



Latin America – January – May 2021

Battle Studies:

News from the Frontlines of the Streaming Wars in Latin America



SPECIAL REPORT



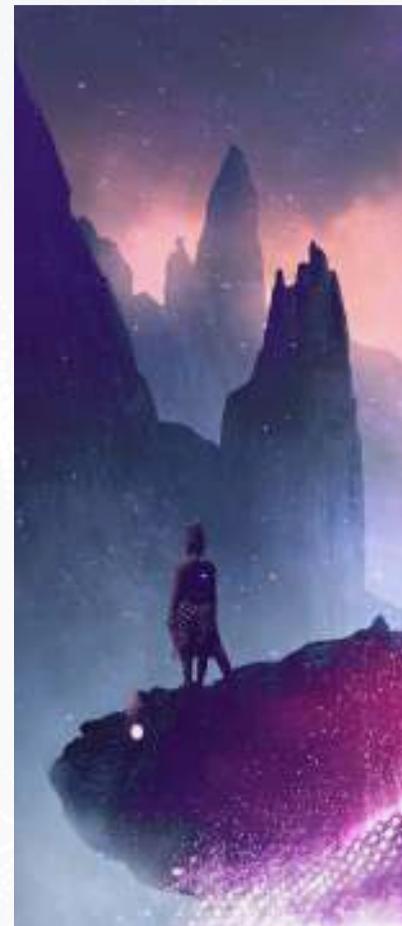
Amidst a rapidly changing world, the TV industry has continued to fragment. A growing number of platforms are competing for audience attention that continues to be stretched.

In this competitive landscape, understanding what audiences want has never been more challenging, but the potential rewards have never been greater.

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 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
Director of Applied Analytics
Parrot Analytics

Argentina

Originals from Apple TV+ have found fans in Argentina. The platform's originals account for 7.8% share of the market for digital originals.

Brazil

Original content from Hulu has succeeded in Brazil. These series make up 10.2% of the market demand for digital originals, a larger share than any other market in this report.



RETHINKING THE TV BUSINESS

Chile

Chileans have the greatest demand for action/adventure content in the region. Disney+ has benefitted from this and achieved its largest share of demand here of the countries in this report.

Colombia

Columbian audiences have high demand for children's content. The share of demand for these types of shows is +86% higher than the global average share of demand.

Mexico

Mexican audiences have some of the highest demand for animated content in the region. This market's 11.3% demand share for animation is +33% above the global average for this genre.

US Hispanic

Hispanic documentaries are resonating with Americans relative to audiences in LATAM, while comedies and variety series have a harder time gaining traction in the US market.



CONCEPT TESTING: CRAFTING CONTENT FOR SUCCESS IN LATAM

“ Our concept testing framework reveals the impact of different elements of a show in the earliest stages. In this way we can maximize the ultimate resonance with audiences in a data driven way. ”



René Rosado González

Partner Insights

Parrot Analytics

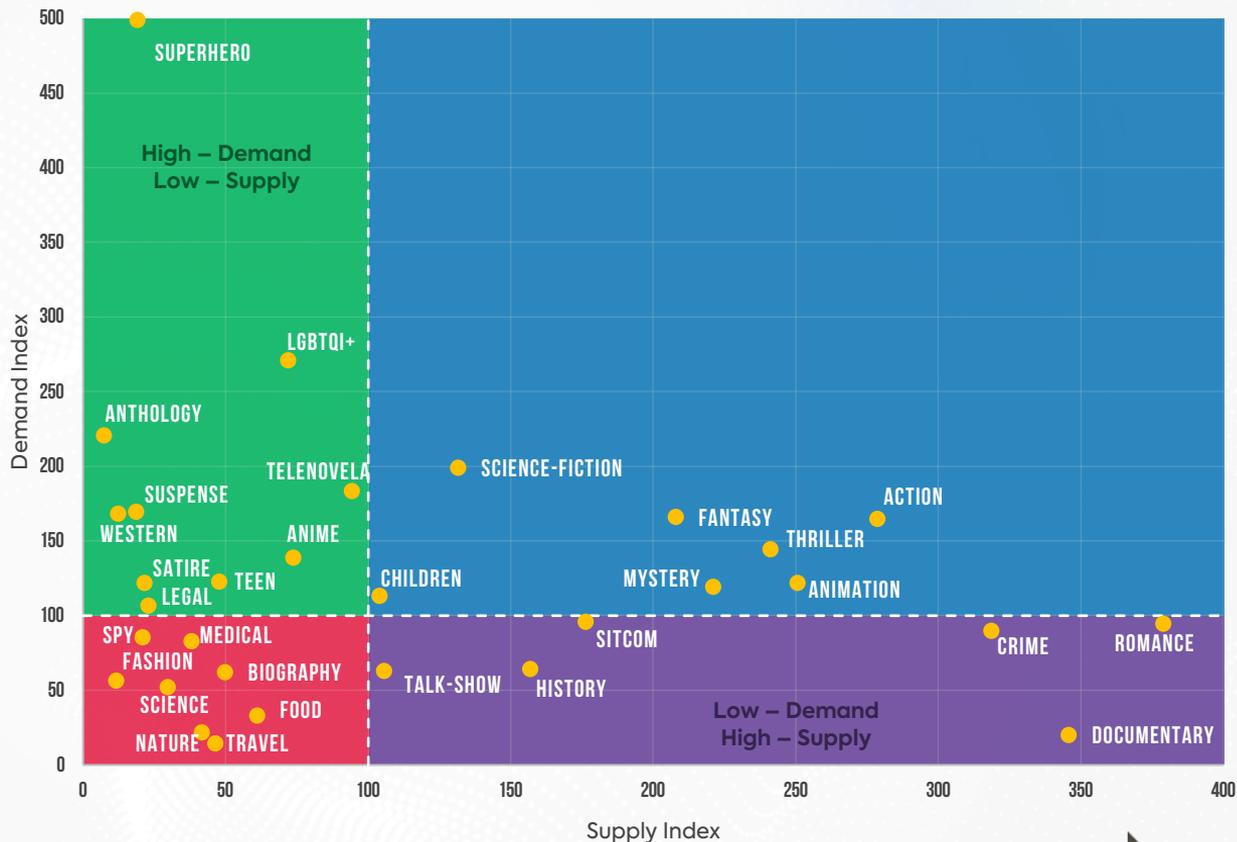


WHERE IS THERE WHITESPACE OPPORTUNITY IN LATIN AMERICA? JANUARY – MAY 2021

Superhero series, while often expensive to make, stand apart as one of the most highly demanded, but undersupplied types of content. Anthology format series, anime, telenovelas, and shows with LGBTQ themes are all high demand categories with fewer than the average number of titles that are potential growth areas.

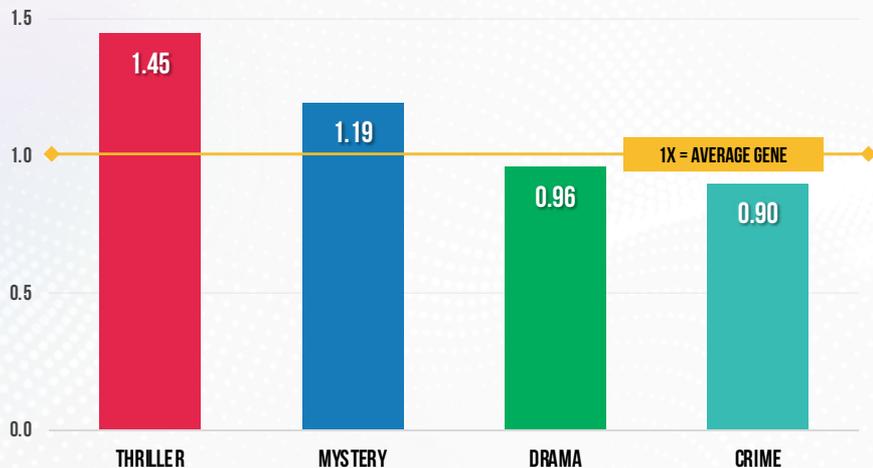
Science fiction, although it has more titles than the average genre, still has twice the demand so can support more titles.

Documentaries of all varieties – travel, nature, science, biography, etc. – underperform in Latin America.



THE GENOME OF A SUCCESSFUL SERIES

Who Killed Sara? Demand for selected core genes



When analyzing the microgenre composition of this Mexican series, we see that the average demand for each microgenre individually is close to the average. The success behind *Who killed Sara?* lies behind the interaction of these individual elements with each other and with other external factors like the cultural and social context of every market.

Who Killed Sara? 30 days post-release demand

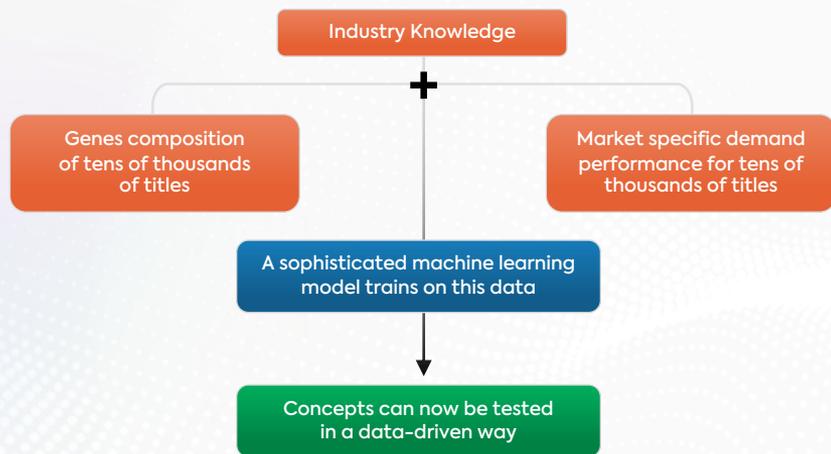


Difference from the demand of the average title in the market (1x)

Netflix original series *Who killed Sara?* generated 28.6 times more demand than the average show in Mexico. It not only reached a performance in its home market that only 2.7% of the shows have, but also had a good performance across other markets like Spain and the United States.

