had significantly less demand for their Spanish series.

Popular Spanish Language Series in the US

Most in-demand Spanish language series US (Q2 2023)

US HISPANIC

Show position in demand distribution
Q2 2023



- Two Spanish language news programs topped the ranking of most in-demand Spanish language series in the US – *Noticias Telemundo* and *Noticiero Univision*.
- A new reality series from the Big Brother franchise was the third most in-demand Spanish language show in the US in Q2. *Gran Hermano Chile* had nearly 15 times the average series demand in the US for the quarter.
- Two Mexican dramas ranked in the top six most in-demand Spanish language series in the US in Q2 – *El Corazón Nunca se Equivoca* and *La Rosa de Guadalupe*.



Most in-demand Spanish Language Series in the United States

The top 20 most in-demand series:

SERIES NAME	ORIGINAL PLATFORM	GENRE	DIFFERENCE FROM AVERAGE TITLE (1X) IN Q2 2023
1 <i>Noticias Telemundo</i>	Telemundo	Factual	18.0
2 <i>Noticiero Univisión</i>	Univision	Factual	17.5
3 <i>Gran Hermano Chile</i>	Chilevisión	Reality	14.6
4 <i>El Payaso Plim Plim: Un Héroe Del Corazón</i>	Disney Junior	Children	13.1
5 <i>El Corazón Nunca Se Equivoca</i>	Las Estrellas	Drama	12.8
6 <i>La Rosa De Guadalupe</i>	Las Estrellas	Drama	12.5
7 <i>Caso Cerrado</i>	Telemundo	Reality	12.4
8 <i>El Señor De Los Cielos</i>	Telemundo	Drama	11.6
9 <i>La Academia</i>	TV Azteca	Reality	11.0
10 <i>Money Heist (La Casa De Papel)</i>	Netflix	Drama	10.7
11 <i>Como Dice El Dicho</i>	Las Estrellas	Drama	9.7
12 <i>La Usurpadora</i>	Las Estrellas	Drama	9.6
13 <i>Tengo Talento, Mucho Talento</i>	Estrella TV	Reality	9.3
14 <i>El Chiringuito De Jugones</i>	Mega	Factual	9.3
15 <i>La Dama De Troya</i>	RCN Televisión	Drama	8.5
16 <i>Cleo & Cuquin</i>	Discovery Kids Latin America	Children	8.1
17 <i>Al Rojo Vivo</i>	Telemundo	Factual	8.0
18 <i>El Gordo Y La Flaca</i>	Las Estrellas	Variety	7.6
19 <i>Vecinos (MX)</i>	Las Estrellas	Comedy	6.5
20 <i>La Casa De Los Famosos Mexico</i>	Las Estrellas	Reality	5.9

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.



NETFLIX

prime video

hulu

peacock

HE

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".

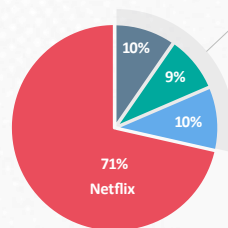
Because our global demand measurement system incorporates multiple country-specific content demand signals, we are able to gauge popularity for TV content long before a series, or platform, is officially released in its home market, or any other market.

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](#).

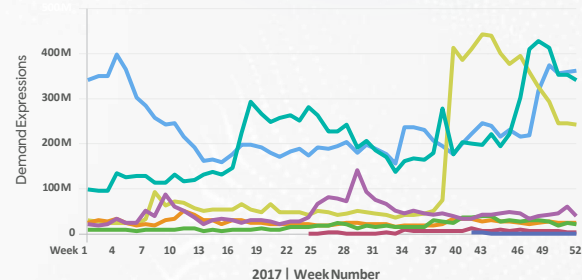
Total share of demand for platforms in 2017



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

Amazon
Video Hulu
CBS All Access
Crackle
Facebook
Apple Music
Seeso
YouTubePremium

Total platform demand in 2017 (ex. Netflix)

