

THINKDATA.

BRIDGING THE DATA GAP | JUNE 2022

THINK DATA: BRIDGING THE DATA GAP

BY CELIA FUMANAL - INNOVATION DIRECTOR



Summer was the playground for studios, which enjoyed their best time of the year, taking their heroes off the streets and bringing them into cinemas to make a killing at the box office. Recent turmoil in the industry shows that blockbusters are no longer the gold mine they used to be; not even certain stand-out titles are bringing the box-office returns that were once almost guaranteed.

Moving onto the question of the summer: Warner Bros. Discovery. CEO David Zaslav promised to slash and burn, letting everyone in Hollywood know he'd be making "big changes" when he was appointed as the new captain. Warner Bros. Discovery shares tanked on Friday, 5 August, after the board confirmed they wouldn't grow or make as much profit as Wall Street expected. The Math doesn't lie; the company, formed after the spin-off of WarnerMedia by AT&T in 2018 and its subsequent merger with Discovery in April 2021, owns five times more debt (around \$50 billion) than its profit (about \$9 billion). In such a scenario, the

honeymoon was soon over. Rumours of layoffs, cuttings costs, silent shrinking of the library and series cancellations swirled until the bomb went off. Not so long ago, the same company caused a stir with an unorthodox business model, under which it was decided that its 2021 slate of films for HBO Max would be released on the same day they hit US theatres, free of additional charge. The effect of this was a noticeable jolt to exhibition, funneling viewers towards the future way of consuming films: via streaming - the risky strategy didn't last long. During a press conference, Zaslav pushed the headline "We will fully embrace theatrical" as a comeback song, which signals a vague and cloudy future for HBO Max.

Exactly what happens in the aftermath of ongoing operations at one of the most prestigious powerhouses in the industry is something we will just have to wait to see.

Platforms quickly understood they couldn't afford a summer

void. As we can see from this June report, Netflix aims to fill the Studio's lack of big summer releases in cinemas with watchable action and comedy movies. The audience is predisposed towards consuming blockbusters, and Netflix understood this meant product had to be improved and adequately served up on the small screen: "Escape from Spiderhead" (11.6M streams across the markets), "Interceptor" (14M streams), and "Hustle" (12M streams) top the charts. You can expect more Adam Sandler on your Netflix feed as a result of the Happy Madison Production deal Sandler signed with the giant two years ago. For its part, Amazon lacks a rising star in original content, to lure people to the platform. The e-commerce giant might turn the tables with the upcoming release of "Rings of Powers".

**Summer is the time to stream.
Let's feed them lots of pure entertainment.**

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



SUMMER TIME BOOST FOR THE LOCAL BOX OFFICE SMASHER

BY ELENA NEIRA



Steven Spielberg's "Jaws", was the first film to turn summer into blockbuster territory. It's the time when audiences go into movie theatres to get away from the heat, and are more eager to embrace what is being served up to them (almost always out of Hollywood). Action, comedy and family contents are the fetish genres for audiences accustomed to the predominance of that kind of fare in movie theatres.

This strong seasonal trend has quickly taken root in streaming platforms as well, and platforms have turned summer into their particular circuit for testing the real level of audience connection with these types of productions: big budgets, backed by big promotion campaigns, and featuring well-known faces. Netflix's domestic blockbusters this month ("Escape from Spiderhead", "Interceptor" and "Hustle")

have attained the top positions in the top 100 most watched programmes in all countries. July will tell us whether this success path is maintained or whether, on the contrary, they simply join the list of fleeting phenomena that don't manage to stay on the list for more than a few weeks.

June was also a month for intellectual property. Content releases ("Stranger Things", "The Umbrella Academy", "Peaky Blinders"), as well as TV classics ("The Big Bang Theory", "Friends", "The Blacklist"...), recorded impressive figures thanks to their cultural importance. The difficulty for contents that are not well known or that were not heavily promoted to enter the households of platform customers stood out in sharp contrast to the ease with which family programmes or big releases could be had.

There are, though, other resources for connecting with audiences. Themes continue to be key to meaningfully connecting with audiences. "Intimidación" is a case in point. Apart from achieving extraordinary figures in Spain, it also made a significant entry into other European territories and shows just how much a universal theme can break down the geographic and linguistic borders that stem from production origin.

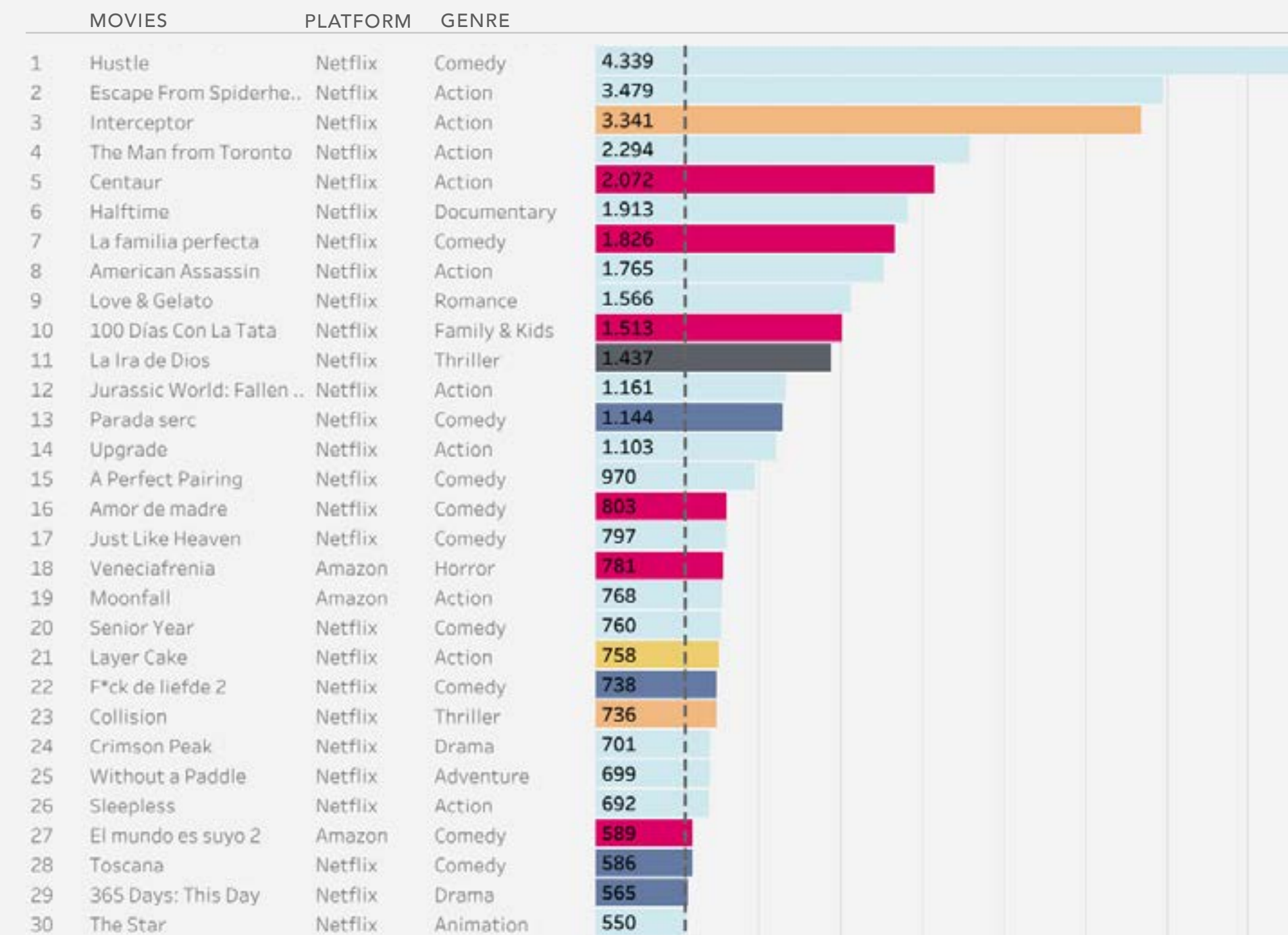
The high volume of releases and the huge catalogue of licensed content is giving rise to a very polarised consumption map, where there is a considerable distance between the top positions on the ranking list and the middle and bottom positions. Producers and distributors are still unable to find formulae to help them deal with this dramatic reality: the sustainability of a product whose release proves to be more painful than glorious.

Elena Neira

La Otra Pantalla - Guest Analyst of the Month

SPAIN 100 MOVIES | OVERVIEW

TOTAL STREAMS BY MOVIE NETFLIX - AMAZON



SHOWING 30/100 - See complete chart here

streams (.000)

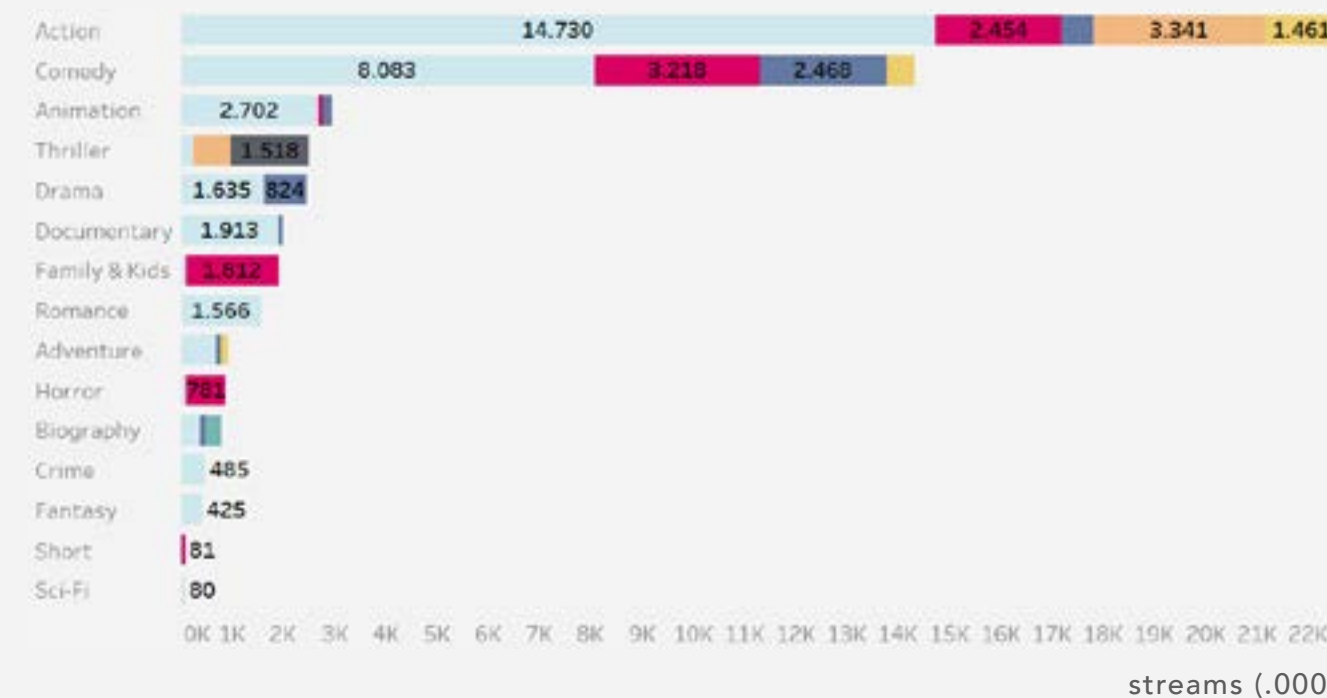
PRODUCTION COUNTRIES



CATALOG SHARE BY COUNTRY NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES NETFLIX - AMAZON



streams (.000)

SERIES, DOCUMENTARIES...AS WELL AS FILMS. BASKETBALL CONTINUES TO BE A BOUNDLESS SOURCE OF SUCCESSFUL CONTENT

The success of "Hustler" which has already garnered over 4.3M streams in Spain, also confirms how fruitful the agreement signed with Adam Sandler in 2020 is proving to be. This film, in which Sandler plays a head-hunter going through a rough patch, is way ahead of the second title in the ranking, "Escape from Spiderhead".

TOP GUN: MAVERICK MAKES THE ON-DEMAND SPECTATOR ALSO 'FEEL THE NEED' FOR ACTION CONTENT

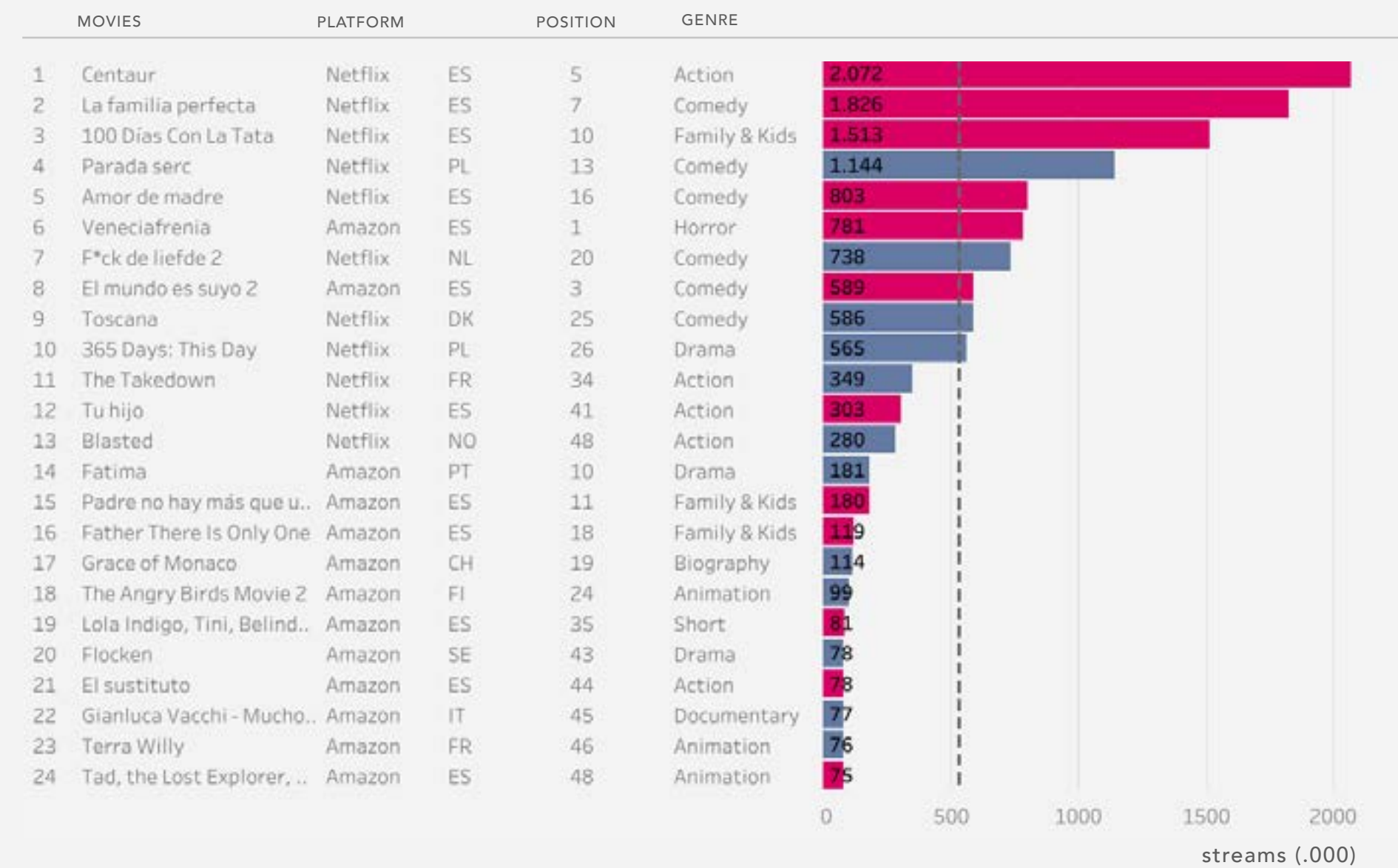
Action, one of the favourite summer genres, confirms its leadership in June. Four films hog the top 5, garnering almost 15M streams. "Centaur", Daniel Calparsoro's thriller, overtakes "Halftime", the documentary about Jennifer Lopez.

NETFLIX PERFECTS THE DOMESTIC BLOCKBUSTER

Netflix is providing households with the roadmap that the majors usually follow during the summer months. Popular genre titles (comedy and action), with deftly woven storylines, well-known faces, easy premises and important marketing campaigns. These works easily hog the top positions of the ranking, though they seldom have much life beyond the first four weeks or so of release.

SPAIN 100 MOVIES | EUROPEAN FOCUS

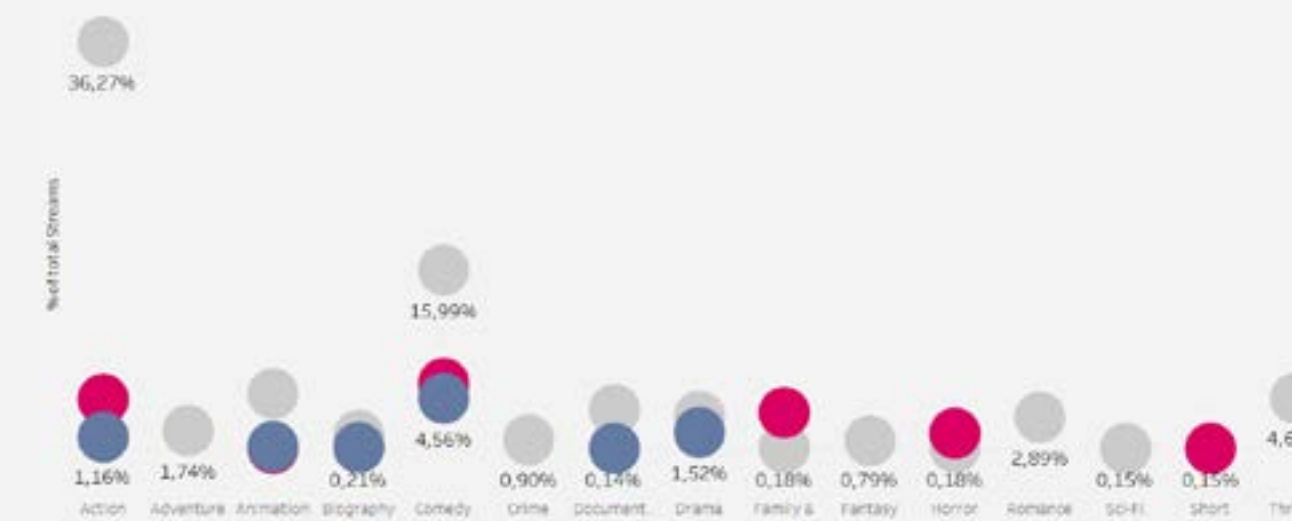
LOCAL AND EUROPEAN MOVIES IN THE TOP 100 NETFLIX - AMAZON



PRODUCTION COUNTRIES



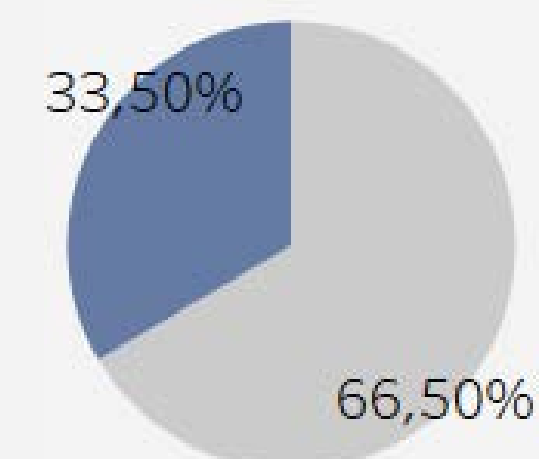
CONTRIBUTION OF LOCAL & EUROPEAN MOVIES TO TOTAL STREAMS NETFLIX - AMAZON



NUMBER OF TITLES BY GENRES NETFLIX - AMAZON

| GENRE | EU | SPAIN |
|---------------|----|-------|
| Action | 2 | 3 |
| Animation | 2 | 1 |
| Biography | 1 | |
| Comedy | 3 | 3 |
| Documentary | 1 | |
| Drama | 3 | |
| Family & Kids | | 3 |
| Horror | | 1 |
| Short | | 1 |

CONTRIBUTION TO DRAMA STREAMS



AUDIENCES WANT TO FEEL GOOD

The local production success of on-demand platforms is built around two clear trends: the search for evasion (provided by action) and feel-good content (served up by comedy). "Centaur", the feature film directed by Daniel Calparsoro, leads the local and European ranking with just over 2M streams, half of the figure for the Top Global number 1, "Hustlers".

EUROPEAN CONTENT MAKES IT INTO HOUSEHOLDS, BUT DOESN'T ACHIEVE THE POPULARITY OF LOCAL TITLES

The latter's predominance in the local content Top 100 is visibly there, though there also is very clear polarisation. The figures recorded for local and European films that are at the bottom of the Top 100 are purely testimonial.

EUROPEAN DRAMAS ACCOUNTED FOR 33.5% OF STREAMS THIS MONTH

A cume figure for many works, but no stand-out titles with hugely significant figures.

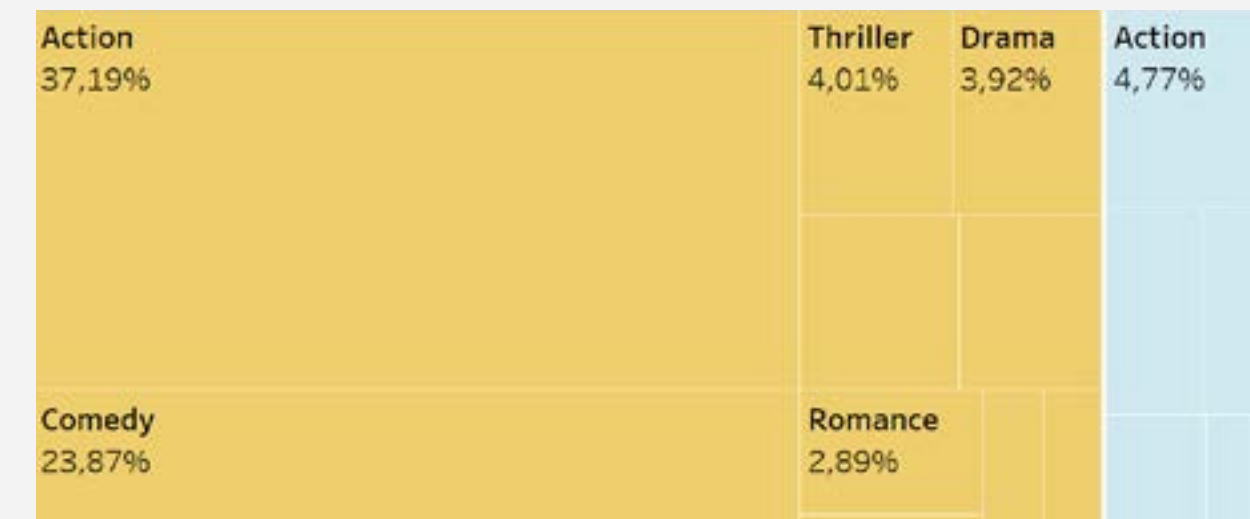
SPAIN 100 MOVIES | SVOD PLATFORMS

TOP MOVIES STREAMS BY GENRES



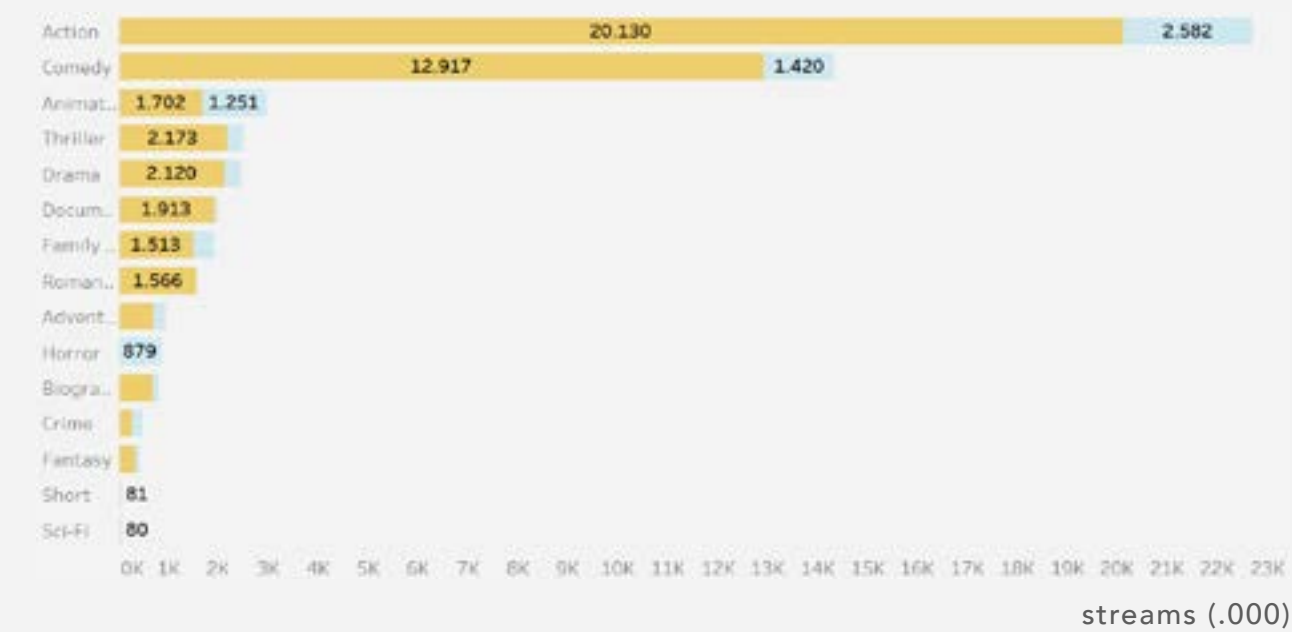
MOST WATCHED GENRES

SHARE BY PLATFORM



TOTAL STREAMS BY GENRES

PLATFORM COMPARATIVE



OTT

- Amazon
- Netflix

ACTION AND COMEDY ARE THE STELLAR GENRES ON NETFLIX THIS MONTH. THEIR 32 MILLION STREAMS REPRESENT OVER 60% OF THE TOP 100 STREAMS

Netflix rules the roost with regard to easy action in households, thanks to the decisive presence of well-known faces. Chris Hemsworth ("Thor: Love and Thunder"), Miles Teller ("Top Gun: Maverick"), Kevin Hart ("Jumanji", "Central Intelligence"), Woody Harrelson ("Natural Born Killers", "The People vs. Larry Flynt") and Elsa Pataky ("Interceptor") are the ambassadors of a genre that has brought Netflix over 20M streams.

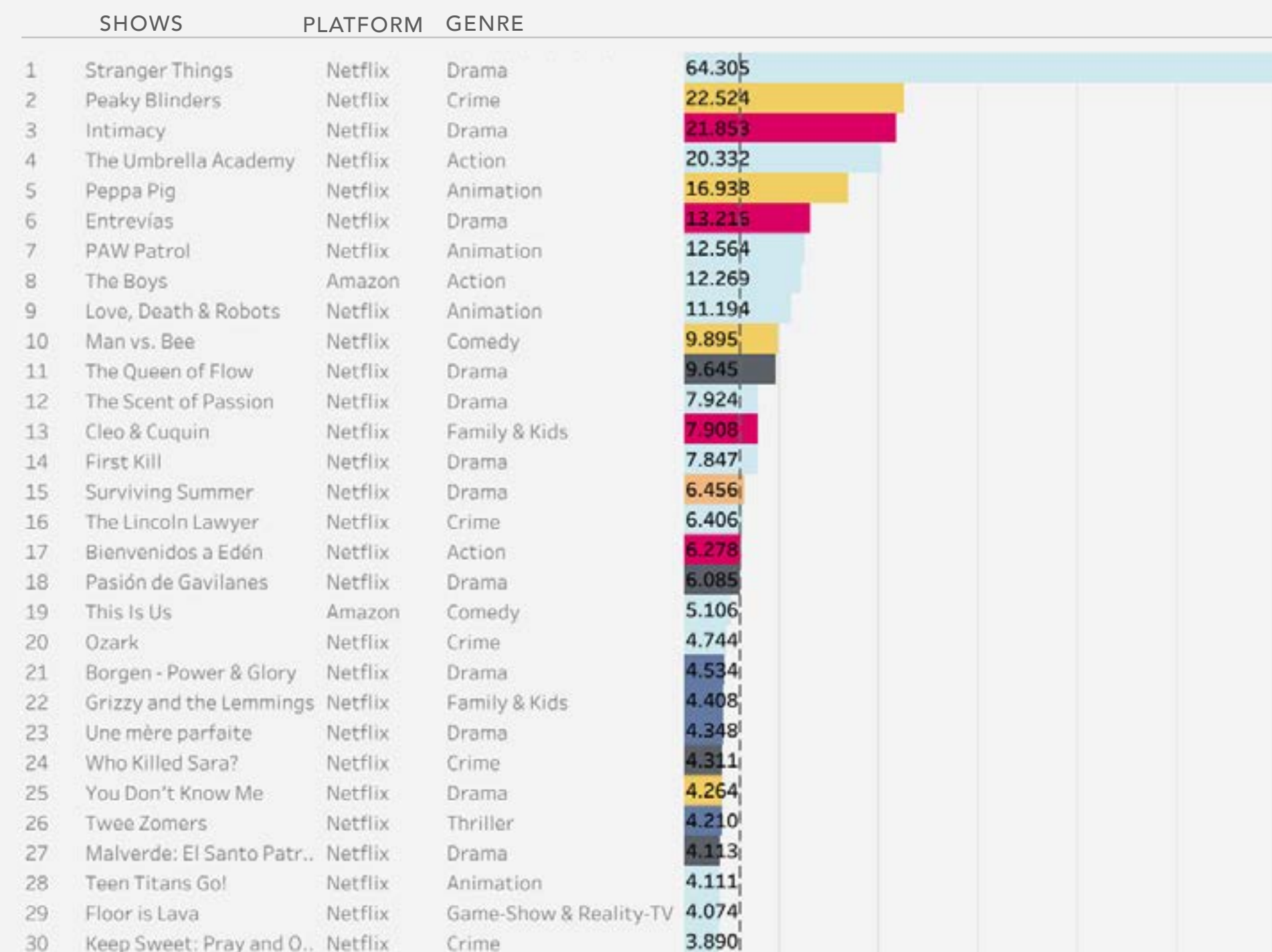
AMAZON RECORDS MODEST FIGURES, BUT BOASTS LONG LASTING SUCCESSES

"Cinderella", the real action film starring Camila Cabello that has been out for almost a year, remains in the ranking list of family content and kids movies. The continued presence of titles month after month is not usual, which is why it is becoming key to assessing effectiveness in terms of capturing and keeping viewers beyond the release month.