FORECASTING TV SERIES SUCCESS

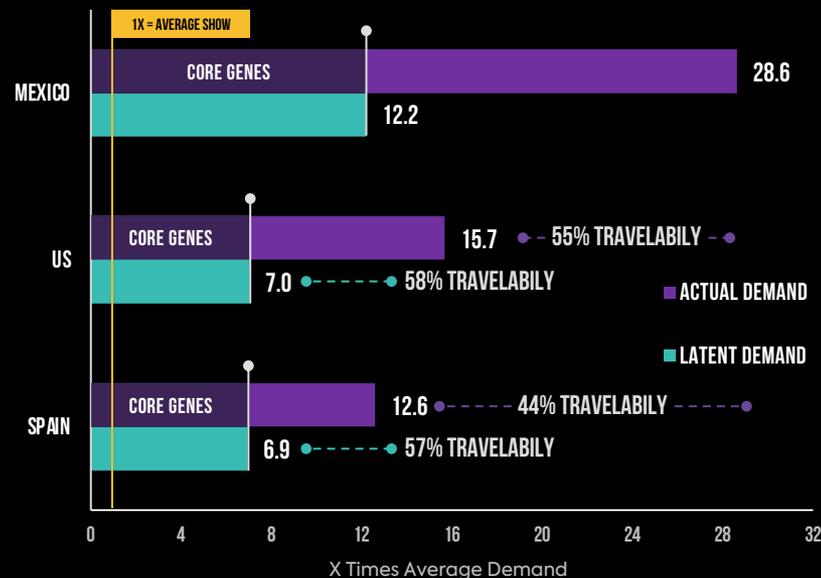
Who Killed Sara? Latent demand forecast



Parrot Analytics' Recipe for Success.

With infinite possible combinations of genes, how can we select the one with the highest probability of success? Parrot Analytics has developed an analytical framework that leverages the Content Genome of tens of thousands of shows in order to predict the demand for a concept across any market and any platform. This way, concepts can now be tested in a data-driven way.

Who Killed Sara? 30 days post-release demand



Isolating only four core genes highlighted above (Thriller, Mystery, Drama, and Crime), our concept testing model set the floor of its 30 days post-release at 12.2 times more demand than average in its home market and a score of 58% of travelability to international markets like the US and Spain. These predictive results imply that the adding all other internal (production quality, casting, etc) and external factors (marketing, release strategies, etc) added additional performance boosts that elevated the show to a higher observed popularity across all territories.

TALENT DEMAND: FINDING THE RIGHT TALENT TO ENGAGE LATAM AUDIENCES

“ Talent is a key ingredient for activating audiences. Strategically placed talent can unlock fanbases and drive greater engagement with content. ”



Karine Kakazu
Partner Insights
Parrot Analytics



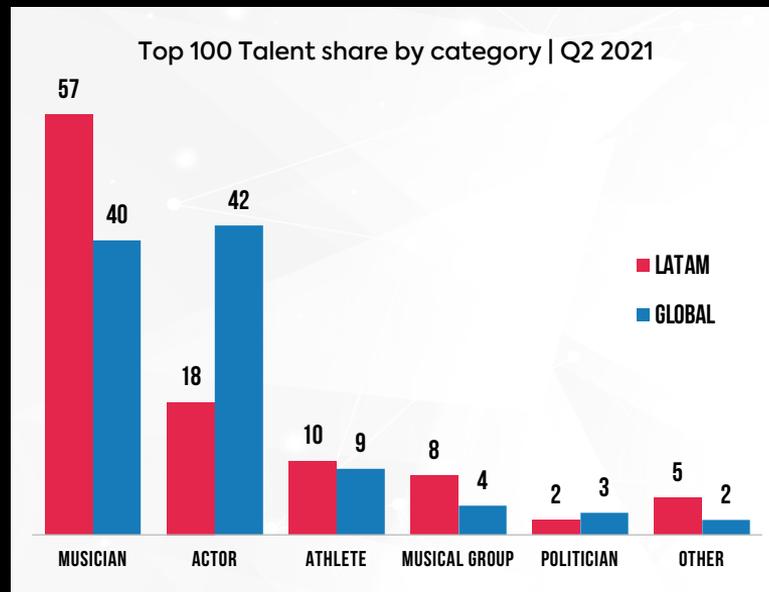
WHAT TALENT HOLDS THE KEY?

Understanding the top talent in the region is essential to be able to better engage audiences and connect with local targets.



HOW TO ACTIVATE THE AUDIENCE WITH TALENT

By understanding talent, it is possible to select the ideal casting, develop marketing campaigns, actions with influencers, and develop biographical productions and documentaries of personalities.



THE MUSIC REGION

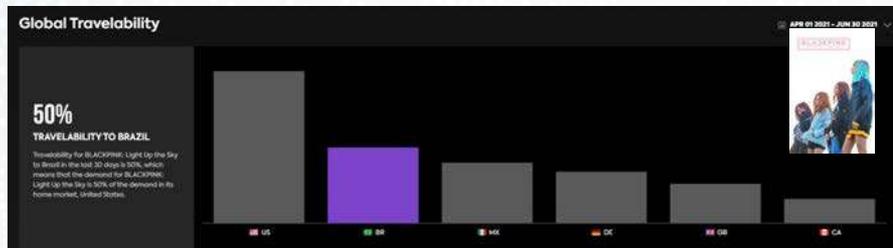
In Latin America, most of the top talent consists of musicians. They represent a 43% larger share among the most in demand talent in Latin America compared to the global average. Additionally, the region has twice as many musical groups in this category. In the global ranking, actors are the top talent category of the 100 most in demand, accounting for 42%.

AND WHAT DOES THIS HAVE TO DO WITH THE STREAMING WARS? EVERYTHING!

Some players already understand the importance of talent and have produced documentaries or TV series with hotly demanded talent - especially musicians. Entertainment goes beyond local and format barriers, such as the Korean boy band BTS, which is a global phenomenon and has already featured in a documentary film.



The Korean girl group Blackpink also has a documentary with high travelability to Brazil and Mexico.



There are also artists from the region among the most in demand who have had their own documentaries produced for streaming platforms such as Maluma, J Balvin, and Anitta.

THE TOP 20 MOST IN-DEMAND MUSIC TALENT IN LATAM | Q2 2021

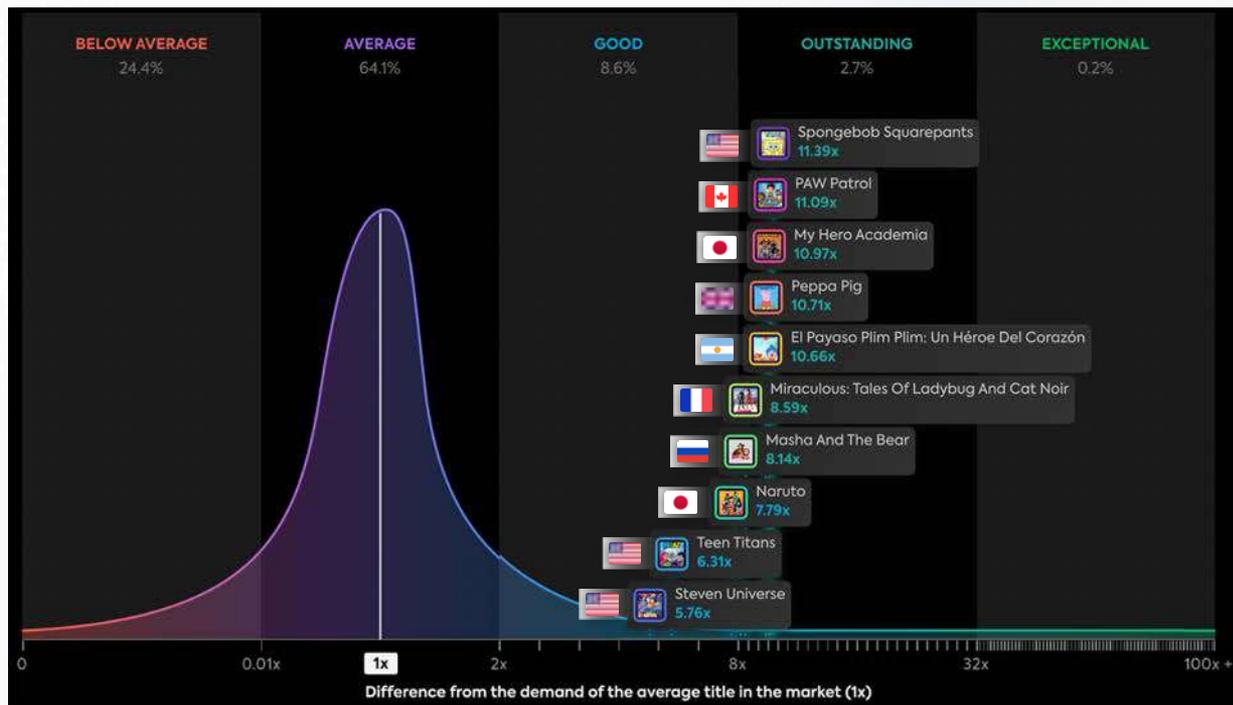
	TALENT	COUNTRY
1	BTS	KR
2	Blackpink	KR
3	Harry Styles	GB
4	Louis Tomlinson	GB
5	Taylor Swift	US
6	Exo	KR
7	Bad Bunny	PR
8	Ariana Grande	US
9	Maluma	CO
10	Dua Lipa	GB
11	Lady Gaga	US
12	Fuego	US
13	Justin Bieber	CA
14	J Balvin	CO
15	Shakira Ripoll	CO
16	Cnco	US
17	Anitta	BR
18	Enrique Iglesias	ES
19	Karol G	CO
20	Madonna	US

