

THINKDATA.

BRIDGING THE DATA GAP | MAY 2022

THINK DATA: BRIDGING THE DATA GAP

BY SARAH CALDERÓN - CEO



RAQUEL CABRERA - STRATEGY DIRECTOR



Don't write Netflix off yet.

Speculation and a difficult Q1 report may suggest that Netflix is starting a decline. The widely publicised losses in its subscription base are explicable by fierce competition, inflation, a post-pandemic world and screen exhaustion. However, in the Q2 reports, Netflix announced that the churn in its subscribers was not as dramatic as expected.

Industry gossip pointed to "Stranger Things" as the show likely to save the day. However, when we look at the data, we realise Netflix is here to stay for long. The solid strategy of the N platform is not entirely dependent on isolated titles or lucky breaks. Netflix doesn't leave cracks, or empty gaps; it tackles each and every audience with a different show and film every month and delivers. Across territories, we can see this month that "Stranger Things" is certainly not the only show people watch.

Besides several American films and shows that perform well in every genre, European Glocal content has massive importance and variety, with content of Latin American, Spanish, French and Polish origin all delivering excellent results this month. Audiences were treated to a generous amount of very diverse fare, from telenovelas to European-produced Young Adult series, Action movies and comedies, and were able to see a broad range of content on Netflix worldwide).

"Netflix is here to stay for long. The solid strategy of the N platform is not entirely dependent on isolated titles and lucky breaks. Netflix doesn't leave cracks, empty gaps; it tackles each and every audience with a different show and film every month and delivers."

Amazon cannot tell the same story. With 10-20% of views in the cumulated territories, there are several clearly identifiable problems: the main one is that there doesn't seem to be a consistent strategy behind the battles that could have been won. Month after month, Prime Video is not evolving. Sometimes it breaks through in genres like Drama or Comedy, but brusquely deflates the following month. In other territories, Amazon simply doesn't have any locomotives to drive an audience and just eats crumbs from non-exclusive content. The combination of both issues: discontinuity and the lack of a hit, make it impossible to deliver better results.

THEFILMAGENCY

THE PRESS SAY ABOUT US

“ The Film Agency’s new analytical product, Think Data: Bridging The Data Gap, aims to **empower** independent content creators by giving them access to European streaming data.

SCREENDAILY

“ An absolute must independent analysis for industry professionals. Think data offers **valuable information** to understand the trends in SVOD consumption, the positioning of platforms at European level and reliable key indicators about the popularity of genre and contents.

**BUSINESS
INSIDER**

“ In order to analyse **consumption trends**, Think Data focuses on the country of origin and the genre of the titles, as well as whether viewership happens in or outside the home.

EL PAÍS

“ These reports will allow subscribers to **analyse the market with ease**, as they will take a close look at indie titles, the most iconic genres and European content.

 **cineuropa**

“ Think data will provide **data analytical reports** regarding the subscription video on demand (SVOD) viewership in different strategical countries.

 **AUDIOVISUAL451**
el medio online de la industria audiovisual

“ At last there will be data of **the streamer services** thanks to Think Data.

DECINE21

WHAT IS SODA

HOW WE DO WHAT WE DO...

In 2019, Digital i developed SoDA, our new SVOD viewing measurement system, starting with the biggest SVOD service in the world, Netflix. In 2020 we built upon the success of the project by launching measurement of Amazon Prime Video.

Much like TV audience measurement systems across the world, SoDA is a sample based system, however, our methodology is unique in the sense that it collects accurate viewing data that comes directly from the accounts of a fully managed panel.

The data we use is passively collected, meaning zero human error. Our methodology also means that we capture viewing across all devices (including the TV set) and also viewing to content that is recorded and viewed offline.

We are currently collecting this data from a sample of over 6250 accounts, this data is then processed through our system and weights are applied to make the viewing data representative of the subscriber bases in each territory. Our sampling methodologies have been verified by leading statisticians and are statistically robust.

The data allows us to interrogate SVOD viewing in great detail, including analysing total consumption, the lifecycle of content, binge viewing, series loyalty and much more.

The data is available through our online dashboard system which allows users to login and directly access and interrogate SVOD data with unprecedented flexibility.

The data is available in the following territories - UK, France, Germany, Spain and Italy.

All use of Digital i SoDA data in the press should be attributed as - Digital i - SoDA

Digital i's SVOD Measurement System SoDA



EDITORIAL

SOPHIA VAHDATI



The press blows hot and cold, but the decision from consumers is clear. Viewer habits have changed alongside entertainment technology and streaming platforms continue to eat further into the cake of total viewing time. The news that streaming had overtaken broadcast TV came first from Nielsen's recent Streaming Gauge publication, and as all European creatives know, what happens in the United States normally affects us. Netflix may not be growing their global subscriber-base, but the data in this report shows that they are clearly the market-leader in the SVOD space. Ergo, Netflix is the market-leader in a segment set to dominate the video sector.

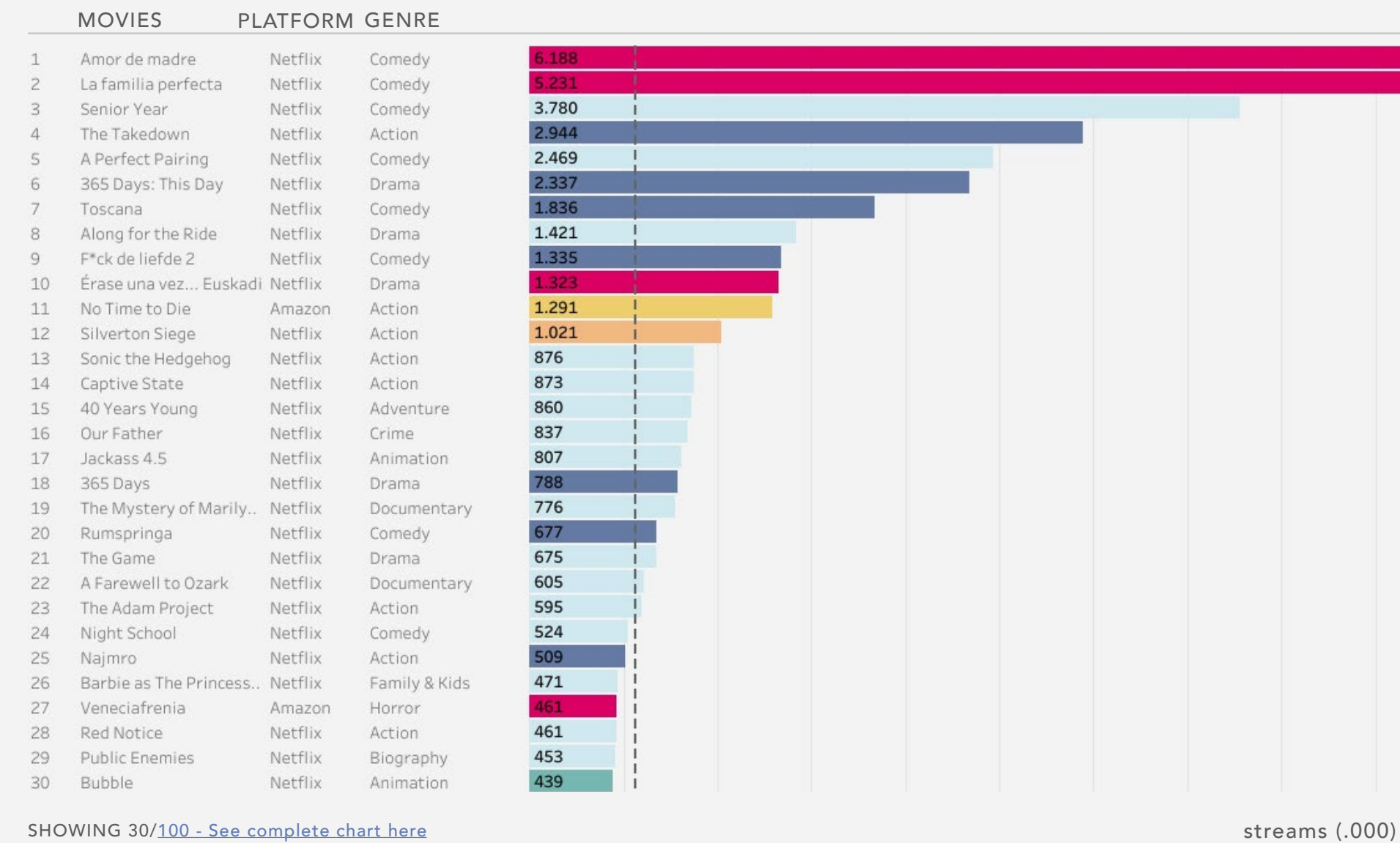
As Think Data point out in this report, Netflix's multi-pronged approach is the key to their success. The only time Prime Video content makes the top lists is when an outstanding piece of content pushes its way to the fore. They are having success with some localisation attempts in-market, nonetheless, they are winning small battles to ultimately lose the war. That said, looking ahead Prime Video has "The Boys", Amazon's answer to "Stranger Things", and then the highly anticipated "Lord of The Rings" series, "The Rings of Power" coming up... And that's after the acquisition of James Bond IP. Are we starting to see Prime Video doubling down on their content strategy?

So far in 2022, Digital i has expanded SoDA's measurement to five new European territories: Denmark, Sweden, Finland, Poland and the Netherlands. Once again, Think Data's key observations are true: Netflix holds steady control of the SVOD viewing share. Across 2023, SoDA will expand into further markets and cover more global platforms. Without a doubt, this month's issue speaks of opportunity for content creators, especially those working on Young Adult and Comedy projects. Know the market dynamics. Stay inside the viewing revolution.

Sophia Vahdati
Digital-i Marketing Director

SPAIN 100 MOVIES | OVERVIEW

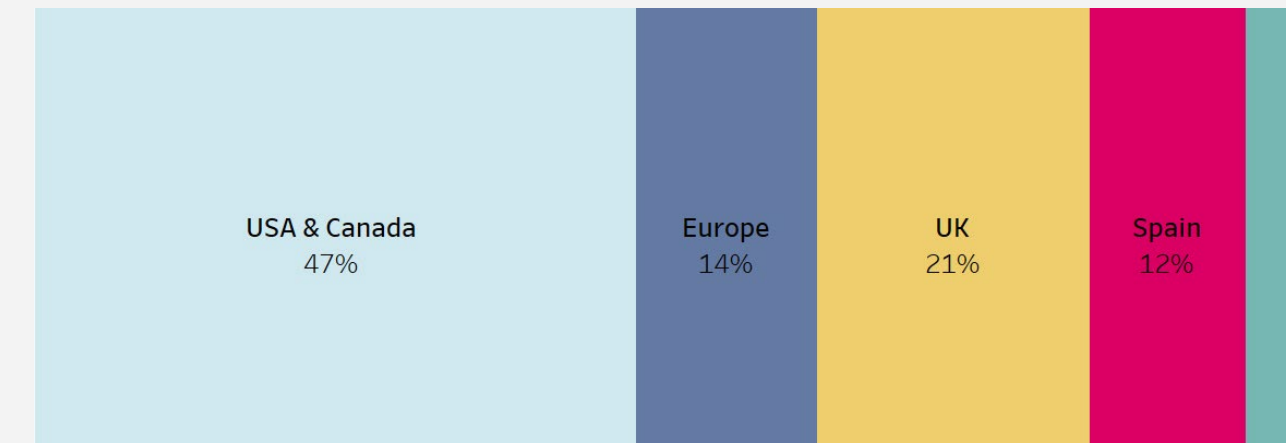
TOTAL STREAMS BY MOVIE NETFLIX - AMAZON



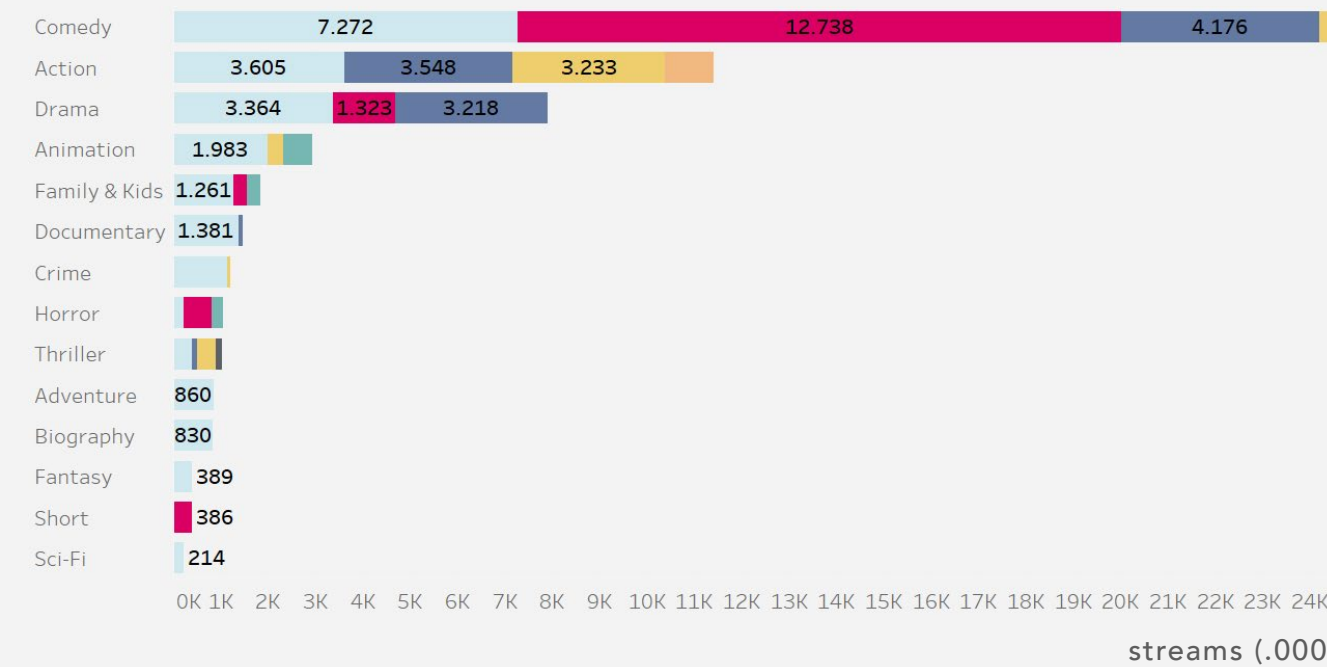
SHOWING 30/100 - See complete chart here

streams (.000)

CATALOG SHARE BY COUNTRY NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES NETFLIX - AMAZON



streams (.000)

COMEDIES CONQUERED THE TOP 3, LED BY LOCAL PRODUCTIONS

In the first position, we find "Mother's Love" the Netflix production starring two familiar and beloved faces of Spanish Comedy, Carmen Machi and Quim Gutiérrez, directed by a usual collaborator of the streaming Service, Paco Caballero ("The Neighbour"). The film was released on the 29th of April and quickly rose to #1. "La Familia Perfecta" directed by Cannes-selected Arantxa Etxebarria landed on Netflix on May 11 and conquered the #2 position after mild box office success in Spanish cinemas last December 2021, where it collected 1.3M €. The third position belongs to the American teen-comedy "Senior Year", starring Rebel Wilson.

JAMES BOND SAVES THE UK (CONTENT)...AGAIN

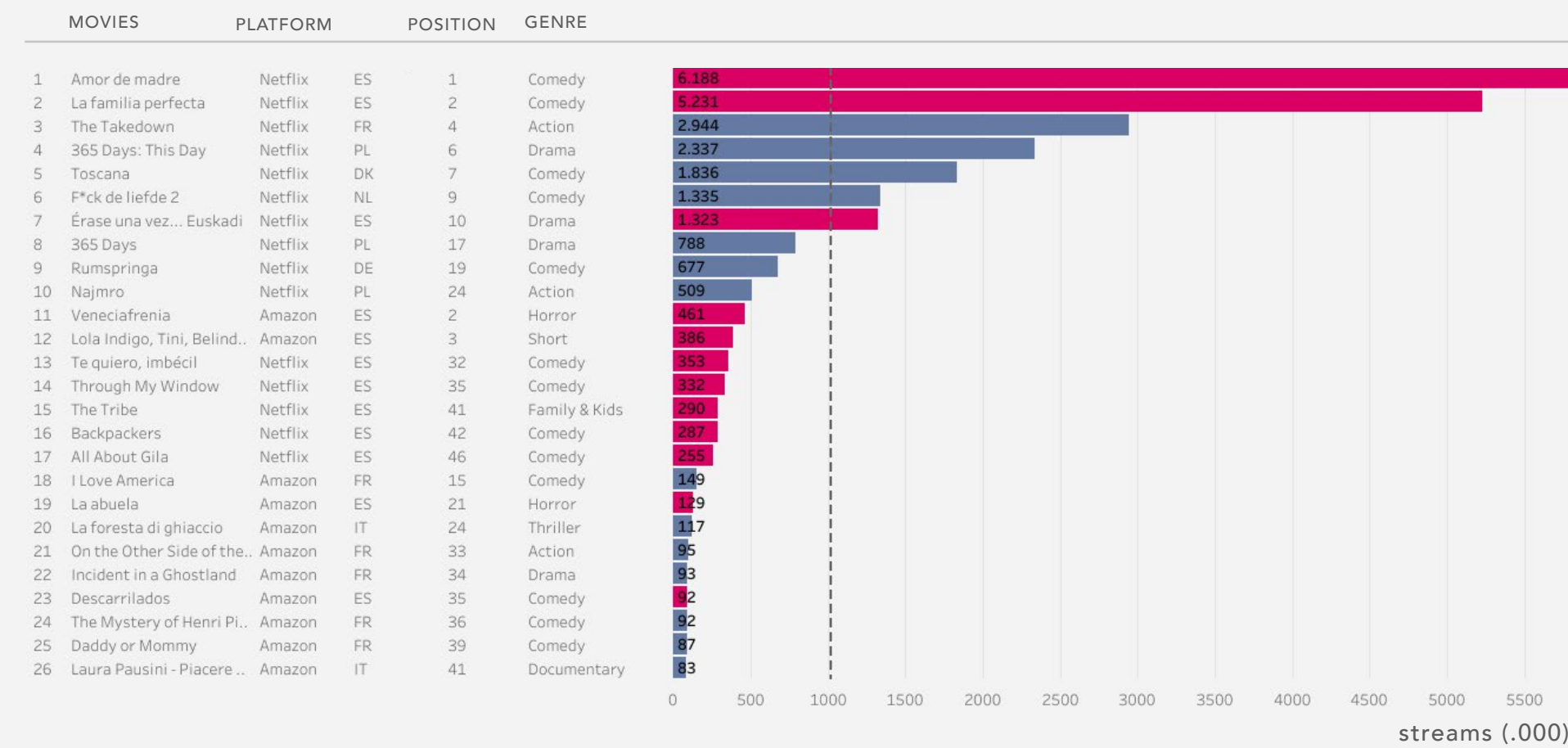
21% of the content in the TOP100 comes from the United Kingdom, 15% more than the previous month with a clear flagship represented by the last adventure of the most famous secret agent of all time: "No Time to Die". The new film of the 007 franchise was released in May on Primer Video, together with all the close to 30 previous instalments of the franchise, and accumulated 1.2 M streams during its first month. Classic movies from the 007 saga sneaked into the TOP 100, like "Spectre" (2015) at #49, "Casino Royale" #59, Quantum of "Solace" #61, "Skyfall" #62. When binge-watching, does age matter?

PRODUCTION COUNTRIES

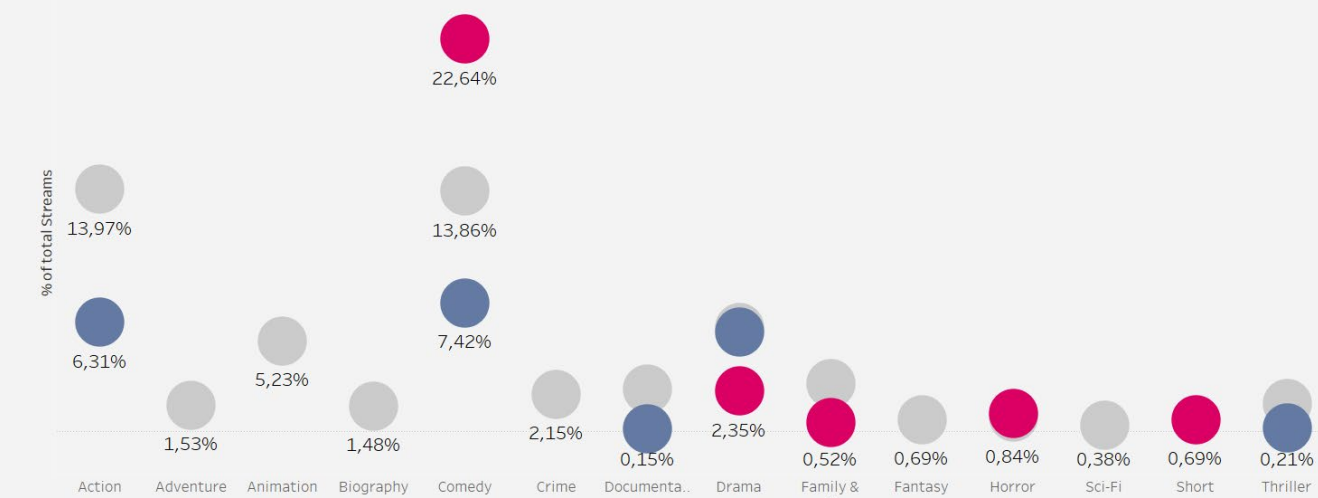


SPAIN 100 MOVIES | EUROPEAN FOCUS

LOCAL AND EUROPEAN MOVIES IN THE TOP 100 NETFLIX - AMAZON



CONTRIBUTION OF LOCAL & EUROPEAN MOVIES TO TOTAL STREAMS NETFLIX - AMAZON



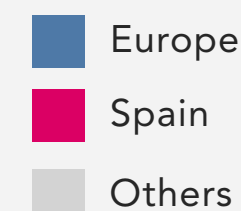
HALF OF THE TOP25 CHARTS ARE SPANISH PRODUCTIONS

The health recovery of Spanish productions identified in April continues during May, this time with two local comedies in the first two positions. It is worth noting that the following positions are all taken by sequels which ensure the crush that Netflix has for IPs. The "N" platform has been spending billions of dollars on its own line-up of Originals, and the best way to capitalize on the efforts is to provide the fans with a second instalment of some of the most successful movies on the platform: "The Takedown" (#4, 2.9M), "365 Days: This Day" (#6, 2.3M views) or "F*ck the liefde 2" (#9, 1.3M) are some examples of it.

DRAMA IS BARELY REPRESENTED WITH ONLY 4 TITLES

The flagship of Drama is the Spanish 1980s friendship drama 'Once Upon a Time in Euskadi' which accumulated over 1.2M streams. Two of which are the romantic Polish drama "365 Days" and its sequel "365 Days: This Day".

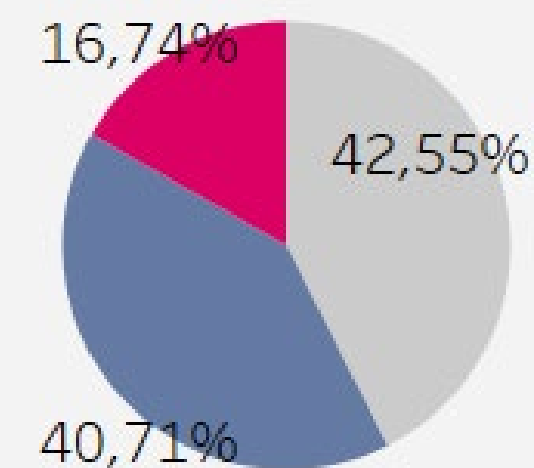
PRODUCTION COUNTRIES



NUMBER OF TITLES BY GENRES NETFLIX - AMAZON

GENRE	EU	SPAIN
Action	3	
Comedy	6	7
Documentary	1	
Drama	3	1
Family & Kids		1
Horror		2
Short		1
Thriller	1	

CONTRIBUTION TO DRAMA STREAMS

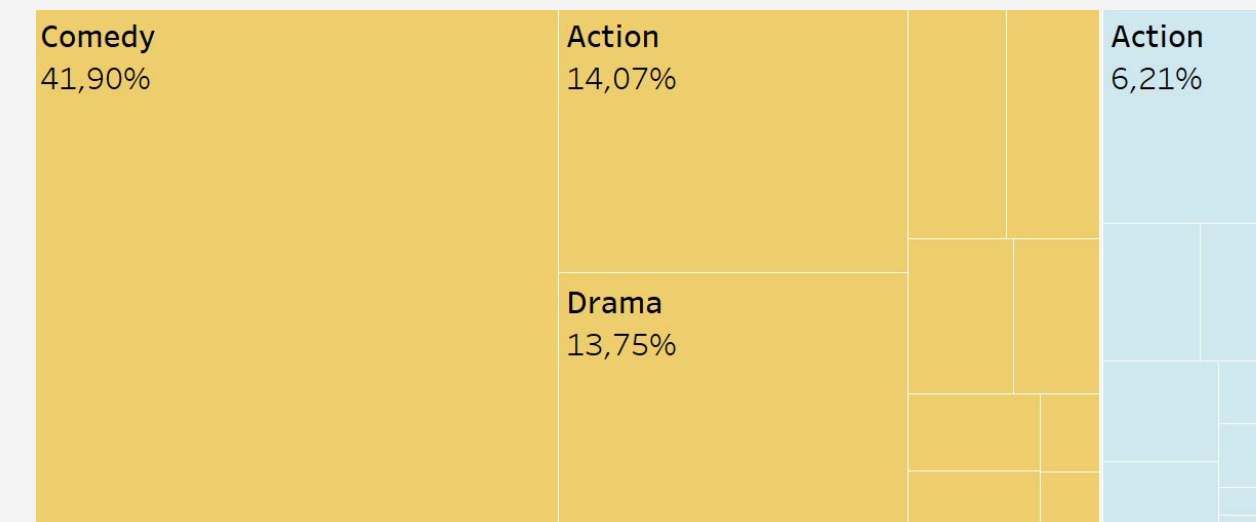


SPAIN 100 MOVIES | SVOD PLATFORMS

TOP MOVIES STREAMS BY GENRES



MOST WATCHED GENRES SHARE BY PLATFORM



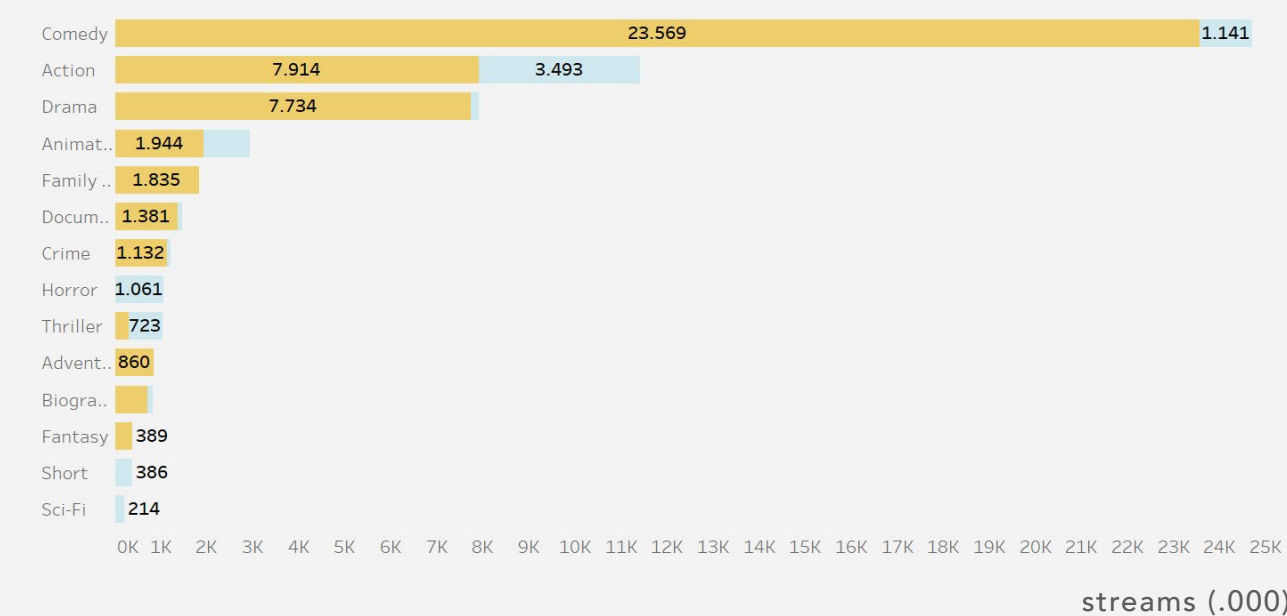
COMEDY TURNED THE TABLES ON ACTION, BECOMING THE MOST VIEWED GENRE ON NETFLIX WITH 41.90% OF THE SHARE

There are three works clearly responsible for making comedy the most watched genre in Spain: "Mother's Love", with 6.1M views, "La Familia Perfecta" with 5.2M and "Senior Year" with 3.7M. In total this genre has gathered over 23M streams. Actions follow with only with 14.1 % of the share (13% less than in the previous month) and Drama with 13.75% of the share.

Focusing on action, although "No Time to Die" represents the biggest success in May for Prime Video, the French action-comedy "The Takeover" starring Omar Sy has defeated James Bond, gathering 2.9M streams.

On Amazon, on the other hand, Action is still the most popular genre, with 6.21% of the share and it's basically thanks to the decision of Prime Video to launch the whole James Bond saga coinciding with the release of "No Time to Die".

TOTAL STREAMS BY GENRES PLATFORM COMPARATIVE



DRAMA CONQUERED A GRATIFYING THIRD POSITION ON THE PODIUM OF THE MOST WATCHED GENRES

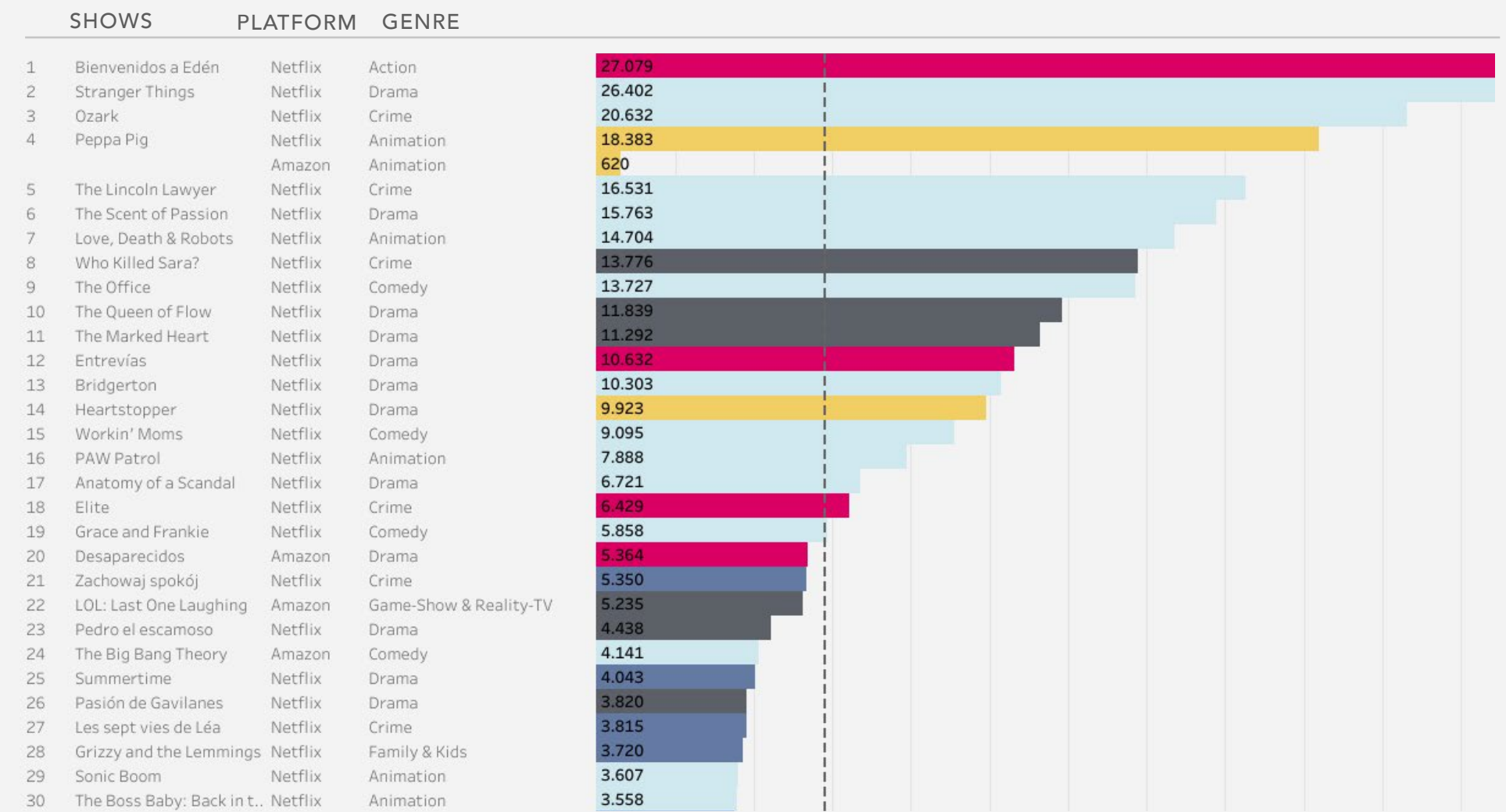
thanks to the sequel of the Polish erotic-drama "365 Days", "365 Days: This Day". The launch of the sequel has also brought to the surface the first instalment of the film with 788K views. The film was originally released in 2020 and became the most watched Polish film to date. Two other titles deserve a moment: the Teen Drama based on The New York Times bestseller "Along with the ride", and, the Spanish drama "Once Upon a Time in Euskadi", both performing above average.

