

On the rise:

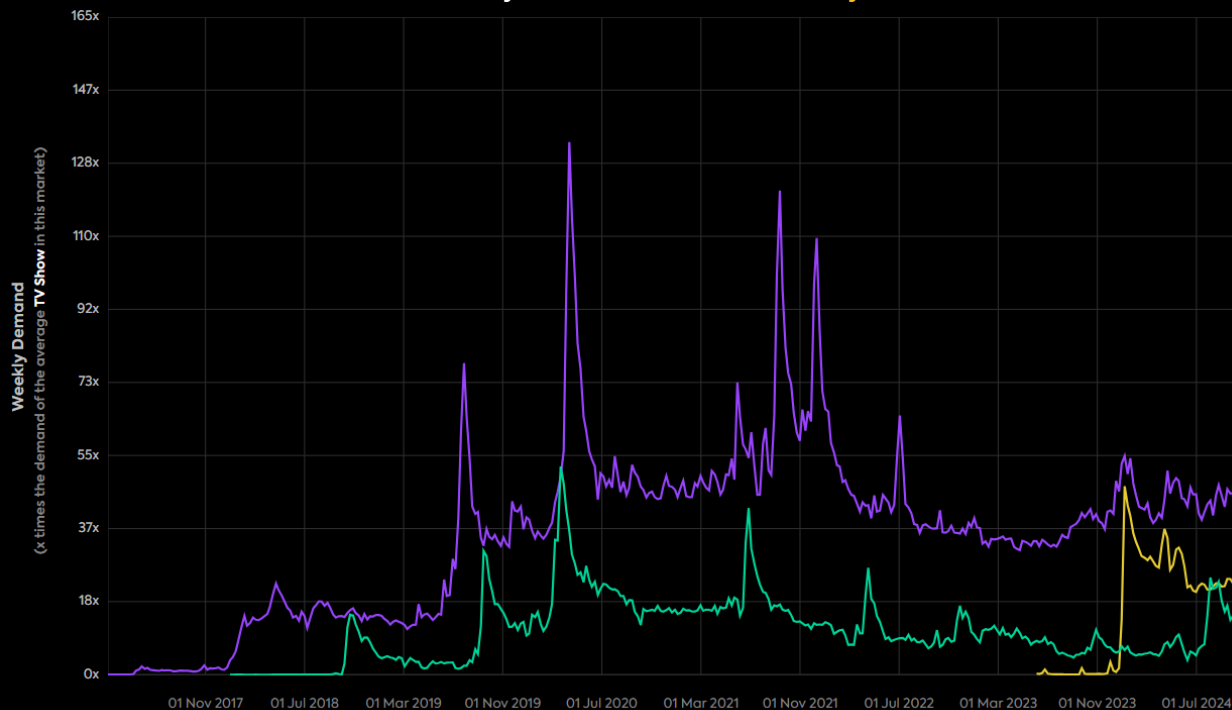
Revealing the global value of Spain's Content

October 2024



In the past 6 years, *Money Heist*, *Elite*, and *Berlin* have led the global surge in demand for Spain-originated TV shows, setting the stage for more to come

Global Weekly Demand Nov 2017 – July 2024



Peak Demand

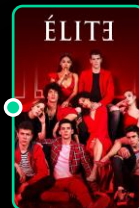
The highest audience demand for a title



143.73x

(X times the average TV Show)

April 8th, 2020



54.24x

(X times the average TV Show)