LATAM IS A FERTILE GROUND FOR KID'S CONTENT CONSUMPTION

Most In-Demand Children's Shows in LATAM (Jan – May 2021)

LATAM audiences give a larger share of attention to children's series than global audiences do.

Interestingly, the most in-demand kids series in this region come from a wide variety of markets around the world – North American imports like *Spongebob Squarepants* and *PAW Patrol*, Japanese anime, and kids content from a variety of European countries like *Masha and the Bear* from Russia are reaching LATAM audiences.



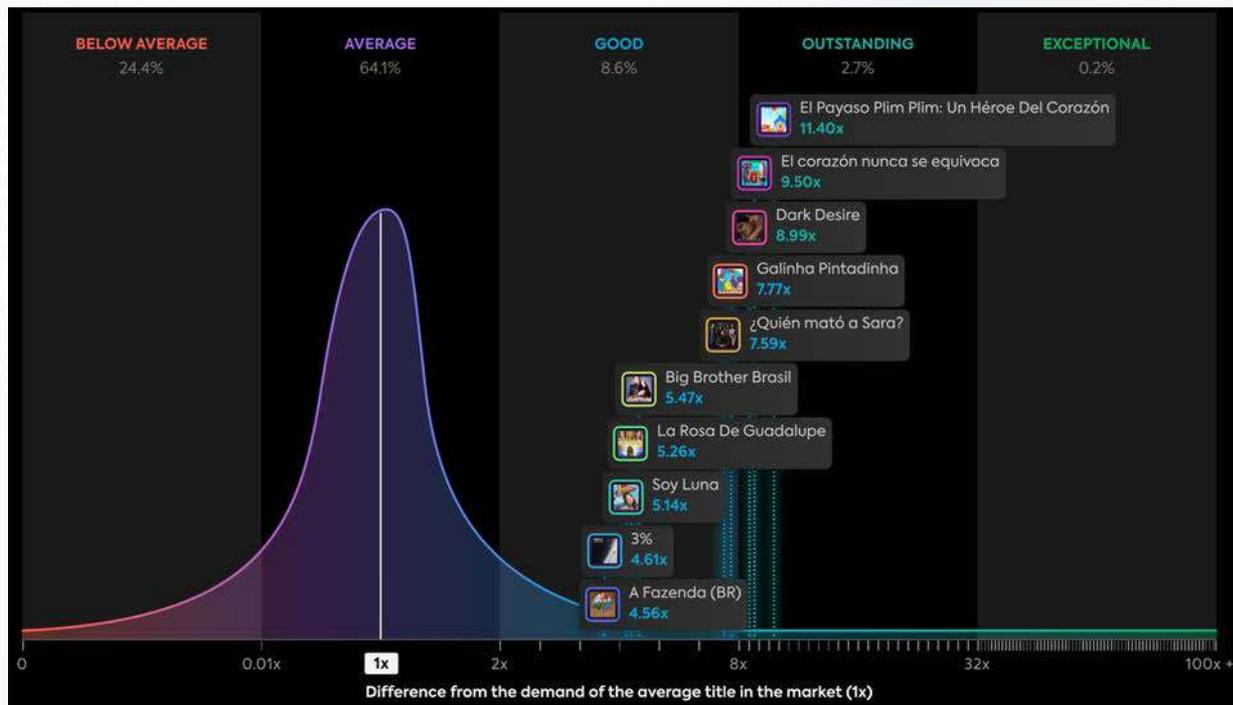
THE REGION IS STARTING TO EXPORT ITS OWN KID'S CONTENT

Not only do audiences in this region love kid's content, but the kids series coming out of the region are some of the most globally popular exports from here.

El Payaso Plim Plim was the most globally popular show originating in LATAM with 11.4 times the average series demand globally in the first 5 months of the year.

While LATAM audiences tend to give less attention to reality series than global consumers, reality series produced here (notably from Brazil) tend to find global success. *A Fazenda* and *Big Brother Brasil* are among the top 10 most globally in-demand exports from LATAM so far this year.

Most Globally Demanded Content from LATAM (Jan – May 2021)





MARKET-SPECIFIC TV CONTENT TRENDS

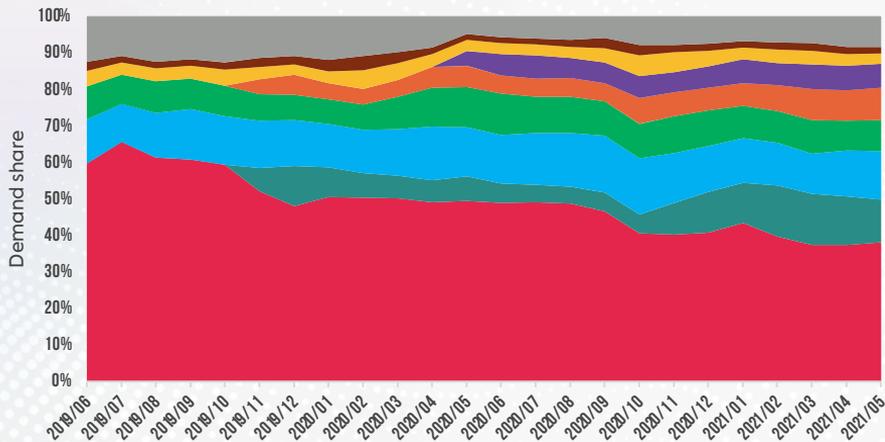
SVOD platform market demand share, genre trends, whitespace opportunities, and top shows

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

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

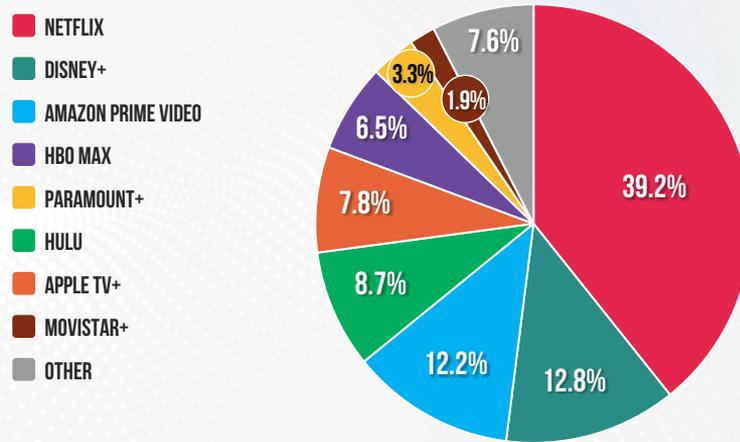
WHICH PLATFORM'S ORIGINALS ARE MOST IN-DEMAND IN ARGENTINA?

Demand shares of digital original series by originating platform over 24 months



- 39.2% of all digital original demand expressed between January and May 2021 is for a Netflix original series, giving Netflix the largest demand share for original content in Argentina.
- However, in Argentina Netflix has the smallest share of demand out of all LATAM markets in this report. This was the only market where its share of demand fell below 40%.

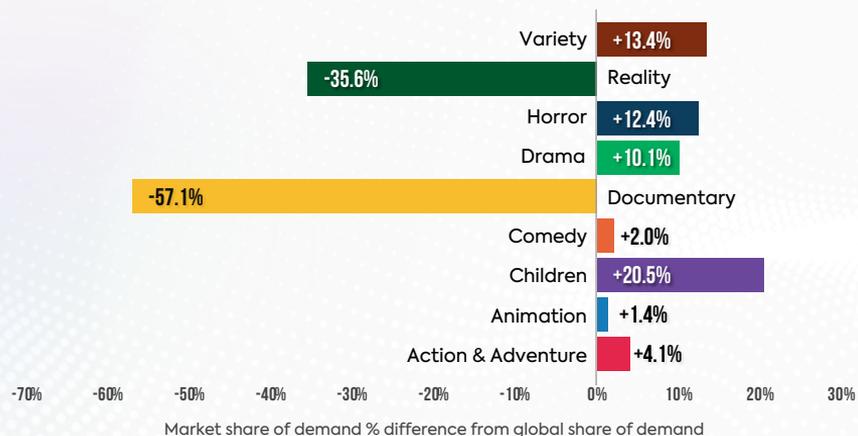
Demand share of digital original series by originating platform, Jan – May 2021



- Strong demand for originals from Amazon Prime Video and Apple TV+ cut into Netflix's demand share in Argentina. These platforms had a larger share of demand in this market than other markets in this report.
- Notably, Apple TV+ has seen strong growth in its demand share here, reaching an 8.8% share of demand and overtaking Hulu's demand share in May 2021.

