

TV Demand

MIPTV 2017 Special: Trends for NORTH AMERICA

Kayla Hegedus, Industry Data Scientist



The year 2016 was good for television. In the United States alone, over 400 scripted series aired, in addition to a myriad of unscripted and reality titles. Globally, the number of television titles must be many times more, though no one has yet attempted to count them all. Out of these thousands of shows, a select group of titles, including newcomers such as Netflix's *Stranger Things* and veterans such as HBO's *Game of Thrones*, succeeded in becoming global hits. These titles were popular not only in their home market but around the world. Many of these titles originated in the United States, but the proliferation of platforms available to consumers is increasing the global exposure of international titles as well. Netflix and now Amazon Video have launched in nearly every country; each market also has an increasing number of competing platforms, each stocked with a catalogue of global titles. Measuring the performance of content now involves not only linear viewership numbers, but also SVOD streams (if the platform chooses to release them), legal and illegal digital downloads and streaming, as well as less direct metrics such as social media buzz, critical

acclaim, and word-of-mouth popularity, all across multiple languages and countries — and devices!

With the television landscape becoming more global and complicated by the year, measuring trends in content has become increasingly difficult. As a result, **Parrot Analytics** has developed the world's first cross-market, cross-platform measure of content demand. This metric, called **Demand Expressions™**, quantifies the popularity of a TV series and is generated for each title, in each market, on each day. By tracking demand over time, global content trends can be found, giving insight into the current state of television content.

Using **Demand Expressions™**, this report analyzes the major trends in North America. By averaging the demand by title, the top ten titles of last year are found in the region, uncovering the content preferences for this market.

This report also highlights the percent of demand from genres and major sub-genres in North America, as well as the share of demand from each production company and original network and platform.



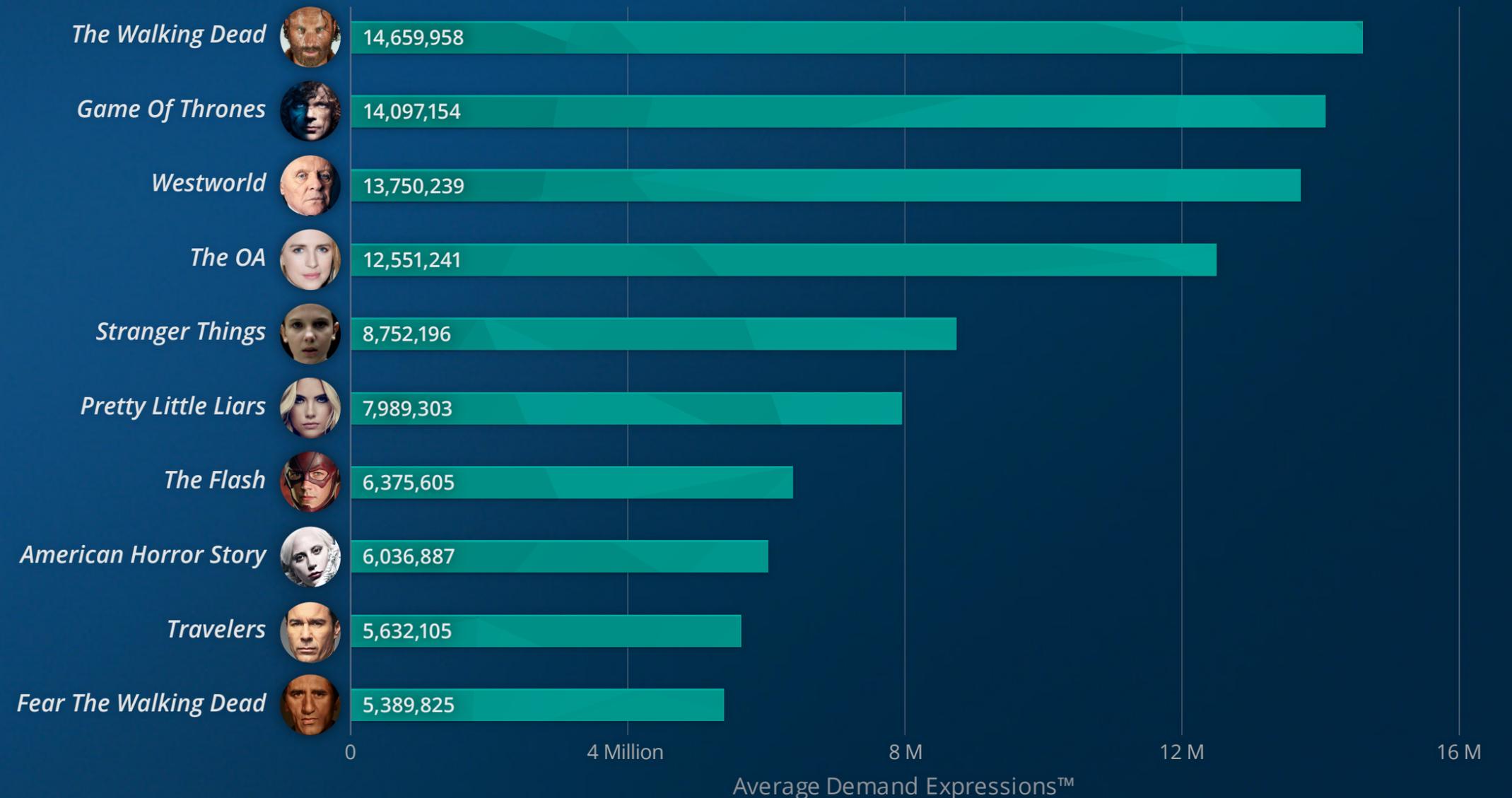
Titles are ranked by their yearly average demand in the region to find the most popular series of the year. The share of demand from each genre and the top ten sub-genres by total demand reveal broader content trends, while the top channels and studio market share indicate the origin of the most in-demand content.



