

THINK DATA.

BRIDGING THE DATA GAP

APRIL 2023



THINK DATA FOREWORD

BRIDGING THE DATA GAP

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The Content Market: There's Not One Single Trend, but Several Constant Tensions

In the era of fast-paced content consumption, it is difficult to identify a single trend that dominates the audiovisual market. It is not a monolith. Sometimes, individuals in the industry try to generalize the situation with preconceived notions like “streamers are now focusing on True Crime” or “they are not commissioning new documentaries.” However, when we analyze our data and the diverse slate of streamers, we realize that they are actively seeking a wide range of content across various genres, locations, and talent. They aim to serve both mainstream and niche audiences, ensuring they have the right product, produced in the right country, with the right talent and genre mix for each audience cluster.

“**We have observed that no single show can bear the burden of the highly competitive top 100. Instead, it requires a combination of shows targeting different demographics, such as kids, young adults, adults, women, crime, thriller, horror, and documentary.**”

With the right mix, released at the right time, and featuring compelling, thought-provoking content, leading streamers strive to provide the best possible service to their audience. Netflix, in particular, has excelled in this area. Before the emergence of Disney+, the company consistently dominated over 75% of the top 100 with a diverse selection of shows and films that catered to distinct audiences.

In this report, we observe significant diversity in the market due to the presence of Disney+ and HBO Max. This allows us to witness a multi-front battle and experience the various tensions at play. Streamers like Netflix appear to be more focused on young adults and new voices, while Disney+ targets families. This competition between the two streamers has reduced Amazon's market share to a minimum. However, Amazon Prime Video continues to fiercely compete by emphasizing local content, comedy, and drama. The media conglomerate led by Mickey Mouse is currently strategizing on increasing its cash flow by promoting their ad-supported tiers and licensing content to other companies. Additionally, they are aiming to attract young adult audiences through their merger with

Hulu. Each streaming service has its own unique global-local strategy, ultimately leading to a diverse landscape.

Disney is not the only company focusing on licensing for cash flow; Warner Bros. Discovery (WBD) recently struck a deal with Netflix to license HBO content in the US, marking a significant development after a gap of over ten years. Interestingly, in Europe, some of Netflix's most popular shows, such as “Big Bang Theory” and “Brooklyn Nine-Nine,” are labeled as WBD productions and continue to dominate the charts. CEO David Zaslav aims to achieve sustainability by the end of 2023 and even generate \$1 billion in profit by 2025. For more insights, refer to The Wrap.

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While algorithms are often criticized for homogenizing content, the binge-watching culture is driving audiences to crave new, diverse, and bold proposals. This new tension is also influencing the international sales market, where buyers carefully select content for future distribution. At Cannes 2023, a [Screen article](#) featured interviews with several French sales agents, who are renowned for their leadership in independent content worldwide. Many of these agents agreed that buyers are actively seeking something fresh and innovative. Could they be influenced by the streaming culture?

“Buyers are most of all looking for films that buzz, said Elle Driver’s Fontan Tessaur. “Concepts that really attract attention. People are getting sick of uniform content”. Charades’ Comte agrees: “Distributors are looking for new voices, younger voices. Not just films, but films with an edge to bring younger audiences into theatres”

Delaunay of Memento points to Bajoli’s Un Certain Regard features Omen and Vladimir Perisic’s Critics’ Week entry Lost Country. “They are both stories about young people, written by young people. They are authentic and this type of film is really trending right now among buyers. Buyers and audiences are looking for films like these that really pack a punch”. Both films have been top sellers at the market and “are really motivating both European distributors and US and UK buyers”.



If all these streaming giants are vigorously competing against each other and actively seeking cost-effective and innovative, diverse content, how can European independent players lose out? The feast is getting complex but there should be food for everyone.

Get to nourish your data guts decisions by reading this new report!

Your analysts,
Lola, Celia, Sarah

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



HURRICANE DISNEY±

BY ELENA NEIRA



It has not yet celebrated its fourth anniversary, and its dominance in the digital entertainment sector is already indisputable. Disney+ has achieved rapid consolidation in all the markets it has entered, thanks to its prestigious intellectual property, the resonance of its brand, and absolute leadership in the children and family niche.

In terms of content, Disney+ operates as a major, although it has also created space for local content. The company is very aware of its importance, especially in Europe, where community legislation requires a minimum quota of content produced in the catalogs of OTT platforms. Disney+'s glocal strategy is still in the maturation phase. Initially, it has a significantly more challenging starting point than its competitors. The consumption environment is filled with prestigious references, making it very difficult for content to stand out in the eyes of the viewer. When combined with the moderation in investment figures for original content in Europe and the delicate situation of the company

(which urgently needs to generate profits in its direct-to-consumer operations), it is highly probable that this may not be the most viable company for selling local projects.

At least for now, glocal is not the main driver of consumption. According to data from this month's Think Data report, it is the classic library titles (such as "The Simpsons" or "How I Met Your Mother") and iconic titles from Pixar or The Walt Disney Company that dominate in terms of views. While Netflix focuses on the discovery, Disney opts for the guarantee of the known and the familiar. Commercial successes rewatches, and the expansion of intellectual property are the strategic pillars of this company.

Disney+ is reshaping the streaming market thanks to the speed at which it has gained market share, largely due to its aggregation policy with telecommunications operators. It serves as the wildcard platform to the more generalist offerings provided by other services (such

as Netflix, Prime, or HBO Max). Moreover, it boasts high retention rates. Its pricing policy and the quality content the company offers help to compensate for the limited rotation of premieres and its focus on weekly releases.

Disney faces a significant challenge ahead: to achieve profitability by 2024. Many analysts believe that it will be then when the platform will leave its comfort zone and strengthen its offering aimed at a more adult audience, to whom the current offering is targeted under the Star brand. That could be the definitive boost to promote other types of productions and become a solid alternative for creators to pitch their ideas.

Elena Neira

La Otra Pantalla | Guest Analyst of the Month

SPAIN 100 MOVIES | OVERVIEW

TOTAL STREAMS BY MOVIE NETFLIX - AMAZON

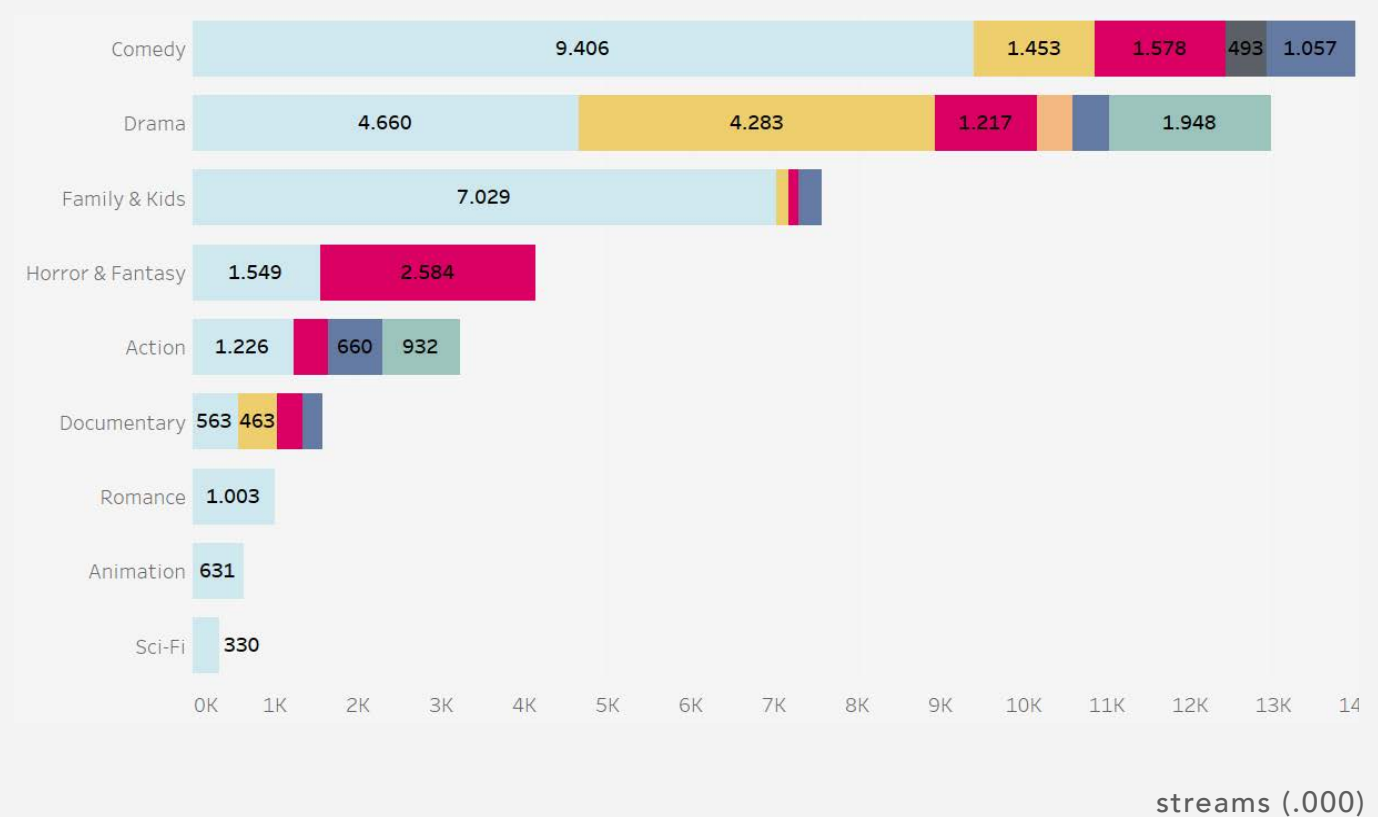
	MOVIES	PLATFORM	GENRE	STREAMS
1	Fenómenos	Netflix	Horror & Fantasy	2,584
2	The Last Kingdom: Seven Kings Must Die	Netflix	Drama	2,558
3	Murder Mystery	Netflix	Comedy	1,691
4	Chupa	Netflix	Family & Kids	1,459
5	Operation Fortune: Ruse de Guerre	Amazon	Comedy	1,453
6	Hunger	Netflix	Drama	1,366
7	Grown Ups	Netflix	Comedy	1,231
8	A Tourist's Guide to Love	Netflix	Romance	1,003
9	Kill Bok-soon	Netflix	Action	932
11	Tenet	Netflix	Drama	903
11	Infinite	Netflix	Drama	763
11	Luther: The Fallen Sun	Netflix	Drama	714
11	AKA	Netflix	Action	660
11	Grown Ups 2	Netflix	Comedy	650
11	Exorcist: The Beginning	Netflix	Horror & Fantasy	643
11	Rumble	Netflix	Family & Kids	554
11	One More Time	Netflix	Comedy	548
11	John Wick: Chapter 2	HBO Max	Action	278
11		Netflix	Action	262
21	Five Feet Apart	Netflix	Drama	528
21	Todos lo hacen	HBO Max	Comedy	495
21	Fuga de Reinas	Netflix	Comedy	493
21	Are You	Netflix	Comedy	481
21	Ophelia	Netflix	Drama	478
21	Lobo Feroz	Netflix	Drama	476
21	Black Sea	Netflix	Documentary	463
21	The Secret Life of Pets 2	Netflix	Family & Kids	458
21	¡A todo tren! Destino Asturias	Amazon	Comedy	442
21	Something's Wrong with Rose	Amazon	Horror & Fantasy	435
31	Paw Patrol: The Movie	Netflix	Family & Kids	434
31	Chokehold	Netflix	Drama	429
31	Maixabel	Netflix	Drama	426
31	The Way Back	Netflix	Drama	415
31	Sky High	Netflix	Action	411
31	Jerry and Marge Go Large	Netflix	Documentary	389
31	Playing God	Amazon	Comedy	377
31	Frozen	Disney+	Family & Kids	373
31	Marmaduke	Netflix	Family & Kids	368
31	Mighty Morphin Power Rangers: Once & Always	Netflix	Family & Kids	367
41	Noah	Netflix	Drama	350

SHOWING 40/100 - [See complete chart here](#)

CATALOG SHARE BY COUNTRY NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES NETFLIX - AMAZON



COMEDY, HORROR & FANTASY CAPTURE THE SPANISH AUDIENCE

Both genres have experienced significant growth this month, capturing 31 percent and 9 percent of the market share, respectively. The Comedy genre is greatly supported by "Murder Mystery" and "Murder Mystery 2," which are also driving streams from the USA & Canada, a production zone that had seen a decline in streams over the past two months.

"Fenómenos" is making waves in the Horror & Fantasy genre. It is the only local film that appears in the Top 20. Based on a true story and directed by Carlos Therón ("Operación Camarón" and "Fuga de Cerebros 2"), the movie has amassed 6.7M views across all markets.

UK MAINTAINS IMPRESSIVE MOMENTUM

With just eight titles, the UK commands 14 percent of the streaming market with hits like "The Last Kingdom: Seven Kings Must Die", "Operation Fortune: Ruse de Guerre," and "Luther: The Fallen Sun." Since November, it has consistently been the second most-streamed production zone, trailing only behind the USA & Canada.

PRODUCTION COUNTRIES: Usa & Canada Europe Spain Asia UK Latam Other

SPAIN 100 MOVIES | EUROPEAN FOCUS

LOCAL AND EUROPEAN MOVIES IN THE TOP 100

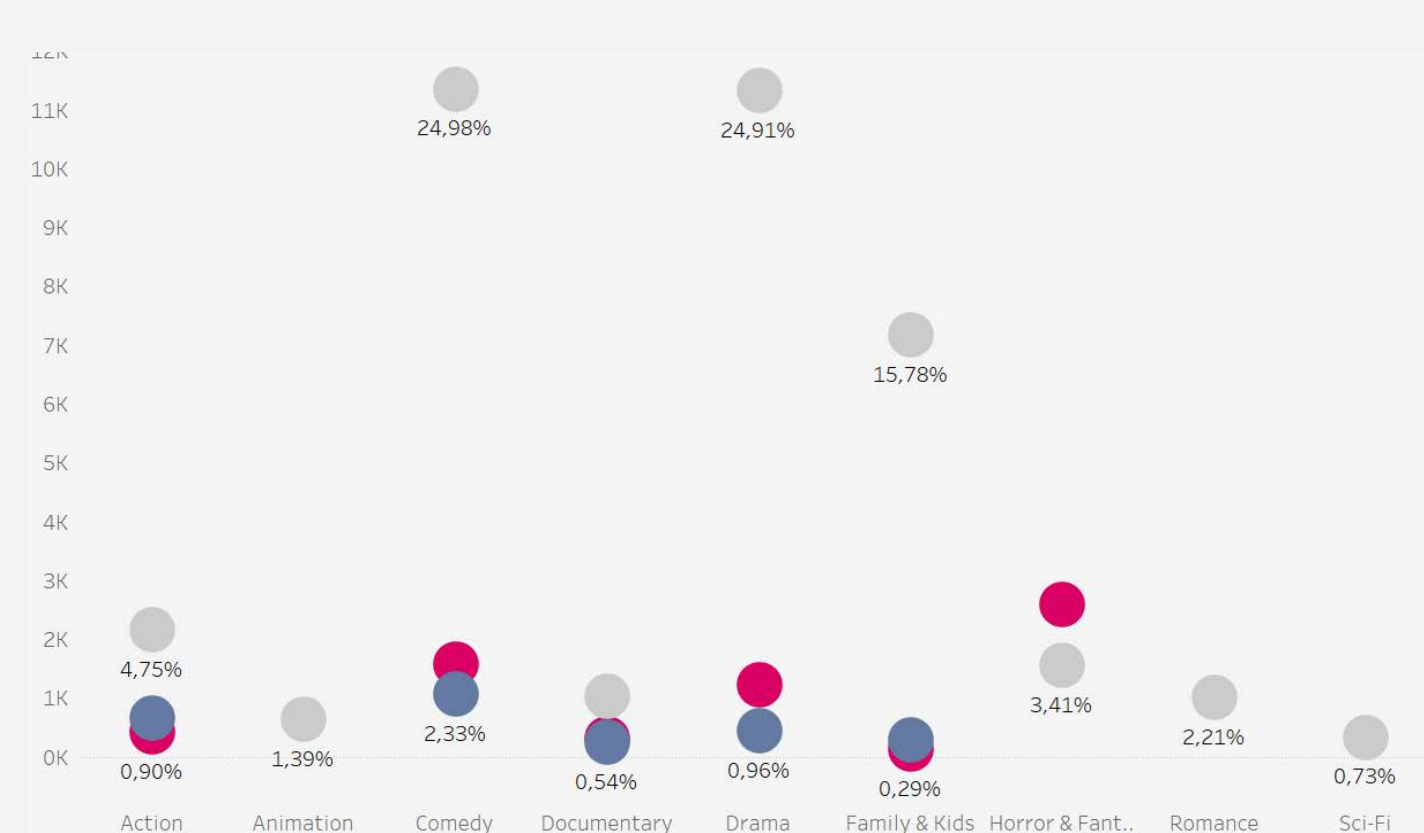
NETFLIX - AMAZON

MOVIES	PLATFORM	POSITION	GENRE	STREAMS
1 Fenómenos	Netflix	ES	Horror & Fantasy	2,584
2 AKA	Netflix	FR	Action	660
3 One More Time	Netflix	SE	Comedy	548
4 Todos lo hacen	HBO Max	ES	Comedy	495
5 Are You	Netflix	ES	Comedy	481
6 Lobo Feroz	Netflix	ES	Drama	476
7 ¡A todo tren! Destino Astu..	Amazon	ES	Comedy	442
8 Maixabel	Netflix	ES	Drama	426
9 Sky High	Netflix	ES	Action	411
10 Infiesto	Netflix	ES	Drama	315
11 The Pope: Answers	Disney+	ES	Documentary	304
12 Luca	Disney+	IT	Family & Kids	277
13 Era ora	Netflix	IT	Comedy	266
14 Tonight You're Sleeping w..	Netflix	PO	Drama	257

SHOWING 14/19 - [See complete chart here](#)

CONTRIBUTION OF LOCAL & EUROPEAN MOVIES TO TOTAL STREAMS

NETFLIX - AMAZON

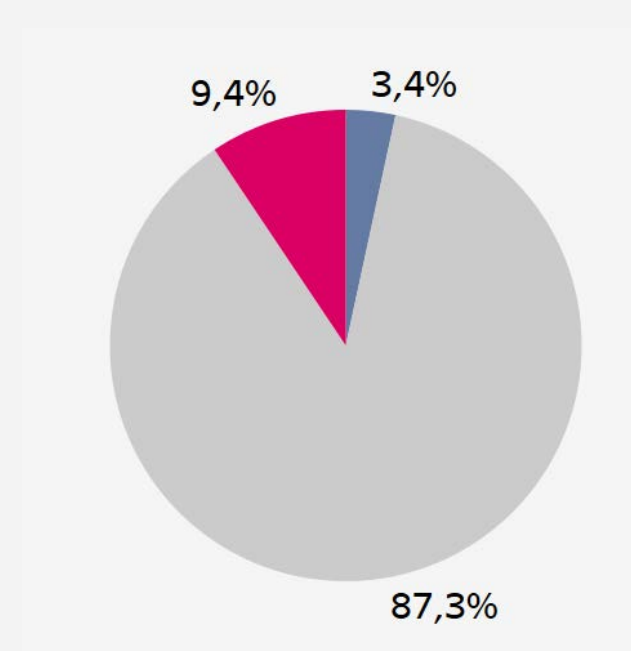


NUMBER OF TITLES BY GENRES

NETFLIX - AMAZON

GENRE	EU	SPAIN
Action	1	1
Comedy	3	4
Documentary	1	1
Drama	2	3
Family & Kids	1	1
Horror & Fantasy		1

CONTRIBUTION TO DRAMA STREAMS



PRODUCTION COUNTRIES:

Europe Spain Others

LOCAL MOVIES DROP SOMEWHAT

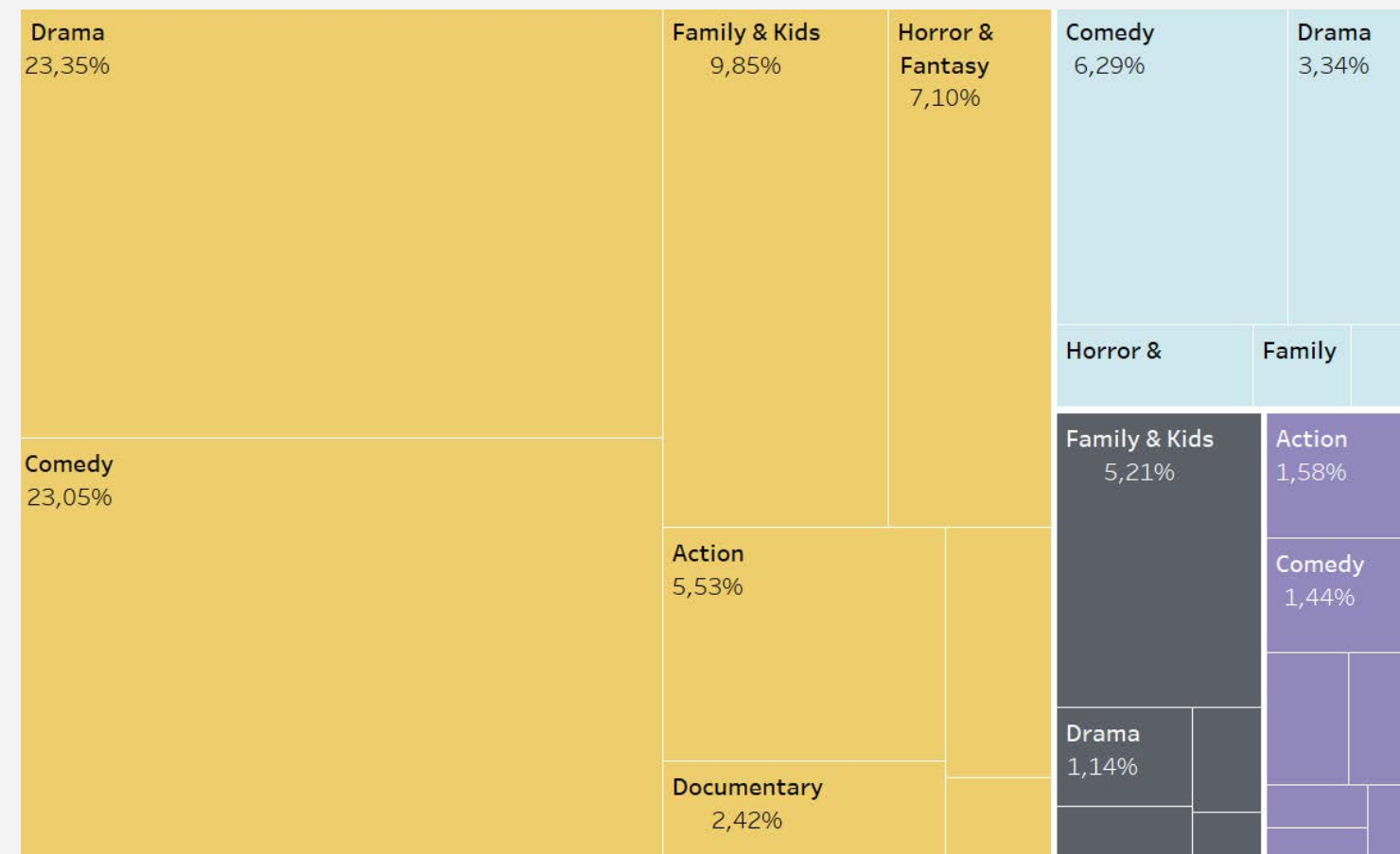
With 13.7% of the share with only 11 titles, Spanish movies have fallen in comparison with last months but still perform better than average. The movie "Are You" has seen remarkable success, accumulating a total of 8.1M streams across all markets since last month. "Maixabel" made its debut on Netflix at the end of the month and has quickly risen to prominence on the Spanish list. The film was successfully released in cinemas in 2021 obtaining more than 3M in the box-office and now has secured a spot on the Top #10 Most Streamed Movies three times, as confirmed by Netflix's official numbers. "Todos lo Hacen" and "Con Quién Viajas" are both directed by Hugo Martín Cuervo and distributed by A Contracorriente. They have achieved 495K and 160K streams respectively.

FRENCH AND SWEDISH PRODUCTIONS CLAIM TOP SPOTS

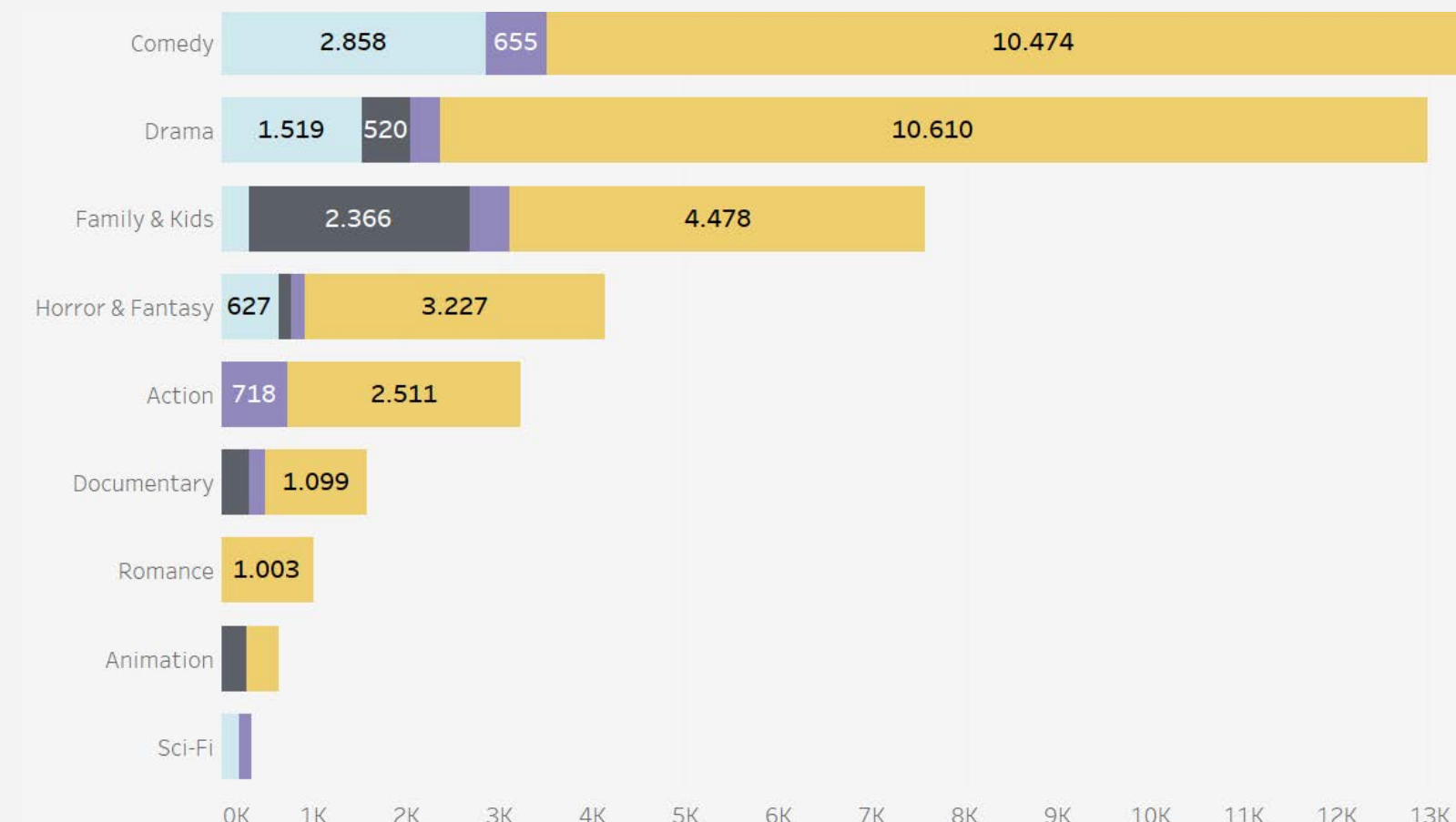
Yes - "Fenómenos" is dominating the spotlight on the European chart this month. However, it is worth noting that "AKA" and "One More Time" secured the second and third positions, respectively. "AKA" comes from the same director and features the main actor of the exceptional Netflix French movie "Lost Bullet 2". On the other hand, "One More Time" takes a fresh approach to the Groundhog Day concept and has garnered a significant number of streams, making it a notable success. In previous reports we've flagged how Netflix is relaunching the French action cinema exports, a tradition that use to belong to the theatrical window in the early 2000, through franchises like "Lost Bullet".

SPAIN 100 MOVIES | SVOD PLATFORMS

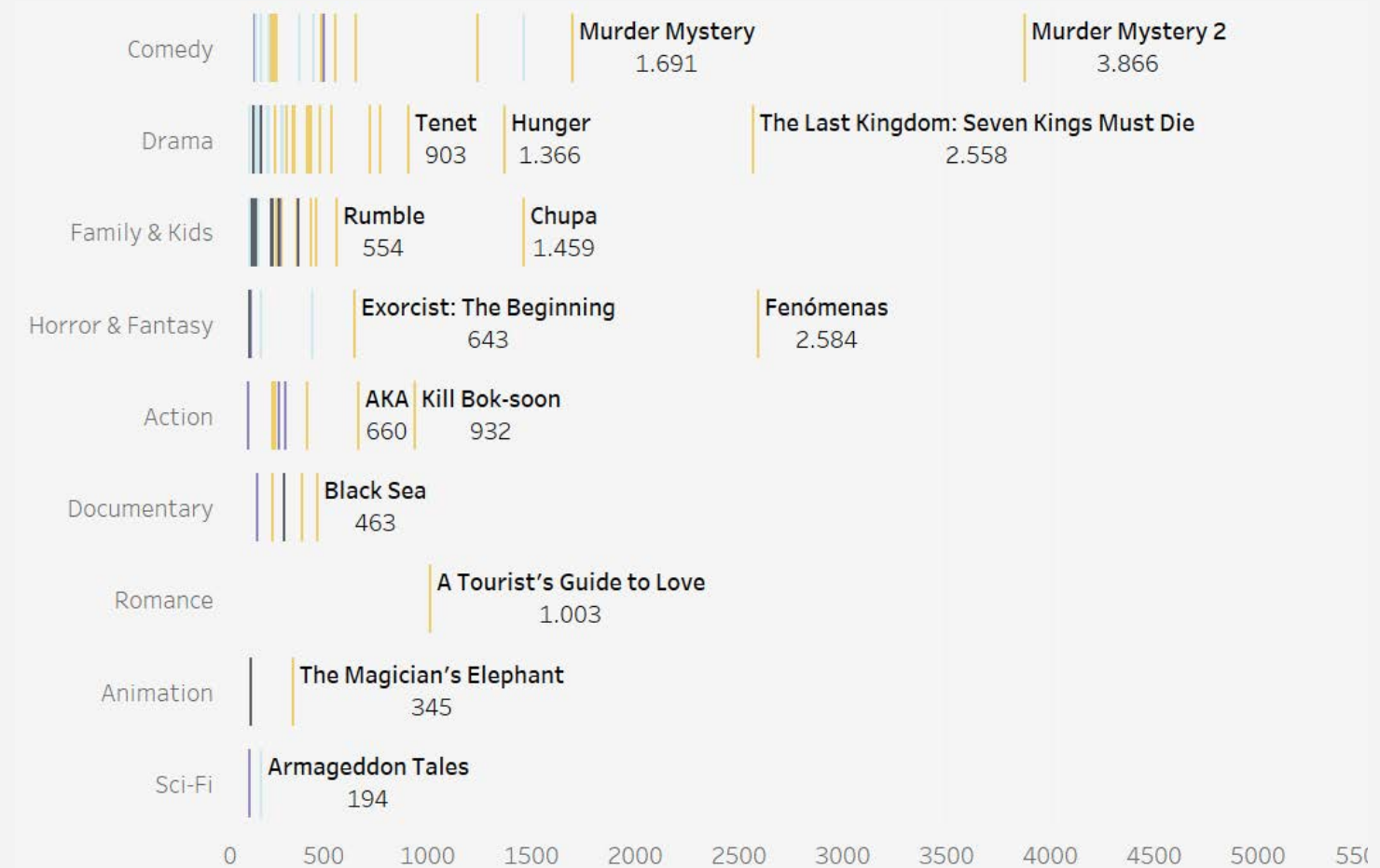
MOST WATCHED GENRES SHARE BY PLATFORM



TOTAL STREAMS BY GENRES PLATFORM COMPARATIVE



TOP SHOWS STREAMS BY GENRES



NETFLIX'S REIGN BUT DISNEY+ SHOWS A STRONG ENTRY IN OUR CHARTS

Disney+ has made a noteworthy entrance into the Think Data charts, shedding light on the highly competitive landscape of the OTT market in Spain. However, it is evident that Netflix continues to dominate, capturing a staggering 74% of the market. Netflix's extensive content library and an impressive lineup of original productions have consistently attracted and retained a substantial viewership. In second place, Amazon holds a respectable 12% market share, showcasing its appeal to audiences with its diverse range of offerings. Despite being relatively new compared to its competitors, Disney+ has managed to secure an 8% share, a testament to its strong presence and growing popularity. HBO Max claims a 6% share of the movie market, proving that it performs way better in the show category.

As anticipated, Disney+ plays a significant role in the Family & Kids genre. The platform offers popular titles such as "Frozen", "The Pope: Answers" (a Spanish special featuring Pope Francis, produced by Hulu, and directed by well-known local TV journalist Jordi Évole), and "Luca" all of which rank among the Top 100 most streamed movies in the Spanish market.