March 15th, 2020

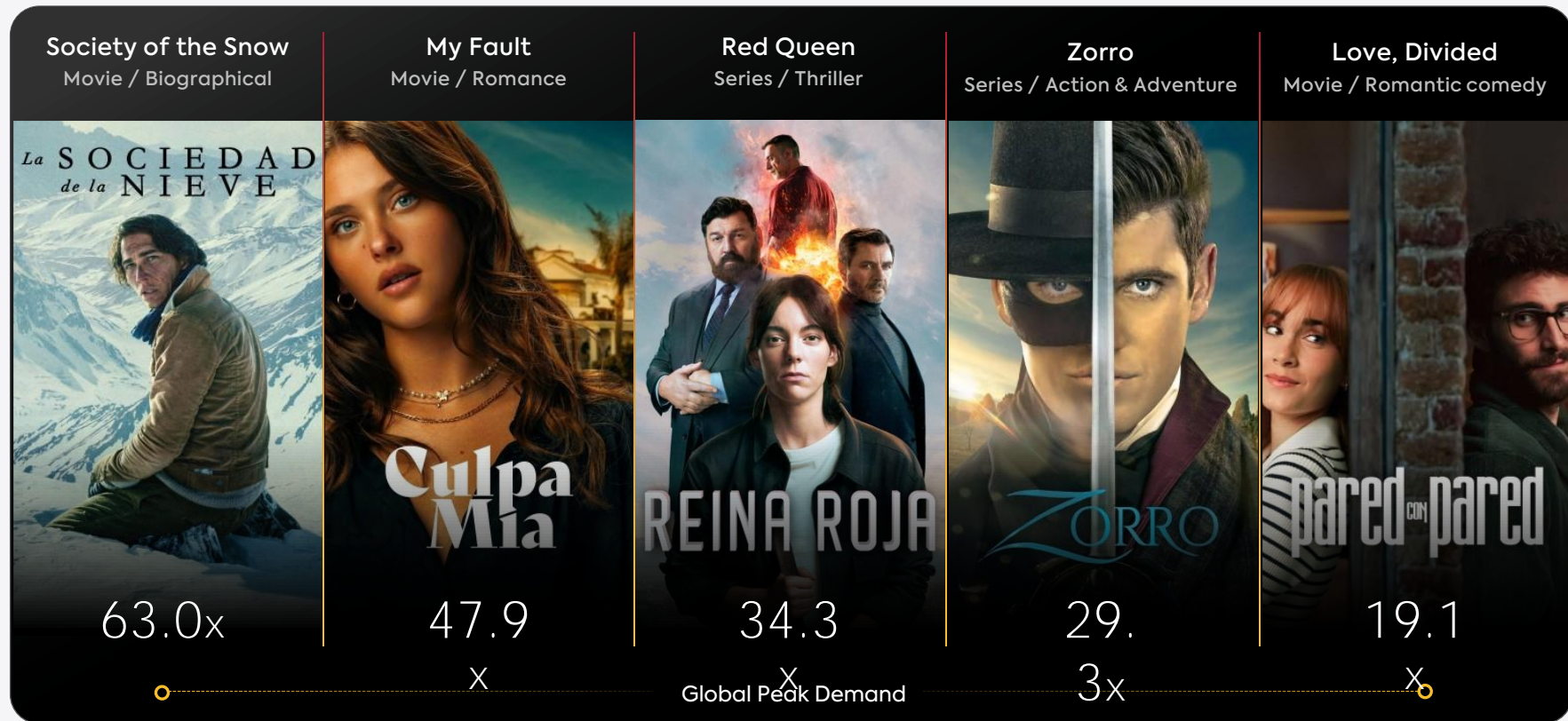


59.16x

(X times the average TV Show)

January 2nd, 2024

Spanish TV/film titles have shown **strong global demand** in recent years, appealing to a broad and growing audience

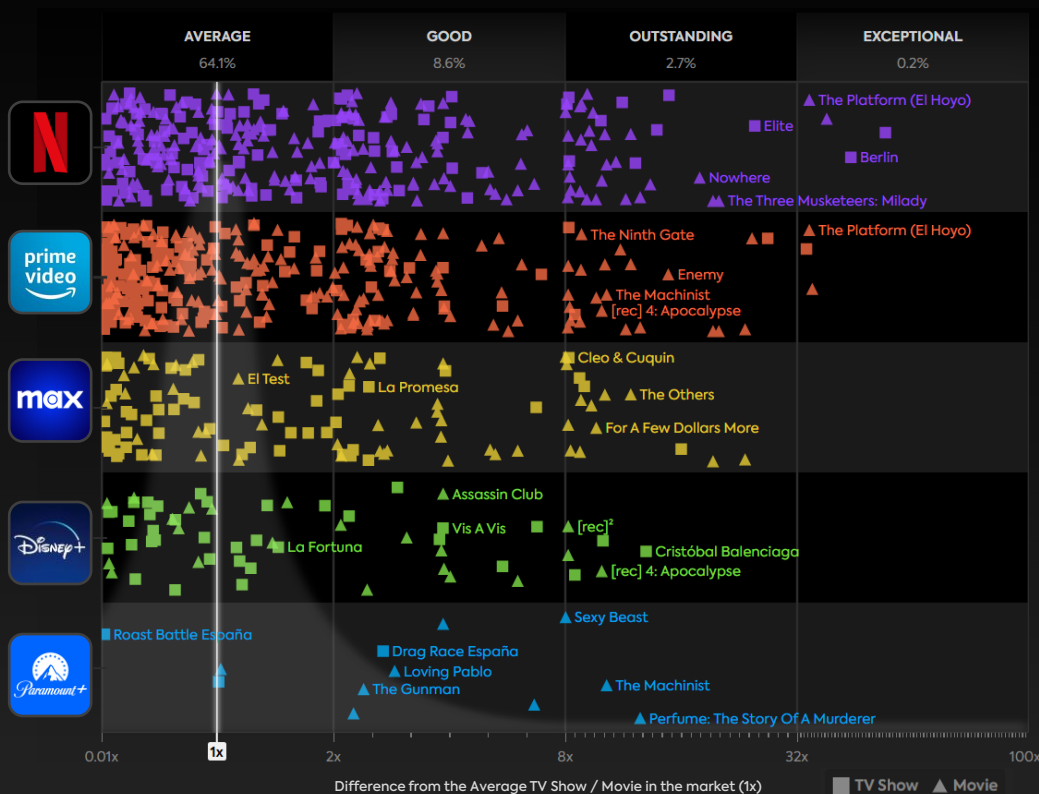


Spanish productions have seen a **22% global increase** in availability on major streaming platforms between 2021 and 2023, reflecting rapid growth in recent years.

Many of these titles have become high-performers globally, with over 200 titles in the top **10%** of demand for major global streamers.