Most in-demand titles in North America



Top 10 Titles of 2016



In North America *The Walking Dead* ranked highest over the past year with about 4% more demand than *Game of Thrones*, and while these two megahits dominated elsewhere *Westworld* had only 2% less demand than its fellow HBO series in this region. Instead of one breakout title, North America had several hits in 2016.

Other new titles, especially from Netflix, also ranked highly: *The OA* and *Stranger Things* were more popular on average than teen hit *Pretty Little Liars*, and the Canadian series *Travelers* had 4% more demand than *The Walking Dead's* spinoff. Because these titles were initially released in North America, for this market, it makes sense that new titles were most popular here.

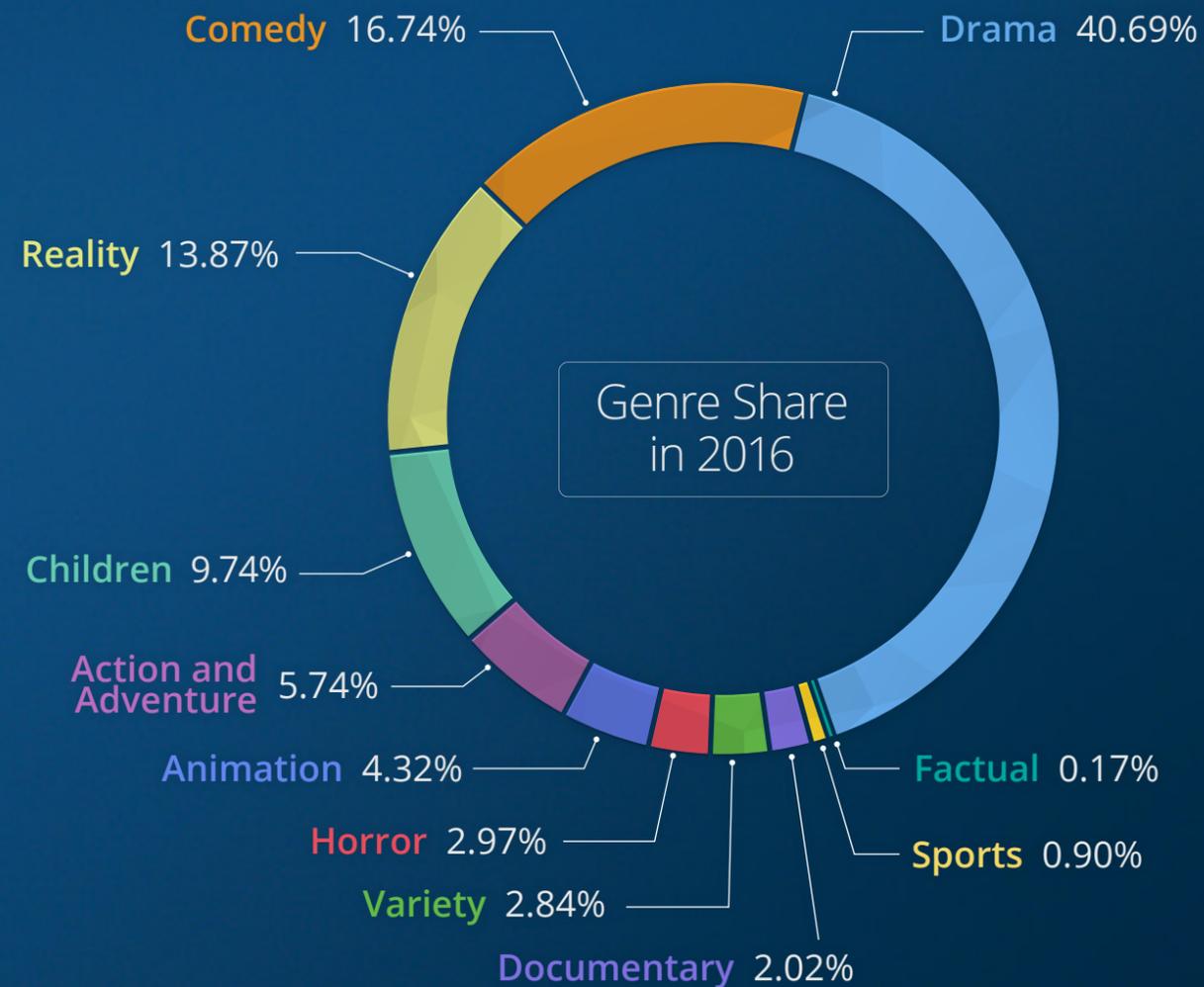
Most in-demand content genres in North America