OTT: Amazon Netflix HBO Max Disney+

SPAIN 100 SHOWS | OVERVIEW

TOTAL STREAMS BY SHOW

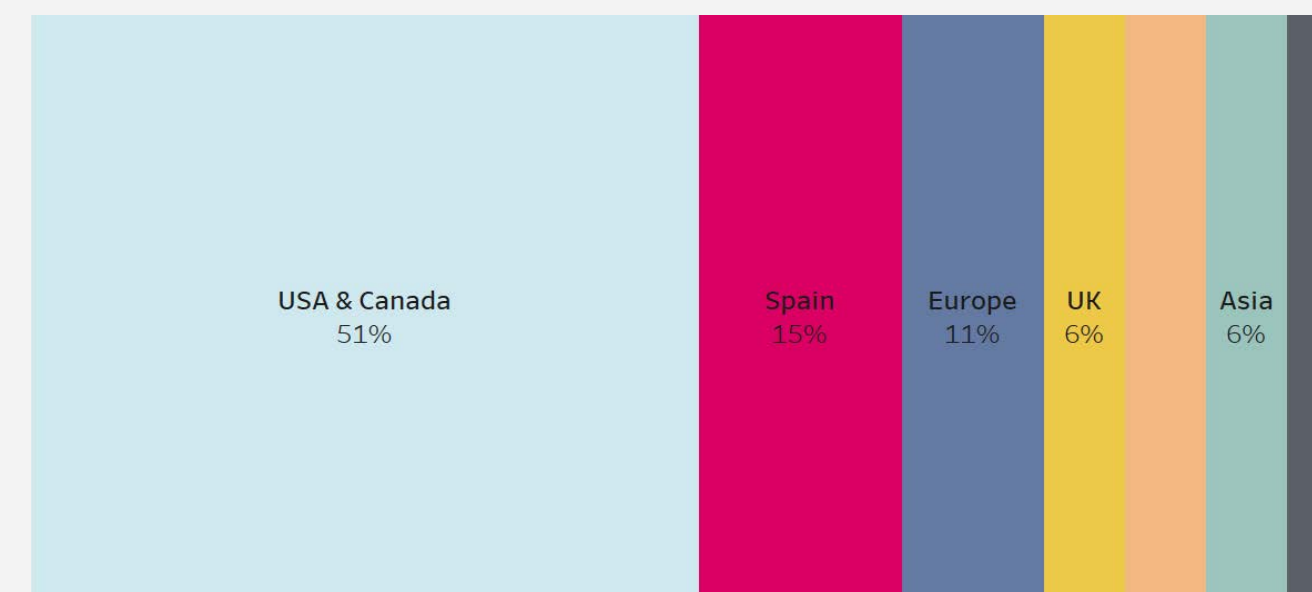
NETFLIX - AMAZON

	SHOWS	PLATFORM	GENRE	
1	Modern Family	Disney+	Comedy	24.344
2	Bluey	Disney+	Family & Kids	22.654
3	The Night Agent	Netflix	Drama	20.642
4	The Mandalorian	Disney+	Sci-Fi	15.278
5	The Big Bang Theory	HBO Max	Comedy	12.854
6	La caza. Monteperdido	Netflix	Drama	11.640
7	How I Met Your Mother	Disney+	Comedy	10.858
8	Grizzly and the Lemmings	Netflix	Family & Kids	10.114
9	Bienvenidos a Edén	Netflix	Drama	8.932
10	Friends	HBO Max	Comedy	8.576
11	The Marked Heart	Netflix	Drama	7.270
12	I am Georgina	Netflix	Game-Show & Reality-TV	6.557
13	The Countryside	Amazon	Comedy	6.337
14	Beef	Netflix	Comedy	6.004
15	Hasta el cielo	Netflix	Thriller	5.692
16	Haikyuu!!	Netflix	Family & Kids	5.572
17	El Príncipe	Netflix	Drama	5.434
18	The Diplomat	Netflix	Drama	5.151
19	The Last of Us	HBO Max	Drama	5.106
20	The Queen of Flow	Netflix	Drama	4.958
21	Obsession	Netflix	Drama	4.946
22	Wellmania	Netflix	Comedy	4.739
23	The Simpsons	Disney+	Animation	4.689
24	Brooklyn Nine-Nine	Netflix	Comedy	4.371
25	Succession	HBO Max	Comedy	4.332
26	Shadow and Bone	Netflix	Family & Kids	4.287
27	Transatlantic	Netflix	Drama	3.521
28	Florida Man	Netflix	Drama	3.451
29	Whom Were We Running ..	Netflix	Drama	3.165
30	How I Met Your Father	Disney+	Comedy	2.918
31	Booba	Netflix	Family & Kids	2.822
32	You	Netflix	Drama	2.731
33	Carnival Row	Amazon	Drama	2.696

SHOWING 33/65 - [See complete chart here](#)

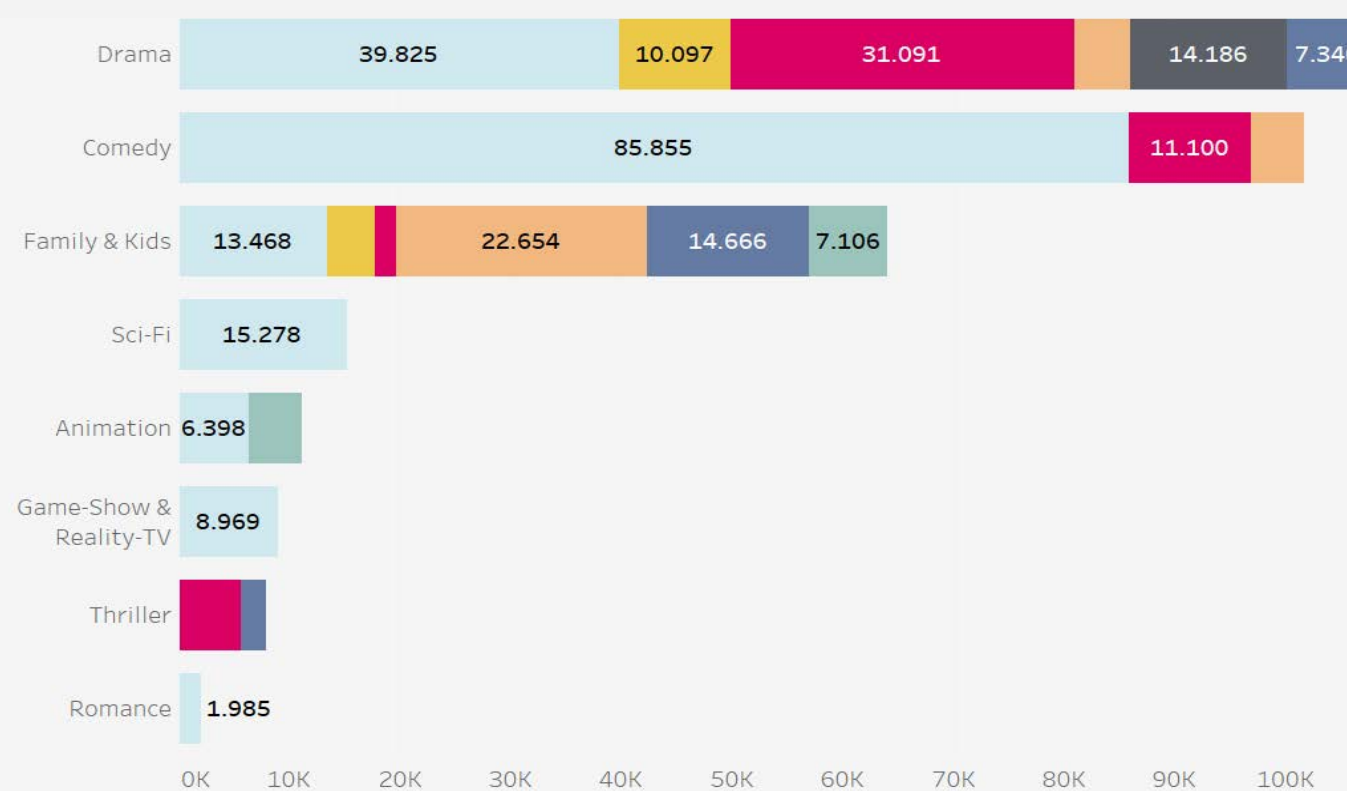
CATALOG SHARE BY COUNTRY

NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES

NETFLIX - AMAZON



streams (.000)

PRODUCTION COUNTRIES:



RECORD-BREAKING ENTRY OF AUSTRALIAN TITLES

This month, our "Others" category in the Production Zone has experienced a significant boost with the introduction of Australian titles, setting a new record. With 10.1% of total streams, this category has achieved its highest share ever in the Spanish market thanks to "Wellmania" and "Bluey". The latter is the second most-watched show this month, is a children's show that has consistently remained among the top Disney+ shows for quite some time, much like "Peppa Pig" constantly achieves. The show has received praise for its positive parenting and is enjoyed by people of all ages within the family. In its first month on Think Data's charts, the show has accumulated 67M views across all five markets. Pretty impressive.

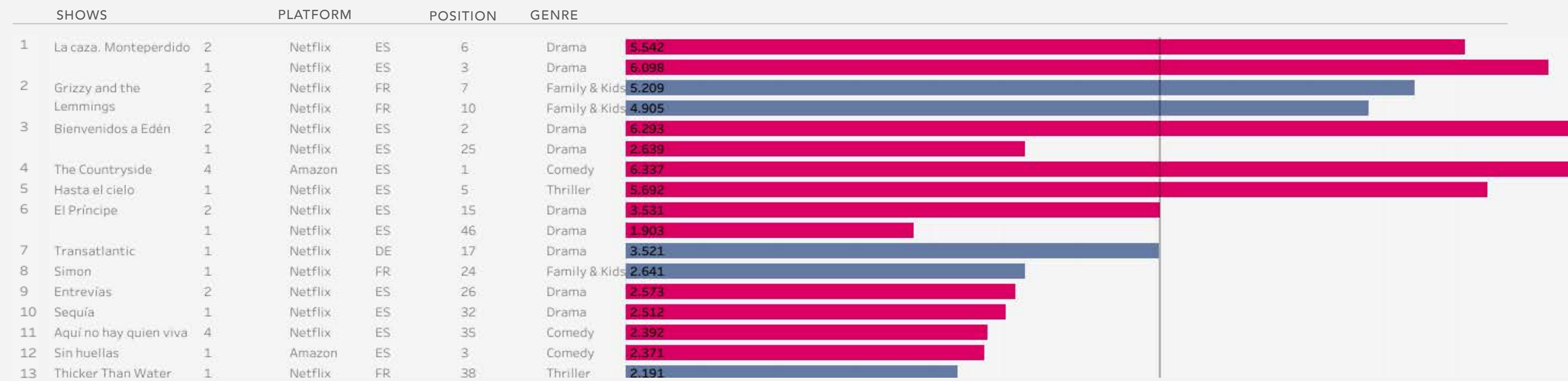
FAMILY & KIDS AND ANIMATION RISE UP FROM LAST MONTH

It's not just "Bluey" to blame. French "Grizzly and the Lemmings" have also experienced growth this month, along with 'Haikyuu'. The addition of the timeless classic "The Simpsons" is also contributing to this rise. The surge in popularity is closely tied to Disney+'s entry into the charts, as they are claiming a significant portion of the Family & Kids market. However, it is the Comedy genre where Walt Disney's platform seems to be making the biggest impact.

SPAIN 100 SHOWS | EUROPEAN FOCUS

LOCAL AND EUROPEAN SHOWS IN THE TOP 100

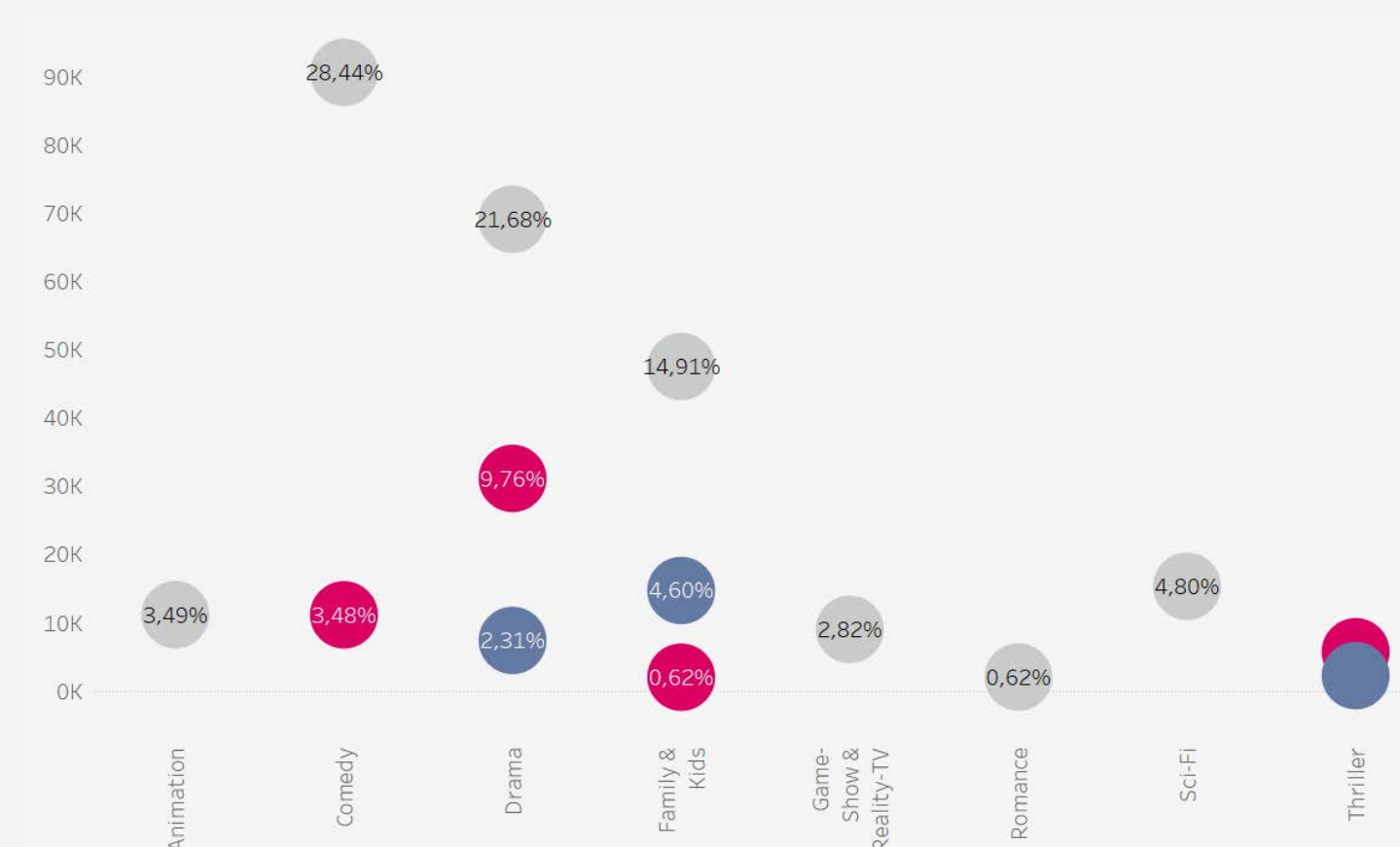
NETFLIX - AMAZON



SHOWING 13/17 - See complete chart here

CONTRIBUTION OF LOCAL & EUROPEAN SHOWS TO TOTAL STREAMS

NETFLIX - AMAZON

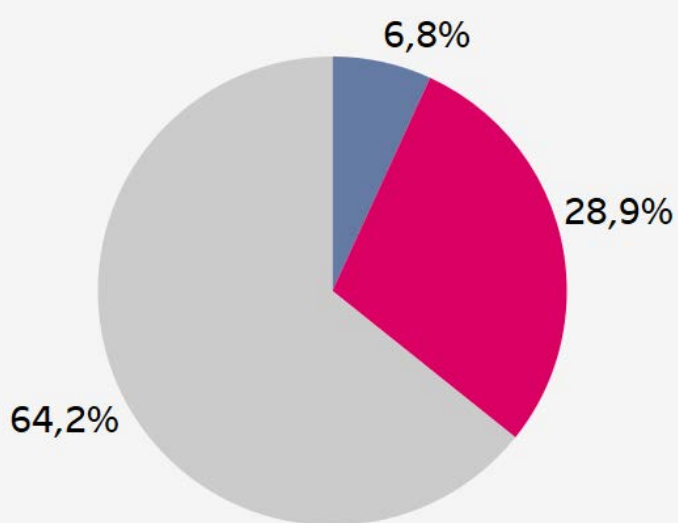


NUMBER OF TITLES BY GENRES

NETFLIX - AMAZON

GENRE	EU	SPAIN
Comedy		3
Drama	3	5
Family & Kids	3	1
Thriller	1	1

CONTRIBUTION TO DRAMA STREAMS



PRODUCTION COUNTRIES:

Europe Spain Others

NON-ORIGINALS STILL STRONGLY THRIVE FOR SECOND CONSECUTIVE MONTH

Spanish shows have performed pretty near to just an average share this month. Despite the limited number of titles that made it into the Top #100, their performance has been more than satisfactory.

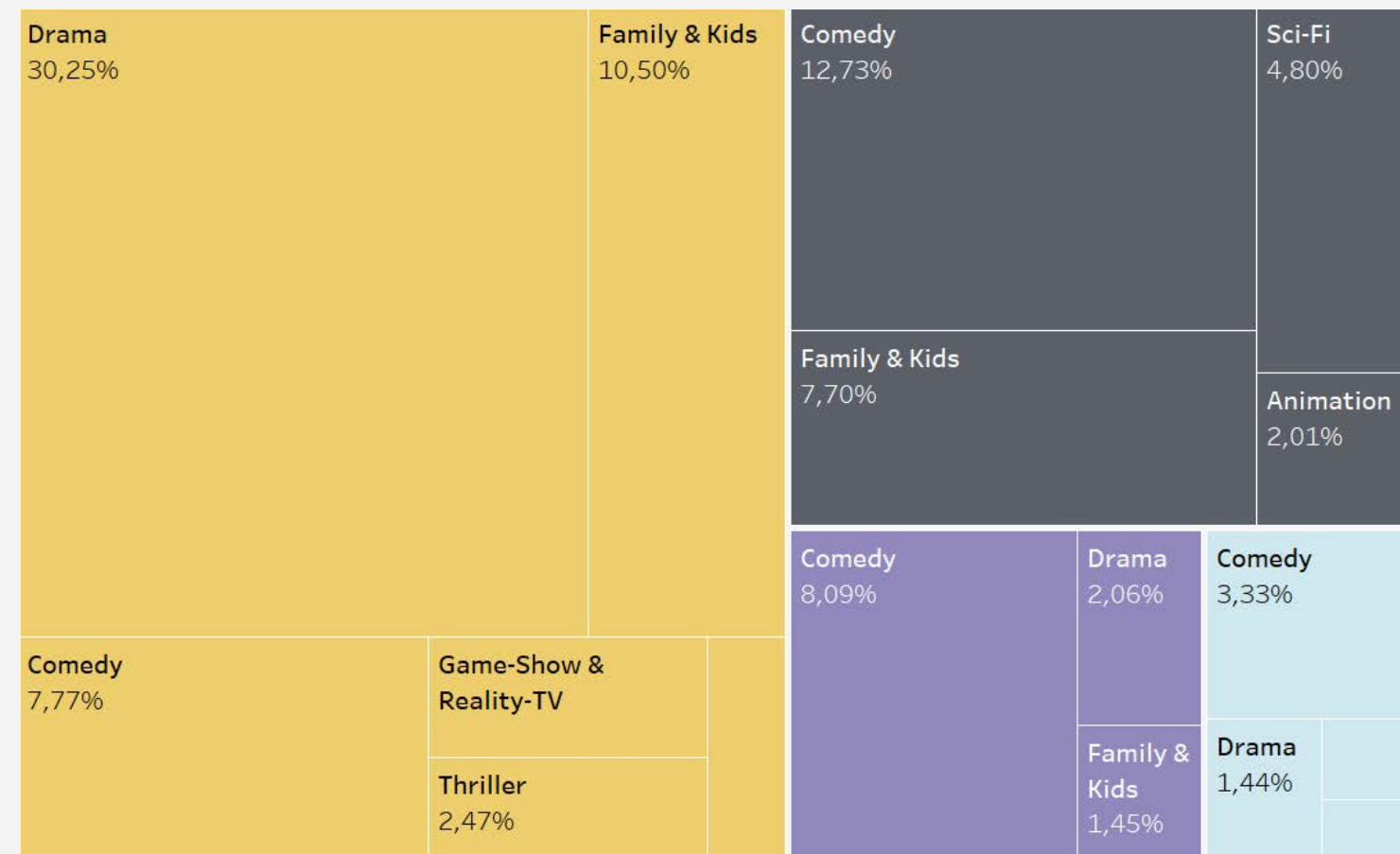
Similar to the previous month, the presence of non-Originals is particularly noteworthy, especially productions from Mediaset and Televisión Española. On Mediaset's side, "The Countryside", created by the Caballero siblings, premiered its fourth and final season and garnered 6.3M views. Other Mediaset productions that have appeared on this month's chart and were seen before include "El Príncipe", "Entrevías", and "Aquí no hay quien viva".

On Televisión Española's productions, "La Caza. Monteperdido" and "Sequía" have achieved 11.6M and 2.5M views, respectively.

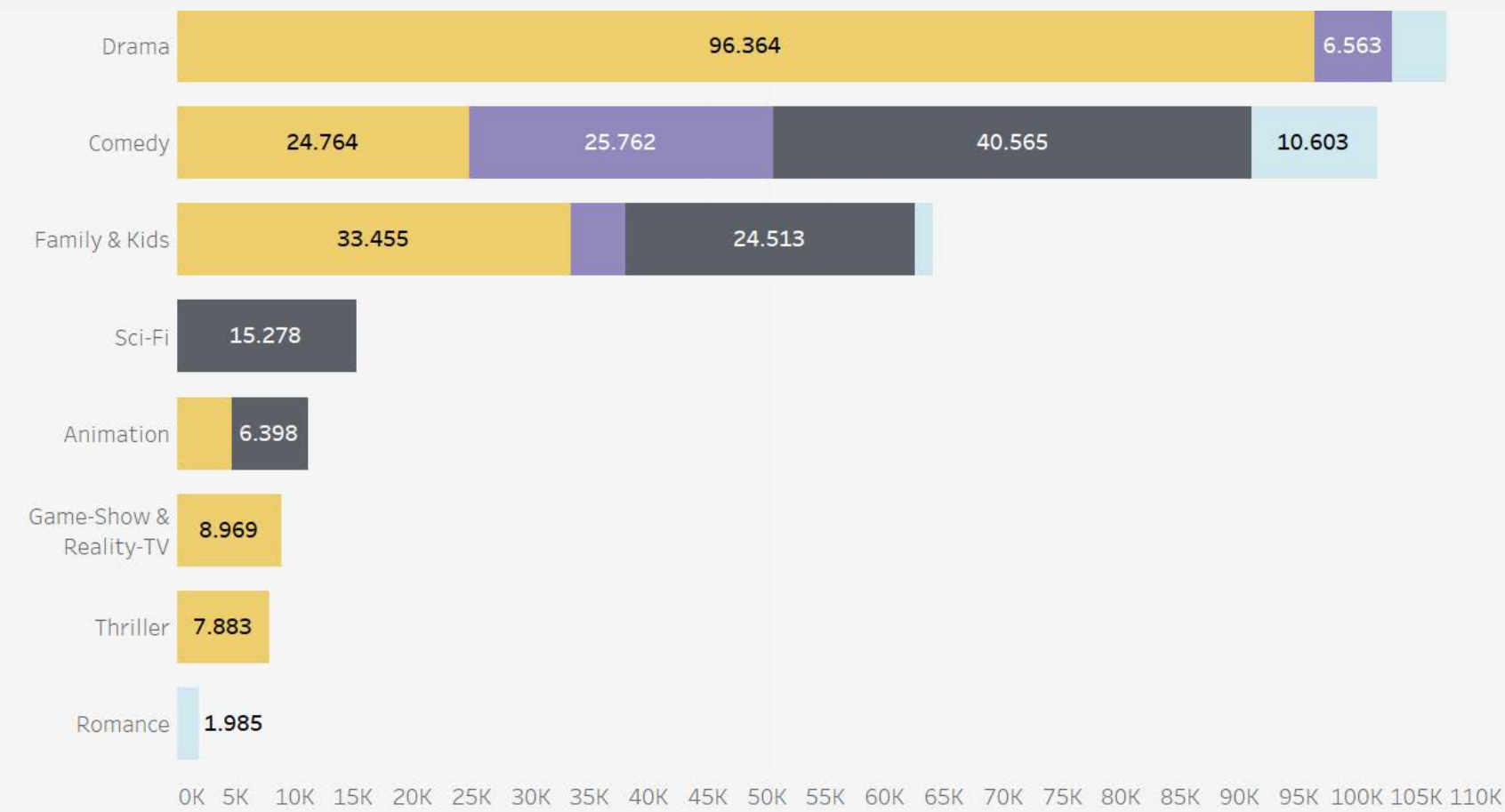
Among the newly incorporated Originals is the second season of "Bienvenidos an Edén" a thrilling television series that has managed to remain in the Top #10 Global for three weeks, accumulating over 75 million hours of viewing, according to Netflix. "Hasta el Cielo," in its second month on the charts, has now gathered 19.6M views.

SPAIN 100 SHOWS | SVOD PLATFORMS

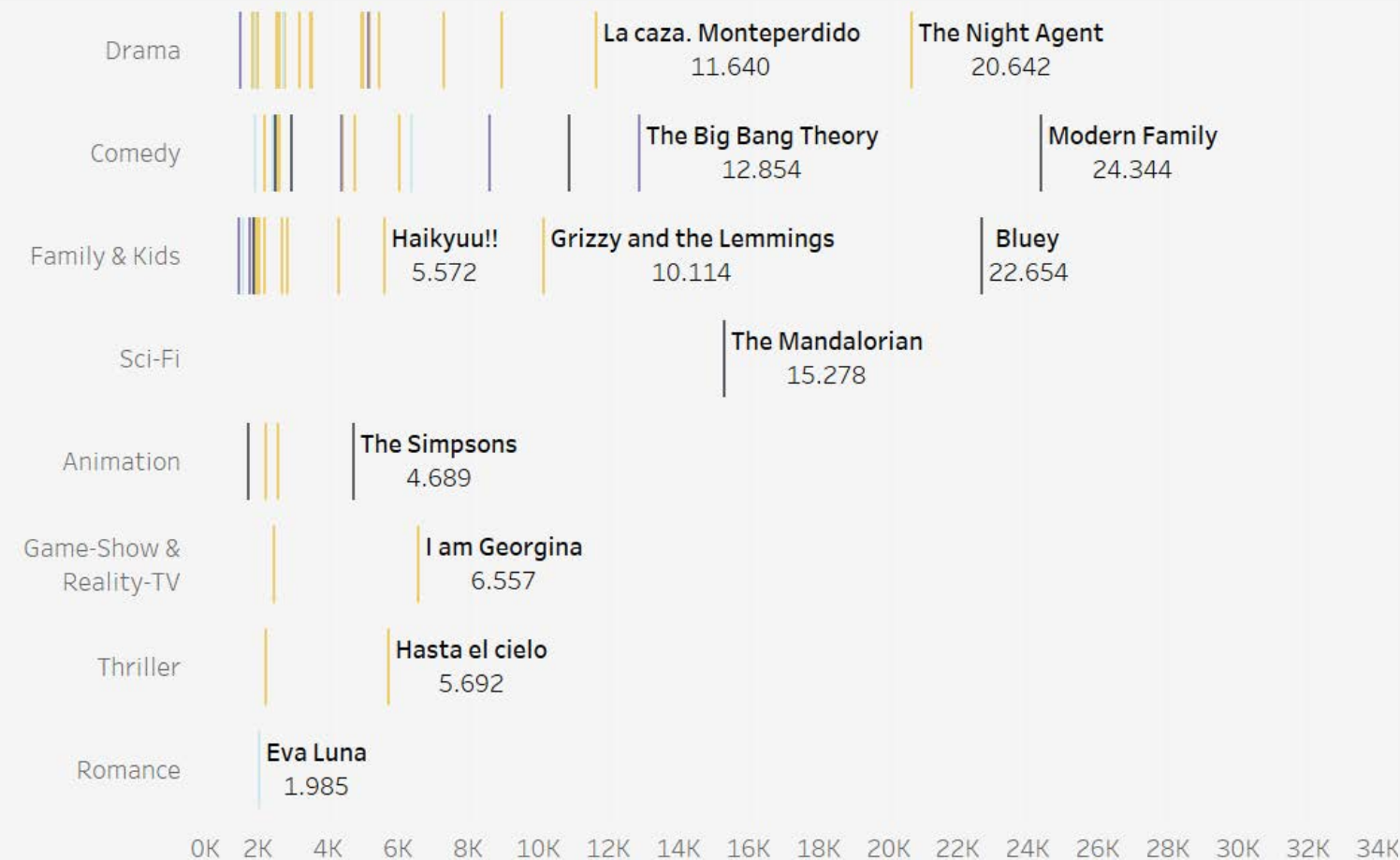
MOST WATCHED GENRES SHARE BY PLATFORM



TOTAL STREAMS BY GENRES PLATFORM COMPARATIVE



TOP SHOWS STREAMS BY GENRES



OTT: Amazon Netflix HBO Max Disney+

NETFLIX FACES INCREASING COMPETITION FROM DISNEY±

The Spanish market is one of the most competitive and fragmented markets for the European context. Four different platforms can be found in our reports. Previously, Netflix used to dominate by amassing nearly 80% of total streams. However, with the introduction of HBO Max and Disney+, the landscape has changed significantly. This month, Netflix continues to hold the largest market share but with a less secure figure, commanding 55.3% of the market.

Following behind is Disney+, capturing a significant 27.2% of the market. Fueled by its popular franchises, beloved classics, and the addition of new exclusive shows and movies such as "Bluey", "The Mandalorian", "How I Met Your Mother", and the remake "How I Met Your Father," among many others, Disney+ has successfully made its mark in Think Data's reports. HBO Max now holds a respectable 11.6% market share. However, the streaming arm of Amazon, Prime Video, only manages to secure a 5.9% market share in the Top #10, positioning itself as the least favoured platform among the Big Four in Europe.

HOT CONTENT IN SPAIN

LOLA RODRÍGUEZ
DATA SPECIALIST



THE RISE OF DOCUMENTARIES ON PLATFORMS: THE REASONS BEHIND THEIR GROWTH

Disney+ has just joined the club, and “The Pope: Answers” is one of the only two European movies that have made it into the charts. Featuring Pope Francis, produced by Hulu, and directed by well-known local TV Journalist Jordi Évole, the documentary has garnered 304K views in the Spanish market. The movie is proof of the consistent presence documentaries have had in the charts in the last couple of years.

“**According to our data, the growth of documentaries in the movie market has an average growth ratio of 0.5, which means that, on average, there is one new documentary in the Top #100 every two months.**”

Additionally, it seems that in Spain, the genre “Documentary” is more popular than others, ranking as the eighth most-streamed genre in the movie market.

Special Demographic Group Zoom In

Amongst our most successful ones in the past years we may find “Schumacher”, “The Tinder Swindler”, “Inside the Mind of a Cat”, “Money Shot: The Pornhub Story”. These have gathered 9M, 34.2M, 12M and 9.3M respectively. SODA kindly let us a window into the

demographic groups that love documentaries. We’ve observed that male audiences and the elderly are more keen on documentaries.

The surge in the popularity and availability of documentaries on streaming platforms can be attributed to several factors that have reshaped the industry. One factor, of course, is money. With shortages and rising production costs plaguing the scripted sector, streaming platforms have shifted their focus to unscripted programming. Documentaries offer an appealing solution as they often require lower production budgets.

Another factor is the audience’s demand for this type of content, which seems to have a significant cultural impact. The skyrocketing popularity of unscripted programming is a global phenomenon. Whether it’s thought-provoking documentaries or lighter factual entertainment content, audiences worldwide have shown an increasing appetite for non-fiction storytelling. Streaming platforms have responded quickly to this demand, curating a diverse range of documentaries catering to various interests, subjects, and cultural contexts.

A third important factor is how easy it is to premiere content on streaming platforms. Traditional distribution methods for documentaries, such as theatrical releases or television broadcasts, often had limited reach. However, the emergence of streaming platforms has provided a new

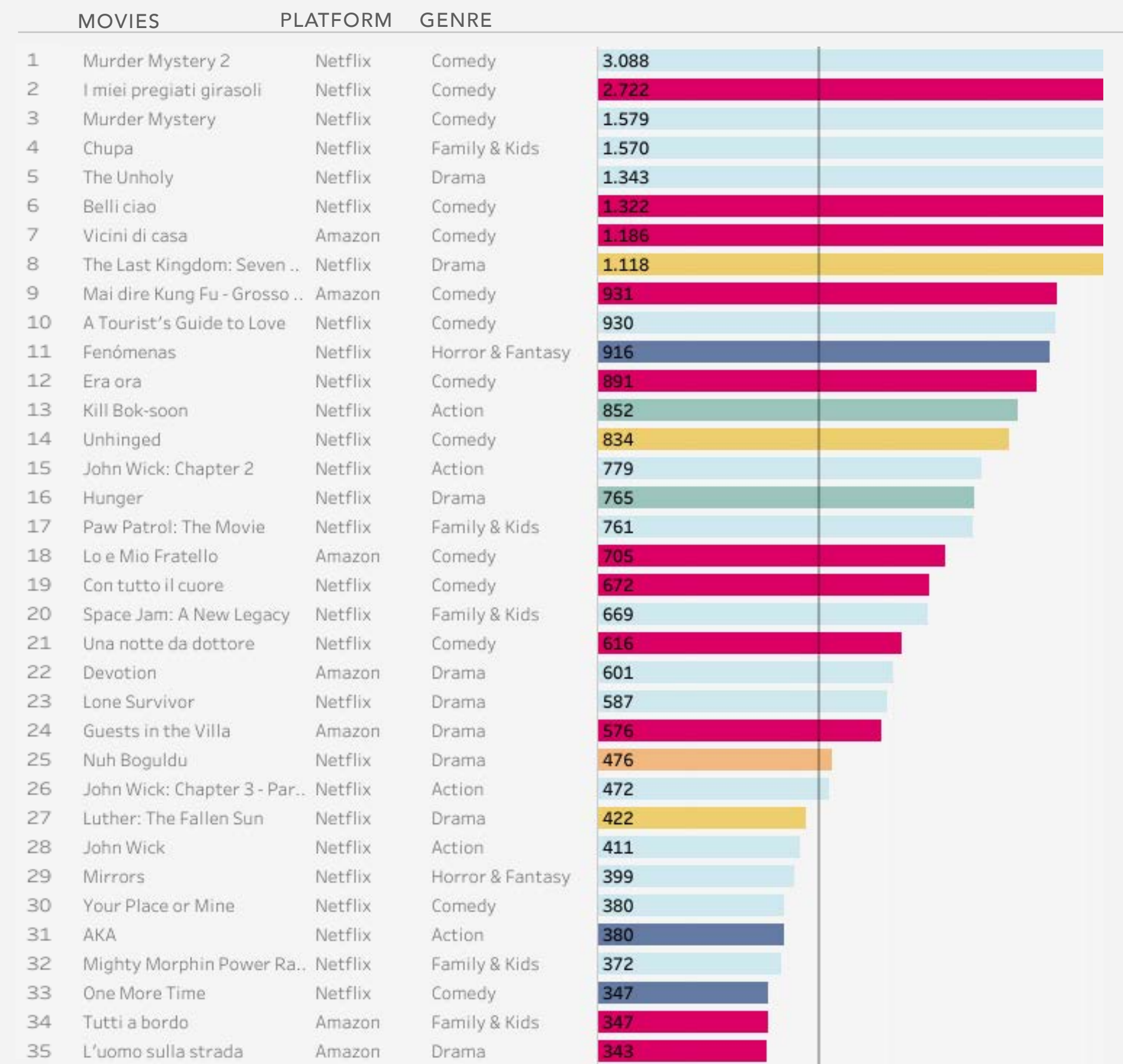
avenue for documentaries to reach a much wider audience. With the ability to be accessed globally, documentaries now have the potential to captivate viewers from diverse backgrounds and cultures, thus increasing their visibility and impact.