HOW DO ARGENTINA GENRE PREFERENCES COMPARE TO THE GLOBAL AVERAGE?

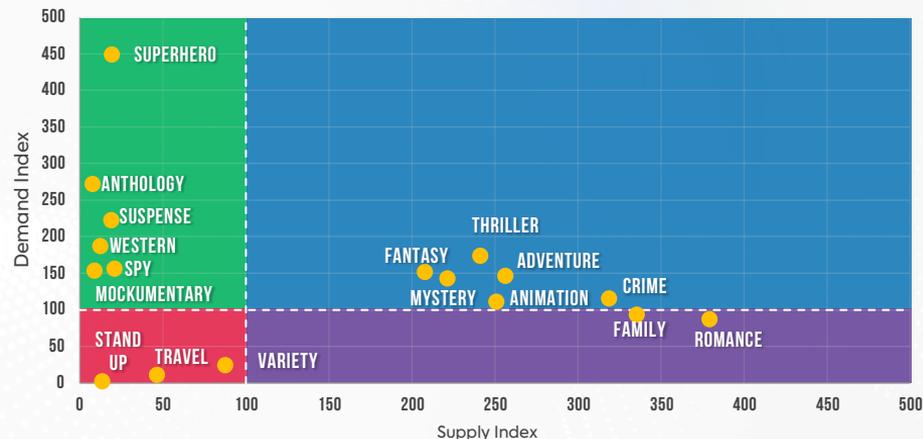
Genre share of demand difference from global average



- To highlight key market specific taste differences, we compare the market share of demand by genre to the global average share.
- Argentine audiences stand out as drama-lovers. This market gives the largest share of demand to dramas of markets in this report which is a 10.1% greater share of demand for this genre than the global average.
- Conversely, Argentina was the market least interested in reality content in this report. Audiences here gave a 35.6% smaller share of demand to this genre compared to the global average.

WHERE ARE THERE WHITESPACE OPPORTUNITIES TO SATISFY DEMAND IN ARGENTINA?

Demand vs Supply indexes for series by microgenre



- This analysis compares the supply of titles with the average demand for a microgenre to reveal opportunities where high demand has yet to be filled.
- As with all the markets we looked at, superhero series and shows with an anthology format are areas of content with well above average demand but low supply.
- Spy themed content stands out as uniquely undersupplied in Argentina while variety content is saturated here. Argentina is the least variety-loving market in this report.



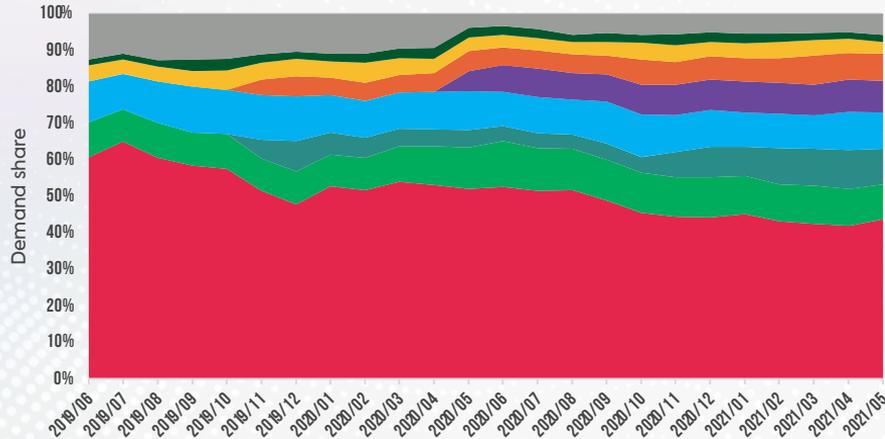
THE TOP 20 MOST IN-DEMAND SERIES IN ARGENTINA

	<i>Series Name</i>	<i>Original Platform</i>	<i>Genre</i>	<i>Difference from Market Average (X times)</i>	
1	WandaVision	Disney+	Action and Adventure	22.8	
2	The Simpsons	FOX	Animation	22.6	
3	Attack On Titan	MBS	Animation	21.2	
4	The Walking Dead	AMC	Drama	18.1	
5	The Mandalorian	Disney+	Action and Adventure	17.9	
6	Game Of Thrones	HBO	Drama	17.3	
7	Cobra Kai	Netflix	Comedy	16.3	
8	Grey's Anatomy	ABC	Drama	14.5	
9	This Is Us	NBC	Drama	14.5	
10	El Payaso Plim Plim: Un Héroe Del Corazón	Disney Junior	Children	13.8	
11	Floricienta	Canal	Comedy	13.8	
12	Outlander	Starz	Drama	13.0	
13	The Boys	Amazon Prime Video	Action and Adventure	12.4	
14	The Good Doctor	ABC	Drama	12.3	
15	Peppa Pig	Channel 5	Children	11.7	
16	Spongebob Squarepants	Nickelodeon	Children	11.5	
17	Showmatch	Canal 9	Reality	11.2	
18	PAW Patrol	TVOKids	Children	11.2	
19	My Hero Academia	YTV	Animation	11.1	
20	Polémica En El Bar	Telefe	Comedy	10.8	



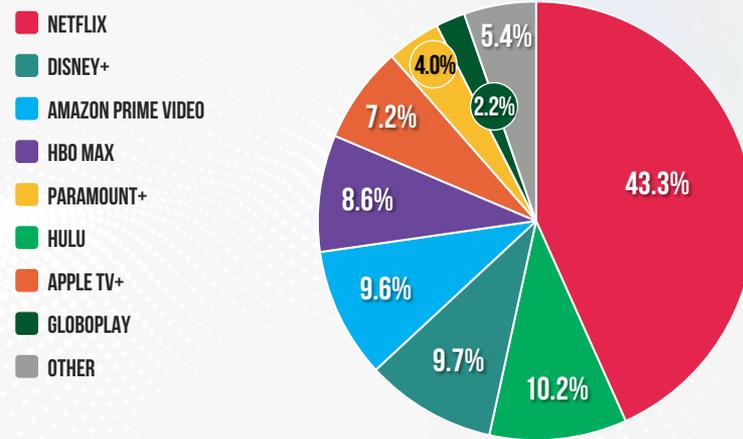
WHICH PLATFORM'S ORIGINALS ARE MOST IN-DEMAND IN BRAZIL?

Demand shares of digital original series by originating platform over 24 months



- Original content from Hulu excels in Brazil, accounting for 10.2% of demand for original content in the first 5 months of 2021, the largest share of markets in this report.
- HBO Max original content also accounts for a larger share of demand in Brazil than other market in this report, with an 8.6% share.

Demand share of digital original series by originating platform, Jan – May 2021

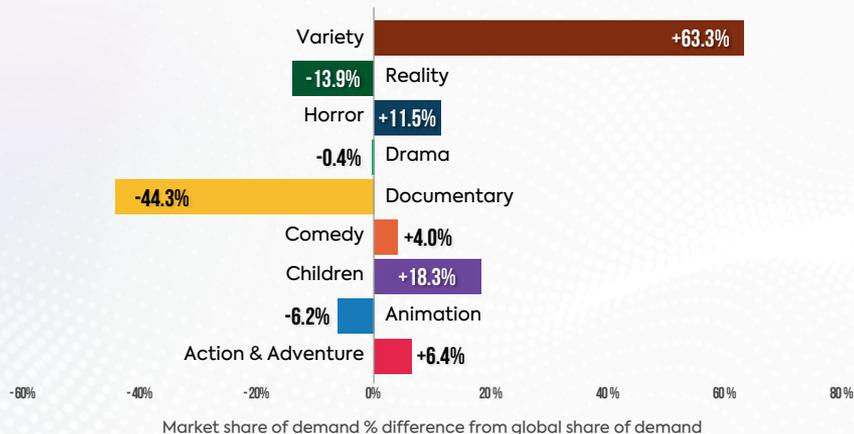


- The share of demand for Disney+ original content is lower in Brazil than elsewhere in LATAM. This was the only market in this report where it fell below a 10% share.
- Local platform GloboPlay has carved out a respectable 2.2% share of demand for its original content in Brazil.



HOW DO BRAZIL GENRE PREFERENCES COMPARE TO THE GLOBAL AVERAGE?