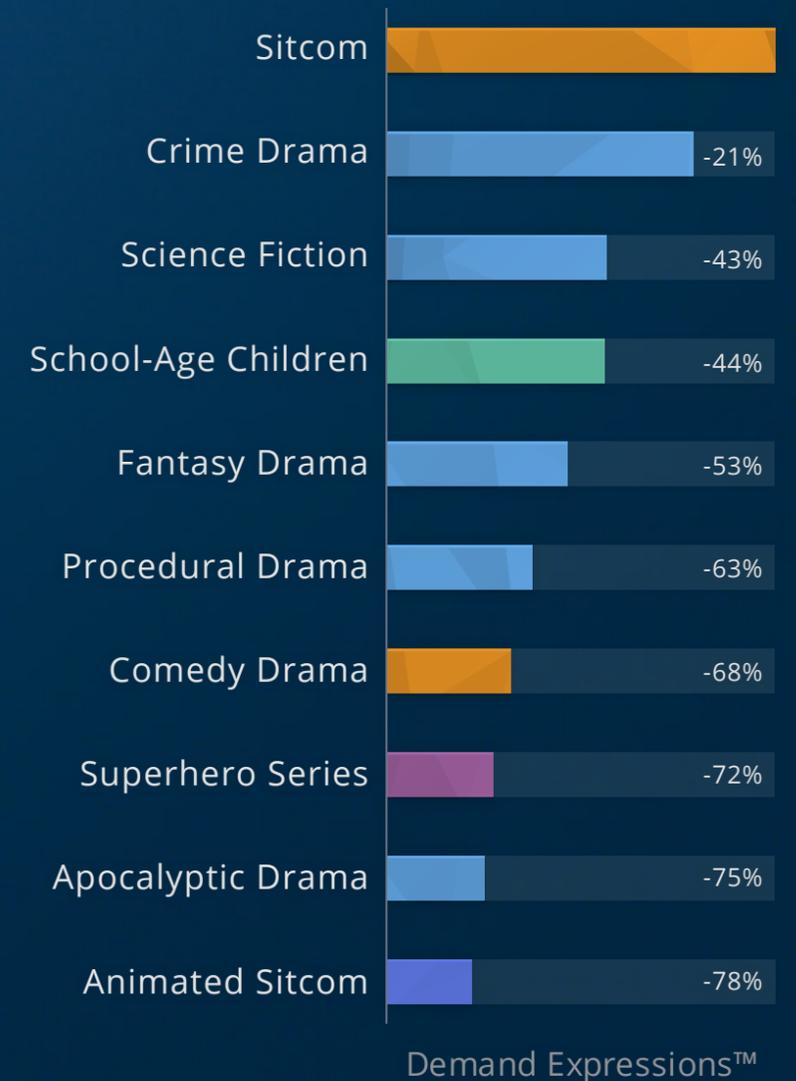
Dramas had the smallest share of demand in North America out of the global regions, with only about 40% of demand. Comedies, at over 16%, and reality titles, at 13%, both had their largest share in this region. Sitcoms had the most demand, but the teen drama sub-genre was replaced here by animated sitcoms.