SPAIN 100 SHOWS | OVERVIEW

TOTAL STREAMS BY SHOW

NETFLIX - AMAZON



SHOWING 30/100 - See complete chart here

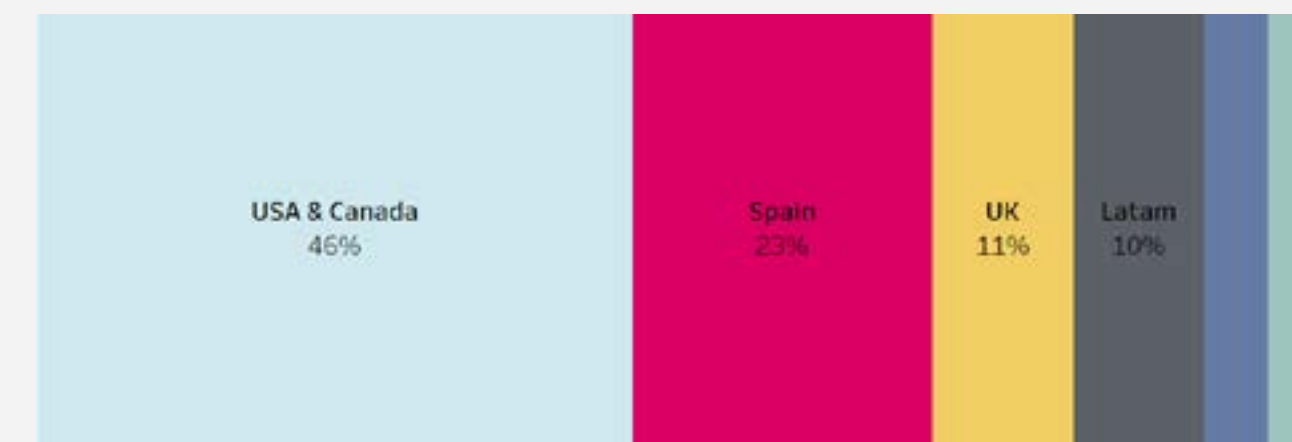
streams (.000)

PRODUCTION COUNTRIES



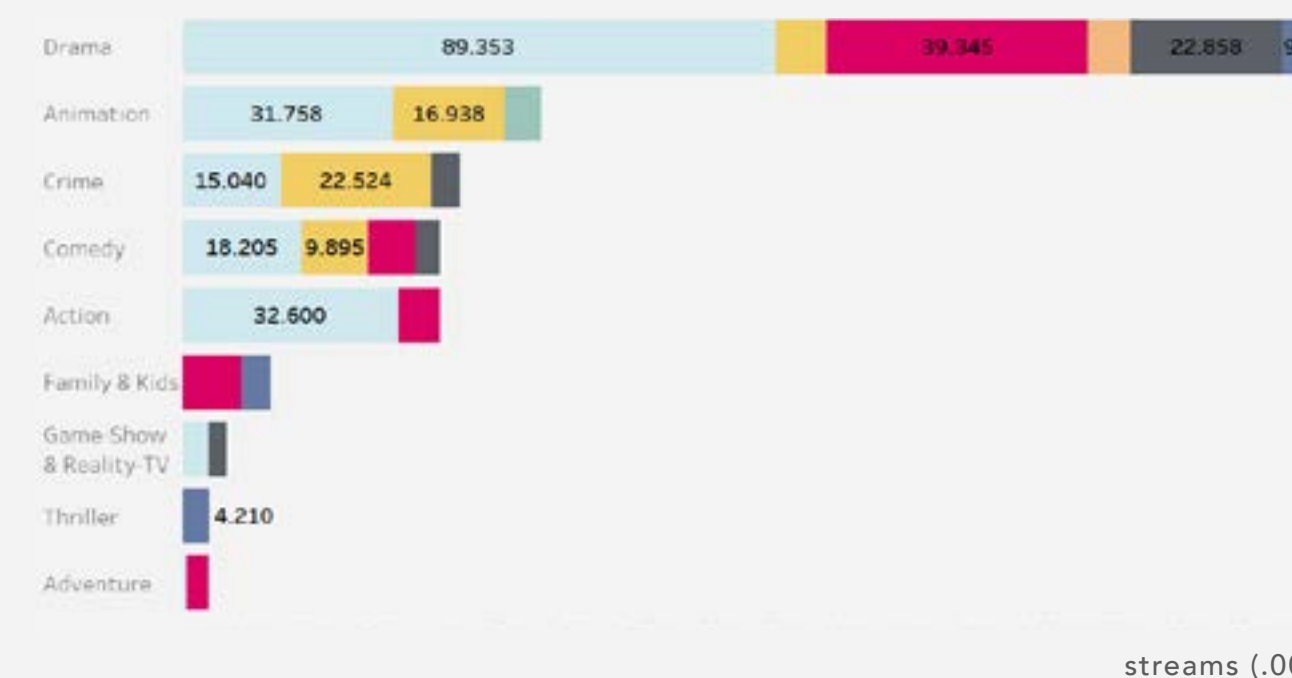
CATALOG SHARE BY COUNTRY

NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES

NETFLIX - AMAZON



streams (.000)

INTELLECTUAL PROPERTY MONTH

The Duffer brothers' series, released at the end of May, comfortably leads program rankings, tripling the figure for another eagerly awaited season return, "Peaky Blinders". "The Umbrella Academy" and "The Boys" also record interesting figures in a month in which "Stranger Things" leaves little room for the others.

SPANISH FICTION RESISTS

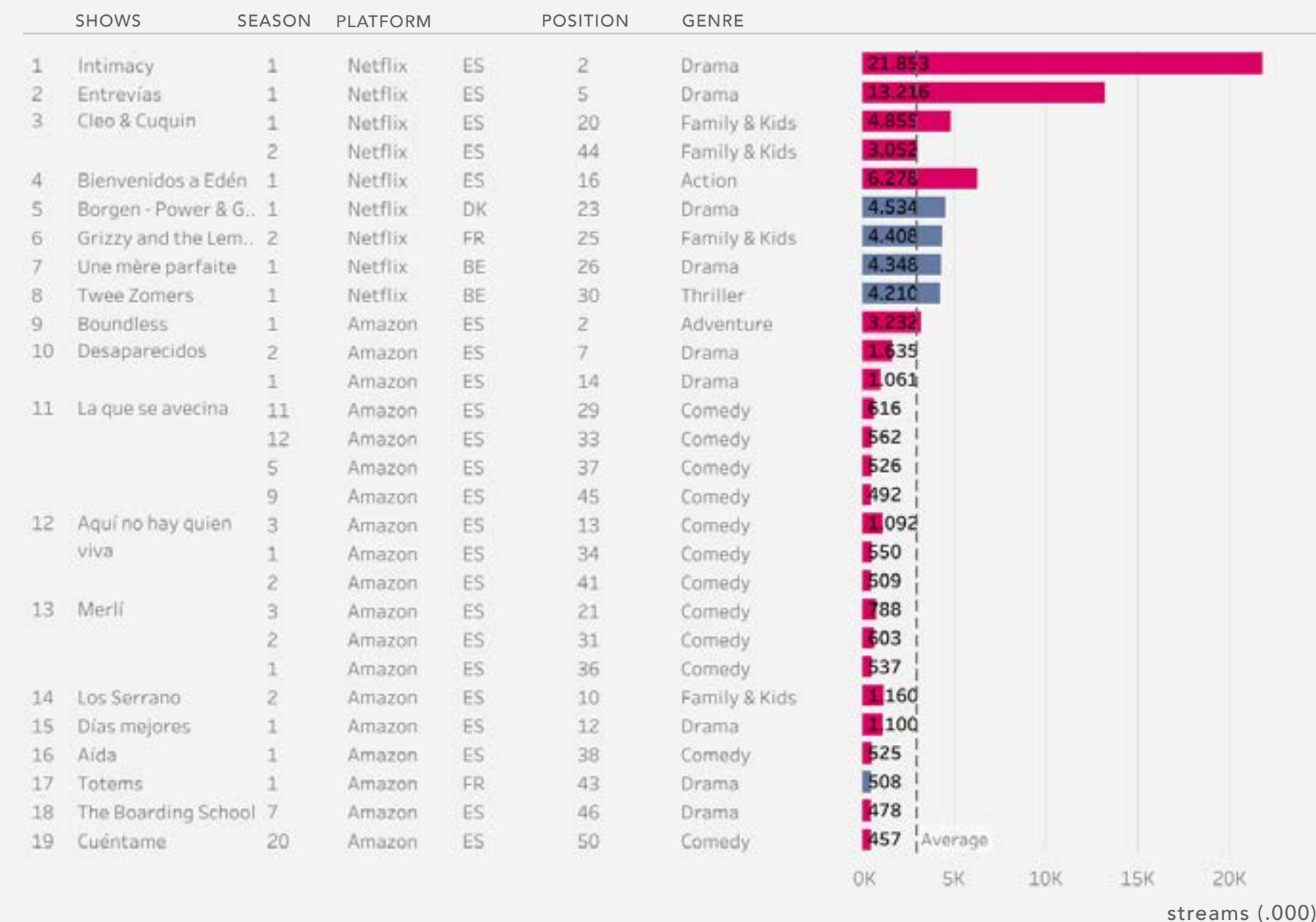
Two Spanish television dramas manage to make it into the Top 10 via two different routes. The first is "Intimidad", a fiction series starring Itziar Ituño ("Moneyheist"), whose premise (porno used as a means of vengeance and harassment), has triggered much talk and debate for weeks. The other one is "Entrevías", which remains in the ranking for another month after a successful run on Telecinco.

NORTH AMERICAN FICTION ACCOUNTS FOR CLOSE TO 50% OF SERIES CONSUMED IN OUR COUNTRY

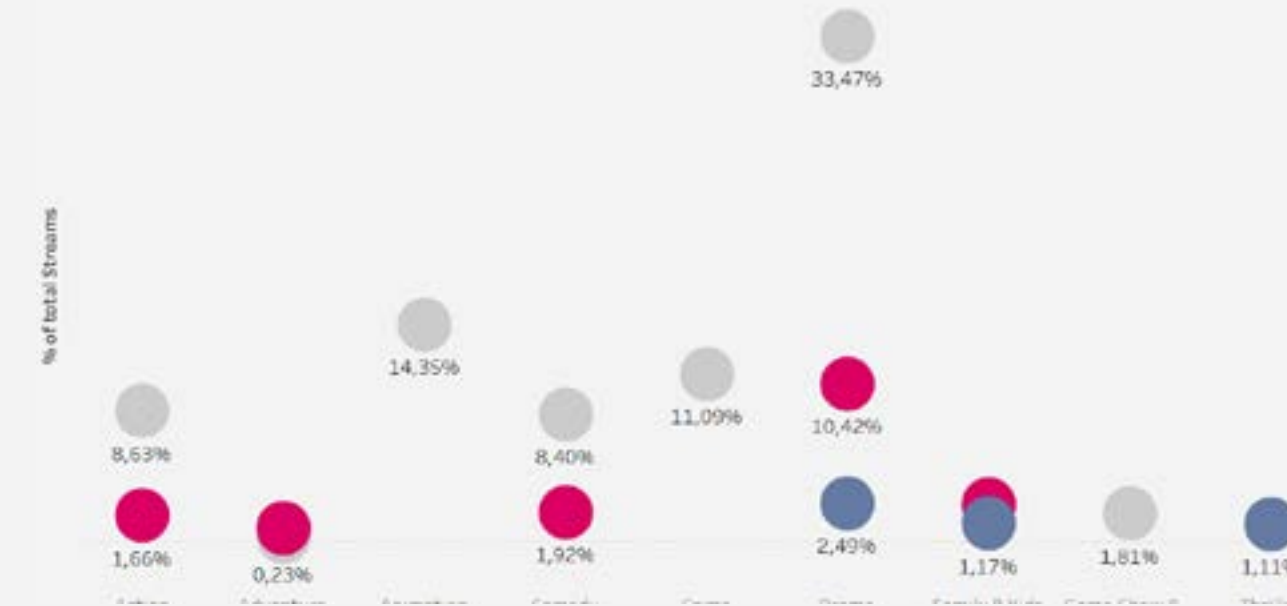
Contrary to what happens with feature films, drama is the most consolidated genre as far as television programs go, with over 89M streams.

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



PLATFORMS FOR NOVELTIES AND PLATFORMS WITH CATALOGUES

The consumption of local and European content on the part of Netflix and Amazon clients reflects two clearly distinct patterns. On Netflix, the viewing of new releases with very large figures and a short commercial life is the predominant feature. Amazon, on the other hand, doesn't show such high figures, but does manage to sneak into the top 100 catalogue classics such as "Aquí no hay quien viva", "La que se avecina", "Merlí", "Los Serrano" and "Aída".

"INTIMIDAD" AND "ENTREVÍAS", TWO DRAMAS THAT APPEAL TO AUDIENCES IN SPAIN AND OUTSIDE OF SPAIN

These two works account for a significant part of the total share of drama seen via streaming during the month of June with over 35K streams. Their presence among the Top 10 most watched programmes on Netflix in countries all over the world confirms the travelability of fiction made in Spain.

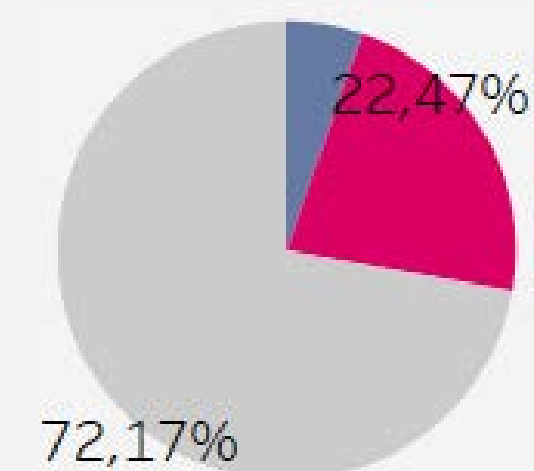
THE LUKEWARM RETURN OF BORGEN

On its return, under the Netflix Original Brand this time, "Borgen" fell a trifle short of 5M reproductions, a modest return for a Nordic fiction classic that had done so well within the Netflix catalogue that it justified purchasing the acquisition rights for the development of a new season.

NUMBER OF TITLES BY GENRES NETFLIX - AMAZON

| GENRE | EU | SPAIN |
|---------------|----|-------|
| Action | | 1 |
| Adventure | | 1 |
| Comedy | | 5 |
| Drama | 3 | 5 |
| Family & Kids | 1 | 2 |
| Thriller | 1 | |

CONTRIBUTION TO DRAMA STREAMS



PRODUCTION COUNTRIES

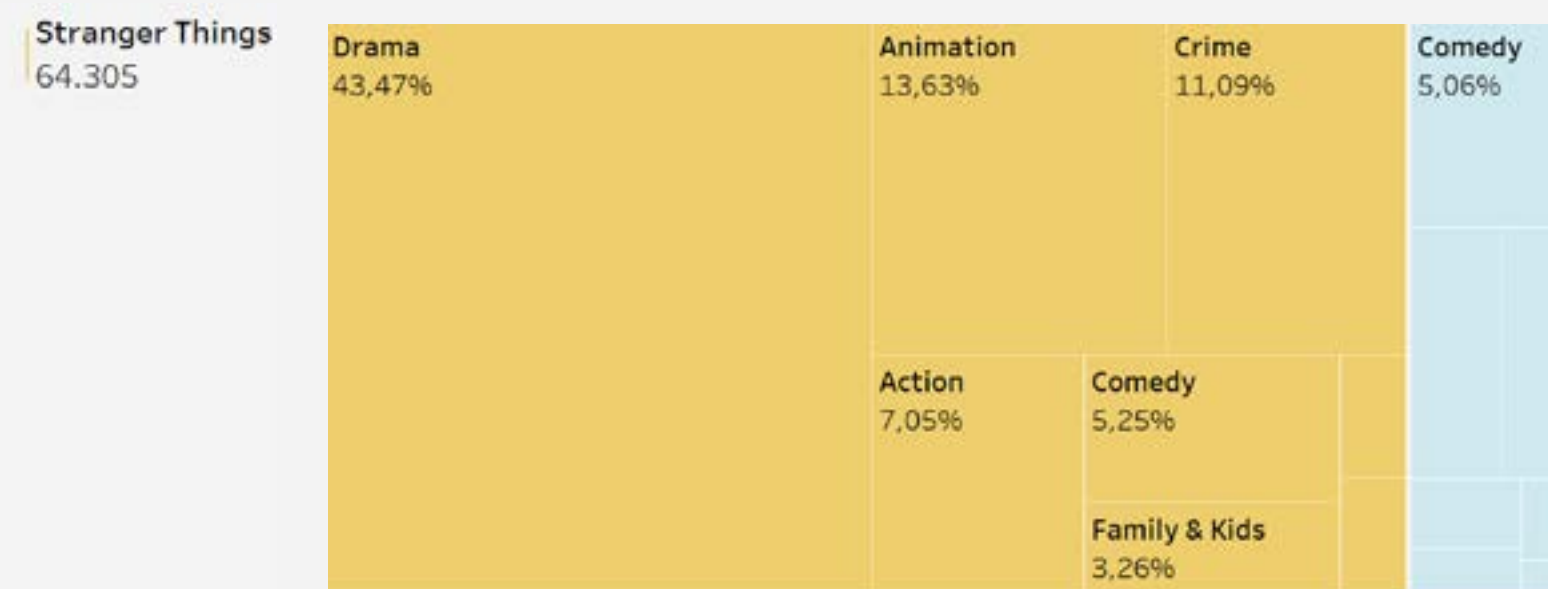
- Europe
- Spain
- Others

SPAIN 100 SHOWS | SVOD PLATFORMS

TOP SHOWS STREAMS BY GENRES



MOST WATCHED GENRES SHARE BY PLATFORM



NETFLIX: HOUSE OF DRAMA

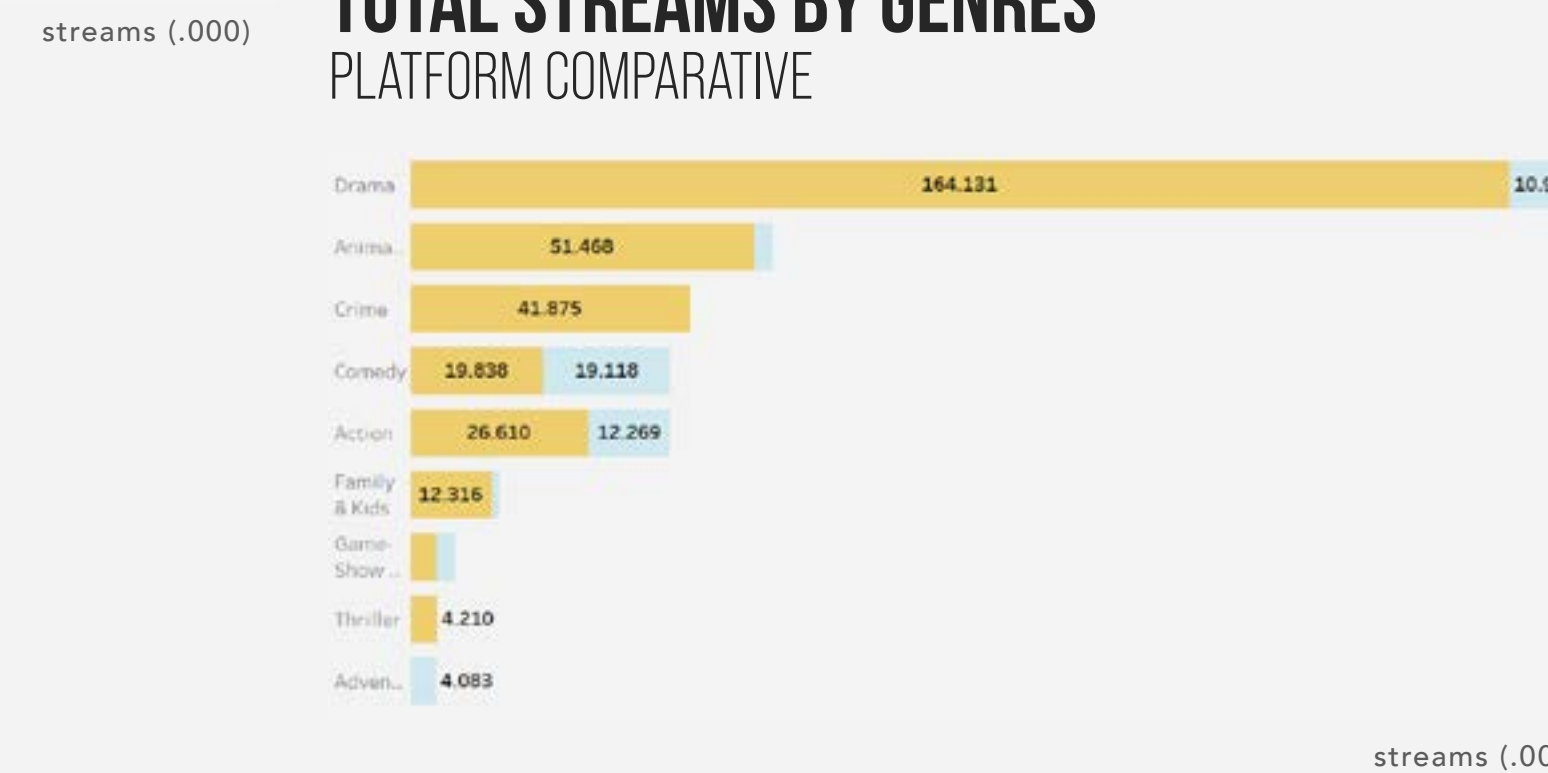
With almost 165M streams, Netflix is once again crowned king of drama for Spanish audiences. "Stranger Things", with its exceedingly long episodes, greatly contributed to the significant increase in the number of reproductions.

Action, omnipresent in Netflix's film projects, fell into fourth position as far as preferences in the world of television programmes go. It was taken over by animation and thriller, with 51.4M and 41.8M streams respectively.

AMAZON PUTS UP A FIGHT WITH THE RODRIGO SANTORO-ALVARO MORTE TANDEM

Amazon is a case of moderate success in the history and adventure genre. "Limitless" follows in the vein of other Prime Originals such as "El Cid: una historia inspirada en hechos reales" (the first voyage around the world by Juan Sebastián Elcano and Fernando de Magallanes) with two well-known faces, Rodrigo Santoro ("Westworld") and Álvaro Morte ("Moneyheist"). The results, though modest, (just over 3M streams), are the most significant in this genre for the month of June.

TOTAL STREAMS BY GENRES PLATFORM COMPARATIVE



OTT

- Amazon
- Netflix

HOT CONTENT IN SPAIN

“INTIMIDAD”: A GLOCAL MULTI-LINGUAL PRODUCT WITH A WELL-KNOWN FACE AND A UNIVERSAL STORY

This 8-episode miniseries, written by Veronica Fernandez and Laura Sarmiento, and produced by Txintura Films, is one of the products that travelled best to other territories during the month of June.

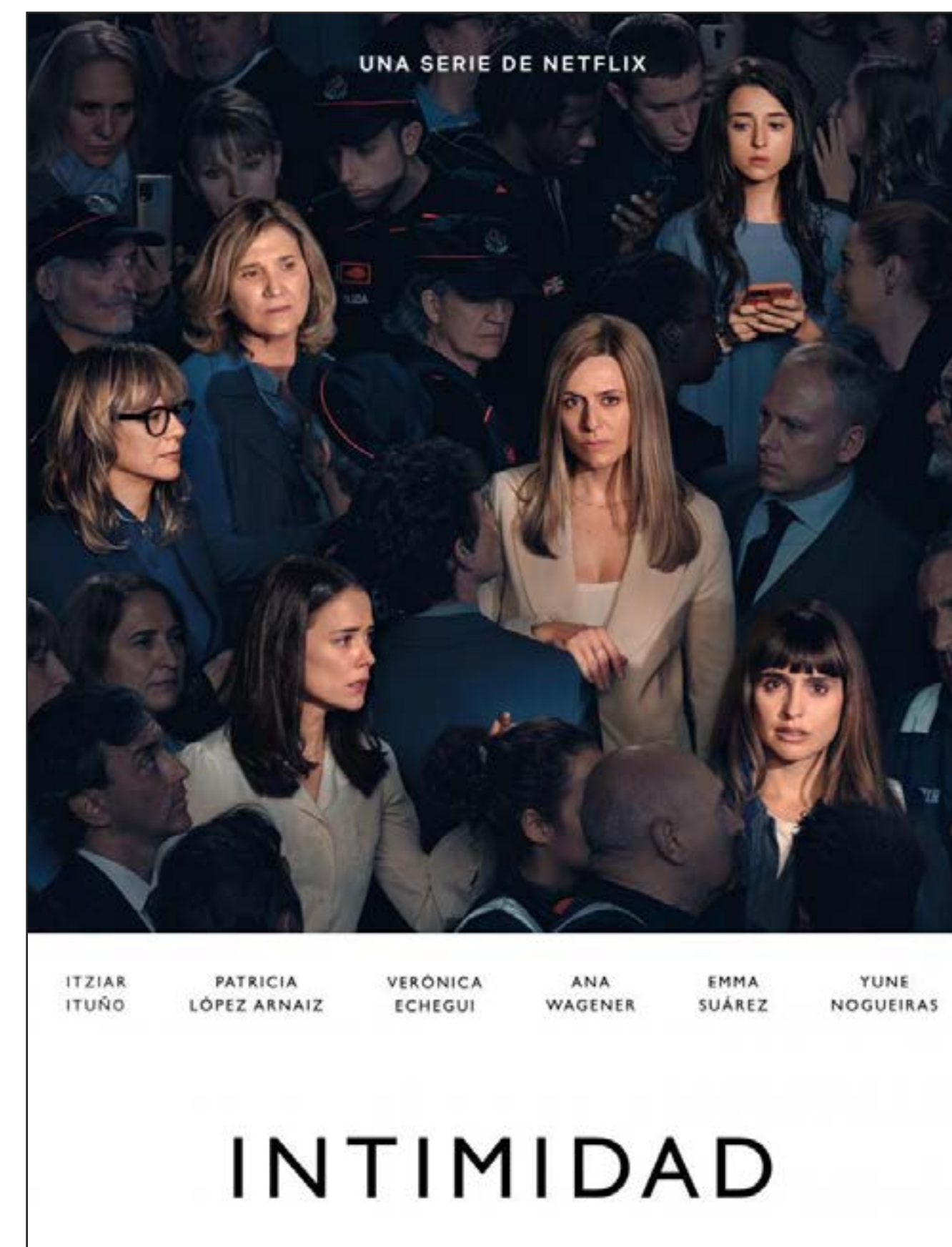
“Intimidad” has a predominantly female cast, with Itziar Ituño as lead. The fact that the main character is also one of the actresses from “Moneyheist” no doubt served to spur further audience interest but, in the final analysis, the universal elements at its core were undeniably key to securing a very good position in an environment of competition that was not at all favourable, even in countries like Germany, so difficult for non-Anglo-Saxon content.

The series begins with the leaking to the press of a sex video of a female Basque politician with a promising future, which endangers not only her political career, but her family life. The consequences of this and of another leaked video, of a woman who works in a company, unmasks a whole network of toxic masculinity and patriarchal structures that throws into sharp focus the delicate line between one’s public life and what belongs to the domain of strict privacy.

A series which opens up further debate on issues much talked about these days: the limits with regard to our intimacy, how the exposure of our privacy impacts on our mental health, the limitations of the system for the protection of victims and the double standards women have to deal with in many areas.

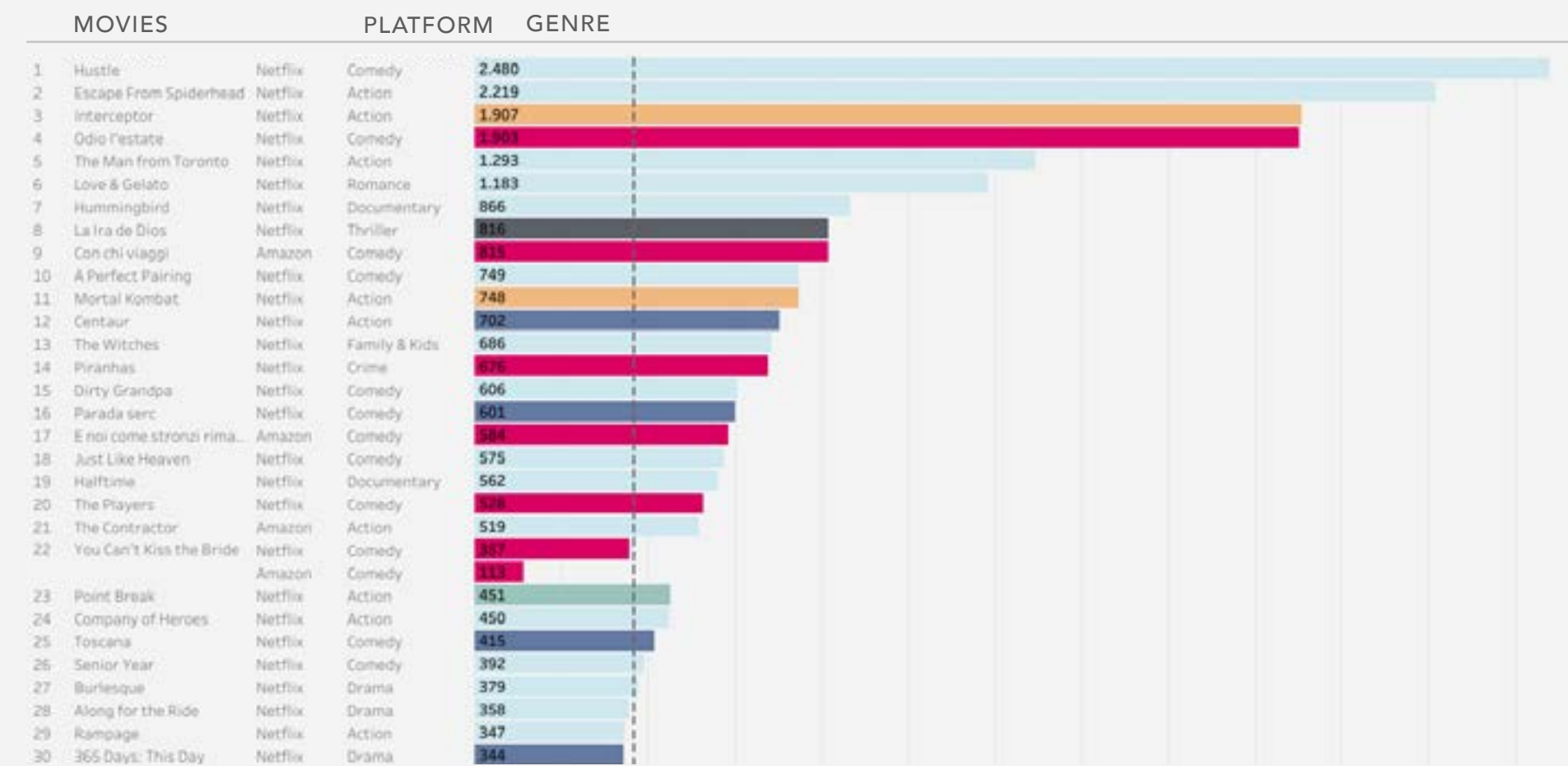
The success of “Intimidad” no doubt hinges on what it brings to this debate. The series quickly rose into the Top 10 of the most watched TV series, according to the Netflix Top 10 registry, and received wide media echo in different countries.