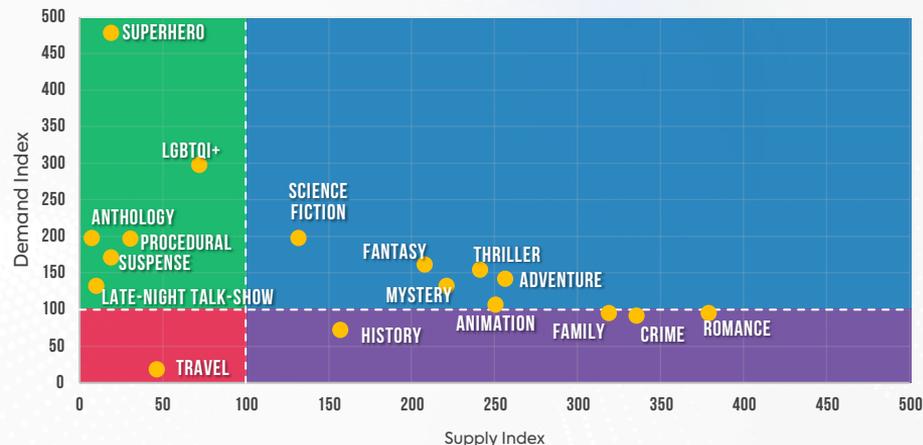
Genre share of demand difference from global average



- Brazil is the only market in this report with a smaller share of demand for animation than the global average.
- All markets we looked at had an above global-average share of demand for variety content, but Brazil stood out as the most variety-loving market with a share of demand for this genre +63.3% larger than the global share.

WHERE ARE THERE WHITESPACE OPPORTUNITIES TO SATISFY DEMAND IN BRAZIL?

Demand vs Supply indexes for series by microgenre



- LGBTQI+ content stands out as notably successful in Brazil with room to grow. This microgenre averaged 3 times the demand of the average microgenre but had a below average number of titles.
- Procedural content also is a notable whitespace opportunity in Brazil, with about twice the average microgenre demand but fewer than half of the titles.



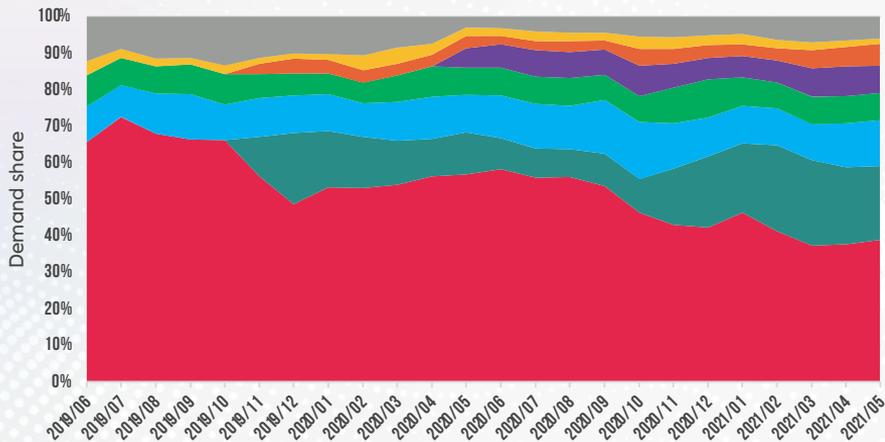
THE TOP 20 MOST IN-DEMAND SERIES IN BRAZIL

Series Name	Original Platform	Genre	Difference from Market Average (X times)
1 Attack On Titan	MBS	Animation	36.3
2 WandaVision	Disney+	Action and Adventure	28.8
3 Grey's Anatomy	ABC	Drama	26.7
4 The Walking Dead	AMC	Drama	25.7
5 Spongebob Squarepants	Nickelodeon	Children	24.6
6 My Hero Academia	YTV	Animation	23.1
7 Game Of Thrones	HBO	Drama	22.8
8 De Férias Com O Ex	MTV Brasil	Reality	21.5
9 Cobra Kai	Netflix	Comedy	21.5
10 Galinha Pintadinha	YouTube	Children	21.1
11 Vai Que Cola	Multishow	Comedy	20.9
12 The Mandalorian	Disney+	Action and Adventure	20.3
13 A Fazenda (BR)	RecordTV	Reality	19.6
14 Friends	NBC	Comedy	19.2
15 Supernatural	The CW	Drama	19.1
16 The Flash	The CW	Action and Adventure	18.7
17 Jornal Da Record	RecordTV	Factual	17.9
18 Peaky Blinders	BBC Two	Drama	17.7
19 Riverdale	The CW	Drama	17.4
20 This Is Us	NBC	Drama	17.4



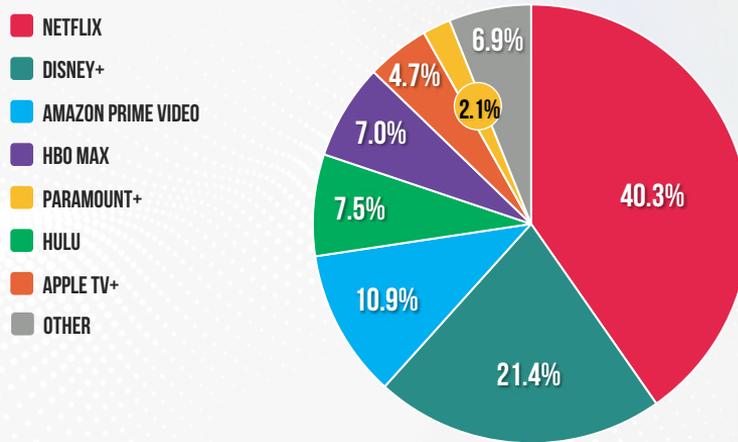
WHICH PLATFORM'S ORIGINALS ARE MOST IN-DEMAND IN CHILE?

Demand shares of digital original series by originating platform over 24 months



- Disney+ has an exceptionally large share of the digital original market in Chile.
- 21.4% of all digital original demand between Jan and May 2021 is for a Disney+ title, nearly twice the next biggest platform share here, Amazon Prime Video.

Demand share of digital original series by originating platform, Jan – May 2021

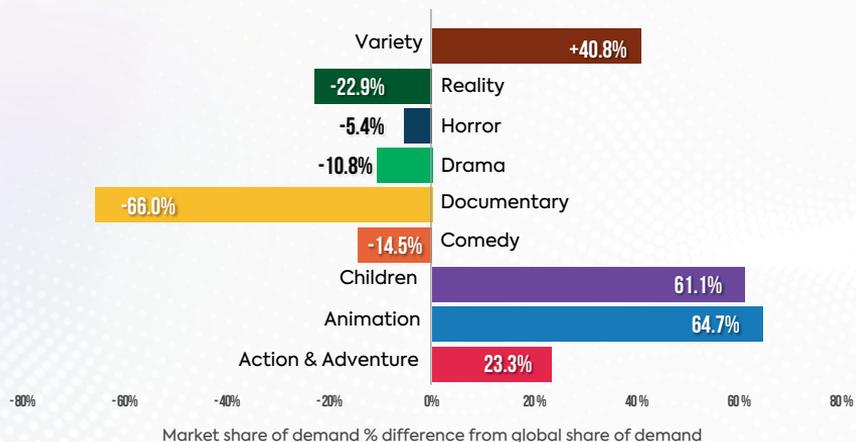


- Netflix's share in Chile, eaten away at by a growing Disney+, averaged a 40.3% share of demand in the first 5 months of the year, but bottomed at a 37% share in March.
- Most platform shares in Chile, squeezed by a dominant Netflix and ascendant Disney+, fell below their LATAM average share. The exception was Amazon Prime whose 10.9% share was above the regional average.



HOW DO CHILE GENRE PREFERENCES COMPARE TO THE GLOBAL AVERAGE?

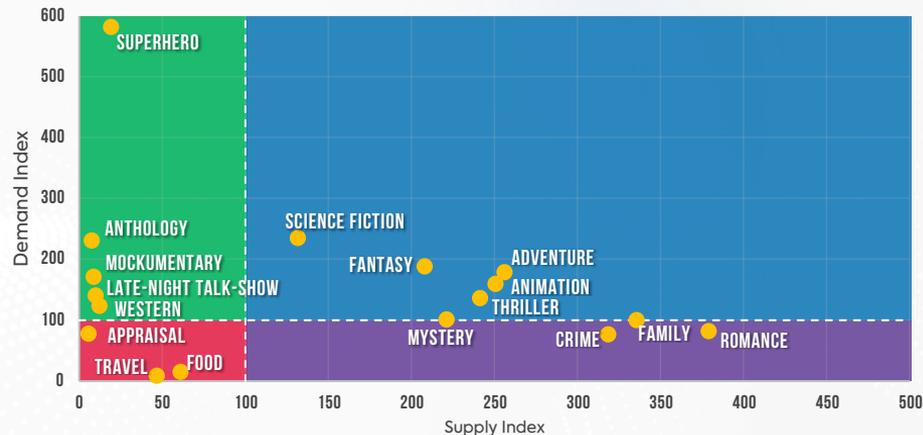
Genre share of demand difference from global average



- Chilean audiences are notable action/adventure fans. Most markets we examined had either slightly above or below the global average demand share for action/adventure content but Chilean’s share of demand for action/adventure content was +23% higher than the global average
- Chile is also the market in this report with the highest share of demand for animated content. The country’s share of demand for this genre was +64.7% larger than the global average.

WHERE ARE THERE WHITESPACE OPPORTUNITIES TO SATISFY DEMAND IN CHILE?

Demand vs Supply indexes for series by microgenre



- In line with Chilean’s love of action/adventure content, the superhero microgenre is particularly in demand in Chile. It had the highest demand index of markets in this report with more than 5.8 times the average microgenre demand.
- The late night talk show microgenre is also an area of opportunity in Chile. While this is a whitespace subgenre in several markets we looked at, the gap between supply and demand is larger here than other markets in this report.