OTT

- Amazon
- Netflix

SPAIN 100 SHOWS | OVERVIEW

TOTAL STREAMS BY SHOW NETFLIX - AMAZON



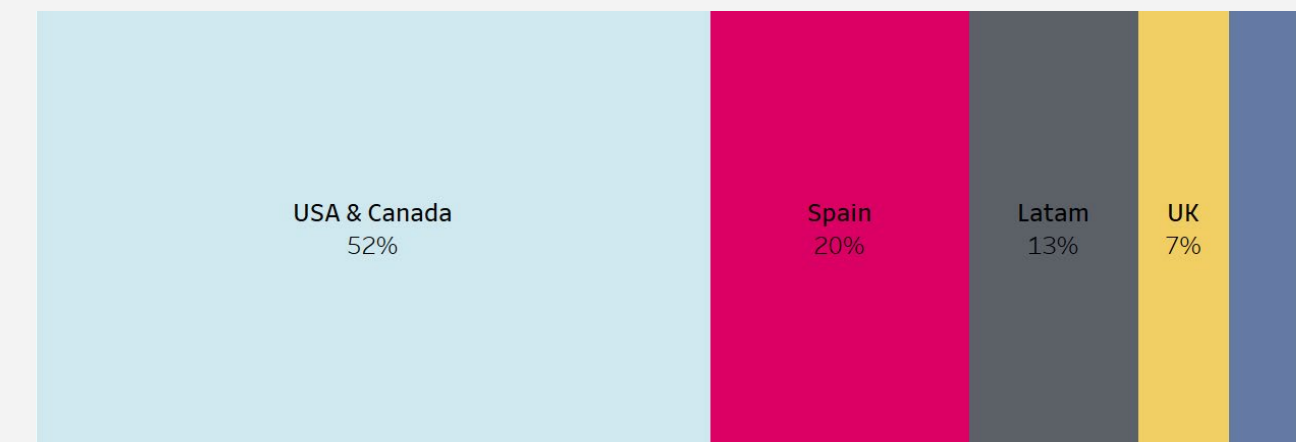
SHOWING 30/100 - See complete chart here

streams (.000)

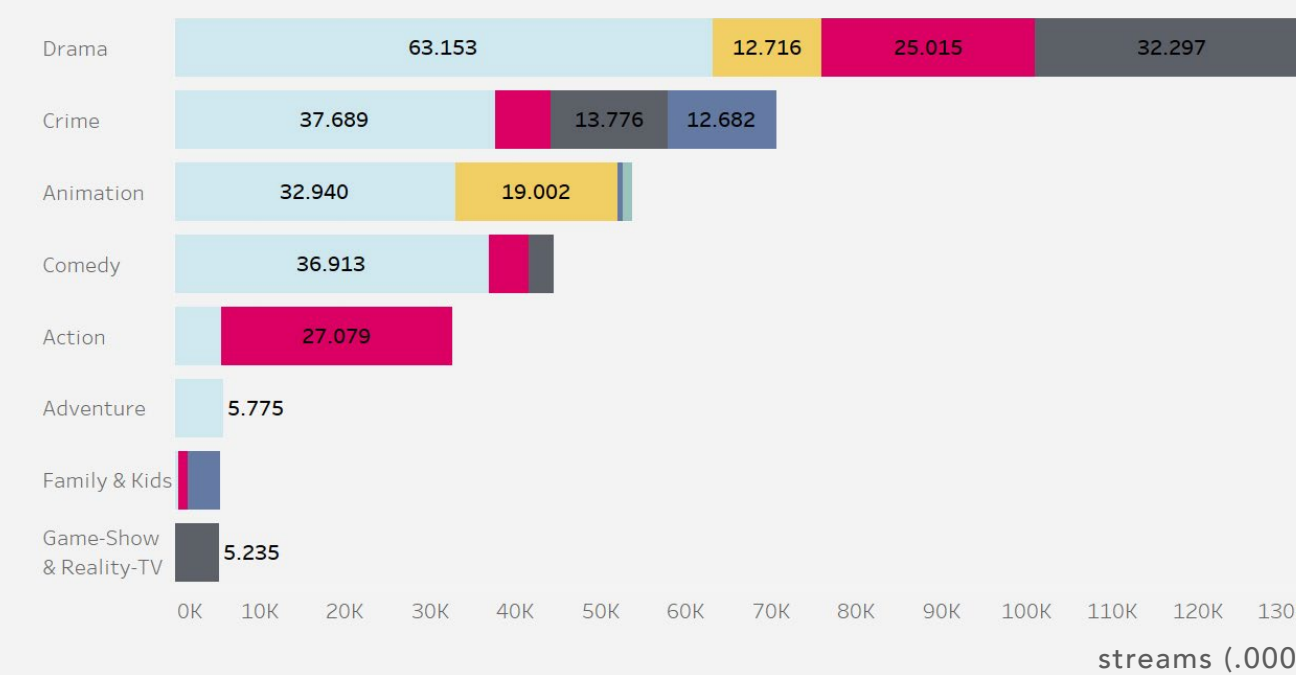
PRODUCTION COUNTRIES



CATALOG SHARE BY COUNTRY NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES NETFLIX - AMAZON



THE TOP3 SHOWS CUMULATED STREAMS SUFFERED A DROP OF 28% IN MAY.

The cumulative streams of the three most watched shows reveal almost 30M views less than their homonyms in the past month. American content continues to rule the roost with 52% of the share (3 points more than the previous months), dominating the charts with "Stranger Things" and "Ozark" ahead of the field. As a result, the most streamed genre during the month of May is, once again, drama, with 137M streams in total.

SPANISH TEEN DRAMA "BIENVENIDOS A EDÉN" DEFEATS AMERICAN CONTENT, REACHING POSITION #1

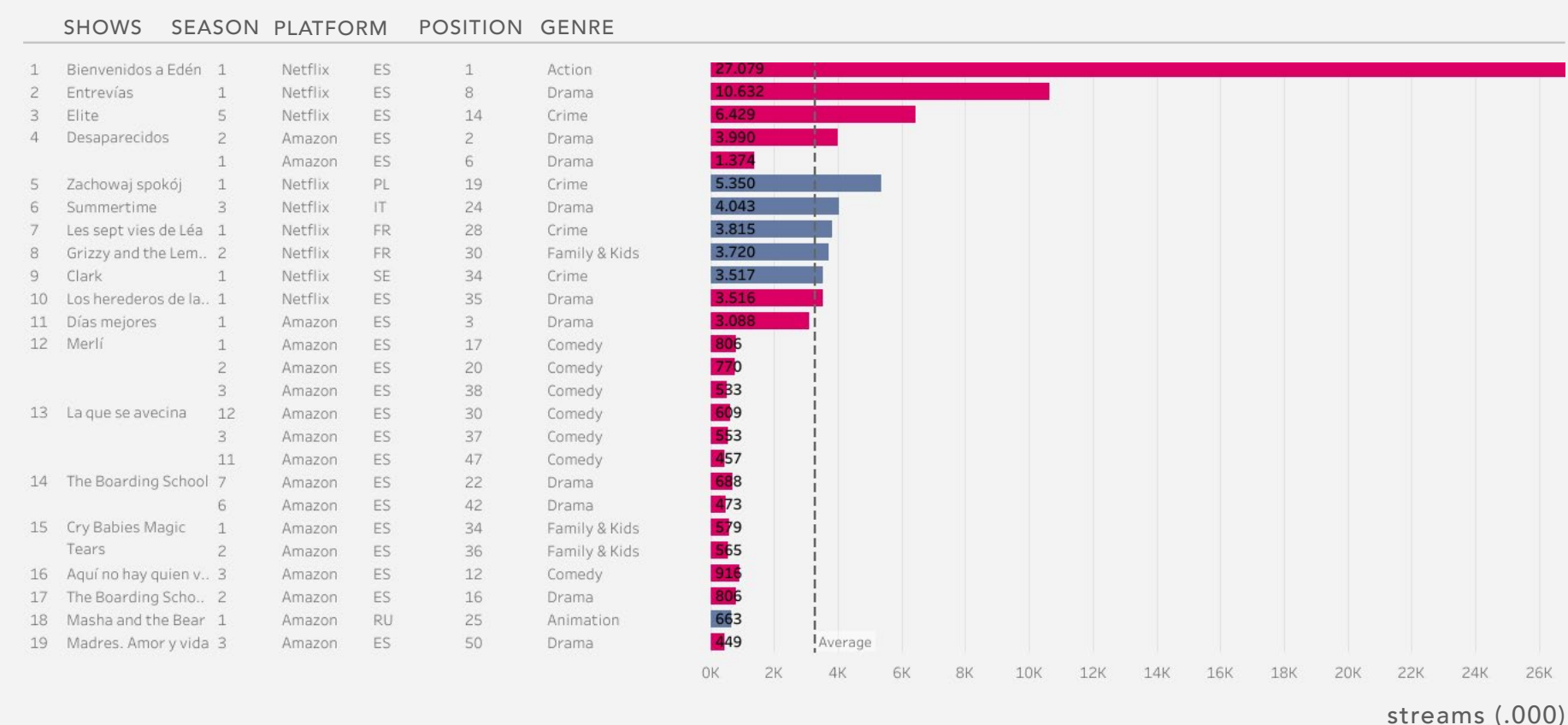
The first season of the new teen-ish Netflix bet arrived on the platform on May 6, accompanied by a big buzz on social media and an impressive influencers campaign. These marketing efforts paid the bills, bringing some 27M domestic streams. In position #2 we find the first seven episodes of the fourth season of "Stranger Things". The popular American Series released on May 27 quickly reached position #2 of the most streamed series. This time the fans of the kids from Hawkins didn't have the chance of binge-watching the whole season due to Netflix's new strategy of dividing the season into two instalments to be released in May and July. The same strategy was followed with the second instalment of the final season of "Ozark", released on April 29, which conquered the third position on the chart with 20.6M streams.

TELENOVELAS YIELD TO OTHER TYPES OF CONTENT

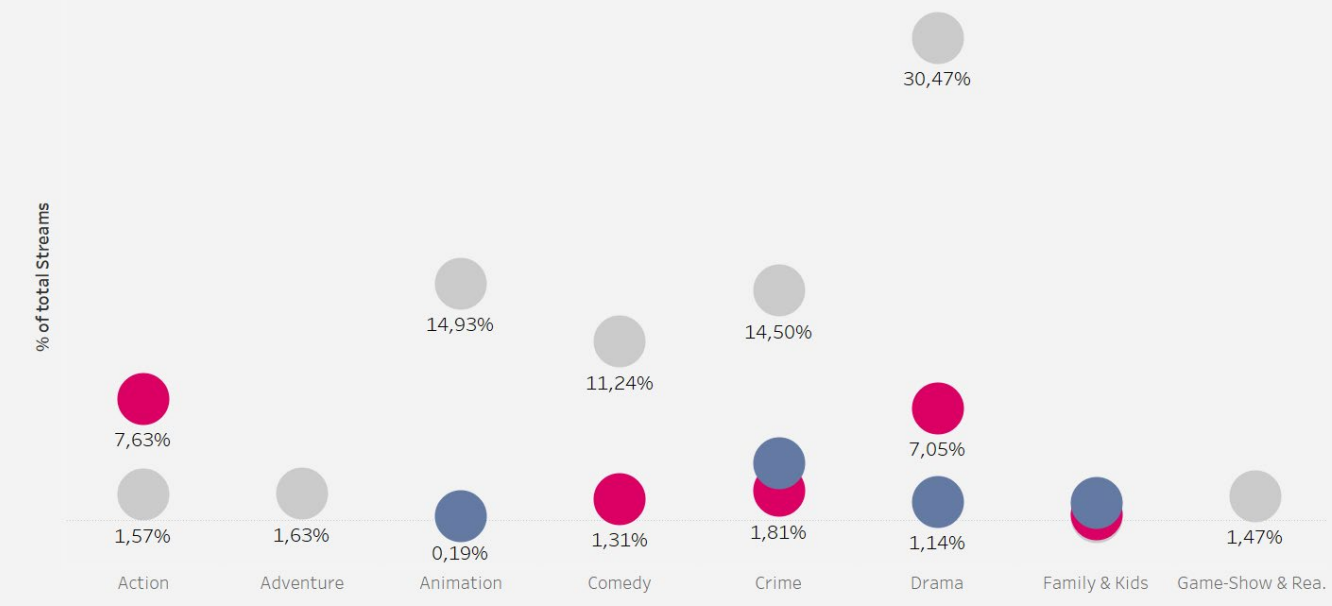
Telenovelas are leaving the first positions of the chart, waiting for new content to be released and making room for other genres like Drama, Action or Crime.

SPAIN 100 SHOWS | EUROPEAN FOCUS

LOCAL AND EUROPEAN SHOWS IN THE TOP 100 NETFLIX - AMAZON



CONTRIBUTION OF LOCAL & EUROPEAN SHOWS TO TOTAL STREAMS NETFLIX - AMAZON



SPANISH CONTENT DOMINATES THE CHART OF MOST STREAMED EUROPEAN SHOWS WITH 68% OF SHARE WITH “BIENVENIDOS A EDÉN” AS ITS MAIN FLAGSHIP, MAKING AN IMPRESSIVE DEBUT

13 of the 19 titles included in the list of European shows in the TOP100 are Spanish, and this month the battle between Amazon and Netflix is quite balanced, with Amazon managing to sneak into the first positions thanks to the release of the second season of “Desaparecidos”, the Cop series produced by Mediaset.

CRIME IS SPANISH AUDIENCES' FAVOURITE IMPORTED GENRE

When it comes to opening up the boundaries to the European neighbours, Crime seems to be the most appealing genre for the local audience: 3 of the 6 non-Spanish shows on the list are labelled as Crime: “Hold Tight” from Poland, “Les 7 vies de Léa” from France and “Clark” from Sweden.

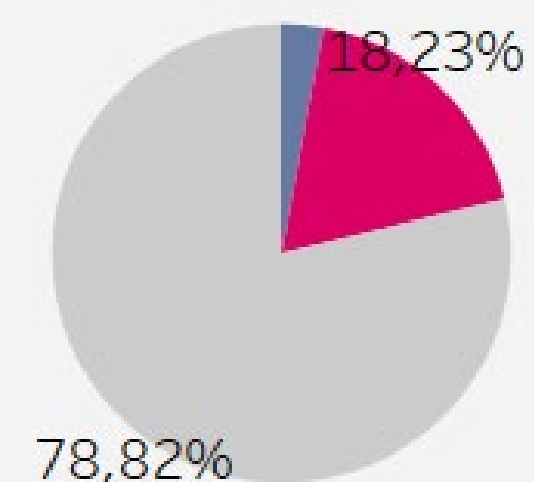
PRODUCTION COUNTRIES



NUMBER OF TITLES BY GENRES NETFLIX - AMAZON

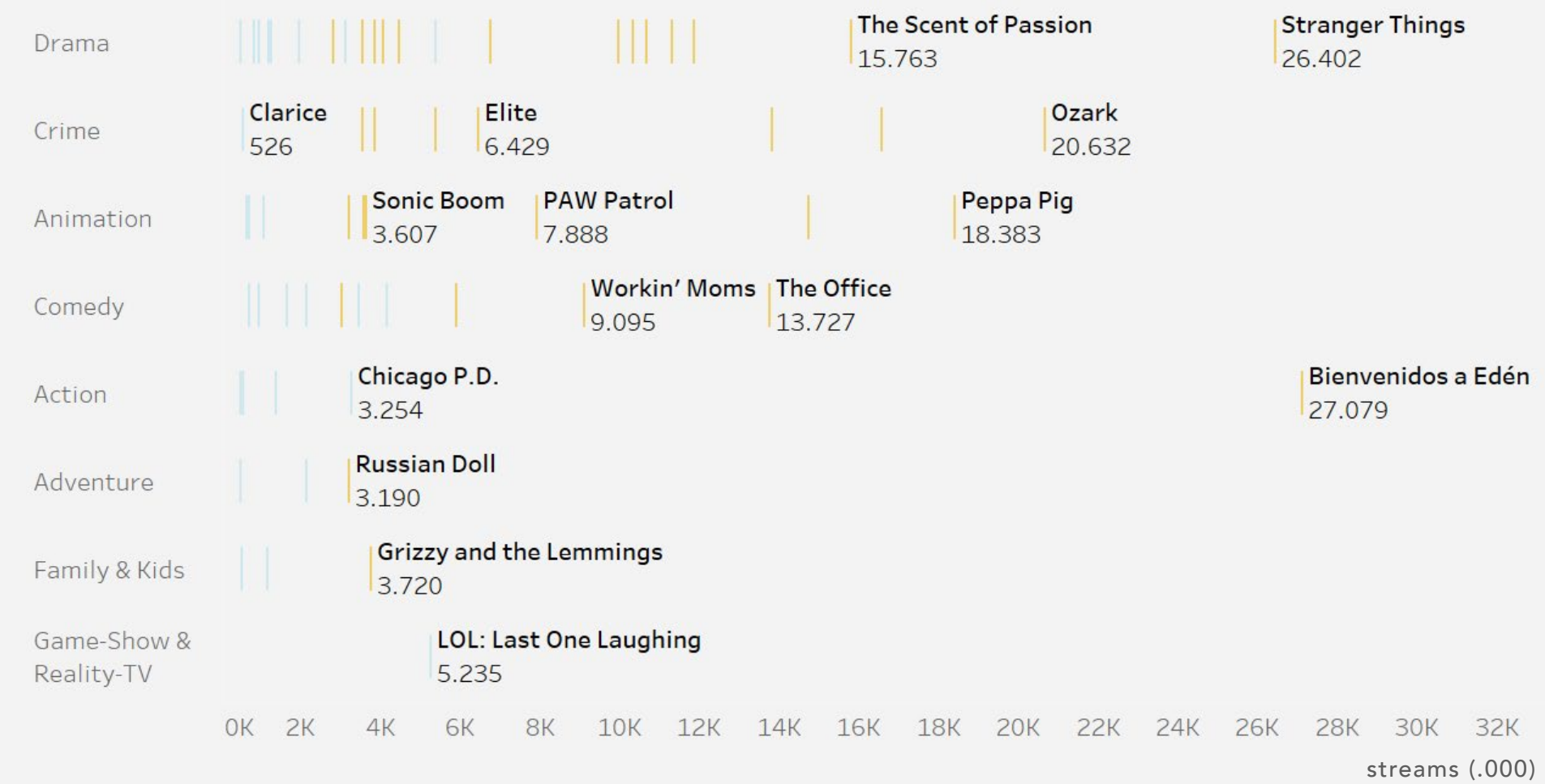
GENRE	EU	SPAIN
Action		1
Animation	1	
Comedy		3
Crime	3	1
Drama	1	7
Family & Kids	1	1

CONTRIBUTION TO DRAMA STREAMS

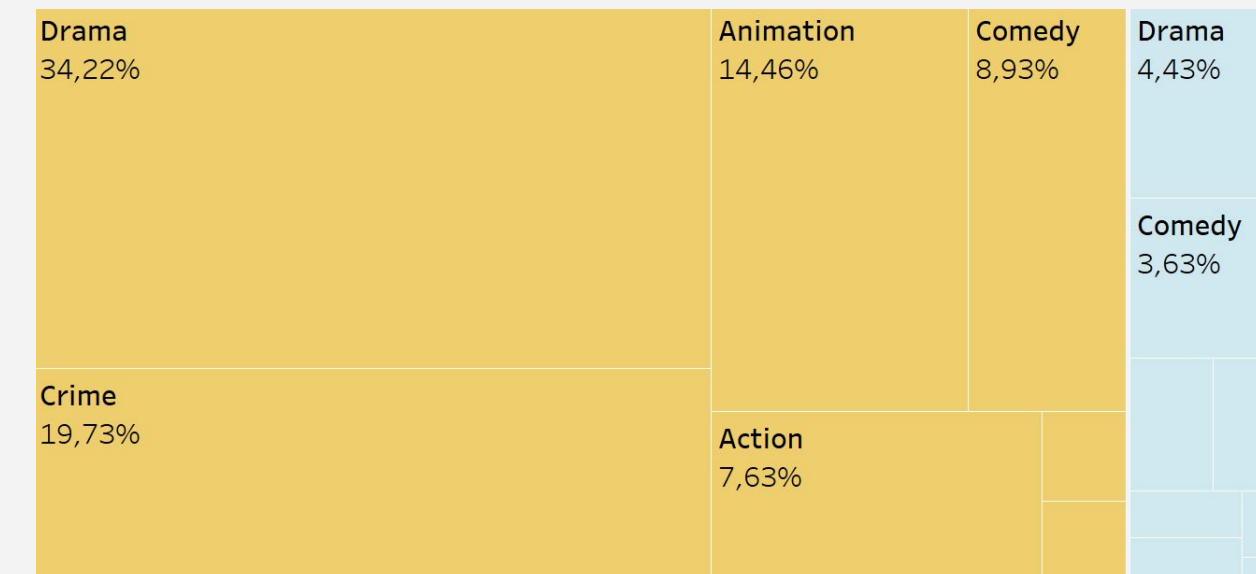


SPAIN 100 SHOWS | SVOD PLATFORMS

TOP SHOWS STREAMS BY GENRES



MOST WATCHED GENRES SHARE BY PLATFORM



DRAMA TAKES THE BIGGEST SLICE OF THE CAKE ON NETFLIX AND AMAZON SINCE APRIL

Although this genre has experienced a slight decline compared to April's results, Drama is undoubtedly the healthiest genre, with "Stranger Things", "Scent of a Woman" and "The Queen of Flow" spearheading the movement on Netflix, and Spanish Cop Drama "Desaparecidos" doing likewise on Amazon.

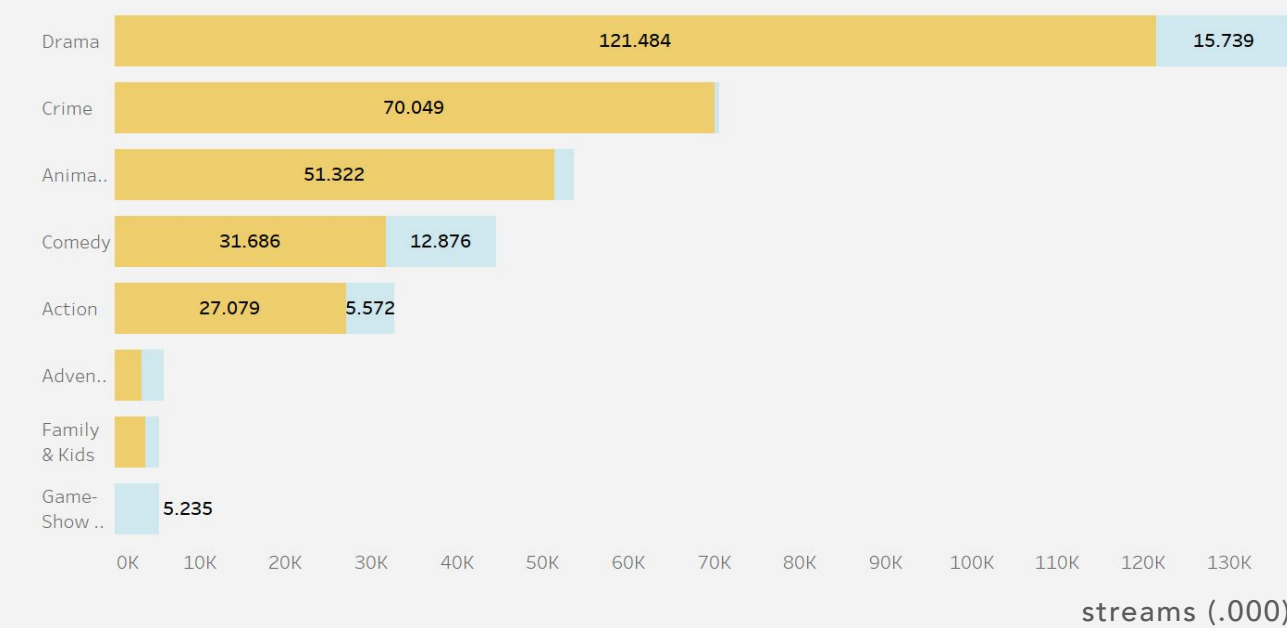
NETFLIX'S AUDIENCE LOVES AN UNRESOLVED CASE: CRIME GENRE GAINS GROUND ON DRAMA, INCREASING ITS SHARE 6 POINTS

This month this genre cumulates 70M streams, with "Ozark" in the lead, followed by "The Lincoln Lawyer" and "Who Killed Sara?".

AMAZON'S LEADERSHIP IN COMEDY LOSES TRACK IN MAY

Last month we observed how Amazon, after months of gaining ground on Netflix, finally doubled Netflix's Comedy results, and we wondered if Amazon would keep up with it in the upcoming months. The beloved American adaptation of "The Office" re-acquired by Netflix in October, heads the movement, followed by other Netflix comedy classics like "Workin' Mums" and "Grace and Frankie".

TOTAL STREAMS BY GENRES PLATFORM COMPARATIVE



OTT

- Amazon
- Netflix

HOT CONTENT IN SPAIN

BIENVENIDOS A EDÉN - THE NETFLIX ORIGINAL IS DESIGNED TO BECOME THE NEXT GLOCAL PHENOMENON FOLLOWING "ELITE".

On May 6, Netflix launched the complete first season of what is meant to be the platform's next teenage hit: "Bienvenidos a Edén". The recipe smells of success: a striking premise focused on a high concept that evokes "Lost", already being called a TV classic, and a very attractive cast formed by young and beautiful talents gathered on an idyllic island. The trailer promises tons of beauty, parties on the beach, love affairs and mystery, all packed in with electronic music and a dystopian atmosphere - drones, lightning bracelets and neon lights.

The series departs from the premise: Are you happy? With this question, Zoa and four young and attractive influencers are invited to the most exclusive party in history, set in a secret island and organized by the brand of a new drink. What starts as an exciting adventure will soon turn into the trip of their lives.

It has a broad cast formed by stars like Amaia Aberasturi ("Akelarre"), Lola Rodríguez ("Veneno"), Berta Vázquez ("Vis a vis"), Begoña Vargas ("Las leyes de la frontera"), Sergio Momo ("Élite"), familiar faces like Amaia Salamanca ("Sin tetas no hay paraíso") or Guillermo Pfening ("Foodie Love") and the singers, Ana Mena and Belinda. Joaquín Górriz (Desaparecidos) and Guillermo López (Atrapada) are the scriptwriters, and Daniel Benmayor (Xtremo) and Menna Fité (Merlí) the directors.

It is undeniable that Netflix has big expectations for this show, hoping that it will become the winning horse to save the numbers and stop the fall in subscribers. The series arrived in a Spring season marked by the release of the fifth season of "Elite", and proved to be a more than tasty snack to overcome the feeling of emptiness after the end of "Elite".

Netflix fuelled the release of "Bienvenidos a Edén" with a very expensive marketing campaign: they took a plane, customized it with the look and feel of the series, filled it with influencers and flew them to a luxury hotel in Ibiza, all expenses paid and an appointment for a private show of Ana Mena at sunset. Among the influencers: we find Paula Gonu, Twin Melody, Victoria Caro, Sara Fructusos, Jonan Wiergo, Luc Loren, Nil Ojeda, Oto Vans, Melyssa Pinto, Sofía Suescun and Madame de Rosa, to name a few. This overambitious, marketing action with many zeros behind it only confirms Netflix's intentions for the series to live up to the plan that the strategic board has created for it. The results? Spanish and European audiences have bowed to this dystopic thriller and "Bienvenidos a Edén" has amassed close to 68M cumulated streams during its first month, conquering the first positions of the chart in all the five analysed countries: it climbed up to position #1 in Spain with 27M views, position #4 in France with 18.6M streams, #5 in Germany with 13.8M streams, #6 in Italy with 10.6M streams and #16

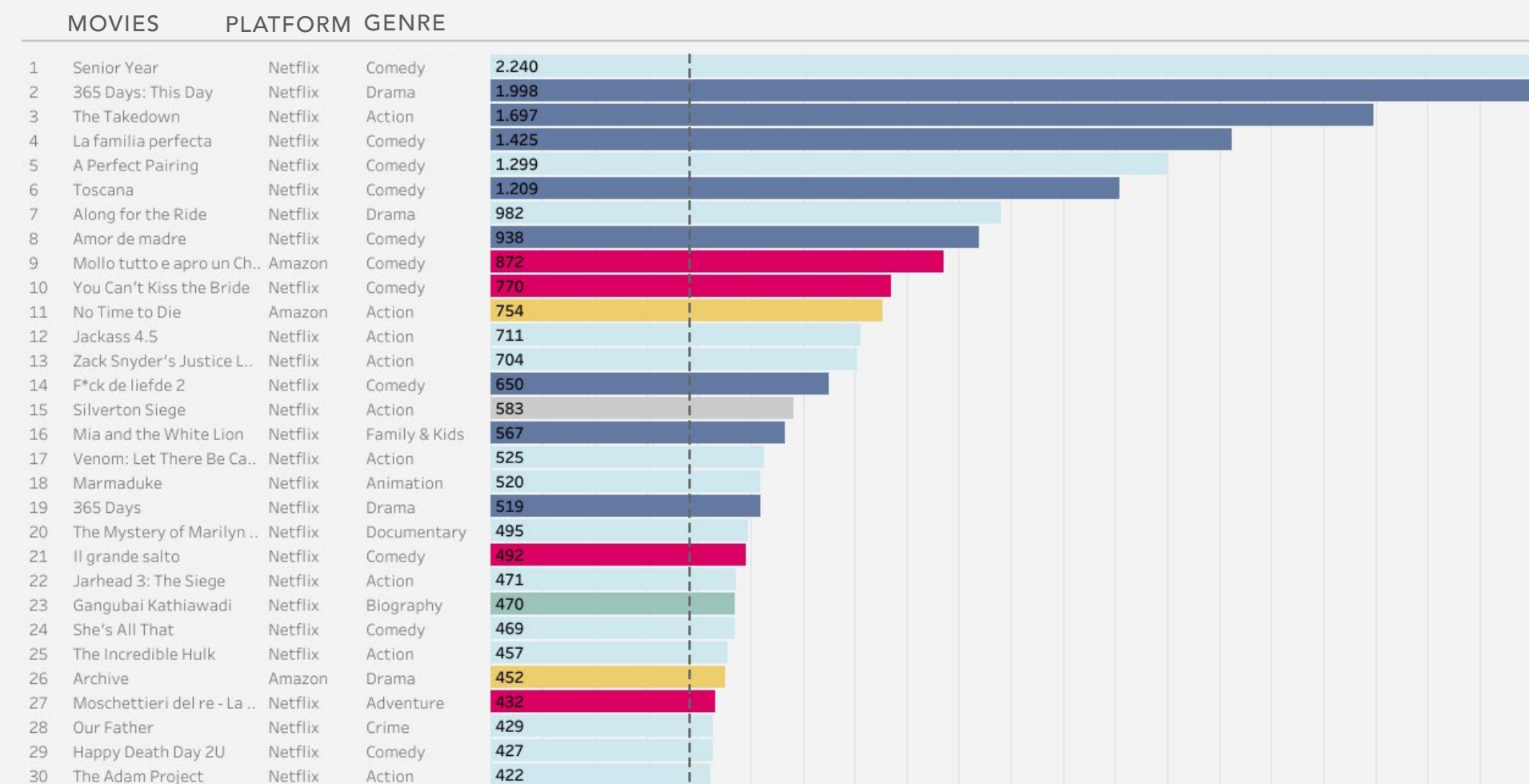
in UK with 7.9M streams. The critics hated it, pointing to a lack of ambition and a minimum concern with quality in the platform's development of projects, but who cares with such impressive figures?

Only a few days after its release, Netflix confirmed that they are already cooking the second season. Will "Bienvenidos a Edén" become Netflix's next international phenomenon in Spanish? We guess we will need to wait until season two to answer this question but it certainly is a very promising start.



ITALY 100 MOVIES | OVERVIEW

TOTAL STREAMS BY MOVIE NETFLIX - AMAZON



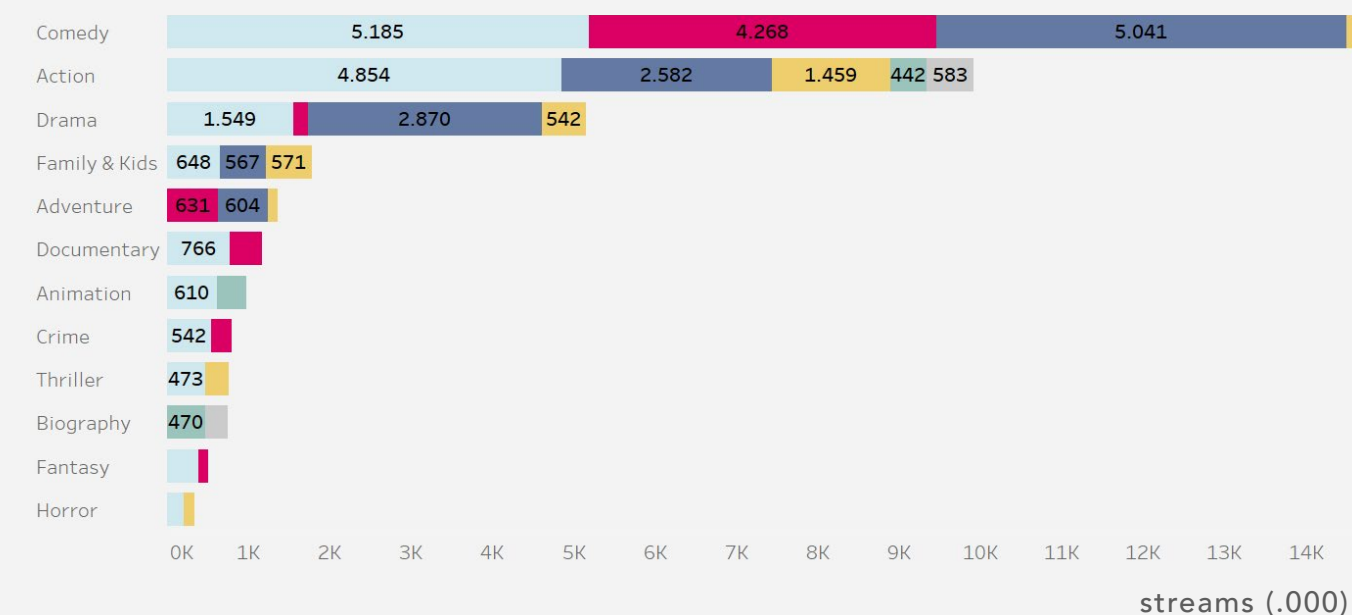
SHOWING 30/100 - [See complete chart here](#)

streams (.000)

CATALOG SHARE BY COUNTRY NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES NETFLIX - AMAZON



streams (.000)

PRODUCTION COUNTRIES



TOP #5 CUMULATED VIEWS REACHED 8.6M, 1M UP ON THE PREVIOUS MONTH

May's leading position belongs to the American high school comedy "Senior Year", starring Rebel Wilson, with 2.2M streams. Hard on its heels we find in position #2 the Polish erotic drama "365 Days: This Day", the sequel to the biggest Polish success to date "365 Days". In position #3 "The Takeover" also closely follows, with 1.6M.