Comedies were likely especially popular in North America as most of them are English-language titles and humor is difficult to translate and localize.

Reality television is most prolific and popular in the United States. Animated sitcoms, such as Family Guy, often base their storylines and humor on topical, local pop culture, limiting their appeal in other global markets.



Top 10 Sub-Genres by Total Demand in 2016

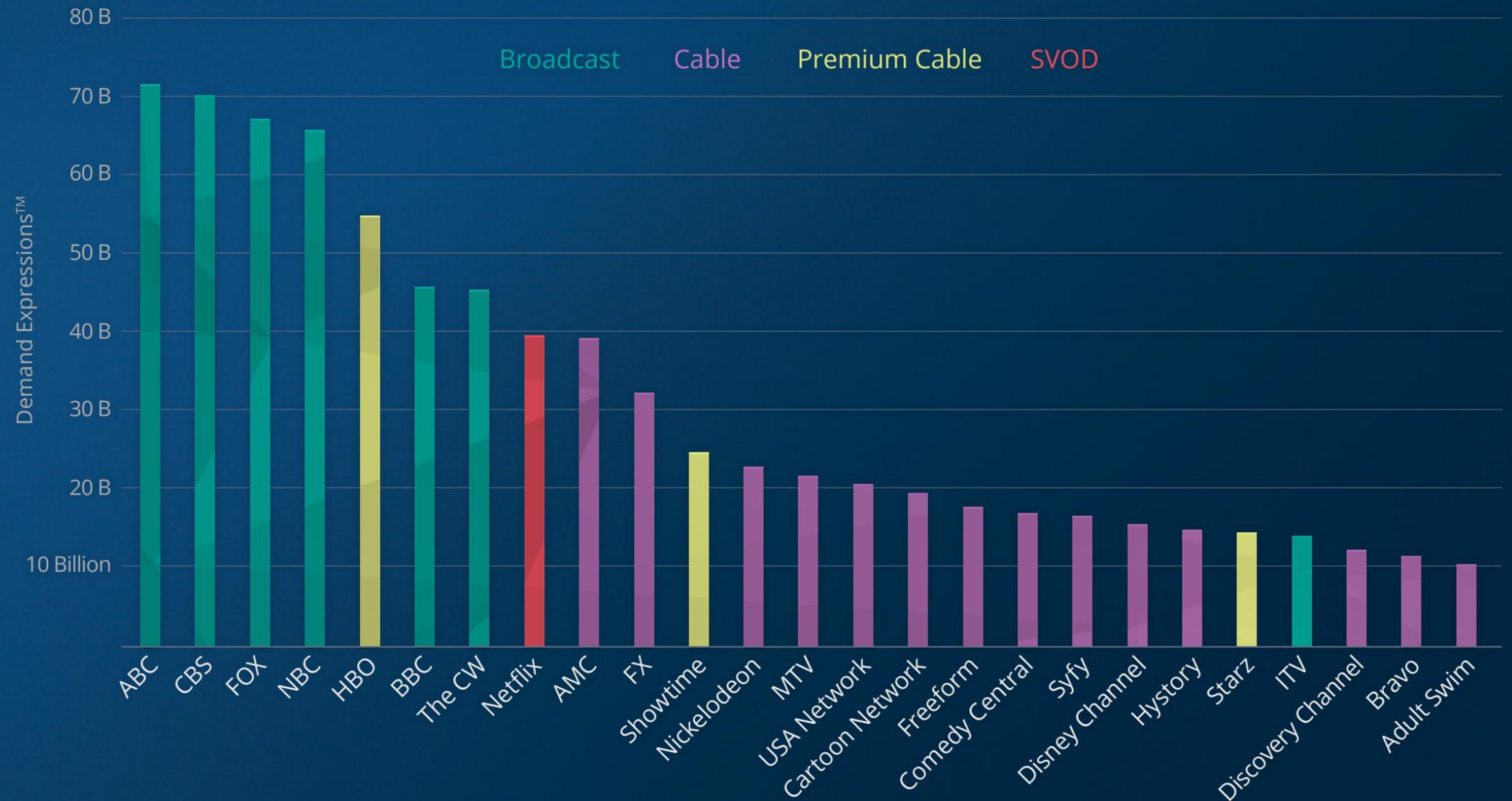


Percent difference from demand for Sitcoms

Top channels and platforms in North America



Top 25 Channels and Platforms in 2016 by Total Demand



The majority of the channels and platforms with the most demand for their content were based in the United States; only the BBC and ITV, from the UK, did not originate in this region. The four major broadcasters (including NBC) had the most demand, with ABC leading. HBO ranked fifth with 16% less demand than the broadcasters, and the BBC and the CW followed with 16% less demand than HBO.