The growth of documentaries on streaming platforms can thus be attributed to various factors: the cost-effectiveness of unscripted content, steady global demand for non-fiction programming, increased investments by streaming services, enhanced accessibility, and the cultural and social impact of documentaries. As streaming services continue to expand and evolve, we can expect documentaries to maintain their prominence, providing compelling narratives that audiences, including Europeans, will love. Will the growth rate of documentaries continue to increase, or has it reached its peak?



ITALY 100 MOVIES | OVERVIEW

TOTAL STREAMS BY MOVIE NETFLIX - AMAZON

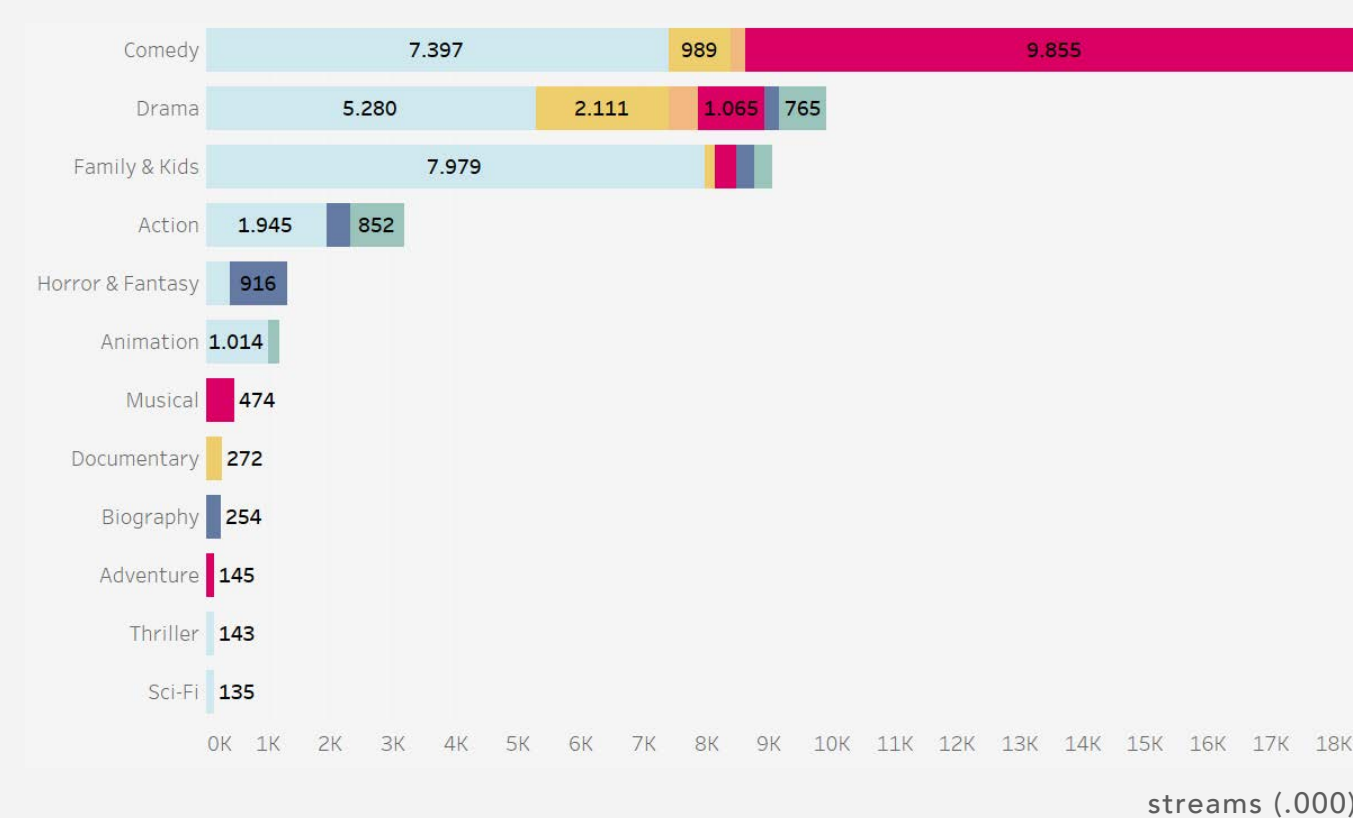


SHOWING 35/100 - [See complete chart here](#)

CATALOG SHARE BY COUNTRY NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES NETFLIX - AMAZON



ITALIAN TODDLERS TOOK THE REMOTE CONTROL

Kids take control of the charts this month by increasing the Family & Kids share up to 20.2%, thanks to the E.T. formula with a Latino flavour, this time called 'Chupa.' Other worldwide phenomena, such as 'Paw Patrol: The Movie' and Warner Bros' 'Space Jam: A New Legacy,' also contributed to this trend.

COMEDY TOOK 42% OF THE SHARE WITH MORE THAN 18M VIEWS

"I miei pregiati girasoli" is the second most-played movie this month. The movie rose 1.9M € in theaters. During this second life here on Netflix, it has already accumulated 2.7M of views.

ASIA STANDS OUT THIS MONTH WITH FESTIVAL-DRIVEN TITLES

"Kill Bok-soon", a film that had its world premiere at the Berlinale Special section of the 73rd Berlin International Film Festival in February and then premiered on Netflix on March 31, has collected 5M in all five markets. "Hunger" is a Thai movie that also provoked a lot of echoes in the platform, collecting 4.3M in the five markets.

PRODUCTION COUNTRIES: Usa & Canada Europe Italy Asia UK Other

ITALY 100 MOVIES | EUROPEAN FOCUS

LOCAL AND EUROPEAN SHOWS IN THE TOP 100

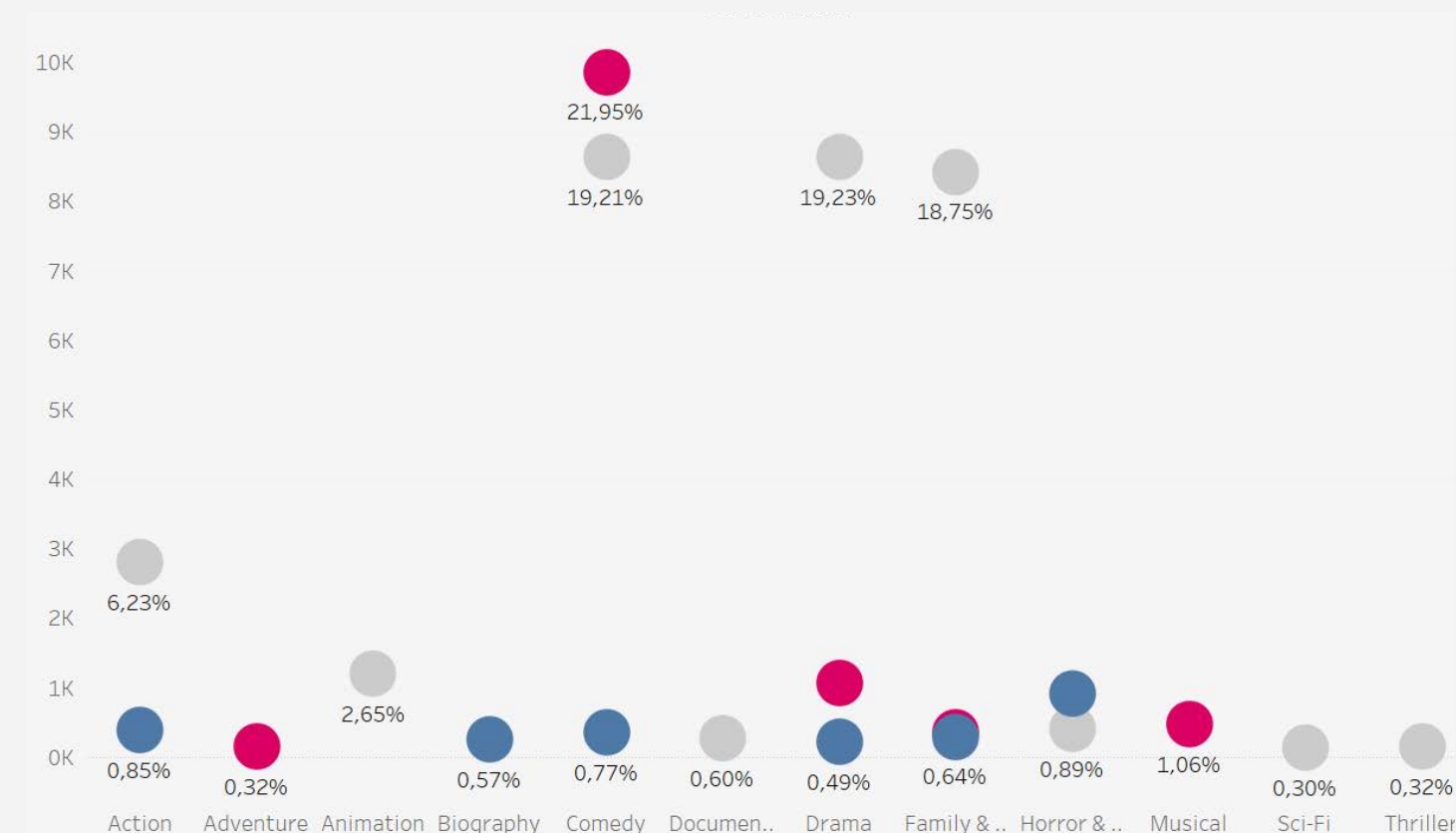
NETFLIX - AMAZON

	MOVIES	PLATFORM		POSITION	GENRE	
1	I miei pregiati girasoli	Netflix	IT	2	Comedy	2,722
2	Belli ciao	Netflix	IT	6	Comedy	1,322
3	Vicini di casa	Amazon	IT	1	Comedy	1,186
4	Mai dire Kung Fu - Grosso...	Amazon	IT	2	Comedy	931
5	Fenómenas	Netflix	ES	9	Horror & Fantasy	916
6	Era ora	Netflix	IT	10	Comedy	891
7	Lo e Mio Fratello	Amazon	IT	3	Comedy	705
8	Con tutto il cuore	Netflix	IT	16	Comedy	672
9	Una notte da dottore	Netflix	IT	18	Comedy	616
10	Guests in the Villa	Amazon	IT	5	Drama	576
11	AKA	Netflix	FR	26	Action	380
12	One More Time	Netflix	SE	28	Comedy	347
13	Tutti a bordo	Amazon	IT	6	Family & Kids	347
14	L'uomo sulla strada	Amazon	IT	7	Drama	343
15	No grazie, il caffè mi rend..	Netflix	IT	34	Comedy	297

SHOWING 15/24 - [See complete chart here](#)

CONTRIBUTION OF LOCAL & EUROPEAN SHOWS TO TOTAL STREAMS

NETFLIX - AMAZON

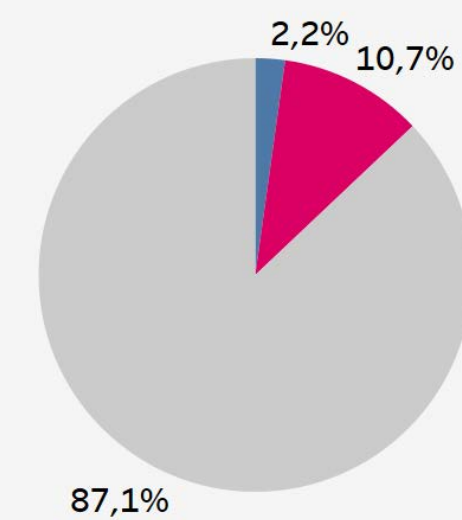


NUMBER OF TITLES BY GENRES

NETFLIX - AMAZON

GENRE	EU	ITALY
Action	1	
Adventure		1
Biography	1	
Comedy	1	11
Drama	1	3
Family & Kids	1	1
Horror & Fantasy	1	
Musical		2

CONTRIBUTION TO DRAMA STREAMS



PRODUCTION COUNTRIES:

Europe Italy Others

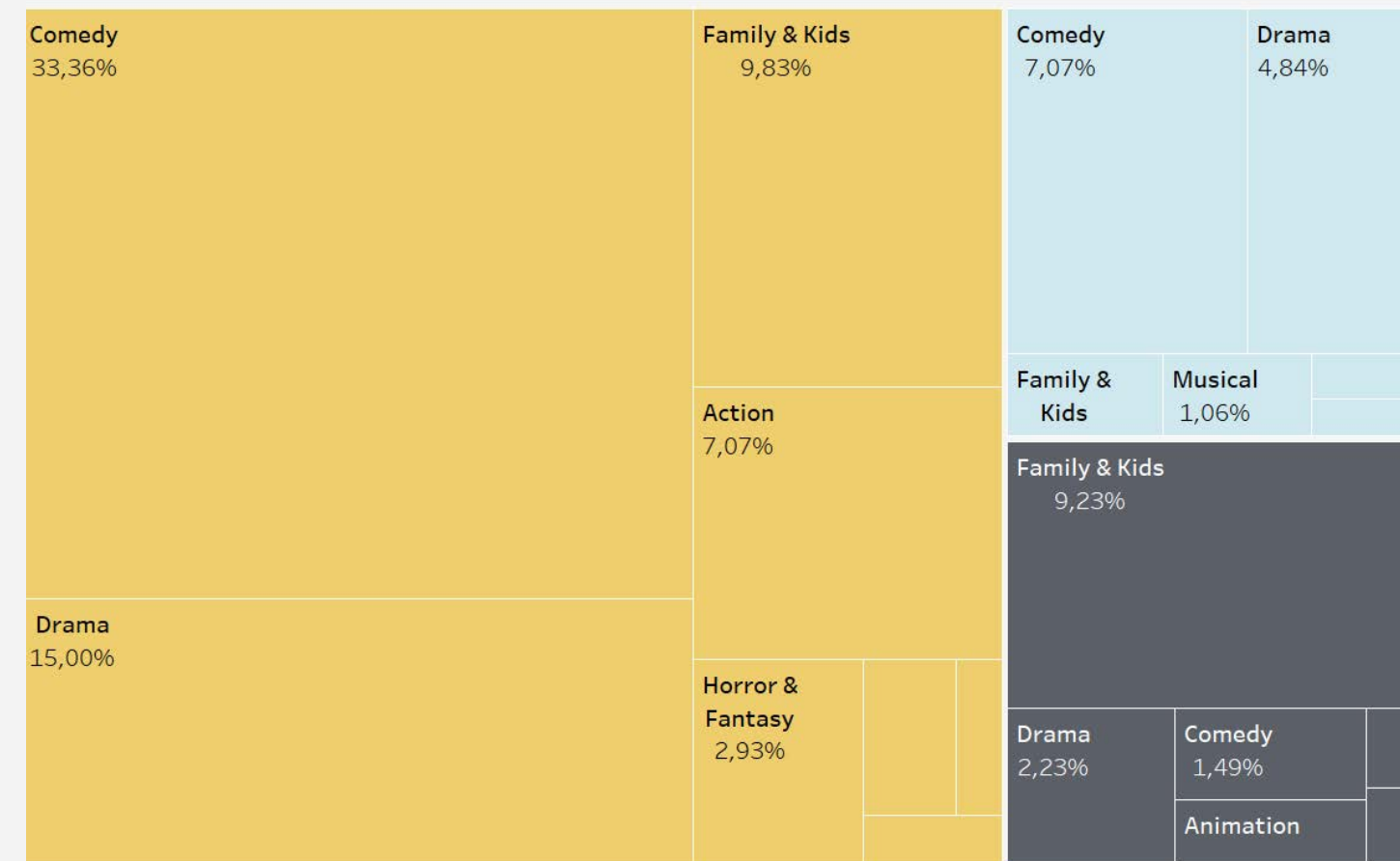
ITALIAN MOVIES BREAK ANOTHER RECORD

With 26.5 of share and 11.8M streams, local movies break the record that January 2022 had set, back when "Come un Gatto in Tangeziale" and "The Hand of God" premiered. The top positions on the charts are occupied by licensed movies, such as "Belli ciao", a remake of Spanish film "Sentimental" "Vicini di Casa", "Con Tutto il Cuore" and "Una Notte da Dottore", following the trend we observed last month regarding licensed titles.

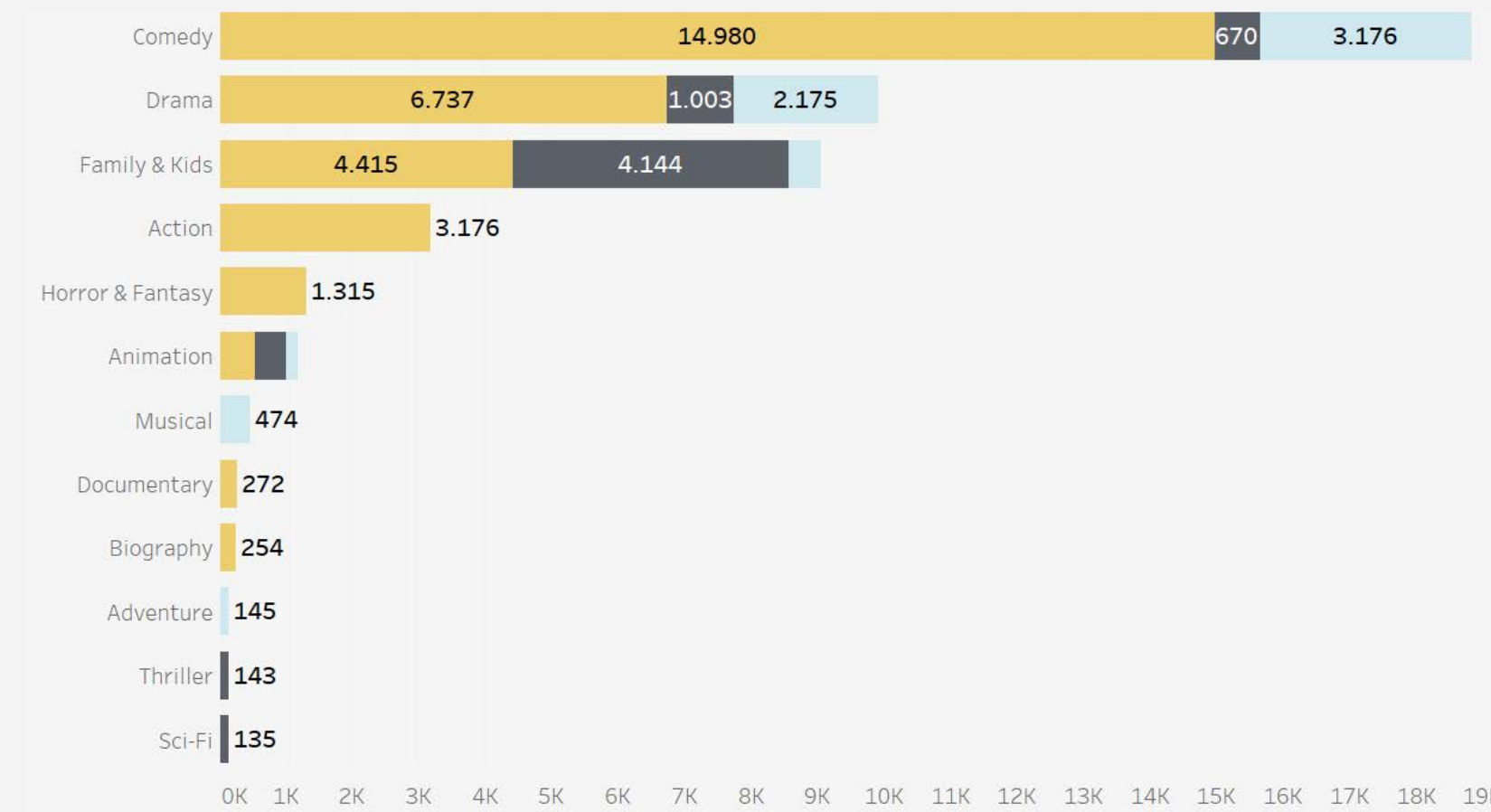
Nevertheless, Originals also made their way onto the list. "Era ora" in its second month of life has now accumulated 3.9M views. Other noteworthy Originals this month include "Mai dire Kung Fu", the movie that follows a nerdy 13-year-old and a broke b-movie actor who pretends to be a Kung Fu master. "Lo e Mio Fratello", follows a sister and a brother arguing for the same girl's love. Both films were produced for Amazon Prime Video.

ITALY 100 MOVIES | SVOD PLATFORMS

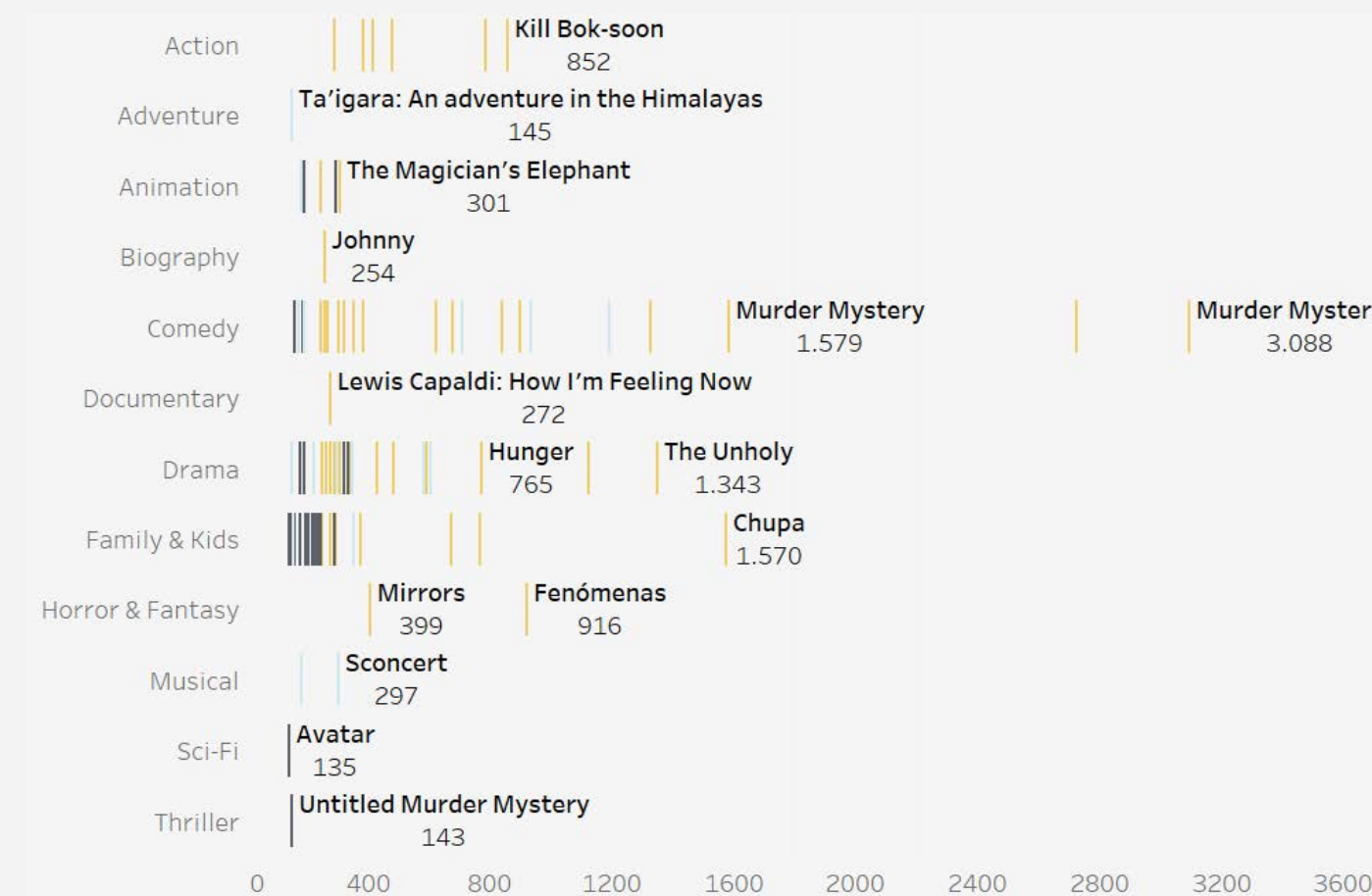
MOST WATCHED GENRES SHARE BY PLATFORM



TOP SHOWS STREAMS BY GENRES



TOTAL STREAMS BY GENRES PLATFORM COMPARATIVE



OTT: Amazon Netflix Disney+

DISNEY+ MAKES AN IMPACT: A PROMINENT ENTRANCE AND RECORD-BREAKING SHARE IN ITALY

Our reports will now harness the power of Disney+ as well! The Walt Disney Studios' OTT service was first launched on November 12, 2019 in the United States and in Italy on March 24 the following year. Turboed by the pandemic timing, in just under 4 years Disney+ has managed to make a decent amount of buzz and keep a loyal audience.

Disney+ secured a 14.6 percent market share, closely trailing Amazon Prime's 14.79 percent, which highlights the platform's importance in the Think Data report. Moreover, this is the best performance Disney has achieved across all five analyzed markets.

While not featured in the European charts, the most successful movies we have observed on Disney+ this month are "Boston Strangler", "Untitled Martin McDonagh Project" and "Turning Red".

ITALY 100 SHOWS | OVERVIEW

TOTAL STREAMS BY SHOW

NETFLIX - AMAZON

	SHOWS	PLATFORM	GENRE	
1	The Rookie	Netflix	Comedy	26.285
2	Modern Family	Disney+	Comedy	23.642
3	The Big Bang Theory	Netflix	Comedy	18.285
4	Grey's Anatomy	Disney+	Comedy	15.946
5	The Night Agent	Netflix	Drama	14.807
6	How I Met Your Mother	Disney+	Comedy	11.233
7	Mare Fuori	Netflix	Drama	9.530
8	Bluey	Disney+	Family & Kids	9.254
9	Bienvenidos a Edén	Netflix	Drama	7.496
10	The Marked Heart	Netflix	Drama	6.954
11	Peppa Pig	Disney+	Family & Kids	6.400
12	Beef	Netflix	Comedy	5.718
13	The Office	Netflix	Comedy	5.277
14	Obsession	Netflix	Drama	4.952
15	The Mandalorian	Disney+	Sci-Fi	4.932
16	Friends	Netflix	Comedy	4.370
17	The Diplomat	Netflix	Drama	4.199
18	Shadow and Bone	Netflix	Family & Kids	4.089
19	Malcolm in the Middle	Disney+	Family & Kids	3.927
20	Suits	Netflix	Comedy	3.772
21	The Simpsons	Disney+	Animation	3.611
22	LOL: Last One Laughing It..	Amazon	Comedy	3.590
23	Once Upon a Time	Disney+	Comedy	3.197
24	Bread Barbershop	Netflix	Family & Kids	3.152
25	Hunter x Hunter	Netflix	Animation	3.028
26	Wellmania	Netflix	Comedy	2.768
27	Star Wars: The Bad Batch	Disney+	Animation	2.650
28	Spidey and His Amazing F..	Disney+	Animation	2.624
29	Unseen	Netflix	Drama	2.604
30	Whom Were We Running ..	Netflix	Drama	2.533
31	Framed! A Sicilian Murder..	Netflix	Comedy	2.528
32	Monster	Netflix	Animation	2.500
33	How I Met Your Father	Disney+	Comedy	2.464
34	Carnival Row	Amazon	Drama	2.384
35	Running for the Truth: Ale..	Netflix	Documentary	2.301
36	Florida Man	Netflix	Drama	2.289
37	Transatlantic	Netflix	Drama	2.057
38	You	Netflix	Drama	1.959

SHOWING 39/60 - [See complete chart here](#)

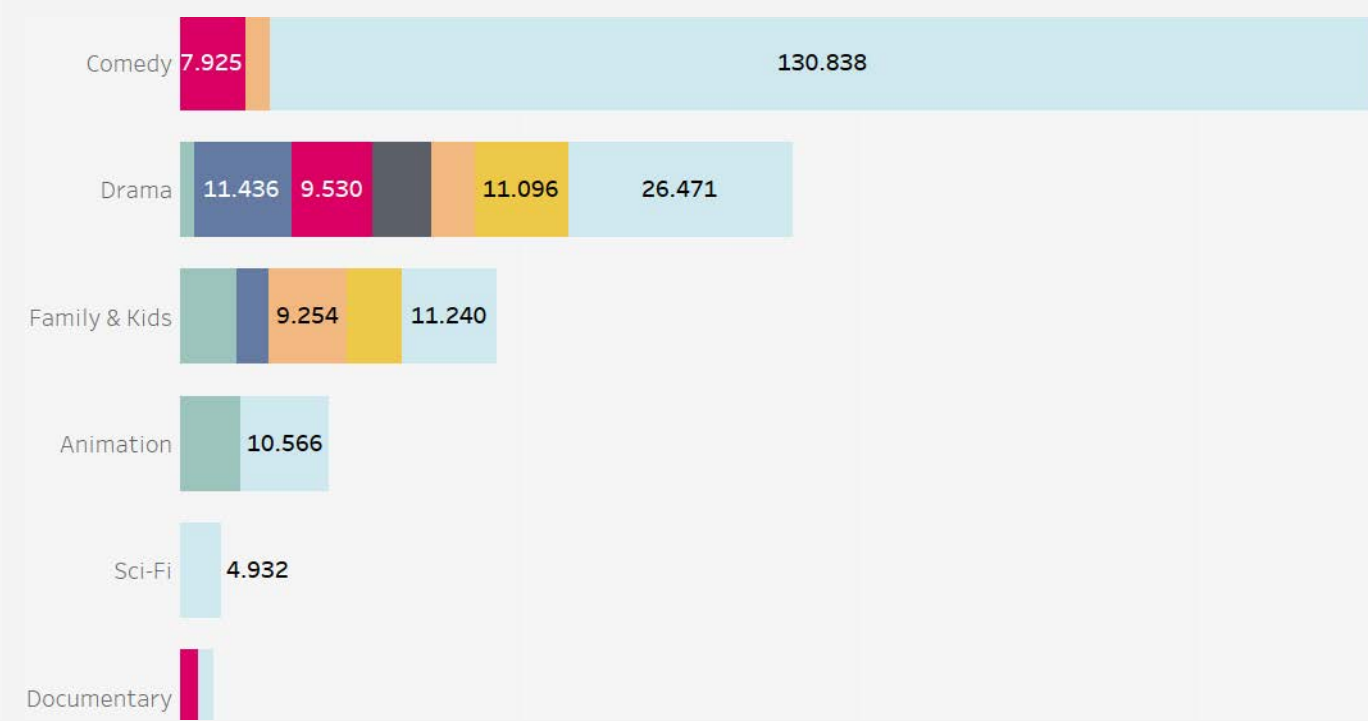
CATALOG SHARE BY COUNTRY

NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES

NETFLIX - AMAZON



streams (.000)

PRODUCTION COUNTRIES:



HALF OF THE STREAMS COME FROM COMEDY SHOWS

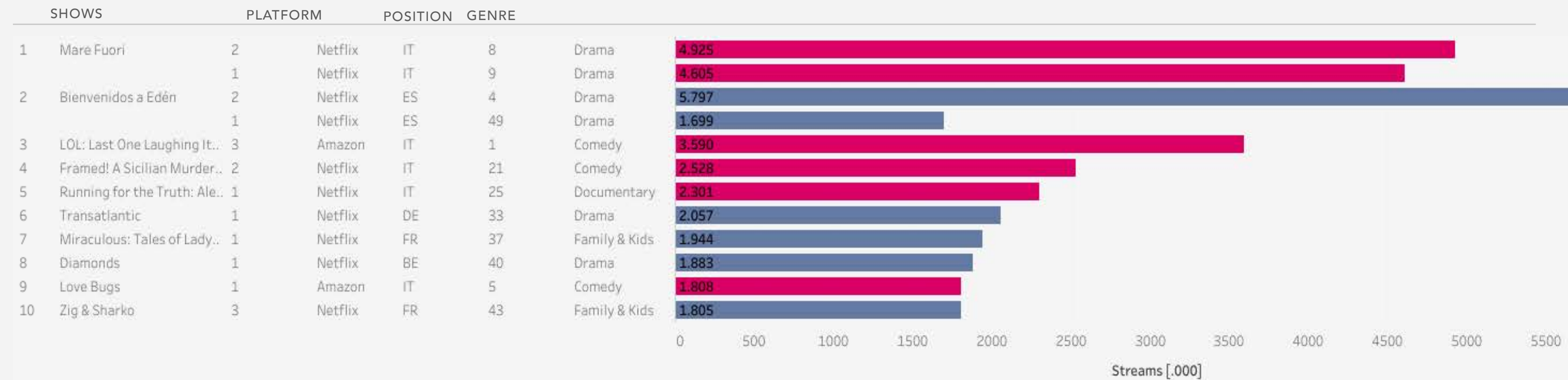
Spring has already kicked off, and Italians are clearly in the mood for some laughs. With over 140M streams this month, Comedy takes the spotlight. The top six most-streamed shows are all Comedy genre, originating from Netflix and Disney+. The majority of these views come from productions from the USA & Canada, making it the dominant production zone with an impressive 130.8M views in this genre alone. "The Rookie" holds the top spot as the most-watched show in Italy, an American police procedural crime drama television series. Following closely is "Modern Family", an already classic sitcom television series. Both series are produced by ABC.