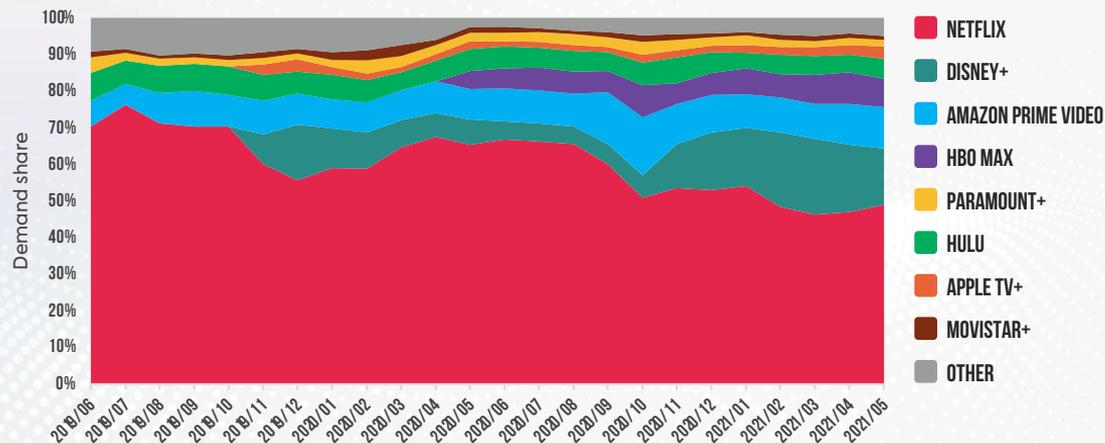
THE TOP 20 MOST IN-DEMAND SERIES IN CHILE

Series Name	Original Platform	Genre	Difference from Market Average (X times)
1 Attack On Titan	MBS	Animation	25.8
2 WandaVision	Disney+	Action and Adventure	20.8
3 The Mandalorian	Disney+	Action and Adventure	19.9
4 The Simpsons	FOX	Animation	14.6
5 Game Of Thrones	HBO	Drama	14.6
6 The Walking Dead	AMC	Drama	14.5
7 Grey's Anatomy	ABC	Drama	13.7
8 My Hero Academia	YTV	Animation	12.9
9 Spongebob Squarepants	Nickelodeon	Children	12.0
10 The Good Doctor	ABC	Drama	11.5
11 Peppa Pig	Channel 5	Children	11.2
12 Yo Soy	Chilevisión	Reality	11.2
13 PAW Patrol	TVOKids	Children	11.1
14 Teletrece	Canal 13	Factual	10.9
15 Morandé Con Compañía	Mega	Comedy	10.8
16 El Payaso Plim Plim: Un Héroe Del Corazón	Disney Junior	Children	10.7
17 Cobra Kai	Netflix	Comedy	9.9
18 The Boys	Amazon Prime Video	Action and Adventure	9.4
19 Festival Viña Del Mar	TVN Chile	Variety	9.4
20 Verdades Ocultas	Mega	Drama	8.8



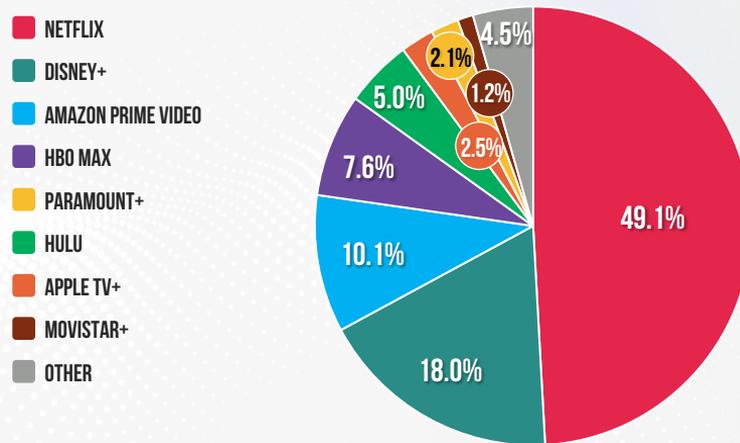
WHICH PLATFORM'S ORIGINALS ARE MOST IN-DEMAND IN COLOMBIA?

Demand shares of digital original series by originating platform over 24 months



- In the first five months of 2021, in Colombia Netflix original series accounted for the largest share of original demand by platform.
- The platform's 49.1% was the largest of LATAM markets in this report and on par with the global average share for the platform, 49.5%.

Demand share of digital original series by originating platform, Jan – May 2021

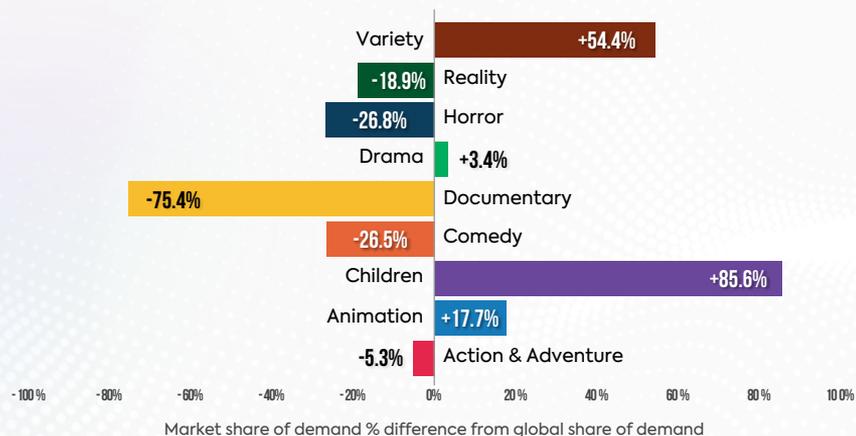


- The 49.1% share of demand for Netflix originals in Colombia is still a far cry from the approximately 60% share of demand it averaged across 2020.
- The 24-month trend shows how the share of demand for Disney+ series exploded from the release of *The Mandalorian* season 2 in October.



HOW DO COLOMBIA GENRE PREFERENCES COMPARE TO THE GLOBAL AVERAGE?

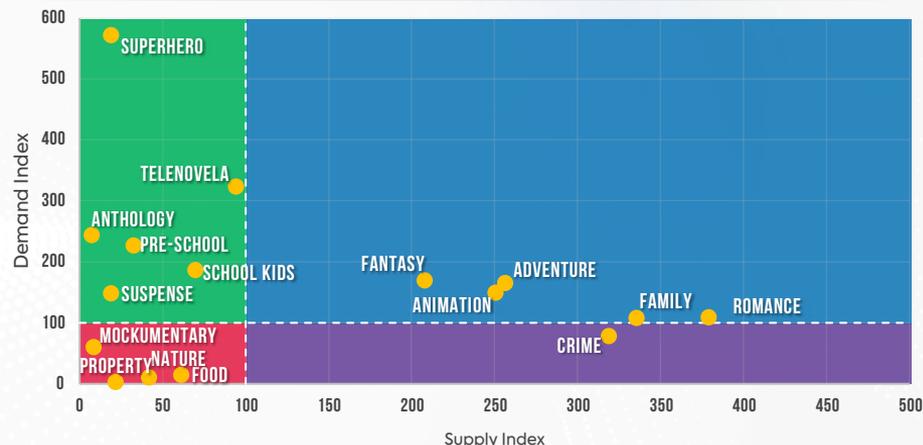
Genre share of demand difference from global average



- Colombians were the biggest fans of children's content in this report, with a share of demand +85.6% larger than the global share of attention for kids' content.
- Colombian audiences were notably averse to the horror and comedy genres with demand shares well below the global average. They gave a meagre 1.4% share of demand to documentaries – the lowest of markets in this report, and -75.4% below the global share of demand for this genre.

WHERE ARE THERE WHITESPACE OPPORTUNITIES TO SATISFY DEMAND IN COLOMBIA?

Demand vs Supply indexes for series by microgenre



- Multiple types of children's content are opportunities in Colombia. Both school-aged and pre-school series have high demand and low supply.
- Telenovelas are also successful in Colombia, with over 3 times the demand of the average microgenre and about the average number of titles.
- While mockumentaries are an opportunity area in many markets, they have below average demand in Colombia, reflecting this market's weaker demand for comedy in general.