With 27 million subscribers in the US, Netflix had more demand for its originals than the top US cable channel, AMC. FX only had about 18% less demand than them, but the rest of the top cable channels, including premium channels Showtime and Starz, had over 35% less demand, illustrating how difficult it is for a small channel to stand out.

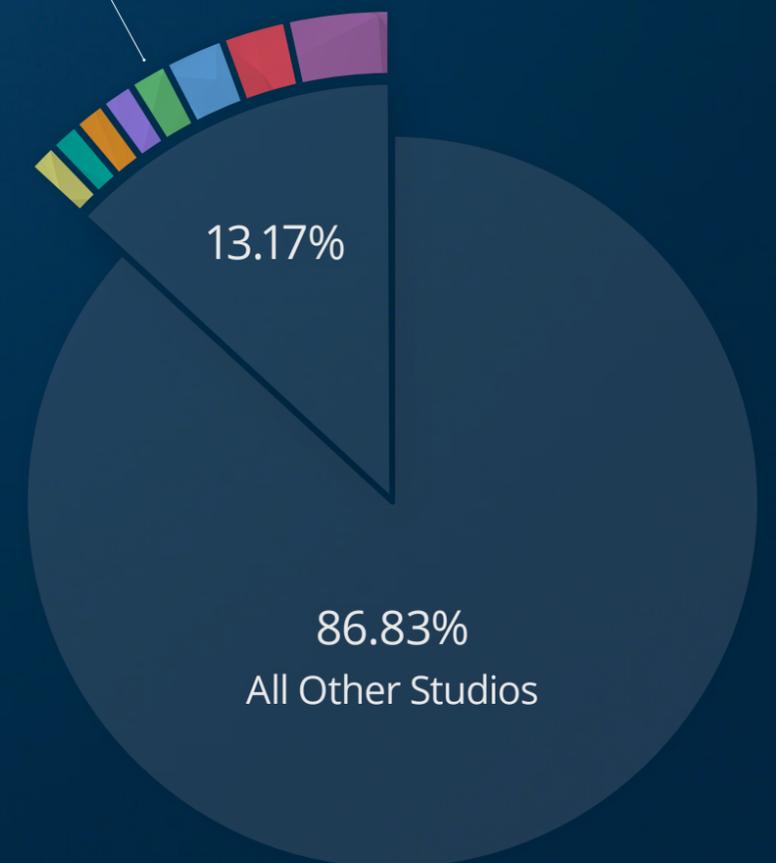
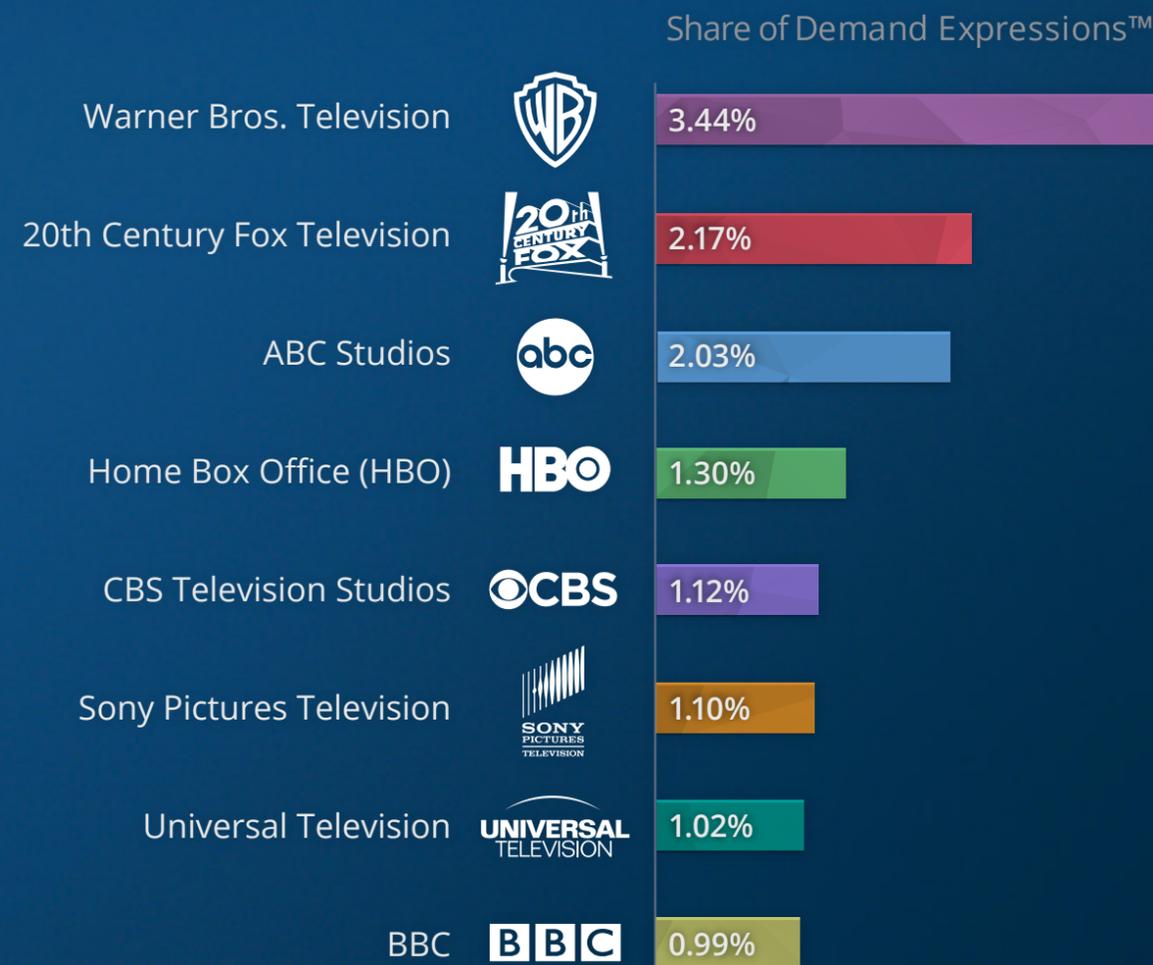
Major studios with the highest demand in North America