RISE OF ANIMATION STREAMS AND UK'S SHARE

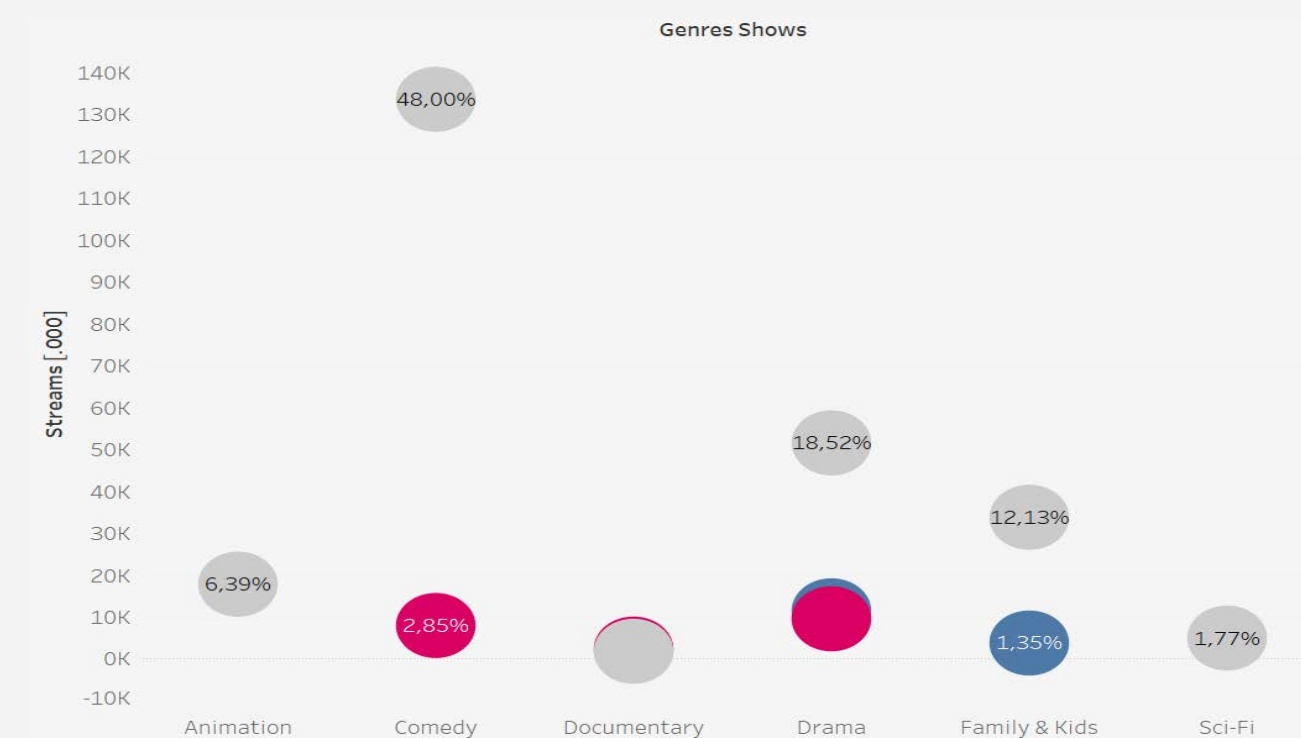
The arrival of Disney+ has brought about a significant change in the presence of Animation shows. With the inclusion of titles such as "The Simpsons", "Star Wars: The Bad Batch", "The Owl House" and "Spidey and His Amazing Friends" the Animation genre has received a collective contribution of 10.5 million streams. Moreover, the UK has also increased its presence on the Italian chart this month, thanks to the perennial favourite "Peppa Pig," as well as the miniseries "Obsession" and "The Diplomat".

ITALY 100 SHOWS | EUROPEAN FOCUS

LOCAL AND EUROPEAN SHOWS IN THE TOP 100 NETFLIX - AMAZON



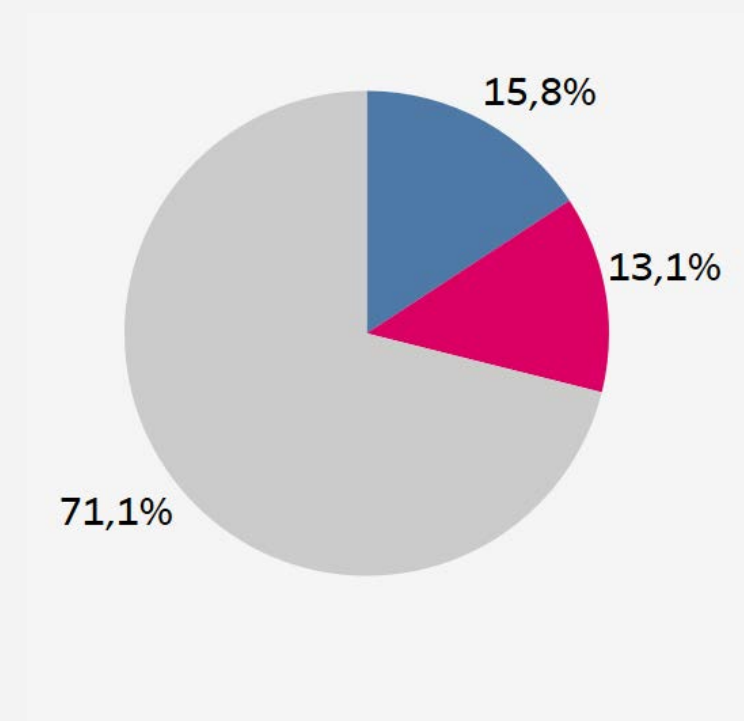
CONTRIBUTION OF LOCAL & EUROPEAN SHOWS TO TOTAL STREAMS NETFLIX - AMAZON



NUMBER OF TITLES BY GENRES NETFLIX - AMAZON

GENRE	EU	ITALY
Comedy		3
Documentary		1
Drama	3	1
Family & Kids	2	

CONTRIBUTION TO DRAMA STREAMS



PRODUCTION COUNTRIES: Europe Italy Others

LACK OF BACK CATALOGUE LEADS LOCAL SHOWS TO DECLINE

After two consecutive months of remarkable performance, local shows accounted for only 7.1% of streams from the Top #100. Similar to the situation in Spain, this can be attributed to a back catalogue and short in launch problem, with only five titles managing to make it onto the charts.

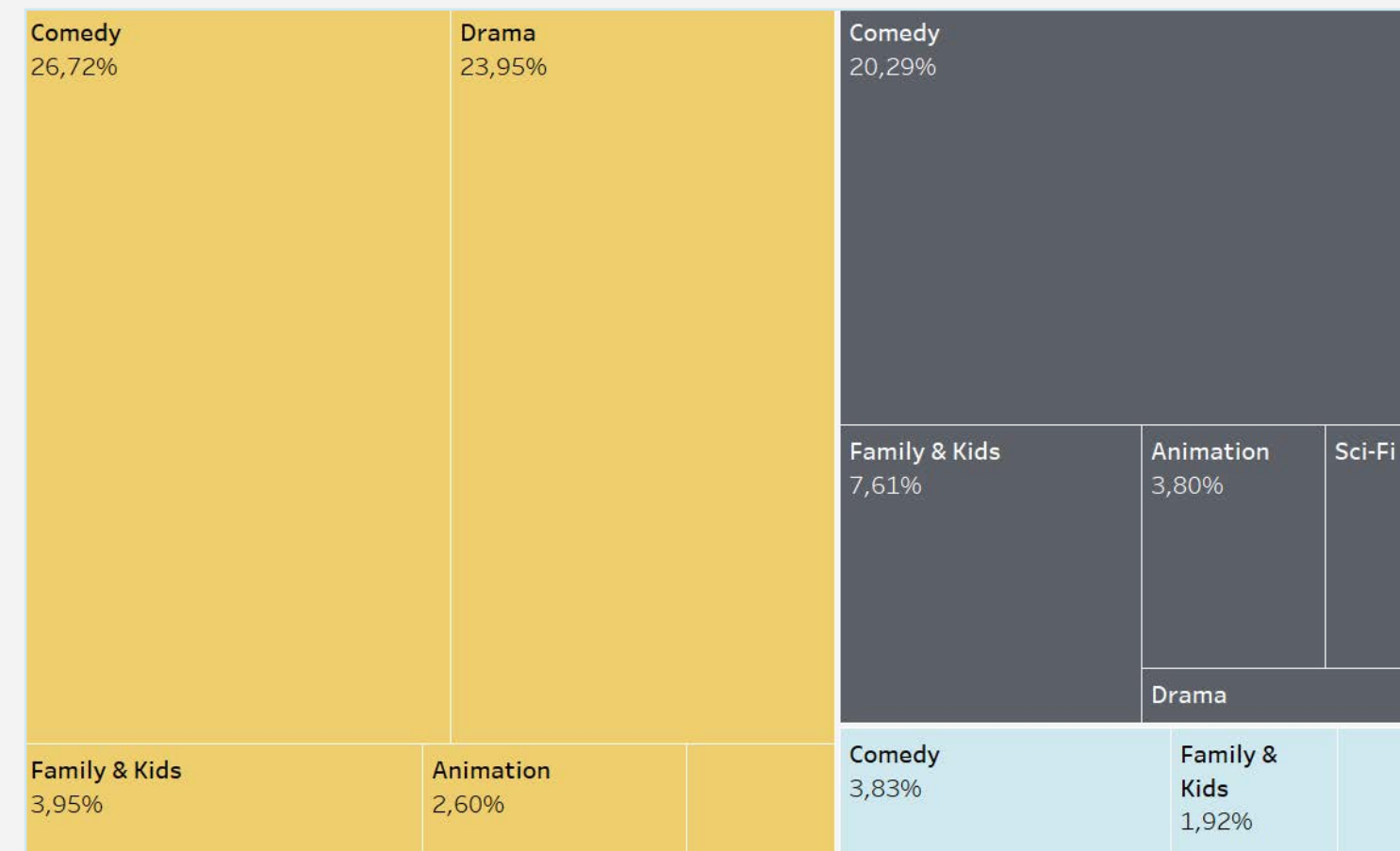
The majority of shows on the charts this month are not new additions. One example is "Mare Fuori" which continues to accumulate streams, currently reaching a total of 133.65M. This show has been consistently present on the charts in Italy since June 2022, with the exception of December 2022. Another recurring show that has garnered a significant number of streams is "LOL: Last One Laughing Italy" with 92.8 million streams, followed by "Framed! A Sicilian Murder Mystery" with 37.3 million streams.

EUROPEAN DRAMA BREAKS THROUGH THE NOISE WITH 15.8% OF SHARE

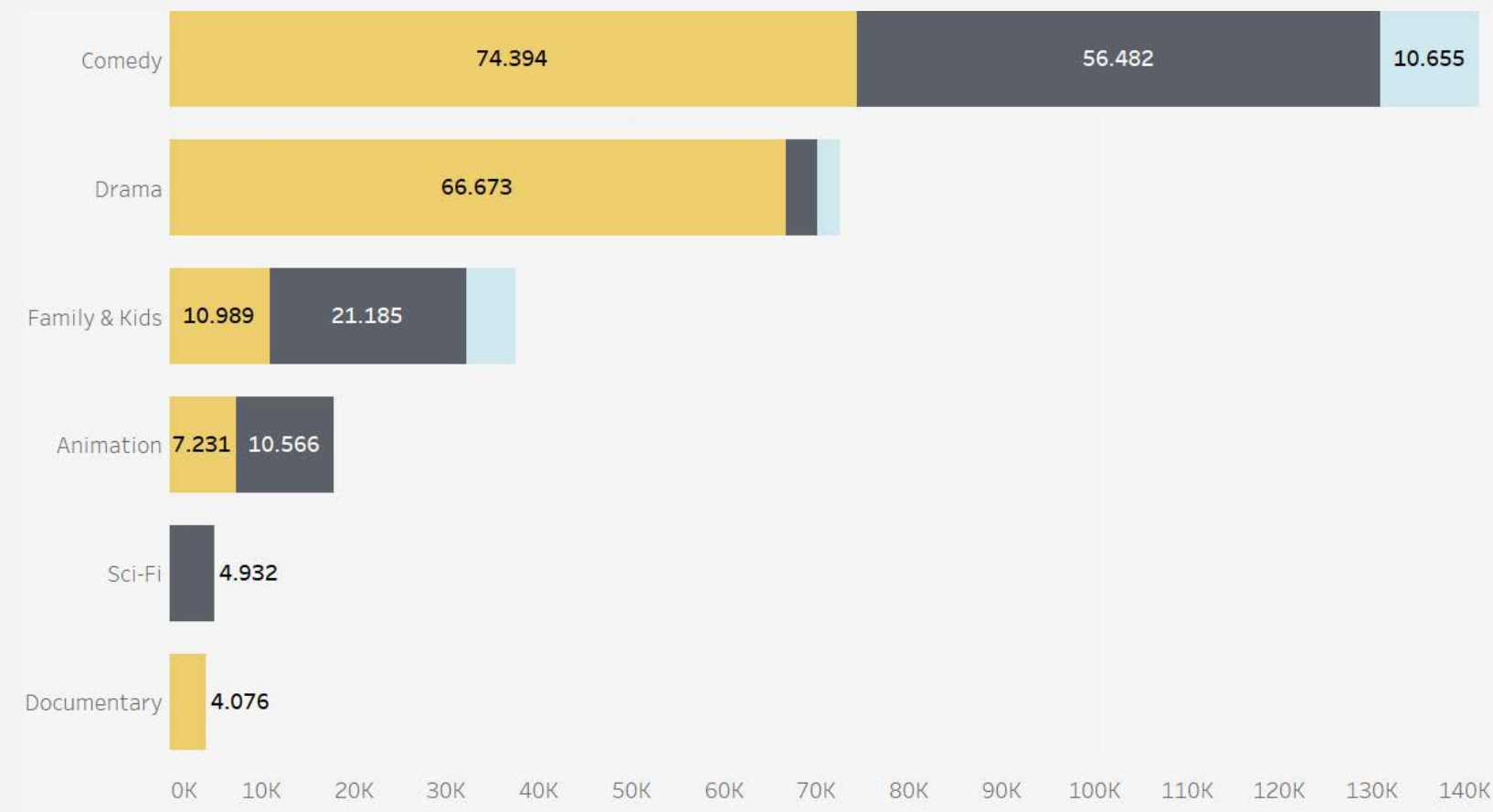
The second season of "Bienvenidos an Edén" has become the second most-streamed European show this month, securing position number 9 in the general charts. Furthermore, the introduction of the new show "Transatlantic" has also helped elevate the prominence of European drama. This series explores a true-based story revolving around the historic Emergency Rescue Committee, which saved numerous intellectuals such as Hannah Arendt, Walter Benjamin, and Marcel Duchamp from the clutches of Nazi Germany.

ITALY 100 SHOWS | SVOD PLATFORMS

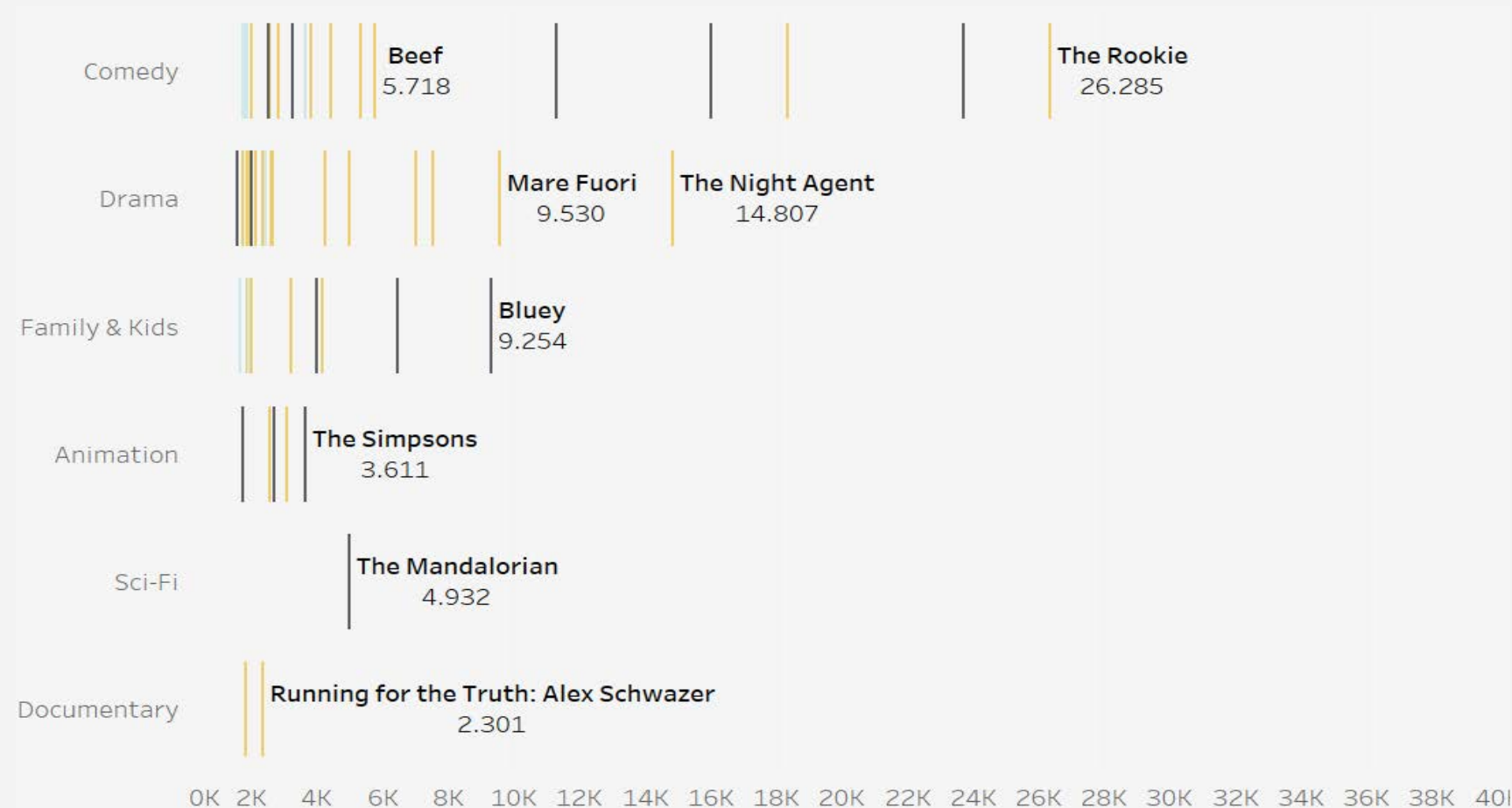
MOST WATCHED GENRES SHARE BY PLATFORM



TOTAL STREAMS BY GENRES PLATFORM COMPARATIVE



TOP SHOWS STREAMS BY GENRES



OTT: Amazon Netflix Disney+

DISNEY+: TRANSFORMING THE ITALIAN STREAMING LANDSCAPE WITH A 34.7% MARKET SHARE

Disney's extensive catalogue of beloved content, both old and new, has had an immediate and transformative impact on the analysis of the Italian streaming landscape. In its first month on the charts, Disney+ made a splash by introducing four titles - "Modern Family", "Grey's Anatomy", "How I Met Your Mother", and "Bluey" - into the Top 10. Additionally, a remarkable number of 44 different seasons and shows from Disney+ made their way into the Top 100, marking an impressive debut for the platform's data. As a result of this success, Disney+ has secured a significant 34.7% share of the market, making Italy the market with the largest share for the streaming service.

On the other hand, Amazon Prime Video's presence in the Italian SVOD market is comparatively smaller, with a share of only 6.6%. Amazon Prime Video has managed to still secure six titles and seasons in the Top 100. "LOL: Last One Laughing Italy" and "Carnival Row" are the shows that have generated more buzz for the platform.

HOT CONTENT IN ITALY

LOLA RODRÍGUEZ
DATA SPECIALIST



THE SOARING ASCENT: ASIAN CONTENT'S TRIUMPH IN EUROPEAN AUDIENCES

In less than three years, Asian content has firmly established itself within the comfort zone of European audiences. Although Anime and other Japanese animation styles were strong contents in European home entertainment since the 90's, the addition of K-Culture gave a whole new volume to Asian shares. Not only in the industry, because it extends far beyond that. The Korean aesthetic, in particular, has experienced a booming popularity. K-beauty has revolutionized the beauty industry and the music scene has surrendered to the emergence of K-pop.

Last month our Think Data team attended an inspiring talk about diversity and inclusion in the audiovisual world by Nusrat Durrani, a veteran MTV LA-Based executive. Someone from the audience asked him: "Everyone says I should do my Tanzanian film in English". He replied: "Don't listen to them, don't ever listen to them. I brought the first K-Pop Artists to the US in the early 2000's. Everyone told me "Why can't they sing in English? I didn't listen to them, I never listened to them. Today K-Pop is a 28 Billion industry. Don't listen to them".

Month after month, Asian movies and shows make their mark on the market charts, playing a significant role in the ongoing streaming war.

“**Asian movies typically capture around 5% of the market share across all five markets, while shows tend to secure approximately 8.3% of the total share.**

France, Italy and Spain are the European markets that are more keen to Asian culture, comparatively, more than the UK and Germany which have a marked American trend. In the Italian market, this month we've seen Asian production zone rise thanks to "Kill Bok Soon", which emerges as the epitome of this trend for the month of April. Within just one month of its release, the movie has garnered an impressive 5 million views, rapidly ascending to become the 9th most-streamed Asian movie. Directed and written by Byun Sung-Hyun, the film had its world premiere at the 73rd edition of the Berlinale, solidifying its impact on a global scale.

Although we lack data prior to 2020, it is an indisputable fact that the demand for Asian content and Asian language content has significantly increased its global share. While Netflix is part of this larger trend, it has assumed a particularly relevant role in the ascent of the K-Trend. Alongside its popular shows, Asian American films like "Minari" and "Everything Everywhere All At Once" have recently swept major awards ceremonies, including the Oscars. All of this makes Netflix take Asian content very seriously.

Netflix gives crucial importance to the principle of diversity and investment in Glocal content, setting itself apart from other platforms, at least for the time being. By investing across different geographical regions, Netflix mitigates the overall risk of its investment portfolio, avoiding overexposure to a single market. And it doesn't stop doing so. In May 2023, Don Kang, Netflix's Vice President of Korean content, announced a staggering \$2.5

billion investment in Korean content and expressed a vision that extends beyond the Asian region. Over the next four years, Netflix plans to allocate this substantial sum to various Korean TV series, films, and non-fiction shows. Recognizing the Korean audience's demand for variety shows, the company aims to double the number of nonfiction shows produced, from approximately four in 2022 to at least eight in the current year. One example is the reality show "Physical 100" released earlier this year, where a hundred contestants engage in physically strenuous challenges. The show garnered 41 million views in the main European countries, securing a place in the top 15 most-streamed Asian shows since 2021.

But now we're seeing how other platforms are following Netflix's lead and imitating its investment strategies. In April 2023, HBO Max celebrated Asian American and Pacific Islander Heritage Month by initiating various projects that showcase the range, diversity, and spirit of the AAPI community. The soon "Max" platform announced a partnership with Gold House, a local leading platform that unites, promotes, and invests in Asian Pacific creators and companies, aiming to promote affirming Asian Pacific storytelling and advance socioeconomic outcomes for the Asian Pacific community. Also, French pay-TV giant Canal+ recently announce that it was gonna take a significant minority stake in successful Asian streaming firm Viu, becoming ultimately its majority owner. Everyone is betting on Asian cultural products.

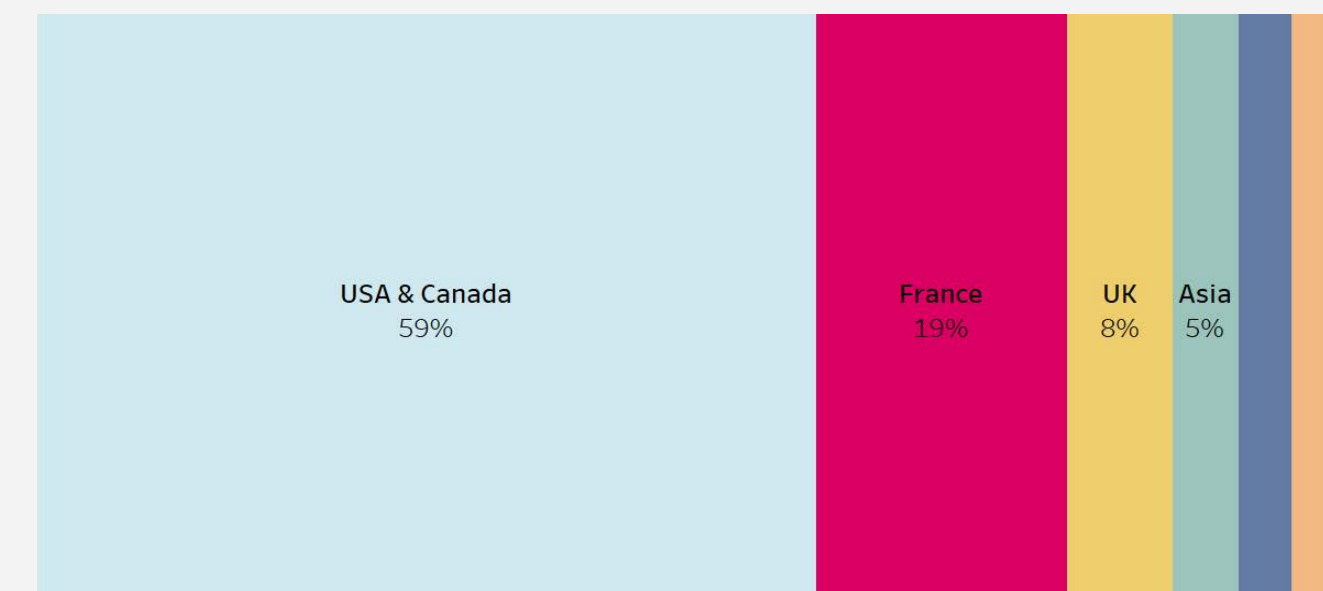
FRANCE 100 MOVIES | OVERVIEW

TOTAL STREAMS BY MOVIE NETFLIX - AMAZON

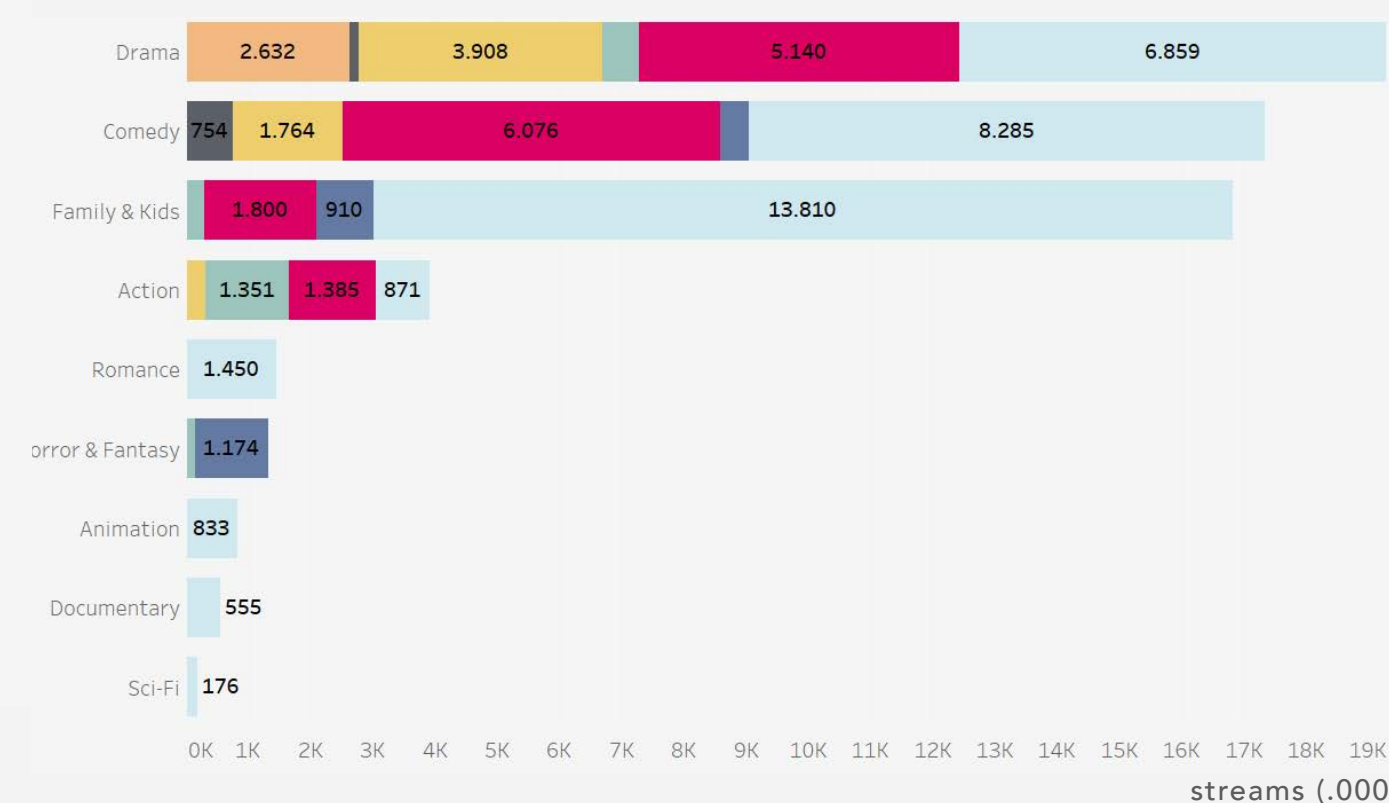
MOVIES	PLATFORM	GENRE	STREAMS
1 Murder Mystery 2	Netflix	Comedy	4,196
2 Chupa	Netflix	Family & Kids	2,994
3 The Last Kingdom: Seven ...	Netflix	Drama	2,757
4 Instant Family	Netflix	Family & Kids	2,479
5 Murder Mystery	Netflix	Comedy	2,253
6 La Parisienne	Netflix	Comedy	2,242
7 15 Minutes of War	Netflix	Drama	1,803
8 Les Misérables	Netflix	Drama	1,573
9 Jumanji: The Next Level	Netflix	Family & Kids	1,465
10 Terra Willy	Netflix	Family & Kids	1,456
11 A Tourist's Guide to Love	Netflix	Romance	1,450
12 Operation Fortune: Ruse ...	Amazon	Comedy	1,427
13 AKA	Netflix	Action	1,385
14 Kill Bok-soon	Netflix	Action	1,351
15 Charlie's Angels	Netflix	Comedy	1,293
16 Fenómenos	Netflix	Horror & Fantasy	1,174
17 Home	Netflix	Drama	1,118
18 Sing 2	Netflix	Family & Kids	1,066
19 The Accountant	Netflix	Drama	940
20 The Invisible Man	Netflix	Drama	907
21 First Knight	Netflix	Drama	849
22 Valerian and the City of a ...	Netflix	Drama	775
23 Fuga de Reinas	Netflix	Comedy	754
24 Venom: Let There Be Carn..	Amazon	Drama	692
25 Heidi	Netflix	Family & Kids	682
26 Five	Netflix	Comedy	647
27 Noah	Netflix	Drama	623
28 School Life	Netflix	Comedy	620
29 It Boy	Netflix	Comedy	615
30 In His Shadow	Netflix	Drama	608
31 Nuh Boguldu	Netflix	Drama	606
32 Mon Ket	Netflix	Comedy	578
33 Luther: The Fallen Sun	Netflix	Drama	569
34 Mighty Morphin Power Ra..	Netflix	Family & Kids	567
35 Battle of the Year	Netflix	Drama	546

SHOWING 35/100 - [See complete chart here](#)

CATALOG SHARE BY COUNTRY NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES NETFLIX - AMAZON



PRODUCTION COUNTRIES: ■ Usa & Canada ■ Europe ■ France ■ UK ■ Other ■ Latam ■ Asia

FAMILY & KIDS CONTENT GREW 11 POINTS AND KEPT THE HEAD ON THE PODIUM

American content dominates the genre classifying 22 titles at the Top100 with flicks such as family adventure movie by Jonás Cuarón and starring Christian Slater “Chupa” which arrived at Netflix’s top 10 chart the first week of release and ranked #2 in our chart with almost 3M streams. “Instant Family” and the 2019 comeback “Jumanji The Next Level.” The Family & Kids genre ranked third with a total of 16.8 million streams. French productions contributed 1.8 million streams to this segment, while European movies approached the one million mark.

DRAMA AND COMEDY SIT AT THE TOP OF THE HEAP, OVERPASSING THE 17.6M VIEWS

France productions raised their profile in the Comedy side with 6M streams and took one of the best spots within the Top6 with “La Parisienne” starring Sylvie of “Emily in Paris,” spills the beans on acting the part of a French femme fatale. UK Original standalone feature film “The Last Kingdom” is the final capstone in Netflix’s British-made TV series, upholding the #3. Asian content pinned five titles in the Top100, with South Korean crime action film about a single mother who is also a lethal killer, “Killing Bok-soon” claimed 1.3M streams.