“Intimidad” can also be pointed to as a telling case study. Apart from Spanish, another co-official language of the Spanish State is woven into the fabric as the vehicular language. The linguistic question is going to become an essential element within certain territories of the Spanish State after the passing of the New General Audio-visual Law and in light of the plurilingual production quotas established by that law.



ITALY 100 MOVIES | OVERVIEW

TOTAL STREAMS BY MOVIE NETFLIX - AMAZON



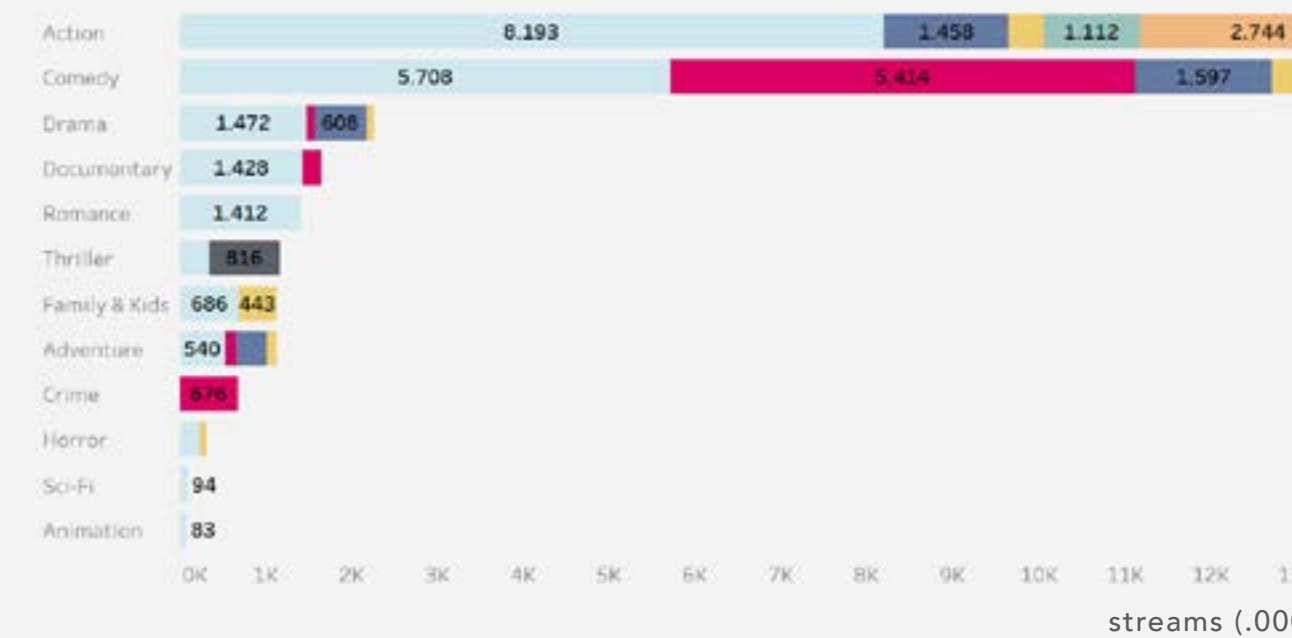
SHOWING 30/100 - See complete chart here

streams (.000)

CATALOG SHARE BY COUNTRY NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES NETFLIX - AMAZON



streams (.000)

PRODUCTION COUNTRIES



ACTION AND COMEDY RULE THE ROOST IN THE TOP 5

Netflix's clear bets for the month of June ("Hustle" and "Escape from Spiderhead") recorded the greatest number of streams, although out and out leadership went to one of the country's favourite genres – comedy; in this case a comedy starring Adam Sandler.

NORTHAMERICAN PRODUCTION HAS THE BIGGEST FIGURES

The share taken by North American productions increases with respect to May, reaching 50% of the top 100 releases. Something that is not usual in Italy. Action and comedy are clearly positioned as the favourite genres, with 25M streams in the month of June. The distance, with regard to others - drama, documentary, romance or thriller - is considerable.

NON-ANGLO-SAXON CONTENT IS VERY COMPETITIVE IN JUNE, BOASTING A VARIETY OF THEMES AND ORIGINS

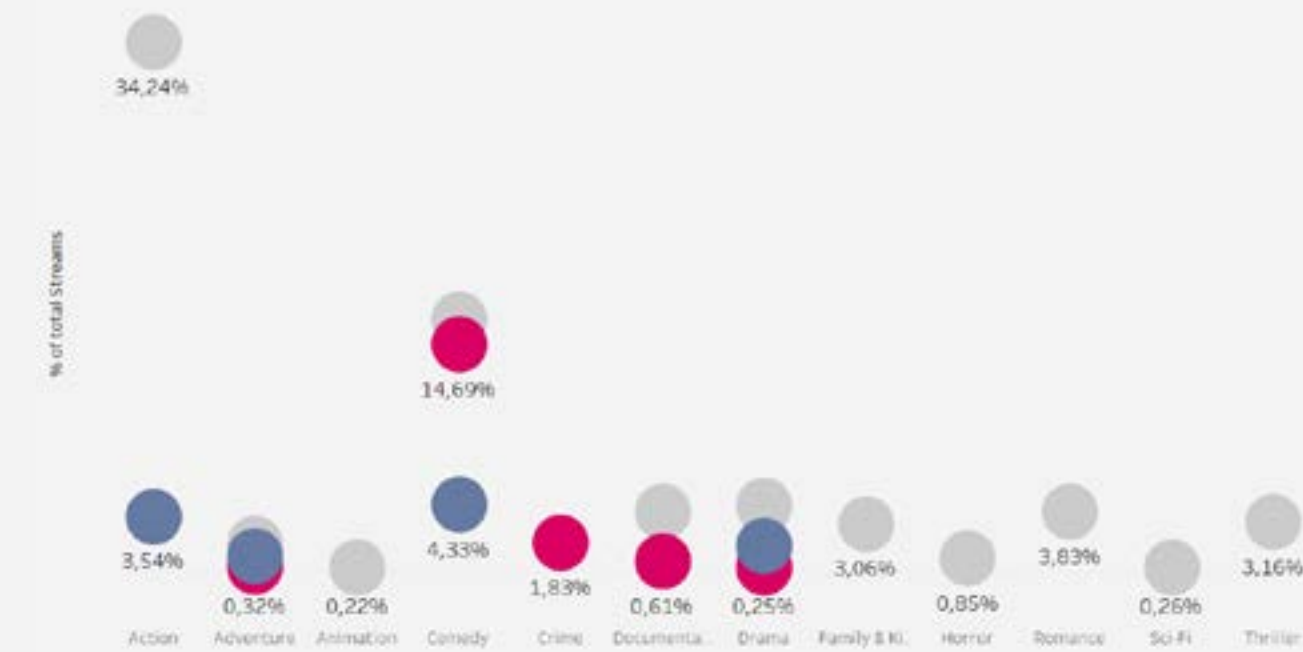
"Odio L'estate" achieves a solid fourth position in the top 100 most watched films, practically equalling the figures for the Australian work, "Interceptor". It is not alone. Four other Italian productions, two European productions and one Argentinean production, make up the most plural Top 20 of the analysed territories in Think Data, considerably improving on the figures for the month of May.

ITALY 100 MOVIES | EUROPEAN FOCUS

LOCAL AND EUROPEAN MOVIES IN THE TOP 100 NETFLIX - AMAZON



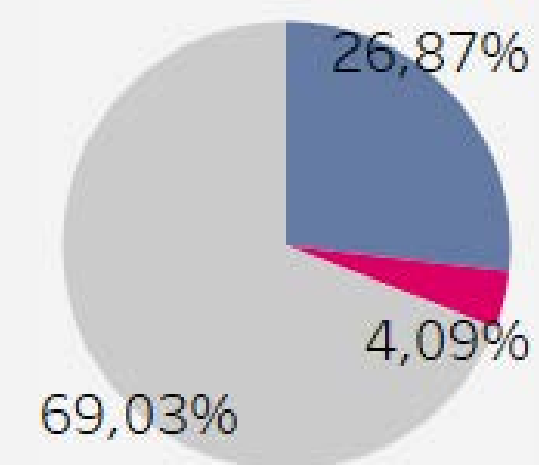
CONTRIBUTION OF LOCAL & EUROPEAN MOVIES TO TOTAL STREAMS NETFLIX - AMAZON



NUMBER OF TITLES BY GENRES NETFLIX - AMAZON

| GENRE | EU | ITALY |
|-------------|----|-------|
| Action | 4 | |
| Adventure | 2 | 1 |
| Comedy | 4 | 13 |
| Crime | | 1 |
| Documentary | | 1 |
| Drama | 2 | 1 |

CONTRIBUTION TO DRAMA STREAMS



PRODUCTION COUNTRIES



“ODIO L’ESTATE”, FROM A HIT IN MOVIE THEATRES TO A HIT ON NETFLIX

After great box office success just prior to the pandemic, Massimo Venir’s film comfortably dominates the ranking of local and European productions. Another 12 comedies, Italian as well, have thrilled local audiences, though the figures are not as good. Only four muster over 500K streams.

SPANISH FILM “CENTAURO” AND POLAND’S “PARADA SERC” AT THE TOP OF THE LIST OF THE MOST WATCHED EUROPEAN TITLES IN ITALY

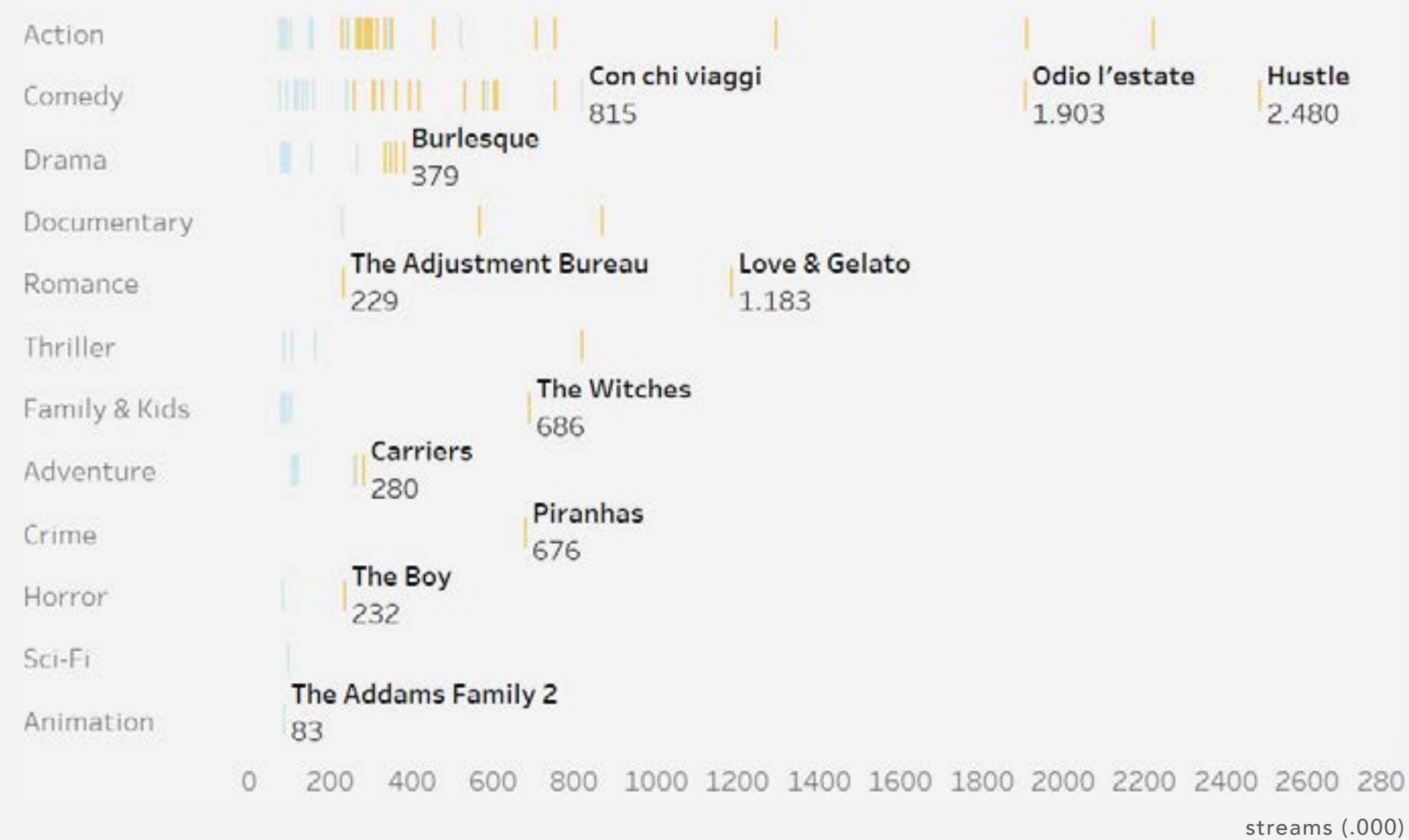
The sequel of 365 falls to third position after leading the ranking during the month of May. In general, European and local production offered greater genre diversity in the ranking of the most watched programmes, especially in action, adventure and drama.

AMAZON PLACES THE ADAPTATION OF SPANISH WORK “CON QUIEN VIAJAS” IN SECOND POSITION AMONG THE MOST WATCHED LOCAL PRODUCTIONS IN ITALY

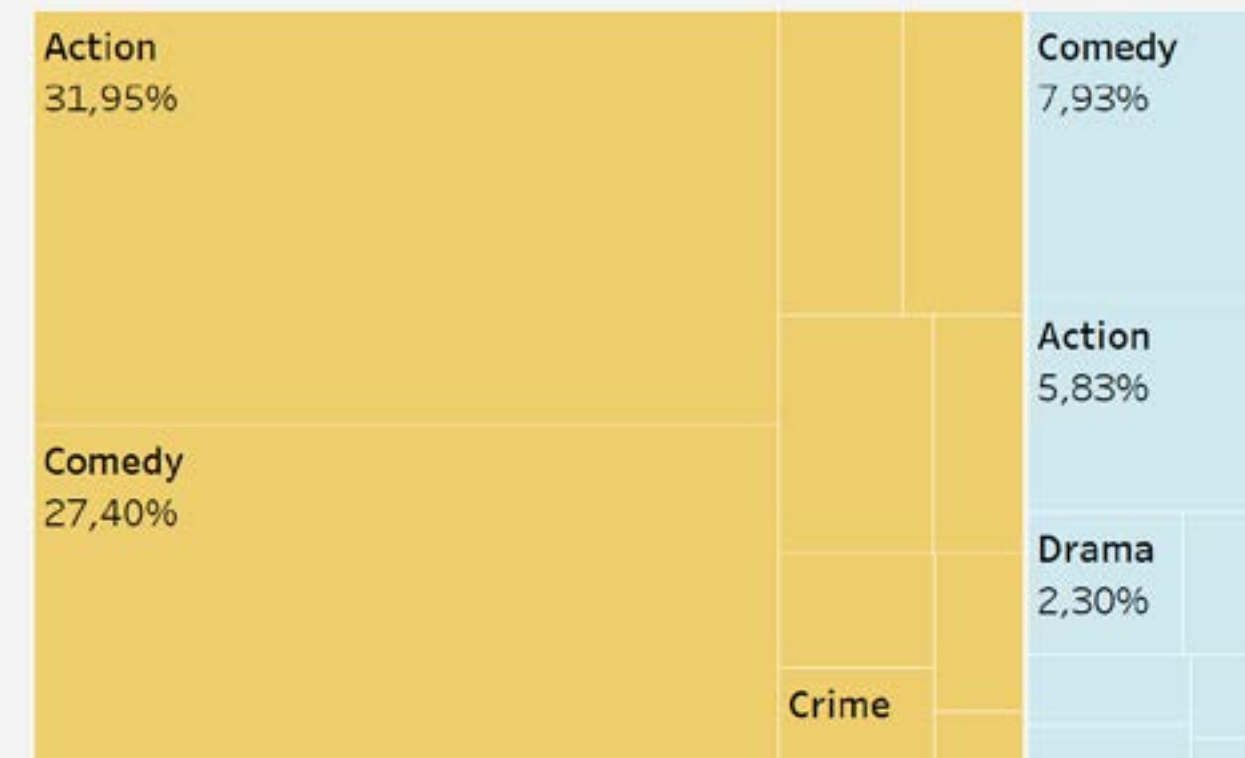
After a fleeting passage through movie theatres, the film becomes one of Prime Video’s best debuts in the country, although at some distance from the unquestionable leader, “Odio L’Estate”.

ITALY 100 MOVIES | SVOD PLATFORMS

TOP MOVIES STREAMS BY GENRES



MOST WATCHED GENRES SHARE BY PLATFORM



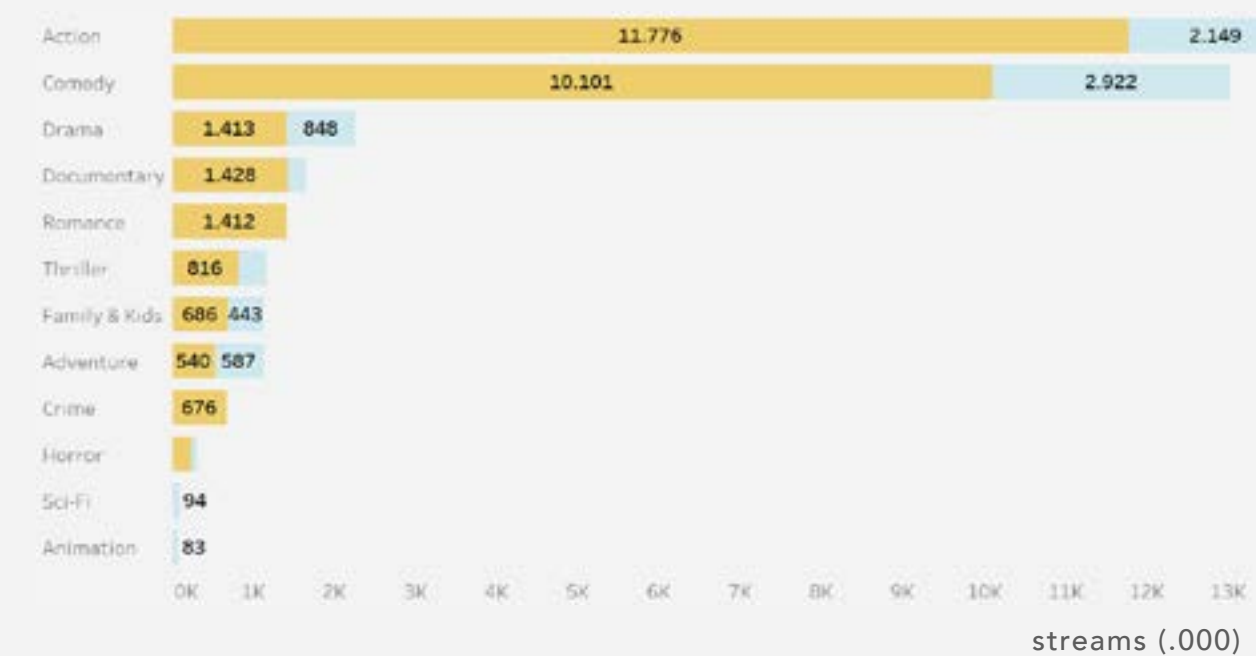
ACTION AND COMEDY ON NETFLIX ACCOUNT FOR OVER 50% OF THE TOP 100 FILMS IN ITALY, BACKING OTHER GENRES INTO A CORNER

As was the case in May, the contribution of other categories is significantly lower. The most watched titles in drama ("365 Days: This Day"), adventure ("The Wolf and The lion") and horror ("The Boy") don't exceed 350K streams.

COMEDY GAINS GROUND ON ALL PLATFORMS

Netflix's and Amazon's contribution to the comedy genre together accounts for 13.2M streams in June, although the former contributes three times more to the total figure. Prime Video, in spite of its robust catalogue, doesn't manage to make its way into Italian households at anywhere near the levels attained by Netflix.

TOTAL STREAMS BY GENRES PLATFORM COMPARATIVE

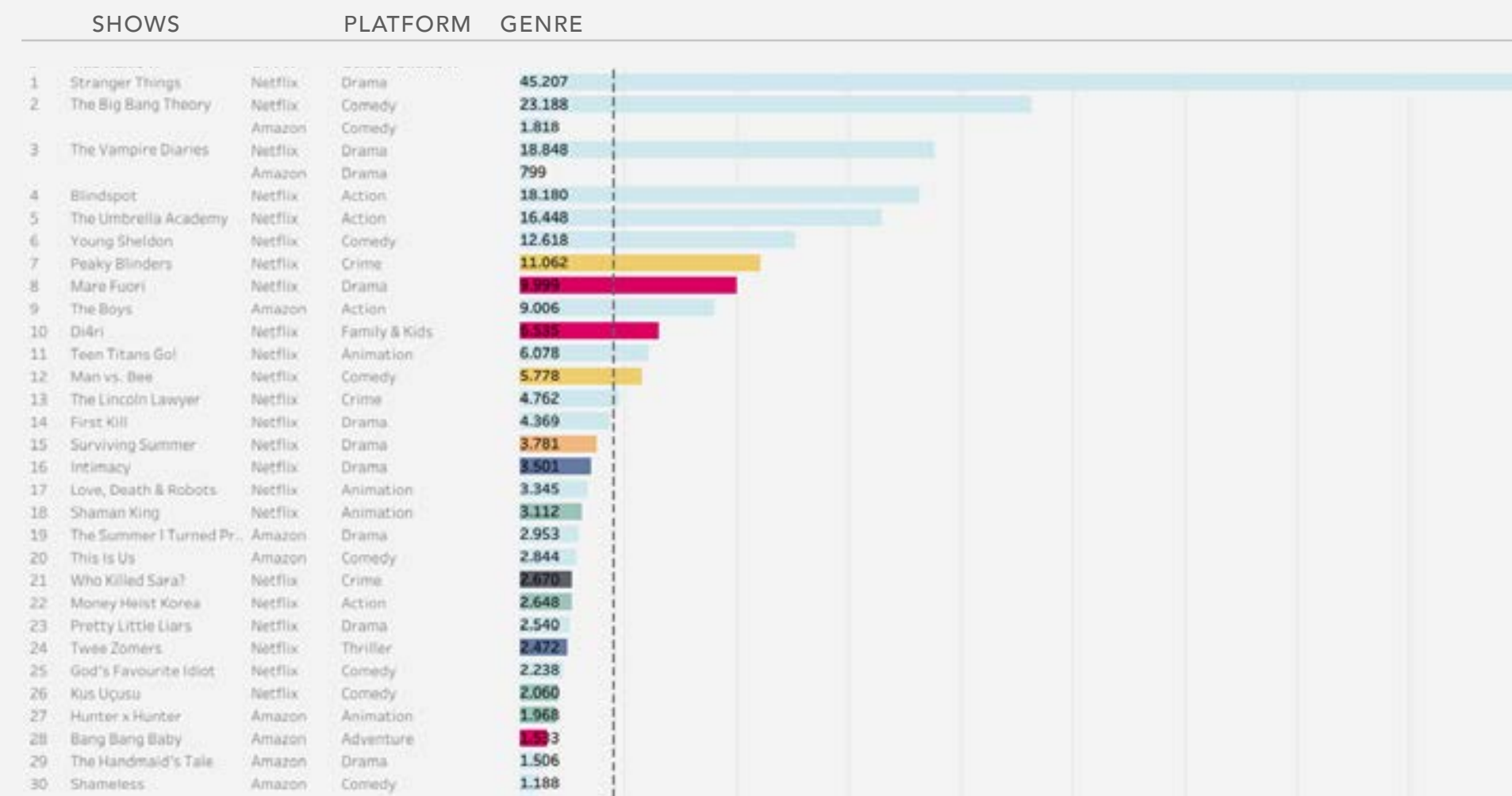


OTT

- Amazon
- Netflix

ITALY 100 SHOWS | OVERVIEW

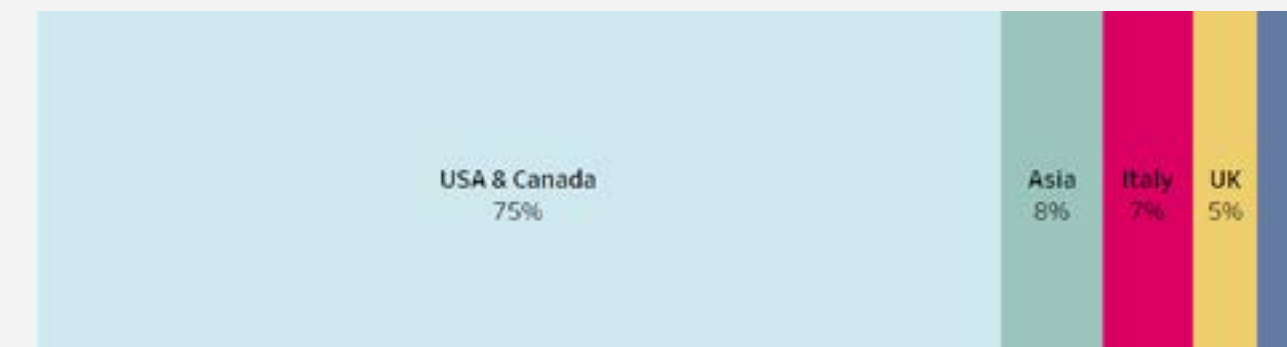
TOTAL STREAMS BY SHOW NETFLIX - AMAZON



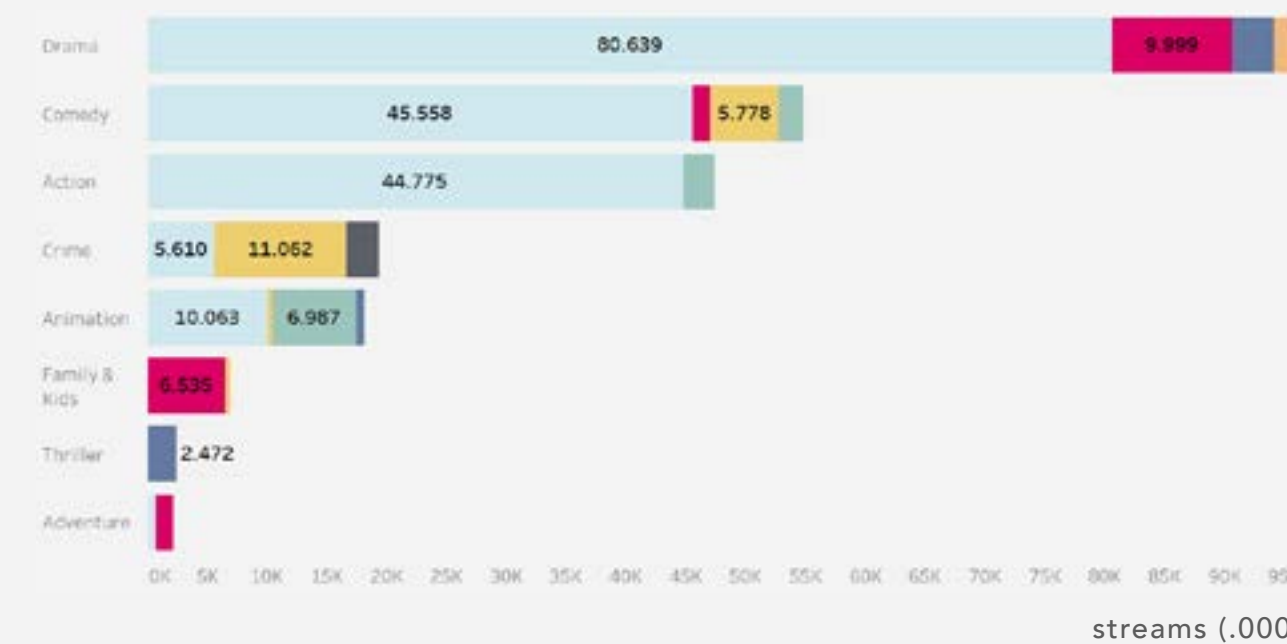
SHOWING 30/100 - See complete chart here

streams (.000)

CATALOG SHARE BY COUNTRY NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES NETFLIX - AMAZON



streams (.000)

NORTH AMERICAN TV SERIES, NEWLY RELEASED AS WELL AS LICENSED, LEAVE LITTLE ROOM FOR LOCAL CONTENT

With 75% of the quota of the 100 most watched programmes, North American series become the favourites of Italian audiences. In spite of the shot in the arm provided by the big Netflix releases of the month (the release of the new seasons of "Stranger Things" and "The Umbrella Academy"), it is sitcoms and third party licensed product that largely account for US and Canadian productions being the most watched fare this month.

DRAMA FINDS IN TV SERIES THE PUBLIC THAT SEEMS TO IGNORE THIS GENRE WHEN IT DECIDES TO WATCH FILMS

Over 80M streams in June were dramas, which practically doubles the two figures achieved by the genres that come after it in terms of volume: comedy (over 45M streams) and action (45M streams).

PALTRY PRESENCE OF NON-NORTH AMERICAN CONTENT IN THE GENERAL RANKING

Only six titles manage to sneak into the general ranking: British productions "Peaky Blinders" (#7), "Man vs Bee" (#12) and "Surviving Summer" (#15), Italian productions "Mare Fuori" (#8) and Di!ri (#10), and the Spanish production "Intimidat" (#16).