US CONTENT WITHDREW WITH A 37% SHARE, 15% LESS THAN THE PREVIOUS MONTH, WHEREAS THE UK SHOWS A SIGNIFICANT INCREASE

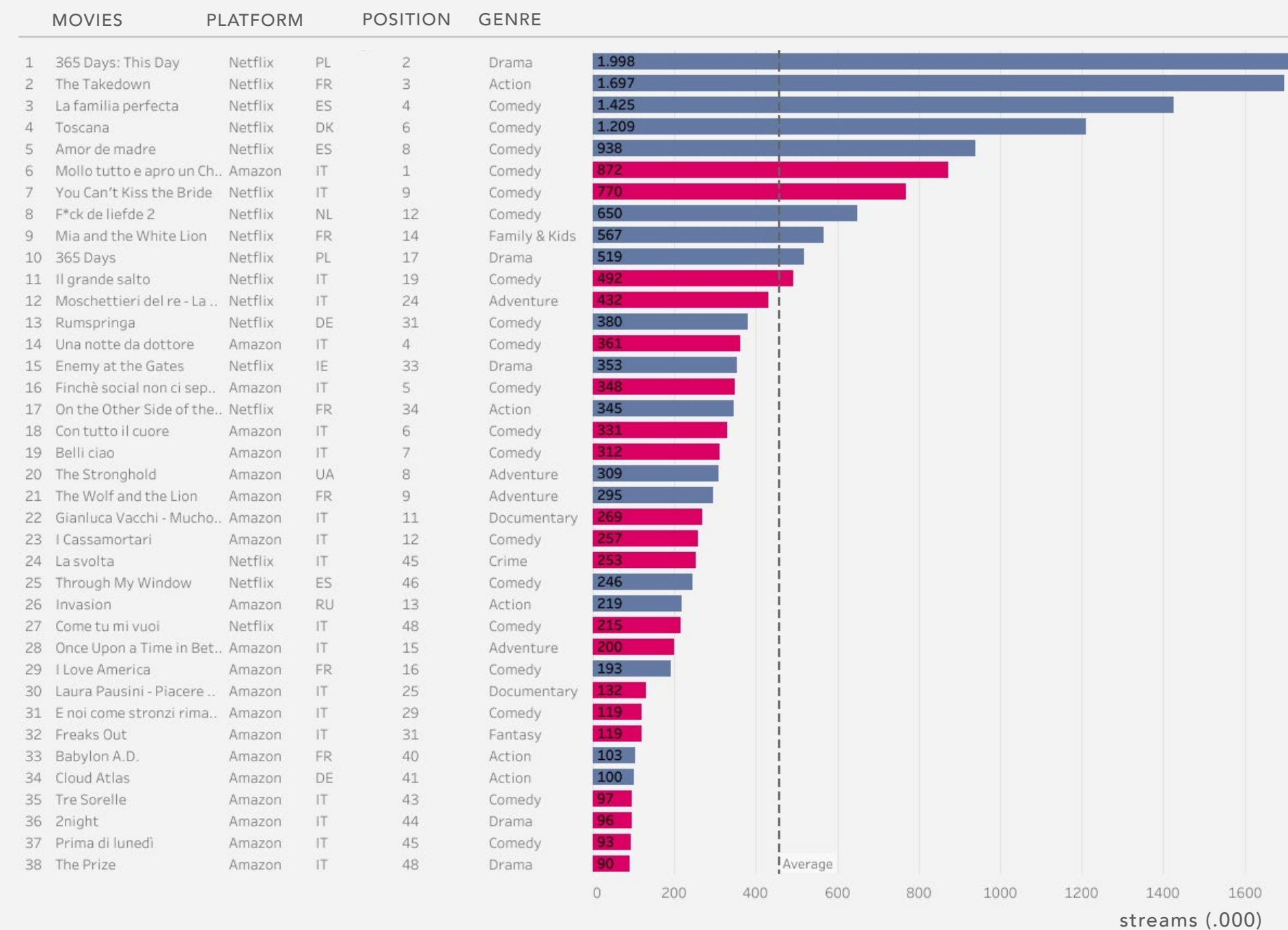
This happens mainly thanks to the release of the 007 saga, including the last instalment, "No Time to Die", which accumulated 754K streams in position #11 (a quite modest mark compared to Spanish results). In May, the British secret agent partnered with the most beloved magician of all times to give a shot in the arm to UK content: 6 out of 18 UK titles are Harry Potter instalments, and another six belong to the 007 sagas.

ITALIAN CONTENT GAINED GROUND OVER AMERICAN CONTENT WITH 20% OF THE SHARE, +10 POINTS SINCE APRIL

Comedy is undoubtedly the most watched local content, with two titles sneaking into the last positions of the TOP 10: "Mollo tutto e apro un Chiringuito", the comedy based on a fictional character viralized on the internet (Sr. Imbruttito), was released in December in Italy taking 728K€ at the box office, and later arrived in May on Prime video. In position #10, we find the Italian wedding comedy "You Can't Kiss the Bride", originally released in cinemas in 2019.

ITALY 100 MOVIES | EUROPEAN FOCUS

LOCAL AND EUROPEAN MOVIES IN THE TOP 100 NETFLIX - AMAZON

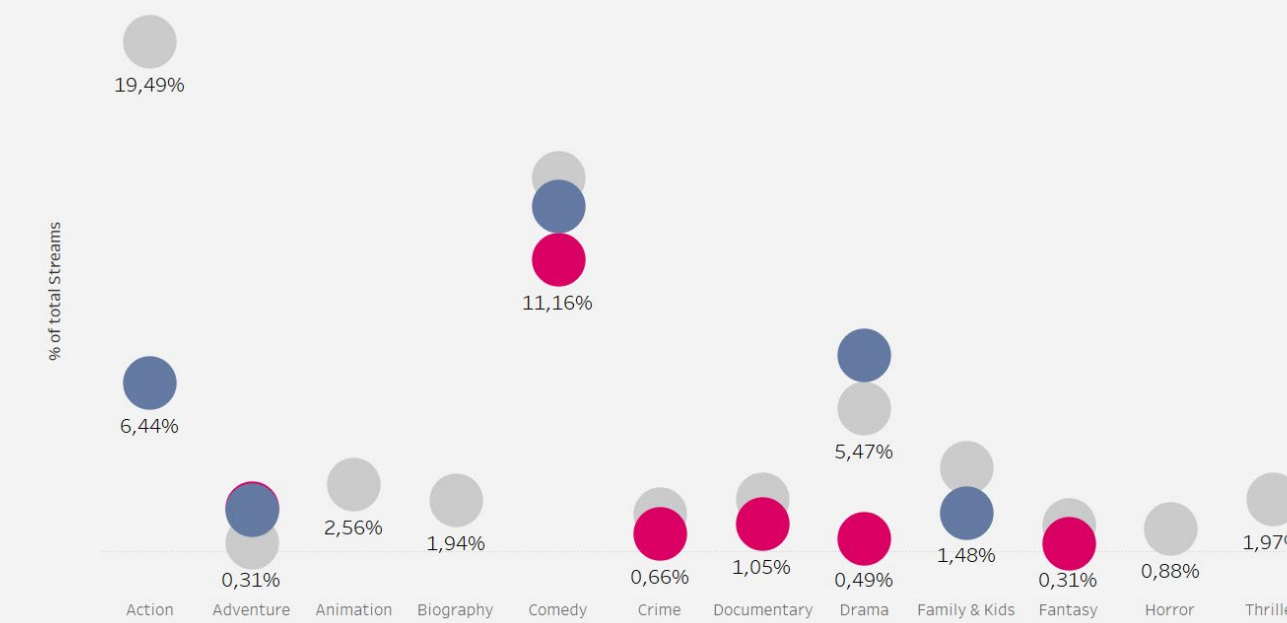


PRODUCTION COUNTRIES



CONTRIBUTION OF LOCAL & EUROPEAN MOVIES TO TOTAL STREAMS

NETFLIX - AMAZON

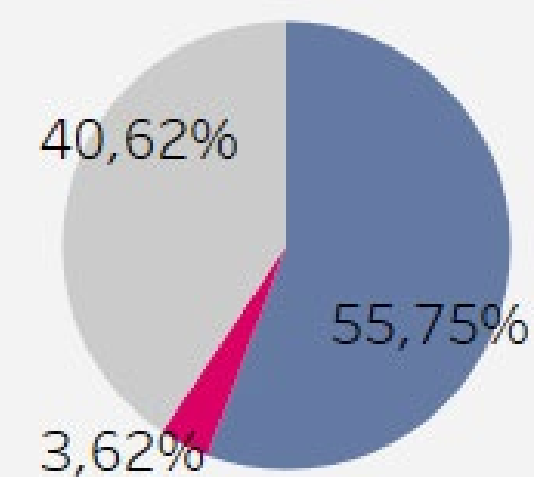


NUMBER OF TITLES BY GENRES

NETFLIX - AMAZON

GENRE	EU	ITALY
Action	5	
Adventure	2	2
Comedy	7	12
Crime		1
Documentary		2
Drama	3	2
Family & Kids	1	
Fantasy		1

CONTRIBUTION TO DRAMA STREAMS



ITALY GAINS CONTROL OF ITS LOCAL CONTENT: FROM THE 38 EUROPEAN TITLES FOUND IN THE TOP100 CHART, 20 ARE ITALIAN PRODUCTIONS

Worthy of mention is the fact that 12 of them are comedies, but surprisingly enough, these titles don't occupy the first position on the list: Polish Drama "365 Days: This Day" is the most watched non-American film in Italy with 1.9M views, followed by the French Action-Comedy "The Takedown". The next three positions belong to Spanish comedies: "La Familia Perfecta", and "Amor de Madre; and Danish comedy "Toscana".

STREAMING PLATFORMS PROVE THAT FOREIGN COMEDIES DO TRAVEL

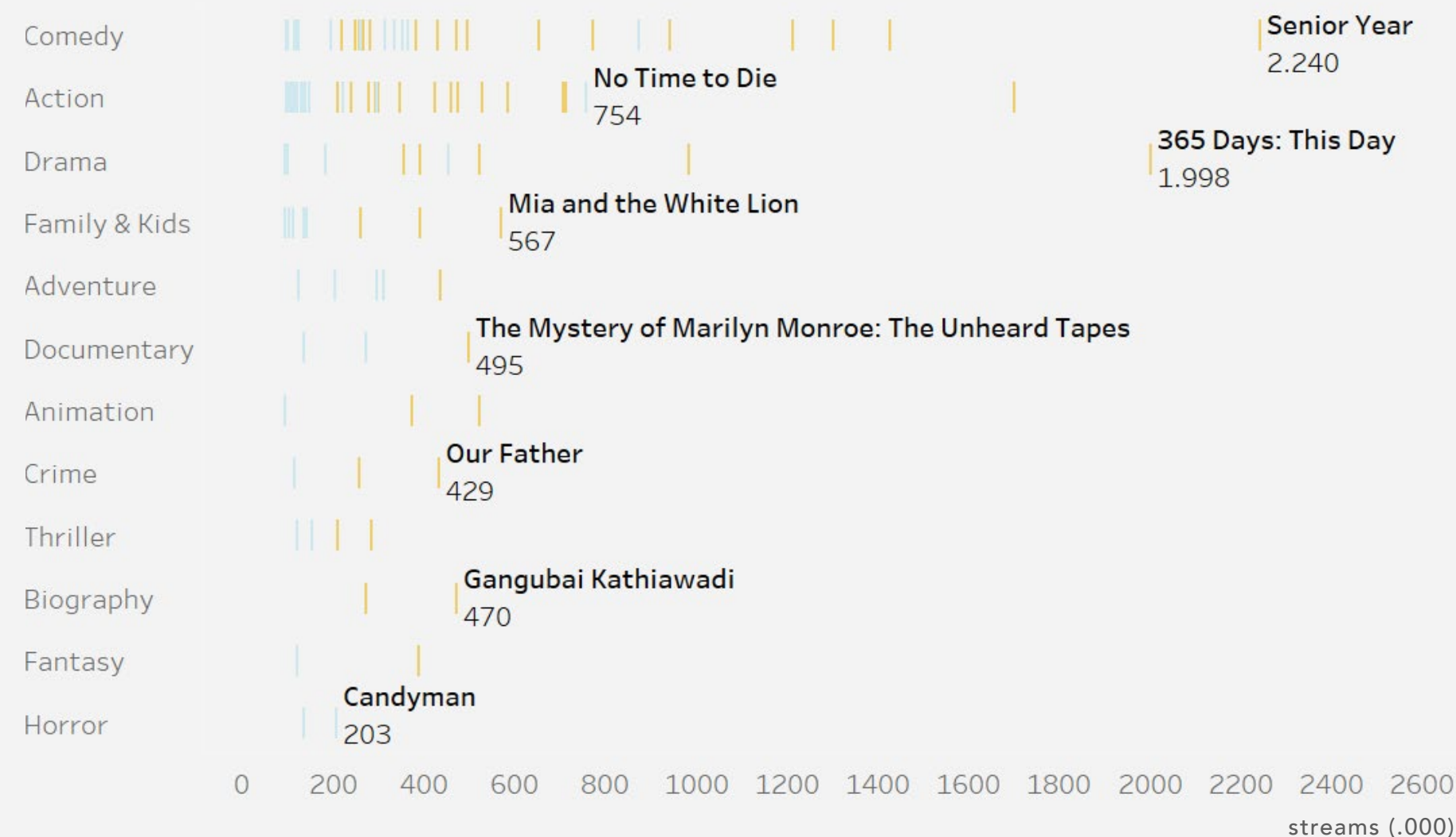
we have always heard that local humour is hard to understand when travelling abroad. Well, if we take a deep look into the European titles labelled "Comedy" films, we find a diversity of origins and languages: besides the above mentioned Spanish titles, we find the Dutch comedy "F*ck the liefde", the Danish comedy, "Rumspringa", and the French comedy, "I Love America".

AND DRAMA? ONLY 5 TITLES FROM THE 38 NON-AMERICAN FILMS ON THE LIST ARE DRAMA, AND ONLY TWO ARE ITALIAN

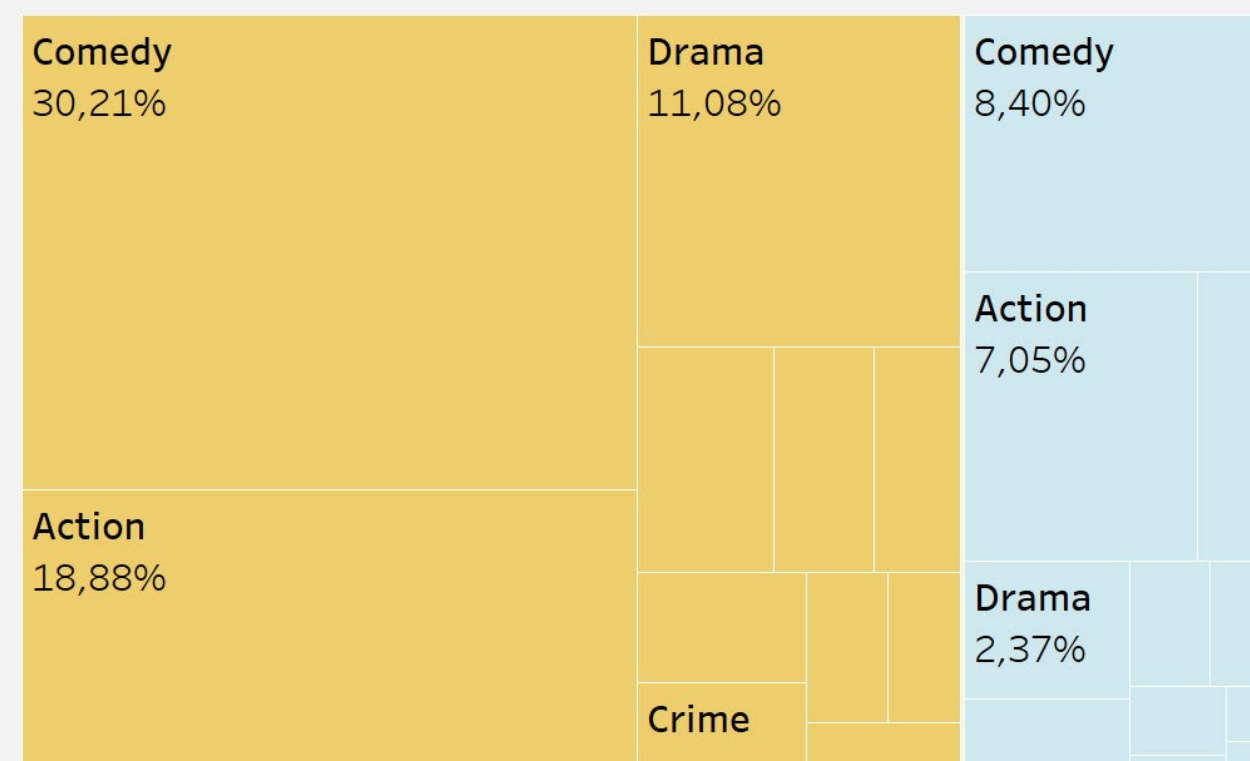
Italian drama is poorly represented, contributing only 6% to total Drama streams. Only "365 Days: This Day" (2022), is performing Above Average.

ITALY 100 MOVIES | SVOD PLATFORMS

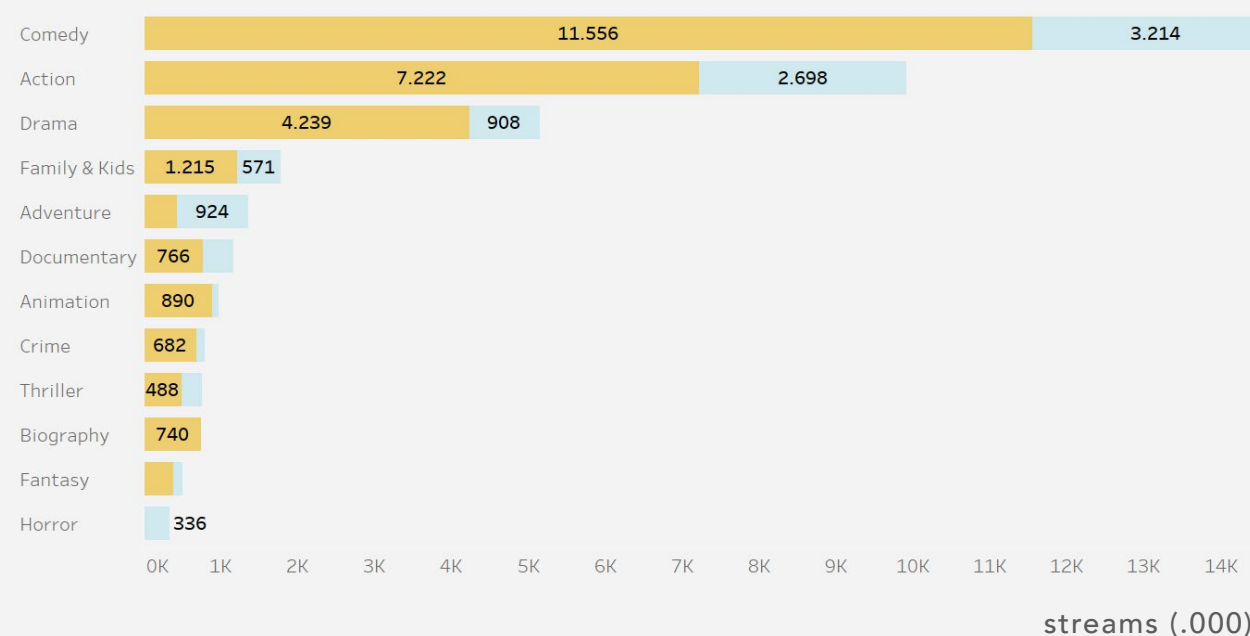
TOP MOVIES STREAMS BY GENRES



MOST WATCHED GENRES SHARE BY PLATFORM



TOTAL STREAMS BY GENRES PLATFORM COMPARATIVE



ACTION, WHICH SEEMED SET IN STONE AS THE MOST-WATCHED GENRE ON NETFLIX, WITHDREW TO SECOND POSITION, ITS ACCUMULATED VIEWS DROPPING DRASTICALLY IN FAVOUR OF COMEDY

Action content has been the preferred choice for Italian spectators since January, but in May it has yielded to Comedy thanks to the American high school film "Senior Year". Netflix cumulates 11.5M views in this genre, whereas action amassed 7.2M. Comedy and Action are also the most watched genres on Amazon this month, although with much humbler figures: 3.2M and 2.6M cumulated streams each. The release of the Comedy, "Mollo tutto e apro un chiringuito", has surpassed the release of "No Time to Die", one of Amazon's main courses for the month.

Drama cumulated 4.2M streams on Netflix, and nearly half of them are thanks to "365 Days: This Day", with 1.9M views. There is only one genre where Amazon is stronger than Netflix: Adventure and Horror.

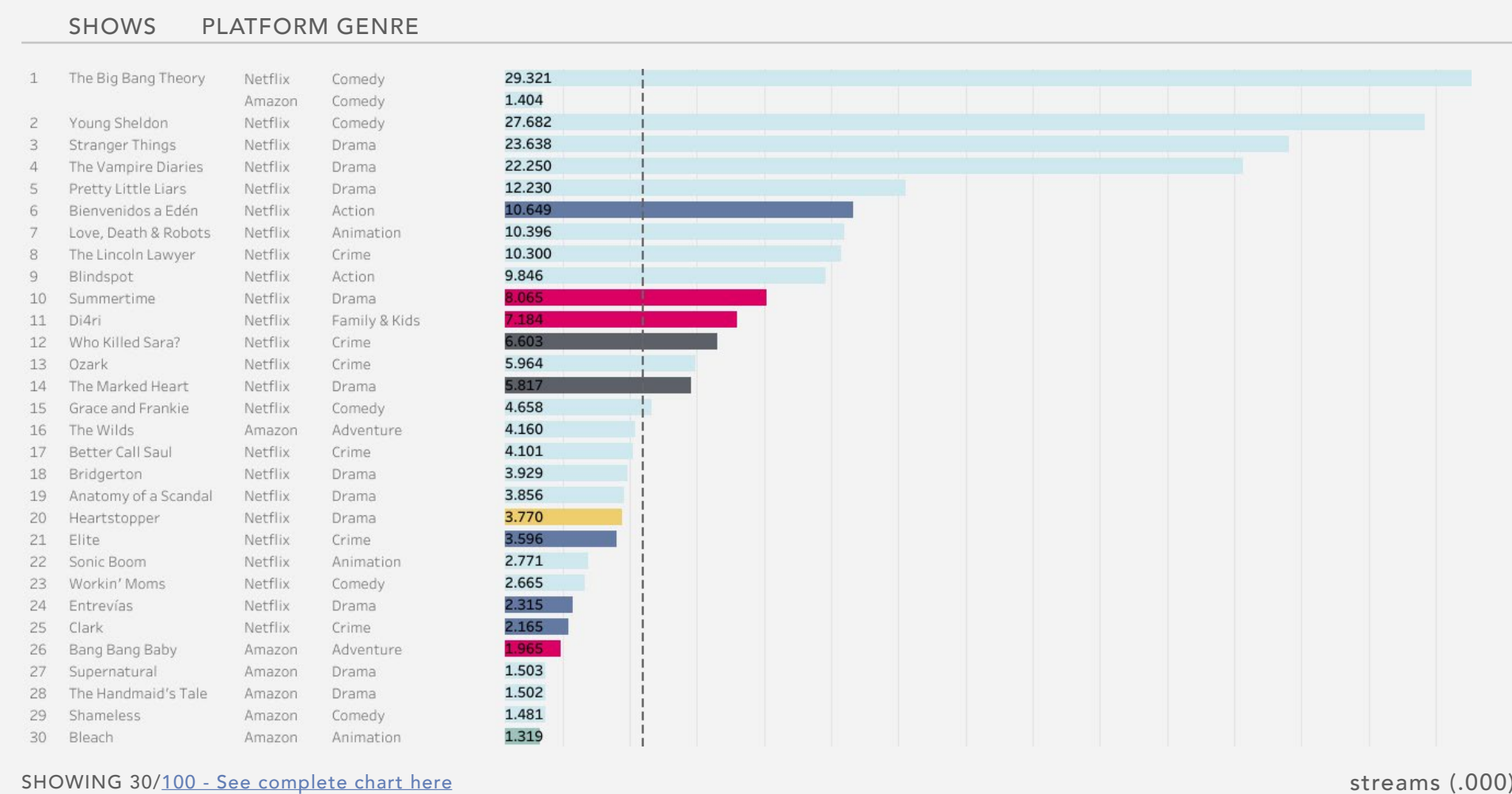
OTT

- Amazon
- Netflix

ITALY 100 SHOWS | OVERVIEW

TOTAL STREAMS BY SHOW

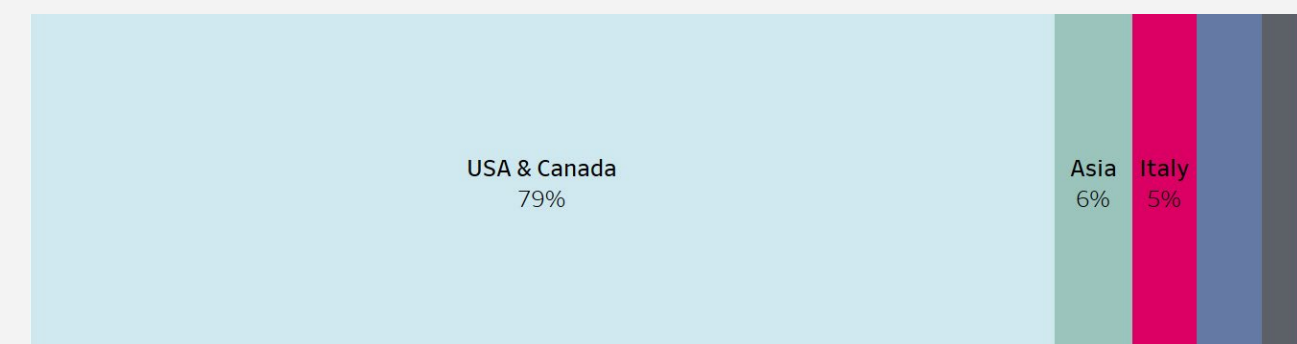
NETFLIX - AMAZON



SHOWING 30/100 - See complete chart here

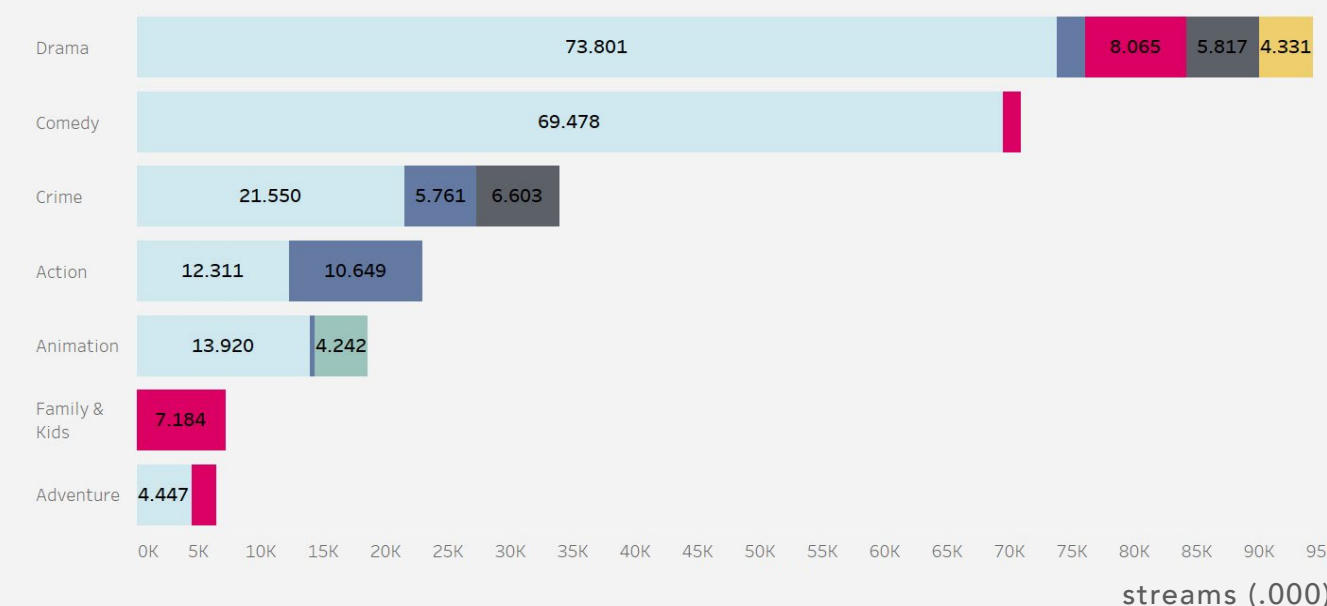
CATALOG SHARE BY COUNTRY

NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES

NETFLIX - AMAZON



PRODUCTION COUNTRIES



SHELDON COPPER'S COMPELLING UNIVERSE KEEPS DOMINATING THE CHARTS WITH SKY-HIGH FIGURES: "THE BIG BANG THEORY" CONQUERS ITALIAN CHARTS FOR THE FOURTH MONTH IN A ROW, AMASSING 29.3M VIEWS, FOLLOWED

closely by the spin-off of the very same universe: "Young Sheldon" with 27.6M. Together, they account for 56.9M streams. The beloved kids from Hawkins can't compete with the above mentioned sitcom, and the first instalment of the fourth season of "Stranger Things" settles for #3, with 23.6M views.

FRESHNESS DOESN'T SEEM TO BE A REQUISITE FOR ITALIAN SPECTATORS

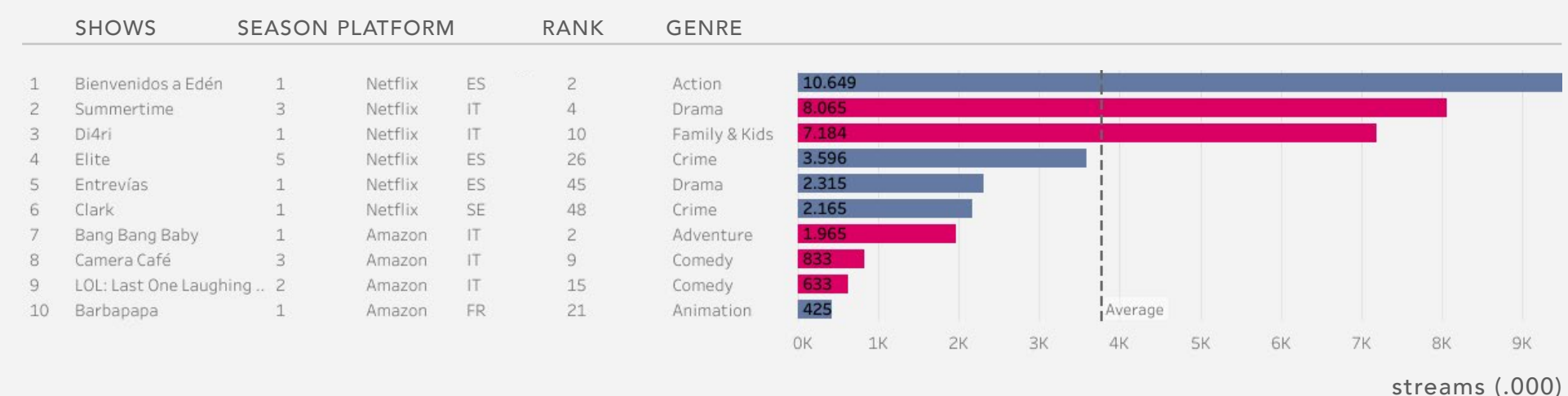
In April we observed that several non-active shows were delivering above average ratings and that trend is confirmed once again. In position #3 with 23.6 views we find "Vampire Diaries" (2009 - 2017) and in position #4 "Pretty Little Liars" (2010 - 2017), whose last season was originally released in 2017.

THE SHARE OF AMERICAN SHOWS KEEPS GROWING, UNSTOPPABLY SO, WITH ASTONISHING FIGURES

nearly 80% of content comes from the USA & Canada, a monopoly never seen before in Italy. The remaining 20% is spread more or less equally among the other territories of origin. The Spanish show "Bienvenidos a Edén" sneaked into the TOP6 with 10.6M views. Also, local content achieved the same mark in the TOP10: "Summertime" with 8M views.