Global Peak Demand Distribution of Spain-Originated Content

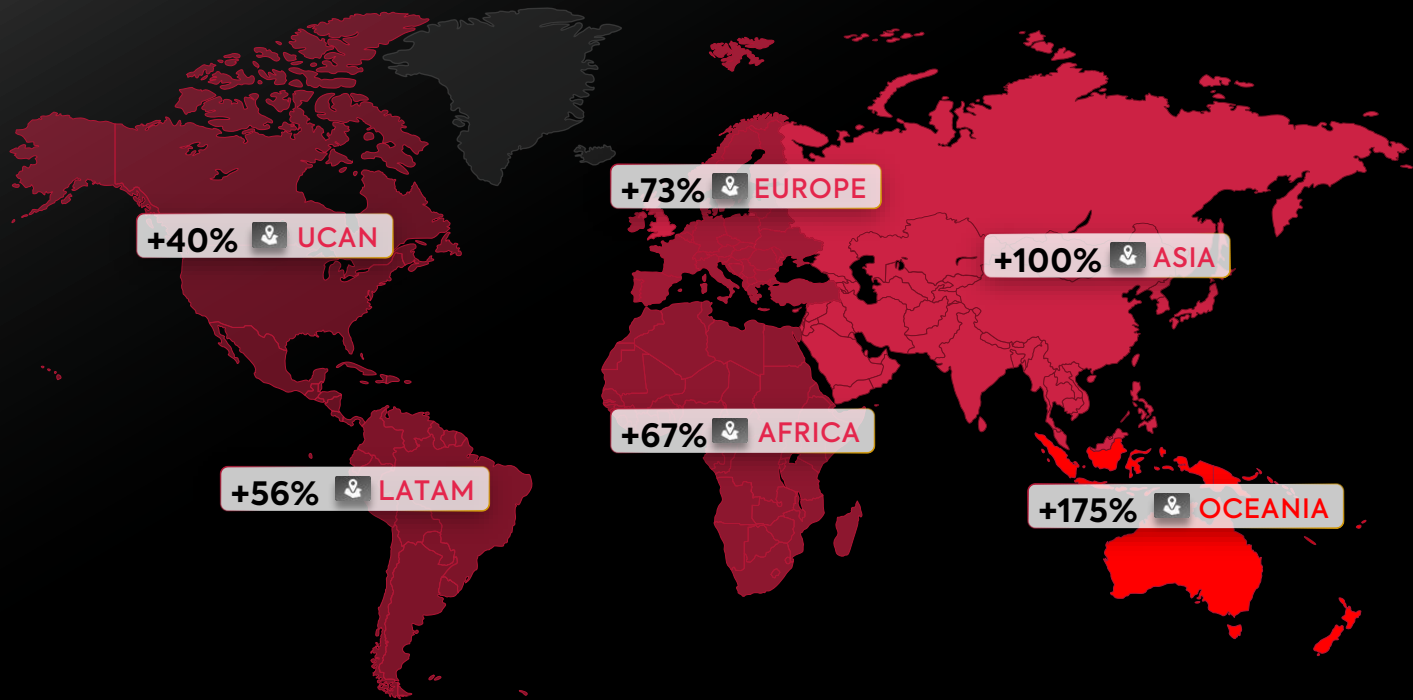
Jan-Sep, 2024



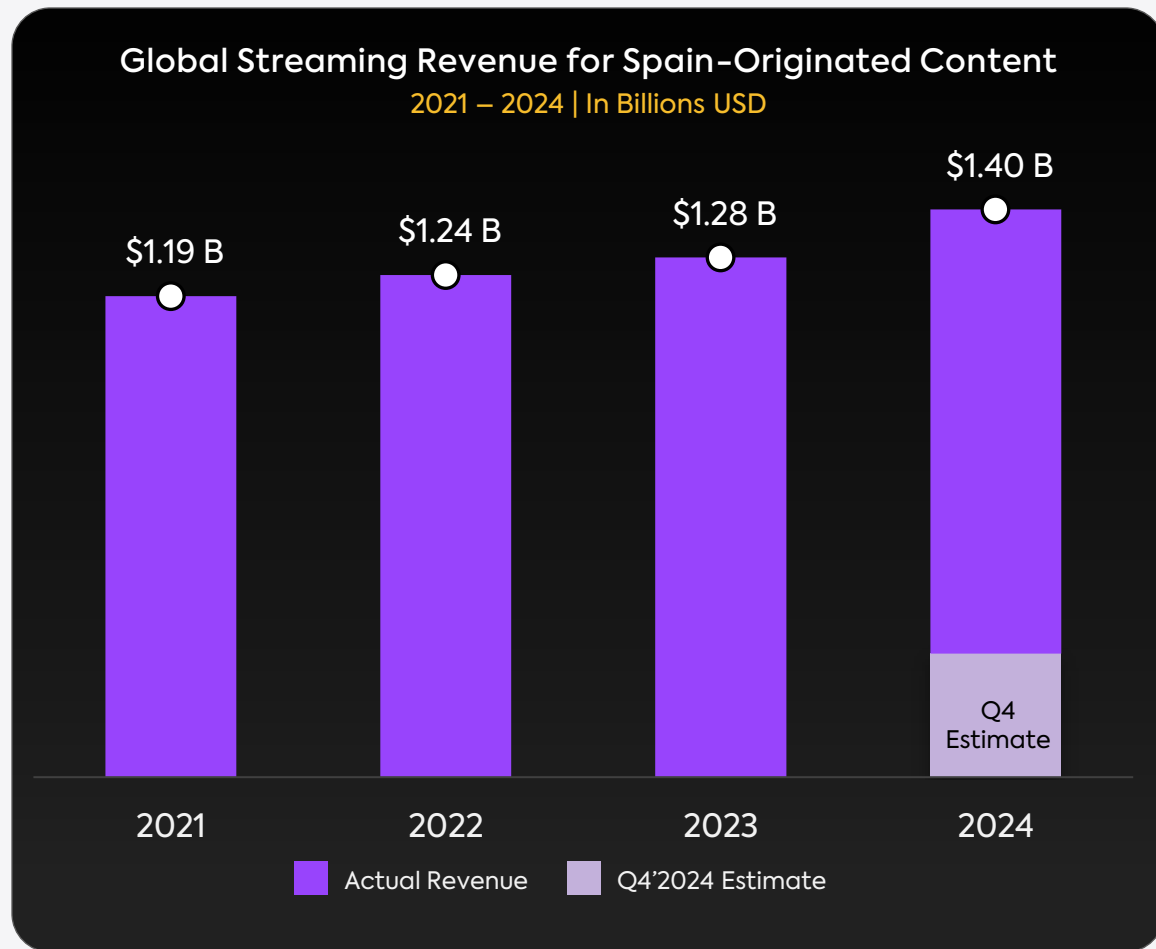
The rise in Spanish titles available on streaming platforms is directly linked to **the growing demand across all regions**