FRANCE 100 MOVIES | EUROPEAN FOCUS

LOCAL AND EUROPEAN MOVIES IN THE TOP 100

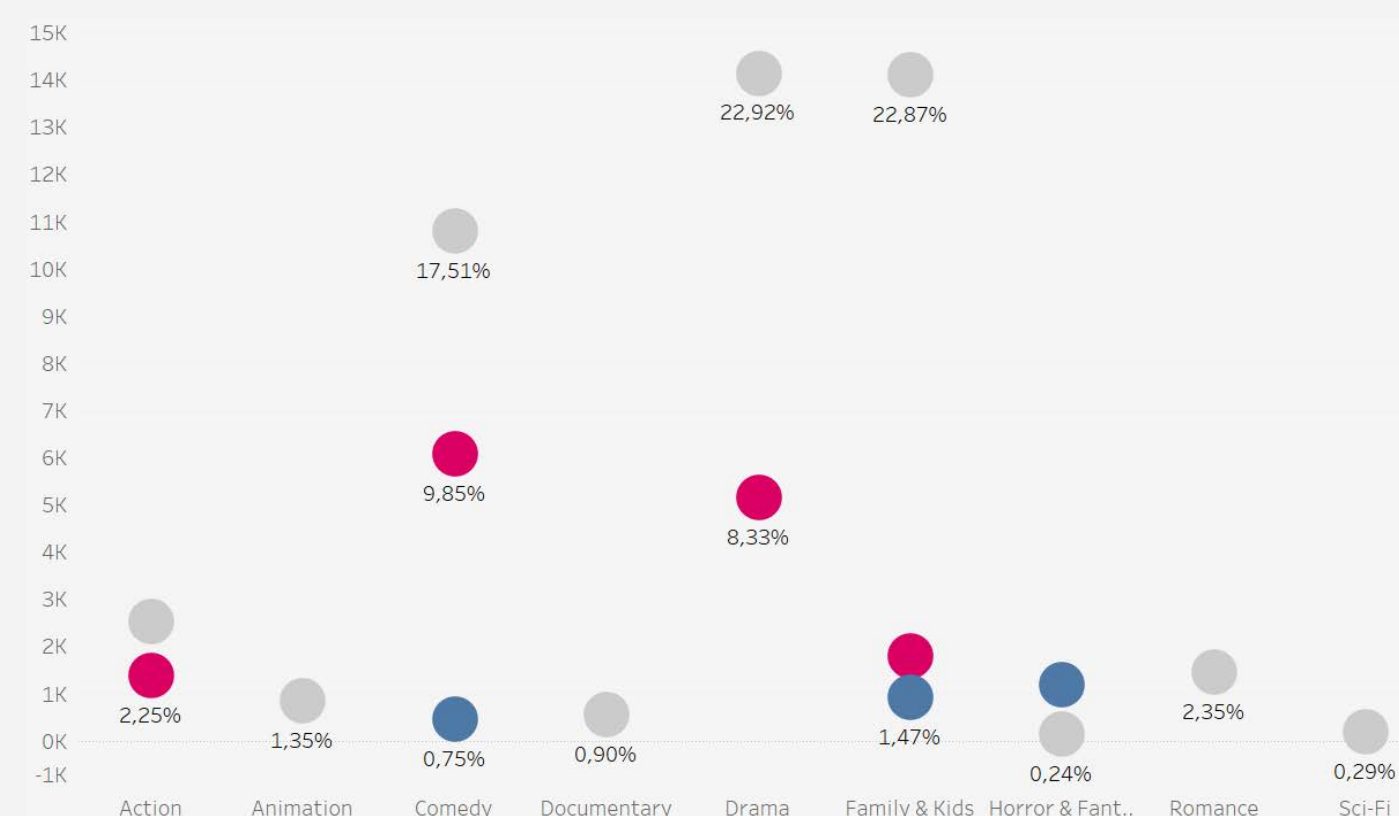
NETFLIX - AMAZON

	MOVIES	PLATFORM		POSITION	GENRE	
1	La Parisienne	Netflix	FR	6	Comedy	2.242
2	15 Minutes of War	Netflix	FR	7	Drama	1.803
3	Les Misérables	Netflix	FR	8	Drama	1.573
4	Terra Willy	Netflix	FR	10	Family & Kids	1.456
5	AKA	Netflix	FR	12	Action	1.385
6	Fenómenas	Netflix	ES	15	Horror & Fantasy	1.174
7	Valerian and the City of a ..	Netflix	FR	21	Drama	775
8	Heidi	Netflix	DE	23	Family & Kids	682
9	Five	Netflix	FR	24	Comedy	647
10	School Life	Netflix	FR	26	Comedy	620
11	It Boy	Netflix	FR	27	Comedy	615
12	In His Shadow	Netflix	FR	28	Drama	608
13	Mon Ket	Netflix	FR	30	Comedy	578
14	Adieu Hier	Amazon	FR	3	Comedy	463
15	One More Time	Netflix	SE	37	Comedy	461

SHOWING 15/23 - [See complete chart here](#)

CONTRIBUTION OF LOCAL & EUROPEAN MOVIES TO TOTAL STREAMS

NETFLIX - AMAZON



NUMBER OF TITLES BY GENRES

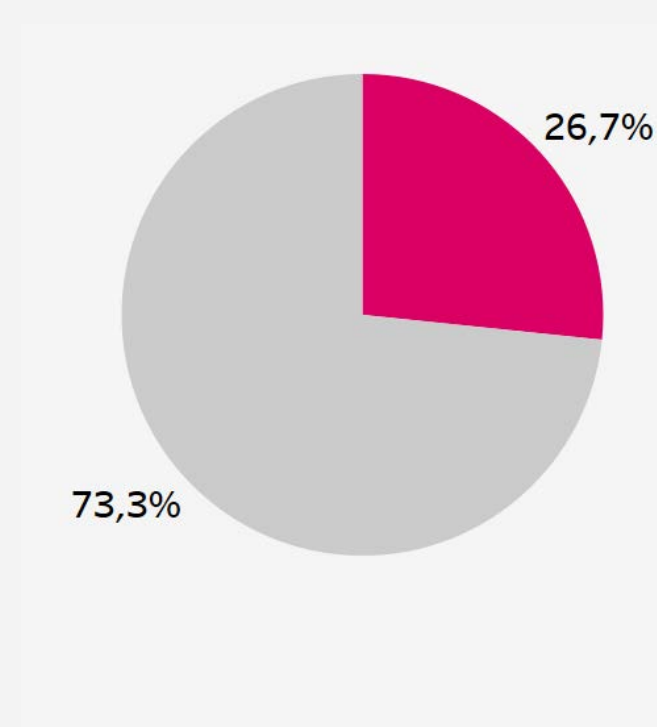
NETFLIX - AMAZON

GENRE	EU	FRANCE
Action	1	1
Comedy	1	10
Drama	1	6
Family & Kids	2	2
Horror & Fanta..	1	0

PRODUCTION COUNTRIES:

Europe France Others

CONTRIBUTION TO DRAMA STREAMS



MASSIVE DROP OF EUROPEAN PRODUCTIONS

In the past few months, European productions have seen a decline in popularity on the Top100 grid. In February, they had an 8% viewing quota, but this month it has dropped to 0.75%. Only four titles made it to the Top100 list, with the Spanish horror movie "Fenómenas" leading the pack and gaining international attention as one of the top five non-English-speaking content. The only European movie to make it to the local Top 5 list is the Netflix production directed by Carlos Therón, which has reached 1.1 million streams.

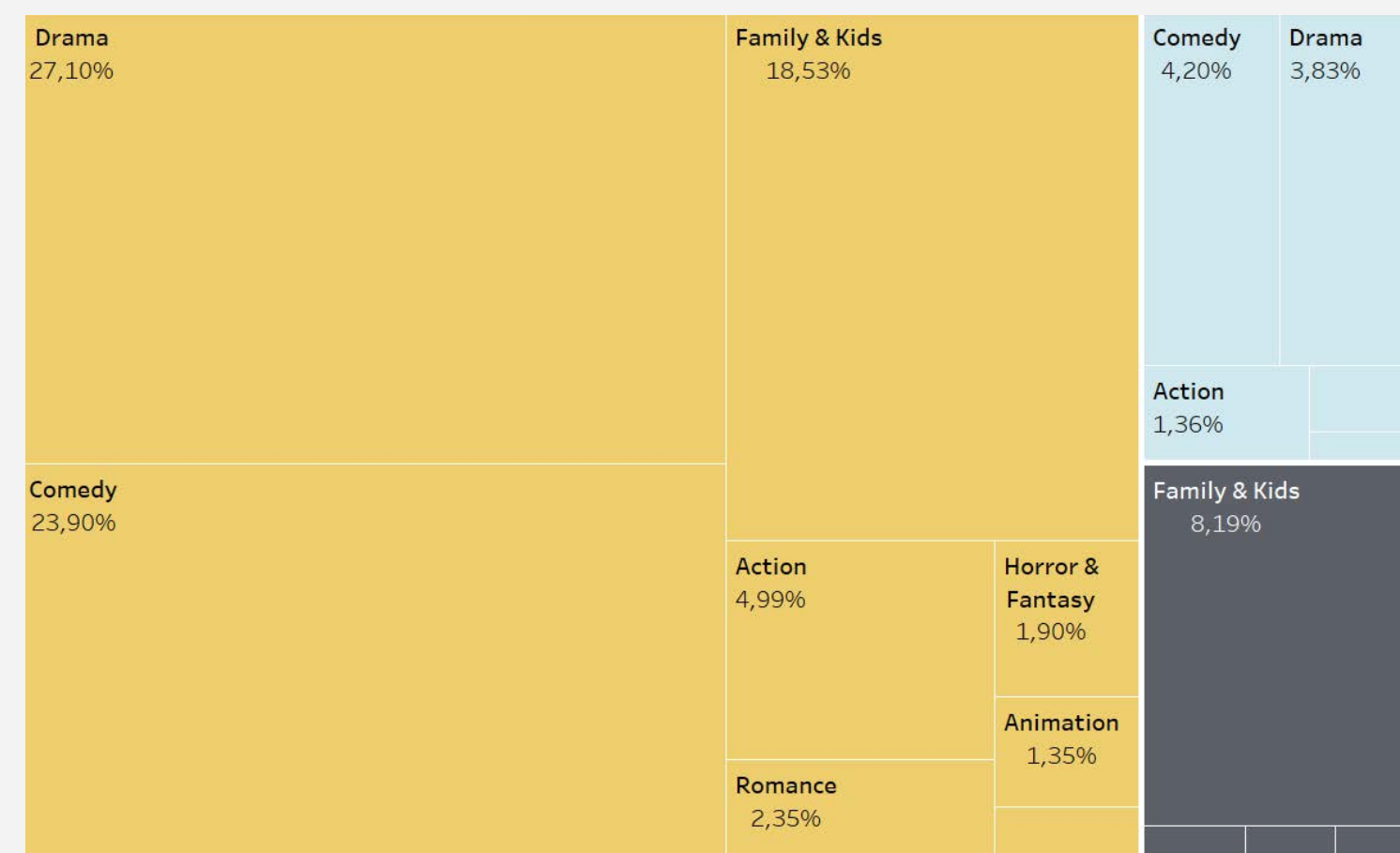
FRENCH COMEDIES SURROUND AN EXCEPTIONALLY SUCCESSFUL AWARD-WINNING DRAMA

The directorial debut of Lady Dj, which was an adaptation of "Les Misérables" set in modern-day Paris, amassed 1.5 million streams. The film received the Jury Prize at Cannes, was Oscar nominated, and has won numerous other awards globally. This is a high figure for an independent drama film, which follows up the great success of "Athena", a comparable title also set in the conflictual outskirts of Parisian cities, with Ladj Ly as a co-writer.

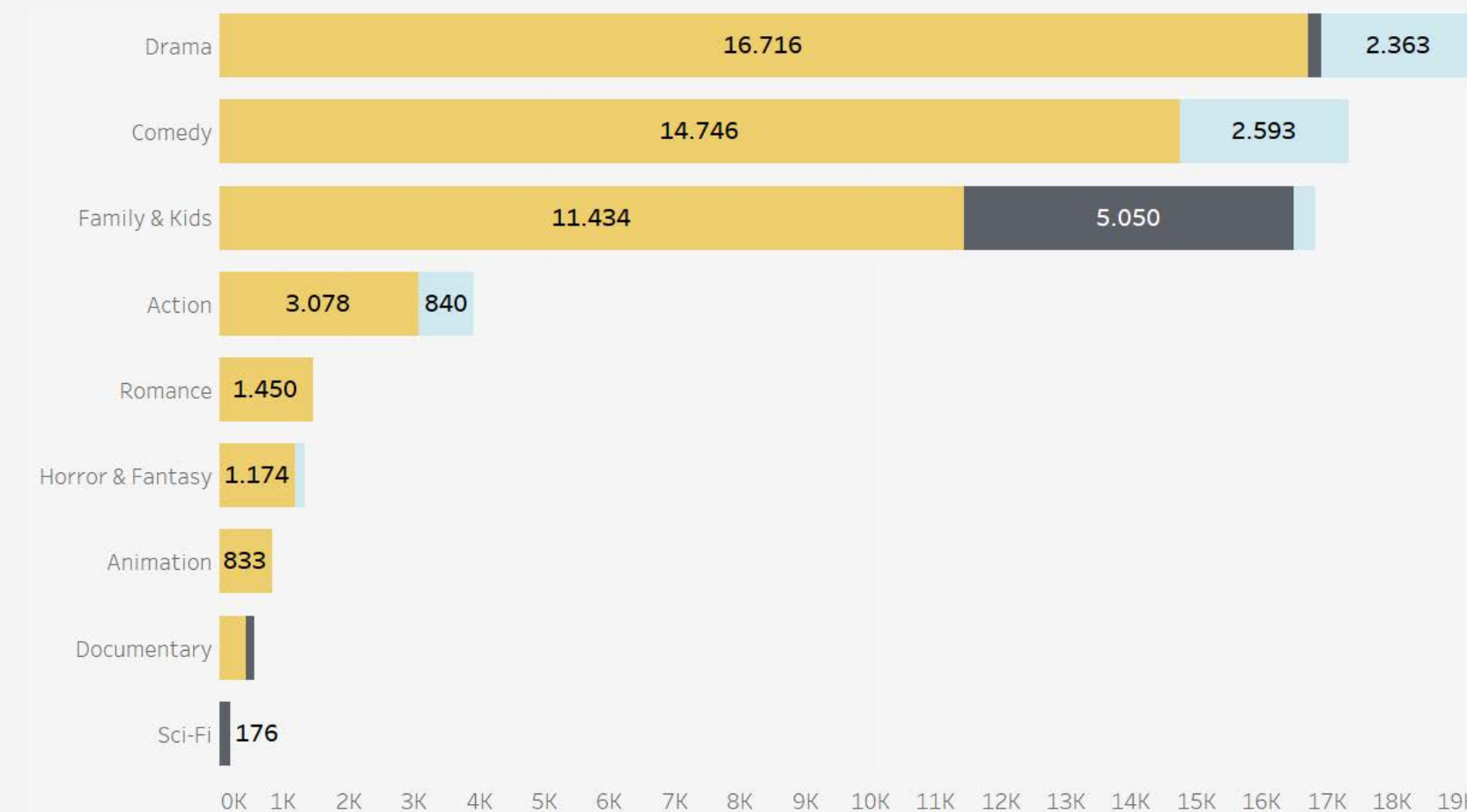
According to the latest report, French comedies have the highest viewing rate at 39% with a total of 6.5 million streams. However, this is a 27 point drop compared to the previous report. Despite this decrease, French comedies have still managed to secure the top spot in terms of genre popularity with "La Parisienne" heading the list (2.2M streams), "Five" and "School Life" manage to sit among Netflix's Top26. Drama was set as a leading role in the general Top100, but comedies won over the audience in the European top list.

FRANCE 100 MOVIES | SVOD PLATFORMS

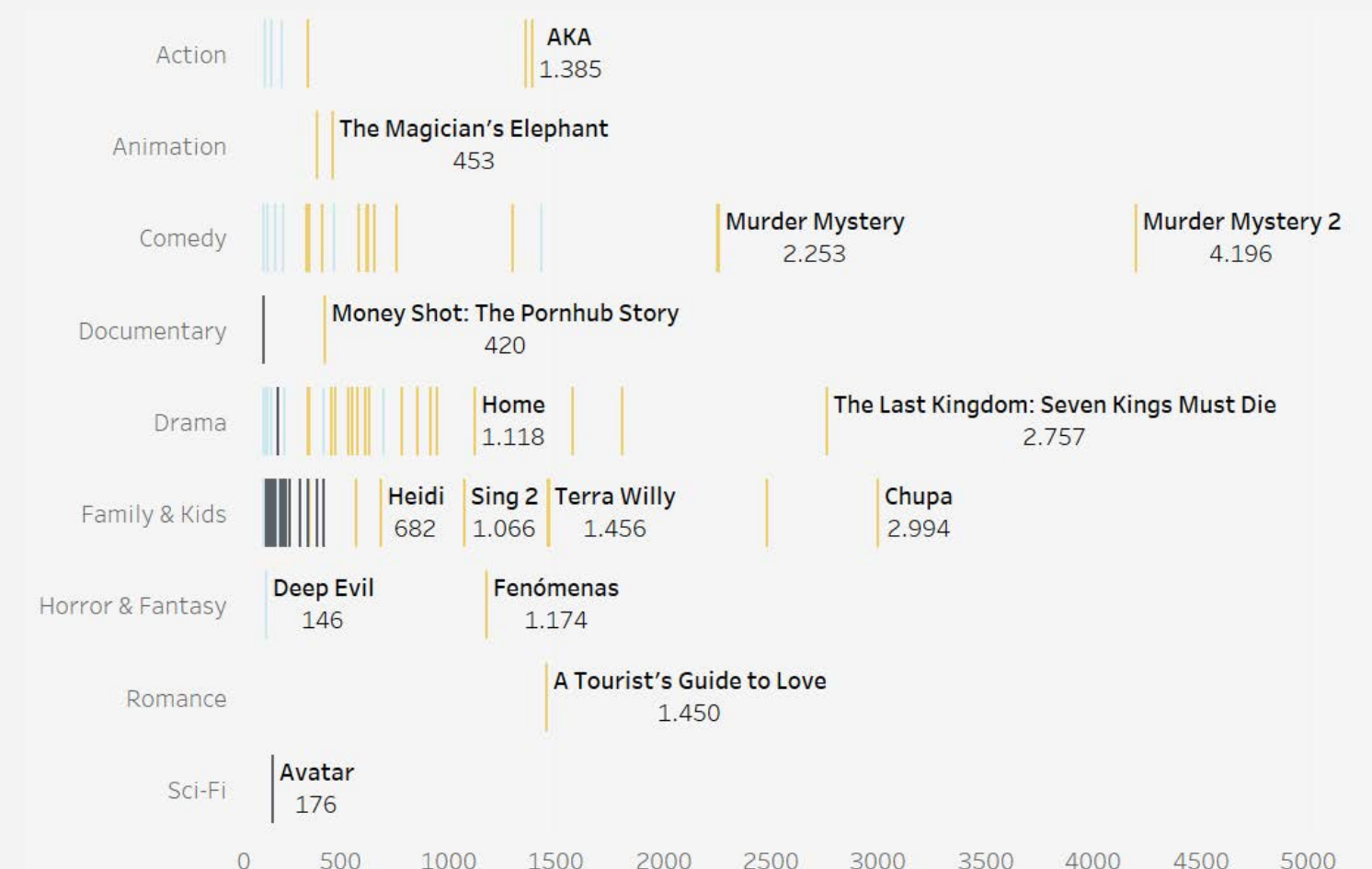
MOST WATCHED GENRES SHARE BY PLATFORM



TOTAL STREAMS BY GENRES PLATFORM COMPARATIVE



TOP MOVIES STREAMS BY GENRES



OTT: Amazon Netflix Disney+

DISNEY ± HIT BIG WITH 9% "FAMILY & KIDS" QUOTA

The Mickey Mouse company is skilled at providing household entertainment, achieving 5 million streams. However, titles on the Disney+ platform rank below the top 45, with "Tangled" being the most popular. The ever-on-going triumphant race between Netflix and Disney+ seems to be uneven in France, being the N streamer the champion with an 80% share of Top100. Amazon is competing side by side with Disney+ by capturing 10% of the viewing share. The e-commerce giant is finding success with comedies and dramas. Still, it dropped 7 points of share in the Top list compared to the previous month. While all others compete for second best, Netflix has content to fight in all departments: Drama amassed 24% (15M), followed by Comedy and Family & Kids with almost 19%.

Drama has a significant presence in the Top 100 list of streamed content. However, Comedy stands out with its impressive films, such as "Murder Mystery," which features Jennifer Aniston and Adam Sandler and promises to be fun. Prime Video's "Operation Fortune" sets the third-best comedy record with 1.4M streams.

FRANCE 100 SHOWS | OVERVIEW

TOTAL STREAMS BY SHOW

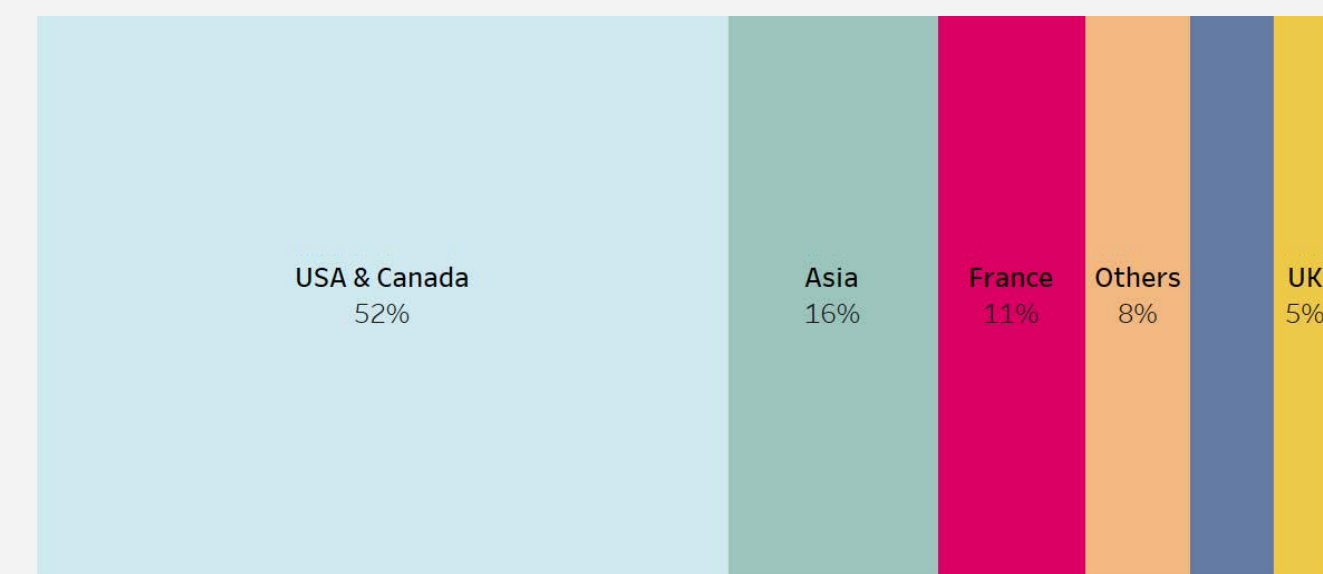
NETFLIX - AMAZON

SHOWS	PLATFORM	GENRE	STREAMS
1 The Night Agent	Netflix	Drama	30.157
2 Thicker Than Water	Netflix	Thriller	23.434
3 Naruto: Shippūden	Netflix	Animation	19.538
4 The Simpsons	Disney+	Animation	19.523
5 The Marked Heart	Netflix	Drama	17.746
6 The Blacklist	Netflix	Comedy	14.847
7 Malcolm in the Middle	Disney+	Family & Kids	13.474
8 Bluey	Disney+	Family & Kids	13.438
9 Beef	Netflix	Comedy	11.633
10 Bienvenidos a Edén	Netflix	Drama	11.002
11 PAW Patrol	Netflix	Family & Kids	10.648
12 Grizzly and the Lemmings	Netflix	Family & Kids	10.221
13 Grey's Anatomy	Disney+	Drama	7.586
14 The Mandalorian	Disney+	Sci-Fi	7.488
15 Designated Survivor	Netflix	Drama	7.415
16 Brooklyn Nine-Nine	Netflix	Comedy	7.287
17 Bones	Disney+	Family & Kids	6.876
18 Les Sisters	Netflix	Family & Kids	6.699
19 Un gars, une fille	Disney+	Comedy	6.512
20 Wellmania	Netflix	Comedy	6.446
21 The Diplomat	Netflix	Drama	6.438
22 Florida Man	Netflix	Drama	6.265
23 Obsession	Netflix	Drama	6.045
24 Attack on Titan	Netflix	Animation	5.436
25 Whom Were We Running ..	Netflix	Drama	5.396
26 Shadow and Bone	Netflix	Family & Kids	5.299
27 You	Netflix	Drama	4.987
28 Sonic Boom	Netflix	Family & Kids	4.437
29 Unstable	Netflix	Comedy	4.376
30 The Parisian Agency: Excl..	Netflix	Game-Show & Reality-TV	4.370
31 Unseen	Netflix	Drama	4.333

SHOWING 31/63 - [See complete chart here](#)

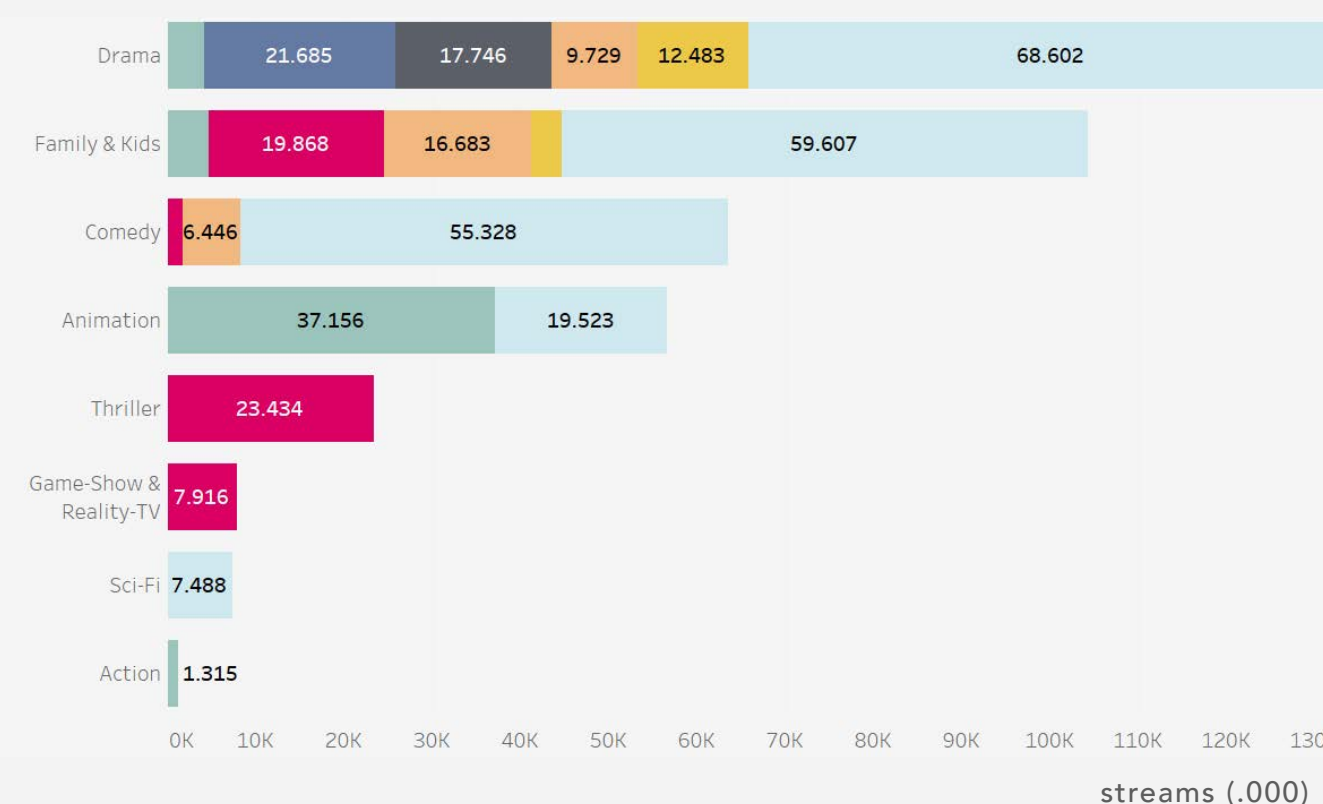
CATALOG SHARE BY COUNTRY

NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES

NETFLIX - AMAZON



US CONTENT DROPS 6 SHARE POINTS, LEAVING ROOM FOR ASIAN AND EUROPEAN CONTENT

Asian content rules the Animation genre with 37M streams and has some portions of Drama and Family & Kids with around 4M streams each. "Naruto" ranked second-best with 19.5M streams, while the next title is "Attack on Titan", with 5.4M sitting at position 24. LATAM content drives Drama's viewership with a unique show in the Top100 list: "The Marked Heart" collecting 17.7M streams.

SERIES DRAMA SING THE SONG WITH 32% TOP100 SHARE, TRANSLATING TO 127M

"The Night Agent", a dark Colombian romance and the Spanish "Bienvenidos al Edén" made the top 3 dramas and glowed among France's Top 10. British intense psychological drama shows "The Diplomat" and "Obsession" knew how to keep viewers on the edge of their sofas and ranked #21 and #23 over the 6M bar. Are Telenovelas somehow behaving as seasonal content in France? Last spring we also spotted a huge rise of telenovelas by spring. L'amour is in the air?

The leading Drama shows a slight decrease of 2 points, but Comedies have been increasing since February and now hold an 18% share, 6 points higher than the previous month's share.

PRODUCTION COUNTRIES: Usa & Canada Europe France Asia UK Latam Other

FRANCE 100 SHOWS | EUROPEAN FOCUS

LOCAL AND EUROPEAN SHOWS IN THE TOP 100

NETFLIX - AMAZON

SHOWS	POSITION	PLATFORM	COUNTRY	POSITION	GENRE	STREAMS
1 Thicker Than W..	1	Netflix	FR	2	Thriller	23,434
2 Bienvenidos a Edén	2	Netflix	ES	8	Drama	7,828
3 Grizzy and the Lemmings	1	Netflix	ES	44	Drama	3,174
4 Les Sisters	2	Netflix	FR	20	Family & Kids	4,635
5 The Parisian Ag..	1	Netflix	FR	15	Family & Kids	5,586
6 Public Enemy	3	Netflix	FR	9	Family & Kids	6,699
7 Transatlantic	1	Netflix	BE	23	Game-Show & Reality-TV	4,370
8 LOL, qui rit, sor..	1	Amazon	FR	32	Drama	3,742
9 Diamonds	3	Netflix	DE	33	Drama	3,677
10 Petit ours brun	1	Netflix	FR	1	Game-Show & Reality-TV	3,547
	1	Netflix	BE	42	Drama	3,265
	1	Netflix	FR	47	Family & Kids	2,948

FRENCH SERIES DRIVE MAJOR VIEWERSHIP WITH 14% TOTAL SHARE (53M STREAMS)

French Thriller “Thicker Than Water” secured the first spot with 23.4M streams, a significantly higher figure compared to the second-best Spanish show ‘Bienvenidos al Edén’ with 11M streams. This is the second most successful premiere a local show has had since 2021, based on the available data. The record-holder for the biggest premiere is ‘LOL, qui rit, sort!’ back in March 2023, with 33.4M streams.

This Netflix Original about a journalist’s life devolving into chaos represents 6% of total viewing share. This month, fans are doubly entertained by Djibril Zonga, who stars in both the French top movie “Les Misérables” and this show. “The Kretz Family”, who dominates the luxury real estate market for wealthy customers in Paris, amassed 4.3 million streams (2% total quota).

In comparison to movies, comedy series are not as popular. Only one comedy series made it to the Top 100 grid, with a total of 1.8 million streams. Does the audience matter the format?

CONTRIBUTION OF LOCAL & EUROPEAN SHOWS TO TOTAL STREAMS

NETFLIX - AMAZON

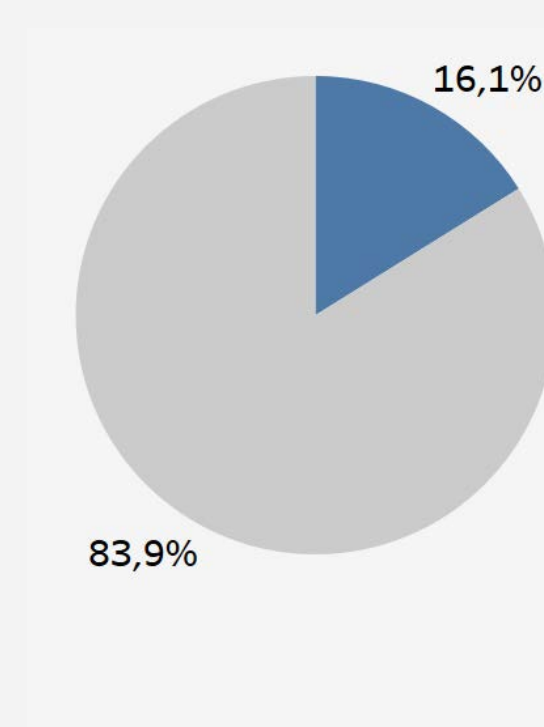


NUMBER OF TITLES BY GENRES

NETFLIX - AMAZON

GENRE	EU	FRANCE
Comedy		1
Drama	4	
Family & Kids		3
Game-Show & Reality-TV		2
Thriller		1

CONTRIBUTION TO DRAMA STREAMS



PRODUCTION COUNTRIES:

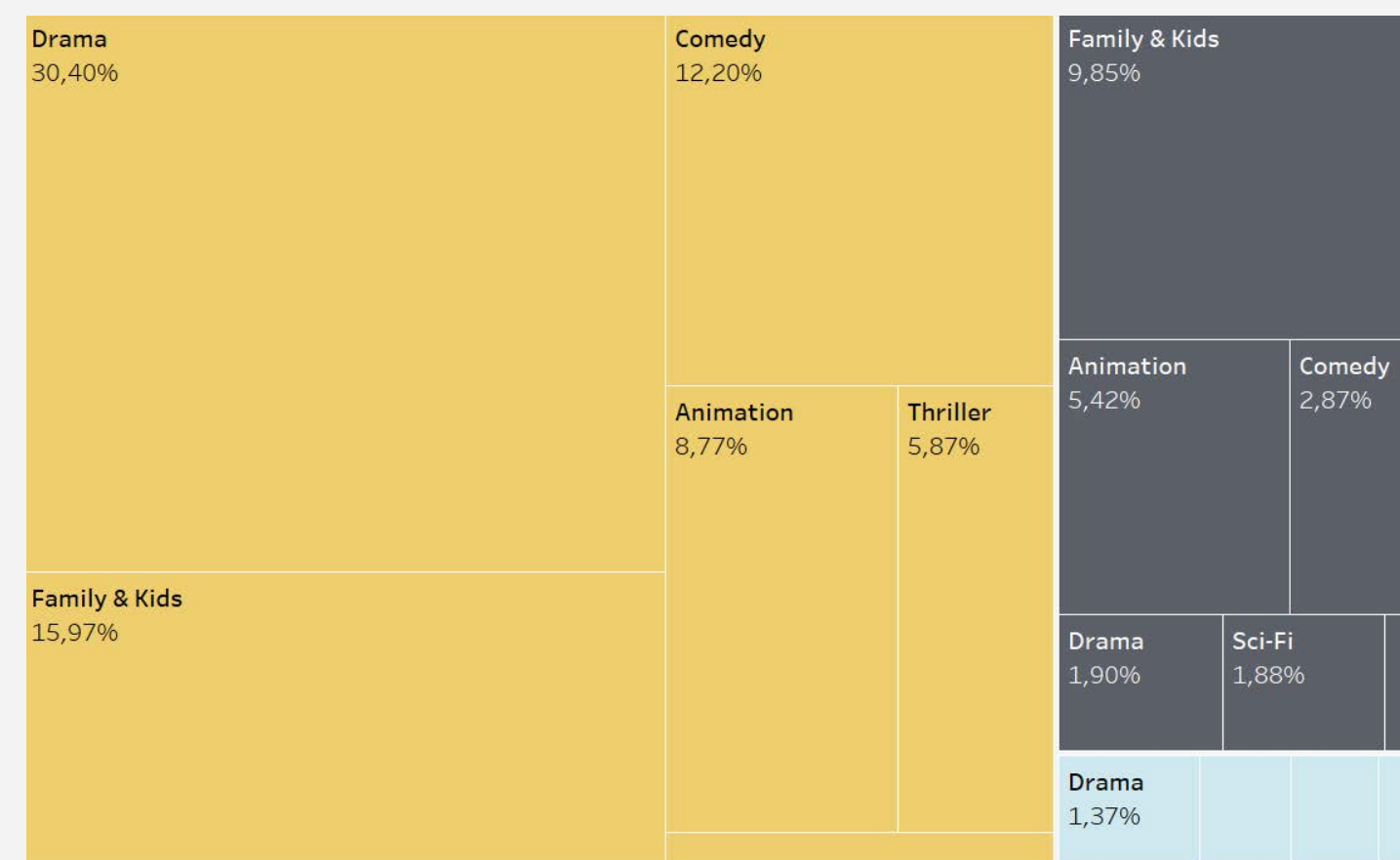


EUROPEAN CONTENT KEEPS THE BURDEN AND CLASSIFIES ONLY 4 DRAMAS IN THE TOP LIST

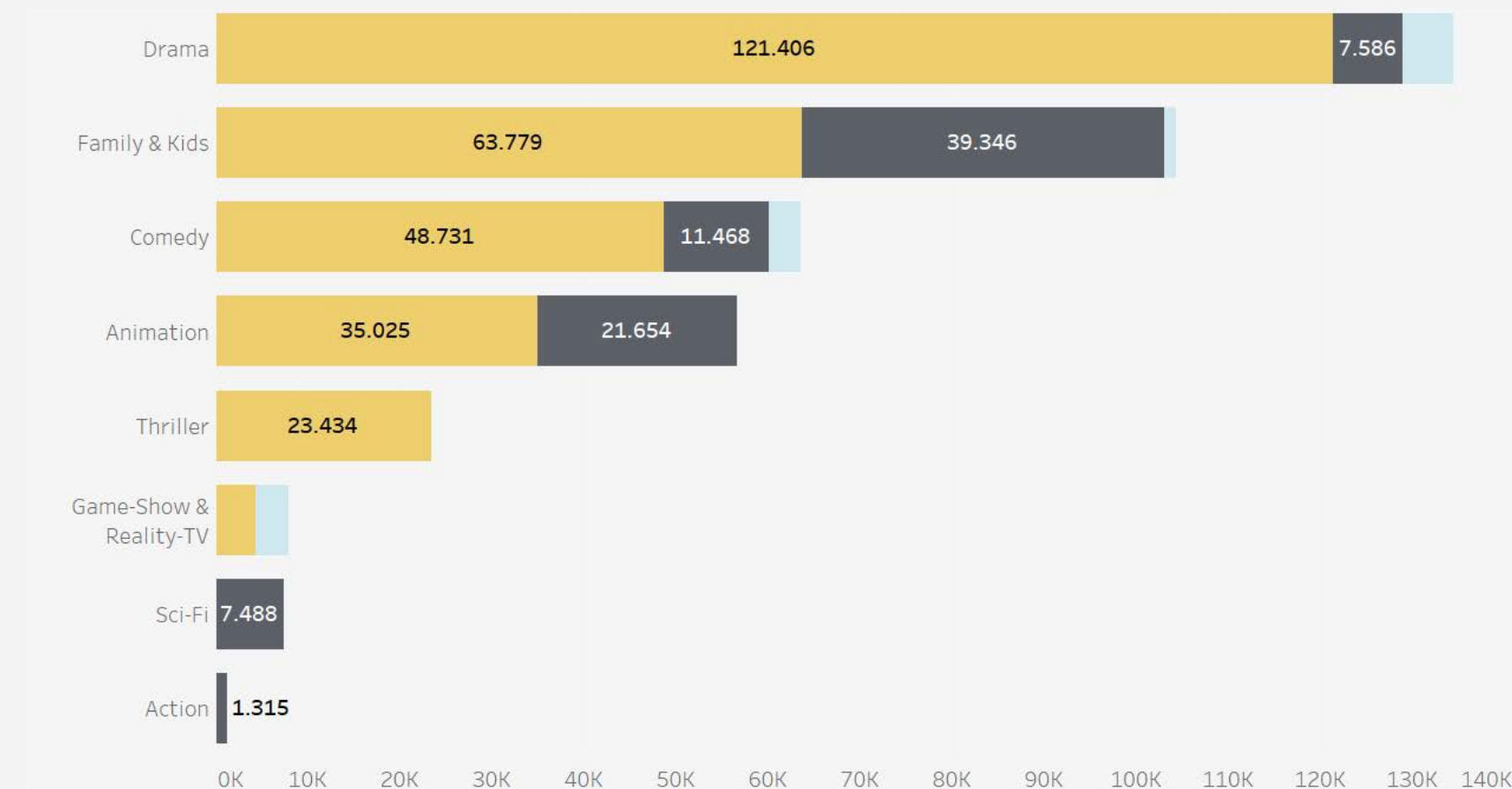
“Bienvenidos al Edén”, a drama-action series of influencers at the party on a secluded island has collected 19.3M streams. Following, the French-speaking Belgian “Public Enemy” and the German original “Transatlantic”, titles that reach respectively 3.7 and 3.6M.