ITALY 100 SHOWS | EUROPEAN FOCUS

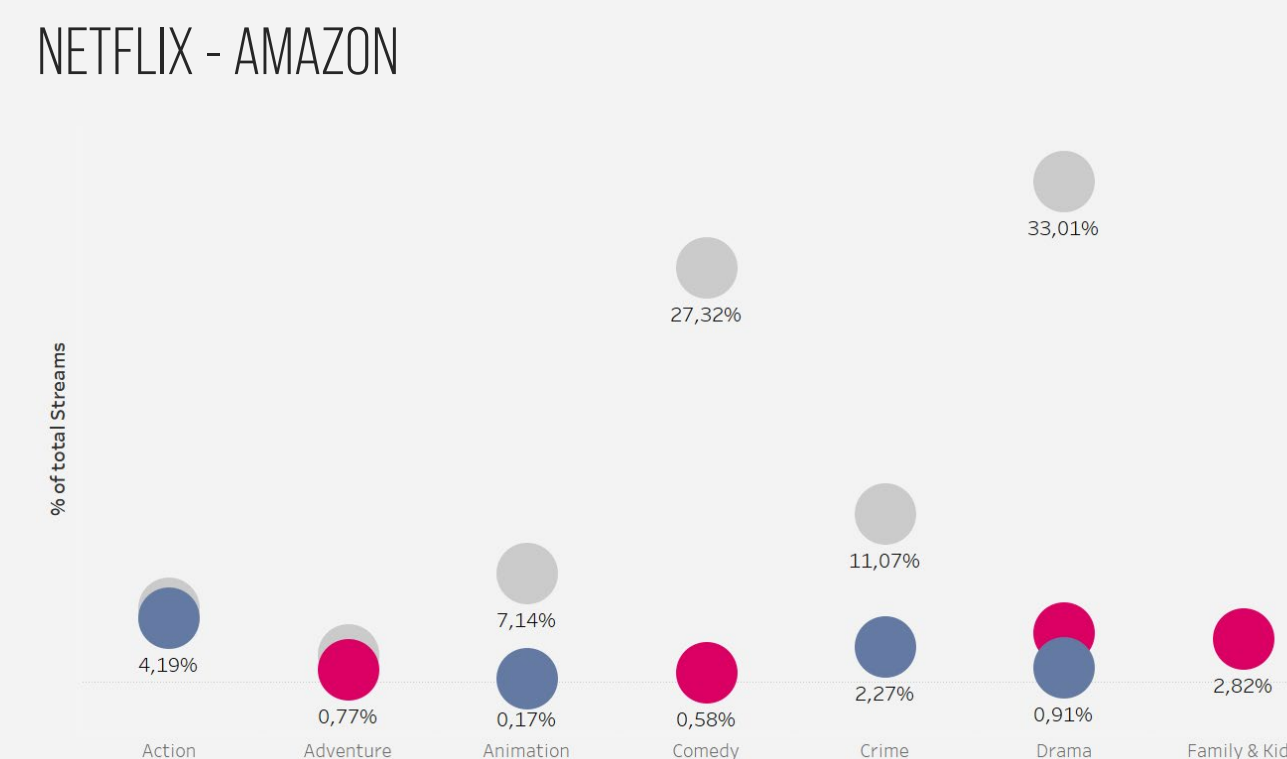
LOCAL AND EUROPEAN SHOWS IN THE TOP 100 NETFLIX - AMAZON



PRODUCTION COUNTRIES



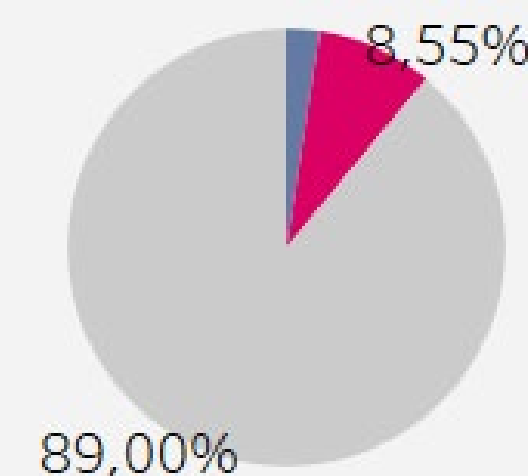
CONTRIBUTION OF LOCAL & EUROPEAN SHOWS TO TOTAL STREAMS NETFLIX - AMAZON



NUMBER OF TITLES BY GENRES NETFLIX - AMAZON

GENRE	EU	ITALY
Action	1	
Adventure		1
Animation	1	
Comedy		2
Crime	2	
Drama	1	1
Family & Kids		1

CONTRIBUTION TO DRAMA STREAMS



ITALIAN TITLES DID BETTER, COMPARED TO APRIL, WITH 5 TITLES OUT OF 10, TWO OF THEM SHOWING ABOVE AVERAGE PERFORMANCES

One is season 3 of “Summertime”, the romantic teen drama which is an adaptation of the bestseller by the Italian writer Federico Moccia, which collected 8M views. The other show is the high-school drama “Di4ri”, with 7.1 M streams.

There are three other Italian titles present in the chart with below average performances: two of them are non-factual comedies, “LOL: Last One Laughing Italy” and “Camera Cafe”.

“Bienvenidos a Edén”, “Élite” and “Entrevias”: Three Spanish TV products among the ten titles of the chart, one of them in the leading position. Italian audiences have given an opportunity to Netflix’s new teen bet and it seems they have binge-watched it, and it has become the highest grossing European title of the month.

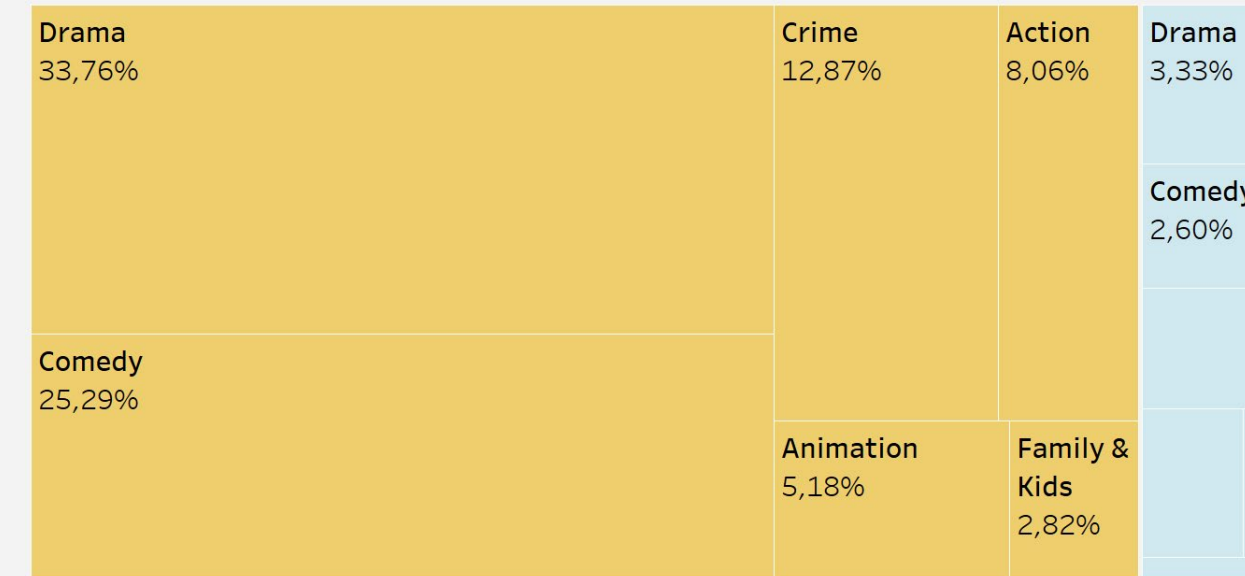
EUROPEAN DRAMA REAPPEARS IN THE PICTURE AFTER THREE MONTHS OF MONOPOLY FROM NON-EUROPEAN PRODUCTIONS, THANKS TO “SUMMERTIME” AND “ENTREVIAS”

ITALY 100 SHOWS | SVOD PLATFORMS

TOP SHOWS STREAMS BY GENRES



MOST WATCHED GENRES SHARE BY PLATFORM



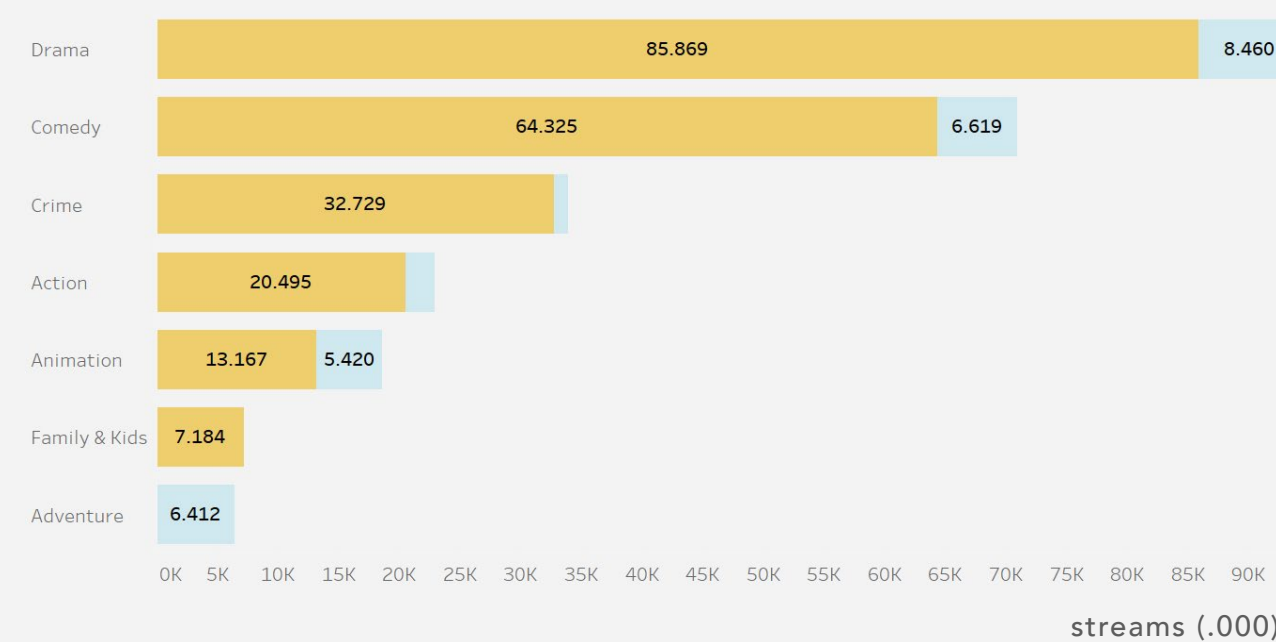
DRAMA, COMEDY AND CRIME REMAIN THE THREE MOST WATCHED GENRES, WITH NO SIGNIFICANT CHANGES COMPARED TO APRIL

Action breaks the routine, climbing one position and becoming the fourth most watched genre on Netflix, increasing its share from 2.2% in April to 8% in May. The Spanish show, "Bienvenidos a Edén", propels this change of positions.

ANIMATION IS THE FIFTH MOST POPULAR GENRE, ACCUMULATING 18.5M VIEWS

The release of the third season of "Love, Death and Robots" on Netflix on May 20 is mainly responsible for this. Two Japanese titles push this genre on Amazon: "Bleach", with 1.3M and "Hunter x Hunter" with 1.2M.

TOTAL STREAMS BY GENRES PLATFORM COMPARATIVE



OTT

- Amazon
- Netflix

HOT CONTENT IN ITALY

MOLLO TUTTO E APRO UN CHIRINGUITO

What was originally planned as the classic “cinepanettone” (an Italian neologism indicating some comedy films of Italian production that are usually released in cinemas during the Christmas period) has become Amazon’s best hit in May. “Mollo tutto e apro un chiringuito” was originally released in theatres in December 7, collecting 728K€ at the box office, and reaching the TOP2, to be acquired later by the e-commerce platform for release in May, where it has amassed 872K streams ever since.

This satirical comedy film is a sort of spin-off of a fictional, social-media-born public figure: “Il Milanese Imbruttito”, a comic exaggeration of the ‘stereotypical Milanese’. In a collection of comedy sketches, the character embodies every possible Milanese stereotype: he talks about his job all the time (even during leisure, holidays, free time etc.), always complains with workers in restaurants, hotels, etc., always has an eye on his watch, ‘optimizing’ every single moment in his day to stay ‘productive’, and so on.

Let’s rewind to 2013 to see the origin of this peculiar project: “Il Milanese Imbruttito” was invented by three Italian friends that decided to publish their point of view on the different metropolitan realities of Milan. A clear, simple and precise idea: to use the most used social tool in those years (Facebook) to make fun of the habits, customs and language of Milanese citizens. They started from an effective graphic choice and a synthetic

tone of voice, and the Facebook page immediately generated interest thanks to an ironic self-recognition mechanism. Within a month, having reached 100,000 likes, the three founders decided to go ahead with the project by organizing an event during the Salone del Mobile.

What started as a “social media game” evolved to business opportunity: merchandising, branded content, a blog, and the opening of a physical location in 2016. And then, in 2019 the masterminds behind this fictional business man from Milan joint-ventured “Il Terzo Segreto di Satira” (a collective of Italian satirical video-makers) to take this character to the next level and bring him to the big screen with its their own cinematographic project.

“Mollo Tutto e apro un chiringuito” tells the story of this middle-aged businessman from Milan, who, when an important deal falls through, decides to escape the city’s hustle and buys a bar on a beach in Sardinia. The film plays with the so-called formula of the fish out of the water, which has been proved to be highly efficient when it comes to exploiting comical situations about cultural clashes.

The film is produced by QMI and Medusa Produzione, with stand-up comedian, theatre actor and Youtuber, Germano Lanzoni, a very popular Italian public figure with millions of followers and fans as the lead.

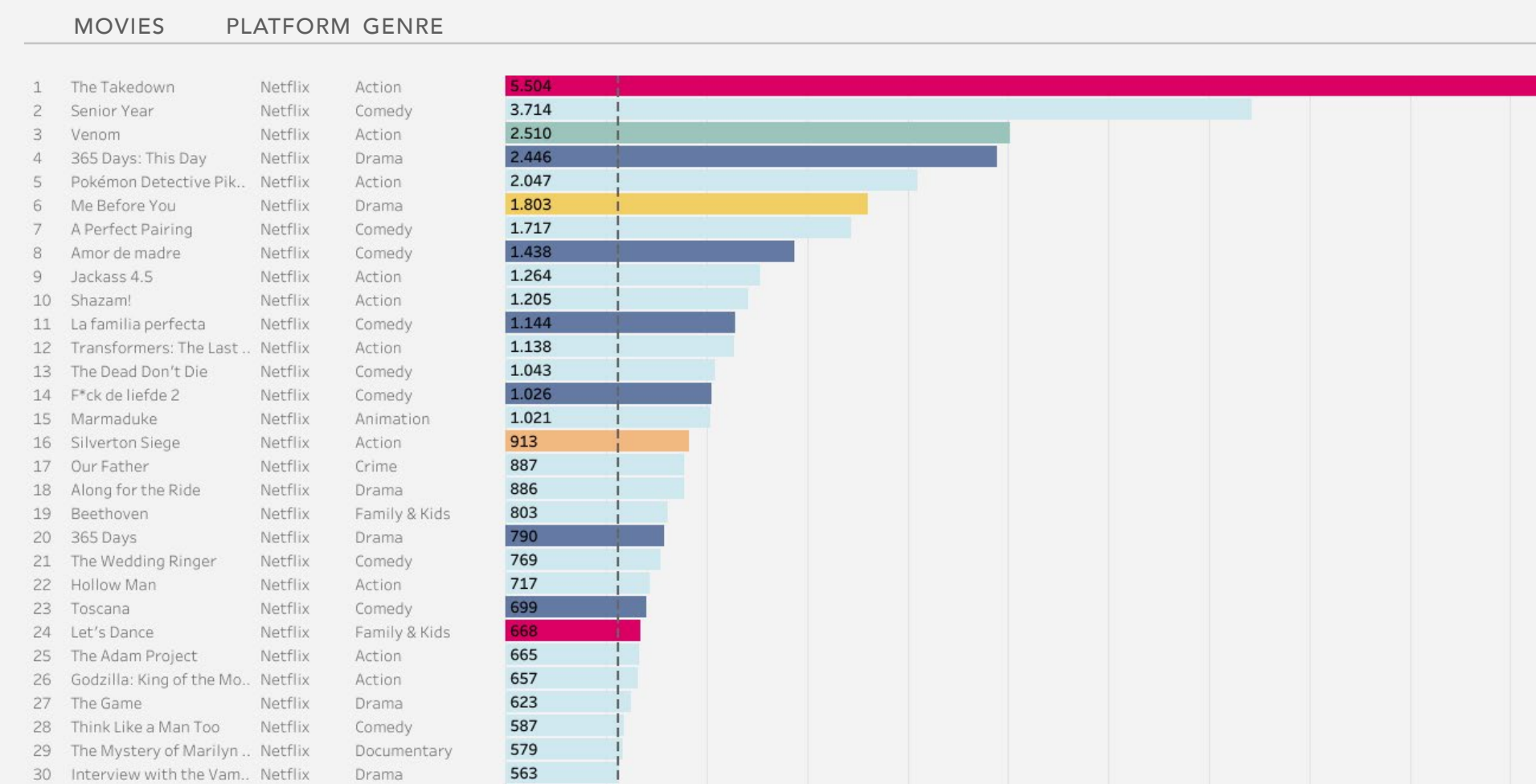
The Instagram profile of “Il Milanese Imbruttito” gathers 657K followers, the Facebook Page 1.9M and the Youtube channel over 500K subscribers.

Literature has always found inspiration in popular tales and folk characters. Given the urgent need of the studios for new ideas, and audiences’ apparently endless thirst for content, it was a matter of time before fiction started to tap into the social media culture: If an audience already loves a character, why not expand its universe beyond the ecosystem where it was born into different kinds of narratives?



FRANCE 100 MOVIES | OVERVIEW

TOTAL STREAMS BY MOVIE NETFLIX - AMAZON



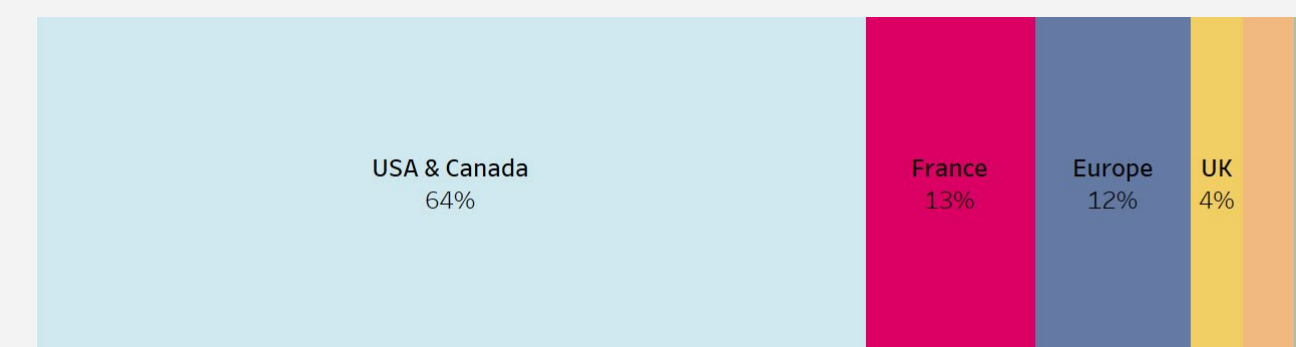
SHOWING 30/100 - [See complete chart here](#)

streams (.000)

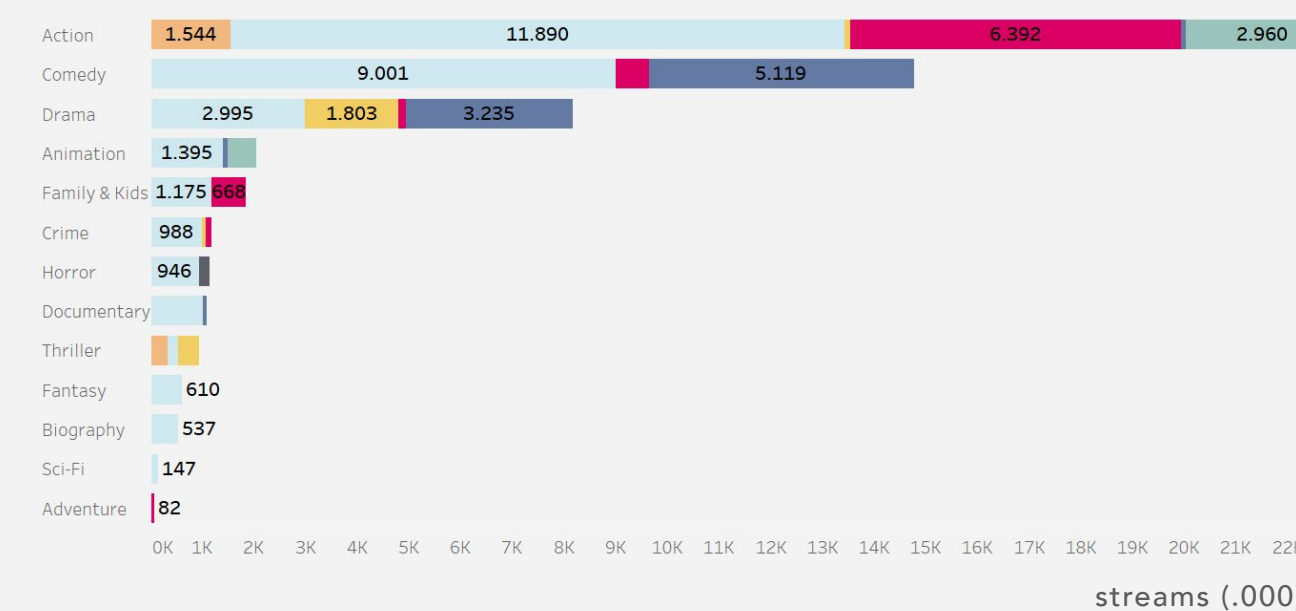
PRODUCTION COUNTRIES



CATALOG SHARE BY COUNTRY NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES NETFLIX - AMAZON



streams (.000)

“THE TAKEDOWN” CROWNS OMAR SY AGAIN

With 5.5M streams, “The Takedown” is the clear winning film of the grid. With almost double the streams than the usual number for France’s Tops, this Action-Comedy clearly convinced an important mass of subscribers in its home country.

ACTION MEETS COMEDY IS A GOLDEN CARD IN MAY IN FRANCE

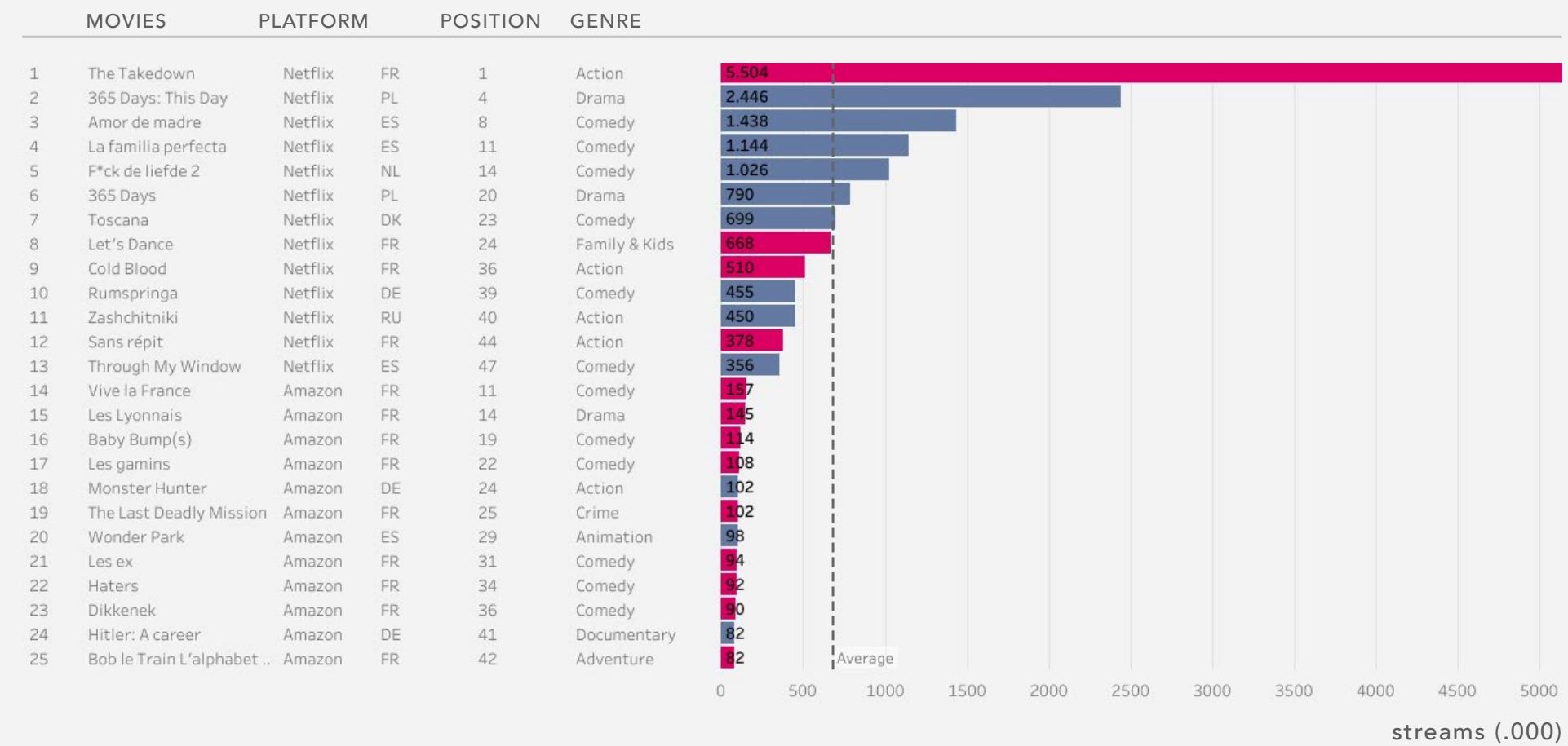
Other Action titles with prominent laughable tones take the lead this month: “Jackass 4.5” and “Shazam!”, at 9 and 10 respectively in the Tops, garnered 1.9M streams each. Zombie comedy “The Dead Don’t Die” by Jim Jarmush is at #13. It is not so common to see the big arty directors of Hollywood and Europe in the top positions on Netflix, but this film has found its fans this month, which has featured amusing proposals amongst the top positions in the grid. 16 titles in the top 20 are either Comedies or Action films.

FRENCH AUDIENCES WORSHIPPED FEMALE-LED FILMS IN SEVERAL GENRES AND SPECTRUMS

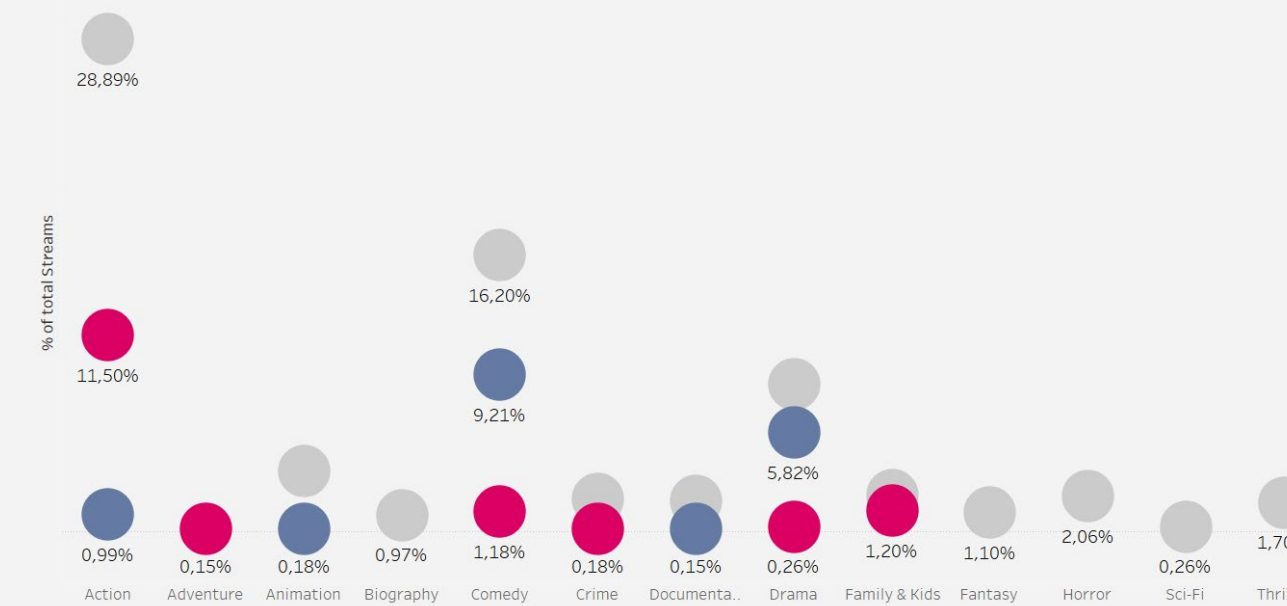
The very American Comedy “Senior Year”, about a 40-year-old woman waking up from a coma and willing to become a cheerleading captain again, reached number 2, with 3.7M streams. Rom-Coms conquered a solid place among Netflix’s subscribers in France: “Me Before You” (UK) and “A Perfect Pairing” (US) performed similarly, in positions 6 and 7 respectively, with an average of 1.7M streams.

FRANCE 100 MOVIES | EUROPEAN FOCUS

LOCAL AND EUROPEAN MOVIES IN THE TOP 100 NETFLIX - AMAZON



CONTRIBUTION OF LOCAL & EUROPEAN MOVIES TO TOTAL STREAMS NETFLIX - AMAZON



POLAND LEADS THE GRID AFTER FRENCH HIT "THE TAKEDOWN"

"365 Days: ThisDay", the new sequel to the controversial erotic Polish thriller, got 2.5M streams, in position 4 in the Tops. Lower down in the top 20, we also find the prequel "365 Days" with 780k streams. Both of them have had similar amounts of views and positions in April, showing that they could break through the usual 30-day explosive demand on Netflix.

SPAIN, THE NETHERLANDS AND DENMARK SHINE WITH TOP COMEDIES SHOT IN SUNNY LOCATIONS

Spanish Comedies "Amor de Madre" and "La Familia Perfecta" conquer positions 3 and 4 with 1.4M and 1.1M streams respectively. Anticipating the summer vibes, Dutch-produced party comedy shot in Ibiza, "Fuck the Liebe 2", is at number 5 and Danish-produced, shot in Italy, "Toscana", is at #7.

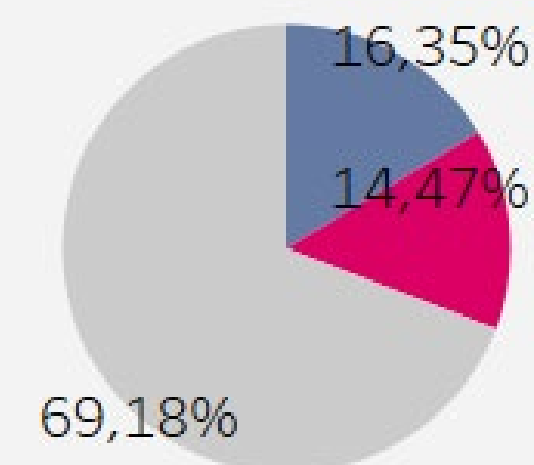
PRODUCTION COUNTRIES

- Europe
- France
- Others

NUMBER OF TITLES BY GENRES NETFLIX - AMAZON

GENRE	EU	FRANCE
Action	2	3
Adventure		1
Animation	1	
Comedy	6	6
Crime		1
Documentary	1	
Drama	2	1
Family & Kids		1

CONTRIBUTION TO DRAMA STREAMS

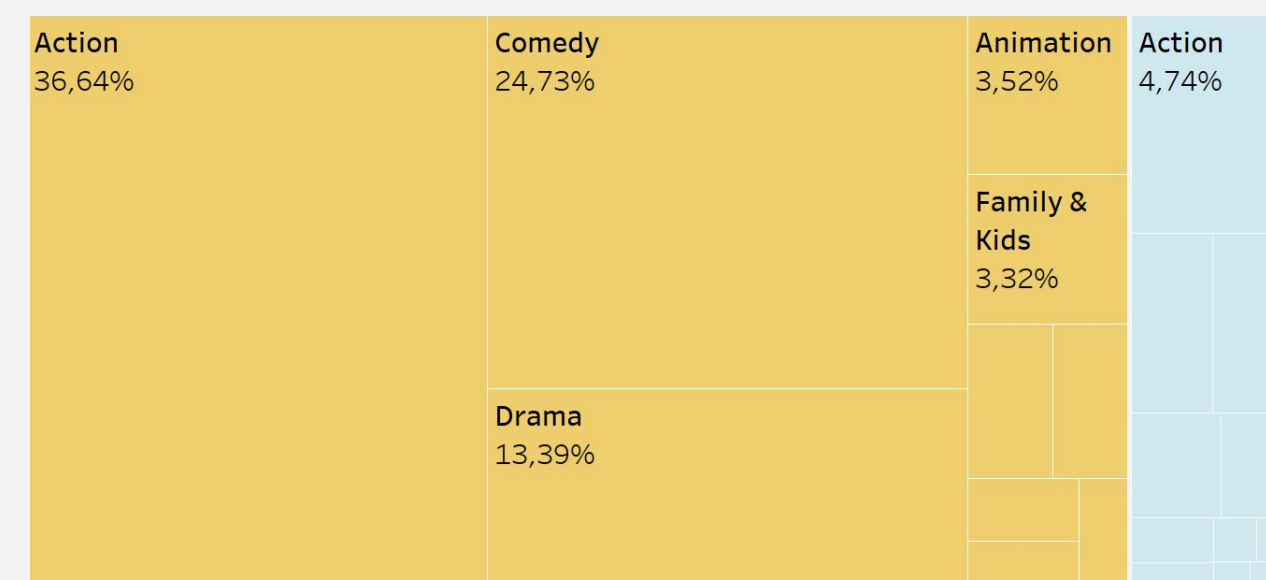


FRANCE 100 MOVIES | SVOD PLATFORMS

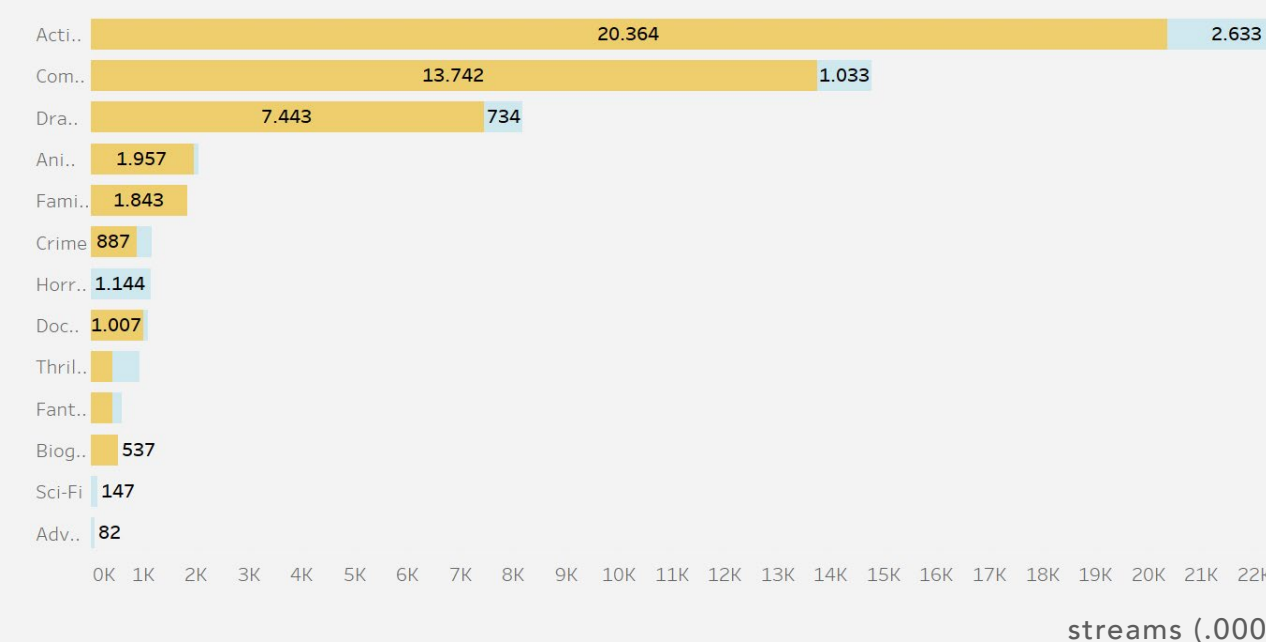
TOP MOVIES STREAMS BY GENRES



MOST WATCHED GENRES SHARE BY PLATFORM



TOTAL STREAMS BY GENRES PLATFORM COMPARATIVE



AMAZON: A MARGINAL PERFORMANCE IN MAY IN FRANCE

None of the Amazon films manages to perform above average. Still, Amazon contributes with 2.6M Action views, 10% of Netflix's figure for the same genre. The E-Commerce giant is somewhat significant in genres that continued to underperform this month: it is alone in the Horror category with 1.1M streams and beats Netflix in Thrillers with 528K streams, surpassing the latter's figure, of 416K streams.