Demand Growth of Spain-Originated Content by Region

2024 vs. 2023

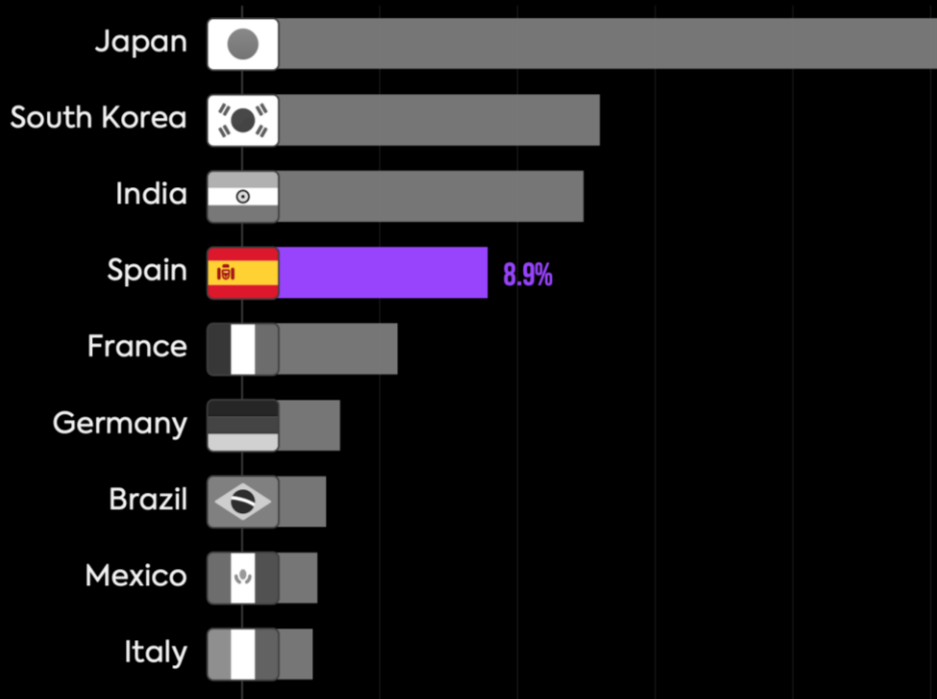


- Revenue from Spain originated content is on the rise across major streaming platforms, showing consistent year-over-year growth.
- In total, Spain-originated content has generated **\$5.1 billion** in global revenue over the past four years, marking a significant contribution to the global entertainment landscape.



- Spain ranks as one of the top five markets for global revenue generated from non-English content, positioning itself as the leading European and Spanish-speaking content market.
- It highlights Spain's important role in the global streaming landscape and reflects its capacity to capitalize on the growing popularity and demand for non-English programming.

Global Streaming Revenue Share For Non-English Content By Country of Origin | 2021 - 2024



Assessing the ***impact***
of key ***Spanish titles*** on
subscriber growth
across major ***streaming***
platforms



'Red Queen' ranked in the top 5 new Amazon Prime Video series in 2024 for acquiring and renewing the most subscribers in the first 13 weeks post-release.

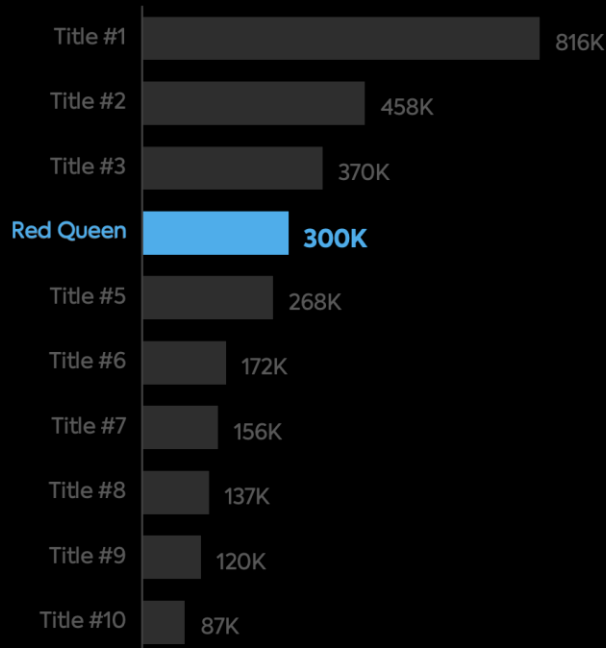


Total Global
Subscribers Activated *

2.3M

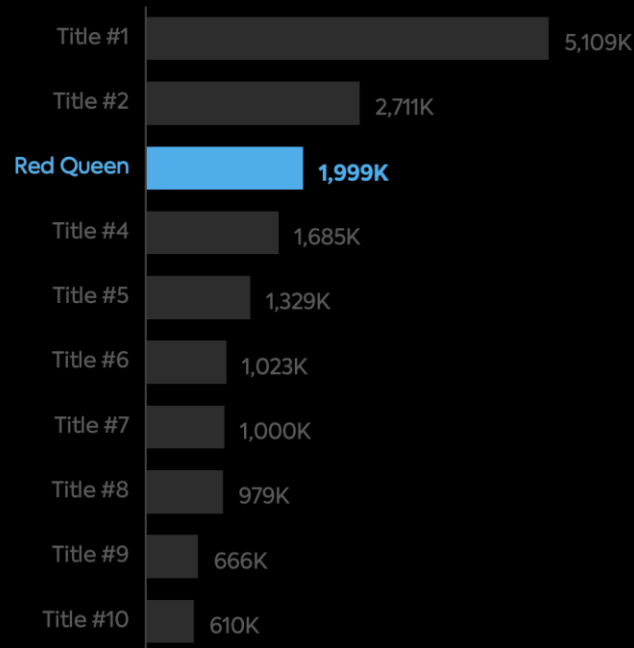
Subscribers Acquired

Top 10 Series – First 13 Weeks Post-Release



Subscribers Renewed

Top 10 Series – First 13 Weeks Post-Release



* Activated subscribers represents the sum of subscribers that this title has decisively contributed to acquire or retain

Spain-US Coproduction 'Land of Women' ranked in the top 15 new Apple TV+ series in 2024 for subscriber growth in the first 10 weeks.