PRODUCTION COUNTRIES



ITALY 100 SHOWS | EUROPEAN FOCUS

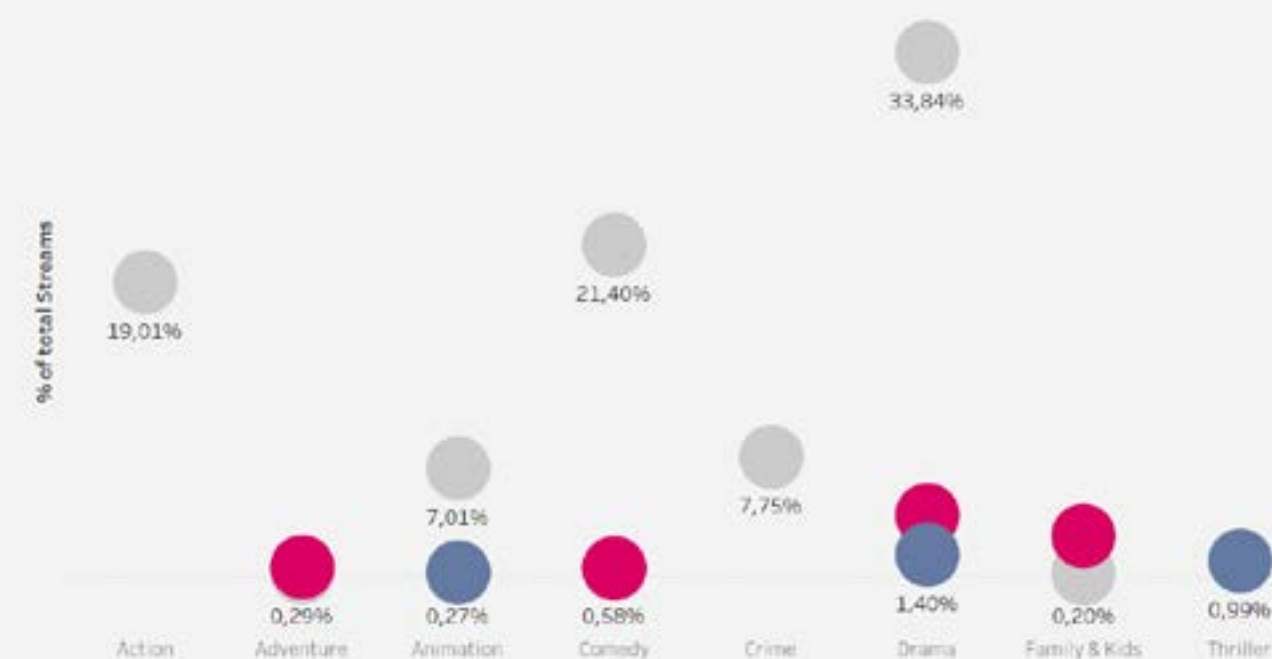
LOCAL AND EUROPEAN SHOWS IN THE TOP 100

NETFLIX - AMAZON

| SHOWS | SEASON | PLATFORM | RANK | GENRE | STREAMS |
|---------------------------|--------|----------|------|---------------|---------|
| Mare Fuori | 2 | Netflix | 18 | Drama | 3.739 |
| | 1 | Netflix | 8 | Drama | 6.261 |
| Di4ri | 1 | Netflix | 7 | Family & Kids | 6.535 |
| Intimacy | 1 | Netflix | 19 | Drama | 3.501 |
| Twee Zomers | 1 | Netflix | 41 | Thriller | 2.472 |
| Bang Bang Baby | 1 | Amazon | 4 | Adventure | 1.533 |
| Camera Café | 4 | Amazon | 46 | Comedy | 56 |
| | 3 | Amazon | 15 | Comedy | 66 |
| Barbapapa | 1 | Amazon | 14 | Animation | 66 |
| LOL: Last One Laughing .. | 2 | Amazon | 30 | Comedy | 443 |

CONTRIBUTION OF LOCAL & EUROPEAN SHOWS TO TOTAL STREAMS

NETFLIX - AMAZON



VIS-À-VIS OTHER GENRES, LOCAL DRAMA PRODUCTION MAKES THE MOST CONSIDERABLE CONTRIBUTION TO THE TOTAL CONSUMPTION OF TELEVISION PROGRAMMES THROUGHOUT THE MONTH

The figures for the Italian productions "Mare Fuori" and "Di4ri", and Spanish production "Intimidad", are interesting, especially in light of the stiff competition they had to face in the same sphere during the month of June.

AMAZON PLACES TWO ITALIAN FORMATS (FICTION AND NON-FICTION) IN THE RANKING OF MOST WATCHED LOCAL CONTENTS

The two products in question are "Camera Café" and "LOL", though their presence is but testimonial. Television comedy doesn't manage to find a faithful Italian audience in the same way that comedy does when it comes to cinema.

PRODUCTION COUNTRIES

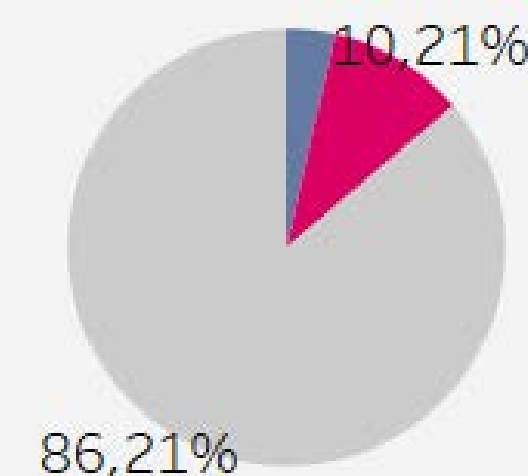
- Europe
- Italy
- Others

NUMBER OF TITLES BY GENRES

NETFLIX - AMAZON

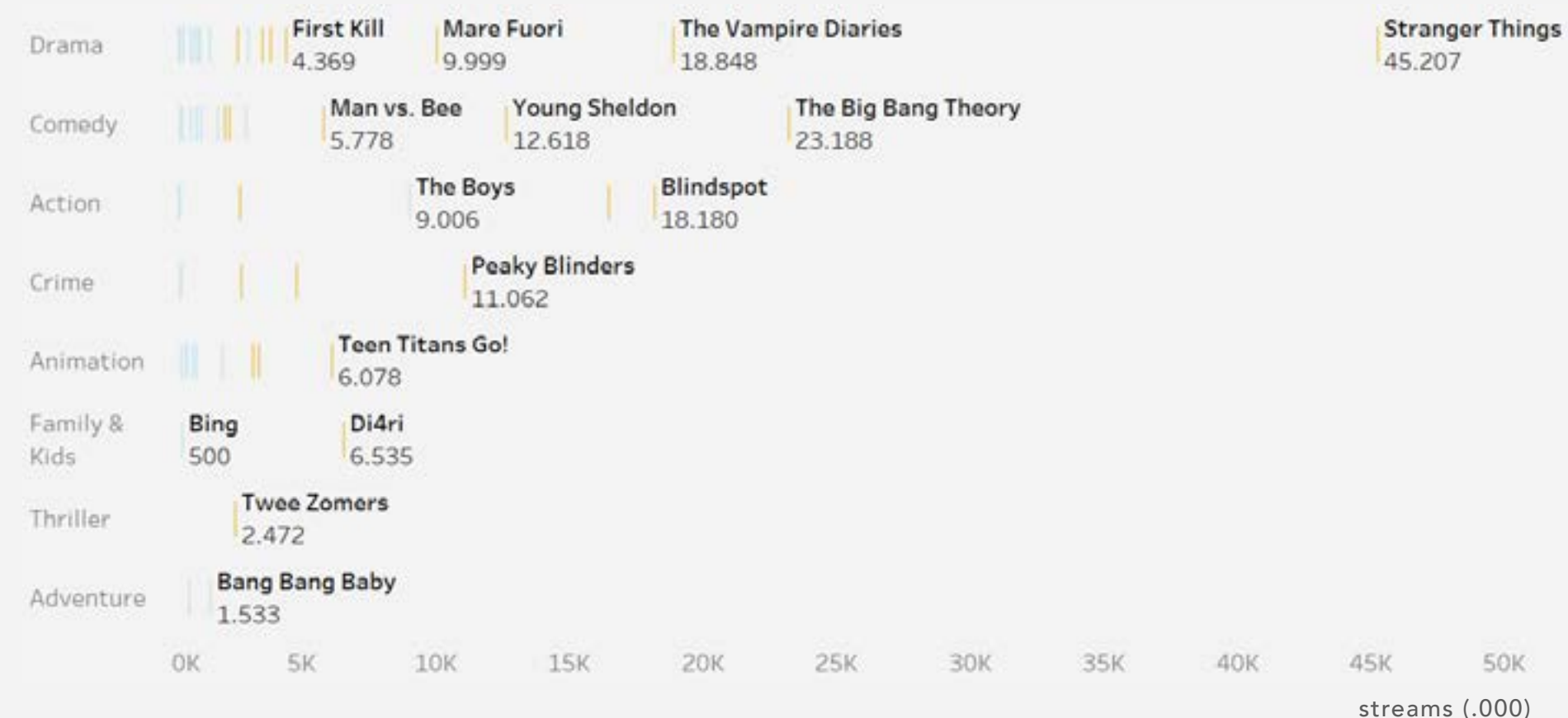
| GENRE | EU | IT |
|---------------|----|----|
| Adventure | | 1 |
| Animation | 1 | |
| Comedy | | 2 |
| Drama | 1 | 1 |
| Family & Kids | | 1 |
| Thriller | 1 | |

CONTRIBUTION TO DRAMA STREAMS

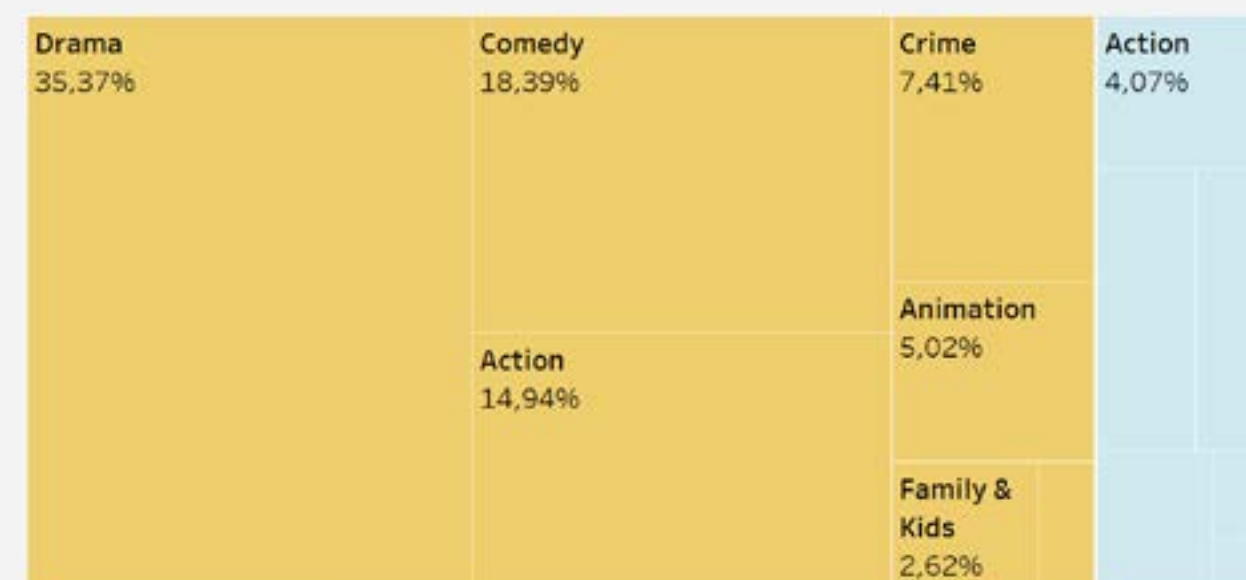


ITALY 100 SHOWS | SVOD PLATFORMS

TOP SHOWS STREAMS BY GENRES



MOST WATCHED GENRES SHARE BY PLATFORM



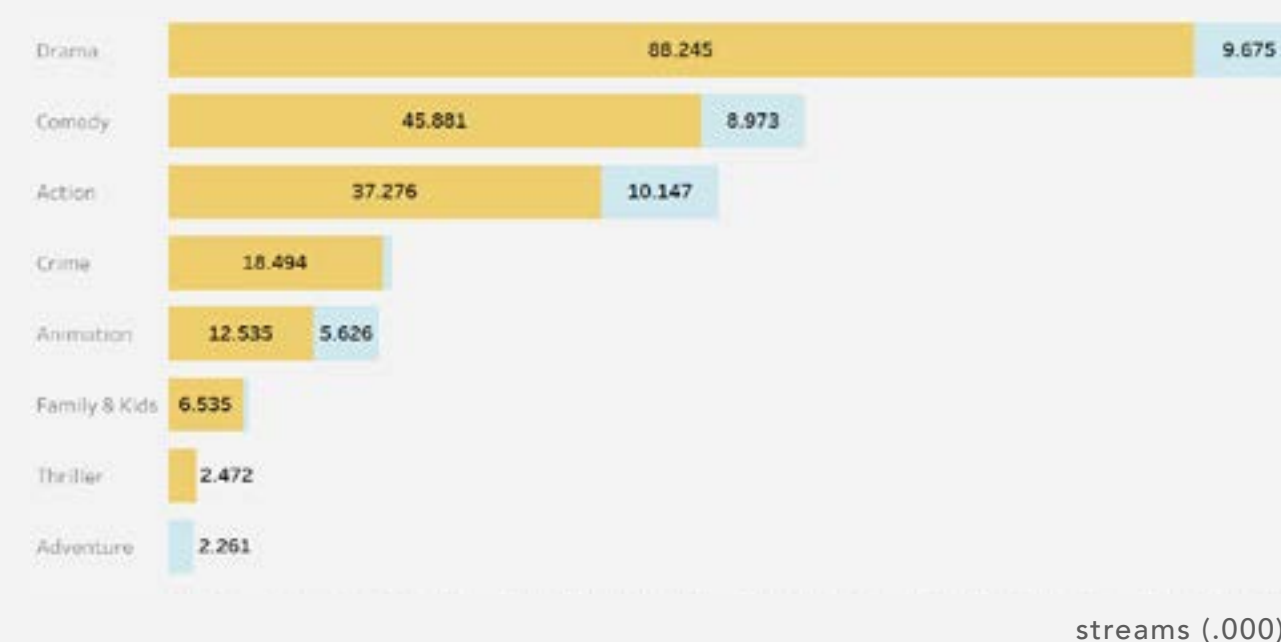
TWO RELEASES (THE NEW SEASONS OF “STRANGER THINGS” AND “PEAKY BLINDERS”) IMMEDIATELY GO TO NUMBER ONE IN THEIR RESPECTIVE GENRES: DRAMA AND CRIME

Comedy and action, for their part, are still dominated by third party licensed content: “The Big Bang Theory” and “Blindspot”, respectively.

AS IN THE TOP 100 FOR FILMS, NETFLIX GRABS MORE THAN HALF THE SHARE FOR TELEVISION DRAMA AND COMEDY IN THE MONTH OF JUNE

The figure in the category of drama is record breaking, with 97.9M total streams, much higher than the figure for the month of May, 94M streams, when Amazon and Netflix are taken together.

TOTAL STREAMS BY GENRES PLATFORM COMPARATIVE



THE PREFERENCE FOR GENRES IS ALSO CLEAR ON AMAZON, ALBEIT WITH A CONSIDERABLY SMALLER VOLUME OF STREAMS

Prime Video brings 9.6M streams to the drama category and almost 9M to comedy, at some distance from Netflix’s figures.

OTT

- Amazon
- Netflix

HOT CONTENT IN ITALY

“ODIO L’ESTATE”, A GOOD BOX OFFICE RETURN MAKES A DIFFERENCE FOR A PLATFORM DEBUT

“Odio l’estate”, directed by Massimo Venier and starring the popular trio of Italian comics Aldo, Giovanni y Giacomo, provides a new example of the effect a good theatrical release can have for commercial exploitation in the remaining widows.

A hit-and-miss comedy in which three men reserve, unbeknownst to each other, the same house for their family holidays, turning their summer into a comic exercise in tolerance.

It was released in Italian cinemas on January 30, 2020, just before the pandemic hit Italy very hard. It became the third biggest box office release for the year, taking over seven million euros.

On June 1, 2020, “Odio l’estate”, landed in the Netflix catalogue, and reached top position in the ranking of the most watched local and European productions in Italy during that month, at quite a distance from the rest of the field.

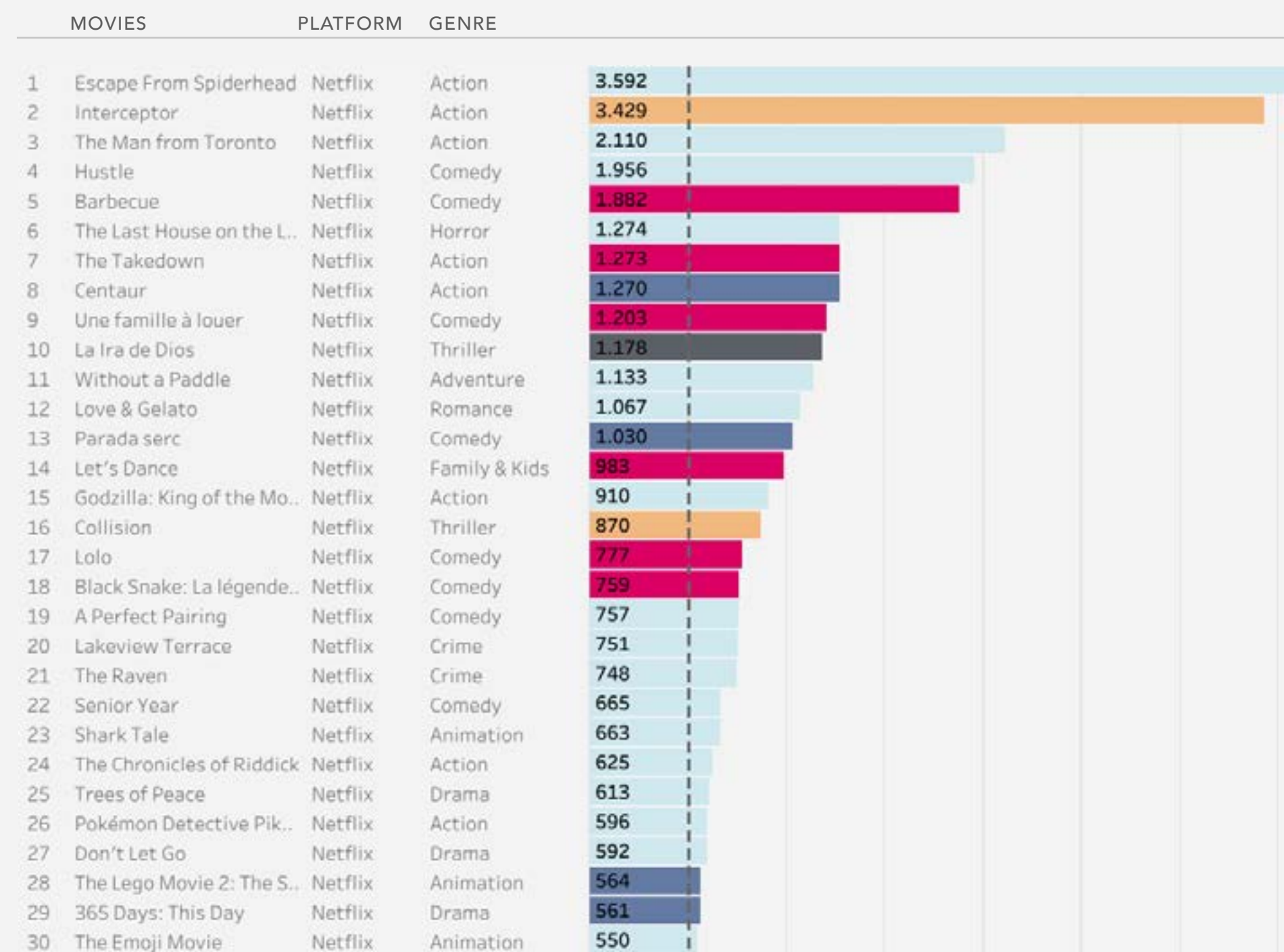
There is no doubt that the genre, comedy, has been one of the major levers of consumption in a country very fond of home-grown humour. The good figures for “Odio l’estate”, are, however, the consequence of another decisive factor: a good theatrical release. The more modest results of other, similar, titles, confirm this. Although a film follows manual-stipulated formula, as far as Italian comedy goes, it is the release in cinemas that contributes to making big titles, and, by extension, to the demand for them when they reach the domestic consumption phase.

Local producers, especially in territories such as Italy, have a great strategic opportunity for sale to the streaming window, increasingly mindful of the fact that popular titles provide good viewing statistics and, by extension, enhance the possibility of being kept by the platform.



FRANCE 100 MOVIES | OVERVIEW

TOTAL STREAMS BY MOVIE NETFLIX - AMAZON



SHOWING 30/100 - See complete chart here

streams (.000)

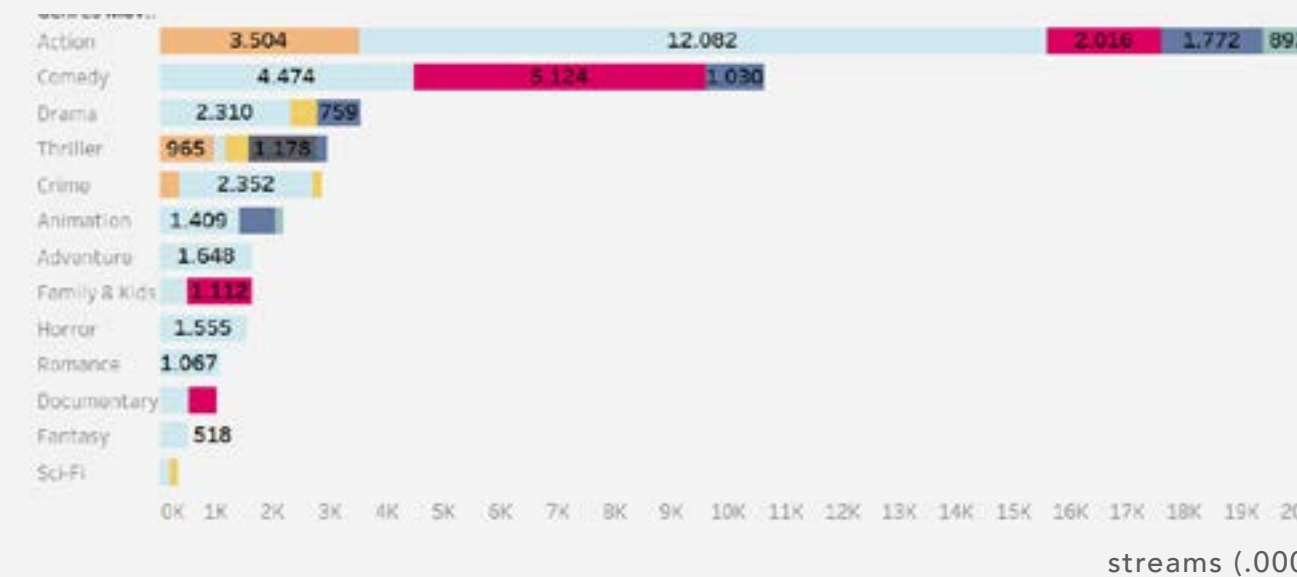
PRODUCTION COUNTRIES



CATALOG SHARE BY COUNTRY NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES NETFLIX - AMAZON



ACTION RULES

Action is once again crowned leader in the month of May although this time success isn't attributable to any local production. In June "Escape from Spiderhead" and "Interceptor" are practically even in the Top 10 of films most watched via streaming. The two action films, one with touches of science fiction and the other classical fare, together garner almost 7M streams this month.

THREE FRENCH PRODUCTIONS IN THE TOP 10

Comedies "Barbecue" and "Une famille à Loeur" and the action title "The Takedown" (leader during the month of May) shape French representation in the top 10 of the most watched programmes in June. In total, local films take 15% of the share of the most watched films in France.

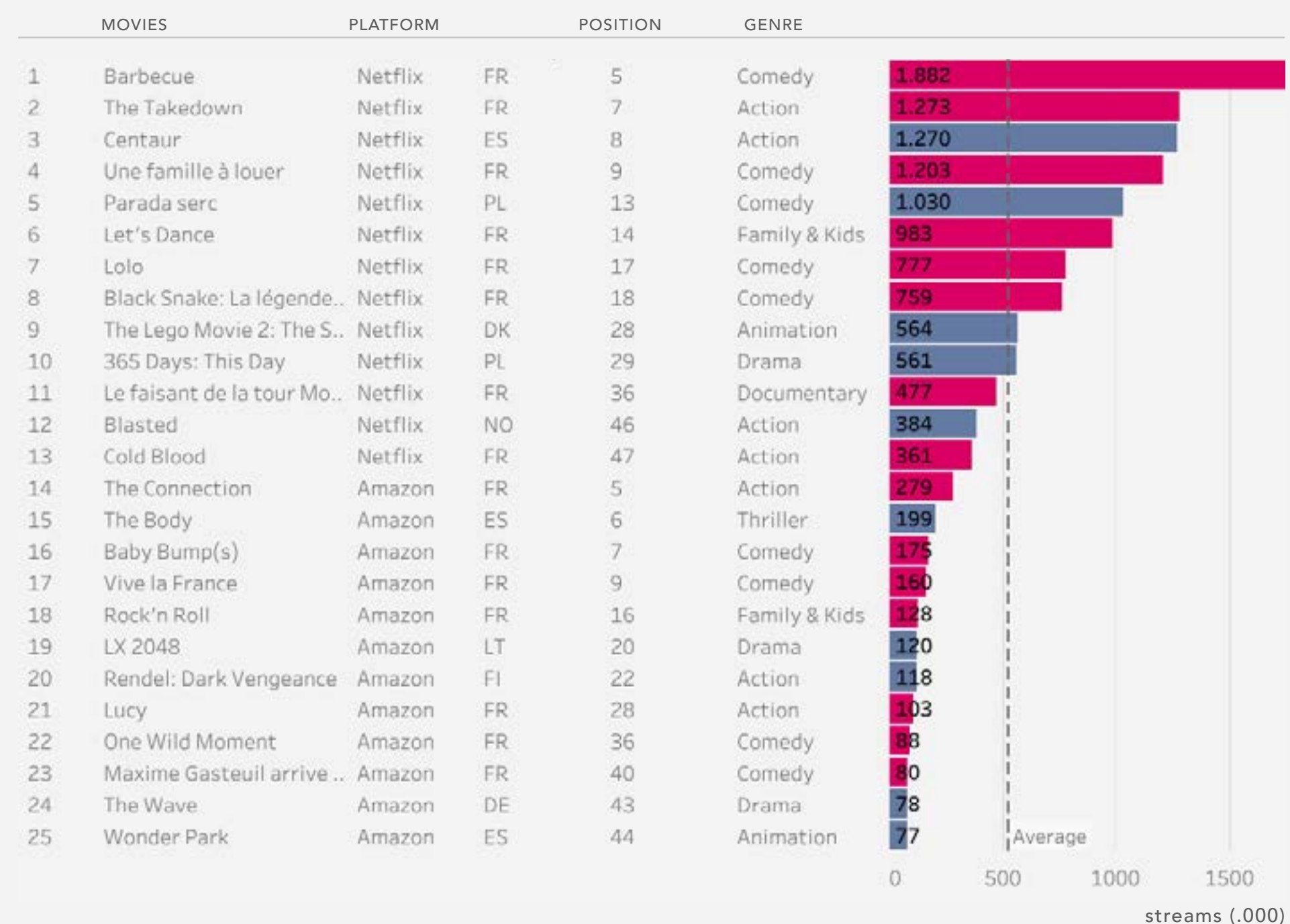
THE PRESSURE OF THE NETFLIX SUPPLY TANK

The abundance of Netflix production and the pressure of the international promotion of its original titles seems to set a glass ceiling that no Amazon film can manage to break.

FRANCE 100 MOVIES | EUROPEAN FOCUS

LOCAL AND EUROPEAN MOVIES IN THE TOP 100

NETFLIX - AMAZON

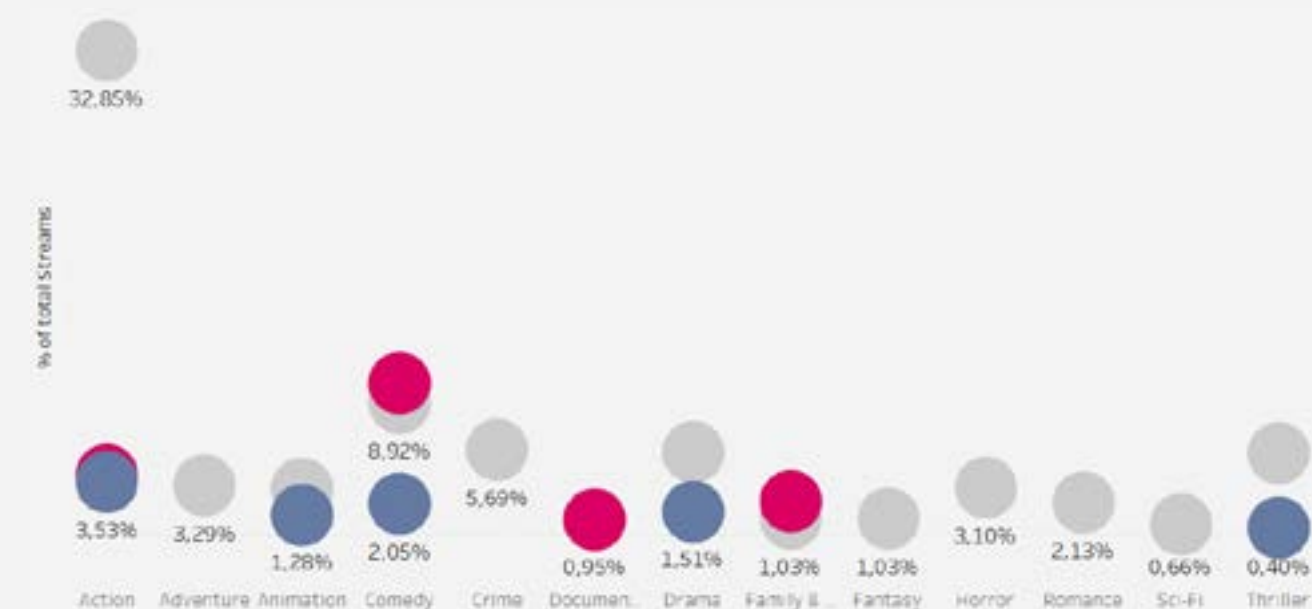


PRODUCTION COUNTRIES



CONTRIBUTION OF LOCAL & EUROPEAN MOVIES TO TOTAL STREAMS

NETFLIX - AMAZON

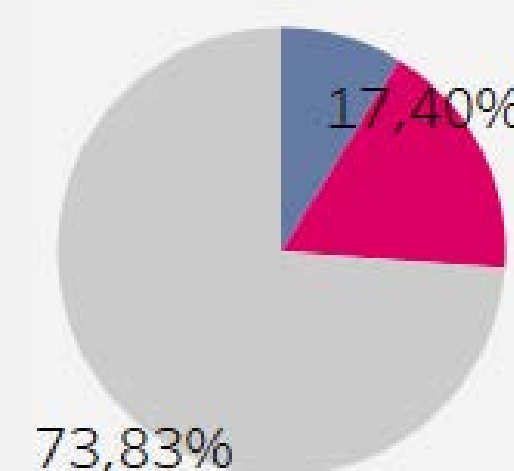


NUMBER OF TITLES BY GENRES

NETFLIX - AMAZON

| GENRE | EU | FR |
|---------------|----|----|
| Action | 3 | 4 |
| Animation | 2 | 1 |
| Comedy | 1 | 8 |
| Documentary | | 1 |
| Drama | 3 | |
| Family & Kids | | 2 |
| Thriller | 1 | |

CONTRIBUTION TO DRAMA STREAMS



ONLY A FEW EUROPEAN TITLES FIND AN OPENING IN CONSUMPTION THAT IS CLEARLY TILTED TOWARDS CONSUMPTION OF LOCAL FARE

Only "Centaur" (Spain) and "Parada Serc" (Poland) manage to make their way into the Top 5 of the most watched European content in France. They do so, as well, with viewing statistics near to the figures for French production, which dominates the ranking list with a newly released comedy and the second month of an action title ("The Takedown").