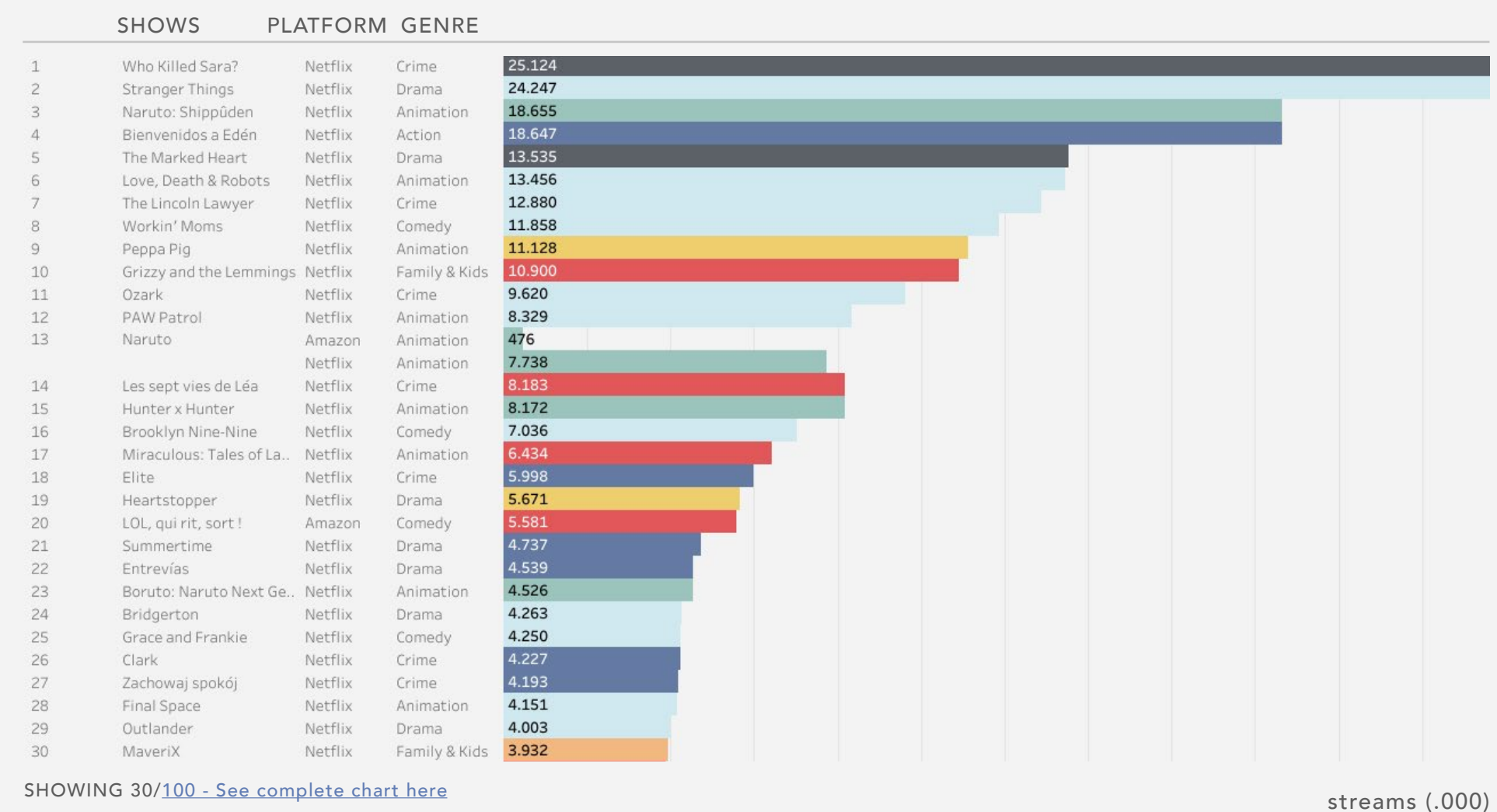
OTT

- Amazon
- Netflix

FRANCE 100 SHOWS | OVERVIEW

TOTAL STREAMS BY SHOW

NETFLIX - AMAZON



PRODUCTION COUNTRIES



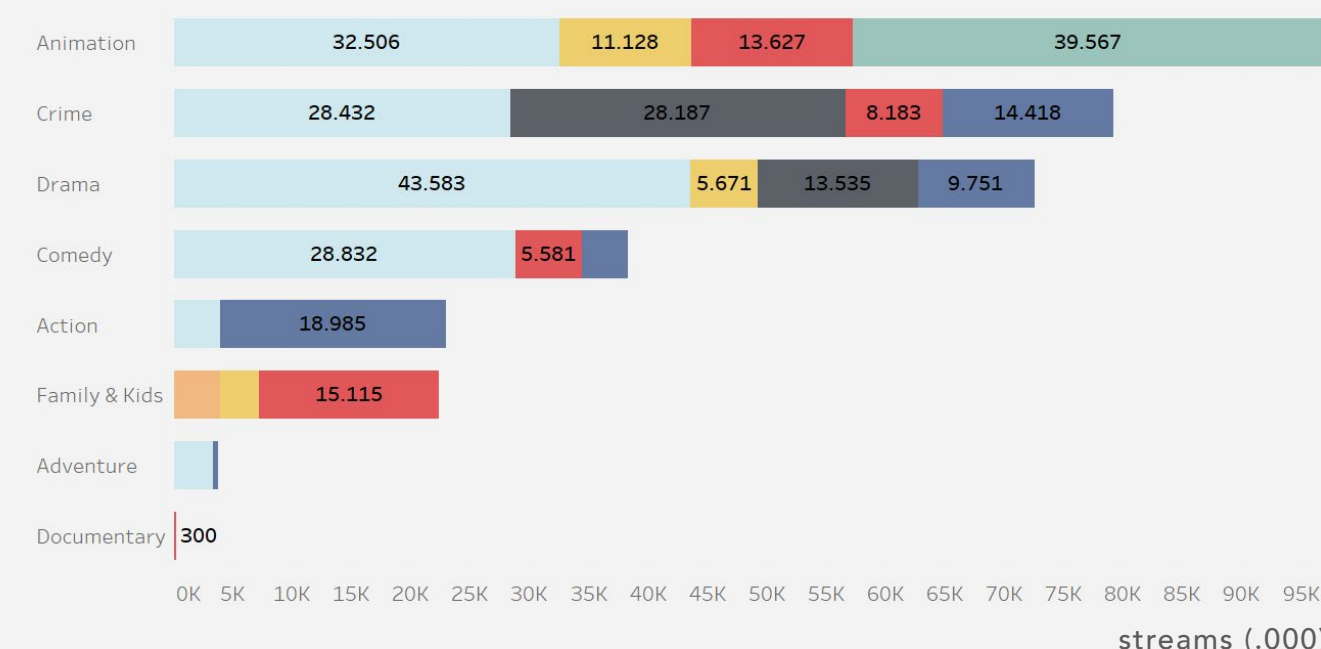
CATALOG SHARE BY COUNTRY

NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES

NETFLIX - AMAZON



“STRANGER THINGS” IS NOT THE WINNER AND NOT THE ONLY TOP-PERFORMING SHOW

This month, French households have been generously served by their series of favourite shows. The release of “Stranger Things” concentrated 25.1M streams in just four days after the show was launched on the 27th of May. But far from hoarding views, there have been several other successful series in the grid with a wide spectrum of genres and origins.

ANIMATION IS FRANCE’S MOST LOVABLE CREATURE

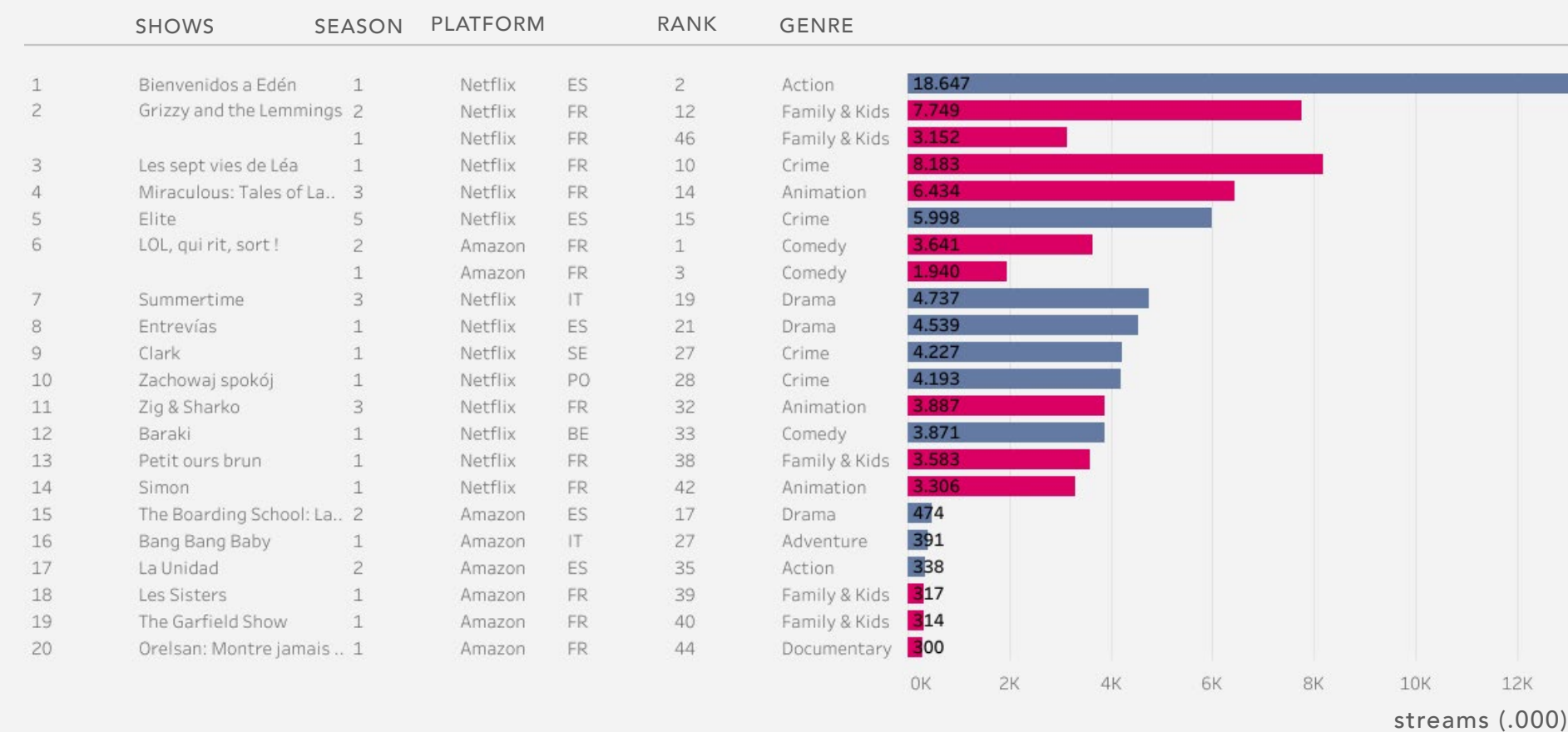
Led by “Naruto: Schippūden” (18.6M streams - top 3), Animation cumulates no less than 60.7M streams and is crowned as the preferred genre again this month. Diverse titles contribute to that: “Love, Death & Robots”, “Peppa Pig”, “Grizzy and the Lemmings”, “Paw Patrol”, “Naruto”, “Hunter x Hunter” and “Ladybug”, which are all in the top 20. French local production seems more focused on kids’ animation and leaves all the Animation adult pie to Asia and the US.

AMERICAN SERIES FIND THEIR AUDIENCE IN THIS COMPETITIVE MONTH

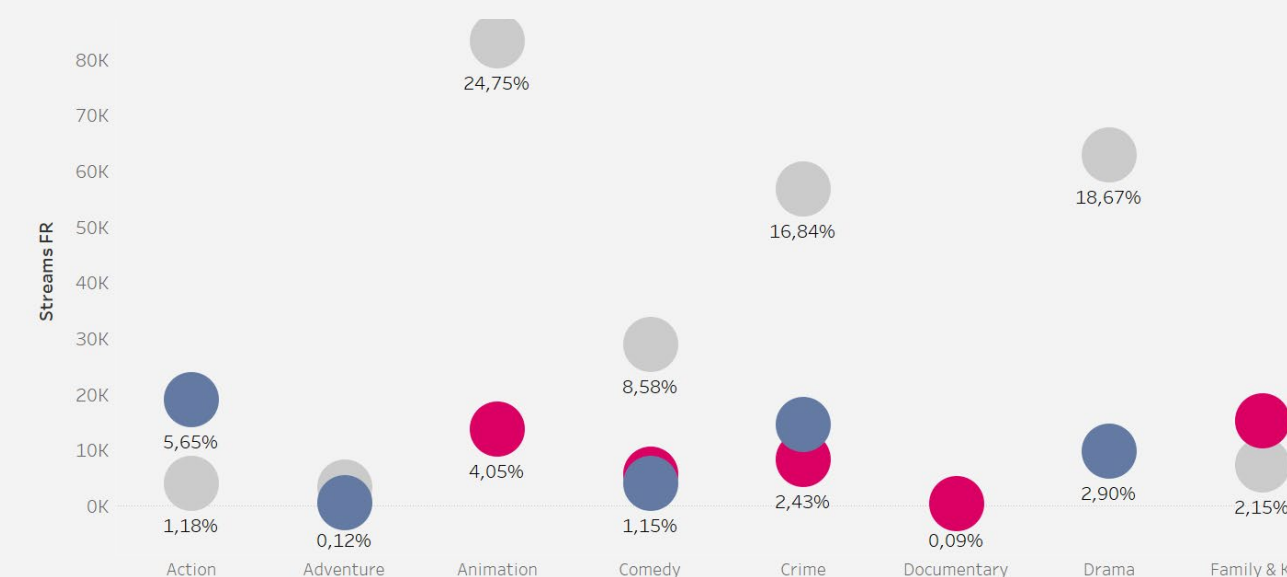
Despite the fierce competition, three more American series seized good positions: Crime - “The Lincoln Lawyer” holds position 7 and almost 13M streams. Toronto-produced comedy “Workin’ Moms” manages to hit position 8 with nearly 12M streams. Finally, the new season of the crime offering, “Ozark”, goes straight to number 11 among the Tops, with 9.6M streams. 62% of the views in the top 100 are for the US and Canada.

FRANCE 100 SHOWS | EUROPEAN FOCUS

LOCAL AND EUROPEAN SHOWS IN THE TOP 100 NETFLIX - AMAZON



CONTRIBUTION OF LOCAL & EUROPEAN SHOWS TO TOTAL STREAMS NETFLIX - AMAZON



FRANCE IS CRAZY ABOUT SPANISH- SPEAKING SHOWS

It seems like, finally, the 7 years of Spanish courses in French schools will bring better results thanks to Netflix. At number 1 among the Tops in France is season 3 of the Mexican series "Who Killed Sara?" with 25.1M streams. Released on the 19th of May, just 1 week before "Stranger Things", the Spanish Thriller series beats the Netflix Original flagship show by 1M streams. The Spanish Action series "Bienvenidos a Edén" holds position 4 with 18.6M streams and Colombian Drama "The Marked Heart" is in position 5 with 13.5M streams. "Elite" still holds a great position at number 15 with 6M streams and "Entrevías" is at number 21 with 4.5M streams. The synergy between Spanish-speaking shows is palpable in France.

"LES SEPT VIES DE LÉA" IS THE ONLY FRENCH REAL IMAGE FICTION IN HIGH POSITIONS

This Crime-Fantasy-Drama taps into all the preferred angles of Young Adults audiences, and gathers 8.1M streams this first season in the overall top 10 and top 5 in Europe. A not insignificant figure given that it does share traits and Audience with existing flagship IP "Stranger Things". Check out our Hot Titles section for more information about this series.

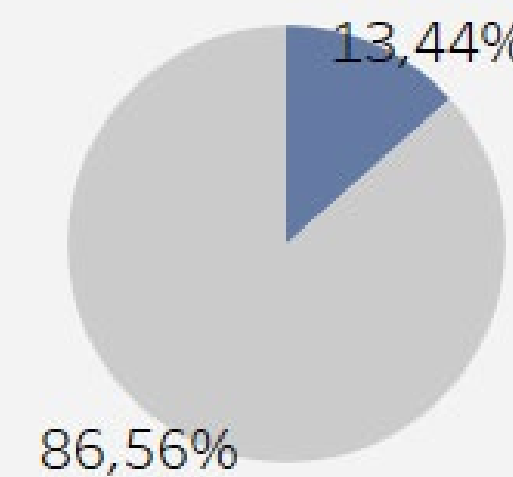
SWEDEN AND POLAND STAND OUT IN THE EUROPEAN GRID

Swedish Action-Comedy "Clark" achieves 4.2M streams and is at number 9 amongst the European shows. A similar figure is achieved by Polish crime-mystery show "Hold Tight - Zachowaj spokój".

NUMBER OF TITLES BY GENRES NETFLIX - AMAZON

GENRE	EU	FRANCE
Family & Kids		4
Crime	3	1
Drama	3	
Animation		3
Comedy	1	1
Action	2	
Documentary		1
Adventure	1	

CONTRIBUTION TO DRAMA STREAMS

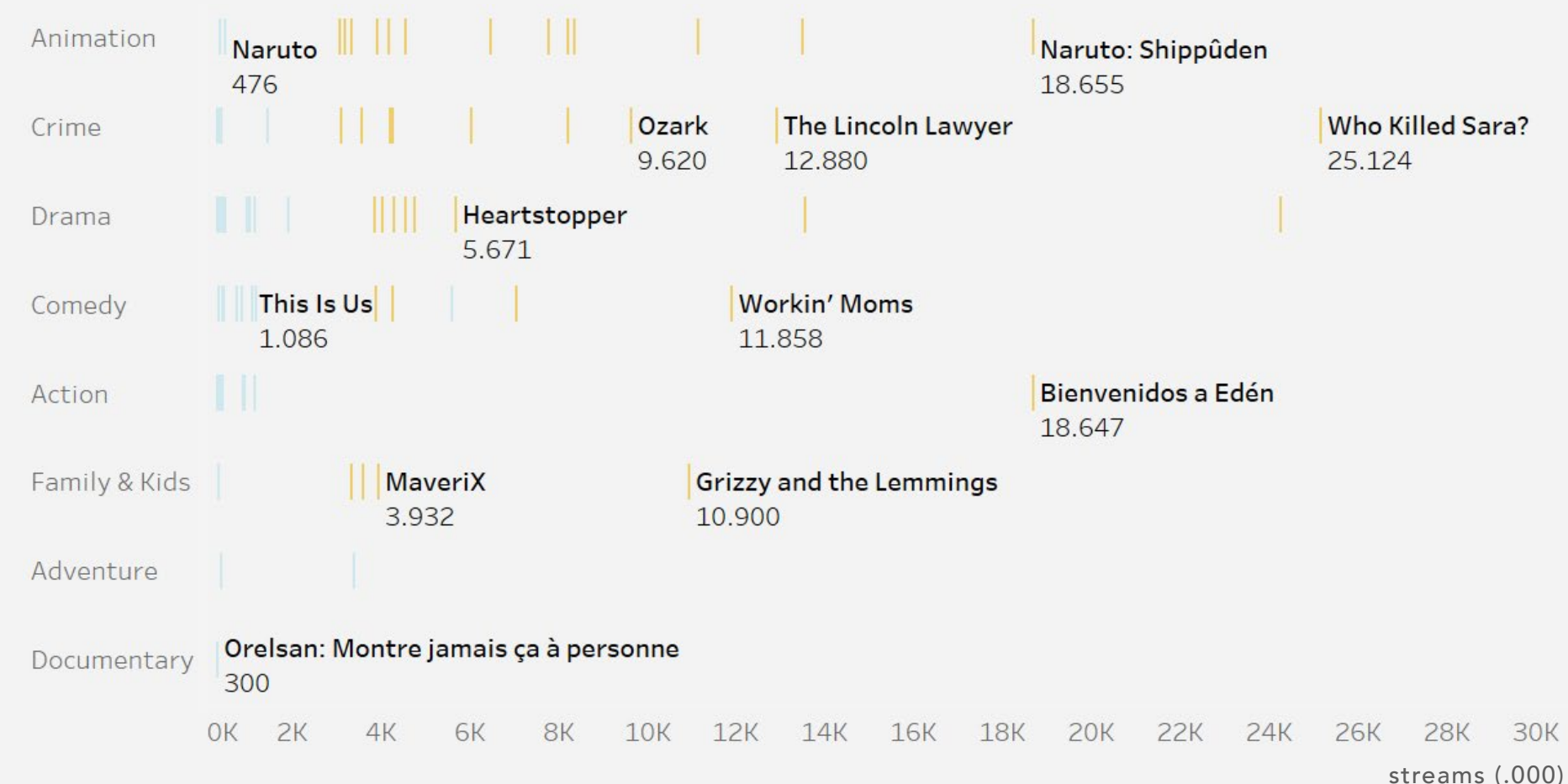


PRODUCTION COUNTRIES

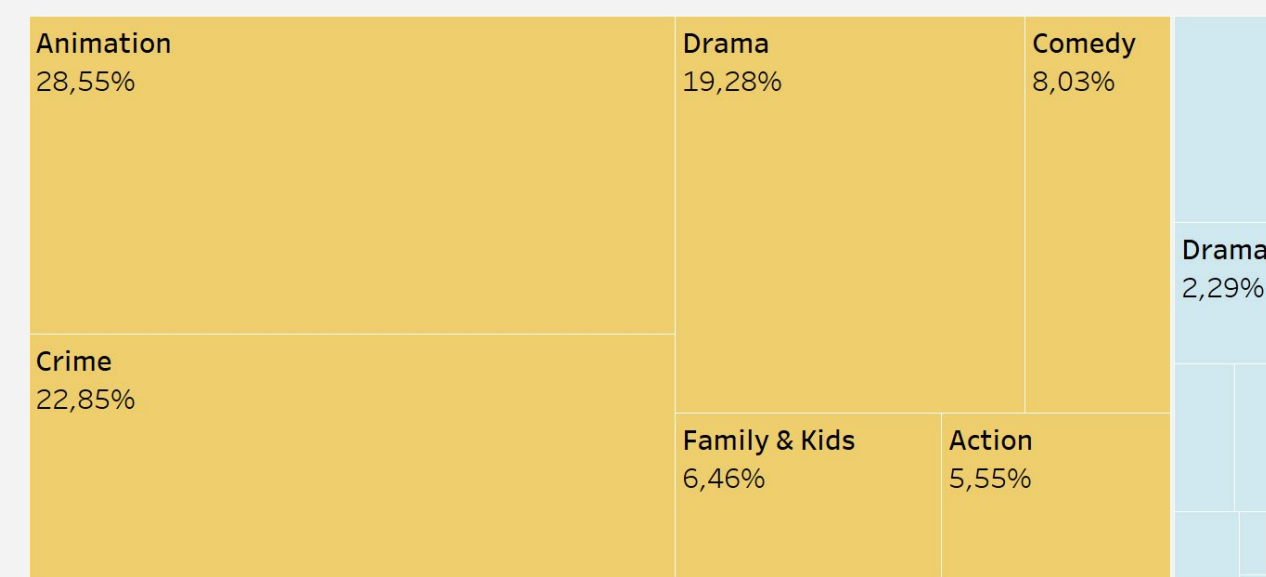
- Europe
- France
- Others

FRANCE 100 SHOWS | SVOD PLATFORMS

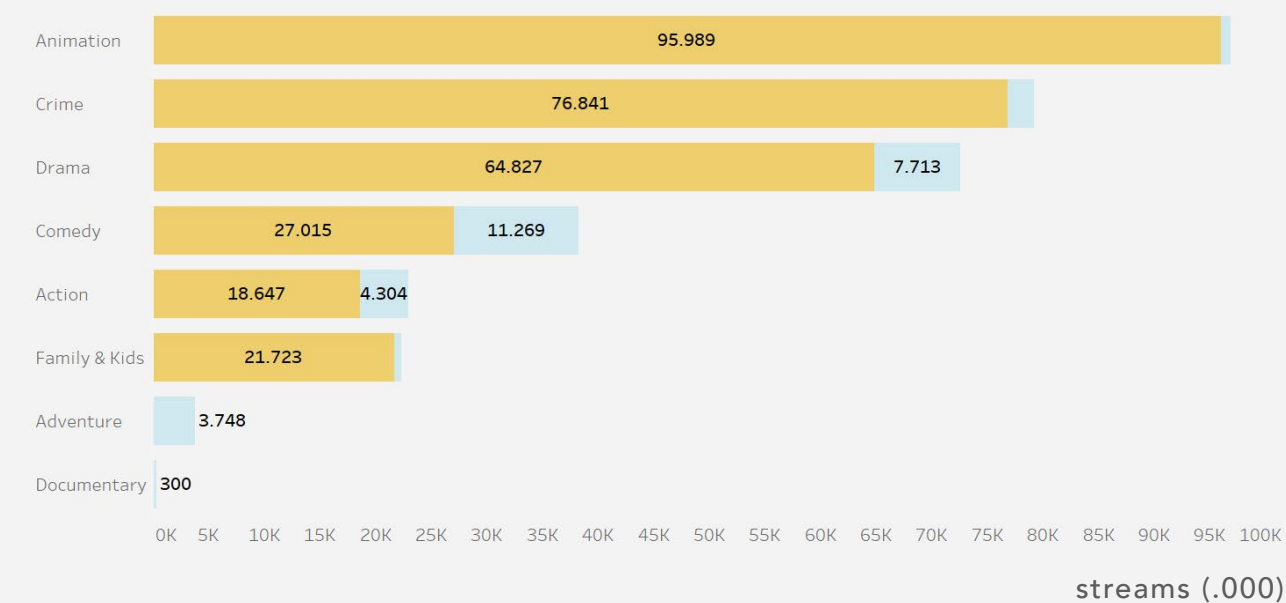
TOP SHOWS STREAMS BY GENRES



MOST WATCHED GENRES SHARE BY PLATFORM



TOTAL STREAMS BY GENRES PLATFORM COMPARATIVE



AMAZON PERFORMS POORLY WITH ONLY ONE SHOW IN THE STREAMING RACE

“LOL Ce qui Rit, Sort” is the top performing Amazon reality show obtaining excellent results in several European markets. In France in May it obtained 5.6M streams and is continuing to perform steadily, as it has done for the last few months. Thanks to this show, Amazon’s leading genre is Comedy with 11.3M total streams. This is almost one third of what Netflix achieves in the same genre.

OTT

- Amazon
- Netflix

HOT CONTENT IN FRANCE

“LES 7 VIES DE LÉA”

“Les 7 Vies de Léa” is a newly launched mystery-thriller series with a dose of fantasy. It involves a body-swap and time-travel plot. The show is produced by the French film, series and branded content company, Empreinte Digitale. The same company is behind series such as “Parallèles” at Disney+, “Marianne” at Netflix, “Moah” and “Missions” at Orange’s OCS, and “Infiniti” at Canal+. Empreinte Digitale has premiered theatrically “Let’s Dance” with Pathé in 2019 grossing 2.5M USD at the French box office and has now landed on Netflix with almost 700k streams.

The series stars Raïka Hazanavicius who is also in the most recent film by her uncle Michel Hazanavicius, “Final Cut”, which opened at Cannes in May. Raïka is accompanied by a very diverse and young cast to keep under the radar including Khalil Gharbia, Marguerite Thiam Donnadiou, Maïra Schmitt, and Théo Fernandez.

Like several Young Adult shows, “Les 7 Vies de Léa” is based on a book of the same name: “The Seven Lives of Léo Belami” by Nataël Trapp. The show is written by Charlotte Sanson whose credits include Netflix’s “Comment Je Suis Devenu Super-Héros” and “Hippocrate”.

The series achieves 8M streams in position 14 in France. It is not a bad figure given the furious competition

it faced from all sides: on the one hand the long-awaited “Stranger Things” holds several entry points in common; on the other, with another French heavy-weight film, Omar Sy’s “The Touchdown”; and finally with crime shows like “Who Killed Sara?”, which managed to climb to number 1 in France’s Tops.

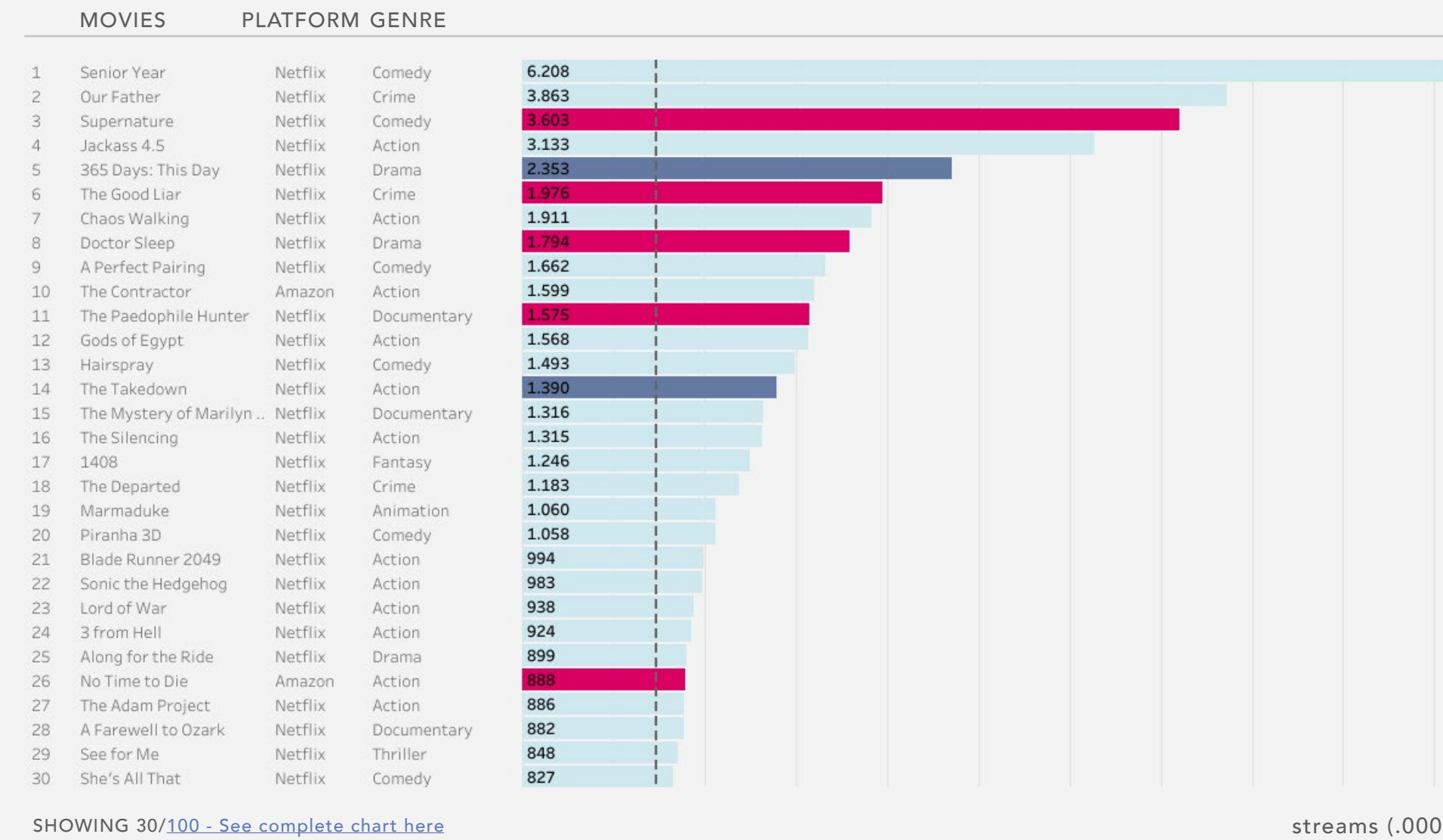
The excess of competition might have made it impossible for “Les 7 Vies de Léa” to break through the noise in other territories. However, it is in #27 with 3.8M streams in Spain and very similarly placed in Germany, in #28 with 3.8M streams. It has no presence in Italy or the UK.