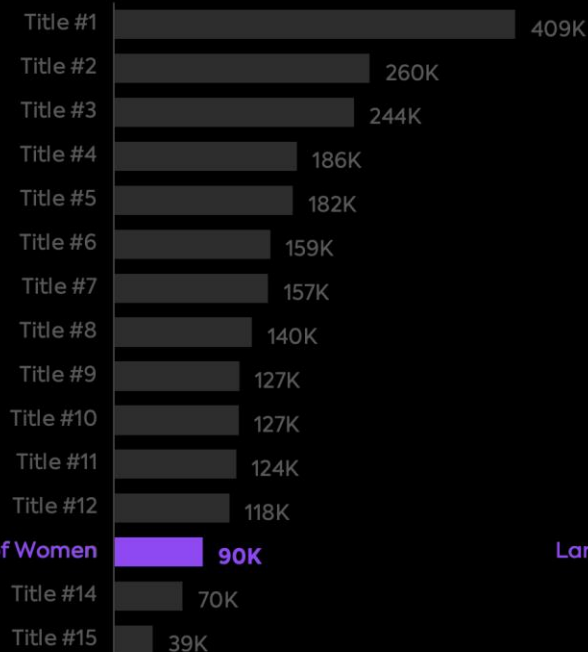


Total Global
Subscribers Activated *

778K

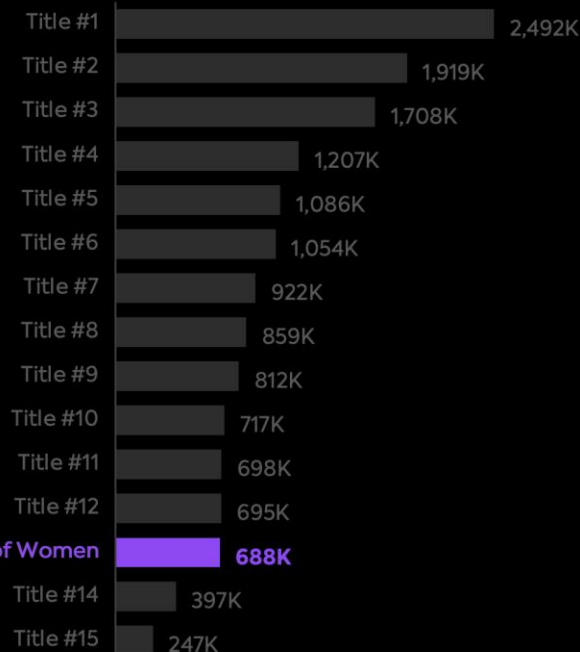
Subscribers Acquired

Top 15 Series – First 13 Weeks Post-Release

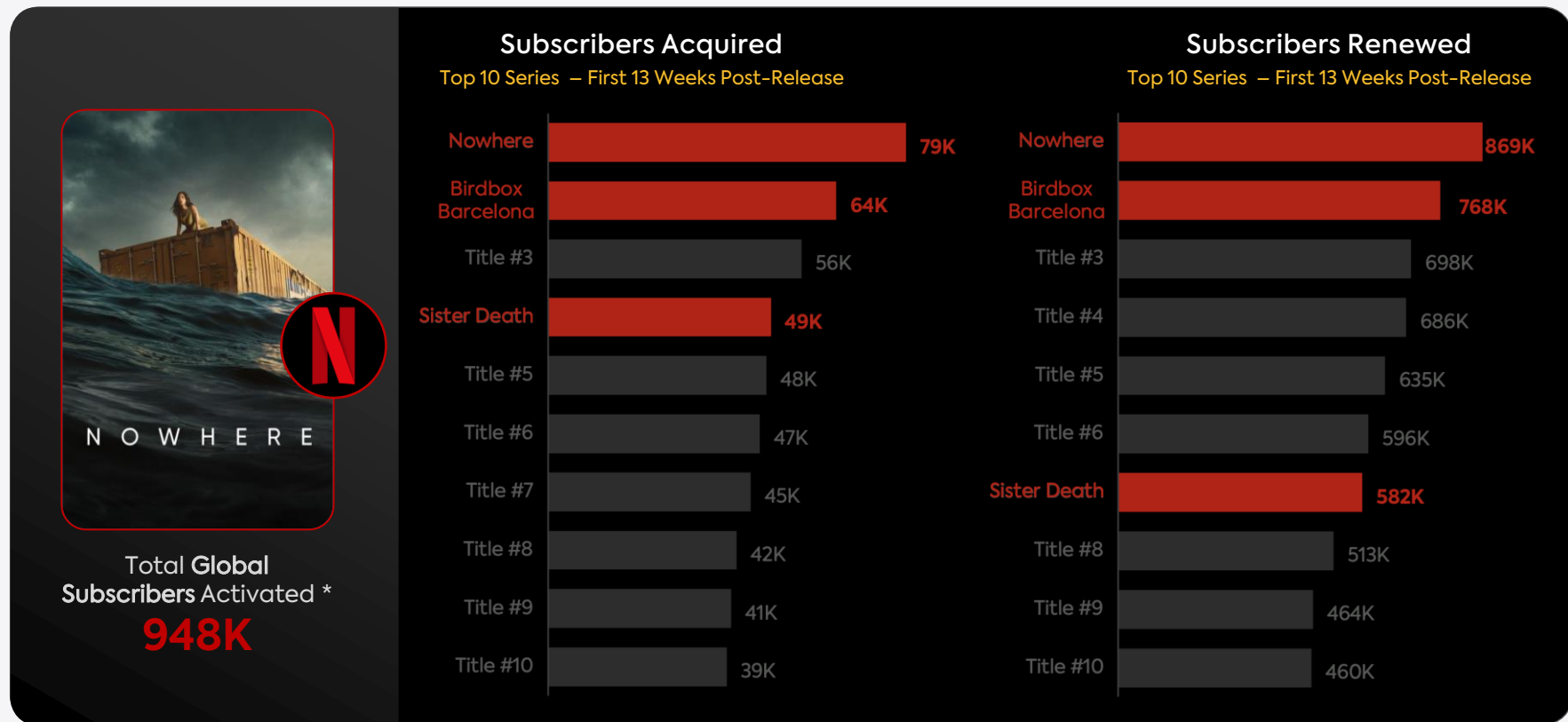


Subscribers Renewed

Top 15 Series – First 13 Weeks Post-Release