AMAZON SNEAKS MORE LOCAL TITLES INTO THE FRENCH AUDIOVISUAL MENU

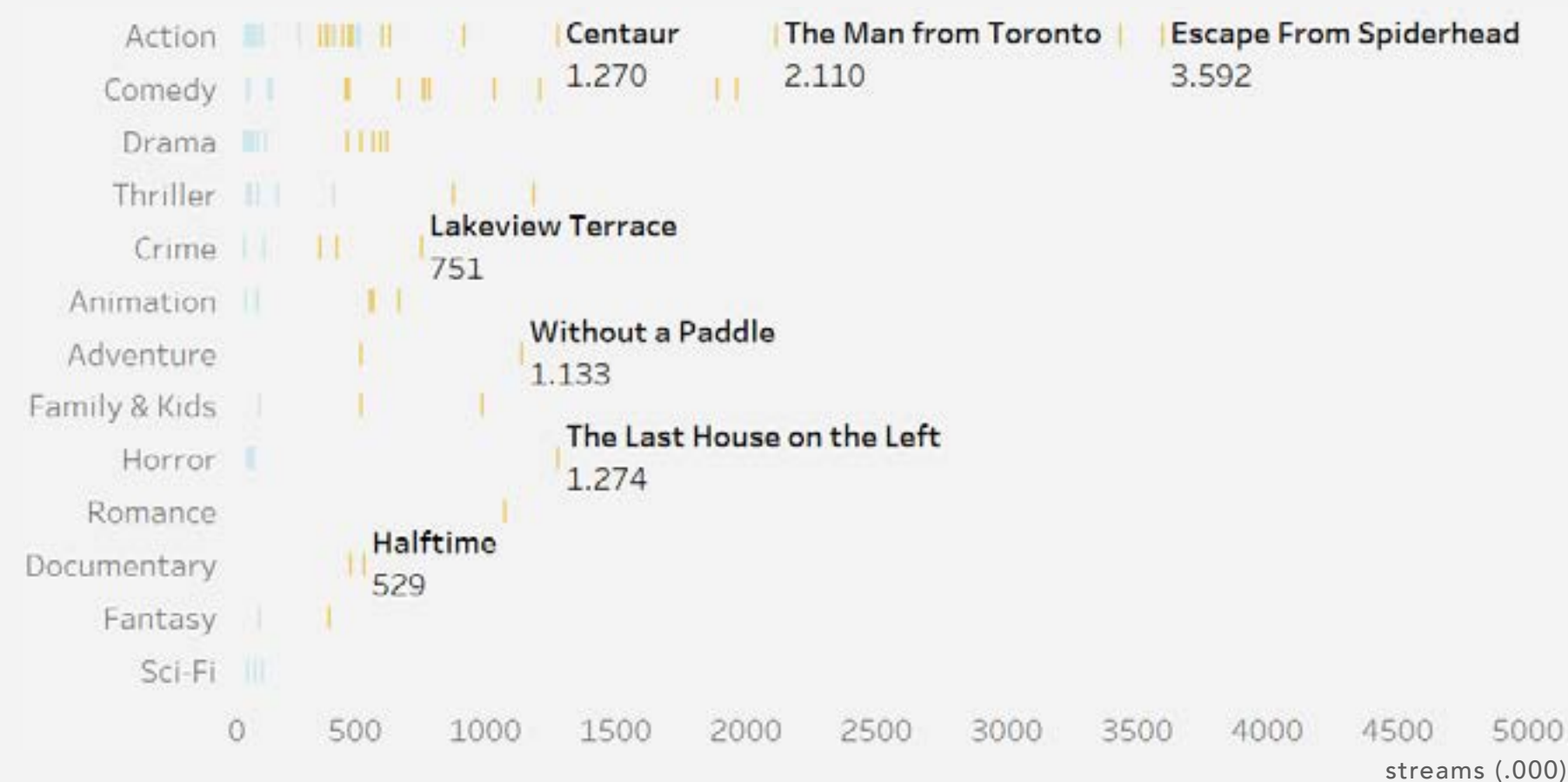
Prime Video's position is bettered when content is pitched against other local productions in French territory. The merit redounds to catalogue content that has had prior distribution success. Amazon still doesn't have an original French film with viewing statistics comparable to figures for Netflix titles.

FRANCE, THE CRADLE OF COMEDY

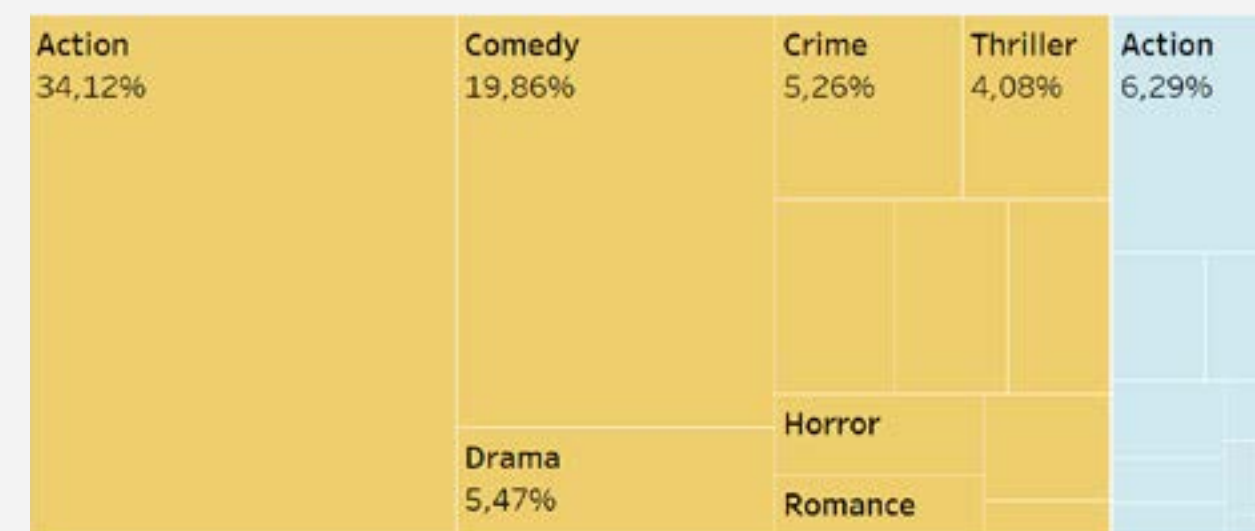
French comedy has become a genre in itself. Its contribution to total European contents streams is 10.22%, with, in all, 8 productions in the top 10 of the most watched programmes of the month, garnering some 5.1M streams.

FRANCE 100 MOVIES | SVOD PLATFORMS

TOP MOVIES STREAMS BY GENRES



MOST WATCHED GENRES SHARE BY PLATFORM



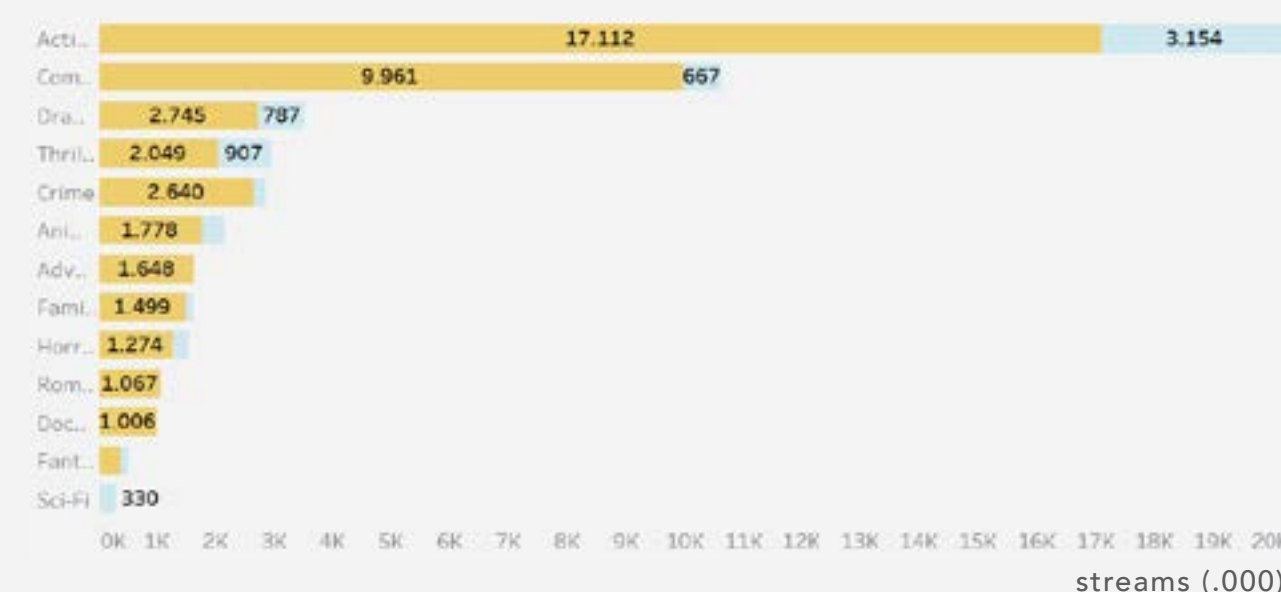
NETFLIX MONOPOLISES CONSUMPTION VIA STREAMING THANKS TO THE VOLUME AND POPULARITY OF ITS TITLES

The popularity of Netflix's action and comedy fare readily provides Netflix with over 50% of the 100 most reproduced titles in the month of June. Action also is Amazon's best positioned genre, albeit at some distance from its competitor (just over 3M streams as against the more than 17M streams accumulated by the titles of this genre on Netflix).

DRAMA, THRILLER AND CRIME STILL HAVING A HARD TIME

It doesn't appear that the heat of summer is helping to win French audiences back to these genres, which are normally well received. The cume figure for the three genres, over 7M streams, comes nowhere near the figures for comedy.

TOTAL STREAMS BY GENRES PLATFORM COMPARATIVE



OTT

- Amazon
- Netflix

FRANCE 100 SHOWS | OVERVIEW

TOTAL STREAMS BY SHOW

NETFLIX - AMAZON



SHOWING 30/100 - See complete chart here

PRODUCTION COUNTRIES



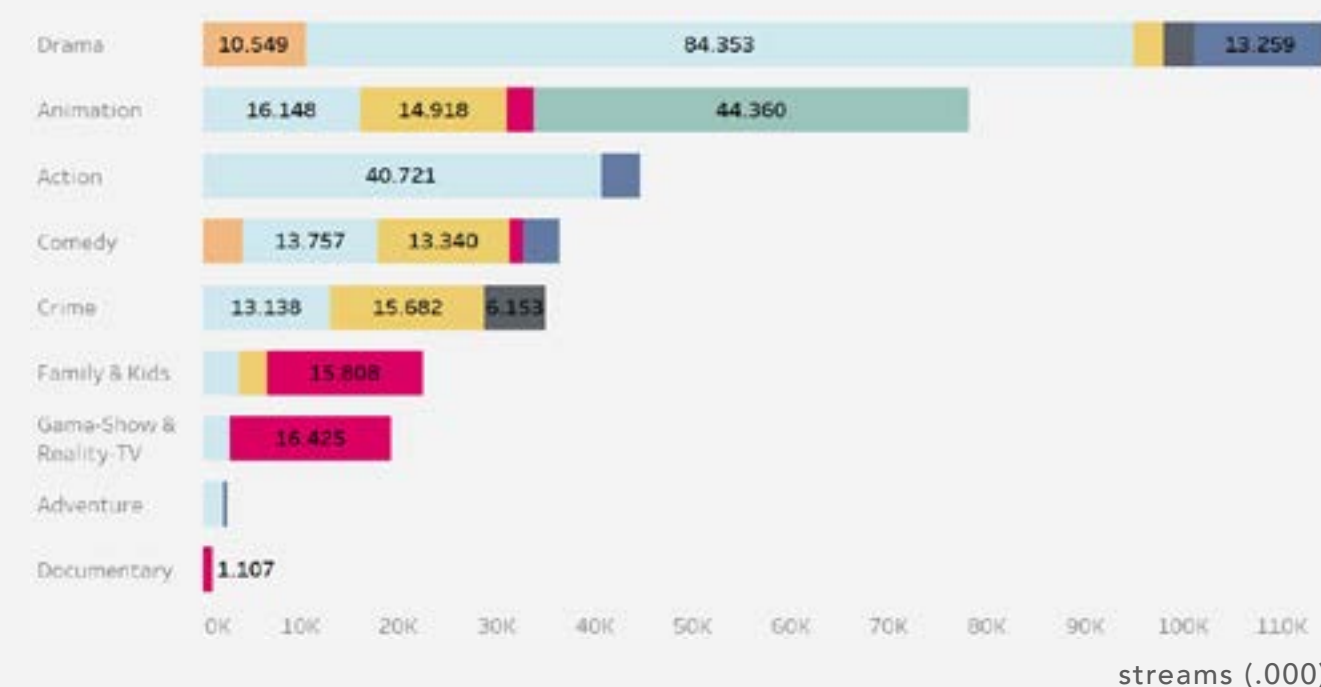
CATALOG SHARE BY COUNTRY

NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES

NETFLIX - AMAZON



THE MONTH OF "STRANGER THINGS"

"Quién mató a Sara", leader in May, doesn't prove strong enough to withstand the might of the release of the fourth season of "Stranger Things". As in surrounding countries, the Duffer brothers' series is breaking records in France, comfortably at number 1 in the Top 100 of the most watched programmes in June. Another release for series buffs, "The Umbrella Academy", takes the number 2 position, with 26.6M streams. This is the visible face of the power of the marketing machinery that Netflix can deploy at the service of its most successful IPs.

THE "RHYTHM + FLOW" FRANCE PHENOMENON

The French version of this North American programme in which three judges choose the future rap star, with a 100-hundred-thousand-euro prize at stake, completes the top 3 of the most watched television programmes in France. Quite a commendable position if we take into account that that it has made its way into more households than classics such as "Peaky Blinders" and "Peppa Pig".

FRANCE 100 SHOWS | EUROPEAN FOCUS

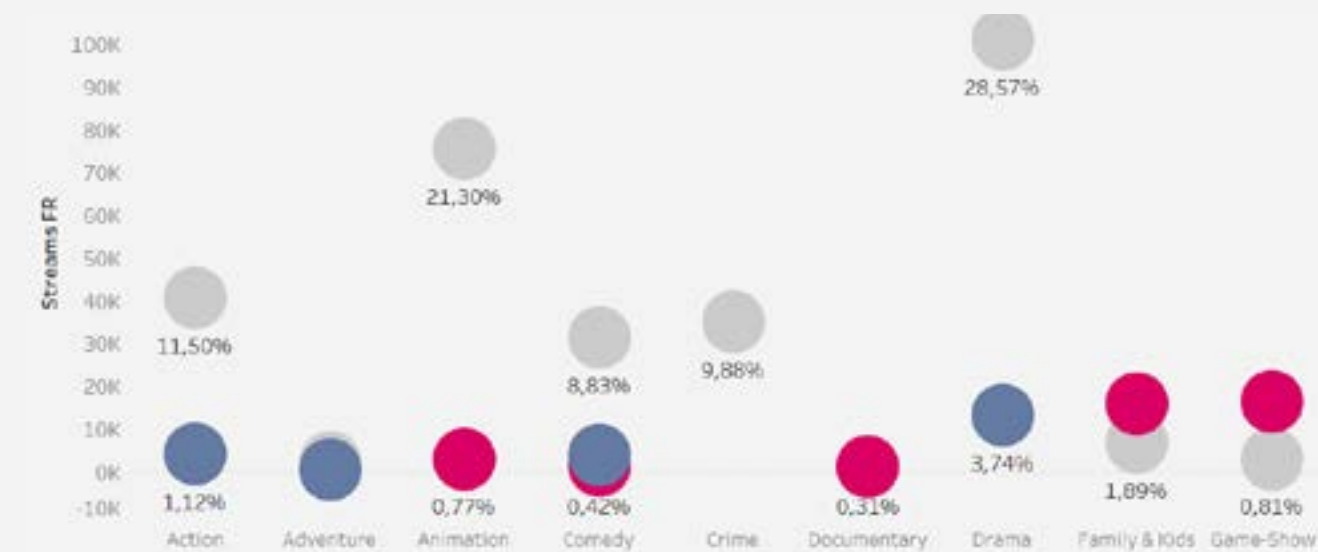
LOCAL AND EUROPEAN SHOWS IN THE TOP 100 NETFLIX - AMAZON

| SHOWS | SEASON | PLATFORM | RANK | GENRE | STREAMS | |
|-------|---------------------------|----------|------|-------|---------------|--------|
| 1 | Bienvenidos a Edén | Netflix | ES | 2 | Action | 18.647 |
| 2 | Grizzly and the Lemmings | Netflix | FR | 12 | Family & Kids | 7.749 |
| | | Netflix | FR | 46 | Family & Kids | 3.152 |
| 3 | Les sept vies de Léa | Netflix | FR | 10 | Crime | 8.183 |
| 4 | Miraculous: Tales of La.. | Netflix | FR | 14 | Animation | 6.434 |
| 5 | Elite | Netflix | ES | 15 | Crime | 5.998 |
| 6 | LOL, qui rit, sort ! | Amazon | FR | 1 | Comedy | 3.641 |
| | | Amazon | FR | 3 | Comedy | 1.940 |
| 7 | Summertime | Netflix | IT | 19 | Drama | 4.737 |
| 8 | Entrevías | Netflix | ES | 21 | Drama | 4.539 |
| 9 | Clark | Netflix | SE | 27 | Crime | 4.227 |
| 10 | Zachowaj spokój | Netflix | PO | 28 | Crime | 4.193 |
| 11 | Zig & Sharko | Netflix | FR | 32 | Animation | 3.887 |
| 12 | Baraki | Netflix | BE | 33 | Comedy | 3.871 |
| 13 | Petit ours brun | Netflix | FR | 38 | Family & Kids | 3.583 |
| 14 | Simon | Netflix | FR | 42 | Animation | 3.306 |
| 15 | The Boarding School: La.. | Amazon | ES | 17 | Drama | 474 |
| 16 | Bang Bang Baby | Amazon | IT | 27 | Adventure | 391 |
| 17 | La Unidad | Amazon | ES | 35 | Action | 338 |
| 18 | Les Sisters | Amazon | FR | 39 | Family & Kids | 317 |
| 19 | The Garfield Show | Amazon | FR | 40 | Family & Kids | 314 |
| 20 | Orelsan: Montre jamais .. | Amazon | FR | 44 | Documentary | 300 |

PRODUCTION COUNTRIES

- Europe
- France
- Others

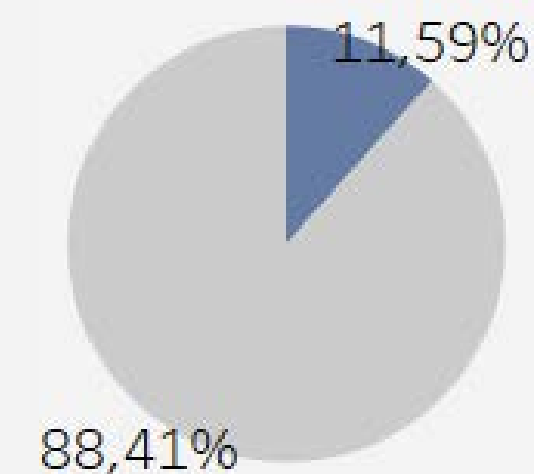
CONTRIBUTION OF LOCAL & EUROPEAN SHOWS TO TOTAL STREAMS NETFLIX - AMAZON



NUMBER OF TITLES BY GENRES NETFLIX - AMAZON

| GENRE | EU | FR |
|---------------------|----|----|
| Drama | 3 | |
| Family & Kids | | 2 |
| Comedy | 1 | 1 |
| Game-Show & Reali.. | | 1 |
| Documentary | | 1 |
| Animation | | 1 |
| Adventure | 1 | |
| Action | 1 | |

CONTRIBUTION TO DRAMA STREAMS



LOCAL CONTENT FINDS A GOOD MONEYSPINNER IN THE MOST CLASSIC ENTERTAINMENT

Streaming is maturing and making a very successful debut in genres traditionally reserved to television. The good figures for Netflix's "Rythm + Flow France" – a talent show – and of the French version of "LOL" – a kind of reality quiz show with famous comedians – confirm that these two formats also work on demand.

"INTIMIDAD", "ENTREVÍAS" AND "WELCOME TO EDEN" OPEN TO FRENCH AUDIENCES

Three Spanish productions enter the top 10 of the most watched European content in France during the month of June. The success of these three productions is such that the French open their audiovisual tastes towards their favourite genres produced in territories around them.

LOCAL PRODUCTION IMPETUS IN THE DOMAIN OF TELEVISION PROGRAMMES HALTED DUE TO PRESSURE FROM THE HOLLYWOOD MAINSTREAM

The Hollywood tsunami undermines the representation of glocal content, reducing the contribution of European and French productions to a total stream figure of 58M in June, compared to the previous month (90M, in May).

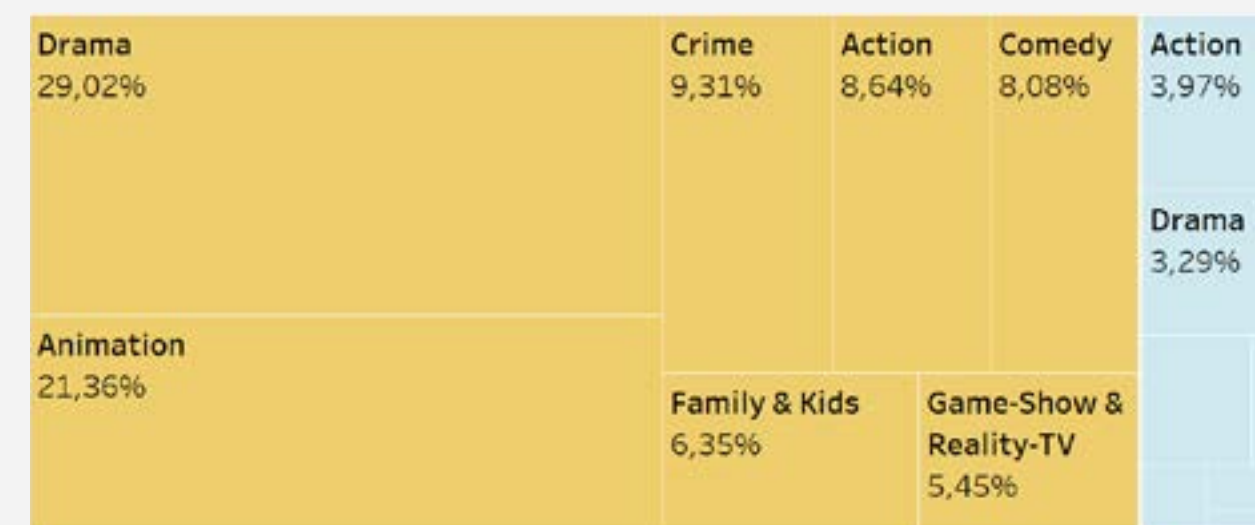
FRANCE 100 SHOWS | SVOD PLATFORMS

TOP SHOWS STREAMS BY GENRES



MOST WATCHED GENRES

SHARE BY PLATFORM



GREATER GENRE DIVERSITY

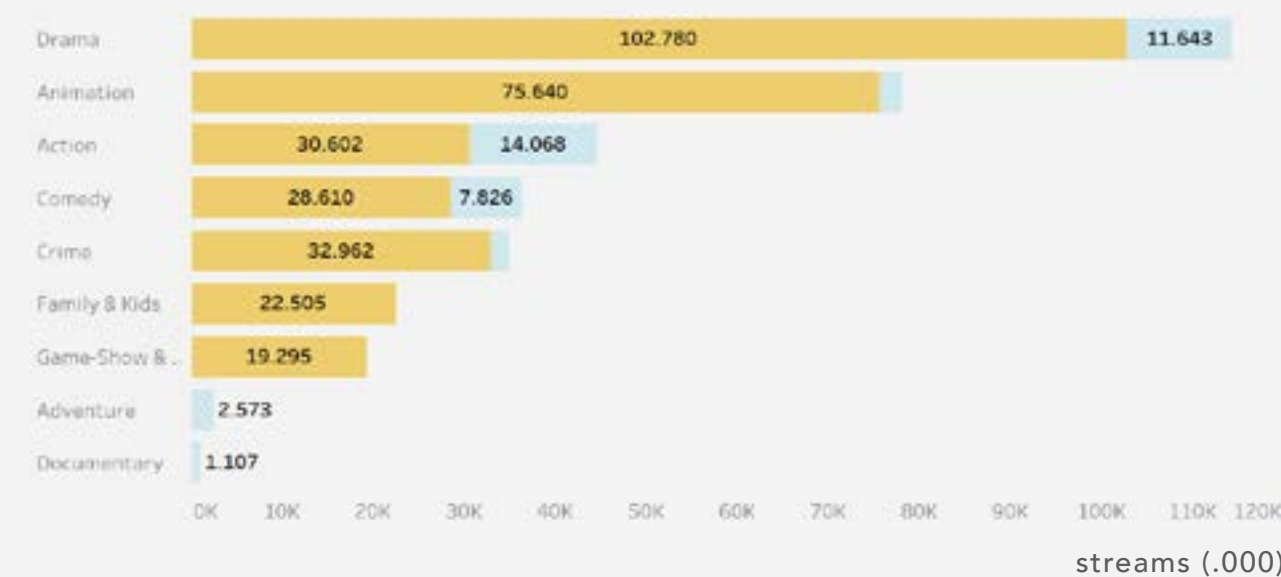
Television genres are more diversified. Drama, thanks to the shot in the arm from by the fourth season of "Stranger Things", accounted for 29.02% of the most watched TV programmes in France during the month of June, followed by Animation, Crime, Action and comedy content. Animation, leader with 28.55% of the share of the 100 most watched programmes in May, registered a sharp 7 point fall in June.

AMAZON MANAGES TO POSITION ITSELF IN GENRES, WITH HARDLY ANY COMPETITION

Amazon continues to have a problem with regard to general positioning of television programmes, in the face of the abundance of Netflix releases.

TOTAL STREAMS BY GENRES

PLATFORM COMPARATIVE



OTT

- Amazon
- Netflix

HOT CONTENT IN FRANCE

“RHYTHM & FRANCE”

The French version of this North American program in which three judges choose the future rap star was the third most watched television program in France in June, behind only the new season of “Stranger Things” and “The Umbrella Academy”.

“Rhythm + Flow” is a Netflix musical talent contest in which French rappers compete amongst each other. At stake: a prize of one hundred thousand euros. To win that prize, they have to convince a jury comprising three stars of the genre: Niska, Shay and SCH. The programme tests participants through different exercises well known in the world of hip-hop and rap, such as freestyle (improvisation), written battles and live performance alongside an established exponent of the genre.

Why do game shows, realities and talent shows appear to be the new gold mine for streaming platforms?

The fact that there now is a proliferation of traditional television formats within the program offers of platforms like Netflix and Prime Video is a question of strategy.

It is true that non-fiction still represents a very small proportion of catalogues, especially if it is compared to fiction contents, but its contribution in terms of gaining faithful audiences is clear. With the present saturation of platforms and the difficulty with regard to keeping a subscriber twelve months a year, platforms have realised that they need to explore the genres that have brought so much joy to televisions in order to retain and broaden their subscriber base.

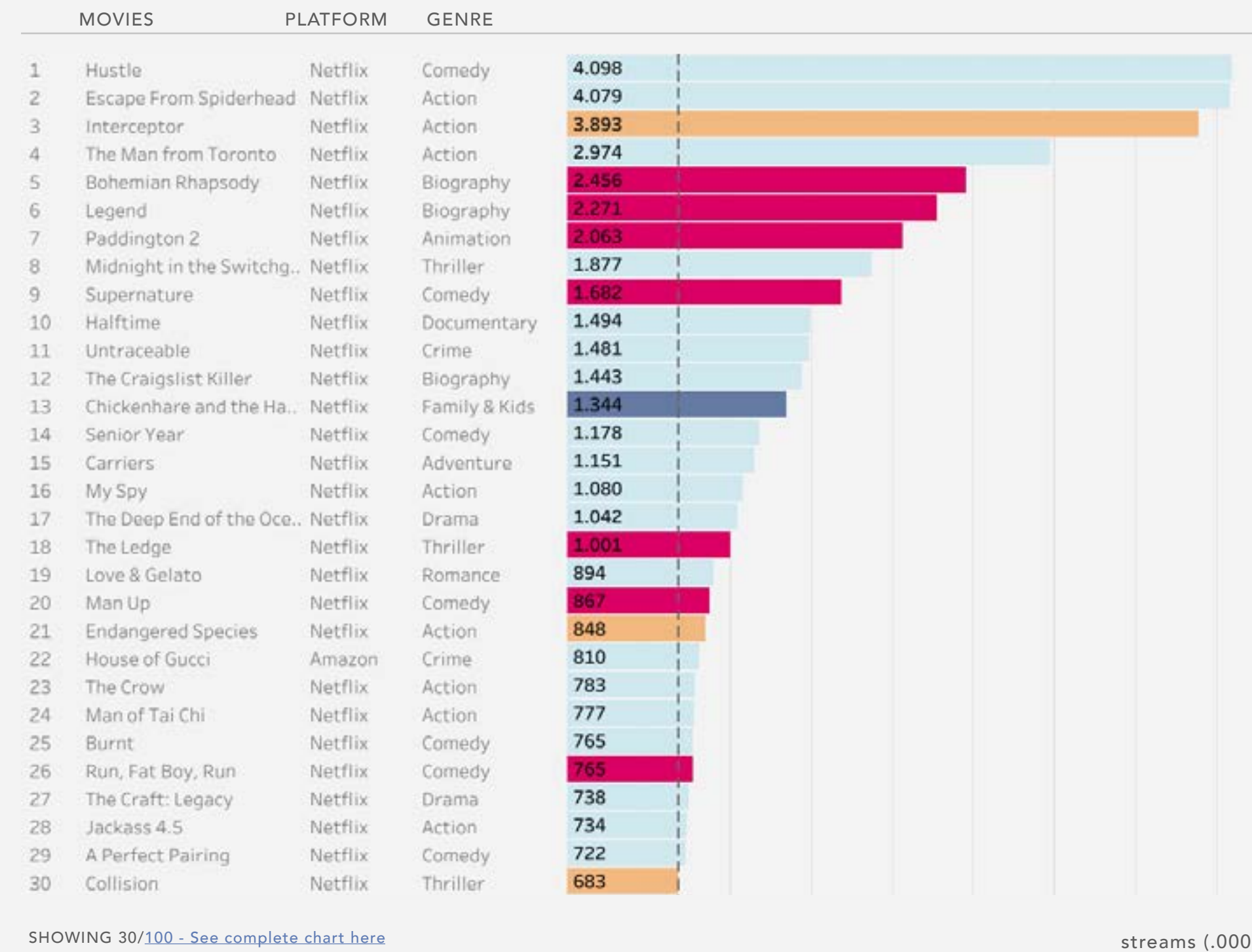
The aim seems clear: transfer part of the very high demand for this type of television formats towards streaming, and consolidate their position in households as services that can satisfy very diverse audiences and be an entertainment option as a matter of course, by default as it were, as television once was in all households.