The marketing elements observed in the campaign are sharply oriented towards the teen-young adult drama comedy and not so much towards the Fantasy or Sci-Fi side. Its vibrant yellow suggests a comedy, while the fuchsia palette and the shifting and evanescent pop images evoke a feel-good 90’s vibe. The trailer, for its part, starts with an amusing and young adult tone, accompanied by high-paced 90’s music that poignantly reveals the time travel element. In the second half, the crime and mystery elements are more seriously introduced. Comparable marketing looks and feels are applied to similar audience Netflix contents such as: “Boo, Bitch” and “I Am Not OK With This”.



UK 100 MOVIES | OVERVIEW

TOTAL STREAMS BY MOVIE NETFLIX - AMAZON



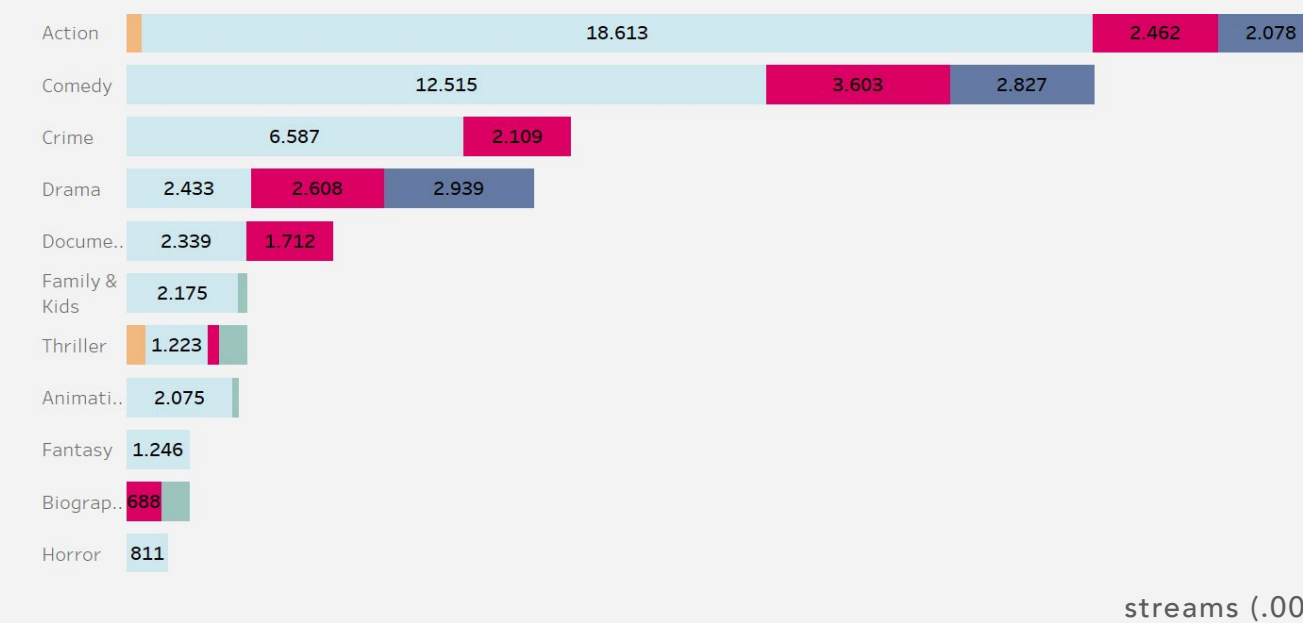
PRODUCTION COUNTRIES



CATALOG SHARE BY COUNTRY NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES NETFLIX - AMAZON



THREE DOCUMENTARIES PERFORM IN TOP POSITIONS THIS MONTH IN THE UK

Classified as crime, "Our Father", a crime documentary about an unstable doctor that decided to inseminate thousands of women without their approval, is #2 with 3.8M streams; UK-produced "The Paedophile Hunter" deals with similar themes and occupies position 11 with 1.6M streams. Thirdly, #15, "The Mystery of Marilyn", which got 1.5M streams.

HIGH-PROFILE DRAMAS AND CRIMES FIND THEIR AUDIENCES IN THE UK IN MAY

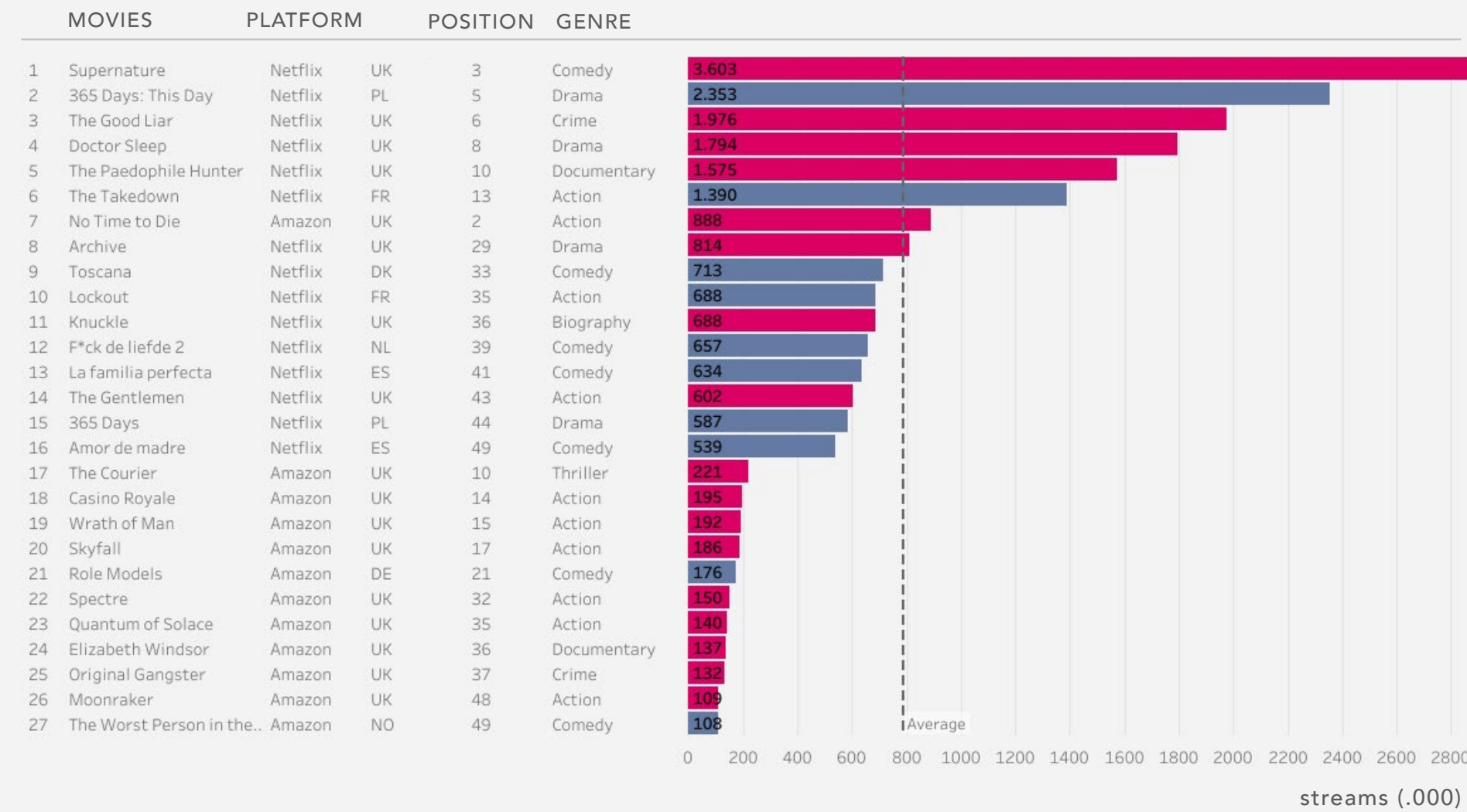
UK-produced "The Good Liar" and "Doctor Sleep" are rather "silver-audience-skewed" and were in 6th and 8th positions respectively with an average of 1.8M streams. Martin Scorecese's 2006 crime "The Departed" hits number 18 among the Tops with 1.3M streams. It's a rare film profile in the top positions of this market that is often Young-Adult-oriented.

RICKY GERVAIS' SUPERNATURE, A LOCAL STAND-UP COMEDY, MAKES IT TO THE TOP 3

With 3.6M streams in just one week after release, this format proves an interesting bet for Netflix's horizon. While the streamers introduce reality and TV formats, stand-up comedy seems to flow in that direction.

UK 100 MOVIES | EUROPEAN FOCUS

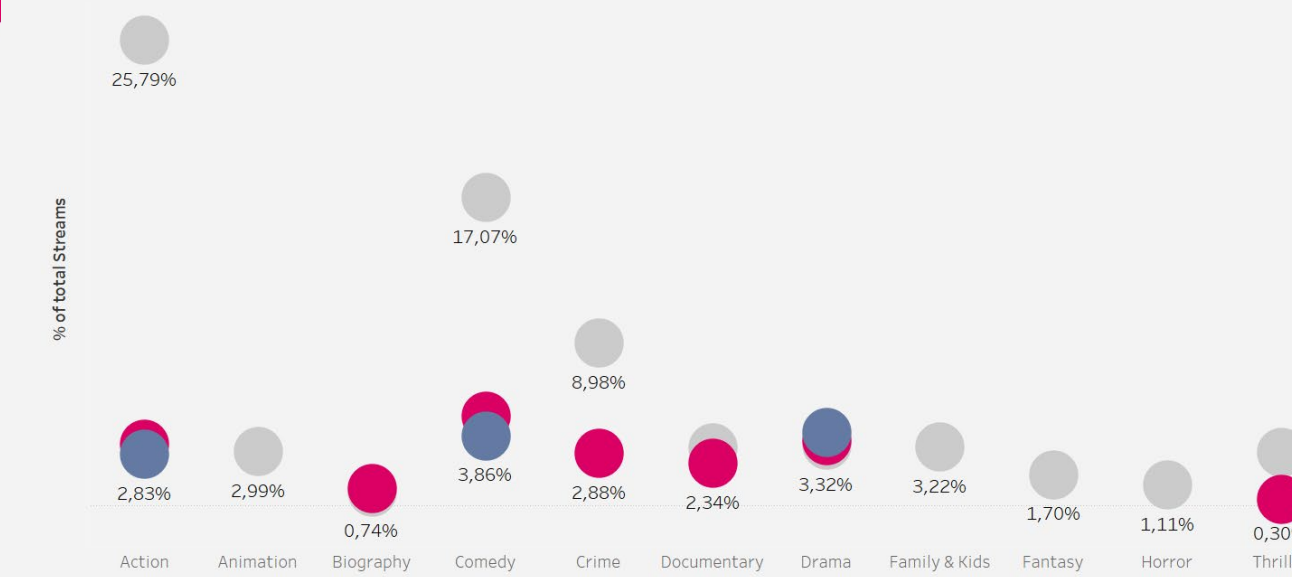
LOCAL AND EUROPEAN MOVIES IN THE TOP 100 NETFLIX - AMAZON



PRODUCTION COUNTRIES



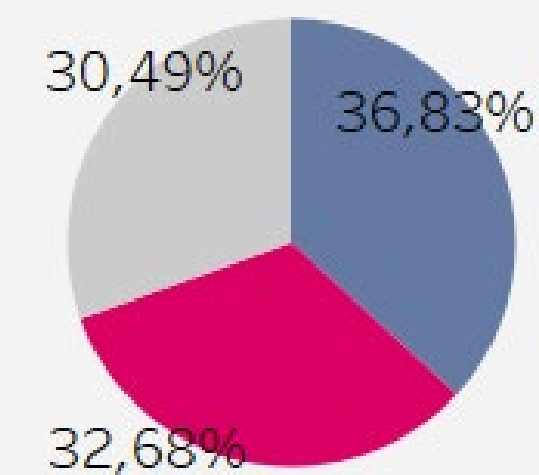
CONTRIBUTION OF LOCAL & EUROPEAN MOVIES TO TOTAL STREAMS NETFLIX - AMAZON



NUMBER OF TITLES BY GENRES NETFLIX - AMAZON

GENRE	EU	UK
Action	2	8
Biography		1
Comedy	6	1
Crime		2
Documentary		2
Drama	2	2
Thriller		1

CONTRIBUTION TO DRAMA STREAMS

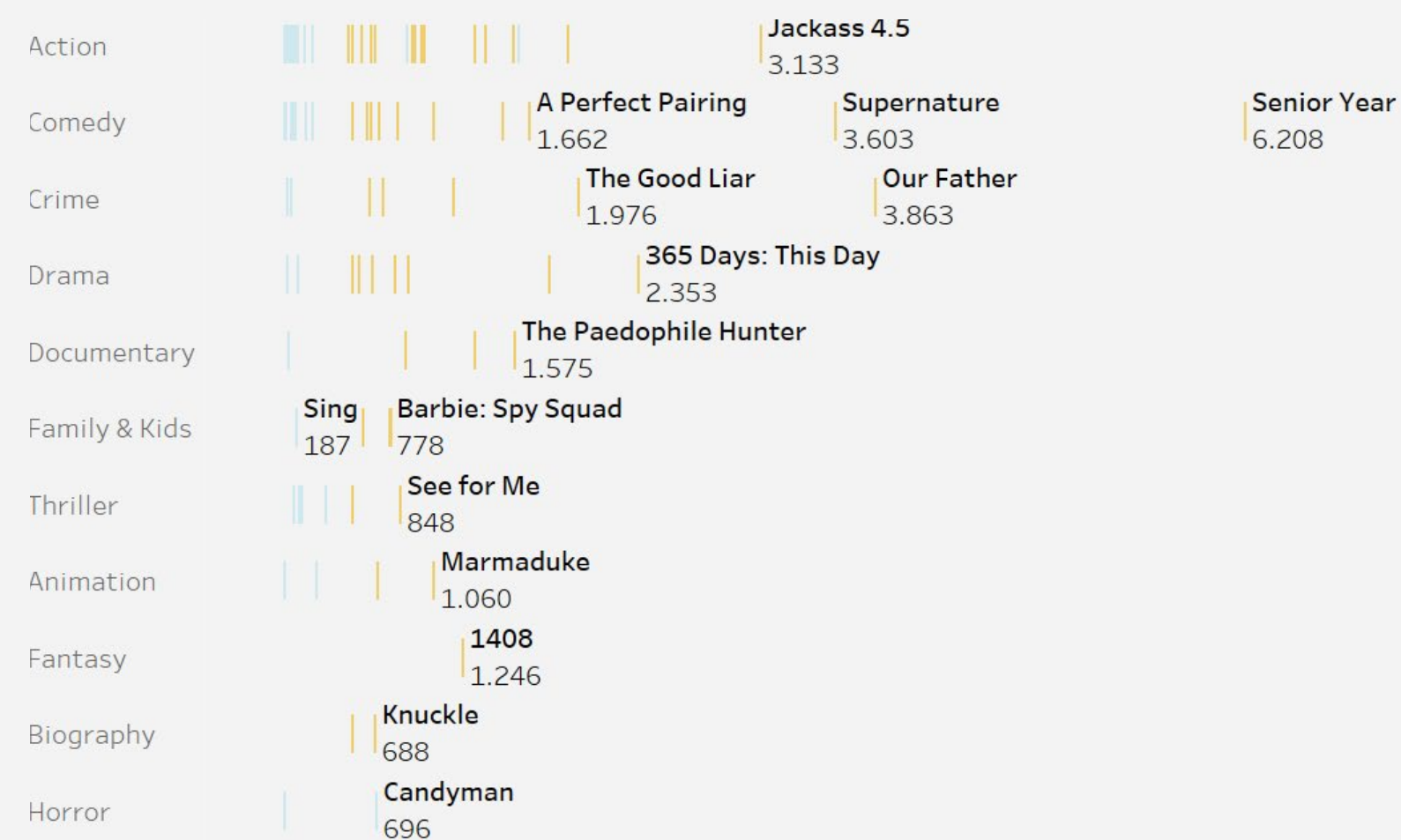


BABY STEPS IN THE GROWTH OF EUROPEAN FILMS IN THE UK

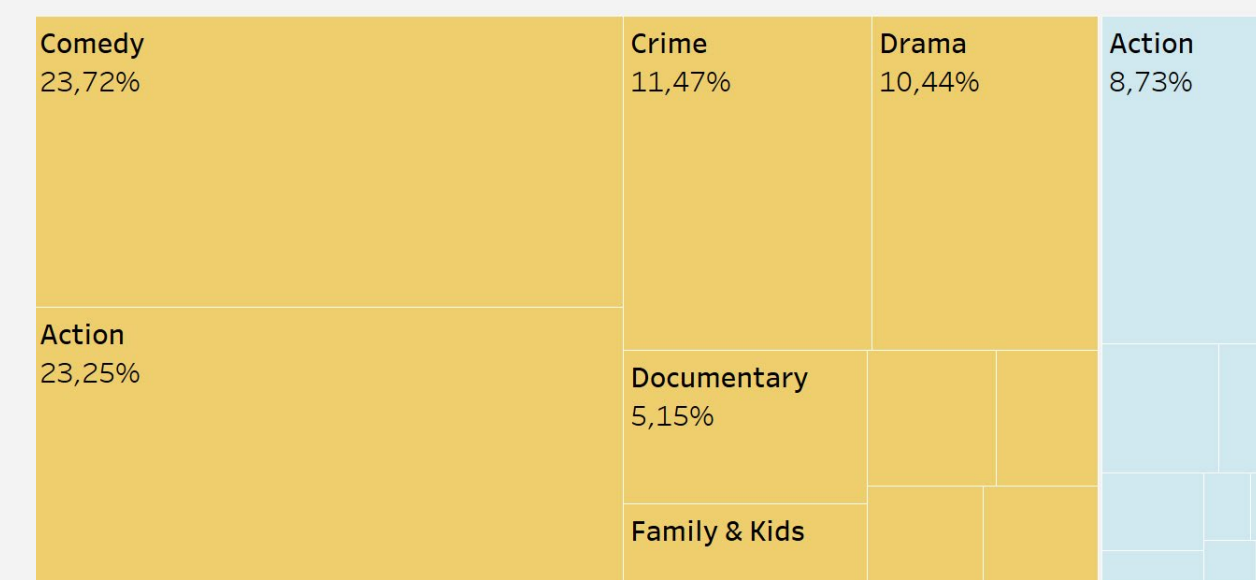
Although European Films that succeed in other markets don't manage to go beyond 600K streams this month, there are exceptions: Polish-produced hit "365 Days: This Day" achieves 2.3M streams and an unprecedented top 5 this year for a European film. The film achieved a lower mark in April but is consistently maintaining its word-of-mouth and algorithm-driven marketing, breaking through the supposedly standard 30-days Netflix life. French Omar Sy hit "The Takedown" manages to conquer UK audiences with 1.4M streams and reach number 14 among the Tops. Together, these films upgrade Europe to 10% of market share: that's 1 point more than in April, which subsequently grew 1% compared to March. It's also double what the European shows gathered this month.

UK 100 MOVIES | SVOD PLATFORMS

TOP MOVIES STREAMS BY GENRES



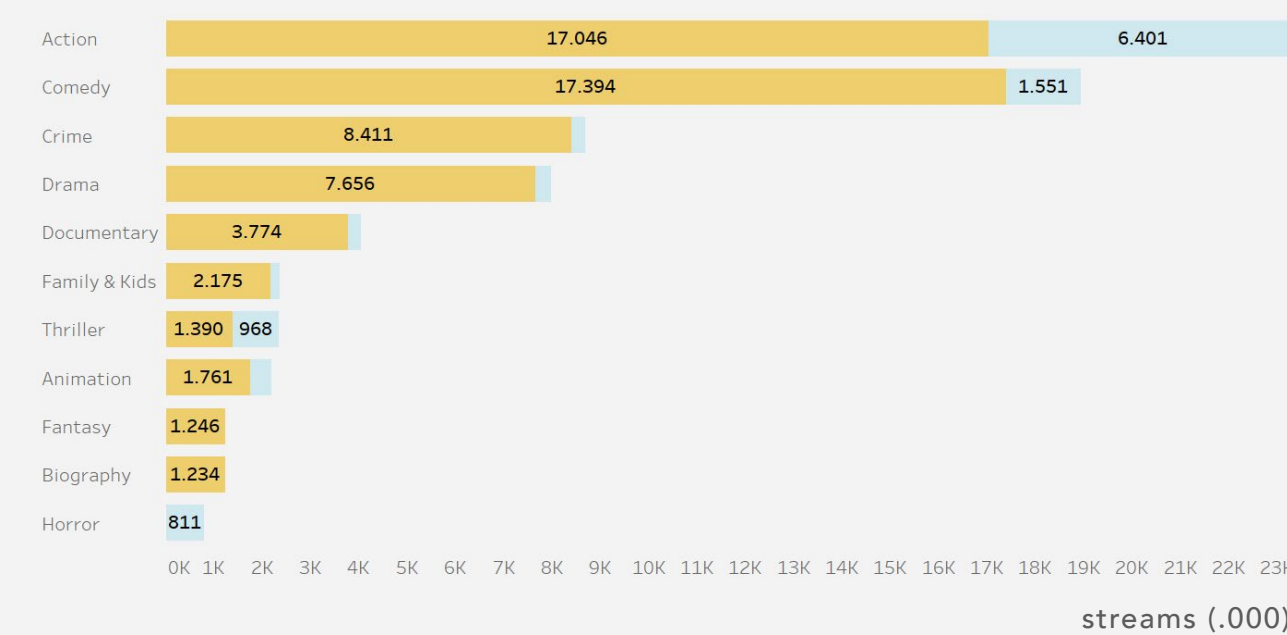
MOST WATCHED GENRES SHARE BY PLATFORM



AMAZON STILL HOLDS A SLIM MARKET IN THE UK IN MAY

Comparable to the French market, Amazon achieves a third of the Action streams obtained by Netflix in the same category (6.4M Amazon vs Netflix's 17M). Horror is the only established category in which Amazon, with 811K streams.

TOTAL STREAMS BY GENRES PLATFORM COMPARATIVE

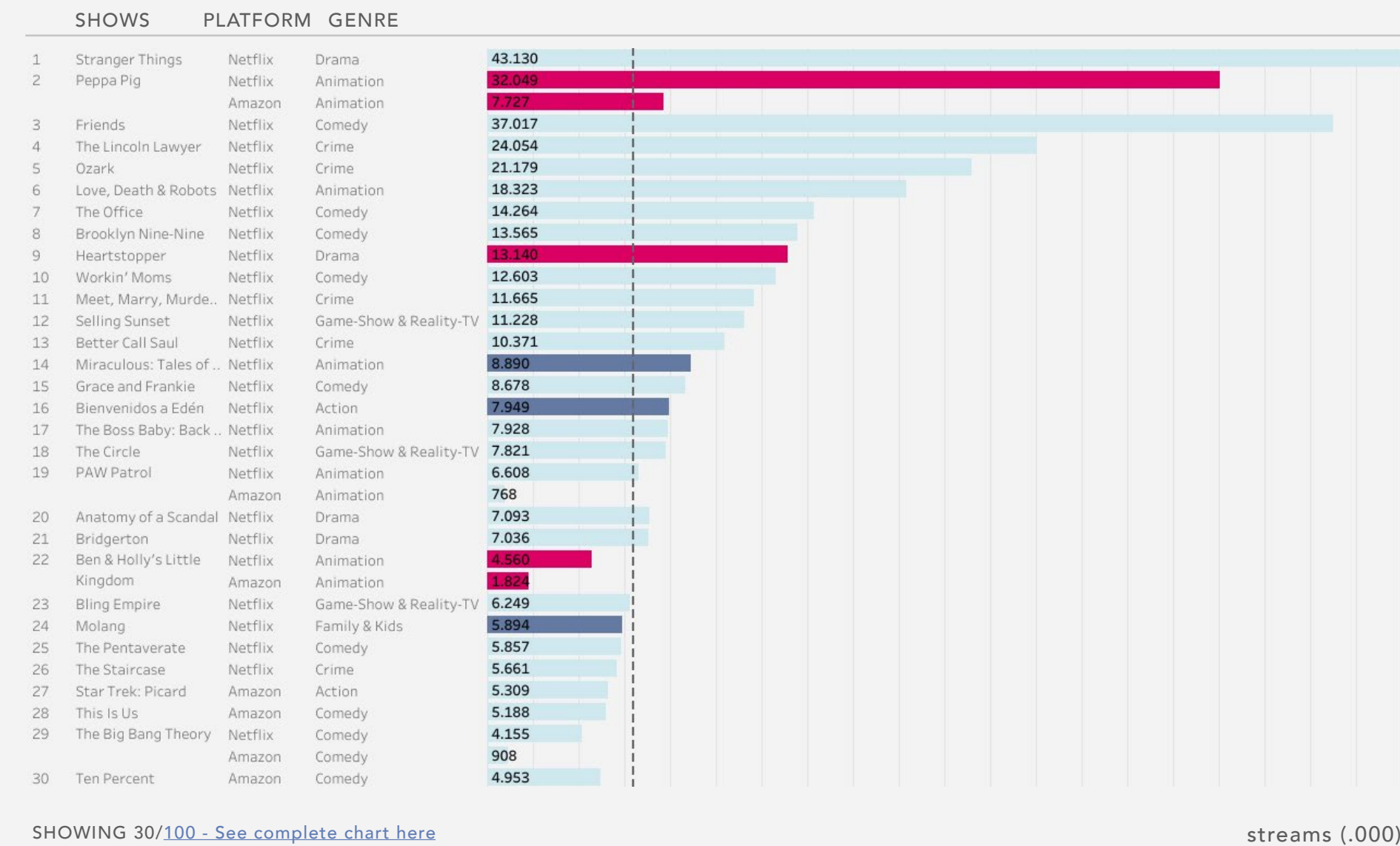


OTT

- Amazon
- Netflix

UK 100 SHOWS | OVERVIEW

TOTAL STREAMS BY SHOW NETFLIX - AMAZON



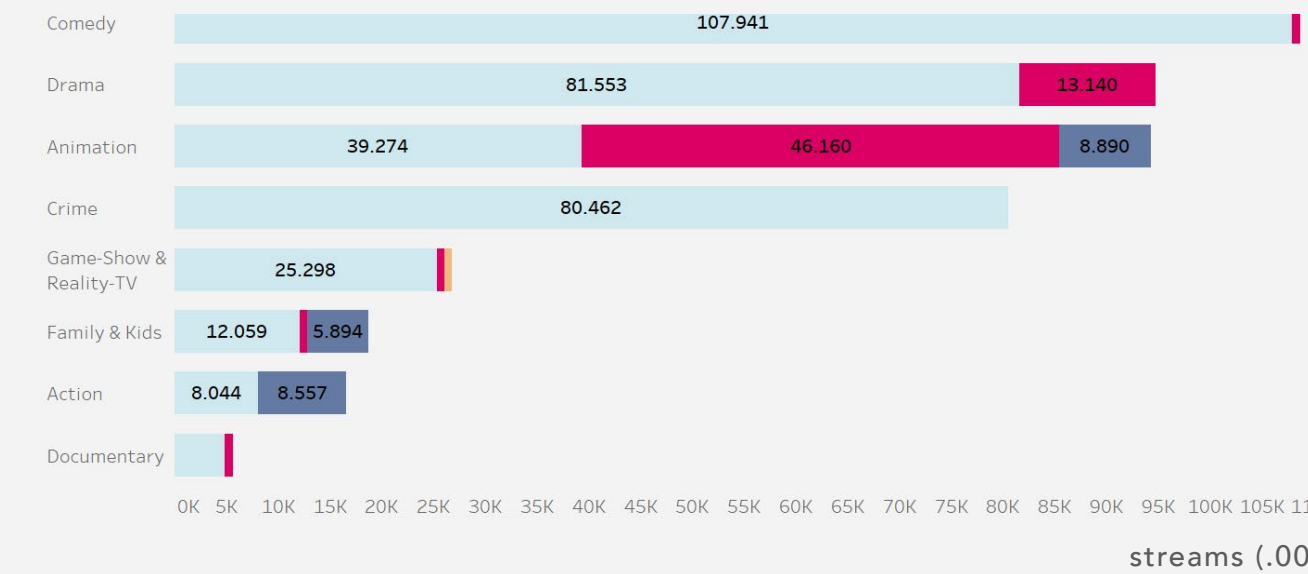
SHOWING 30/100 - [See complete chart here](#)

streams (.000)

CATALOG SHARE BY COUNTRY NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES NETFLIX - AMAZON



streams (.000)

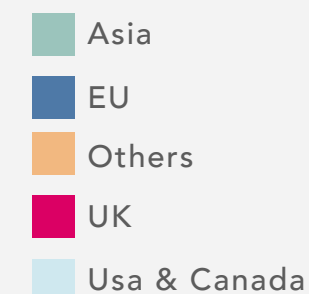
“STRANGER THINGS” HAPPENS TO DISPLACE “FRIENDS” FROM THE UK THRONE

The UK is a market hooked to American library shows and often sees them crowned in the very top positions regardless of fresh and keenly anticipated releases. However, in only 4 days after its launch, “Stranger Things” managed to amass 43M streams, to be placed at the very top. Old time favourites, “Peppa Pig” (39.7M streams) and “Friends” (37M streams) come next and occupy positions 2 and 3 respectively. Newer American shows such as “The Lincoln Lawyer”, “Ozark” and animated series “Love, Death & Robots” hit important positions and 20M streams on average each.

THE UK IS EVEN MORE AMERICAN THAN IN APRIL

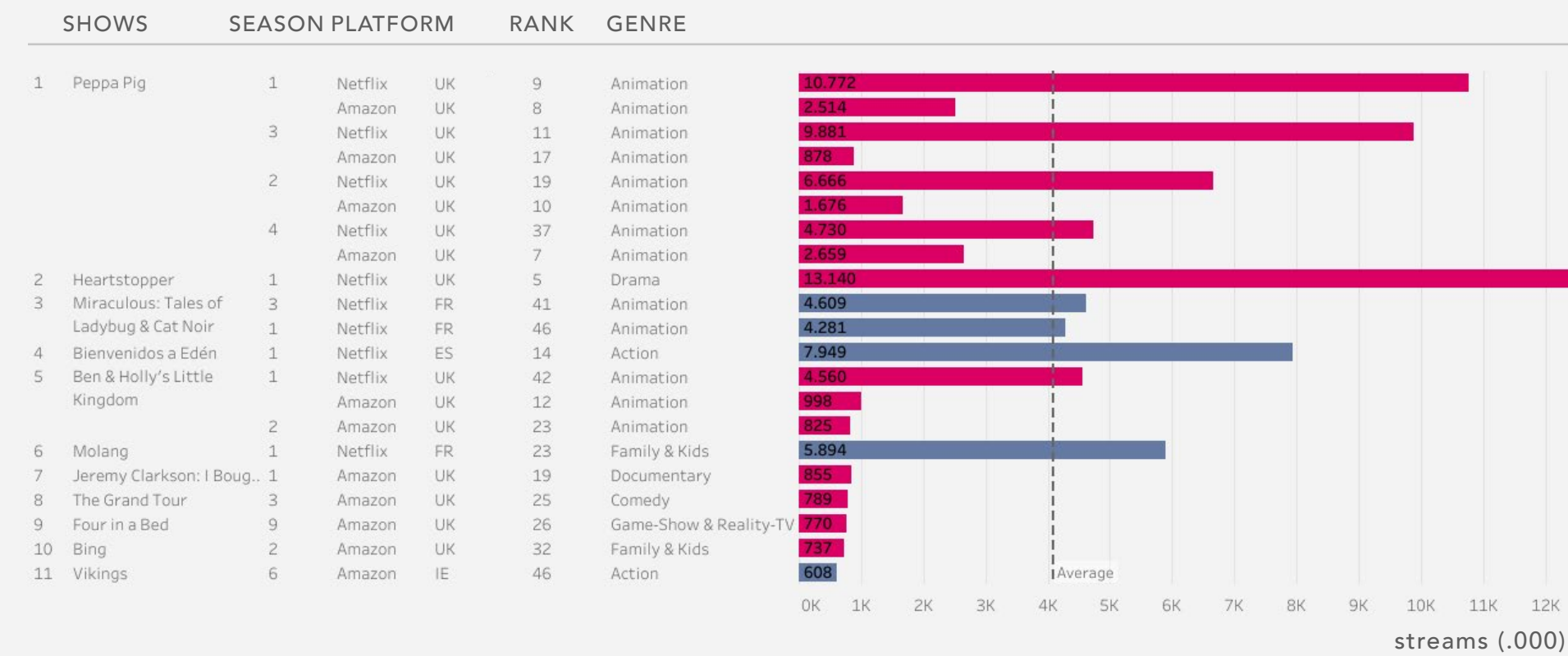
American and Canadian productions hold nothing less than 78% of the UK market; that’s 11 extra points compared to April, but is not an unprecedented figure for this territory. Germany is the only European market with comparable US origin percentages, while the other analysed territories are more open to their local content and other origins.