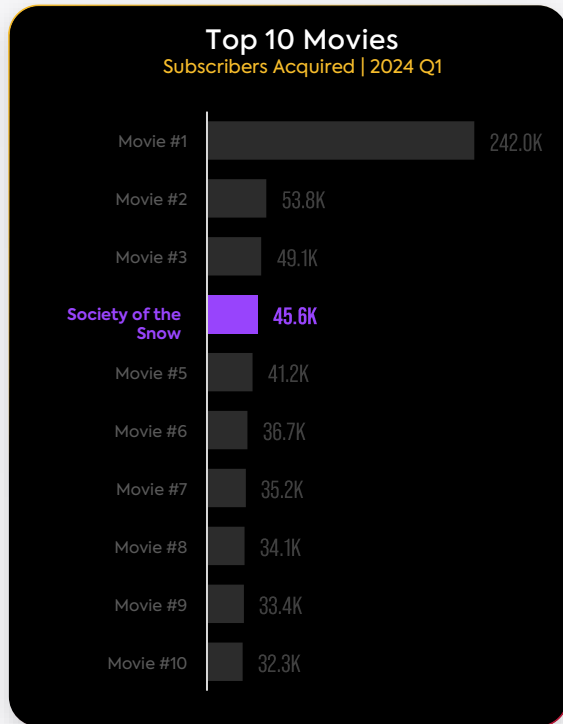
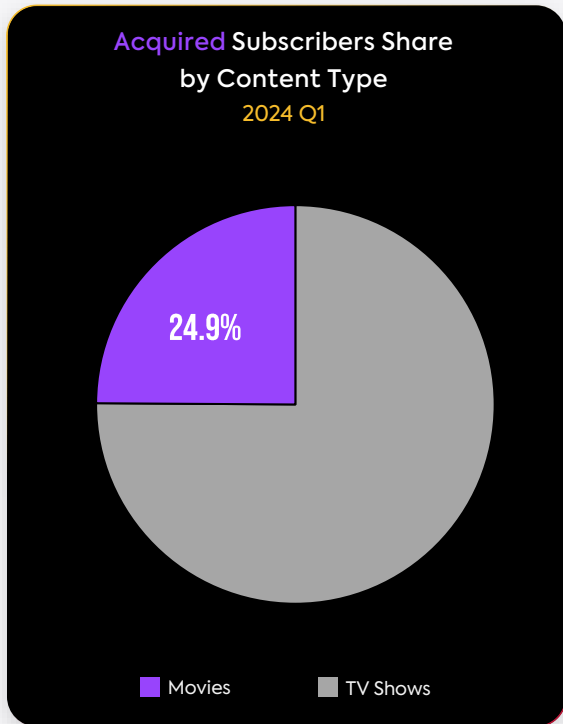
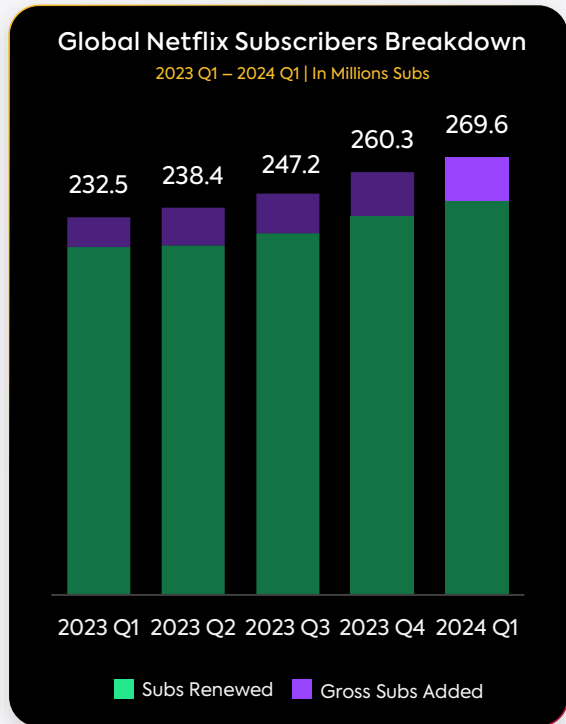
'Nowhere' was the **#1 non-English film** on **Netflix** in 2023 for subscriber growth in the first 13 weeks, alongside two other Spanish movies.