Streaming is driving this format, offering new points of view in something that is already very well known. The transformation of the format for the purpose of its adaptation to the conventions of streaming offers many opportunities.

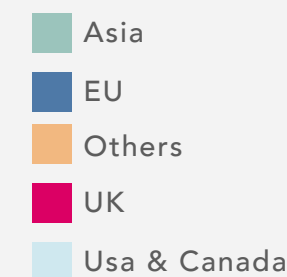


UK 100 MOVIES | OVERVIEW

TOTAL STREAMS BY MOVIE NETFLIX - AMAZON



PRODUCTION COUNTRIES



CATALOG SHARE BY COUNTRY NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES NETFLIX - AMAZON



TOP THREE NAMES: ADAM SANDLER, CHRIS HEMSWORTH AND ELSA PATAKY

Netflix's three big mainstream film bets for the month of June are at the top of the 100 most watched programmes: "Hustle" and "Escape from Spiderhead", (over 4 million streams) and "Interceptor", (3.6 million streams).

FOUR BRITISH PRODUCTIONS IN THE TOP 10

Two titles recently incorporated into the Netflix UK catalogue push that country's production up among the top positions of the most watched programmes for the month. The multi-award-winning "Bohemian Rhapsody" and the second part of "Paddington". Two Netflix originals complete British representation in the top 10: "Legend", a story based on true-to-life events, starring Tom Hardy, and "Supernatural", a Ricky Gervais comedy special.

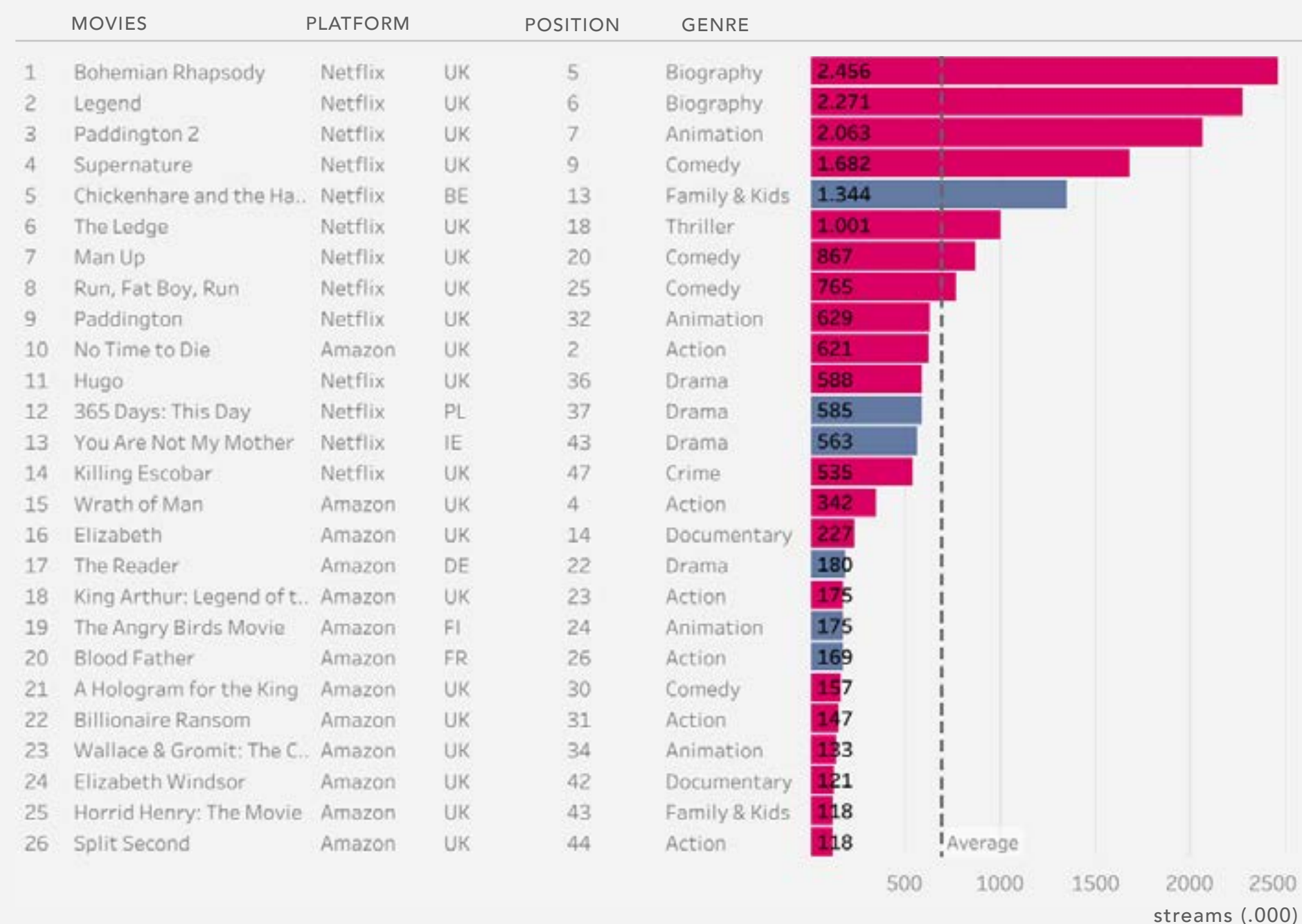
UK REPLICATES THE EUROPEAN PATTERN WITH REGARD TO GENRE PREFERENCES

Action and comedy are at the top of the programmes in greatest demand, with productions coming overwhelmingly from the USA and Canada, with 22.3M and 12.7M streams respectively.

UK 100 MOVIES | EUROPEAN FOCUS

LOCAL AND EUROPEAN MOVIES IN THE TOP 100

NETFLIX - AMAZON

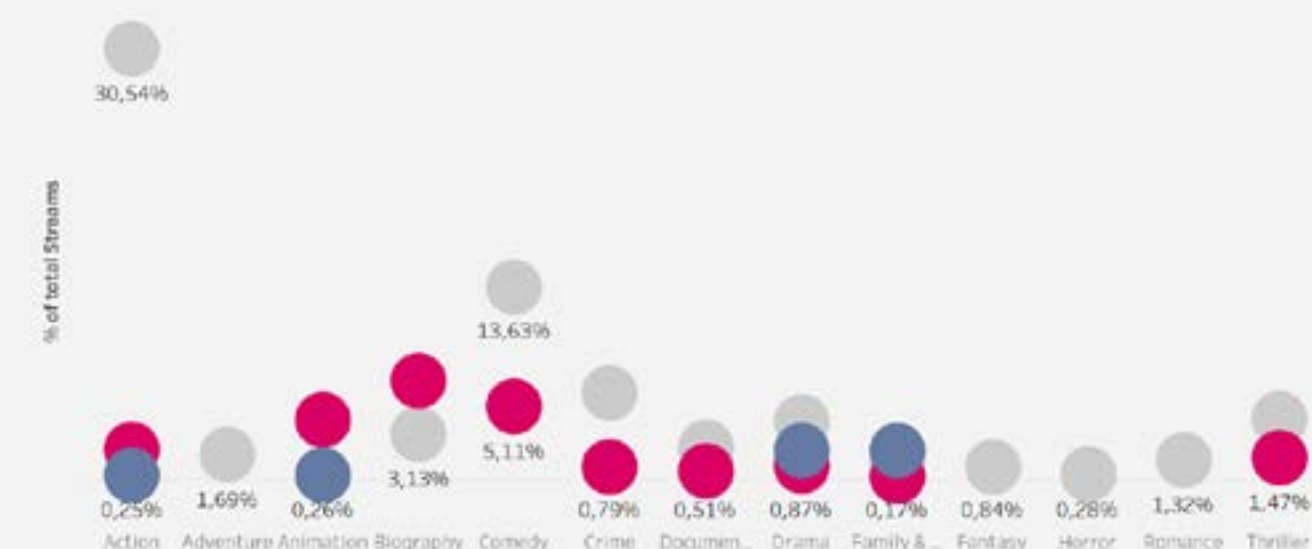


PRODUCTION COUNTRIES



CONTRIBUTION OF LOCAL & EUROPEAN MOVIES TO TOTAL STREAMS

NETFLIX - AMAZON

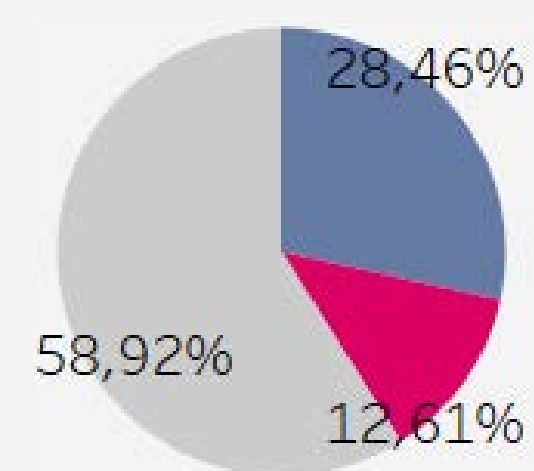


NUMBER OF TITLES BY GENRES

NETFLIX - AMAZON

| GENRE | EU | UK |
|---------------|----|----|
| Action | 1 | 5 |
| Animation | 1 | 3 |
| Biography | | 2 |
| Comedy | | 4 |
| Crime | | 1 |
| Documentary | | 2 |
| Drama | 3 | 1 |
| Family & Kids | 1 | 1 |
| Thriller | | 1 |

CONTRIBUTION TO DRAMA STREAMS



THE BRITISH SPECTATOR GOES FOR A VARIED MENU OF REAL STORIES, COMEDY AND FAMILY CONTENT

In spite of the UK's contribution to the production of action cinema, its results, in terms of the number of streams, is not significant, especially when the good figures in other categories such as biographies, comedy and animation are taken into account, thanks, in large measure, to catalogue content.

ONLY ONE EUROPEAN PRODUCTION MANAGES TO SNEAK INTO THE TOP 10 OF LOCAL FILMS IN JUNE

That film is the Franco-Belgian animation film, "Chickenhare" and "The Hamster of Darkness", which also had good figures in Germany.

THE AWESOME STRENGTH OF THE AMAZON CATALOGUE FURTHER UNDERLINED WITH THE LAST JAMES BOND FILM

The success of this original production is not, however, sufficient to overcome the pressure and might of Netflix releases. The strategy of the e-commerce platform, which specialises in more fragmented consumption, cannot compete with Netflix's vast contents catalogue. Getting local production to function well continues to be Amazon's major, unresolved challenge.

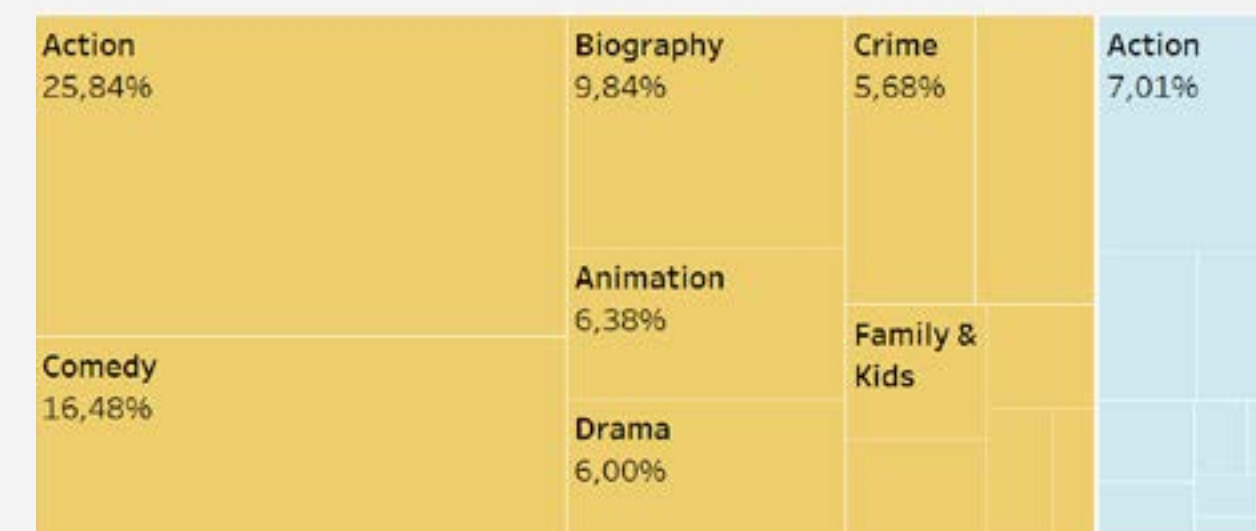
UK 100 MOVIES | SVOD PLATFORMS

TOP MOVIES STREAMS BY GENRES



MOST WATCHED GENRES

SHARE BY PLATFORM



ACTION IS THE MOST REPRODUCED GENRE ON NETFLIX AS WELL AS AMAZON, WITH OVER 32% OF TOTAL STREAMS

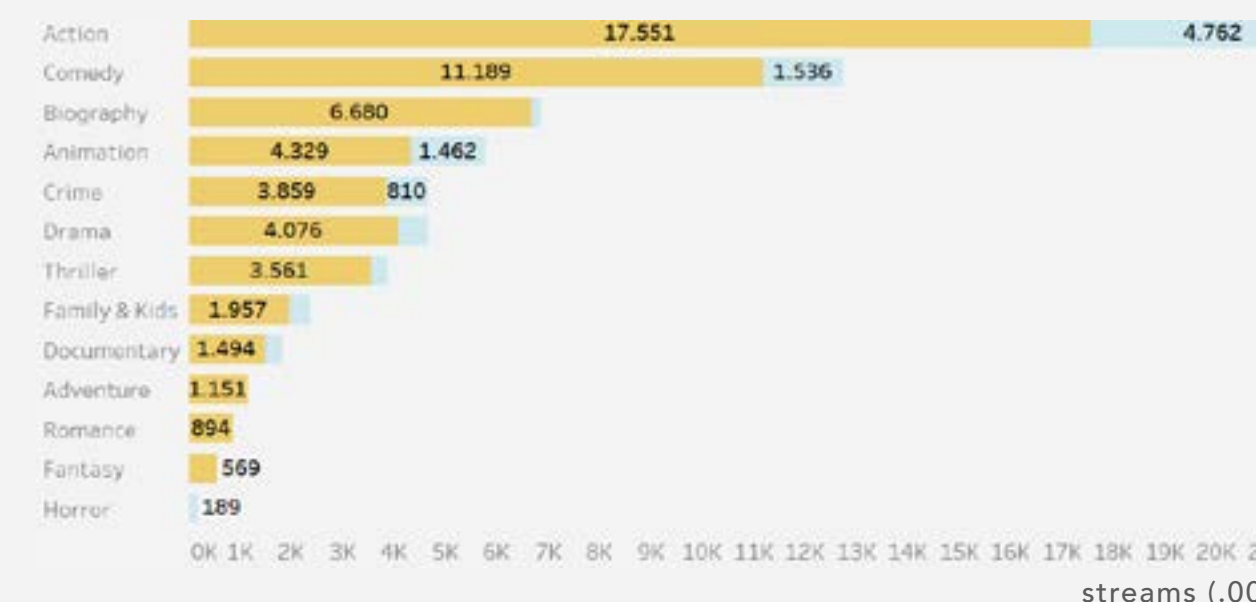
Platforms' programming clearly veers towards the domestic blockbuster. The promotion of originals such as "Escape from Spiderhead" and "Interceptor" readily guarantees them big figures.

THE CONSUMPTION GAP BETWEEN GENRES IS SIGNIFICANT AND CATEGORIES SUCH AS DRAMA, ROMANCE AND ADVENTURE RETURN VERY POOR FIGURES

Drama, especially, has fallen sharply into sixth position, with only just one title getting more than a million streams, "The Deep End of the Ocean", a catalogue classic.

TOTAL STREAMS BY GENRES

PLATFORM COMPARATIVE

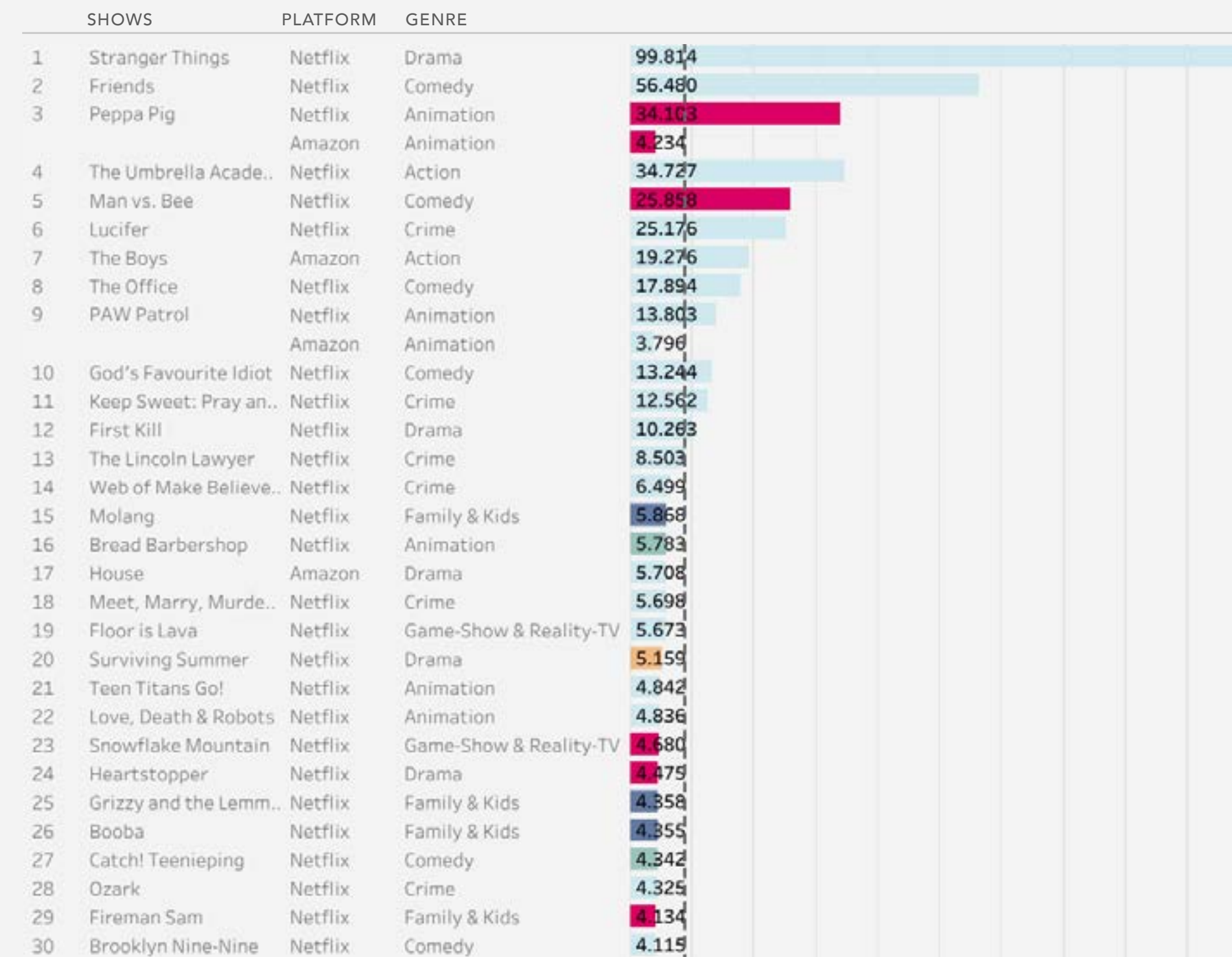


OTT

- Amazon
- Netflix

UK 100 SHOWS | OVERVIEW

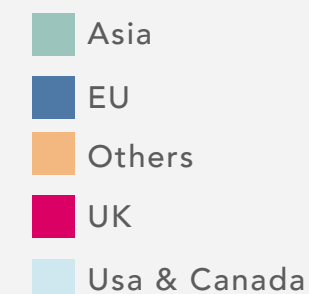
TOTAL STREAMS BY SHOW NETFLIX - AMAZON



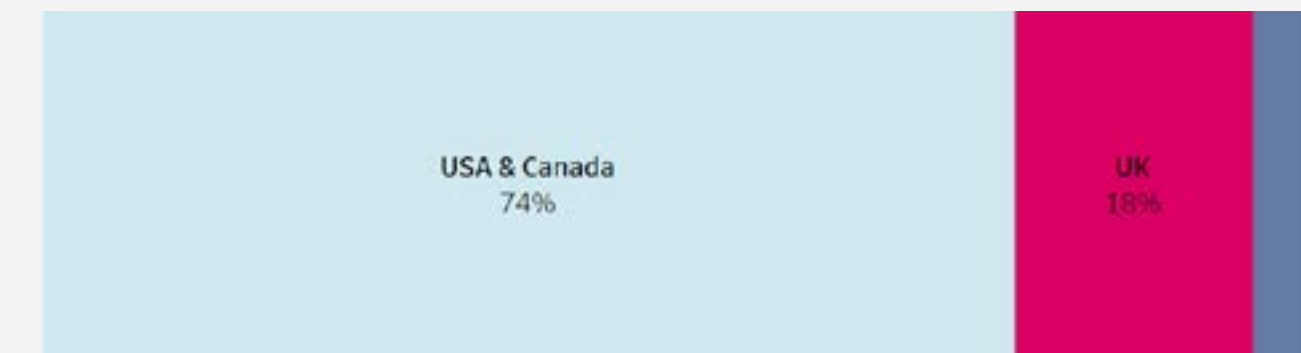
SHOWING 30/100 - [See complete chart here](#)

streams (.000)

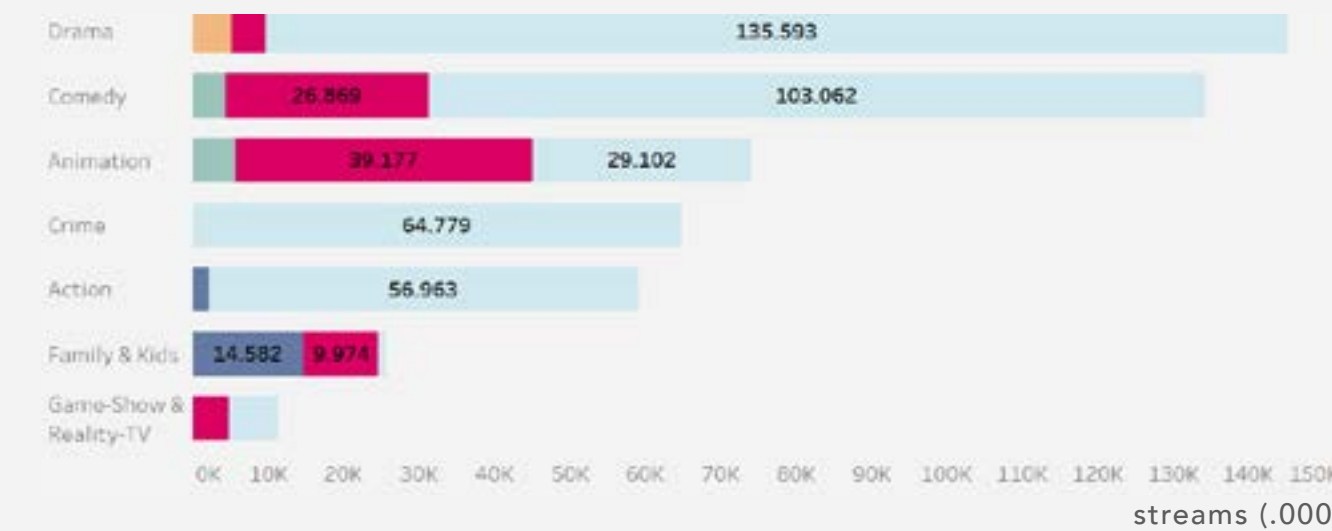
PRODUCTION COUNTRIES



CATALOG SHARE BY COUNTRY NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES NETFLIX - AMAZON



THE UK, A HOT MARKET FOR NETFLIX'S MAJOR INTELLECTUAL PROPERTY PRODUCTS: "STRANGER THINGS" AND "THE UMBRELLA ACADEMY"

The fourth season of "Stranger Things" achieves one of the best returns in Europe, doubling the figures of other countries: almost 100M streams make it the most watched TV programme of the month. The figures for "The Umbrella Academy" also stand out within the European panorama, though they are somewhat more modest (just over 34M streams).

CLASSIC SITCOM CONTINUES TO BE EXTREMELY DEAR TO THE BRITISH SPECTATOR

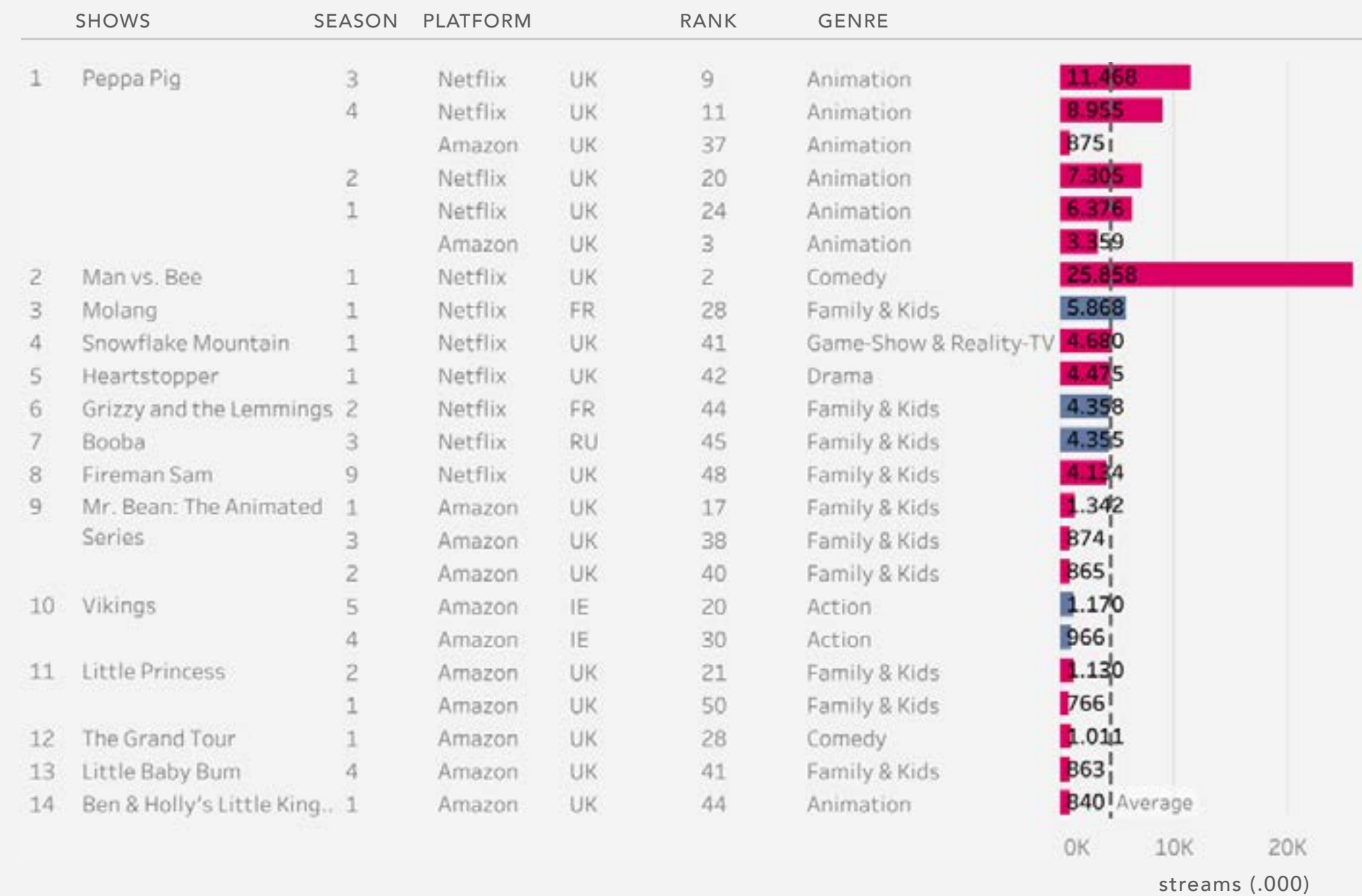
As is the case in Germany, licensed classic sitcoms have found a permanent place in the ranking of the most watched TV programmes on platforms. In the UK, this merit is chiefly attributable to "Friends" (56M streams) and "The Office" (17.9M streams).

NORTH AMERICAN PRODUCTIONS LEAVE LITTLE ROOM TO BRITISH AND EUROPEAN CONTENT IN ALL GENRES EXCEPT ONE: COMEDY AND ANIMATION

In a market such as the British market, where there is so little diversification, the results of "Peppa Pig" and "Man vs Bee" are particularly important. European representation in the general ranking comes from "Molang", at number 15, a licensed animation series quite popular thanks to Disney Channel.