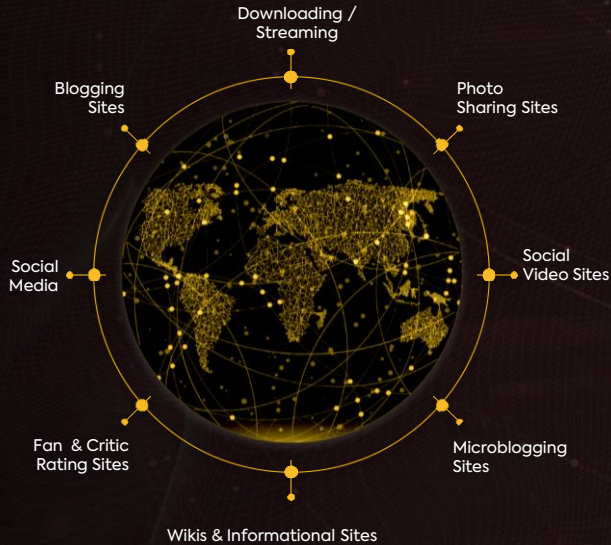


THE STANDARD FOR GLOBAL AUDIENCE DEMAND MEASUREMENT

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:

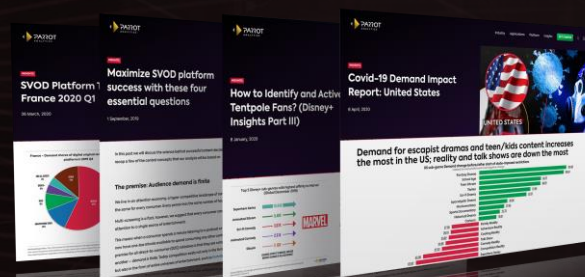


DEMAND360 LITE

Rank	TV Shows	Average Demand	Change in Rank	Gender	Generation	Year	Original Network	Origin
1	Adventure Time	78.46x EXCEPTIONAL	0 =	50.9% FEMALE	50.9% GEN Z	2010	Cartoon Network	US
2	Ahsoka	69.39x EXCEPTIONAL	+1 A	69.8% MALE	34.4% MILLENNIALS	2023	Disney+	US
3	Spongebob Squarepants	64.4x EXCEPTIONAL	0 =	55.8% FEMALE	50.6% ZENITHALS	1999	Nickelodeon	US
4	Game Of Thrones	61.24x EXCEPTIONAL	0 =	50.4% MALE	39.2% ZENITHALS	2011	HBO	US
5	The Simpsons	59.7x EXCEPTIONAL	-1 B	60.7% MALE	34.7% MILLENNIALS	1989	FOX	US
6	Sesame Street	55.45x EXCEPTIONAL	+2 A	58% FEMALE	33.6% GEN X	1969	FBS	US
7	One Piece	53.69x EXCEPTIONAL	+6 A	72.5% MALE	49.2% GEN Z	2023	Netflix	US
8	My Hero Academia	50.93x EXCEPTIONAL	+1 A	63.2% MALE	65.6% GEN Z	2016	YTV	JP
9	The Walking Dead	50.83x EXCEPTIONAL	+4 B	50.7% MALE	28.9% MILLENNIALS	2010	AHC	US
10	Stranger Things	50.27x EXCEPTIONAL	+1 A	57.2% FEMALE	32.2% GEN Z	2016	Netflix	US
11	South Park	47.22x EXCEPTIONAL	+1 A	65.5% MALE	29.7% MILLENNIALS	1997	Comedy Central	US
12	The Wheel Of Time	46.59x EXCEPTIONAL	0 =	60% MALE	36.4% GEN X	2021	Amazon Prime Video	US

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PARROT

ANALYTICS



Los Angeles, US ^{HQ}
750 N San Vicente Blvd
West Hollywood, CA 90069



Auckland, NZ
20 Augustus Terrace
Parnell, 1052



New York, US
12 East 49th St.
11th Floor NY 10017



London, UK
16 Great Chapel St
London, W1F 8FL



Sao Paulo, BR
Av. Paulista, 2537
SP 01311-300