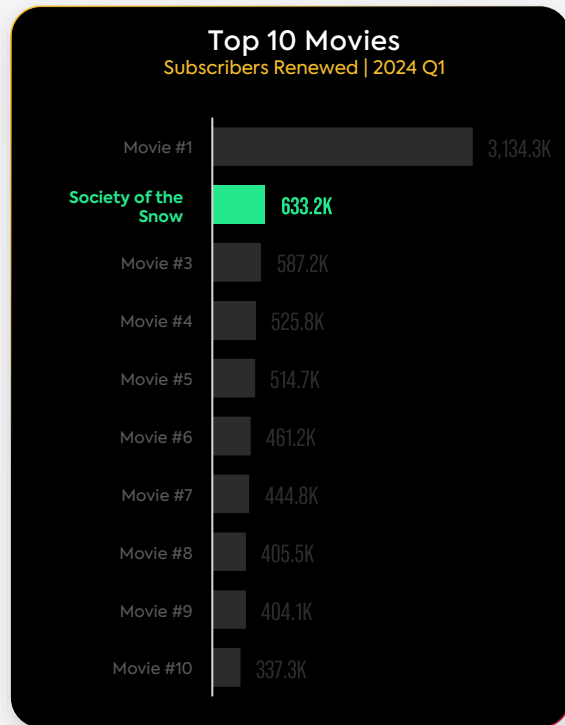
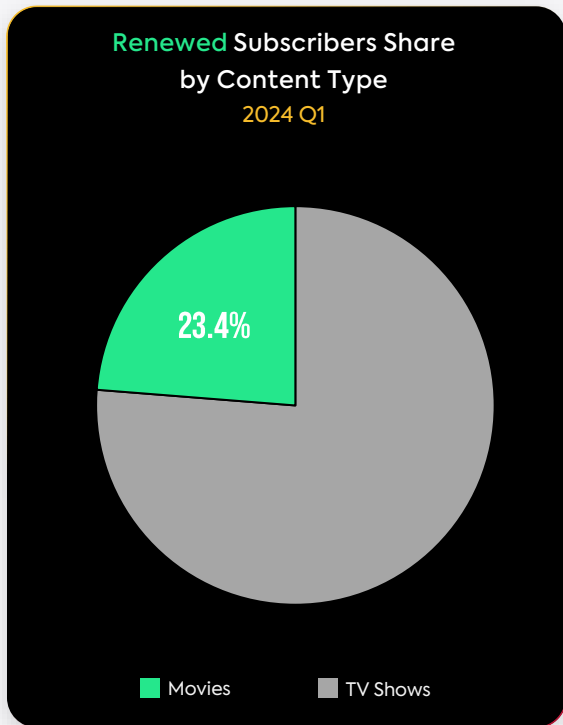
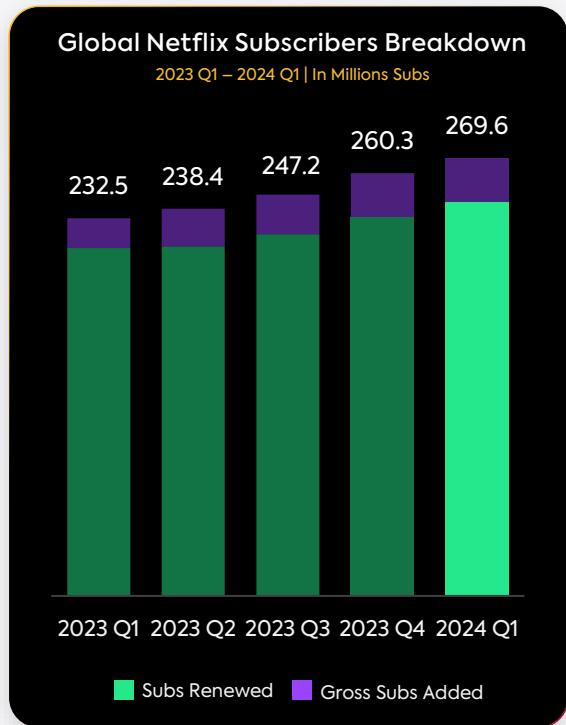
Assessing the
impact of *Society of
the Snow* on Netflix's
subscriber growth



‘Society of the Snow’ was the #4 movie driving the most subscriber acquisitions for Netflix in Q1 2024.



‘Society of the Snow’ was the #2 movie contributing the most to Netflix’s subscriber renewals in Q1 2024.



Appendix

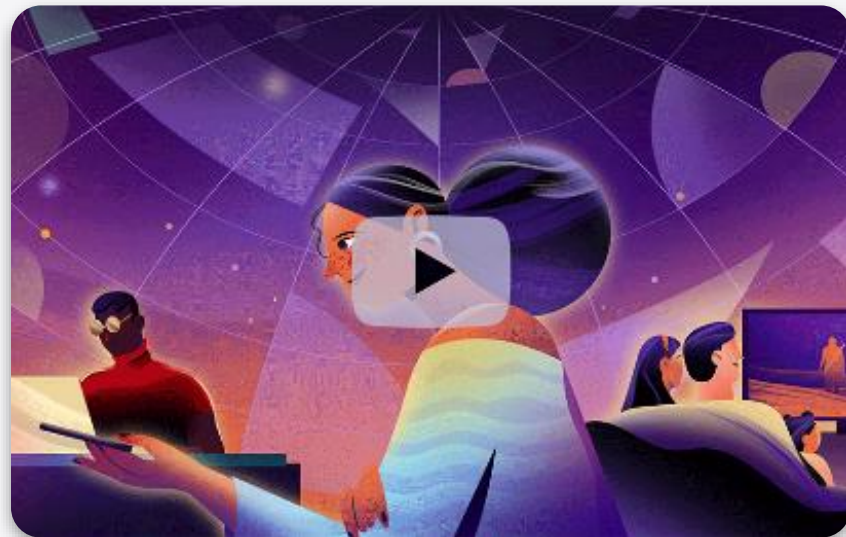


What Is **Demand** and Why It Matters

Parrot Analytics' comprehensive audience attention measurement system captures the world's largest audience behavior dataset. We extract the signals from the noise to deliver the first globally standardized measurement of audience demand for all markets, in all languages and across all platforms and devices.

Our technology quantifies global consumer demand for TV, movies, and talent. Billions of people interact with content and talent each month and Parrot Analytics systems **collect and analyze the activities, interactions and behaviors from over 2 Billion people every day**, which includes **exclusive first-party consumption datasets from over 350 million households globally** as well as hundreds of millions of households' search, posts, reading and social interactions activity. Our data sources include search engines, wikis and informational sites, fan and critic rating sites, social video sites, blogs and micro-blogging sites, social media platforms, peer-to-peer apps and open streaming platforms.