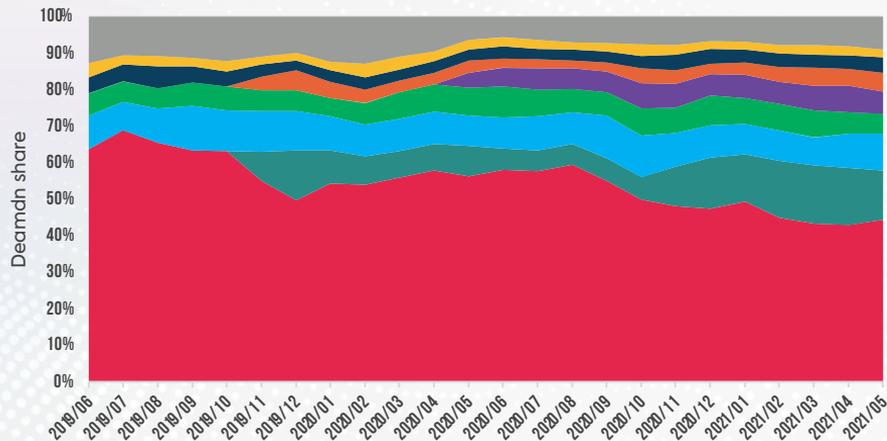


THE TOP 20 MOST IN-DEMAND SERIES IN COLOMBIA

	<i>Series Name</i>	<i>Original Platform</i>	<i>Genre</i>	<i>Difference from Market Average (X times)</i>	
1	WandaVision	Disney+	Action and Adventure	16.4	
2	Game Of Thrones	HBO	Drama	12.3	
3	Attack On Titan	MBS	Animation	12.1	
4	PAW Patrol	TVOKids	Children	10.9	
5	Peppa Pig	Channel 5	Children	10.9	
6	The Simpsons	FOX	Animation	10.8	
7	Pa' Quererte	RCN Televisión	Drama	10.7	
8	Tu Voz Estéreo	Caracol Televisión	Drama	10.5	
9	El Payaso Plim Plim: Un Héroe Del Corazón	Disney Junior	Children	10.3	
10	Spongebob Squarepants	Nickelodeon	Children	10.1	
11	La Rosa De Guadalupe	Las Estrellas	Drama	9.6	
12	Yo Soy Betty, La Fea	RCN Televisión	Drama	9.2	
13	Masha And The Bear	Russia-1	Children	9.0	
14	The Mandalorian	Disney+	Action and Adventure	9.0	
15	Enfermeras	RCN Televisión	Drama	8.1	
16	The Walking Dead	AMC	Drama	8.0	
17	My Hero Academia	YTV	Animation	7.6	
18	Grey's Anatomy	ABC	Drama	7.4	
19	The Boys	Amazon Prime Video	Action and Adventure	7.2	
20	La Voz Kids (CO)	Caracol Televisión	Reality	7.2	

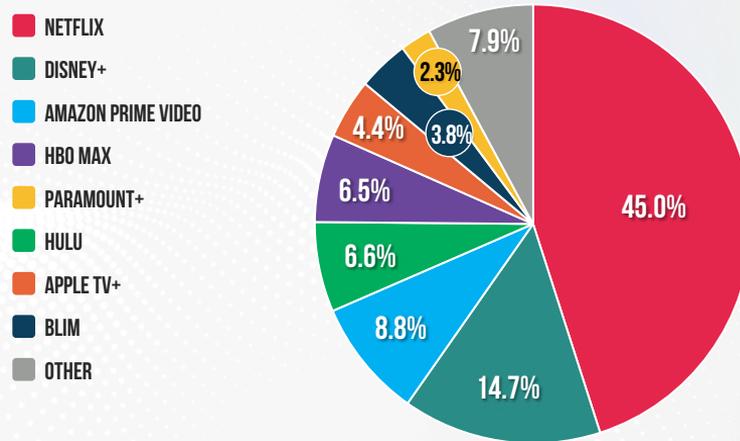
WHICH PLATFORM'S ORIGINALS ARE MOST IN-DEMAND IN MEXICO?

Demand shares of digital original series by originating platform over 24 months



- The 45% share of demand for Netflix originals in Mexico makes this the second most Netflix-loving market in this report behind Colombia.
- However, the share of demand for Netflix originals in Mexico has been on a downward trajectory since August 2020.

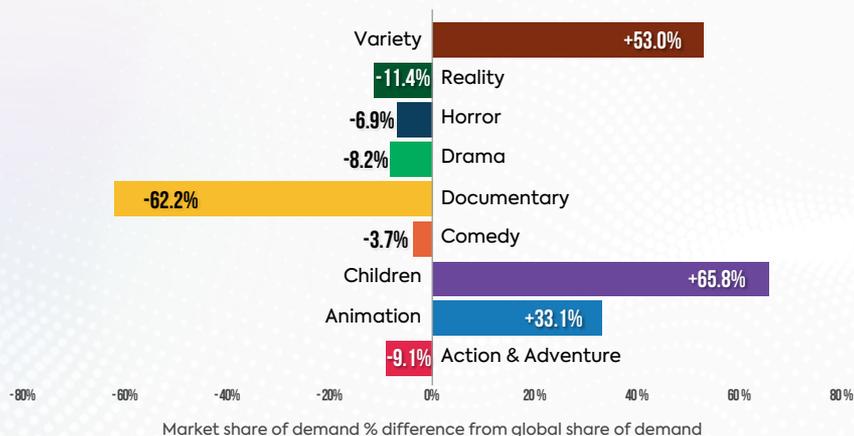
Demand share of digital original series by originating platform, Jan – May 2021



- Mexican audiences gave the smallest share of demand to originals from Amazon Prime Video and HBO Max of markets in this report, with 8.8% and 6.5% respectively.
- Originals from the local platform Blim have performed well in Mexico, capturing 3.8% of demand for digital originals in the first five months of 2021.

HOW DO MEXICO GENRE PREFERENCES COMPARE TO THE GLOBAL AVERAGE?

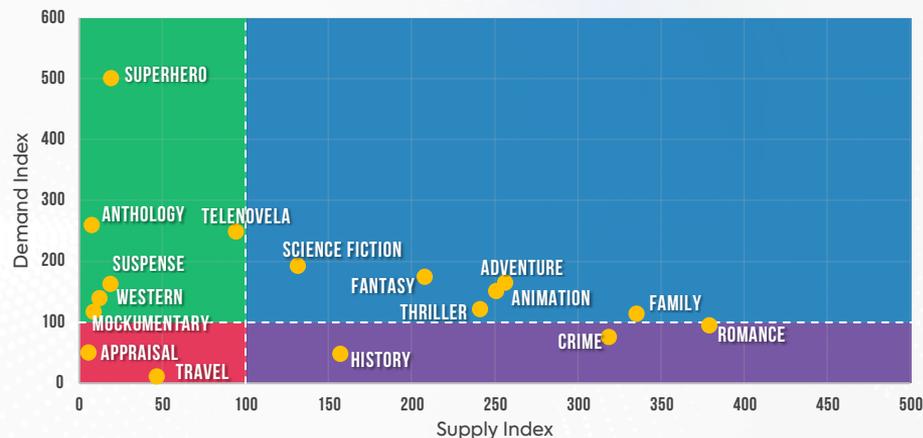
Genre share of demand difference from global average



- Mexican audiences had the smallest share of demand for action/adventure content of the markets we looked at, -9% below the global average share for this genre.
- While the reality genre is less popular across LATAM than it is globally, Mexican audiences were the most receptive to this content of the markets we looked at. The share of demand for reality content in Mexico was -11.4% below the global average but the largest share of markets in this report.

WHERE ARE THERE WHITESPACE OPPORTUNITIES TO SATISFY DEMAND IN MEXICO?

Demand vs Supply indexes for series by microgenre



- As with most markets in this report, the superhero and anthology microgenres are opportunity areas in Mexico.
- History content is notably saturated in Mexico with more than 1.5 times the average microgenre's number of titles but only about half the average demand.



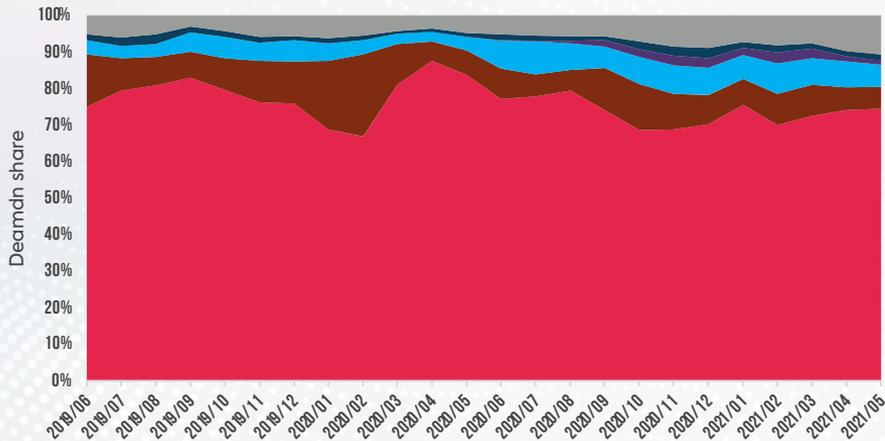
THE TOP 20 MOST IN-DEMAND SERIES IN COLOMBIA

	<i>Series Name</i>	<i>Original Platform</i>	<i>Genre</i>	<i>Difference from Market Average (X times)</i>	
1	WandaVision	Disney+	Action and Adventure	24.4	
2	Attack On Titan	MBS	Animation	23.2	
3	The Mandalorian	Disney+	Action and Adventure	20.5	
4	Spongebob Squarepants	Nickelodeon	Children	17.8	
5	Game Of Thrones	HBO	Drama	16.5	
6	La Rosa De Guadalupe	Las Estrellas	Drama	16.0	
7	The Simpsons	FOX	Animation	15.8	
8	Miraculous: Tales Of Ladybug And Cat Noir	TF1	Children	15.3	
9	My Hero Academia	YTV	Animation	14.9	
10	El corazón nunca se equivoca	Las Estrellas	Drama	14.5	
11	Cobra Kai	Netflix	Comedy	13.5	
12	The Walking Dead	AMC	Drama	13.3	
13	PAW Patrol	TVOKids	Children	12.7	
14	Exatón México	TV Azteca	Reality	11.8	
15	Como Dice El Dicho	Las Estrellas	Drama	11.7	
16	Peppa Pig	Channel 5	Children	11.4	
17	Modern Family	ABC	Comedy	11.3	
18	Ventaneando	TV Azteca	Variety	11.2	
19	Narcos	Netflix	Drama	11.2	
20	El Payaso Plim Plim: Un Héroe Del Corazón	Disney Junior	Children	11.0	