FRANCE 100 SHOWS | SVOD PLATFORMS

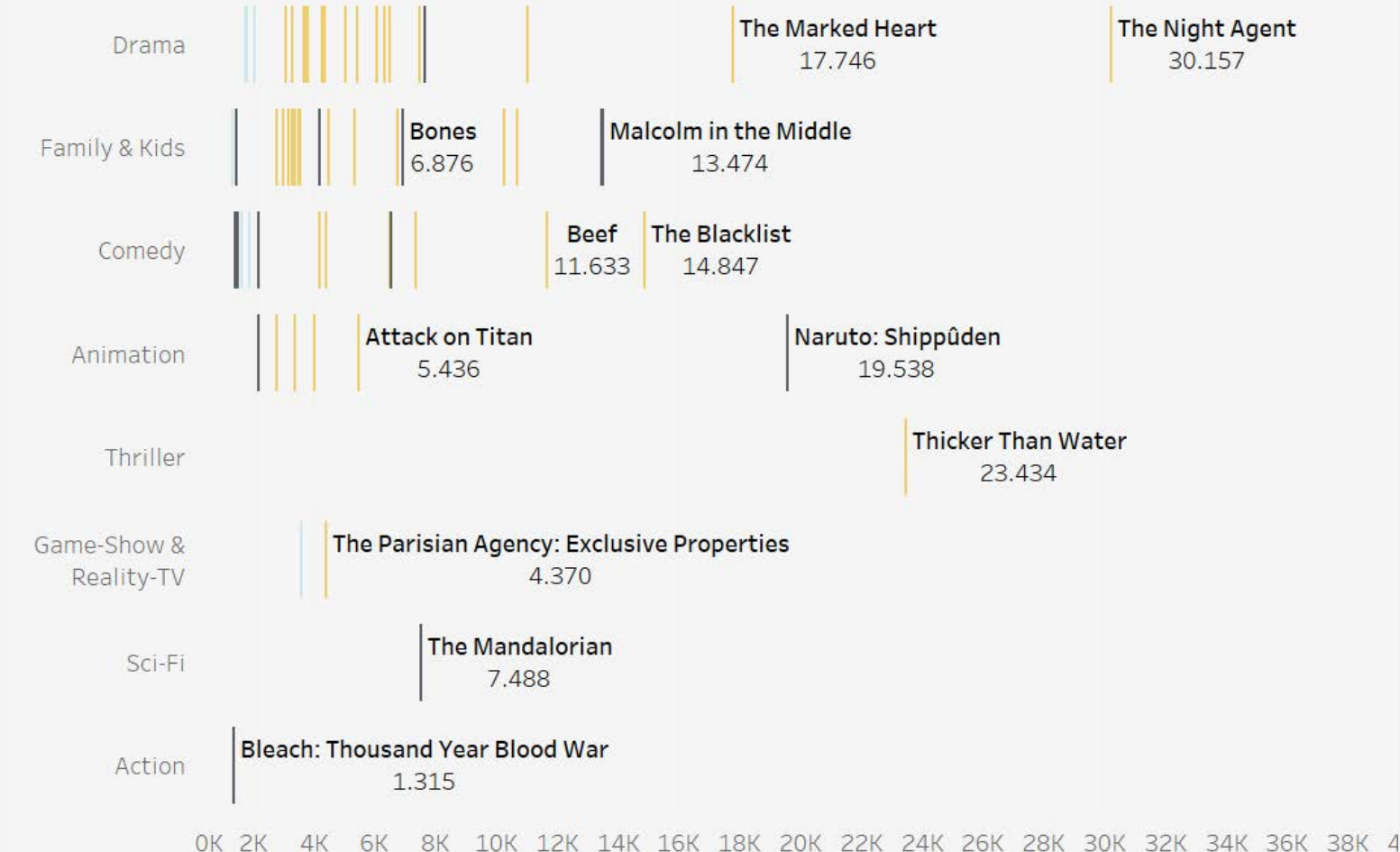
MOST WATCHED GENRES SHARE BY PLATFORM



TOTAL STREAMS BY GENRES PLATFORM COMPARATIVE



TOP SHOWS STREAMS BY GENRES



OTT: Amazon Netflix Disney+

DISNEY+ BOLSTERED ITS POSITION AS SERIES LEADER

The company bites Prime Video's portion of the cake and hits 22% of the viewing quota. Still the leading streaming company menaces Netflix leadership on family-friendly series, closely reaching the 10% quota. It's not a secret the Star Wars hit, "The Mandalorian" fights solo in the Sci-Fi genre with 7.4M streams, but, given its popularity and presence in social media conversations, it's surprising that it doesn't rank even higher, and it's not the gem of the catalogue in terms of top viewing rates.

Disney+ squeezed all-times "The Simpsons", "Malcolm in the Middle" and "Grey's Anatomy" proving that audiences will never be worn out of TV-hits. The company is currently strategizing on how to increase cash flow by promoting their Ad-tiers and licensing content to other companies. Additionally, they are focusing on attracting young adult audiences through their merger with Hulu.

Prime Video's only gathered around 13M streams, which implied a massive crash and burn of 19 points compared to the previous month. At the same time, Netflix experiences a bumpy month, gathering 4 points less than last month. Disney+'s entry has hit down competitor's Top100 shares.

HOT CONTENT IN FRANCE

NETFLIX IS EXPLOITING RURAL FOLK HORROR

CELIA FUMANAL
INNOVATION DIRECTOR



“FénoMENAS” is a Netflix Original movie that was released in 2023. It’s a Spanish horror movie that tells the story of three paranormal experts who face their most challenging case when their leader, Father Pilón, disappears. The movie is inspired by the Group Hepta, founded in Spain in 1987. Topgame talents such as Belén Rueda, Gracia Olayo, and Toni Acosta are the three paranormal investigators and, no doubt, one of the big assets of the production. The film landed at Global Top 5 non-English movies, and reported by the platform it recorded 4.8M hours viewed the first week. According to our report, the film totals 7M streams, setting Spain, France and Germany as top markets.

The film’s appeal and success can largely be attributed to its transparent portrayal of Iberian customs and the largely known Spanish movement Costumbrismo. From the scenery overflowing with traditional Catholicism to Belén Rueda’s iconic hairstyle, the Hepta group represents the relatable face of Spanish culture. This relatability makes the film a stepping stone to Iberian Folk Horror. Netflix has discovered that the hidden History of Spanish folklore is fascinating to the European public.

“ Netflix is capturing the rural terror blossom that European productions are heading to as the recent Spanish Goya’s awarded “Piggy” and “Veronica” (which also ranked at Netflix top last summer) demonstrate; the tendency has expanded to the so-called Elevated Horror.

Arthouse European movies are dominating festivals and showing a viewing force with examples such as Icelandic “Lamb”, Welsh “The Feast”, and of course Norwegian “Troll” which smashed the streaming records in 2022. Several new releases that turn rural environments and ancient belief systems into subjects for terror, are getting attention and breaking through the noise, proving that Europe has many genre-diverse stories to tell and that Netflix is always ready to use its magic in making them popular.

As a [Xataka’s article explores](#), Spain’s creative content has wide-ranging appeal. The platform produces fiction set in each new country it arrives in, ensuring productions that resonate with the audience. Their productions include ‘La Chica de Nieve,’ ‘Élite,’ ‘Intimidad,’ ‘El Inocente,’ ‘Los Favoritos de Midas,’ ‘Machos Alfa,’ ‘Sky Rojo,’ ‘La Casa de Papel,’ and ‘Bienvenidos a Edén.’ The platform has expanded its center near Madrid to support national production. Horror movies were once the young adults favourite content, but with the variety we are seeing shining as head of catalogue’s best performing content we know the demographic is ageing.

Looking around our mid-year EQUINOX report, we spotted Horror & Fantasy content is seasonal with peaks during Spooky seasons. In the past months it has been on the rise with an average of 6% quota of Top 100 movies.

The old tracks point out that in the 60’s American audiences got a feel for horror movies. As every big tendency in the film industry, it started in the heart of money. Back then rural terror flicks were not considered a niche; filmmakers were simply using horror codes to reflect the racial and spiritual changes.

American directors tapped into folk traditions in popular movies like “Children of the Corn” (1984) and “The Blair Witch Project” (1999). In the past decade the Folk Horror label has stuck, and the genre has garnered a devoted following and critical acclaim, thanks to films like Jayro Bustamante’s “La Llorona,” and especially the works of Ben Wheatley (“In the Earth”). [The New York Times](#) calls on the filmmaking records denoting that white-men are creating the narrative about white people’s anxieties. That’s why Jordan Peele’s “Get Out” was so significant to indicate the vacant spot.

We hope this spot will be soon claimed by a diversity of new and young talents.



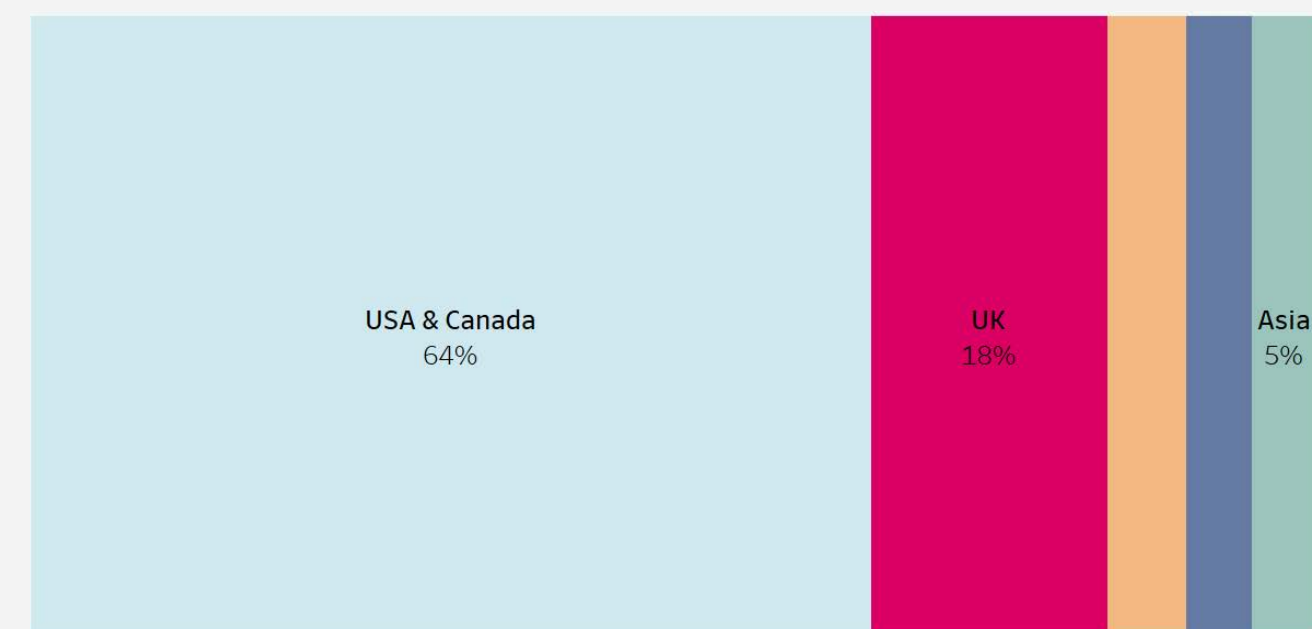
UK 100 MOVIES | OVERVIEW

TOTAL STREAMS BY MOVIE NETFLIX - AMAZON

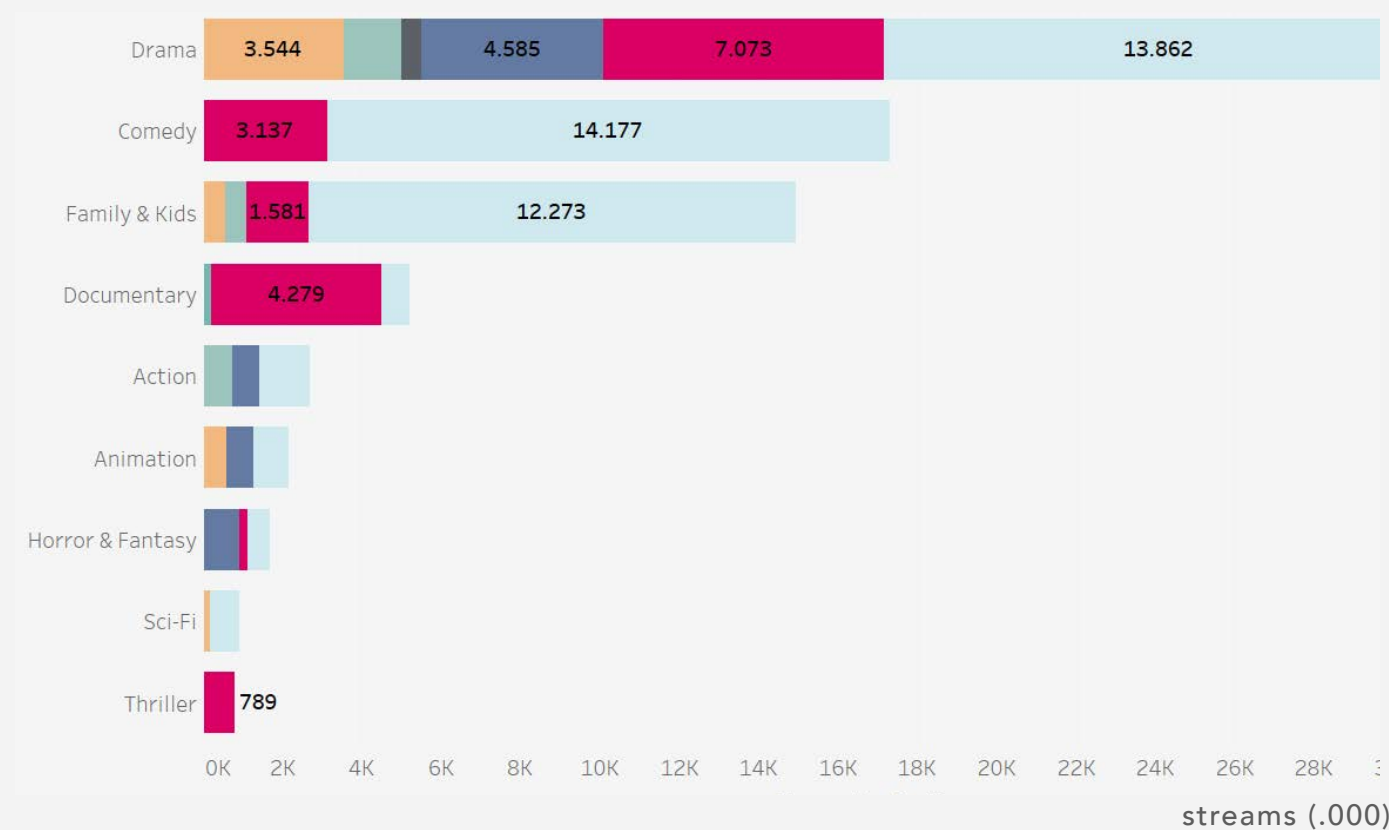
MOVIES	PLATFORM	GENRE	STREAMS	
1	Murder Mystery 2	Netflix	Comedy	7.164
2	Nobody	Netflix	Drama	4.435
3	Lewis Capaldi: How I'm Fe..	Netflix	Documentary	3.769
4	The Last Kingdom; Seven...	Netflix	Drama	3.350
5	Home	Netflix	Drama	3.117
6	Murder Mystery	Netflix	Comedy	2.988
7	Chupa	Netflix	Family & Kids	2.818
8	Monster Hunter	Netflix	Drama	2.665
9	Operation Fortune: Ruse ..	Amazon	Comedy	2.475
10	The Deep House	Netflix	Drama	1.921
11	A Quiet Place Part II	Netflix	Drama	1.839
12	2 Hearts	Netflix	Drama	1.611
13	Luther: The Fallen Sun	Netflix	Drama	1.364
14	The Whole Truth	Netflix	Drama	1.285
15	Thirteen	Netflix	Family & Kids	1.260
16	Noah	Netflix	Drama	1.170
17	A Tourist's Guide to Love	Netflix	Comedy	1.133
18	Hunger	Netflix	Drama	1.031
19	Fenómenas	Netflix	Horror & Fantasy	926
20	Hotel Transylvania 3: Sum..	Netflix	Family & Kids	911
21	Mindcage	Amazon	Drama	883
22	Wasteland	Netflix	Drama	823
23	Mighty Morphin Power Ra..	Netflix	Family & Kids	794
24	Fall	Netflix	Thriller	789
25	Kill Bok-soon	Netflix	Action	731
26	Colors of Love	Netflix	Comedy	722
27	Green Street Hooligans	Netflix	Drama	681
28	Minions & More 2	Netflix	Animation	680
29	AKA	Netflix	Action	678
30	Peter Rabbit 2: The Runa..	Netflix	Family & Kids	654
31	We Have a Ghost	Netflix	Family & Kids	629
32	Marmaduke	Netflix	Family & Kids	628
33	The SpongeBob SquarePa..	Netflix	Family & Kids	606
34	Traffic	Netflix	Drama	586
35	Back to the Outback	Netflix	Animation	581
36	White House Down	Netflix	Documentary	572
37	Saw	Netflix	Horror & Fantasy	562
38	Three Thousand Years of ..	Amazon	Family & Kids	558
39	Everything Everywhere Al..	Amazon	Comedy	539
40	Hotel Transylvania	Netflix	Family & Kids	512
41	Matilda	Netflix	Family & Kids	511

SHOWING 41/100 - [See complete chart here](#)

CATALOG SHARE BY COUNTRY NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES NETFLIX - AMAZON



MULTINATIONAL PRODUCTIONS AND FAMILY ADVENTURES RISING IN THE RANKING

Stories linked to real characters are very well positioned in the ranking. In this case "Lewis Capaldi: How I'm Feeling Now" is ranking third with 3.7 million views.

In the ninth spot, we find a multinational production (UK, USA, Indonesia, China, and Turkey). It's "Operation Fortune: Ruse de Guerre," a film internationally released on the Amazon platform on April 7th, with 3.1M views. Prior to that, the film had a limited theatrical release.

Like in other territories, the most popular film in the Family & Kids category is "Chupa", holding the seventh position with 2.8 million views. Produced by 26th Street Pictures, it tells the story of a boy visiting his grandparents in Mexico and befriending a magical creature. Notably, the film was directed by Jonas Cuarón, son of Alfonso Cuarón, the director of "Roma".

Interestingly, the Disney platform ranks 58th with "Frozen II" having received 294K.

PRODUCTION COUNTRIES: Usa & Canada Europe UK Asia Other Latam

UK 100 MOVIES | EUROPEAN FOCUS

LOCAL AND EUROPEAN MOVIES IN THE TOP 100

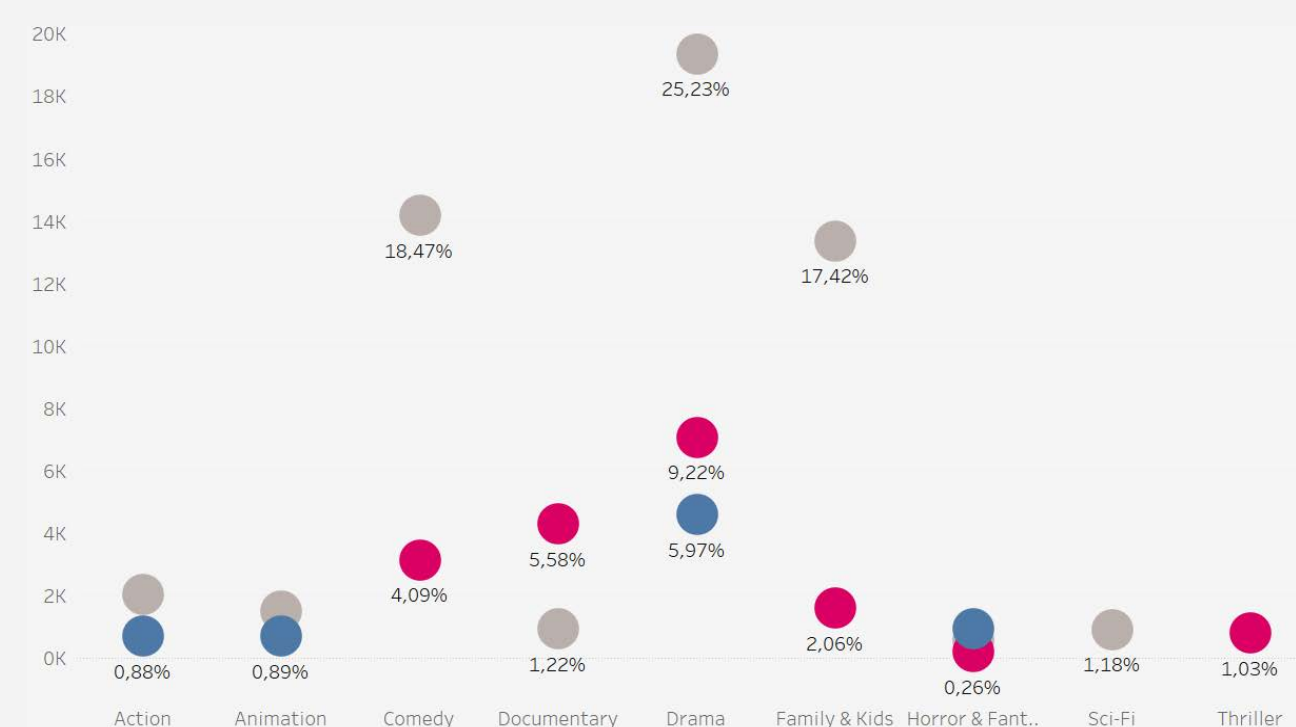
NETFLIX - AMAZON

MOVIES	PLATFORM	POSITION	GENRE	STREAMS
1 Lewis Capaldi: How I'm Fe...	Netflix	UK	Documentary	3,769
2 The Last Kingdom: Seven ...	Netflix	UK	Drama	3,350
3 Monster Hunter	Netflix	DE	Drama	2,665
4 Operation Fortune: Ruse ...	Amazon	UK	Comedy	2,475
5 The Deep House	Netflix	FR	Drama	1,921
6 Luther: The Fallen Sun	Netflix	UK	Drama	1,364
7 Thirteen	Netflix	UK	Family & Kids	1,260
8 Fenómenas	Netflix	ES	Horror & Fantasy	926
9 Wasteland	Netflix	UK	Drama	823
10 Fall	Netflix	UK	Thriller	789
11 Green Street Hooligans	Netflix	UK	Drama	681
12 Minions & More 2	Netflix	FR	Animation	680
13 AKA	Netflix	FR	Action	678
14 The Gentlemen	Netflix	UK	Documentary	510
15 Crossing the Line	Netflix	UK	Drama	433
16 Fisherman's Friends 2	Amazon	UK	Comedy	279
17 The Son	Amazon	UK	Drama	256
18 Kick-Ass	Amazon	UK	Comedy	216
19 When the Lights Went Out	Amazon	UK	Horror & Fantasy	203
20 Room on the Broom	Amazon	UK	Family & Kids	170

SHOWING 20/23 - See complete chart here

CONTRIBUTION OF LOCAL & EUROPEAN MOVIES TO TOTAL STREAMS

NETFLIX - AMAZON

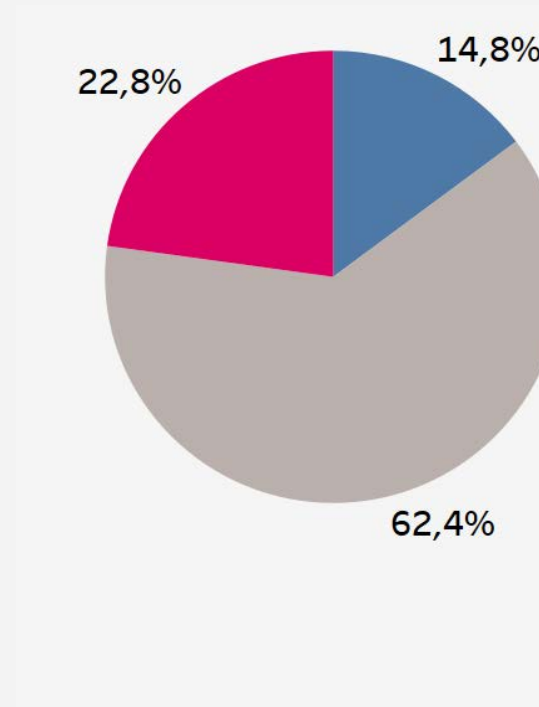


NUMBER OF TITLES BY GENRES

NETFLIX - AMAZON

GENRE	EU	UK
Action	1	
Animation	1	
Comedy		3
Documentary		2
Drama	2	7
Family & Kids		3
Horror & Fantasy	1	1
Thriller		1

CONTRIBUTION TO DRAMA STREAMS



PRODUCTION COUNTRIES:

Europe UK Others

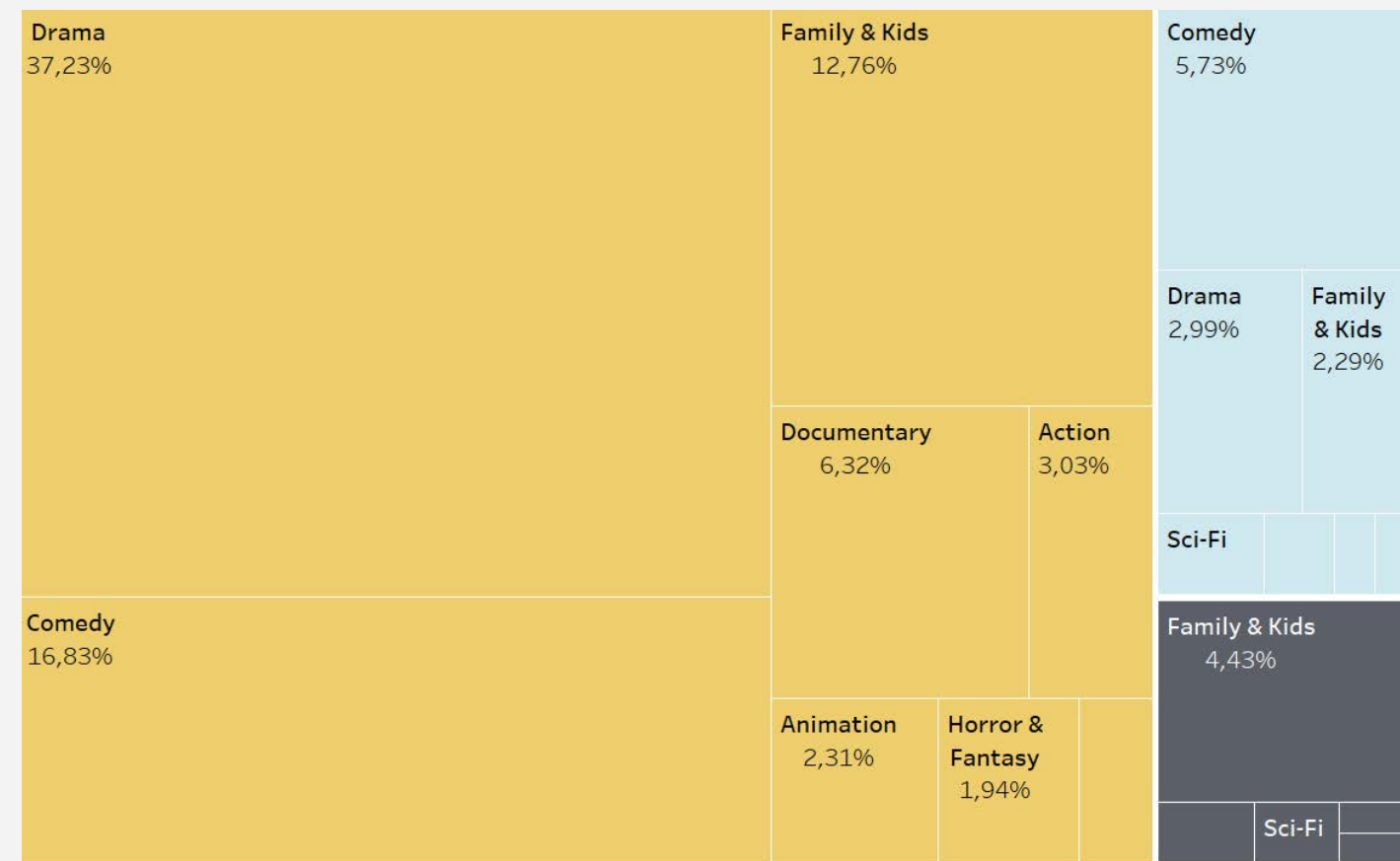
ADAPTATIONS INSPIRED BY REAL EVENTS CONSISTENTLY MAINTAIN HIGH RANKINGS

The movie "Seven Kings Must Die" has reached 3.3 million views, making it one of the most popular contents of the moment. It is a British historical drama directed by Edward Bazalgette, based on the novel "The Saxon Stories" by Bernard Cornwell. This genre has proven to be attractive to the public, and the adaptation of a well-known literary work has generated great interest among viewers.