By measuring demand for TV, movies, and talent we are quantifying the attention economy, **our system captures how much attention, engagement, desire and viewership is expressed by consumers** for content and talent, all around the world.



Watch
now

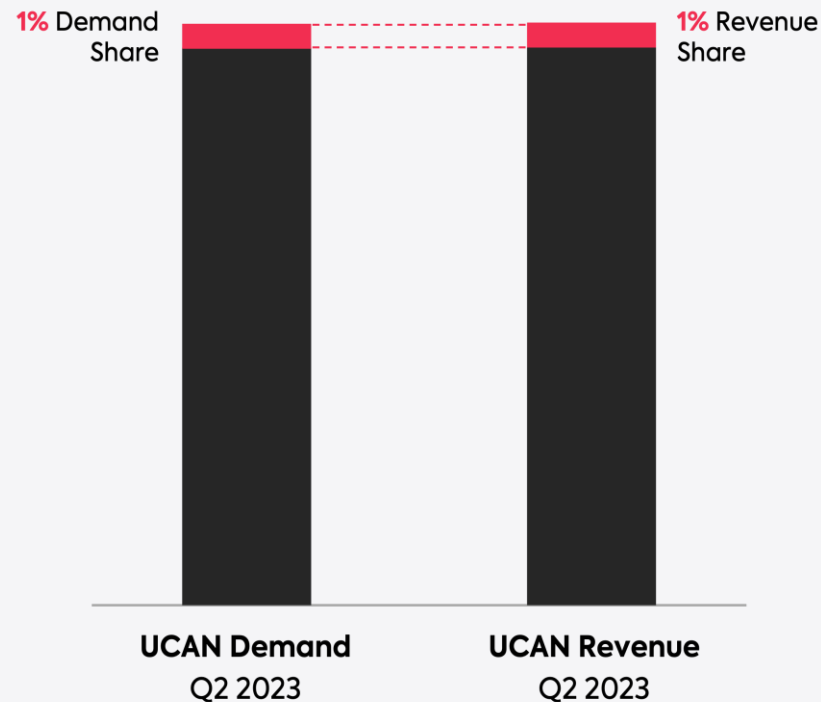
Assigning a ***precise \$ value figure*** for each title, on each service, in each market

Parrot Analytics can measure the demand share of a film or TV series of any streaming service's full catalog, in any market, and **determine what percentage of direct revenue that title has contributed to that service in that market.**

For example: Netflix reported \$3.6B in revenue in UCAN in Q2 2023. A title with 1% share of UCAN regional catalog demand, as measured exclusively by Parrot Analytics, has contributed 1% share of that revenue to Netflix's UCAN streaming revenue. Therefore, a title with 1% UCAN audience demand is worth \$36M to Netflix in Q2 2023.

We can measure the demand for a title before it is available on a streaming service, thus providing the ability to measure the economic impact it would have on that streaming service. It is also important to keep in mind that **different titles generate value in different ways for streaming services.** Some titles **drive user acquisition**, and some perform a critical role in **preventing users from churning off the streaming service.** All of these titles are valuable, and understanding the role that each plays is critical to a thriving industry.

Crucially, because of how rich the underlying multi-touch datasets are, Parrot Analytics' Content Valuation system is also able to drill down into how each title generates revenue for streaming services.



Each piece of content adds value by **driving new sign-ups** and **monthly renewals**

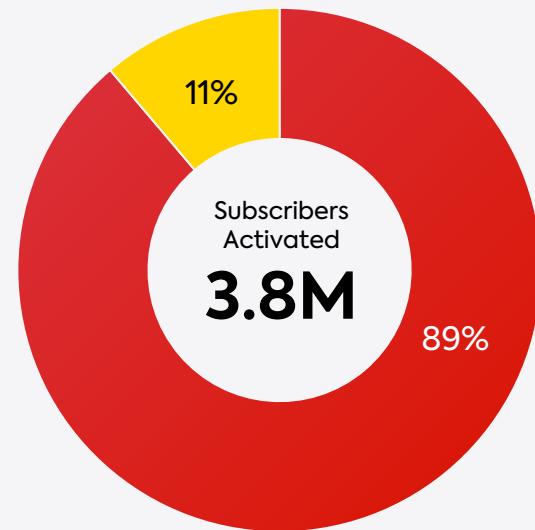
Every title adds value to a streaming service by **acquiring new** and **retaining existing subscribers**. Each title's revenue contribution to a streaming service can be uniquely expressed as the subscription impact that is made up of a number of new sign ups and a number of monthly renewals. These two title-specific, market-specific, and service-specific dimensions of value make it plain to see to what extent one title might be better at bringing in new subscribers to a given streaming service, or whether a title is especially good at retaining subscribers.

Understanding what would drive acquisitions and retention for each service, in each market, **maximizes the \$ yield for each title on an ongoing basis**. However, because streaming services can only see what content is working within their own individual systems, it means today's fragmented streaming model has made it impossible for the industry to understand cross-platform behaviors using traditional measurement approaches. This is precisely what Parrot Analytics' Content Valuation system provides. Based on each title's audience overlap with every other title on every network and streaming service, that title's specific value to each service can be calculated within each market.

In addition, Parrot Analytics' expansive metadata systems and taxonomy groupings are also leveraged on the supply-side of the equation to inform decision making. Various ancillary datasets are available, from audience demographics and sentiment to brand affinity (for those monetizing through ads), to further help maximize the monetization potential of each title, each streaming service and ultimately the entire industry.

For more information, refer to: <https://www.parrotanalytics.com/strategy/how-to-measure-the-value-of-content-in-the-attention-economy/>

Subscribers Breakdown



■ Subscribers Retained ■ Subscribers Acquired



Thank You

For questions please contact:

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Unlocking the magic of content in the attention economy



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