Share of Demand for Major Studios

Total Share of Demand for Studios

Top 8 Studios



Many production companies, in addition to most of the top eight, are based in North America and produce content for the region. Therefore, the share of demand for all the other studios was largest in this region, and the share for the major studios the smallest at only 13%. Warner Bros. was most affected by this competition, with a share over 1% less than in the other regions.

The overall ranking of the major production companies was the same in North America as in Europe: Though the identical ranking suggests similar preferences between the regions, Warner Bros., 20th Century Fox, ABC Studios, and HBO had a larger share in Europe while CBS Television, Sony Pictures, Universal Television, and (surprisingly) the BBC had a larger share in North America.



Parrot Analytics is a technology and data science company that measures global demand for television content.

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

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

Industry-first: **DemandRank™**

Parrot Analytics captures cross-platform audience demand for content around the world. Audience demand reflects the desire, engagement and viewership, weighted by importance; so a stream/download is a higher expression of demand than a passive impression or a comment.



Global Demand Measurement

To solve the industry’s measurement challenge with the rapid proliferation of content distribution platforms and unprecedented levels of consumer fragmentation, **Parrot Analytics** has developed the world’s first and only cross-platform, country-specific and real-time content **Demand Measurement** system, where **Demand Expressions™** are one of the components.

Demand Expressions™

Total audience demand being expressed for a title, within a market.

Characteristics of **Demand Expressions™**:

- ▶ They measure actual, expressed demand. **Parrot Analytics** does not use panel data.
- ▶ They encompass demand expressed by audiences from a multitude of sources, weighted by importance.
- ▶ There is no ceiling to how many **Demand Expressions™** a title can generate in a market.



Global Demand Measurement

Cross-Platform, Country-Specific, Real-Time

*Parrot Analytics' **Demand Measurement System** is leveraged by leading global media organizations to understand global demand for content across their (and their competitors') portfolios, enabling them to increase the yield on their investments, acquisitions, marketing and distribution strategies to ultimately stand out in a crowded market through an unprecedented understanding of global content popularity.*

For more on **Parrot Analytics'**
Global Demand Measurement System,
read the **GUIDE** 



insights@parrotanalytics.com

1 877 624 7109