PRODUCTION COUNTRIES

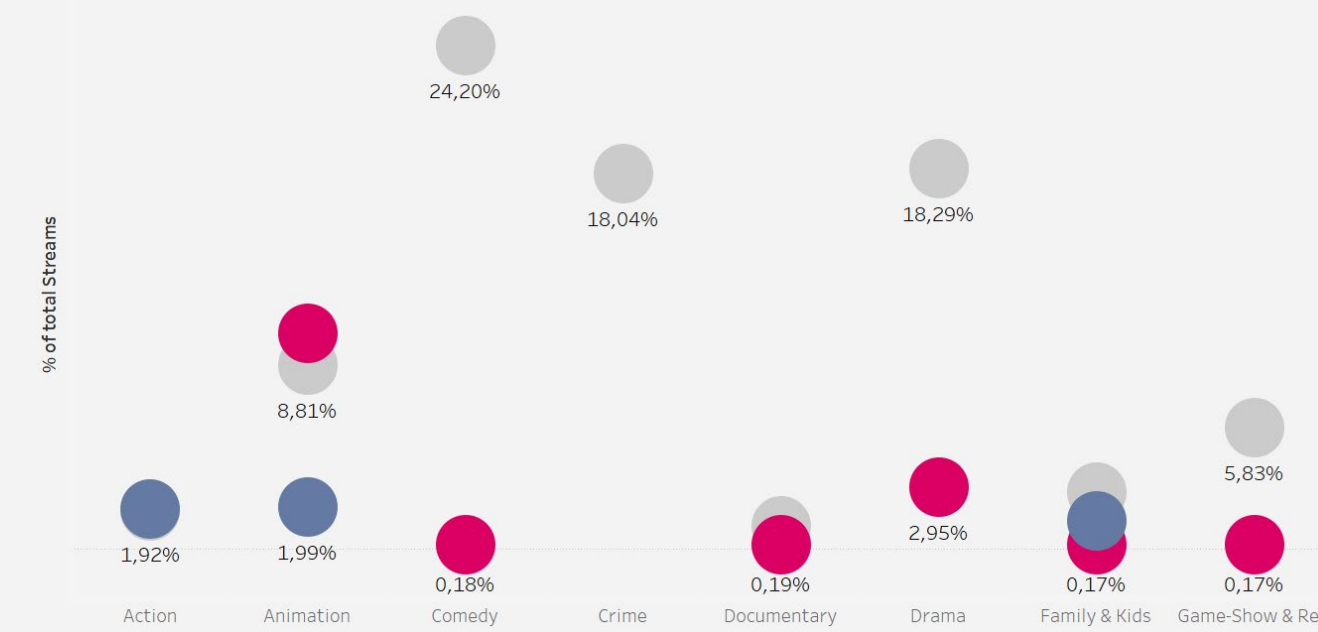


UK 100 SHOWS | EUROPEAN FOCUS

LOCAL AND EUROPEAN SHOWS IN THE TOP 100 NETFLIX - AMAZON



CONTRIBUTION OF LOCAL & EUROPEAN SHOWS TO TOTAL STREAMS NETFLIX - AMAZON



UK-PRODUCED SHOWS ARE SCARCE IN THE TOP POSITIONS OF THEIR HOME COUNTRY

A close look at “Peppa Pig” reveals that the first season is, by far, the most popular and that the next three are also widely consumed across both Netflix and Amazon. “Heartstopper” earns position 2 in the UK and European grid with 13M streams. Based on a webcomic and graphic novel by Alice Oseman, this acclaimed LGBTQ+ show got the same amount of views in April in only one week. Check our Hot Titles section for more information about it.

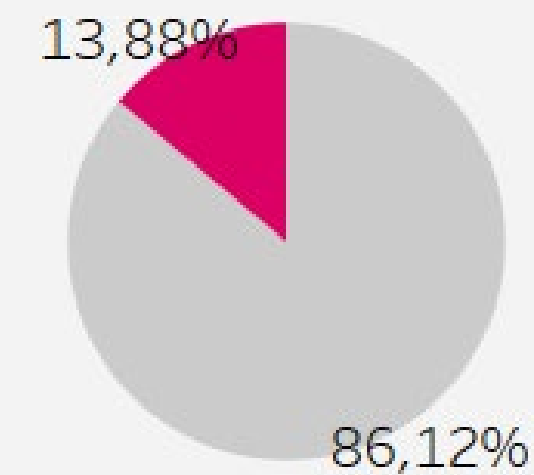
EUROPE HOLDS ONLY 5% OF THE UK MARKET BUT SPANISH CONTENT BREAKS THROUGH

“Bienvenidos a Edén” pleased the UK audience, and was the only real image European show in successful positions this month with 8M streams. Quite an achievement if we consider that there were no European shows in the top grid in the UK in the first quarter of the year and that during the second quarter the only European show performing well was also Spanish: “Elite” in March, with 5M streams. Besides, this month, French-produced family & kids animations “Ladybug” and “Molang” achieved 9M views and 6M views respectively. Still, Europe has only 5% of the UK market.

NUMBER OF TITLES BY GENRES NETFLIX - AMAZON

GENRE	EU	UK
Action	2	
Animation	1	2
Comedy		1
Documentary		1
Drama		1
Family & Kids	1	1
Game-Show & Reality-TV		1

CONTRIBUTION TO DRAMA STREAMS

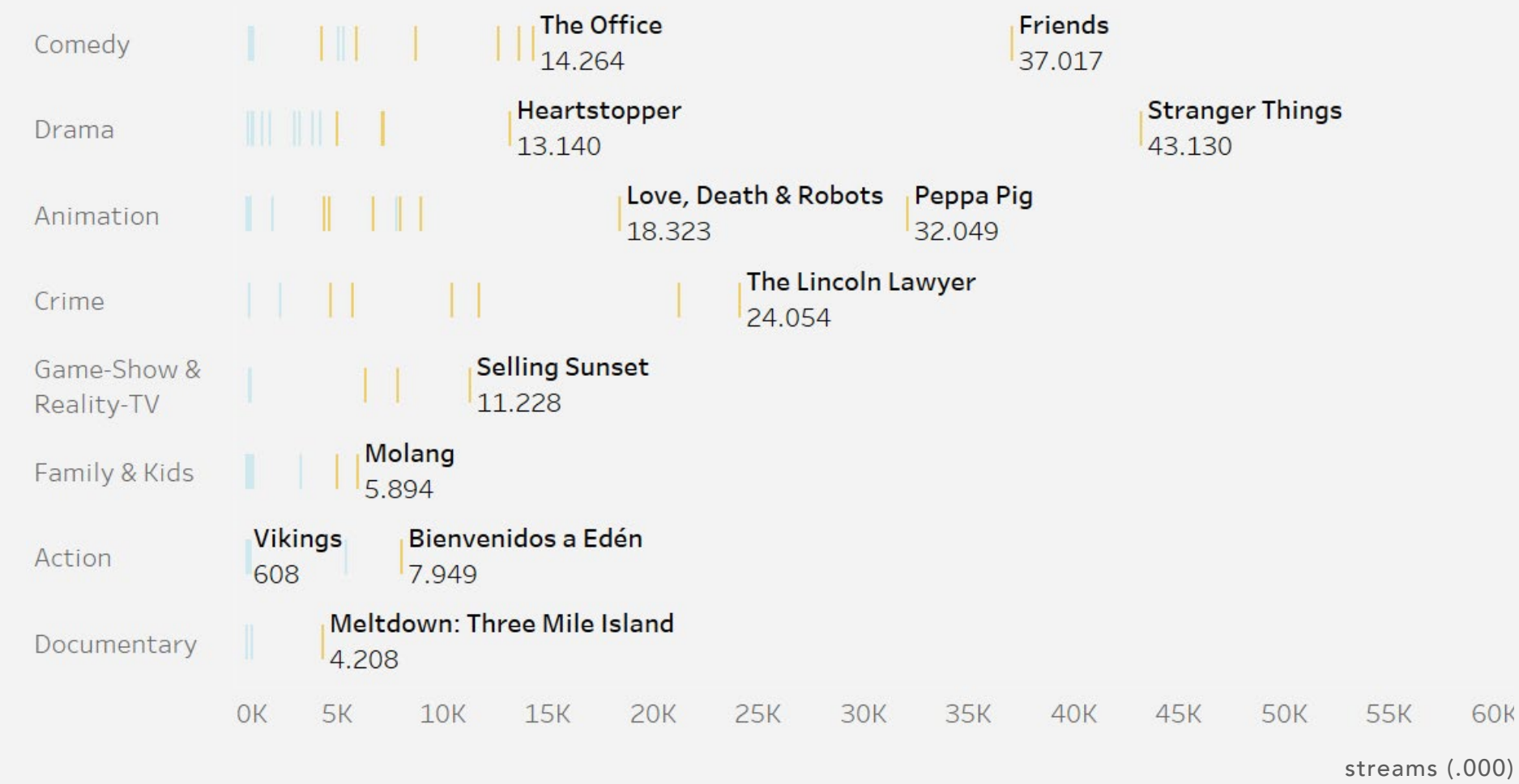


PRODUCTION COUNTRIES



UK 100 SHOWS | SVOD PLATFORMS

TOP SHOWS STREAMS BY GENRES



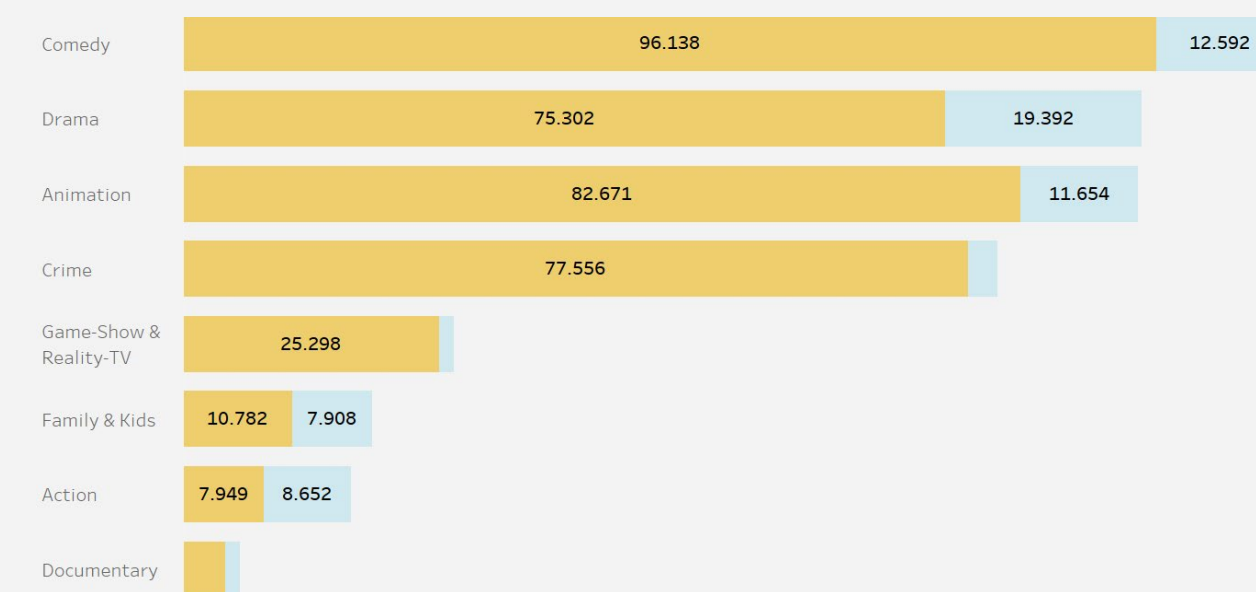
MOST WATCHED GENRES SHARE BY PLATFORM



AMAZON DOESN'T HAVE A LOCOMOTIVE BUT STILL HOLDS 15% OF THE STREAMS

A cascade of streams across several shows makes the E-commerce platform relatively competitive in Comedy, Drama and Animation. All the most popular children's shows are available on both platforms: 7M of the cumulated 39M streams of "Peppa Pig" belong to Amazon. Similar phenomena occur with "Paw Patrol", "Ben & Holly's Little Kingdom" and "The Big Bang Theory". Shows like "Star Trek: Picard" and "This is Us" are in #27 and #28 with 5M streams.

TOTAL STREAMS BY GENRES PLATFORM COMPARATIVE



OTT

- Amazon
- Netflix

streams (.000)

HOT CONTENT IN UK

“HEARTSTOPPER” OR HOW TO CREATE AN IP FRANCHISE FROM SCRATCH.

Originally a webcomic on Tumblr and Tapas, “Heartstopper” has amassed an enormous online fanbase. Alice Oseman, born in 1994, started her own project, crowd-funding a limited print-run edition, meeting her funding goal in less than two hours. Now she has 4 volumes, a yearbook and a colouring book, which have sold millions of copies worldwide. She has 16M followers on Instagram and half a million on Twitter. In addition, she has created new stories under the YA Novels label, which have Nick and Charlie as characters in some stories. An IP Franchise is born and many more could be created identifying the opportunities this show tackles.

See Saw, based both in the UK and Australia, are behind the production of this 4-episode mini-series. The company has won the Academy Award with Jane Campion’s “The Power of the Dog”, and several other awards, with productions like “Lion”, “The King’s Speech”, “The Stranger”, “The Son” and “Foe”. Their first series was Jane Campion’s “Top of The Lake”, which opened the door for many more television shows now on different platforms and broadcasters. “Heartstopper” has been renewed by Netflix for two more seasons and shooting will start in September 2022.

Oscar-winner Olivia Collman plays Nick’s mother. The rest of the characters are young teens discovered and made famous by the series. If you browse the internet for

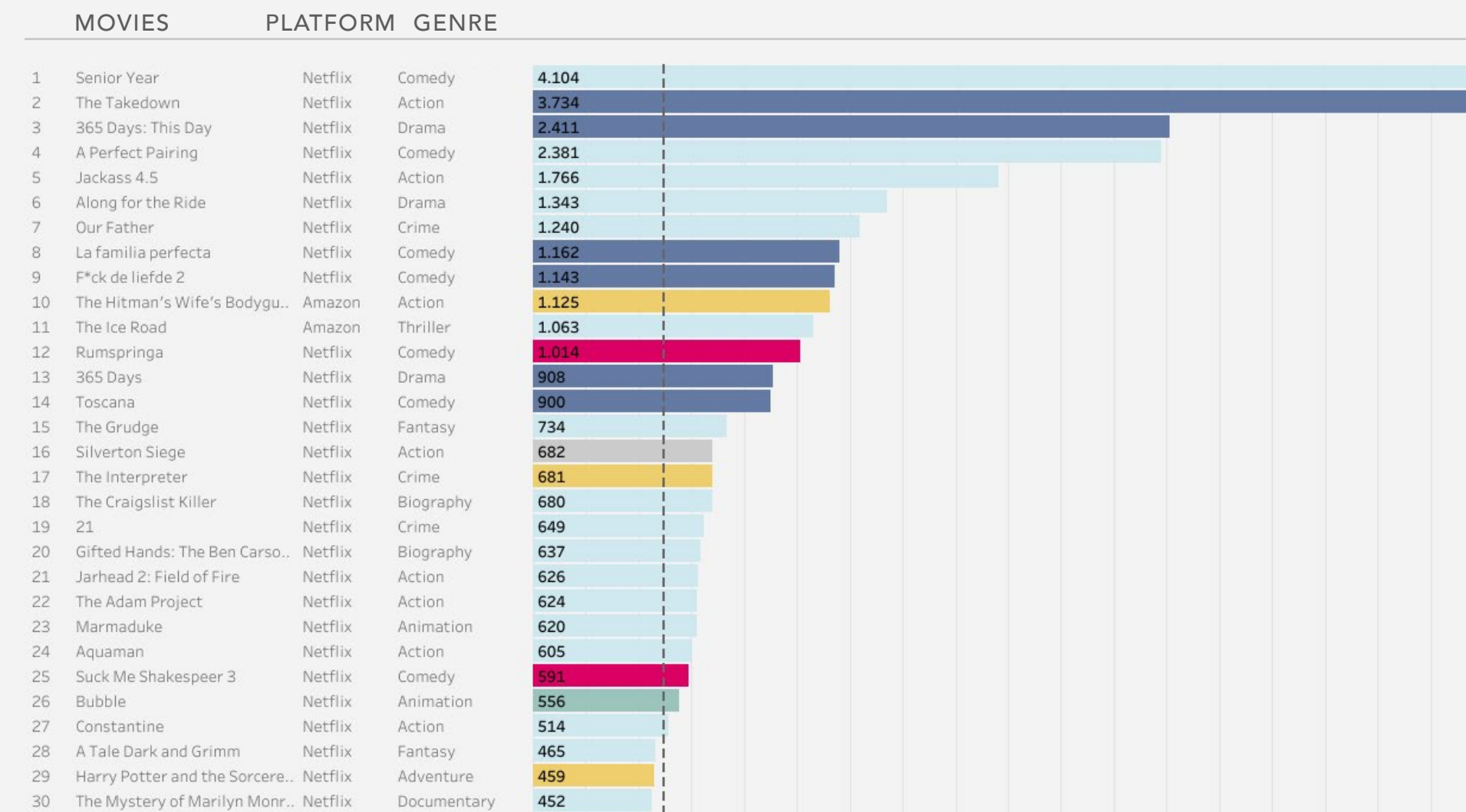
5 minutes you will get an idea of how big “Heartstopper” is: the UGC “user generated content” and non-official merchandising across all types of platforms reveals that it is warmly embraced by audiences. The naive illustrations that accompany the comic and the marketing of the series suggest a young, modern and fresh tone when applied to a sensitive new masculinity. The characters say “HI HI” several times in the trailer, and this is the effective trick to build the love story. What starts as an impossible admiration for the rugby-playing-perfect, supposedly straightest guy in the school, who turns out to be a truly beautiful story: simple” one, but one not so often told: boy meets boy.

The data also speaks for itself: “Heartstopper” is performing well across all 5 analysed markets in a similar way and with a strong and steady presence amongst the top 20 in both April and May. The UK, its local market, cumulates 27M streams in both months, followed by 16.5M in Spain, 11.2M in Germany, 10M in France and 7.3M in Italy.



GERMANY 100 MOVIES | OVERVIEW

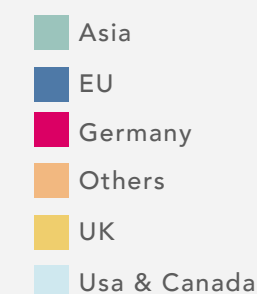
TOTAL STREAMS BY MOVIE NETFLIX - AMAZON



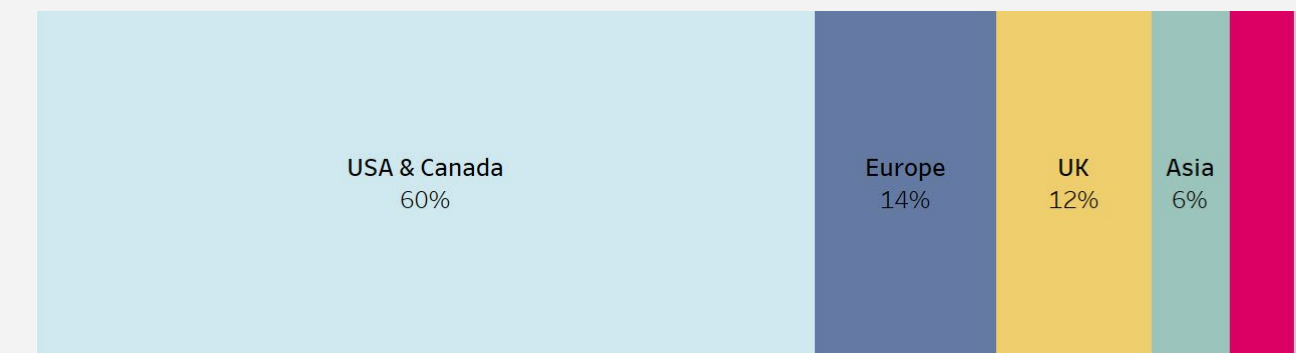
SHOWING 30/100 - See complete chart here

streams (.000)

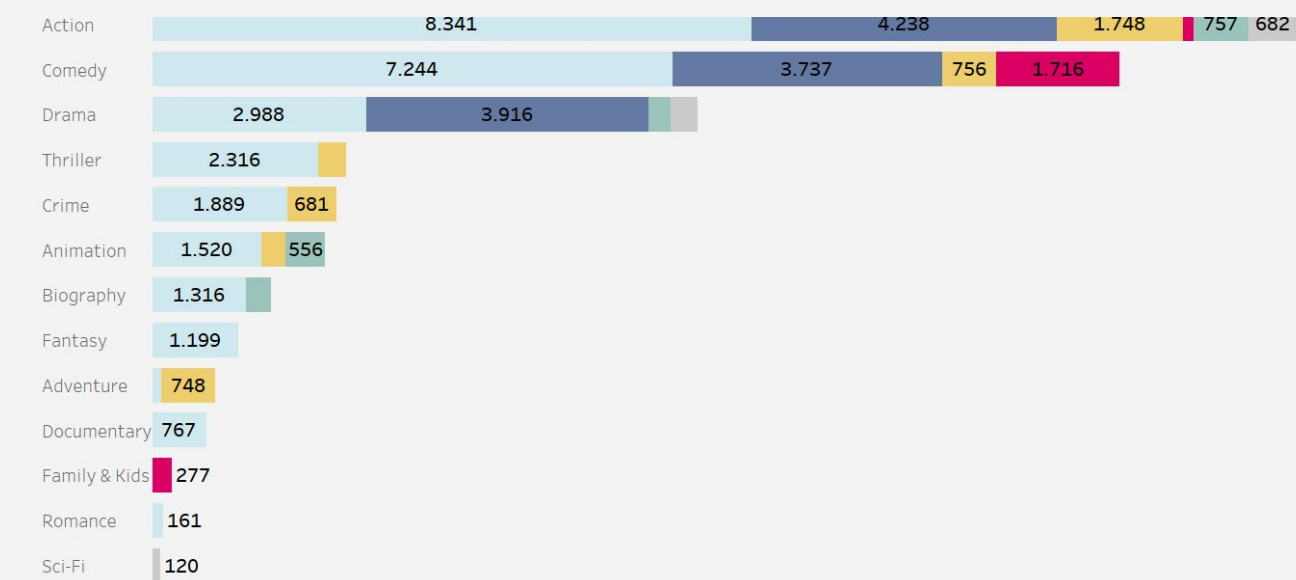
PRODUCTION COUNTRIES



CATALOG SHARE BY COUNTRY NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES NETFLIX - AMAZON



streams (.000)

UBIQUITOUS AMERICAN CONTENT REINFORCES ITS PRESENCE IN THE GERMAN MARKET WITH 60% OF THE SHARE AND HALF OF THE FILMS IN THE TOP20

The very American comedy "Senior Year" and the romantic Comedy "A Perfect Pairing" in positions #1 and #4, with 4.1M and 2.3M streams, make us think of Comedy as the preferred imported genre. If we take a closer look, we find a very rich diversity of genres: from Action, represented by "Jackass 4.5" in position #5 and 1.7M streams, to Drama ("Along for the Ride"), crime and true-crime documentary "Our Father", "21" and "The Craigslist Killer". If we consider UK content, its share rises to 82%.

LOCAL CONTENT DOES NOT TAKE ROOT IN GERMANY AND HAS EXPERIENCED A BIG DROP SINCE APRIL

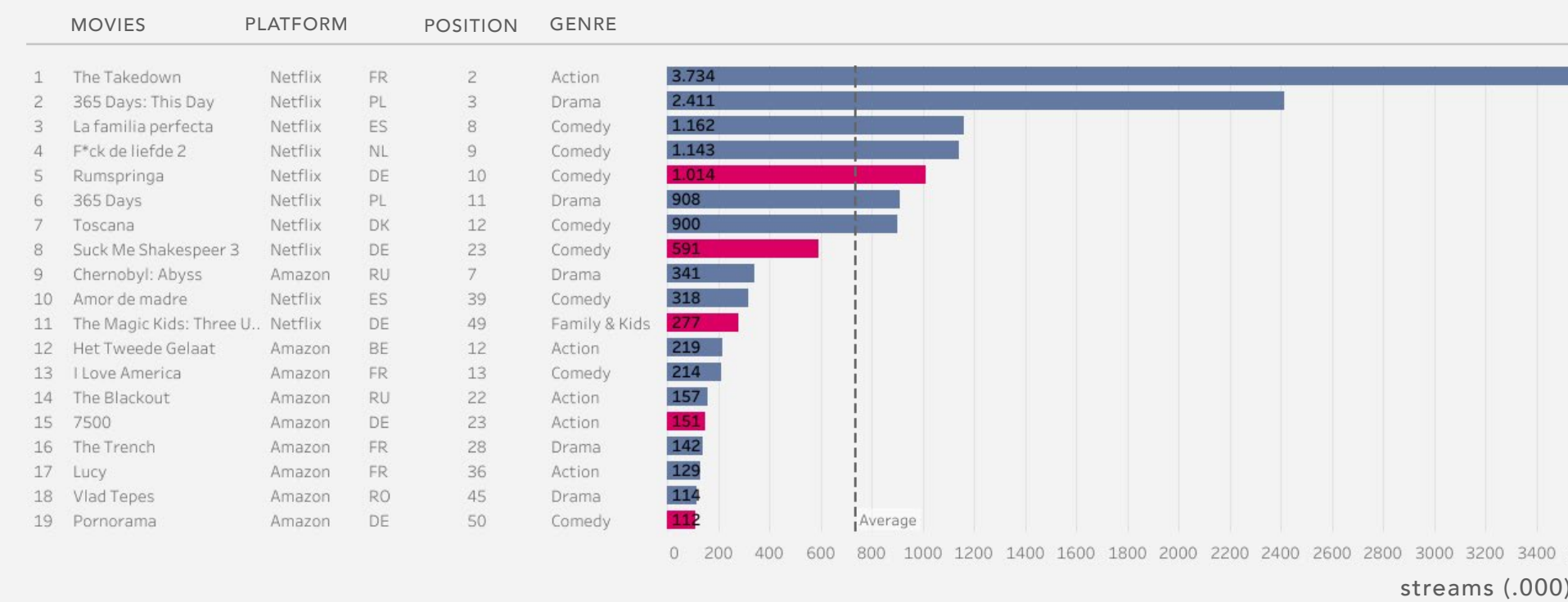
Germany presents the lowest local share among the five countries with 5% - and none of them shows above average results. German content has withdrawn from the TOP10. We need to go down the chart to position #12 to find "Rumspringa", the feel-good comedy about a young Amish in Berlin that has collected 1M streams since its release on April 29.

ASIAN CONTENT IS SLOWLY GAINING GROUND IN GERMANY

The upward trend continues, with 9% of the share, 2 points more than the previous month. Animation Post-apocalyptic film "Bubble", Action Indian film "RRR", or Turkish romantic drama "Yolun Açık Olsun", are some examples of the wide variety of preferences of German audiences.

GERMANY 100 MOVIES | EUROPEAN FOCUS

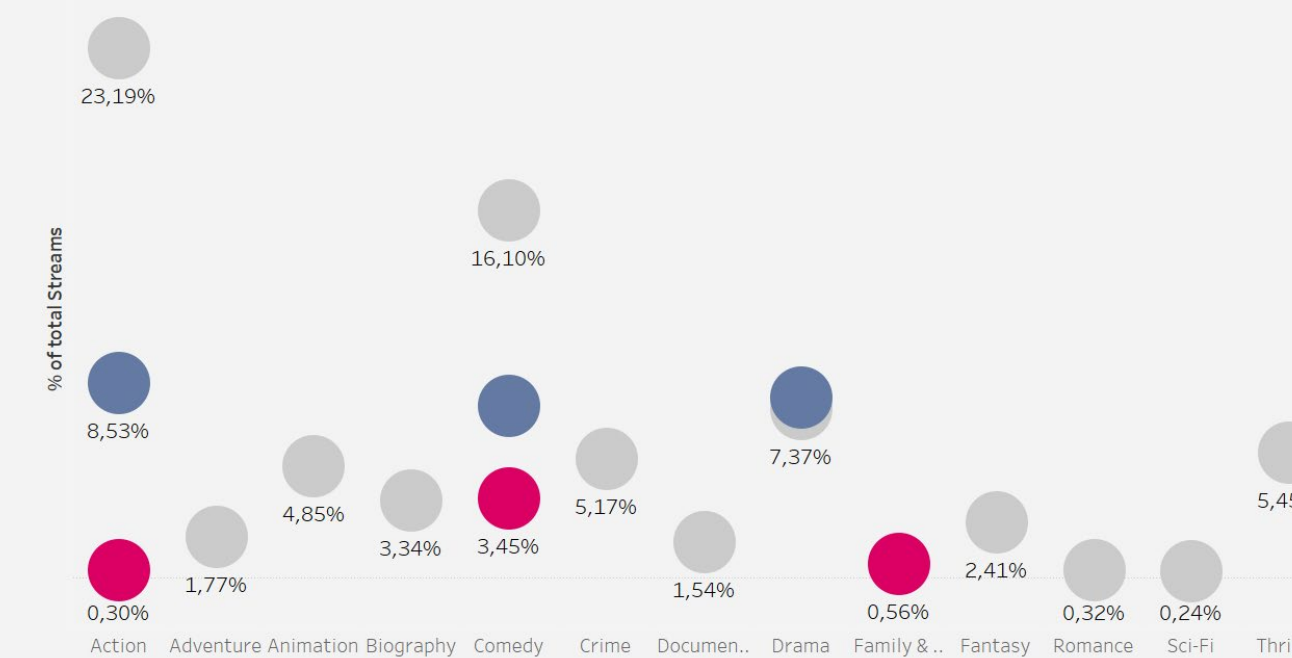
LOCAL AND EUROPEAN MOVIES IN THE TOP 100 NETFLIX - AMAZON



PRODUCTION COUNTRIES



CONTRIBUTION OF LOCAL & EUROPEAN MOVIES TO TOTAL STREAMS NETFLIX - AMAZON



DRAMA AND COMEDY ARE THE PREFERRED GENRES FOR EUROPEAN AND LOCAL CONTENT, FOLLOWED BY ACTION

The French Action-comedy "The Takeover" starring Omar Sy heads the chart with 3.7M views, followed in position #2 with 2.4M streams by Polish erotic-drama "365 Days: This Day", the sequel of the massive, and controversial, Polish success "365 Days". In positions #3, #4 and #5 we find three comedies in a row: Spanish comedy "La Familia Perfecta", the Dutch Comedy "Fuck the liefde" and the local comedy "Rumspringa".

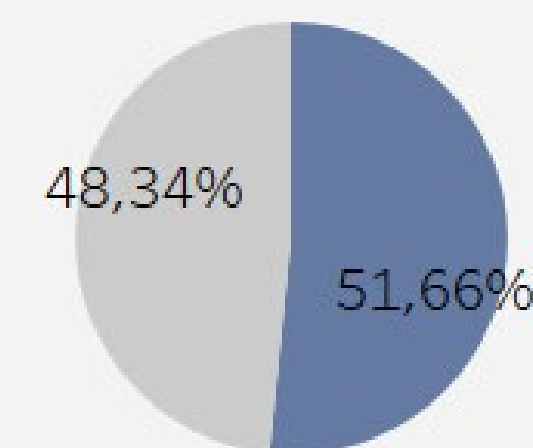
GERMAN CONTENT DOESN'T STAND OUT

last month, local comedies outdid productions of other origins, but this month we see how local content has deflated and is poorly represented among the TOP100: only 5 titles out of the 17 on the list are German.

NUMBER OF TITLES BY GENRES NETFLIX - AMAZON

GENRE	EU	GERMANY
Action	4	1
Comedy	5	3
Drama	5	
Family & Kids		1

CONTRIBUTION TO DRAMA STREAMS



DRAMA AND COMEDY TIE IN THE COMMON BATTLE OF GENRES

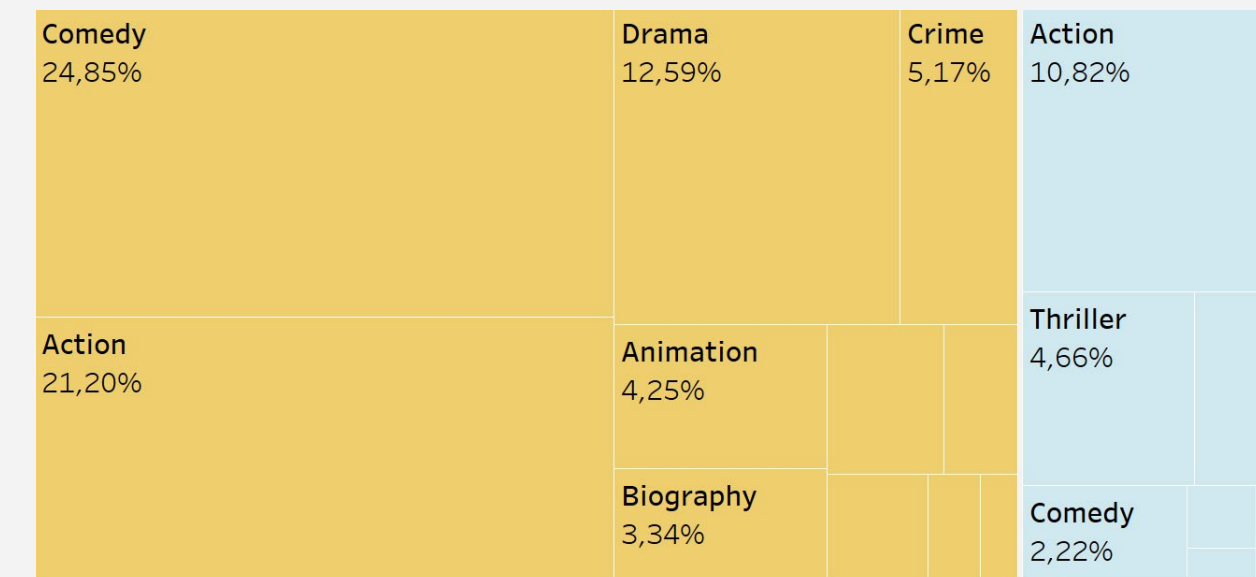
Led by the Netflix-produced sequel "365 Days", the Polish erotic romance based on Blanka Lipiska's trilogy released on April 27 made 2.4M streams for the second movie and also helped the first instalment to surface again, with 908K streams.