UK 100 SHOWS | EUROPEAN FOCUS

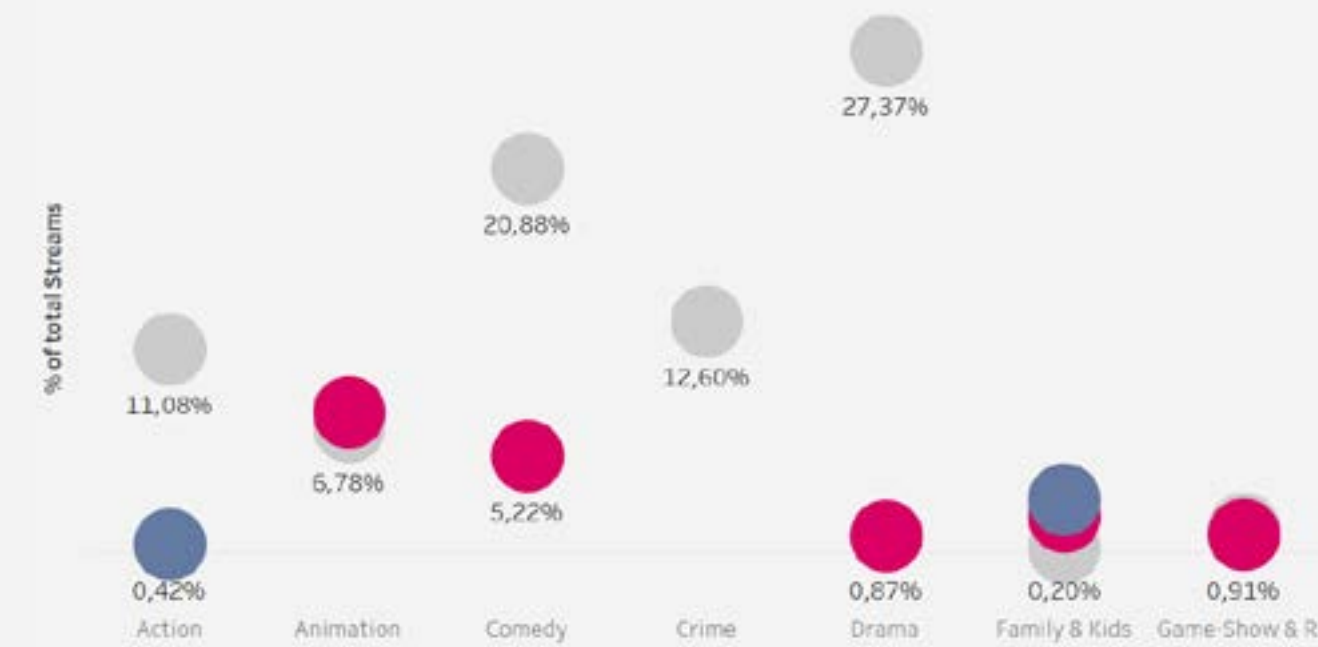
LOCAL AND EUROPEAN SHOWS IN THE TOP 100 NETFLIX - AMAZON



PRODUCTION COUNTRIES



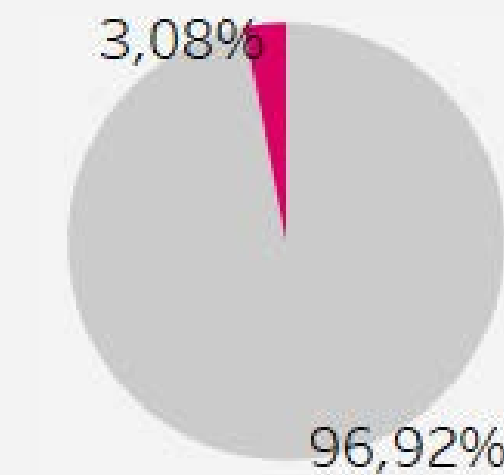
CONTRIBUTION OF LOCAL & EUROPEAN SHOWS TO TOTAL STREAMS NETFLIX - AMAZON



NUMBER OF TITLES BY GENRES NETFLIX - AMAZON

| GENRE | EU | UK |
|------------------------|----|----|
| Action | 1 | |
| Animation | | 2 |
| Comedy | | 2 |
| Drama | | 1 |
| Family & Kids | 3 | 4 |
| Game-Show & Reality-TV | | 1 |

CONTRIBUTION TO DRAMA STREAMS



“PEPPA PIG’S” VERY LONG TAIL

“Peppa Pig” accumulates almost 35M streams, comfortably leading the ranking. The success of this animation series, which became a phenomenon thanks to conventional television, has found a second and most prosperous life in OTTs. It represents one of the major contributions that the British production share represents in the domain of animation with regard to the total amount of local and European fare: 6.78%

“MAN VS BEE” CAPITALISES ON MR BEAN NOSTALGIA

“Man vs Bee” is the perfect series for those feeling nostalgia for the beloved and chaotic Mr Bean. The return of Rowan Atkinson to the small screen in short comedy format has led to a meteoric rise to second position in the ranking, with close to 26M streams.

DRAMA ONCE AGAIN FALLS TO A NEW LOW IN JUNE, WITH A 3% SHARE OF TOTAL GENRE STREAMS

Animation, comedy and kids content leave little room for European and local dramas. Only the “Heartstopper” phenomenon manages to sneak into the top 10 of the ranking. 11 weeks after release, it continues to get 4M streams.

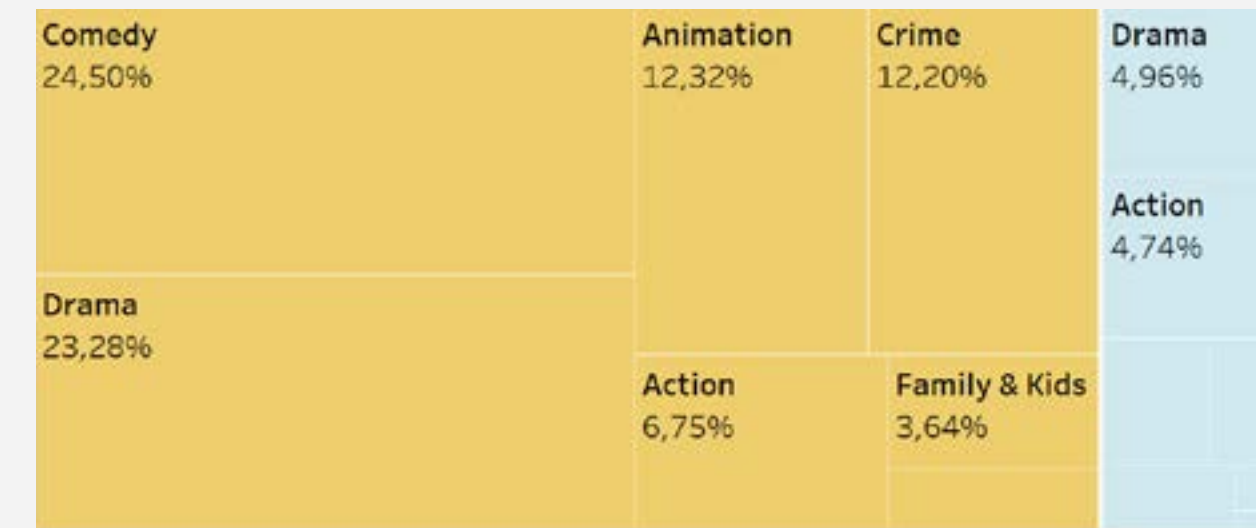
UK 100 SHOWS | SVOD PLATFORMS

TOP SHOWS STREAMS BY GENRES



MOST WATCHED GENRES

SHARE BY PLATFORM



DRAMA REACHES THE HEALTHY QUOTA ENJOYED BY COMEDY, WITH ALMOST 24% OF THE SHARE

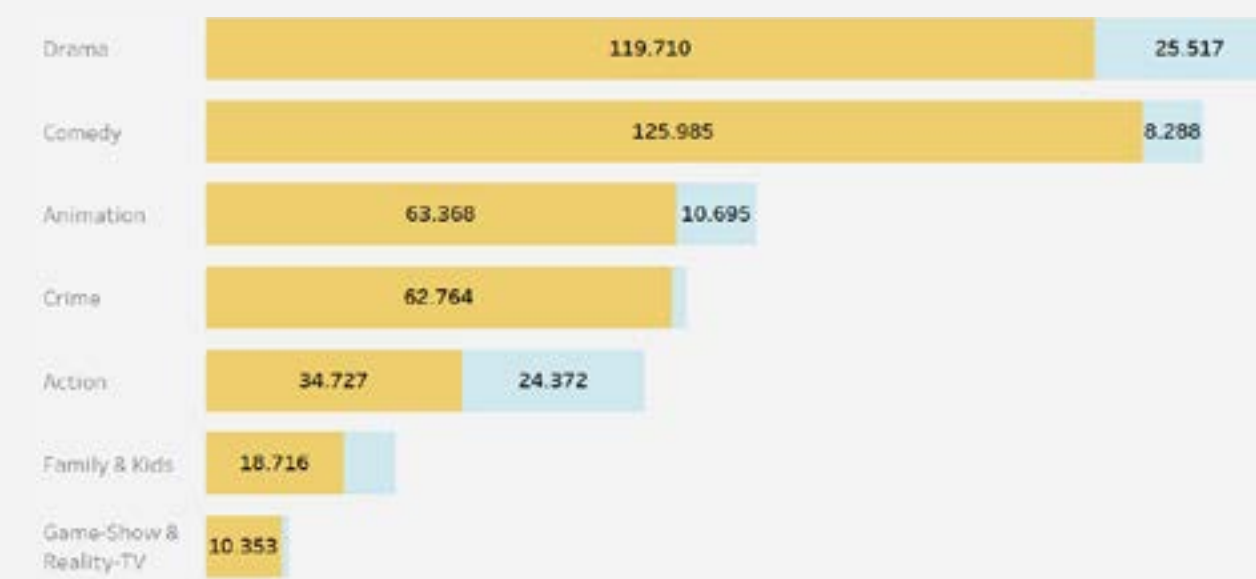
Drama does better than comedy, with 145M streams, thanks to the 99M streams of "Stranger Things". However, comedy consumed on Netflix continues to be the British spectator's favourite TV format, with 126M streams obtained thanks, in great measure, to the contribution of licensed North American comedies. Of the 119M streams registered by Netflix in this genre, almost 100 million come from the Duffer brothers' series, giving drama second position on the platform's ranking.

THE INEXHAUSTIBLE MARKET FOR ANIMATION

With 74M streams, animation on demand becomes the third favourite genre of the top 100 most watched programmes. This figure sends a powerful message to producers and content licensees. It is content that is key to securing engagement with the platform.

TOTAL STREAMS BY GENRES

PLATFORM COMPARATIVE



OTT

- Amazon
- Netflix

streams (.000)

HOT CONTENT IN UK

MR BEAN REVISITED

Fifteen 25-minute episodes were enough for Mr Bean to turn Rowan Atkinson into a cultural phenomenon inside and outside the UK. Later, came the films, and even an animated series. But it was the series that catapulted him to stardom. In this new project, Atkinson shows that far from being outdated, his type of humour is more alive and relevant than ever.

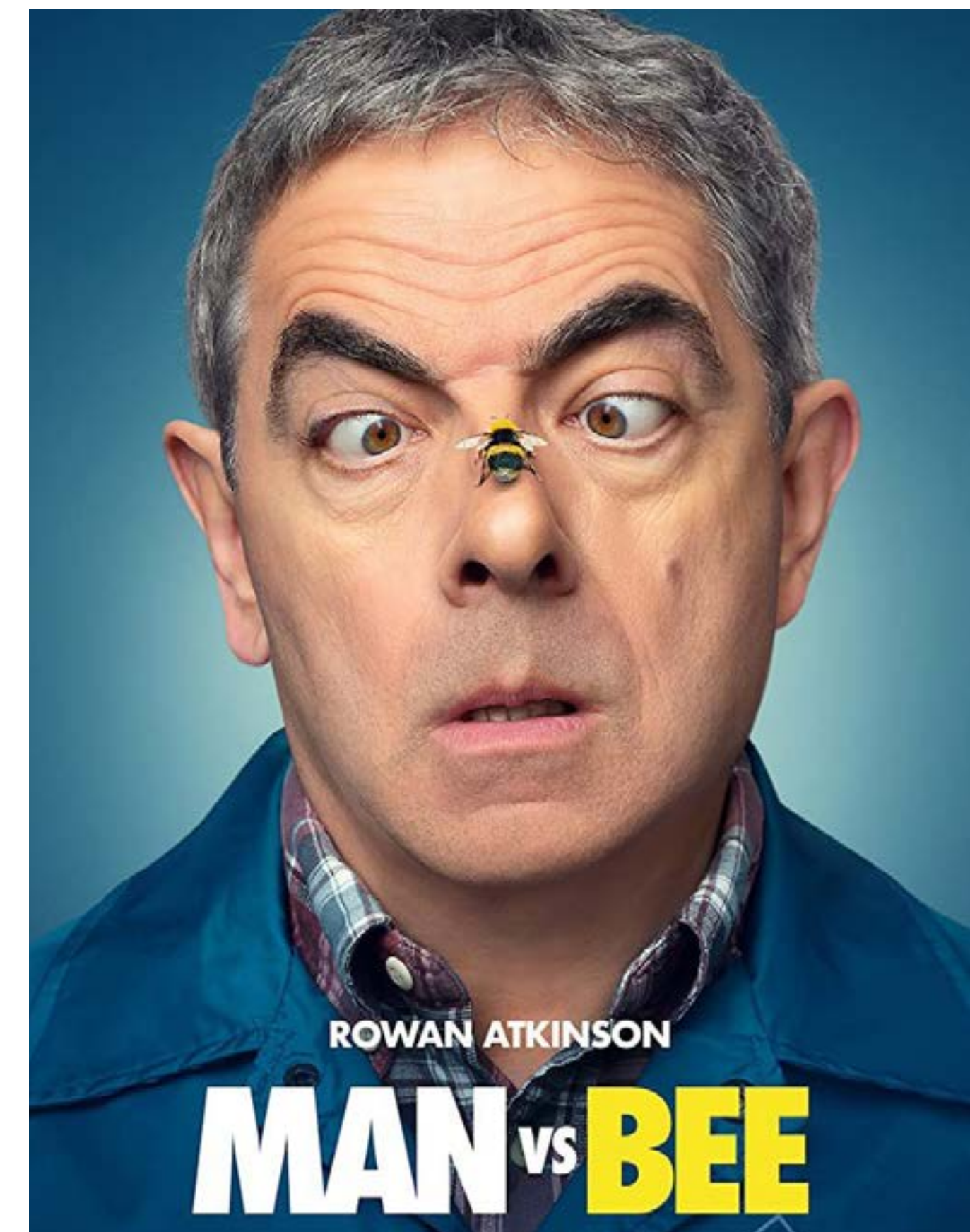
In “Man vs Bee”, he plays Trevor, a run-of-the-mill company employee who takes care of the homes of wealthy clients when they are away travelling. His first mission could not be more difficult. A mansion full of art and technology, a true minefield, a disaster waiting to happen. When a bee enters the mansion and he gets down to the task of evicting it from the premises, tragedy is sparked off...as well as peals of laughter.

British humour and the simplicity of its premise is not the only virtue of “Man vs Bee”. Its format is as well.

Trevor tries, for a full hour and a half, to solve the problem of the bee, which Netflix lays out in 10-minute packages (except for the first one, which is in sitcom format). More than enough time for Atkinson to unfurl all his comedic gifts, pathos, ill-luck and all the wit and inventiveness of the Mr Bean that so thrilled us.

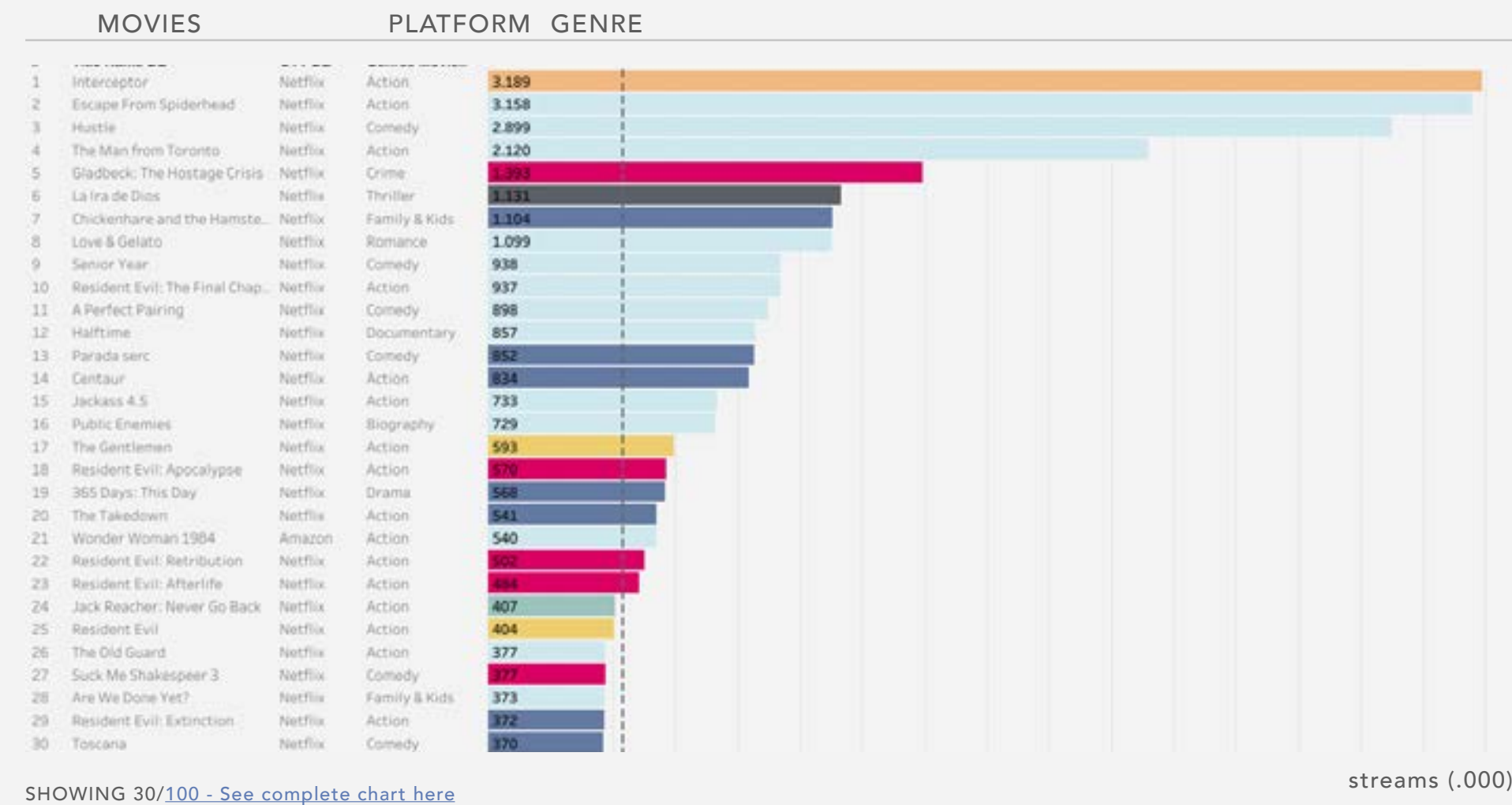
This is another example of how classic television formats fit perfectly into an OTT offer if they can be adapted to the tenets that inform consumption these days. “Man vs Bee” seems made to order for a society that has become very quickly addicted to Reels and Tik Tok.

This comedy is, at the end of the day, a reinterpretation of the Mr Bean’s sketches, with a little bit of the slapstick humour made popular by the Marx brothers and Laurel and Hardy thrown in for good measure. Short, but very effective entertainment, to be seen at home or while you’re out and about.



GERMANY 100 MOVIES | OVERVIEW

TOTAL STREAMS BY MOVIE NETFLIX - AMAZON



SHOWING 30/100 - See complete chart here

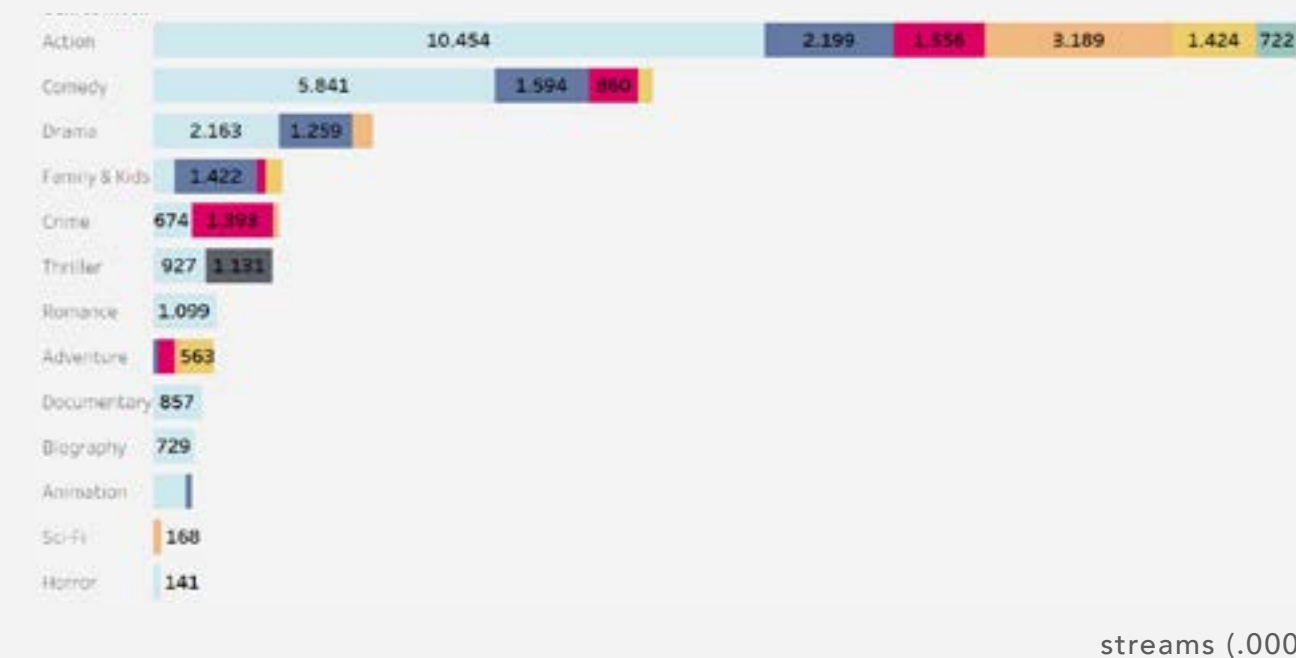
PRODUCTION COUNTRIES



CATALOG SHARE BY COUNTRY NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES NETFLIX - AMAZON



NORTH AMERICAN PRODUCTIONS AT THE HEAD OF THE TOP 100 BUT AN AUSTRALIAN PRODUCTION BEATS THEM TO THE NUMBER ONE SPOT

The European tussle between “Interceptor”, “Escape from Spiderhead”, “Hustle” and “The Man from Toronto” is resolved, in Germany, in favour of the first work. US and Canadian production takes up over half of the Top 100 films in Germany (57%). The rest of the share is distributed mainly among European productions (16%), the UK (9%) and German productions.

GLADBECK CONFIRMS THE WISDOM OF NETFLIX’S BET ON LOCAL DOCUMENTARIES

The documentary that recounts the taking of a bus by some bank robbers in Germany in the 1980s holds fifth position in the Top 100 films reproduced in July. With more than 1.3M streams, it is ahead of global phenomena like the Argentinean product “La ira de Dios”, or the documentary about Jennifer Lopez, “Halftime”.

“HUSTLE” GIVES A FURTHER SHOT IN THE ARM TO THE CONSUMPTION OF COMEDY, WHICH CONTINUES TO BE THE FAVOURITE GENRE IN THE COUNTRY

Comedy continues, however, to be overwhelmingly Hollywoodian, with 5.8M streams. This genre accounts for, in all, 8.5M streams. European comedy isn’t that attractive to the German spectator. In that country, it musters only 1.5M streams.

GERMANY 100 MOVIES | EUROPEAN FOCUS

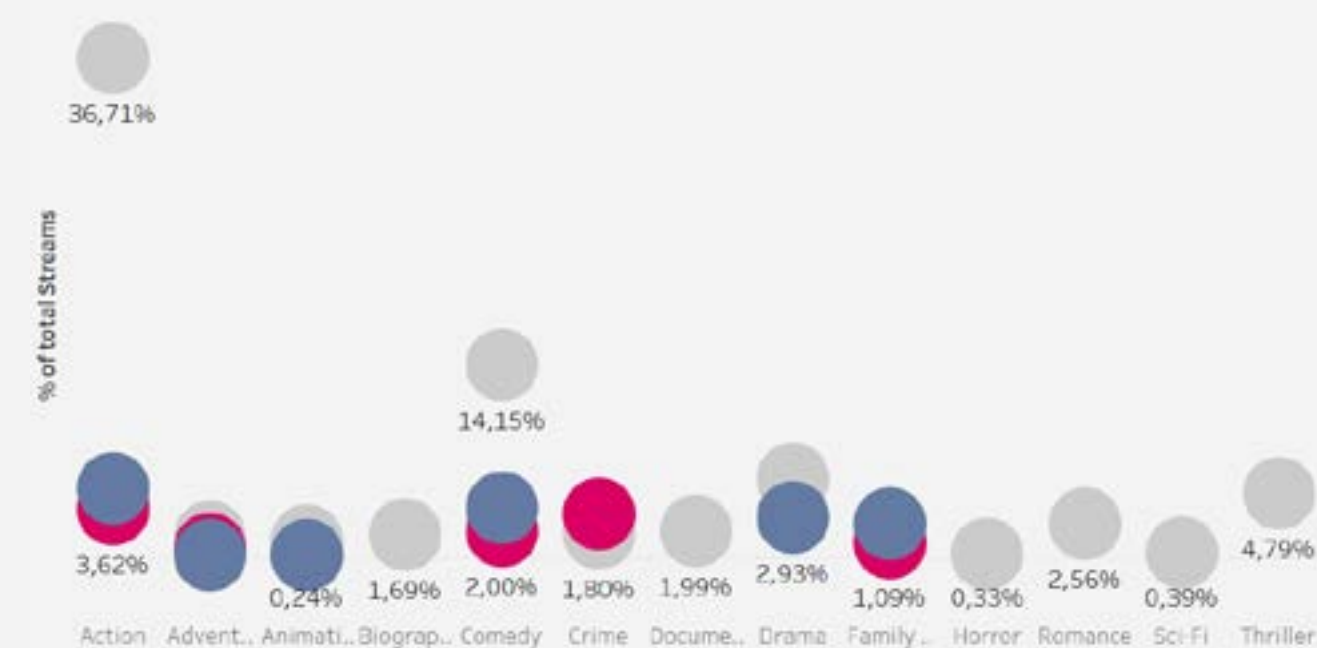
LOCAL AND EUROPEAN MOVIES IN THE TOP 100 NETFLIX - AMAZON



PRODUCTION COUNTRIES



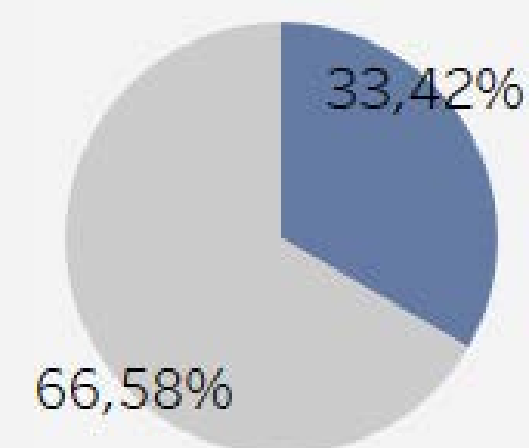
CONTRIBUTION OF LOCAL & EUROPEAN MOVIES TO TOTAL STREAMS NETFLIX - AMAZON



NUMBER OF TITLES BY GENRES NETFLIX - AMAZON

| GENRE | EU | GERMANY |
|---------------|----|---------|
| Action | 5 | 3 |
| Adventure | 1 | 1 |
| Animation | 1 | |
| Comedy | 4 | 3 |
| Crime | | 1 |
| Drama | 4 | |
| Family & Kids | 1 | 2 |

CONTRIBUTION TO DRAMA STREAMS



A GOOD MONTH FOR LOCAL AND EUROPEAN PRODUCTION

June ends with a generally good haul for European production in Germany. Diversity was the feature of the month. Apart from the Gladbeck phenomenon, we find, in the ranking, the Franco-Belgian animation production "Chickenhare and The Hamster of Darkness", the Polish production, "Parada serc" and the Spanish production, "Centaur", which occupy the first four positions on the ranking list, although half of them are below the 1M stream threshold. In all, only six German films manage to make it into the top 20 of local content, which in June saw a marked preference for European content, over local territory content.

ACTION AND COMEDY, THE STELLAR GENRES OF THE SUMMER

There is a general upward tendency in the demand for local production, driven by titles from USA and Canada. They are the genres with the most specific weight in the consumption ranking.

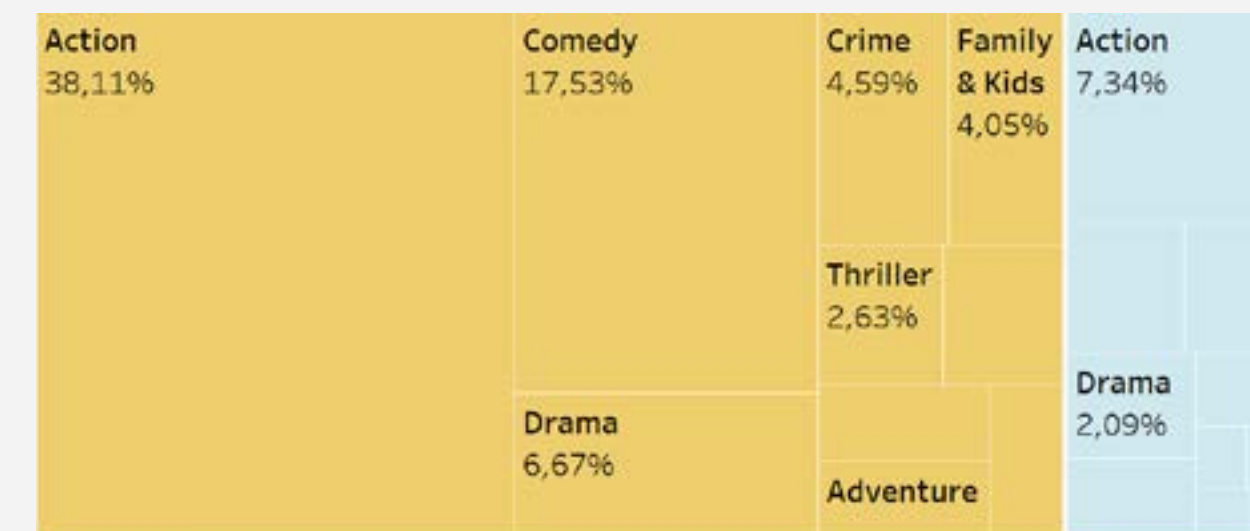
GERMANY 100 MOVIES | SVOD PLATFORMS

TOP MOVIES STREAMS BY GENRES



MOST WATCHED GENRES

SHARE BY PLATFORM



ACTION COMFORTABLY LEADS THE RANKING BY GENRE, LEAVING LITTLE ROOM FOR COMEDY AND DRAMA

The difference between the consumption of action content and the consumption of the rest of the genres is significant. Action contents got 16.3M streams, more than double the figure for comedy and more than eight times the figures for drama.