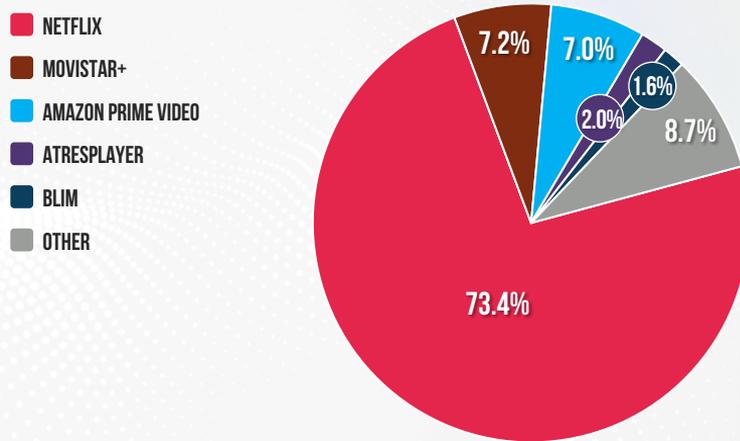
WHICH PLATFORM'S HISPANIC ORIGINALS ARE MOST IN-DEMAND BY US AUDIENCES?

Demand shares of Hispanic original series by originating platform over 24 months



- Netflix is still the dominant player when it comes to Hispanic digital originals that are capturing American’s attention. Its originals’ 73.4% share of demand to-date has held up and remained nearly the same for two years.
- Movistar+ captured over 20% of demand share in February 2020 during the release of season 3 of *Skam España* and Netflix surged to nearly a 90% share of demand following the latest season of *La Casa de Papel*.

Demand share of Hispanic original series by originating platform, Jan – May 2021

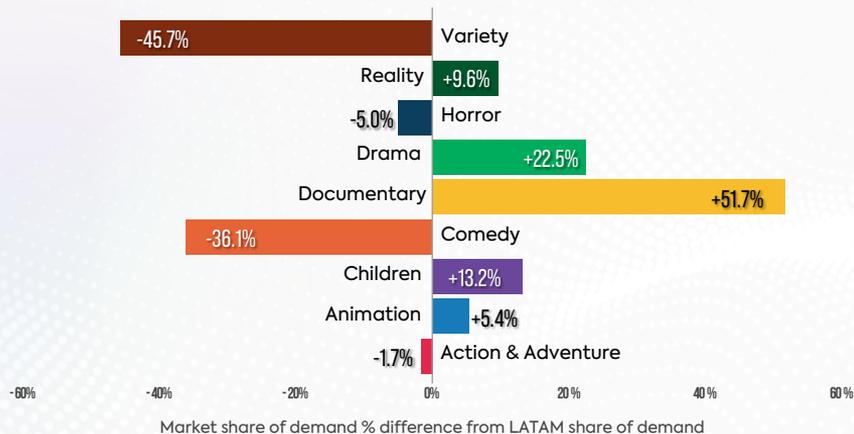


- Movistar+ and Amazon Prime Video are in a tight race with the originals from each platform accounting for about 7% of US demand for Hispanic digital originals.
- Originals from AtresPlayer and Blim have each carved out an approximately 2% share of demand for Hispanic digital originals in the US so far this year.



HOW DOES US DEMAND FOR HISPANIC CONTENT DIFFER FROM DEMAND FOR THESE SERIES IN LATAM?

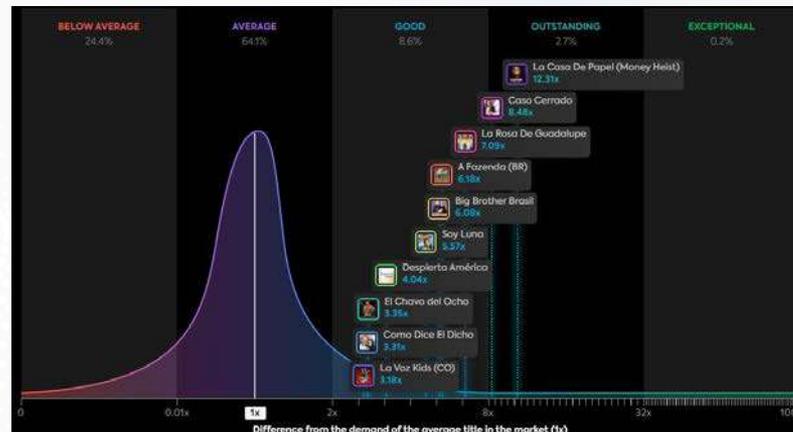
US difference in share of demand for Hispanic content vs LATAM



- US audiences are less enthusiastic about Hispanic comedies and variety series. Variety series often deal with topical content that may be less relevant across markets and the humor in comedies can be market specific and not translate well to international audiences.
- Americans gave a 22.5% larger share of attention to Hispanic drama series. This is helped by both Spanish language series from Netflix built for global audiences, and telenovelas from LATAM finding international success.

WHICH HISPANIC SERIES ARE BEING DEMANDED BY US AUDIENCES?

Select highly in-demand Hispanic series in the US (January – May 2021)



- The most in-demand Spanish language series in the US in the first five months of the year is **La Casa de Papel**. The globally popular hit from Netflix had 12.31 times the average series demand.
- While Hispanic variety series account for a smaller share of attention in America than LATAM, **Despierta América** was the 19th most in-demand Hispanic series so far this year and ranks much more highly in the US than in Latin America.



THE TOP 20 MOST IN-DEMAND HISPANIC SERIES IN THE US

Series Name	Original Platform	Genre	Difference from Market Average (X times)
1 La Casa De Papel (Money Heist)	Netflix	Drama	12.2
2 Noticiero Univisión	Univision	Factual	11.8
3 El Payaso Plim Plim: Un Héroe Del Corazón	Disney Junior	Children	9.6
4 El corazón nunca se equivoca	Las Estrellas	Drama	9.1
5 Caso Cerrado	Telemundo	Reality	8.4
6 Galinha Pintadinha	YouTube	Children	7.8
7 Cleo & Cuquin	Discovery Kids Latin America	Children	7.4
8 La Rosa De Guadalupe	Las Estrellas	Drama	7.0
9 El Señor De Los Cielos	Telemundo	Drama	6.4
10 A Fazenda (BR)	RecordTV	Reality	6.1
11 Big Brother Brasil	Globo Play	Reality	6.0
12 Soy Luna	Disney Channel Latin America	Comedy	5.5
13 Café con aroma de mujer	Telemundo	Drama	5.2
14 Elite	Netflix	Drama	5.2
15 Sin Senos Sí Hay Paraíso	Telemundo	Drama	5.0
16 Al Rojo Vivo Con María Celeste	Telemundo	Factual	4.8
17 Por El Mundo	Telefé International	Reality	4.8
18 Mariposa De Barrio	Telemundo	Drama	4.7
19 Despierta América	Univision	Variety	4.0
20 La Dama De Troya	RCN Televisión	Drama	3.9

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.



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”.

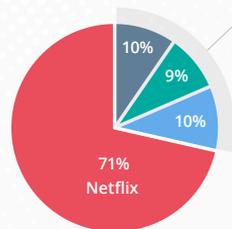
Because our global demand measurement system incorporates multiple country-specific content demand signals, we are able to gauge popularity for TV content long before a series, or platform, is officially released in its home market, or any other market.

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).

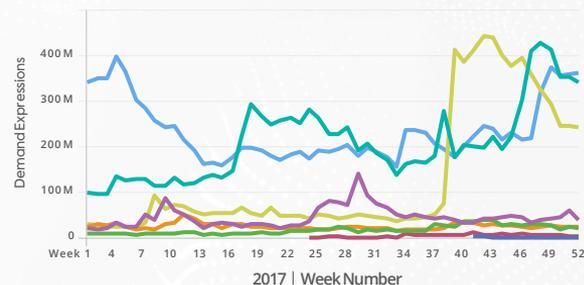
For more [information](#) please refer to our helpdesk article available [here](#).

Total share of demand for platforms in 2017



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

Total platform demand in 2017 (ex. Netflix)



Amazon Video Hulu CBS All Access Crackle Facebook Apple Music Seeso YouTube Premium

QUANTIFYING DEMAND FOR CONTENT

1

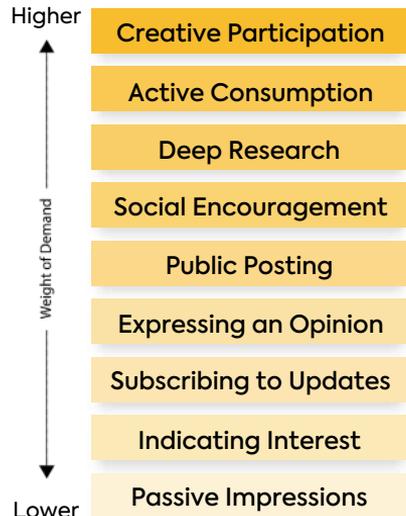
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