GERMANY 100 MOVIES | SVOD PLATFORMS

TOP MOVIES STREAMS BY GENRES



MOST WATCHED GENRES SHARE BY PLATFORM



ACTION IS THE MOST WATCHED CONTENT, IF NETFLIX'S AND AMAZON'S STREAMS ARE PUT TOGETHER: 17.6M STREAMS ARE LABELLED WITH THIS TAG

Action and Comedy are the most popular genres in Germany. And when Action meets comedy, it seems to be the perfect match for German Audiences: On Netflix, the release of French action-comedy "The Takedown" fuelled this genre, collecting 3.7M streams, whereas on Amazon "Hitman's Wife's Bodyguard" became the most watched film on the e-commerce platform, with 1.1M streams.

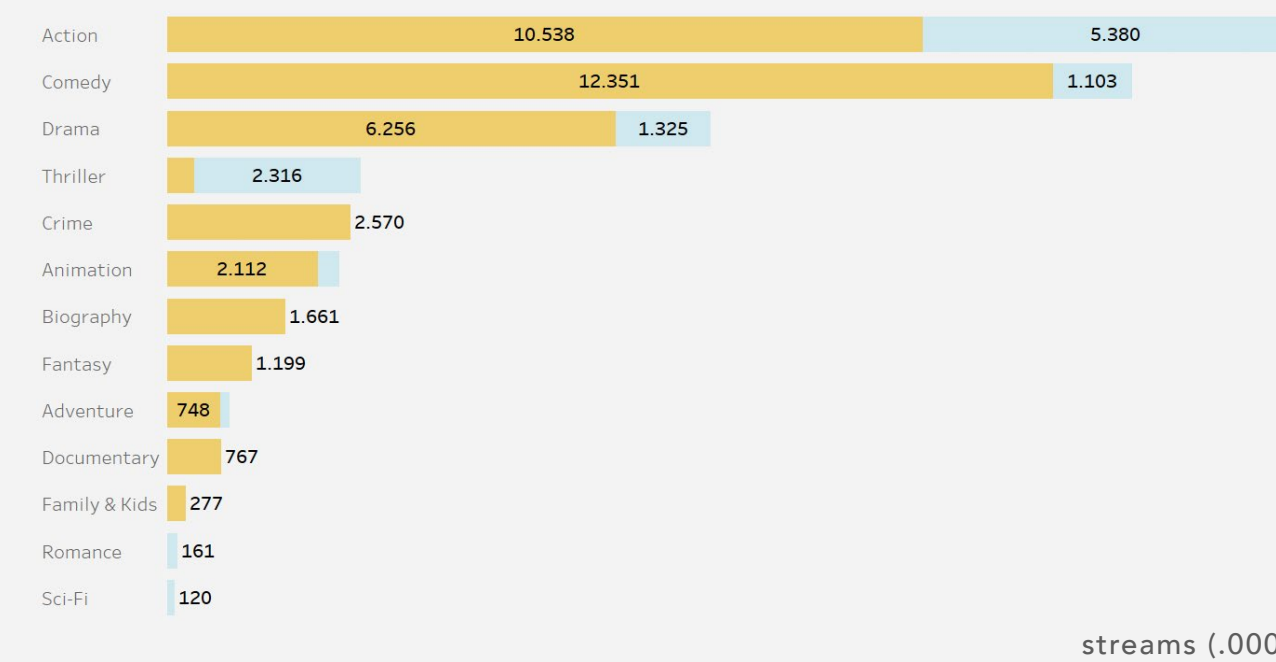
ACTION IS ALSO THE BIGGEST GENRE, WITH 36 MOVIES CLASSIFIED IN THE GRID, AGAINST THE SECOND BEST, COMEDY, WITH 16 TITLES AND FOLLOWED BY DRAMA, WITH 14 TITLES

Comedy ranked #1 on Netflix with 12.3M streams. The American comedy "Senior Year" propelled this genre as the most watched on the "N" platform with 4.1M streams. It is followed, with humbler results, by "A Perfect Pairing", Fuck the liefde, Rumspringa and Toscana.

AMAZON STANDS OUT IN THE THRILLER GENRE, THE ONLY CATEGORY WHERE NETFLIX YIELDS TO PRIME VIDEO

With Netflix collecting around 80% of total streams, Thriller gives a small victory to Amazon. It is also the second most watched genre on this platform with 2.M streams, half of them collected by "The Ice Road", starring Liam Neeson.

TOTAL STREAMS BY GENRES PLATFORM COMPARATIVE

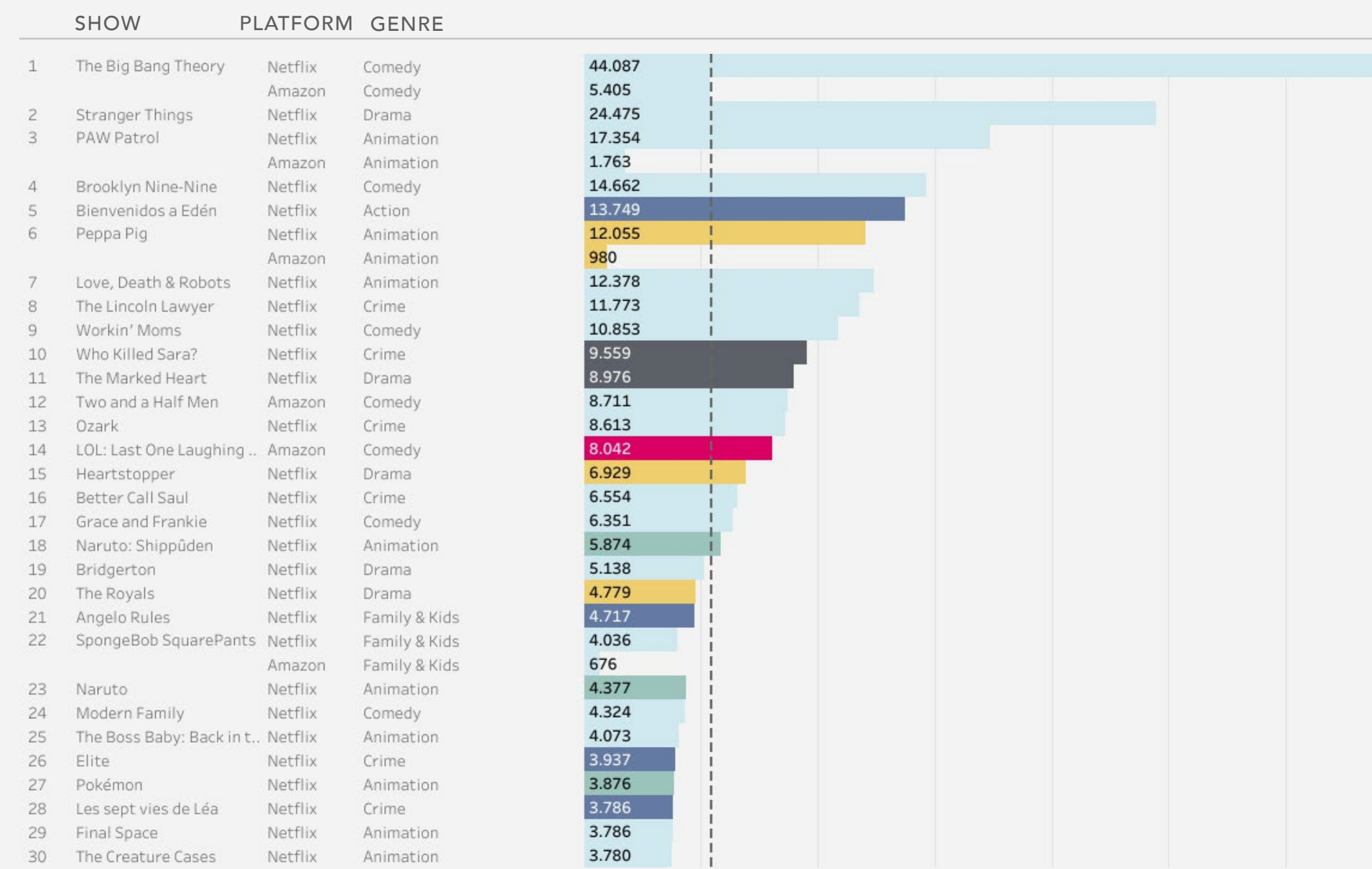


OTT

- Amazon
- Netflix

GERMANY 100 SHOWS | OVERVIEW

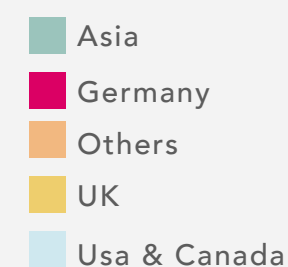
TOTAL STREAMS BY SHOW NETFLIX - AMAZON



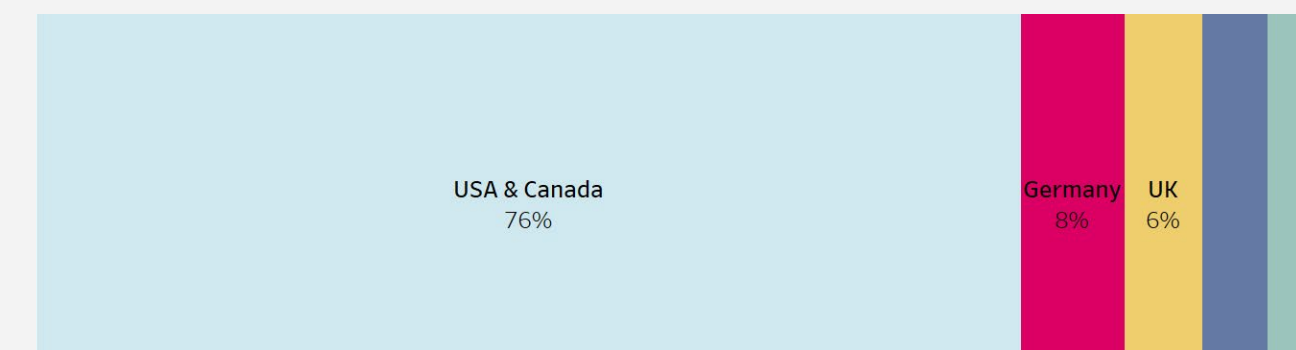
SHOWING 30/100 - See complete chart here

streams (.000)

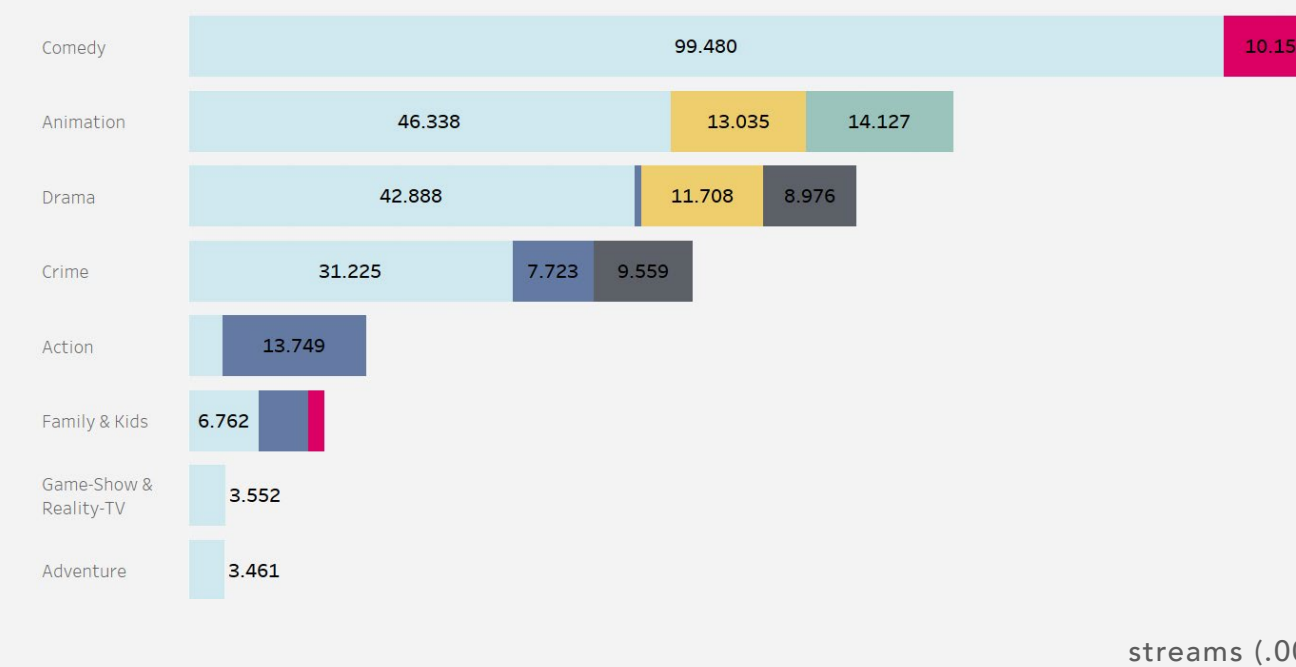
PRODUCTION COUNTRIES



CATALOG SHARE BY COUNTRY NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES NETFLIX - AMAZON



streams (.000)

ENGLISH-SPEAKING CONTENT HOGS THE TOP20, WITH THE EXCEPTION OF THREE SPANISH-SPEAKING SHOWS

15 out of 20 shows are English-speaking. In position #1 we find an already familiar face in the charts, the prolific sitcom "The Big Bang Theory", which collected 44M views. It is followed at some distance by Stranger Things (#2, 24M), PAW Patrol (#3, 17M) and another American sitcom, "Brooklyn Nine-Nine" (#4, 14.6M).

In position #5, we find the Spanish dystopian thriller "Bienvenidos a Edén", with 13.8M streams, the first non-English-speaking show in the TOP9. We find two other Spanish-speaking shows in positions #10 and #11: "Who Killed Sara?" and "The Marked Heart", which cumulated 9.5M and 8.9M streams respectively.

LATIN TELENOVELAS CONQUER POSITIONS #10 AND #11 OF THE GRID: "WHO KILLED SARA?" AND "THE MARKED HEART" COLLECTED 9.5M AND 8.9M STREAMS EACH

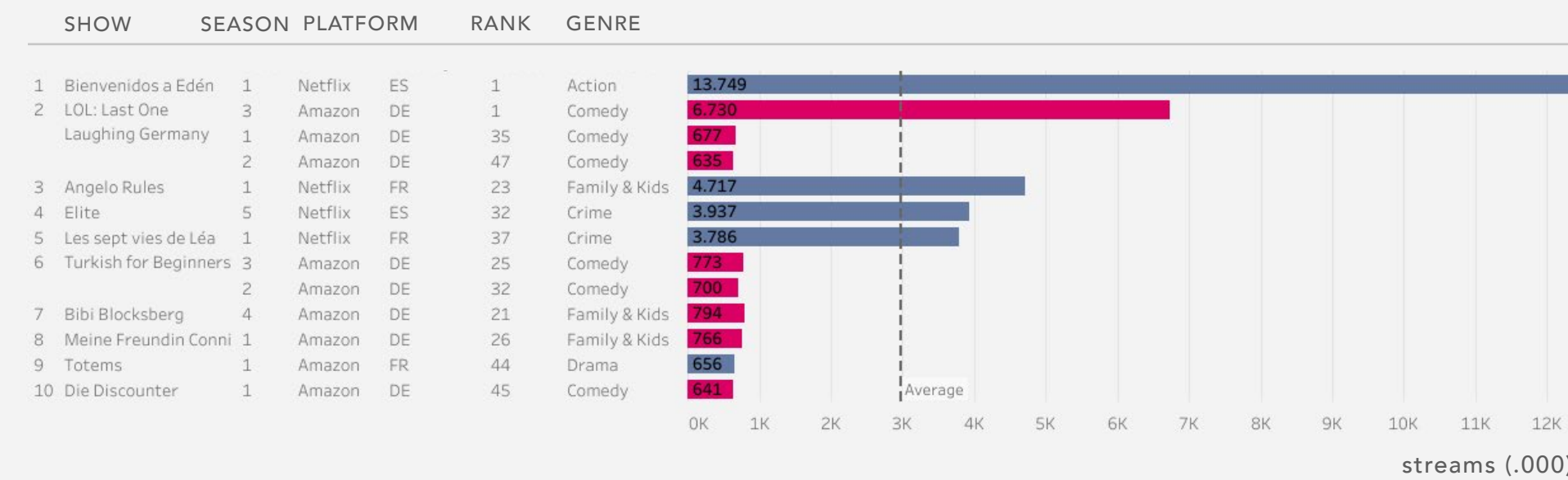
Latam content has climbed up the charts in May, showing that, despite the English-speaking monopoly (76% of the streams have been collected by American content: 39 titles amassed 234.6M streams), German Audiences are open to diversity too.

COMEDY AND ANIMATION: THE KEY GENRES IN MAY

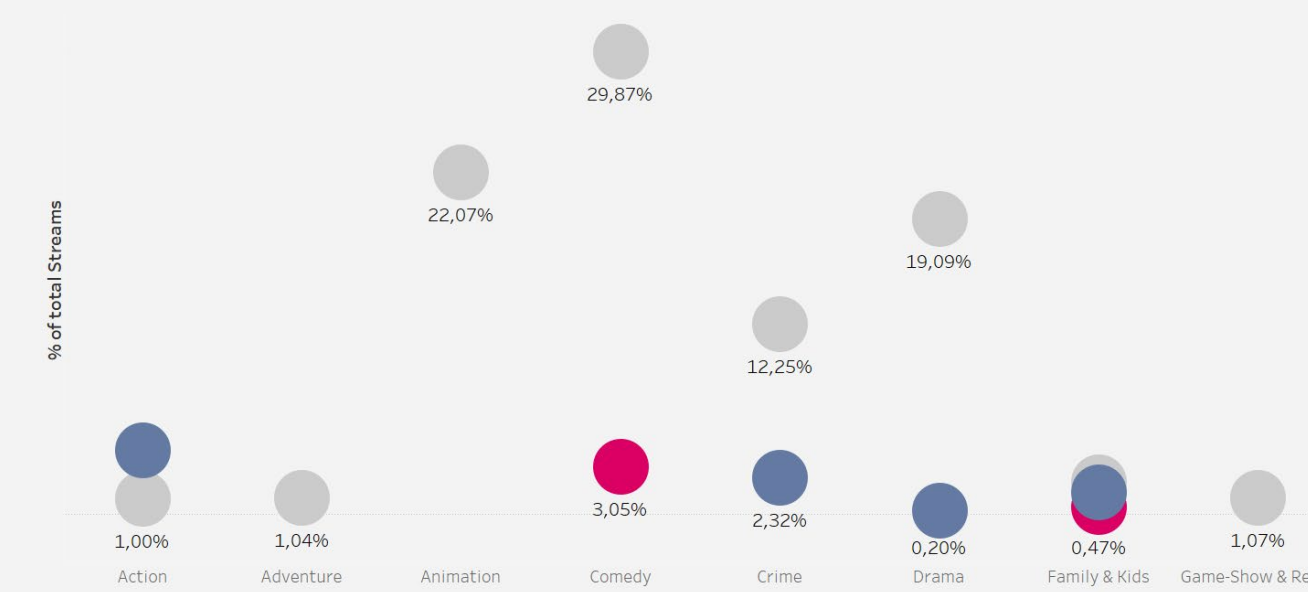
Comedy has been the most watched genre this month, gathering 109M views, with 15 shows in the charts. American sitcoms like "The Big Bang Theory", "Brooklyn Nine-Nine" or "Working Mums", are mainly responsible for this, although some local shows are spread here and there on the chart: "LOL: Last one laughing" and "Turkish for Beginners" are the local representatives in this genre.

GERMANY 100 SHOWS | EUROPEAN FOCUS

LOCAL AND EUROPEAN SHOWS IN THE TOP 100 NETFLIX - AMAZON



CONTRIBUTION OF LOCAL & EUROPEAN SHOWS TO TOTAL STREAMS NETFLIX - AMAZON



AMAZON IS WORKING ON LOCAL CONTENT AND IT'S PAYING OFF

The only 5 local contents that made it into the TOP100 belong to Amazon's catalogue: heading the list with 8M streams is the comedy-gameshow "LOL: Last One Laughing Germany" in which ten German comedians try to be the last one laughing. With less satisfactory results, we find the acquired series "Turkish for Beginners" that was aired in 2006 on the TV Channel Das Erste.

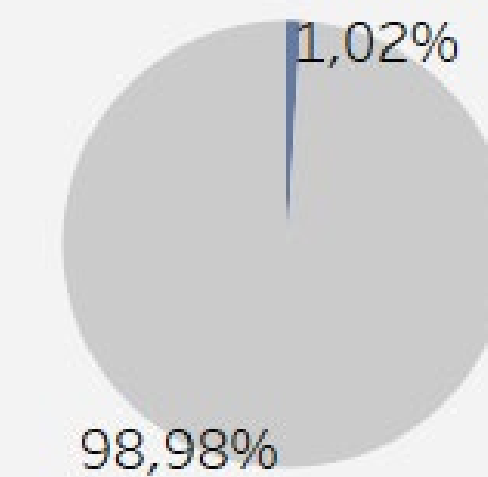
EUROPEAN TEEN CONTENT CONQUERED GERMAN CHARTS

the Spanish dystopian thriller "Bienvenidos a Edén", one of Netflix's biggest bets of the season, has been the most watched European content of the month, with 13.7M views. Season five of "Elite" follows in fourth position with 3.9M. The French crime teen series "Les sept vies de Léa", in position #5 with 3.7M, also delivered above average results.

NUMBER OF TITLES BY GENRES NETFLIX - AMAZON

GENRE	EU	GERMANY
Action	1	
Comedy		3
Crime	2	
Drama	1	
Family & Kids	1	2

CONTRIBUTION TO DRAMA STREAMS



PRODUCTION COUNTRIES

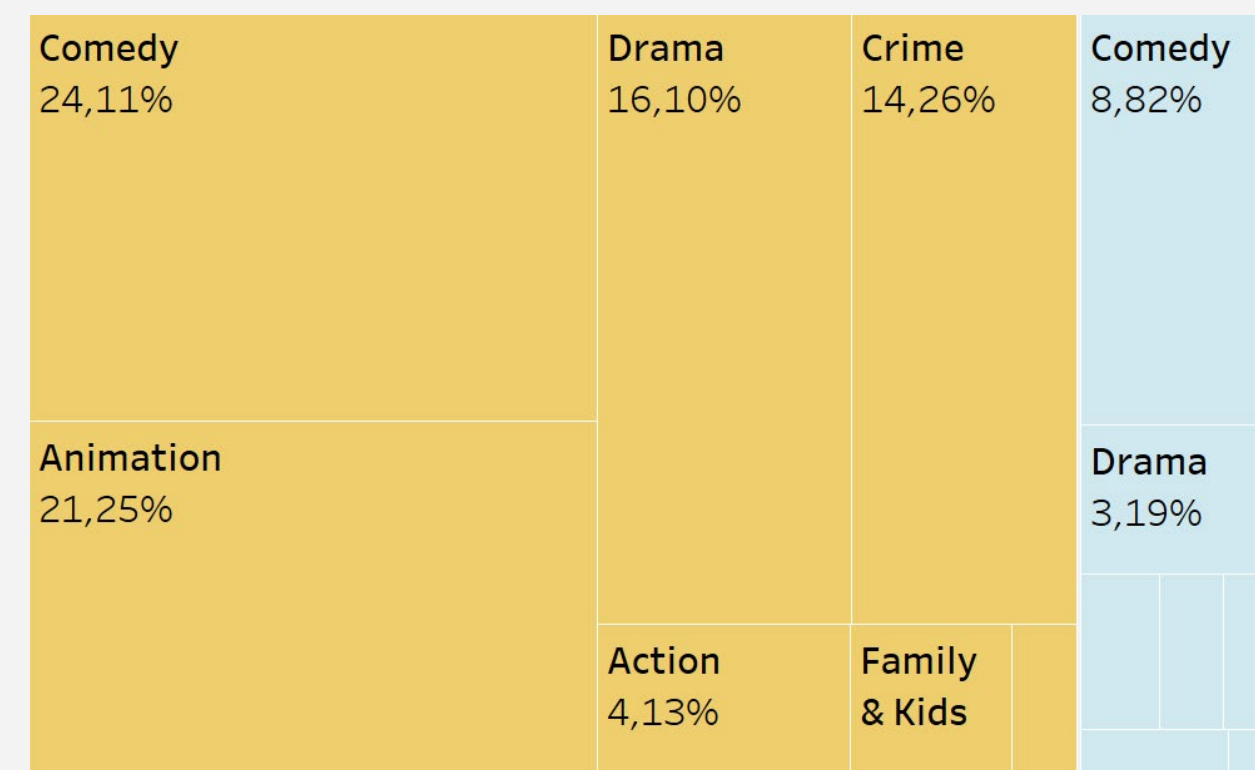
- Europe
- Germany
- Others

GERMANY 100 SHOWS | SVOD PLATFORMS

TOP SHOWS STREAMS BY GENRES



MOST WATCHED GENRES SHARE BY PLATFORM



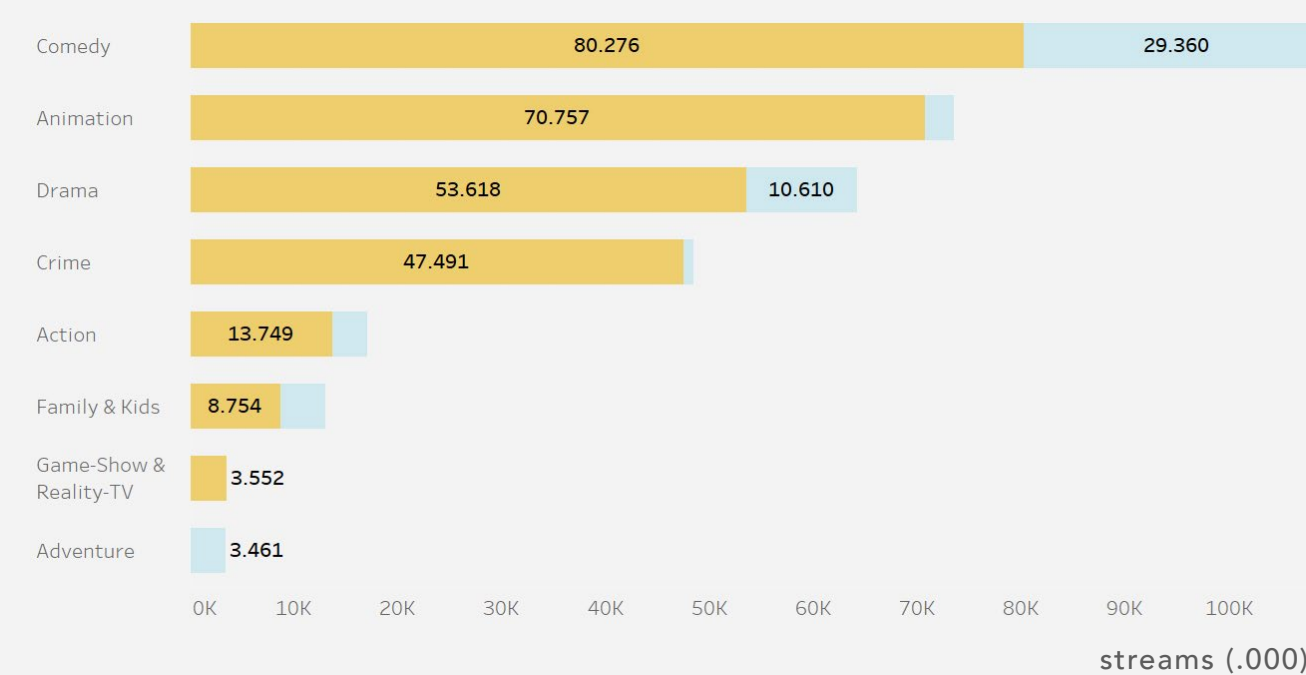
ANIMATION AND FAMILY AND KIDS CONTENT BECAME THE SECOND MOST WATCHED GENRES WITH 97.7M TOTAL STREAMS

The beloved and prolific gang of puppies propelled the category to the podium: PAW Patrol in position #3 amassed 17.3M streams. But the good state of health of this genre is not only thanks to the Canadian franchise; it's been teamwork: "Love, Death and Robots", the anthology of animated stories for adults whose third season was released in May, cumulated 12.3M streams. "Peppa Pig" also presents above-average results (12M streams).

COMEDY IS BACK IN THE THRONE, CROWNED AS THE MOST WATCHED GENRE ON NETFLIX AND AMAZON

after losing some presence in April to Action and Drama, Comedy reinforced its position with 33% of the share and 109.3M streams. Drama, on the other hand, is the third preferred genre this month, collecting 53.6M streams on Netflix and 10.6M on Amazon.

TOTAL STREAMS BY GENRES PLATFORM COMPARATIVE



AMAZON SHORTENS DISTANCES IN GERMANY AGAIN

Germany is, for the second month in a row, the country where the gap between the two platforms is smallest, delivering 17% of share.

Among the best performing shows of this platform, we find the American sitcom "Two Men and a Half" (#12), which collected 8.7M streams, and "LOL: Last One Laughing", the comedy game show (#14) with 8M streams, and the Amazon Original "The Wilds", down the charts in position #32, with 3.4M streams.

OTT

- Amazon
- Netflix

HOT CONTENT IN GERMANY LATAM TELENOVELAS. ON THEIR WAY TO CONQUERING EUROPEAN MARKETS.

In April, we identified a potential trend that was, to a greater or lesser degree, transversal across the analysed countries except for the UK: LATAM content has been slowly penetrating borders beyond the Spanish-speaking audience, hitting territories such as France, Germany or Italy, and proving that language is not a barrier to increasing Telenovelas' travelability. From October 2021 onwards, we witnessed how this content, has, little by little, been sneaking into the TOP25 of the French charts with titles like "The Queen of Flow" or "The Marked Heart". The latter was responsible for what seems to be a regular presence of Latam productions in the French market, gathering 11M views and was the #7 most streamed show in France in April.

LATAM Telenovelas have been a common presence on Spanish lineal TV grids for decades, bringing together in front of the television up to three generations – grandma, daughter, and granddaughter - completely hooked day after day to the most twisted storylines. But the Telenovela format is not new content on German small screens either: for decades, during the afternoon and early evening slots, German viewers have been exposed to secret love affairs, impossible romances, and storylines of unforgivable betrayal.

From the early 2000s on, Germany emerged as the leading producer of homegrown European telenovelas. The recipe for German success was to reshape the classic Latin American format into programming with a more European sensibility. Thus, we can say there is an existing tradition of telenovela watching among German audiences.

This inclination might be one of the determining factors that have made Germany the latest market to bow to these arcs of love, betrayal and passion set in LATAM: we have observed how two Telenovelas have conquered positions #10 and #11 of the TOP100 in May, making a stylish entrance into the German charts. One is the Mexican thriller series "Who Killed Sara?", which collected 9.5M streams. The other is the Colombian romantic thriller "The Marked Heart", which amassed 8.9M last month in that same country. Both titles are Netflix Originals, which confirms how crucial Netflix's investment in Spanish-speaking content has been in the last few years, after great hits like "Elite", "Money Heist", and "The Scent of a Woman", to name a few.

Is it a matter of time before UK audiences surrender to LATAM fiction as well?



GLOBAL TAKES

- 1 / Comedy Films and amusing tones were the key in May:** all markets embraced comedies: Spanish comedies "Mother's Love" and "Familia Perfecta"; Italian viral comedies "Mollo tutto e apro un Chiringuito" and "You Can't Kiss the Bride", very American "Senior Year" and French Action-comedy "The Touchdown" climbed to top positions. Dutch comedy shot in Ibiza, "F*ck the liefde", Danish comedy "Toscana" and German comedy, "Rumspringa", also stood out. Although some travelled more successfully than others, they were all important for both streaming giants and proved that foreign-language comedies do travel.
- 2 / Teens and Young Adults contents are also local:** Europe and the UK are important sources of local Young Adult stories that Netflix's audiences love. From British "Heartstopper" to Spanish "Bienvenidos a Edén", French "Sept Vies de Léa" and Italian "Summertime", several countries are contributing to the success of this category and proving that there's no isolated strategy that accounts for "Stranger Things" being the sole show that Netflix's subscribers maintained.
- 3 / Audiences were not indifferent to European Dramas:** Spanish drama "Once upon a Time in Euskadi" and Polish drama "365 Days: This Day" are both performing at a high level across territories. Added to "Stranger Things", these contents crowned Drama among the most popular genres.
- 4 / European Crime amasses important popularity across territories:** "Hold Tight" from Poland, "Les 7 vies de Léa" from France and "Clark" from Sweden. The crime documentary "Our Father" is also present in top positions across territories and significantly in the UK, France and Germany.
- 5 / While the American share is significant across all markets, Spain and Italy give the US the smallest slice of the cake:** Less than 50% of films and series views in the top 100 in Spain are American. Italy has an unequal share of 37% for films (lowest of all markets) but 70% for series (highest of all markets). The French, German and UK market give around 65% of their market share to American content, with similar levels for films and series. Italy and Germany have the slimmest local shares in series: 5% and 4% respectively.
- 6 / Amazon manages to squeeze into the top 20 in Spain with the show "Desaparecidos", and in some territories it improves results thanks to the James Bond saga.** However, overall, Prime Video is not standing out for many relevant contents. All efforts of Prime Video seem isolated since there's no month-to-month solidness nor true locomotives. Platforms are in search of successful IP to survive the Streaming churn storm.
- 7 / While the secret love for LATAM telenovelas started in Spain, it is now all over Europe.** In the first three reports of the year, we have seen how LATAM telenovelas climbed to the highest positions in Spain, becoming month after month one of the most streamed contents. The effect set Spain apart from the rest of Europe in terms of behaviour and consumption trends. However, from April onwards the trend has grown appreciably in countries like France, Italy and Germany.

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