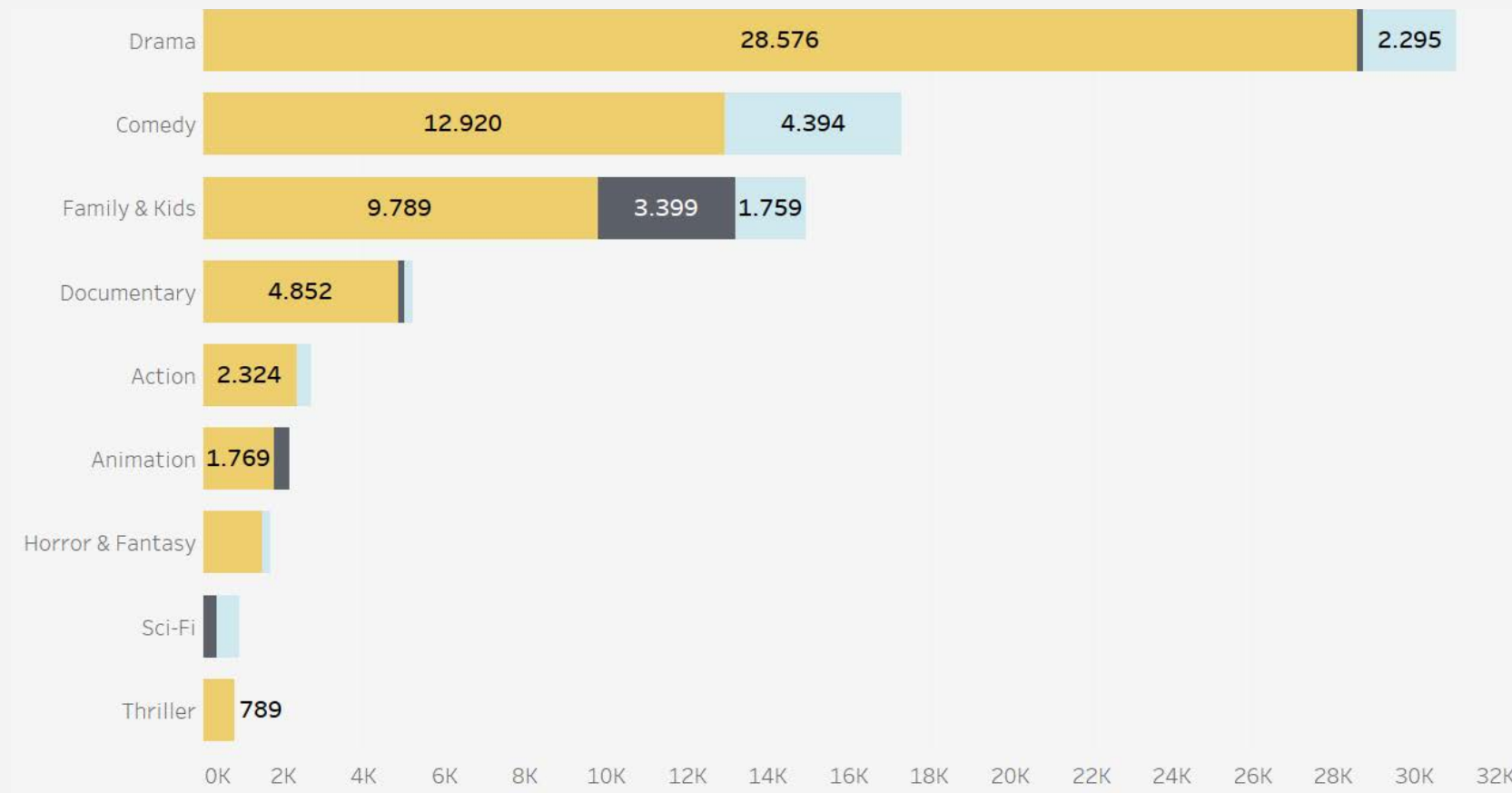
On the other hand, we find the Spanish series "Fenómenas," which has achieved an outstanding position in the ranking with 926K views, occupying the 8th position. This production is framed in the supernatural horror comedy genre and stands out for having a female cast. It adapts the stories of the Hepta Group, a real team that still exists today. Its premiere on Netflix on April 14 has been well received by subscribers across all five territories analysed. This follows and strengthens the success of recent Spanish content, as was the case with "La Chica de Nieve" in recent months.

UK 100 MOVIES | SVOD PLATFORMS

MOST WATCHED GENRES SHARE BY PLATFORM



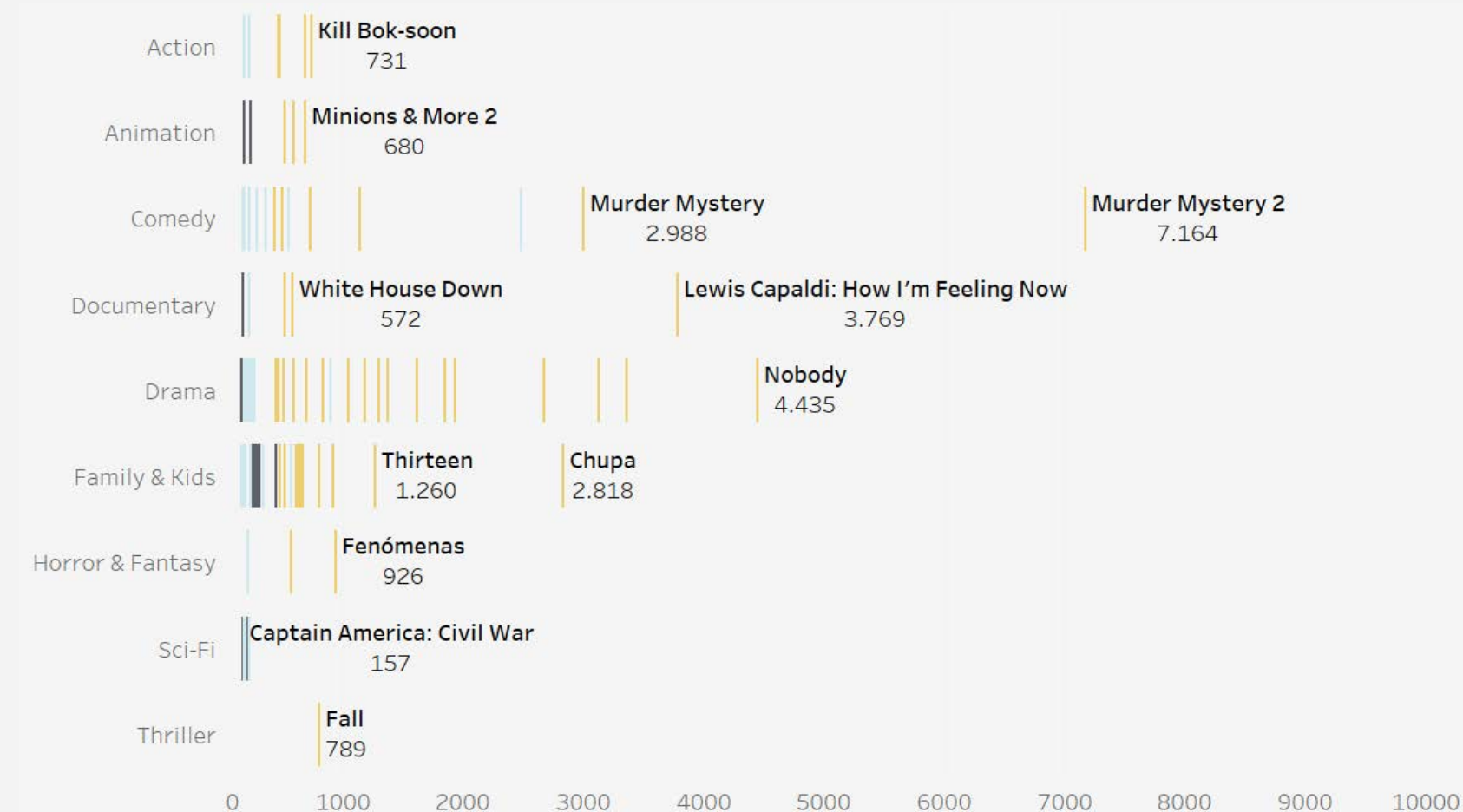
TOTAL STREAMS BY GENRES PLATFORM COMPARATIVE



DRAMA EMERGES AS THE MOST POPULAR GENRE ACROSS ALL PLATFORMS

On Netflix, Drama accounts for 37.23% of the total viewership (28.5 million views), while Comedy follows with 16.83% (12.9 million views). The standout title is 'Nobody' with 4.4 million views, which garnered \$55 million in global box office revenue upon its release in 2021, hitting the platform on April 13. On Amazon, Comedy takes the lead with 5.73% (4.3 million views), closely trailed by Drama with 2.99% (2.2 million views). The noteworthy film on Amazon is 'Operation Fortune: Ruse de Guerre' mentioned earlier. When it comes to the Family & Kids genre, Netflix captures the majority of views with 12.7% (9.7 million views) of the total. Conversely, on the Disney platform, Family & Kids genre dominates as the most watched category, constituting 4.43% of the total viewership, equivalent to 3.3 million views. Animation lags significantly behind with a mere 0.51%. Notable titles in this genre include "Lilo & Stitch" with 429k views, "Beauty and the Beast" with 277k views, "Bolt" with 250k views, "Cars" with 244k views, and "Zootopia" with 184k views.

TOP MOVIES STREAMS BY GENRES



OTT: Amazon Netflix Disney+

UK 100 SHOWS | OVERVIEW

TOTAL STREAMS BY SHOW

NETFLIX - AMAZON

SHOWS	PLATFORM	GENRE	STREAMS
1 Friends	Netflix	Comedy	58.500
2 The Night Agent	Netflix	Drama	45.655
3 Brooklyn Nine-Nine	Netflix	Comedy	42.313
4 Modern Family	Disney+	Comedy	35.573
5 Beef	Netflix	Comedy	32.270
6 The Big Bang Theory	Netflix	Comedy	30.529
7 Young Sheldon	Netflix	Family & Kids	23.253
8 The Simpsons	Disney+	Animation	19.545
9 Bluey	Disney+	Family & Kids	18.540
10 Family Guy	Disney+	Animation	14.621
11 The Mandalorian	Disney+	Sci-Fi	13.823
12 Obsession	Netflix	Drama	13.608
13 The Diplomat	Netflix	Drama	13.231
14 Love Is Blind	Netflix	Game-Show & Reality-TV	13.084
15 Grey's Anatomy	Disney+	Drama	12.154
16 PAW Patrol	Netflix	Family & Kids	10.427
17 Peppa Pig	Netflix	Family & Kids	10.113
18 Star Trek: Picard	Amazon	Comedy	9.450
19 Unstable	Netflix	Comedy	7.593
20 Wellmania	Netflix	Comedy	7.289
21 Florida Man	Netflix	Drama	6.272
22 Pokémon	Netflix	Family & Kids	6.151
23 Grizzy and the Lemmings	Netflix	Family & Kids	5.991
24 Bread Barbershop	Netflix	Family & Kids	5.865
25 Black Money Love	Netflix	Drama	5.210
26 You	Netflix	Drama	5.134
27 Firefly Lane	Netflix	Drama	5.104
28 Shadow and Bone	Netflix	Family & Kids	5.005
29 Welcome to Wrexham	Disney+	Documentary	4.913
30 Breaking Bad	Netflix	Drama	4.787

SHOWING 30/48 - [See complete chart here](#)

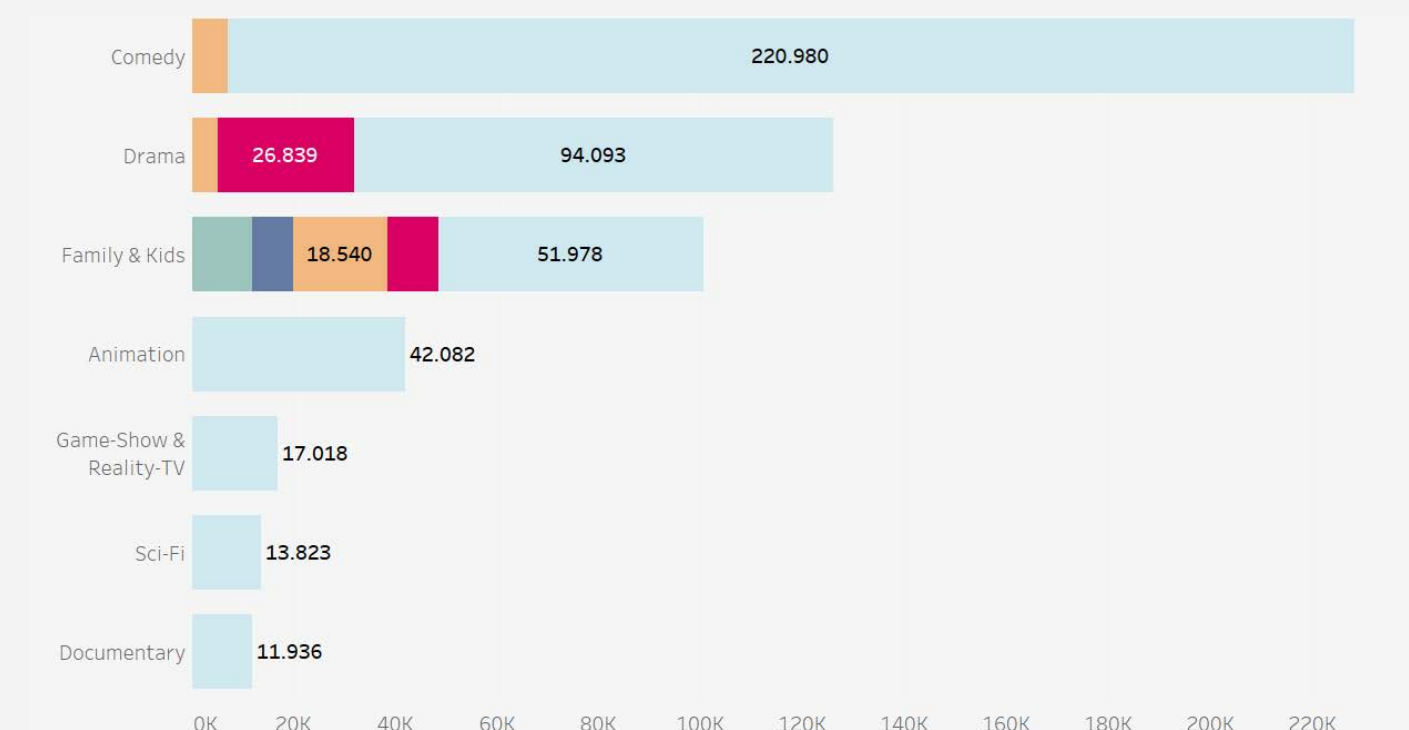
CATALOG SHARE BY COUNTRY

NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES

NETFLIX - AMAZON



streams (.000)

PRODUCTION COUNTRIES:



COMEDY REIGNS SUPREME

The UK market has reached its peak this April, amassing a remarkable amount of 540M streams this month, solidifying its position as the largest European market. In this massive territory, Comedy is once again, as it has done since July 2022, the most popular genre, maintaining its reign this month with 44.5% of streams. Popular shows like "Friends," "Brooklyn Nine-Nine," "Modern Family," and "Beef" have contributed to this success.

NORTH AMERICAN PRODUCTIONS BREAK RECORDS

A significant 83.7% share comes from USA & Canada productions, leaving local shows with a modest 6.8% share, and setting a new record: North American content, with a staggering amount of 451M views, has achieved the highest number of streams ever recorded, not only in the UK but across all markets.

UK 100 SHOWS | EUROPEAN FOCUS

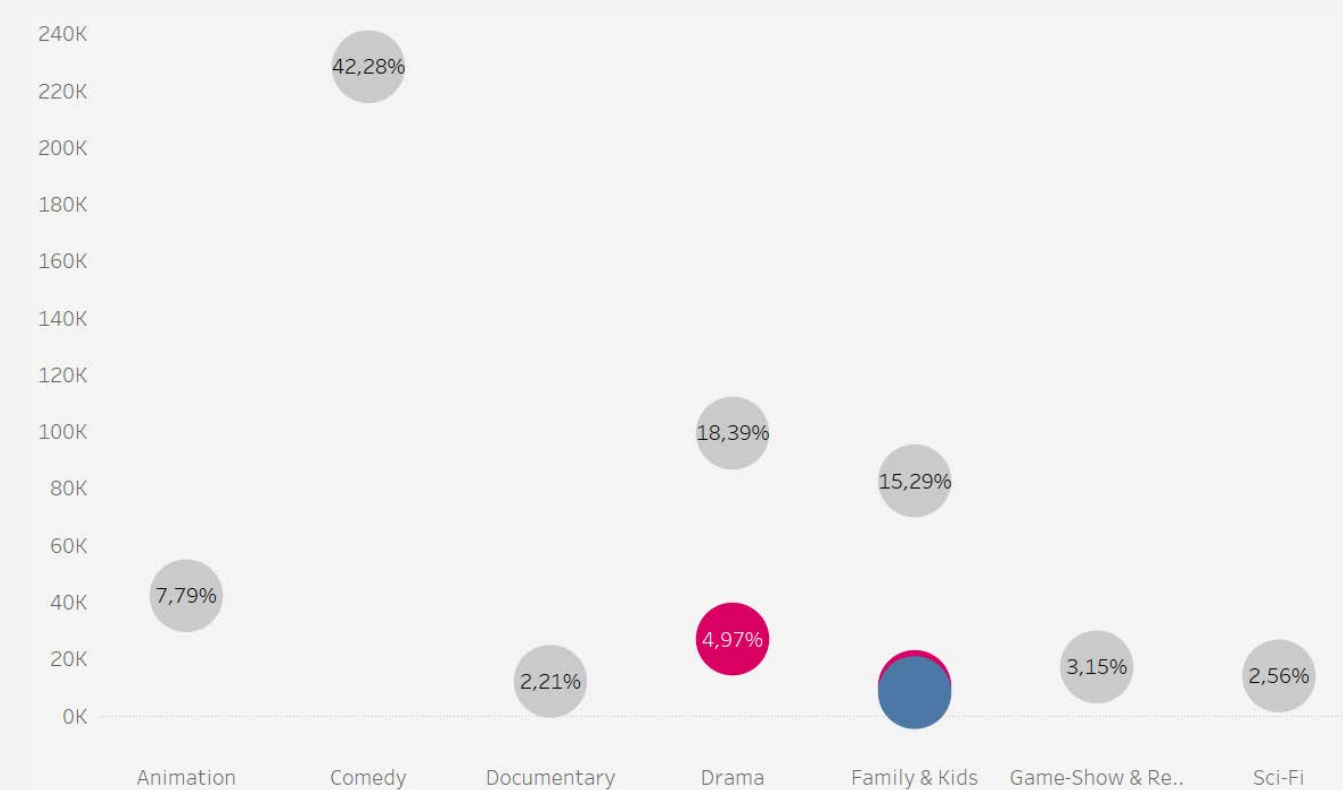
LOCAL AND EUROPEAN SHOWS IN THE TOP 100

NETFLIX - AMAZON



CONTRIBUTION OF LOCAL & EUROPEAN SHOWS TO TOTAL STREAMS

NETFLIX - AMAZON

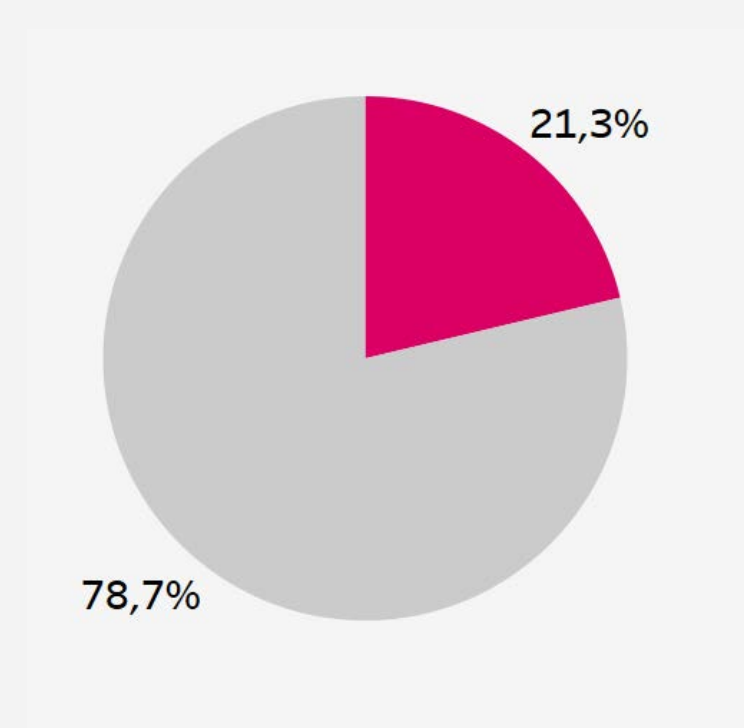


NUMBER OF TITLES BY GENRES

NETFLIX - AMAZON

GENRE	EU	UK
Drama		2
Family & Kids	2	1

CONTRIBUTION TO DRAMA STREAMS



PRODUCTION COUNTRIES: ■ Europe ■ UK ■ Others

LOCAL SHOWS FILLED WITH DRAMA

"Obsession", a series based on Josephine Hart's novel "Damage" (1991) and produced by Gaumont Film Company and Moonage Productions, has amassed an impressive score of 13.6 million viewers.

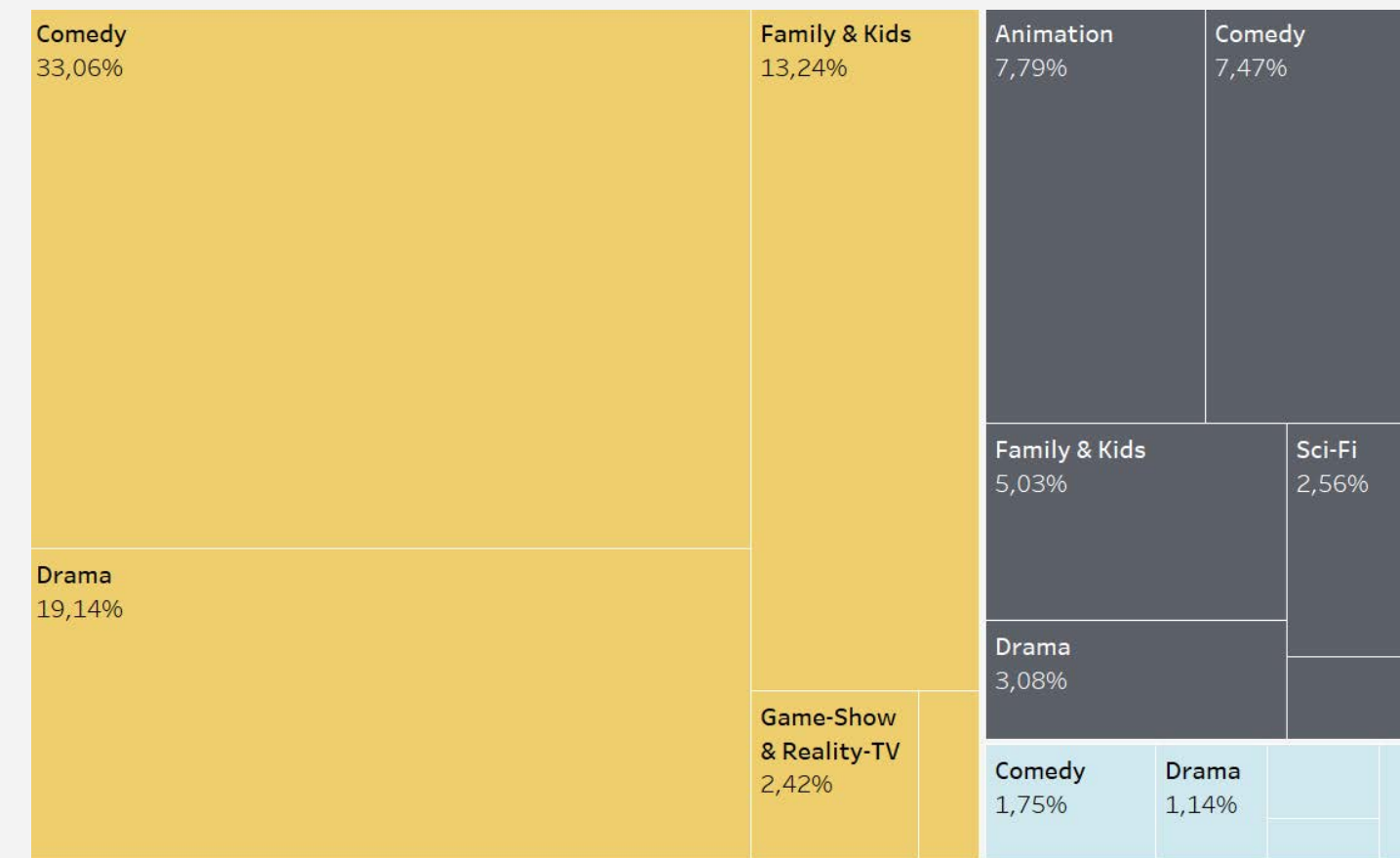
On the other hand, "The Diplomat," created by the talented Debora Cahn, renowned for her work on shows like "Homeland", "The West Wing", "Grey's Anatomy" and "Vinyl" premiered on Netflix on April 20. The series has received widespread acclaim, leading to its renewal for a second season in May 2023, solidifying its position as a fan favourite.

In addition to these hits, the popular "Peppa Pig" and its lovable family and friends still accumulated streams: 10.1M views this month and 18.5M in 2023.

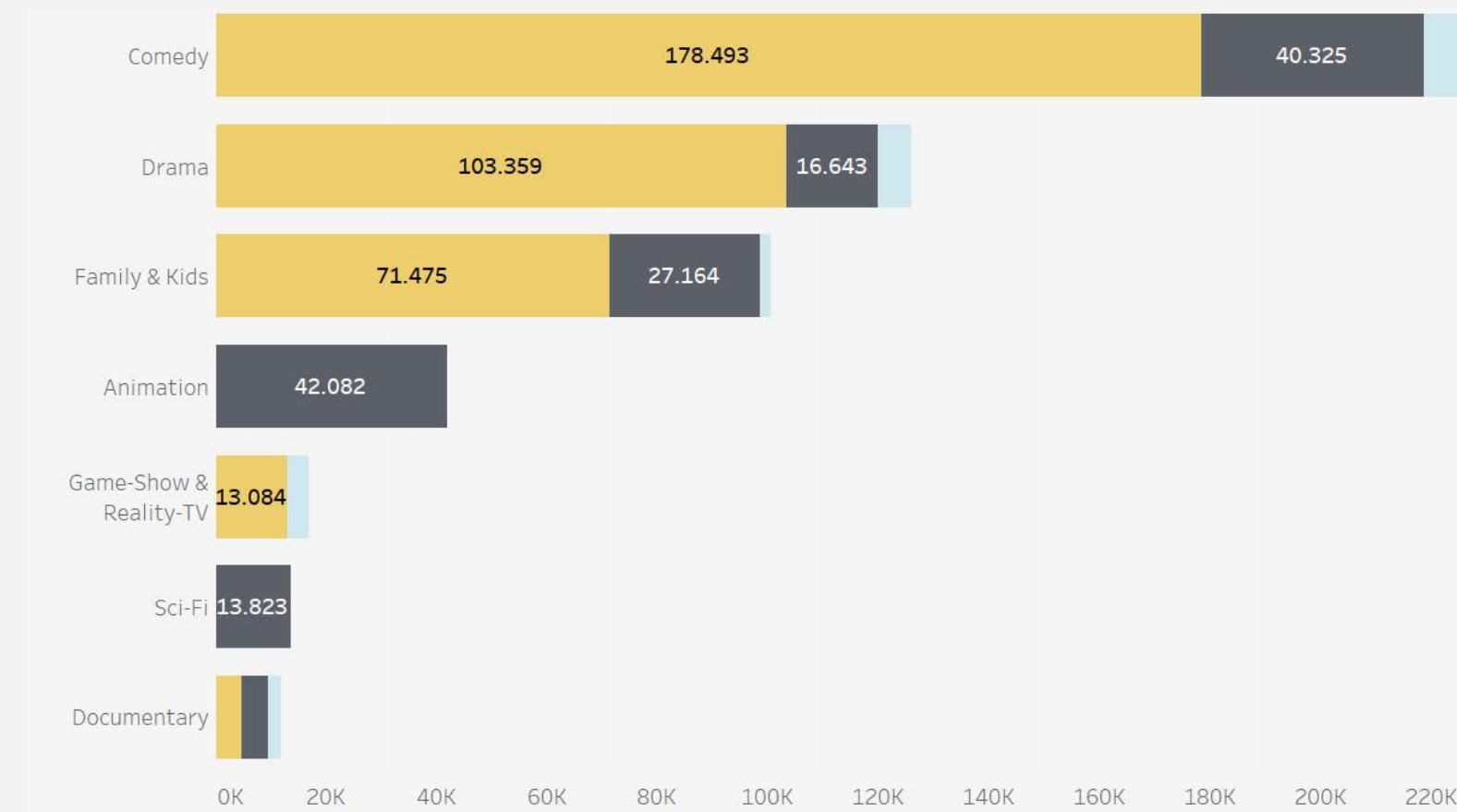
Notably, this month's Top 100 features European productions in the Kids' content category. To explore more about the most attractive characters in preschool content, don't miss the latest Hot Title where our partner Digital-I analyses comparative trends amongst the most popular titles of this genre.

UK 100 SHOWS | SVOD PLATFORMS

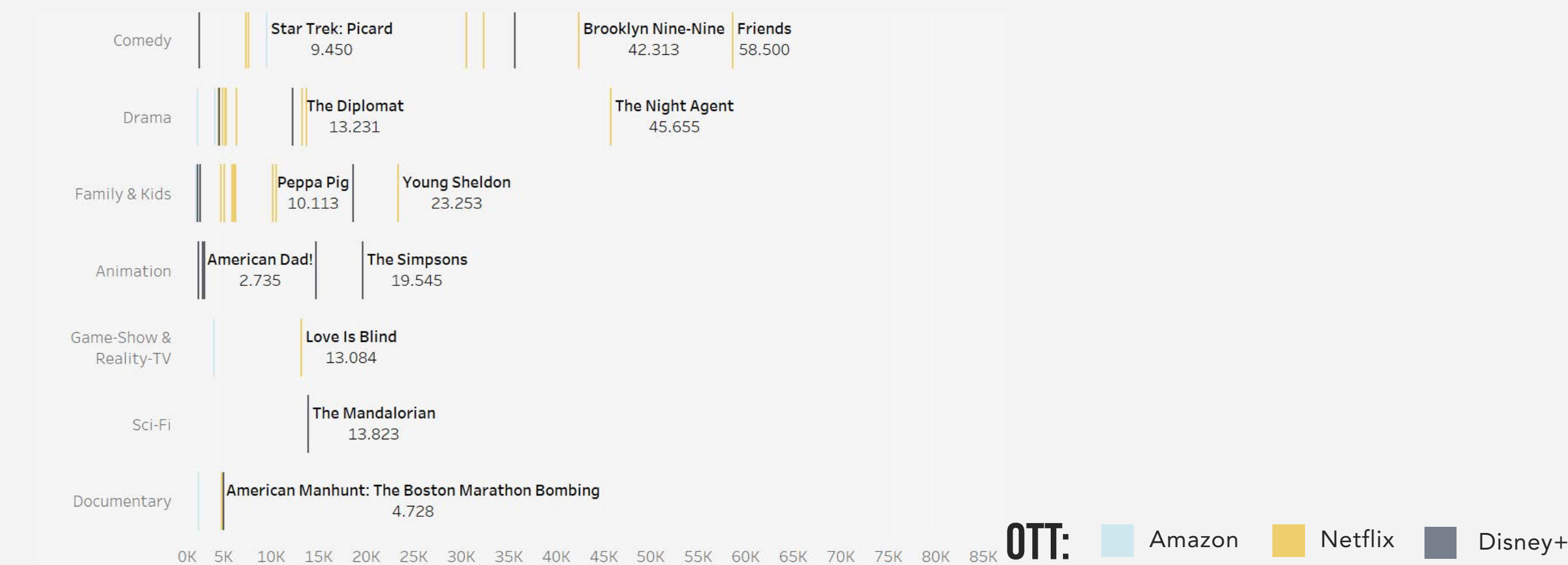
MOST WATCHED GENRES SHARE BY PLATFORM



TOTAL STREAMS BY GENRES PLATFORM COMPARATIVE



TOP SHOWS STREAMS BY GENRES



DISNEY+ ENTRY MAKES AMAZON STRUGGLE TO COMPETE

In the UK market, Disney has made a notable entry in our data puzzle, capturing a substantial 26.85% share, positioning it as the second largest market following Italy. Meanwhile, Amazon holds a more modest 4.41% share. It is evident that Amazon's presence in the UK, alongside France, pales in comparison to other players in the market, where the e-commerce content works much better in Top #100.

Similar to trends observed in other markets this month, the Animation genre has witnessed significant growth in the UK. This growth can be largely attributed to Disney's entry, which has propelled the genre from zero to an impressive 7.8% share of total streams. Disney's presence has clearly resonated with viewers, driving the genre's success in the UK market.

SPECIAL ISSUE

NETFLIX PRESCHOOL: WE KNOW WHAT GREAT LOOKS LIKE, BUT WHAT ABOUT GOOD?

Right now, everyone building a preschool kids' brand wants to be CoComelon, Bluey or, more recently, Gabby's Dollhouse. There's a marked and understandable tendency to focus ambitions on where the big hitters are at. I hear it from clients, and they hear it from their management. I heard it from management myself on the regular when I was working in corporate: "Why can't this show be more like PAW Patrol? Or Peppa Pig?!"

While it's right and relevant to set your dreams on being the biggest of the big, this mindset is not necessarily practical or helpful when you're launching a series or brand from scratch. Even if you're going for more of a silver medal place (Little Angel, Blippi, PJ Masks) the entire podium generally have one thing in common: they've all been around for a number of years. Gabby's Dollhouse stands out as the series that has achieved franchise status in the most efficient time period – just two years – and that has the full force of DreamWorks behind it.

Tracking these early steps of a franchise build can be tricky after the fact. In streaming, there's only a lucky handful that pop in various top 10 rankings, so divining learnings or effective strategies is hard. Thinking about factors like number of episodes, season cadence and marketing without knowing how they impacted performance is wasted energy. That's why, when the good folks at Digital i asked me to

write for them again, I knew this was an area I wanted to unpack.

Gabby's Dollhouse Gives Us a Benchmark

This show was given the star treatment by DreamWorks, even before launch. And DreamWorks know what they're doing here, having overseen the only other streaming-originated show that has driven anything close to a true franchise, Spirit Riding Free.