HOLLYWOOD CLEARLY MARKS ITS TERRITORY

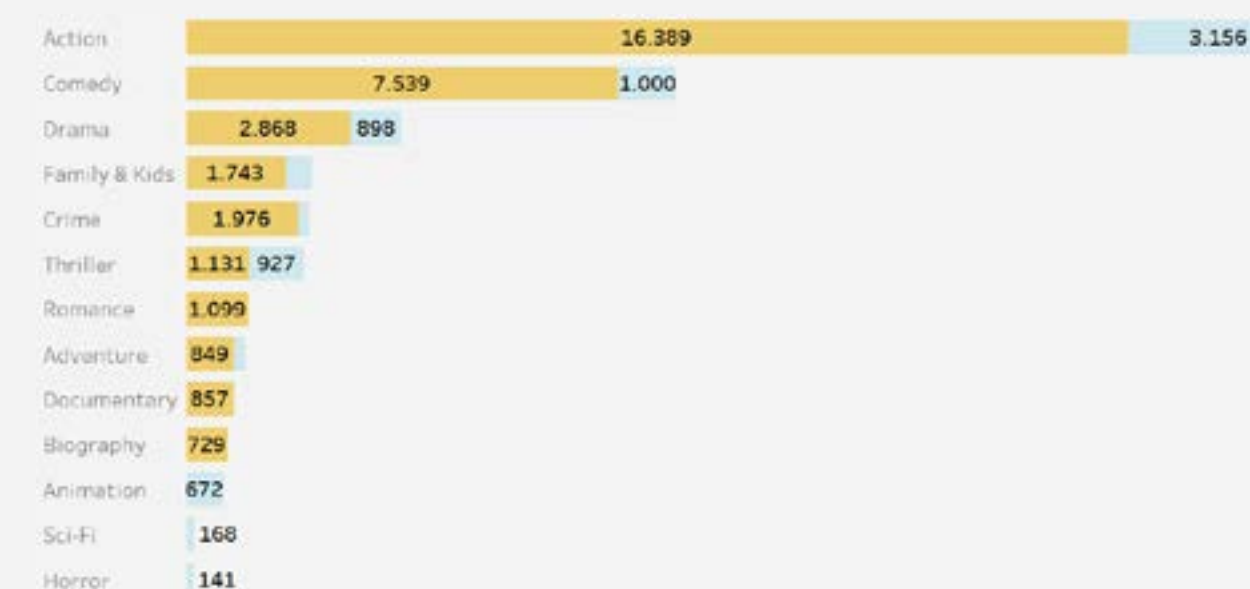
The strong whiff of productions coming from USA and Canada ("Escape from Spiderhead", "Hustle" and "The Man from Toronto") clearly shows where preferences lie in terms of genres when it comes to contents releases. Catalogues also find a place for themselves in certain categories, such as Adventure, Crime and Animation.

AMAZON LOSES IN COMPARISON WITH NETFLIX BUT LEADS IN CERTAIN GENRES

Amazon is still incapable of countering the cultural impact of Netflix releases, which always become, month after month, major events, with a strong concentration of streams. It does manage, though, to find a place in other less saturated genres, such as animation, science fiction and horror.

TOTAL STREAMS BY GENRES

PLATFORM COMPARATIVE



streams (.000)

OTT

- Amazon
- Netflix

GERMANY 100 SHOWS | OVERVIEW

TOTAL STREAMS BY SHOW NETFLIX - AMAZON



SHOWING 30/100 - See complete chart here

streams (.000)

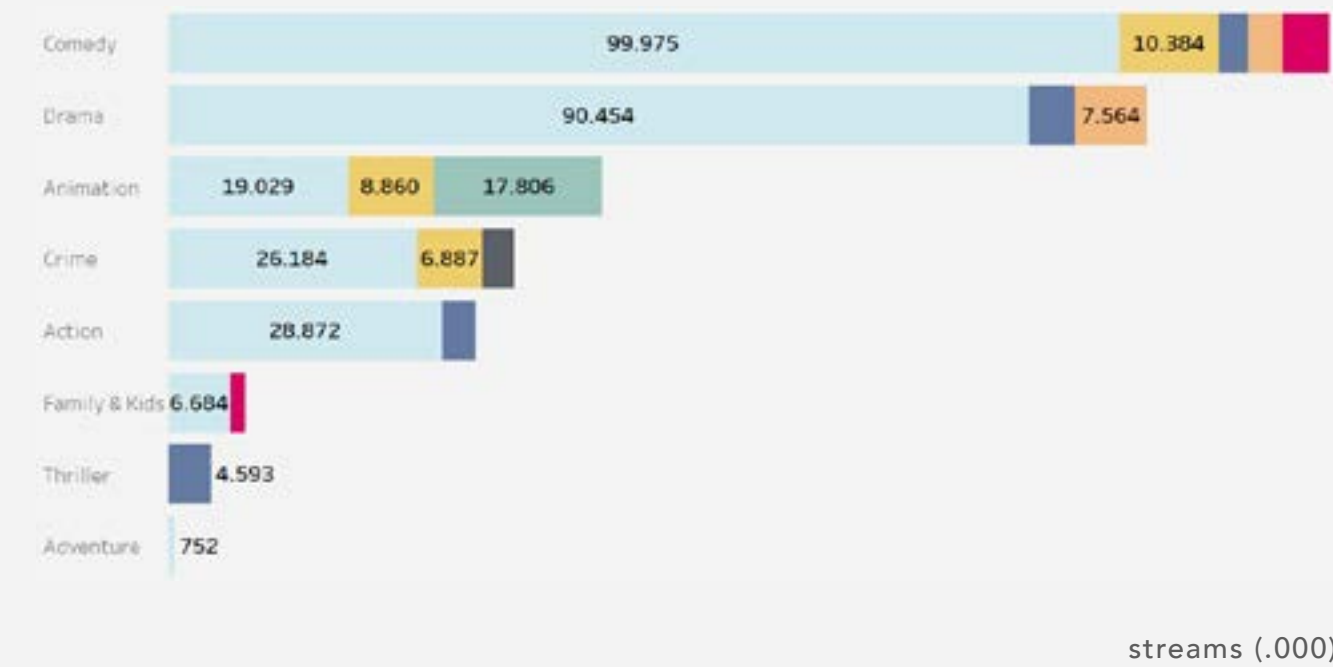
PRODUCTION COUNTRIES



CATALOG SHARE BY COUNTRY NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES NETFLIX - AMAZON



streams (.000)

RELEASES, TUSSELLING WITH CATALOGUE CONTENT

Not many release contents manage to find a place in the Top 100 of the most reproduced programmes of the month of June. There is, in fact, an unusual phenomenon: a classic sitcom ("The Big Bang Theory") records figures close to those of the month's stellar release (the fourth season of "Stranger Things"). Two other catalogue situation comedies ("Two and a Half Men" and "Brooklyn Nine-Nine") move up towards the Top 10, hence comedy unseating drama as the favourite genre in the 100 most reproduced programmes of the month.

NORTH AMERICA HOGS TELEVISION CONTENT CONSUMPTION

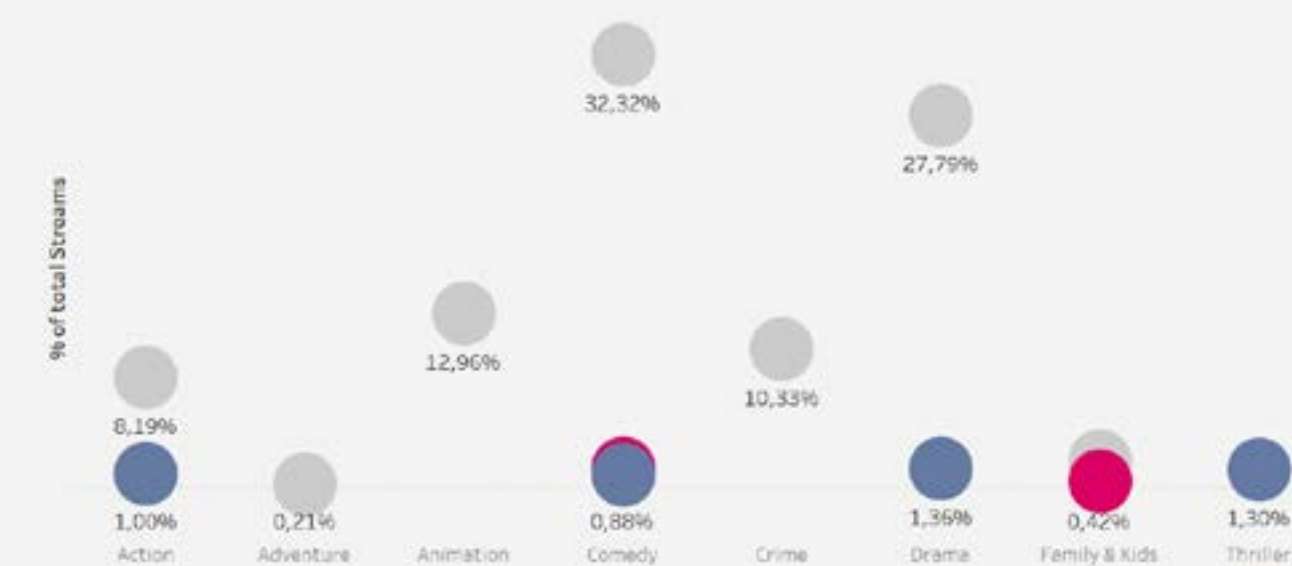
The decisive contribution of catalogue contents explains the overwhelming predominance of North American productions in the Top 100, in sitcoms as well as long dramas ("The Good Doctor", "The Blacklist").

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



GERMANY CONTINUES TO BE THE MOST DIFFICULT MARKET FOR LOCAL EUROPEAN PRODUCTION

The poor returns for local productions illustrate German spectators' low interest in fare that doesn't come from USA/Canada.

TWO NETFLIX GLOBAL PHENOMENA ("INTIMIDAD" AND "WELCOME TO EDEN") SHOOT INTO THE TOP 3

The global machinery it is able to deploy for the promotion of releases continues to be one of the main reasons for which Netflix manages to get programmes into different countries, overcoming cultural and linguistic barriers.

Such is the strength of Anglo-Saxon contents, for release as well as catalogue content, that the battle for European productions in a category as prosperous as drama is virtually lost from the beginning. The share of European dramas within the total amount of drama content consumed in Germany shows a new maximum low: 4.65% of total reproductions.

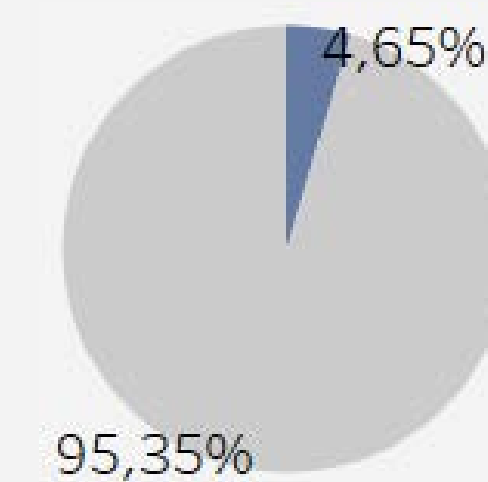
PRODUCTION COUNTRIES

- Europe
- Germany
- Others

NUMBER OF TITLES BY GENRES NETFLIX - AMAZON

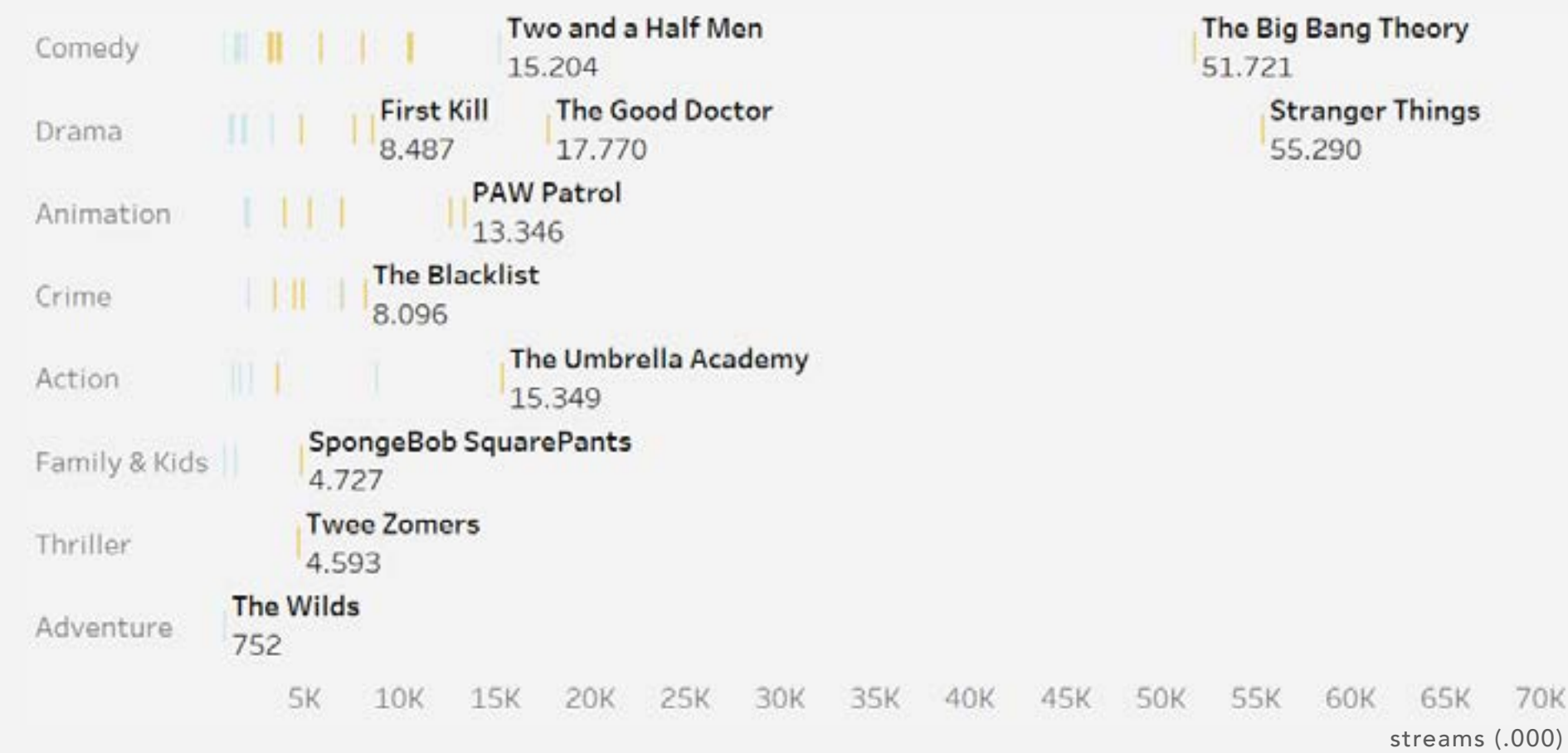
| GENRE | EU | GERMANY |
|---------------|----|---------|
| Action | 1 | |
| Comedy | 1 | 2 |
| Drama | 1 | |
| Family & Kids | | 2 |
| Thriller | 1 | |

CONTRIBUTION TO DRAMA STREAMS

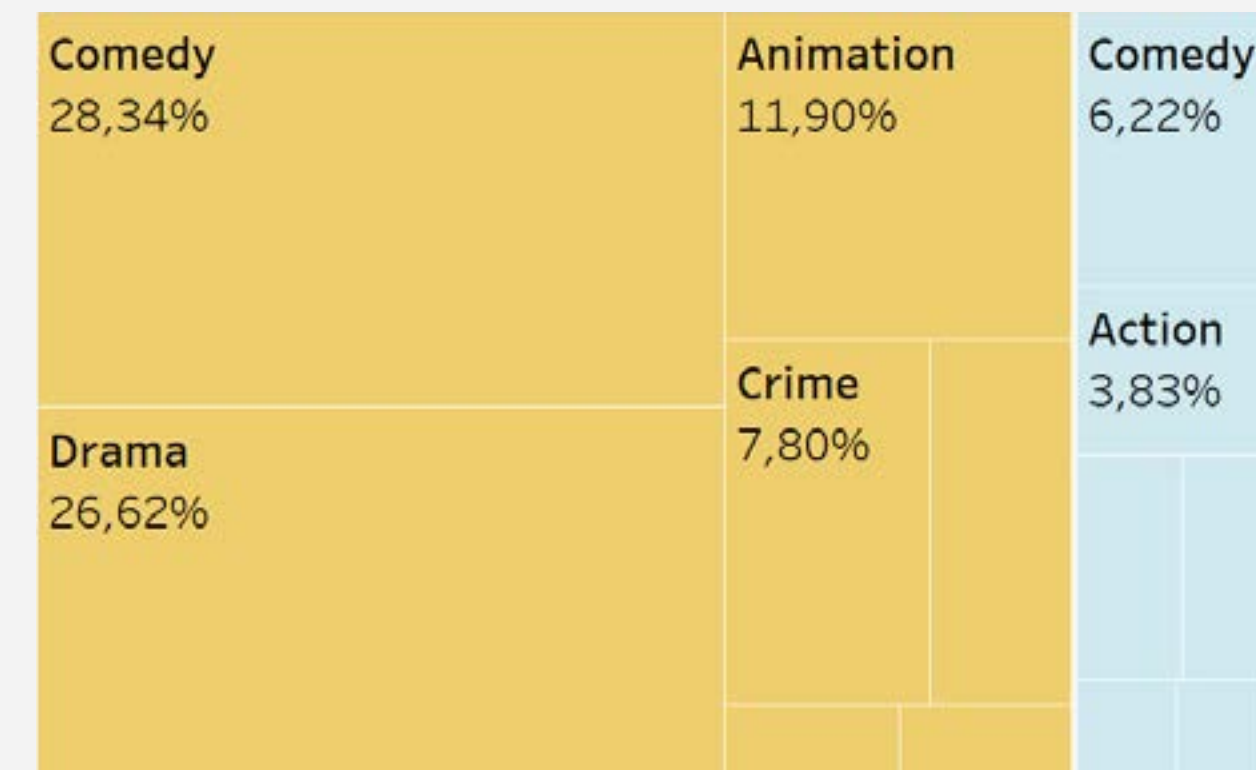


GERMANY 100 SHOWS | SVOD PLATFORMS

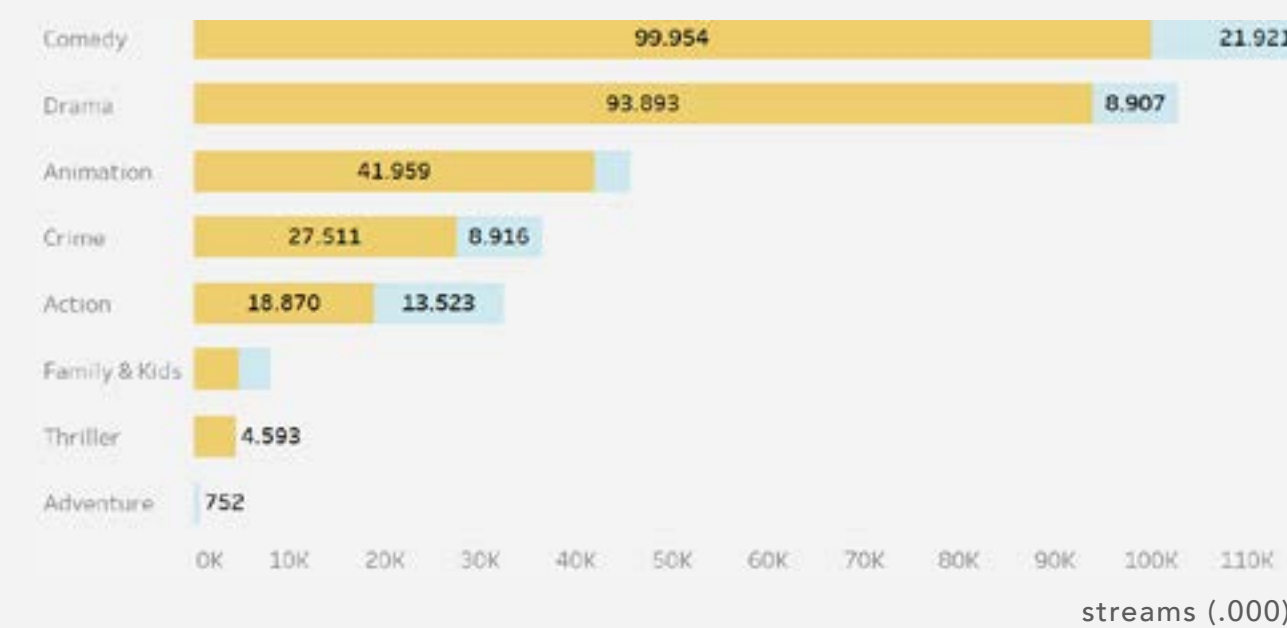
TOP SHOWS STREAMS BY GENRES



MOST WATCHED GENRES SHARE BY PLATFORM



TOTAL STREAMS BY GENRES PLATFORM COMPARATIVE



OTT

- Amazon
- Netflix

SITCOM HASN'T DIED. LONG LIVE SITCOM

Justification for the multi-million dollar bids for classic sitcoms by platforms can be found when we look at the behaviour of audiences in certain territories. Germany, for instance. Consumption is so intense that it represents 28.34% of the total amount of streams for the month, going ahead of drama (which had a super-content product this month: "Stranger Things"). The weight of comedy is also significant in the case of Prime Video, with the biggest share of the month, albeit over 20 points behind Netflix.

CATALOGUE STRENGTH IN OTHER GENRES

Drama and children's content also get a decisive shot in the arm from catalogues, whose figures original production is still very far from attaining.

HOT CONTENT IN GERMANY

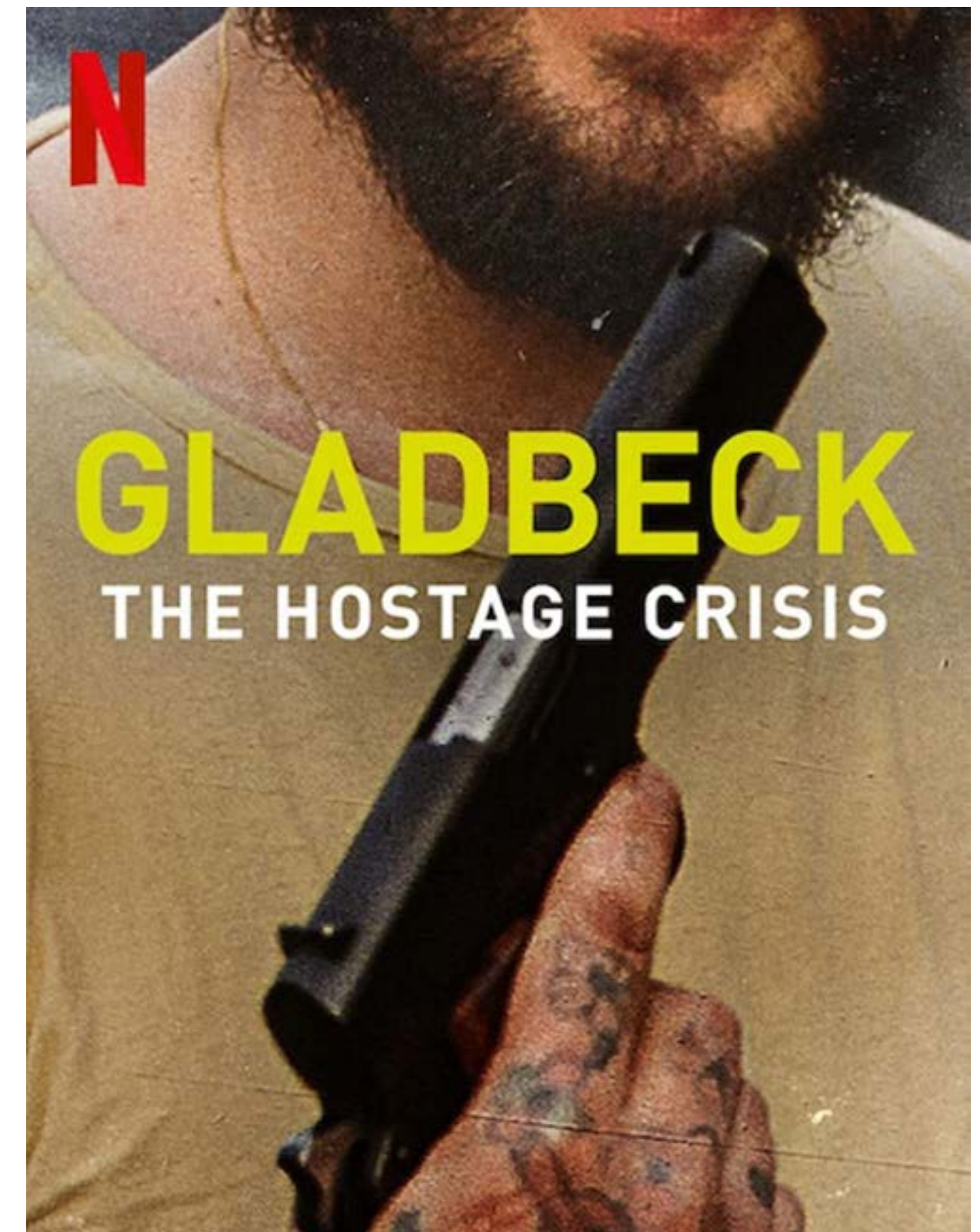
LOCAL DOCUMENTARY, KEY TO PLATFORMS' CONSOLIDATION STRATEGY IN TERRITORIES

In 1988, Hans Jürgen Rösner and Dieter Degowski robbed a bank in Gladbeck, Germany. Following the hold-up, there was the taking of a bus, in which hostages were held, giving rise to an enormous media spectacle with fatal consequences. Different German media became embroiled in the scandal, blinded by their obsession to get the best exclusives and attract the greatest amount of viewers possible to their respective networks. They fell into a dangerous spiral with the kidnappers, which eventually resulted in several people losing their lives. The Gladbeck case became a dark chapter in German journalism, and led to deep code of ethics changes.

Platforms do not live by glocal content alone. Local content also is a key strategic tool for platforms. Not only do they help to bolster the relationship with the creative communities of the different territories, they also help to make local audiences faithful to known content. When a genre as popular as True Crime is added to this formula, the overall result is usually very positive. Hence the success of "Gladbeck".

The fact that platforms make consumption easy for customers has turned what until relatively recently was a minority genre into content that is now heavily demanded. Local themes, as well, help to bring a foreign brand closer to the spectator, who, gradually, makes it part of his routine, along with the other media he/she normally consumes.

The spectator demands, more than ever, diversity and compelling stories, elements that this format satisfies on both counts. Local documentaries also are an interesting door towards what platforms already have in their supply tanks, especially at a time when the post-pandemic hangover has left audiences thirsting for new things.



GLOBAL TAKES

- 1 / **Netflix is perfecting one of its stellar formats: the domestic blockbuster.** This type of releases is marked by seasonality, similar to that of the majors. They are trying, with them, to take to households the roadmap followed by the industry during the summer months. Popular genre titles (comedy and action), with skilfully woven storylines, well-known faces, simple premises and important marketing campaigns. Success, however, is quite fleeting. Streaming doesn't succeed in keeping titles beyond the first weeks after release.
- 2 / **A well-known face and a universal theme are the two pillars of the global success of the month: "Intimidación"** This Netflix original becomes one of the titles that has travelled best to other European territories. Although there can be no doubt about the effect of the participation of an acclaimed actress (Itziar Ituño, Lisboa in "Moneyheist") it is the theme dealt with that has succeeded in breaking down the geographic and linguistic barriers that necessarily come with the origin of the production. Fiction on global platforms needs to be rooted in universal themes in order to multiply the points of contact with spectators of different cultural traditions.
- 3 / **Netflix's explosive 30-day life vs Amazon's Shelf Life:** while standing still at Netflix's top after one month seems complicated even for endorsed hits, with Amazon it is the very opposite: theatrical movies come and stay performing modestly but very steadily. It is the case for titles like "El Sustituto", "García y García" and "Padre No hay Más que Uno", that have been keeping a hot spot in Amazon Spain for weeks. Is Amazon a player vital to dialogue about those European films that could perform better on the giant streamers if better promoted?
- 4 / **The high volume of new releases, along with the abundance of catalogue references** is drawing up a consumption map that, more than fragmented, is becoming polarised around the titles that platforms choose to heavily bet on in any given month. The distance between the first positions on the ranking list and those in the middle and at the bottom, is enormous, which confirms that the spectator's attention does not depend so much on his/her own searches and those of his affinity circles, as much as it does on the programming strategy each platform chooses to follow from month to month.
- 5 / **Third party licensed content continues to sharply polarise the consumption of TV series in the United Kingdom and Germany,** of the territories analysed the two most hermetic to European content. The specific weight of TV dramas that have been on air for a long time and of classic sitcoms, significantly reduces the demand for local and European content. The attractiveness of programmes that have been proven success over many seasons and many episodes, significantly reduces the curiosity of audiences, who are much more receptive to foreign content as far as films are concerned, than they are to TV fiction.
- 6 / **Documentary becomes a key "close content" for the consolidation of platforms in the different territories.** First of all, for a basic question of access. The facility for consumption provided by platforms to customers has turned what, until relatively recently, was a minority genre, into one for which there now is high demand. The demand for documentaries has not ceased to rise after the pandemic. The spectator demands diversity and compelling stories, more and more so. And those are two elements that this format provides.
- 7 / **Italian film "Odio l'estate" offers a new case study that confirms the decisive effect that a good theatrical debut can have for commercial exploitation in the remaining windows.** A movie theatre release, with a good marketing and promotion campaign, stir up the necessary buzz among audiences and leave a memory that serves to raise the demand from audiences when they reach their streaming service as well. Licensing pre-agreements for platform contents now are a key strategic element in the film distribution plan, as TV sales windows were in their day.
- 9 / **The gap between Netflix and Amazon continues to be substantial.** Netflix monopolises consumption via streaming in practically all the territories analysed. This is a direct consequence of the huge volume of releases and the strong promotion done for such releases. Amazon is yet to adequately place original content with good streaming figures. The recent redesign of the Prime Video app and the imminent release of the "Lord of the Rings" series could go some way towards significantly improving Amazon's figures.
- 10 / **Streaming has found a veritable gold mine in classical TV formats.** This is the main reading we can extract from the talent show "Rhythm + Flow", the French adaptation of the North American programme of the same name, in which three judges choose the future rap star. Although non-fiction still represents a very small proportion in platforms' catalogues, they are clearly showing that they have an important role to play when it comes to keeping audiences. The fact that resources are being allocated to the development of this type of programmes, associated with more traditional television, seems to indicate one clear objective: tying down part of the very high demand for this type of television formats and consolidating its position in households as services that can satisfy very diverse audiences.

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BRIDGING THE DATA GAP | JUNE 2022

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