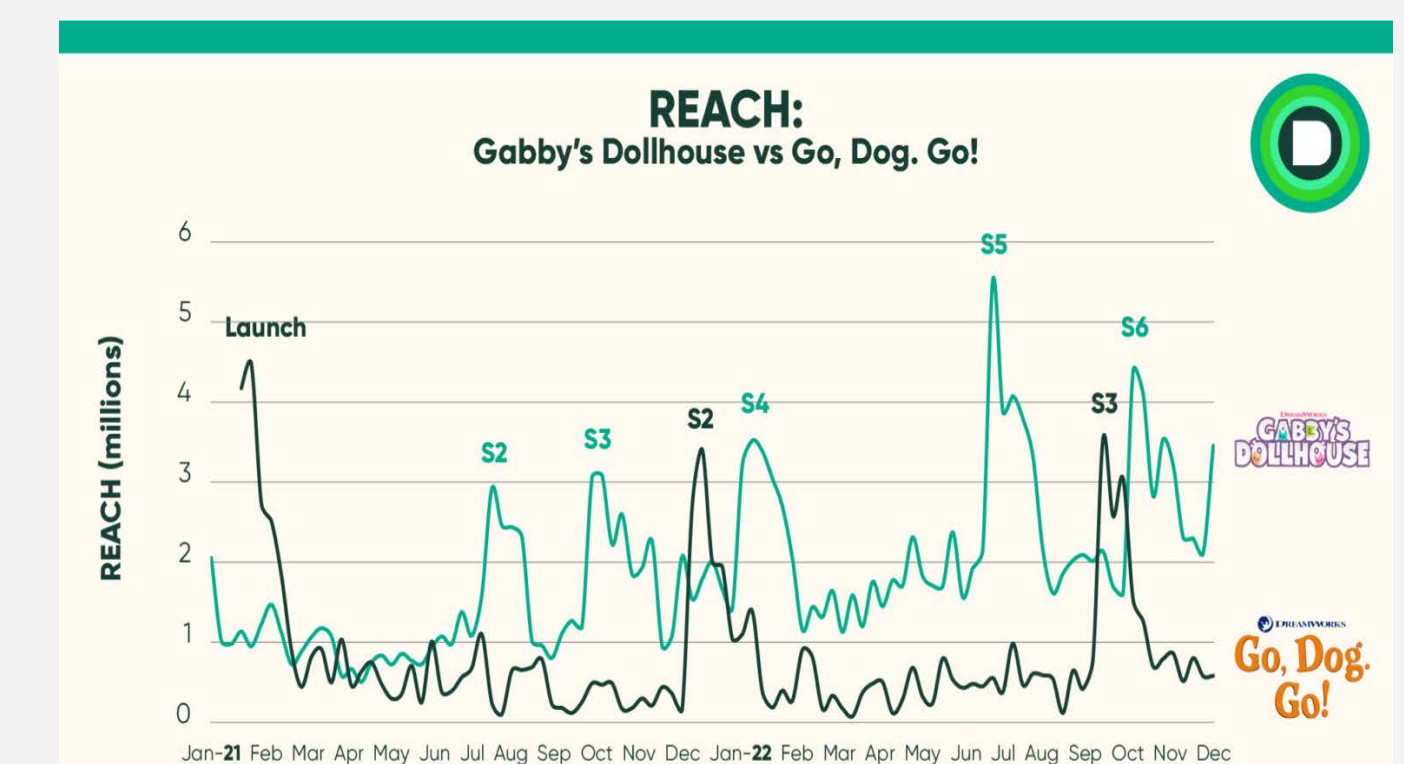
Digital i have recently launched US data on their system, backdating to December 2022, so we ran the whole of 2021 and 2022. Market-wise, the data analysed below covers this region, plus the UK, France, Italy, Germany and Spain. In terms of metrics, we captured Viewer Minutes – a weighted consumption metric of total minutes viewed.

Gabby's Dollhouse Vs. Go, Dog. Go!

First up is Go, Dog. Go! This show launched three weeks after Gabby's Dollhouse in late January 2021. It also came from DreamWorks Animation Television, but was a co-production with WildBrain Studios. In early months Digital i data shows Go, Dog. Go! as out in front of Gabby's Dollhouse (this is where we need to keep that repeat

viewing caveat in mind). Comparable data from Nielsen Streaming Content Ratings in the US, which captures this repeat viewing, had things the other way around. Go, Dog. Go! did well, but Gabby was definitively out in front.

Where Gabby clearly does build is in later months. This was helped by speedier episode roll-out. Subsequent season releases were optimised, in terms of timing and volume, to meet the strategic needs of the forthcoming toy launch. The second batch of episodes hit at the end of summer and more in October. Whereas, Go, Dog. Go! would have to wait until December before seeing any new content.



SPECIAL ISSUE

Another thing we can see here is the typical consumption curve for preschool content on streaming: big lifts for new episodes, compounding momentum when volume, fandom and marketing all pull. Go, Dog. Go! is still bringing in notable viewership with fresh seasons, and is on a potential build ramp. They just need to keep the new episodes coming.

Ridley Jones

A few months after Gabby's Dollhouse came the first Netflix Original preschool series from high-profile showrunner Chris Nee. Nee had been poached from Disney Junior where she had led the force on brand-defining titles like Doc McStuffins and Vampirina.

Ridley Jones is very much in the typical Nee signature style: high-end 3D animation, with music at the heart. It was animated by Brown Bag Films in Dublin, who had been instrumental in her hits of the past. to wait until December before seeing any new content.

The show earned the accolade of being the first preschool series Netflix actually premiered on their Netflix Jr. YouTube channel. Netflix went for it, hard, with a significant marketing investment. The launch episode clocked over 20 million views on YouTube, enough to eat a marketing budget of a couple of hundred thousand dollars at least. And you can't say it didn't pay off. Digital i data shows the Ridley Jones launch was strong. The drop-off was more substantial, though. This

wouldn't have been helped by the fact that Ridley came out of the gate with much fewer available episodes than Gabby.

The Creature Cases Vs. Sharkdog

The Creature Cases and Sharkdog both came to my attention following outstanding launches on Netflix which pushed their performance into the Global Hours Viewed Top 10. They globally delivered 25 million and 34 million hours viewed respectively across two weeks. The only other preschool shows to feature in this ranking are CoComelon, Little Angel and Gabby's Dollhouse.

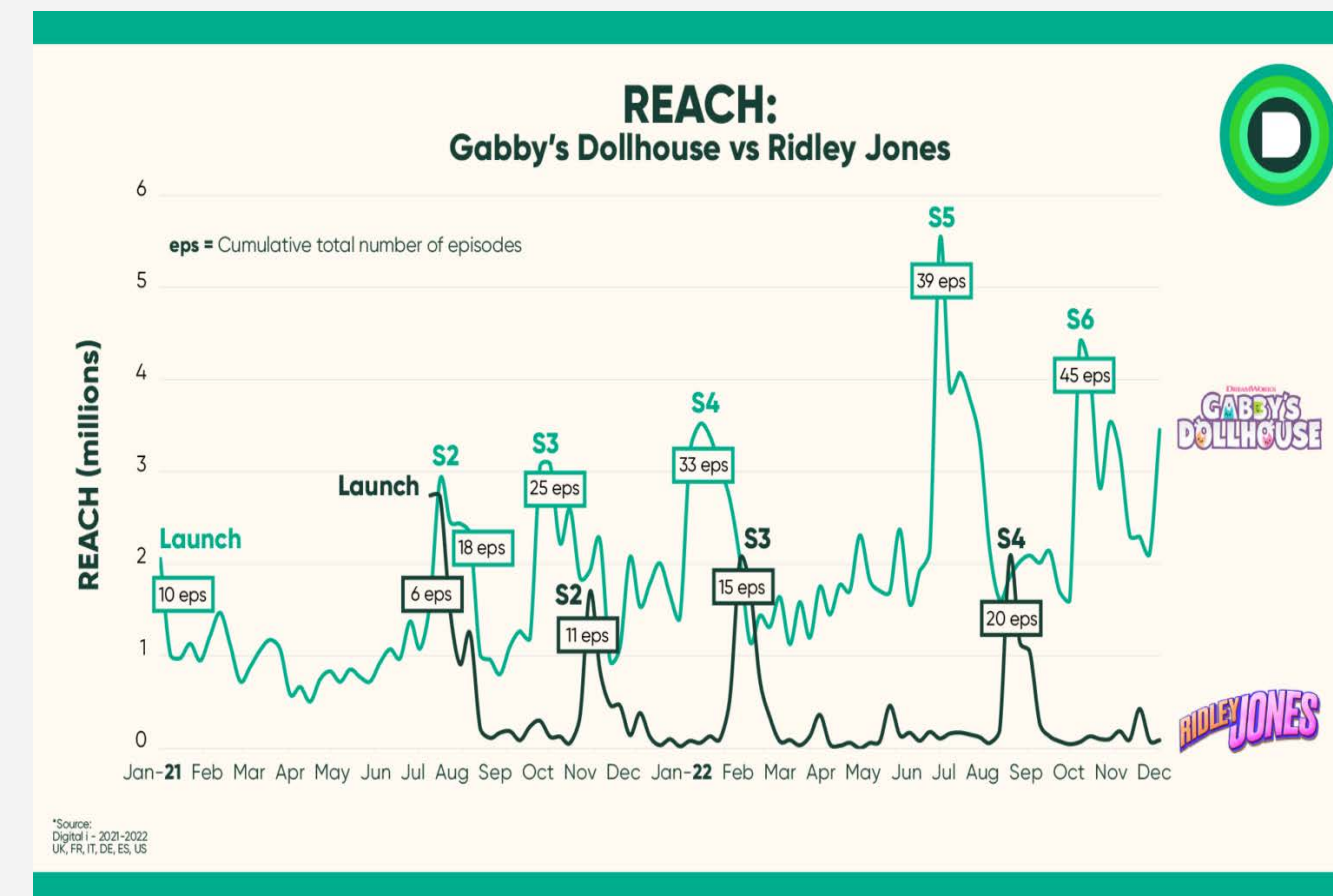
The Creature Cases is produced by Sony Pictures Television – Kids. This division was created when Sony Pictures Television

acquired Silvergate Media in 2019. This came with a great track record in creating hit kids' content like Octonauts and Hilda. The producer of Sharkdog also has somewhat of a track record. You may have heard of them, they're called Nickelodeon.

Launch success for both series holds true in Digital i data where we can see viewership roar. The Creature Cases had good ongoing engagement after launch, and clear demand when the single Christmas episode dropped. Sharkdog fell harder, not really buoyed by a Halloween special a few months after launch, though season 2 came back strong. But could this question about episode count be the crux of the issue?

Takeaway

We know that Gabby's Dollhouse has been given the whole shebang from DreamWorks in terms of marketing, PR, franchise, you name it. Having said that, boiling things down to real basics, it had an obvious advantage before any of those happened. The show quickly reached a critical volume of content. When you map it out over the various series life cycles, it's really clear. Gabby hit 25 episodes before its first year was done.



SPECIAL ISSUE

Back in the heyday of linear, this type of volume would have been quite typical, particularly with preschool content. A linear season order, usually 20 – 26 episodes, would have rolled out over 12 – 15 months; and to clarify further, a 20-ep order would DEFINITELY be done in 12 months.

Netflix Preschool Series Roll Outs Aligning Year 1/2

The advent of streaming brought all sorts of squiffiness as to what constitutes a 'season'. In linear, marketing was more commonly focused around 'new episodes'. Streaming is in favour of 'season' comms, which, is a more appealing message for the consumer.

In reality, content volumes come home to roost no matter what your terminology. Audiences, particularly kids, need enough to get their teeth stuck into. That applies for both launch (where volume was lighter on Ridley Jones and Sharkdog) and ongoing (like poor Creature Cases). Obviously, things like marketing factor in; was Ridley's splashy YouTube spend better than the more diversified run up of Gabby? It would seem at the end of the day, what you're driving folks to, needs to be enough to get them immersed.

I guess the question is, why does Netflix keep roll-out volumes so stingy? Animation production pipelines can definitely be painful, with things often going over. Add localised production into 34 languages and delays are

practically guaranteed. But you need to hold your nerve and go with what will make the content work. Particularly when, like Netflix, your sole focus is your platform, unlike Disney where series might need to stay in line with commitments across businesses like consumer products and parks.

Unfortunately, it's not like producers can dictate content roll-out to platforms, though you might think DreamWorks held some leverage. It's just confusing that Netflix wouldn't prioritise giving their content investments the best possible chance of success. Success that's been proven possible by Gabby's Dollhouse.

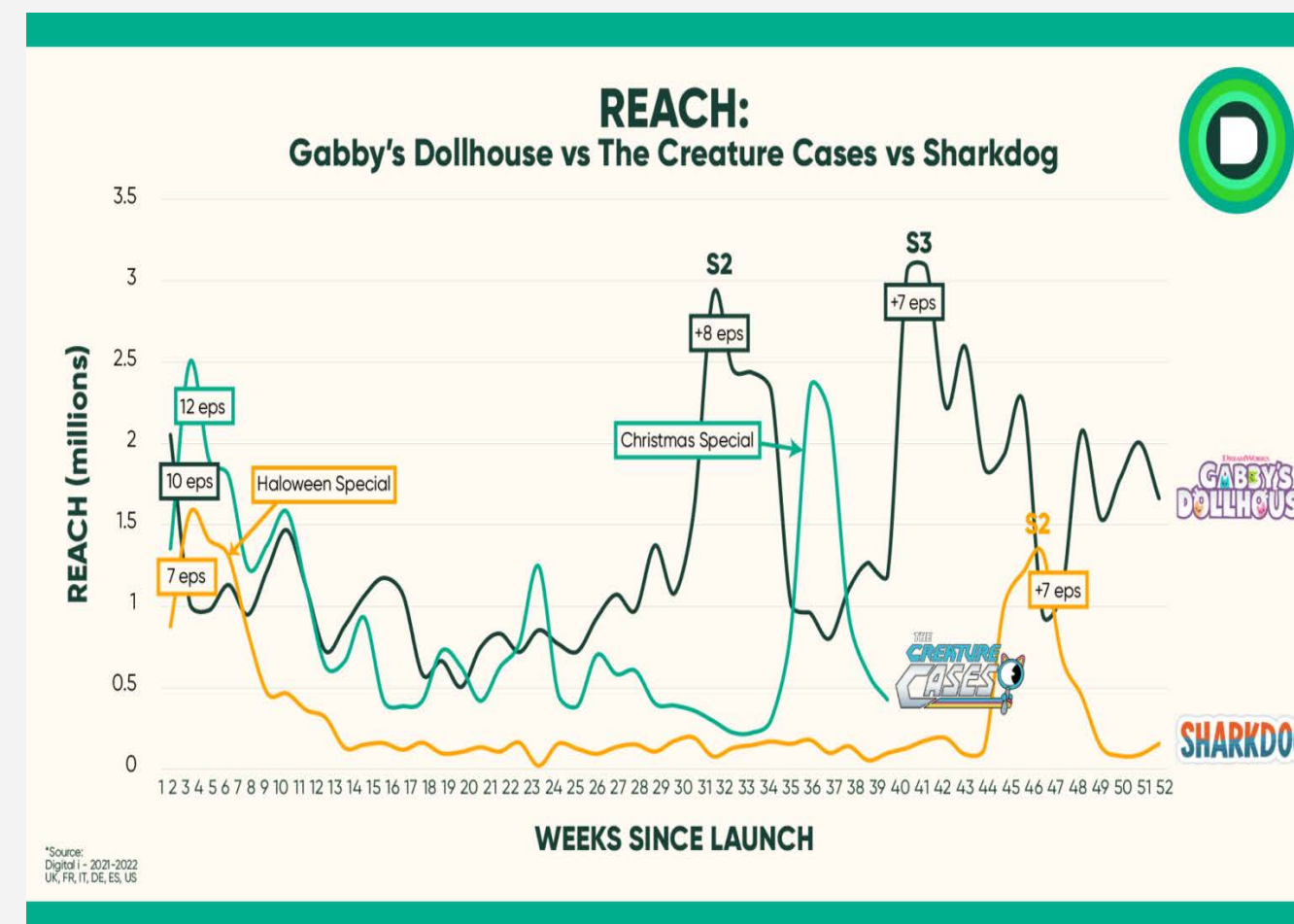
Get In Touch

If you're interested in understanding more about our SoDA platform and SVOD data can benefit you, get in touch.

Know your audience.

Join the viewing revolution.

Enjoy the article in Digital i's blog [here](#).



Digital i's SVOD Measurement System SoDA



GERMANY 100 MOVIES | OVERVIEW

TOTAL STREAMS BY MOVIE NETFLIX - AMAZON

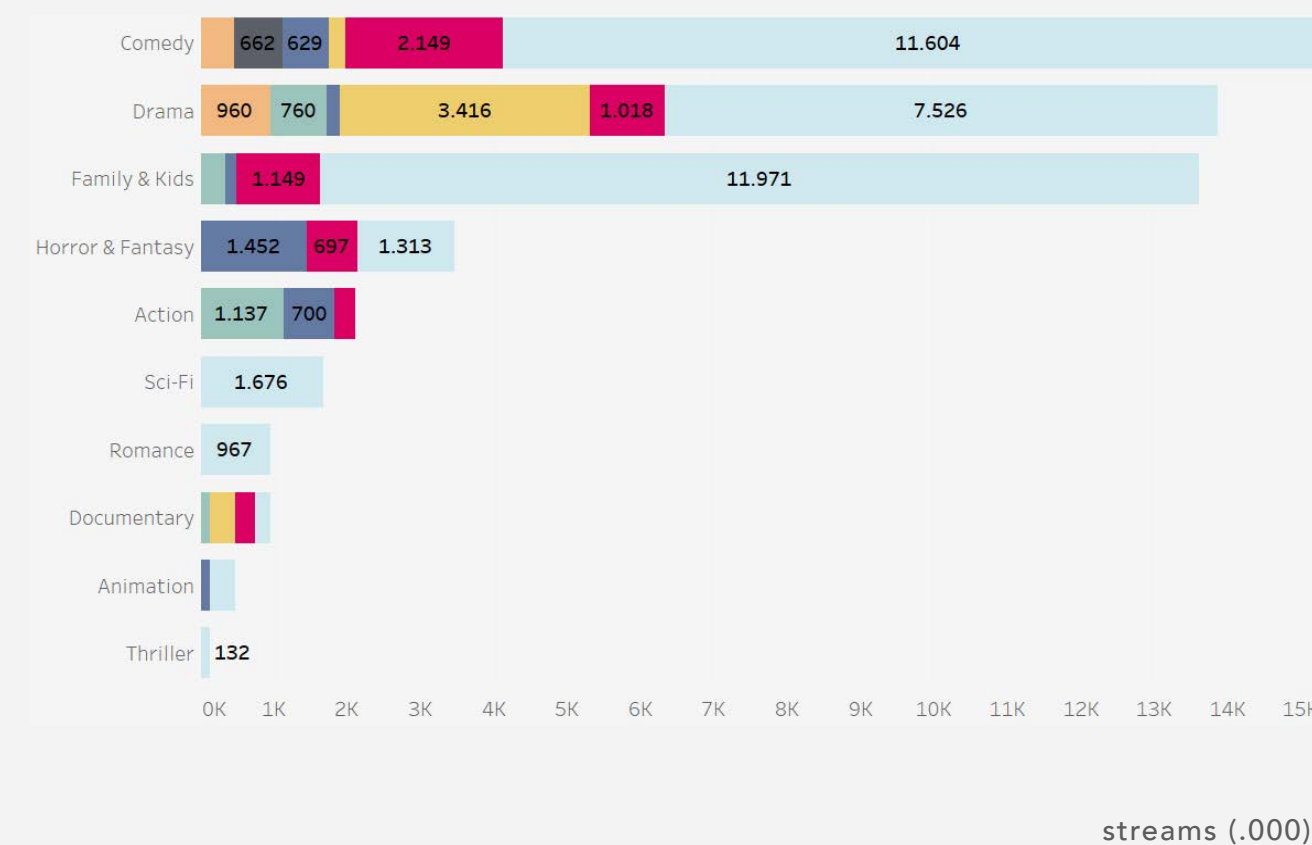
	MOVIES	PLATFORM	GENRE	STREAMS
1	Murder Mystery 2	Netflix	Comedy	4.949
2	Murder Mystery	Netflix	Comedy	2.777
3	Chupa	Netflix	Family & Kids	2.572
4	Paw Patrol: The Movie	Netflix	Family & Kids	2.350
5	The Last Kingdom: Seven ...	Netflix	Drama	2.318
6	Old	Amazon	Family & Kids	1.342
7	Fenómenas	Netflix	Horror & Fantasy	1.172
8	Kill Bok-soon	Netflix	Action	1.137
9	Honest Thief	Netflix	Drama	1.057
10	The 5th Wave	Netflix	Sci-Fi	1.036
11	Takeover	Netflix	Comedy	996
12	A Tourist's Guide to Love	Netflix	Romance	967
13	Dune	Amazon	Family & Kids	820
14	The Accountant	Netflix	Drama	788
15	Luther: The Fallen Sun	Netflix	Drama	767
16	Hunger	Netflix	Drama	760
17	Escape Room	Netflix	Drama	715
18	AKA	Netflix	Action	700
19	Pelican Blood	Netflix	Horror & Fantasy	697
20	Fuga de Reinas	Netflix	Comedy	662
21	Exists	Netflix	Horror & Fantasy	641
22	Manta, Manta	Netflix	Comedy	608
23	Birds of Prey	Netflix	Comedy	593
24	Peter Rabbit	Netflix	Family & Kids	582
25	Bibi Blocksberg and the S...	Netflix	Family & Kids	560
26	Mighty Morphin Power Ra...	Netflix	Family & Kids	559
27	Alvin and the Chipmunks: ...	Netflix	Family & Kids	554
28	American Pie	Netflix	Comedy	539
29	Think Like a Man	Netflix	Comedy	503
30	Snake Eyes: G.I. Joe Origins	Amazon	Drama	492
31	The Land Before Time	Netflix	Family & Kids	490
32	Nuh Boguldu	Netflix	Drama	482
33	Priest	Netflix	Horror & Fantasy	477
34	All Quiet on the Western F...	Netflix	Drama	476
35	Ah Belinda	Netflix	Comedy	470
36	Grown Ups	Netflix	Comedy	453
	The Green Knight	Netflix	Drama	445

SHOWING 36/100 - [See complete chart here](#)

CATALOG SHARE BY COUNTRY NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES NETFLIX - AMAZON



streams (.000)

PRODUCTION COUNTRIES: Usa & Canada Europe Germany Asia UK Latam Other

AMERICAN CONTENT MADE THE COMPETITORS BITE THE BULLET WITH A LEAP OF ±16 POINTS

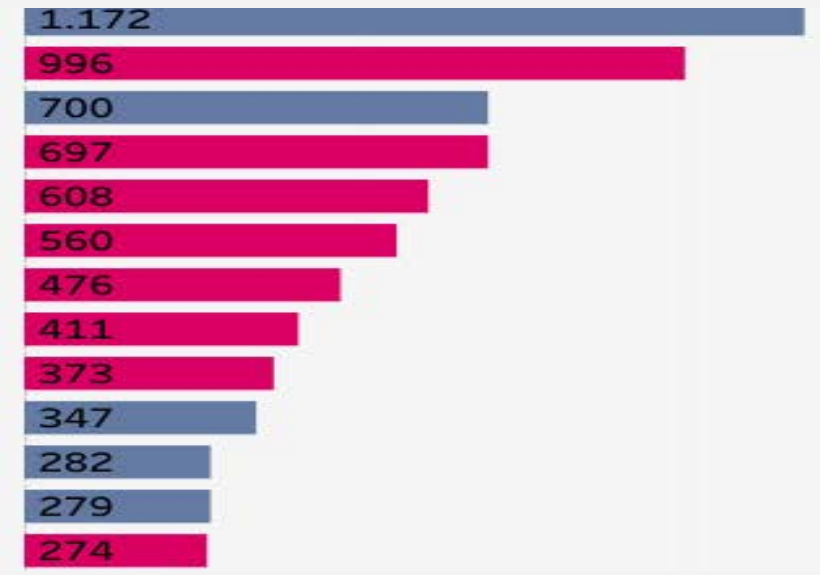
The entire Top 5 is composed of English-speaking movies led by Netflix Original Comedy "Murder Mystery". These movies tend to be consumed in couples and gather over 8M streams. Asian content doubled in size with "Kill Bok-soon" as the frontrunner with 1.1M streams. The German top grid is showing off more diversity than what we are used to seeing with British and European content within Top30. This reflects mainly on Comedy and Drama, in which the latter has crashed and burned 25 points compared to the previous month. Comedy jumps up to the best spots with "Murder Mystery", local "Takeover", "Fuga de Reinas", "Manta, Manta" and other 16 titles in the Top 100.

Family & Kids quota increased by 7 points boosted by the viewership of "Chupa" with 2.5M streams. European content in the Horror & Fantasy genre outperformed US content, as the Spanish paranormal movie "Fenómenas" surpassed 1 million views.

GERMANY 100 MOVIES | EUROPEAN FOCUS

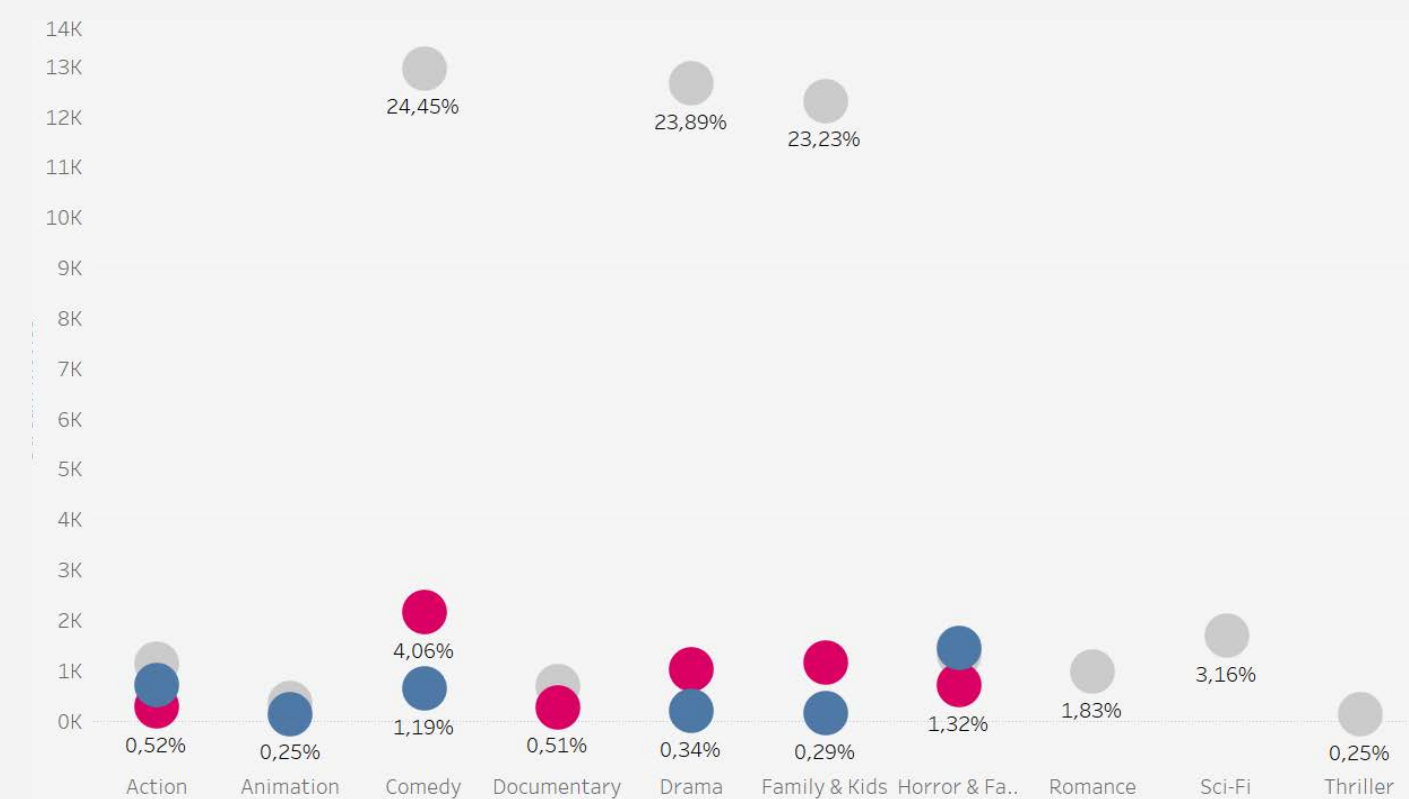
LOCAL AND EUROPEAN SHOWS IN THE TOP 100 NETFLIX - AMAZON

MOVIES	PLATFORM	POSITION	GENRE
1 Fenómenas	Netflix	ES 6	Horror & Fantasy
2 Takeover	Netflix	DE 10	Comedy
3 AKA	Netflix	FR 16	Action
4 Pelican Blood	Netflix	DE 17	Horror & Fantasy
5 Manta, Manta	Netflix	DE 20	Comedy
6 Bibi Blocksberg and the S...	Netflix	DE 23	Family & Kids
7 All Quiet on the Western F..	Netflix	DE 31	Drama
8 Weißbier im Blut	Netflix	DE 37	Comedy
9 The Girl in the Spider's W..	Netflix	DE 41	Drama
10 One More Time	Netflix	SE 46	Comedy
11 Serial (Bad) Weddings 3	Amazon	FR 10	Comedy
12 Hatching	Amazon	FI 11	Horror & Fantasy
13 The Hunter's Prayer	Amazon	DE 12	Action



SHOWING 13/23 - See complete chart here

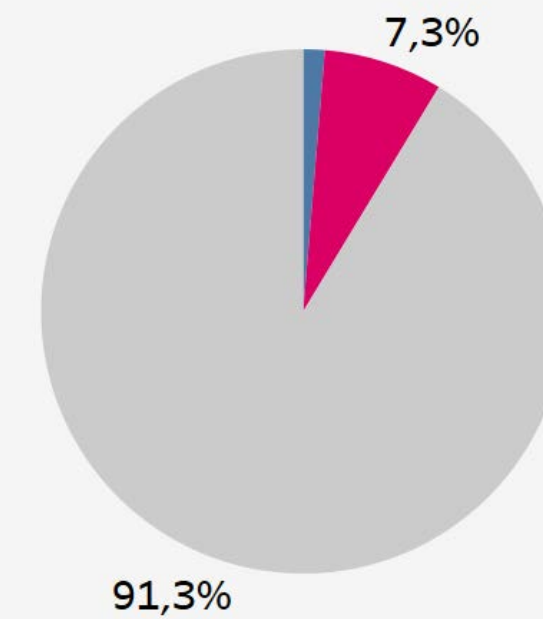
CONTRIBUTION OF LOCAL & EUROPEAN SHOWS TO TOTAL STREAMS NETFLIX - AMAZON



NUMBER OF TITLES BY GENRES NETFLIX - AMAZON

GENRE	EU	DE
Action	1	1
Animation	1	
Comedy	2	4
Documentary		2
Drama	1	3
Family & Kids	1	4
Horror & Fanta..	2	1

CONTRIBUTION TO DRAMA STREAMS



PRODUCTION COUNTRIES:



GERMAN LOCAL FILMS HOLD THE SECOND-BEST RATE IN THE GENERAL TOP 100

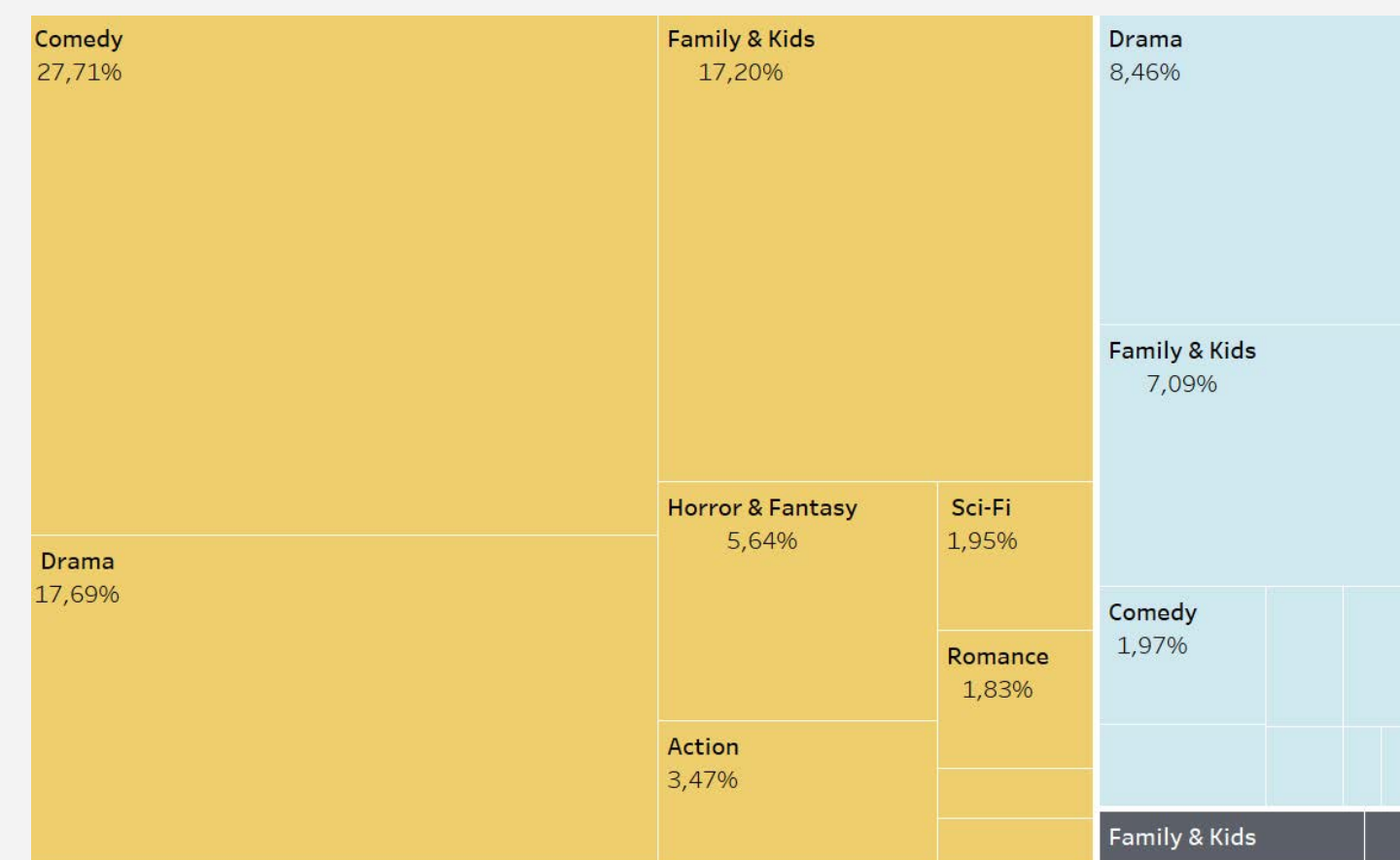
Comedy productions made in Germany account for up to 4% of the content available for streaming, with 2 million views. These films often incorporate humour, satire, and cultural references specific to German society, and some have even made it to Netflix's Top 25 list, such as "Take Over" and "Manta, Manta", although they did not reach the 1 million view mark. The only European title to achieve this feat is the Spanish movie "Fenómenas". In the horror genre, the local production "Pelican Blood", which is currently ranked #17 on Netflix with 697K views. "All Quiet on the Western Front" keeps the tracks up with 476K streams after more than six months showing off one of the best shelf lives a European film has had on the N Platform.

GERMAN AND EUROPEAN PRODUCTIONS ARE PRESENT IN ALMOST EVERY GENRE

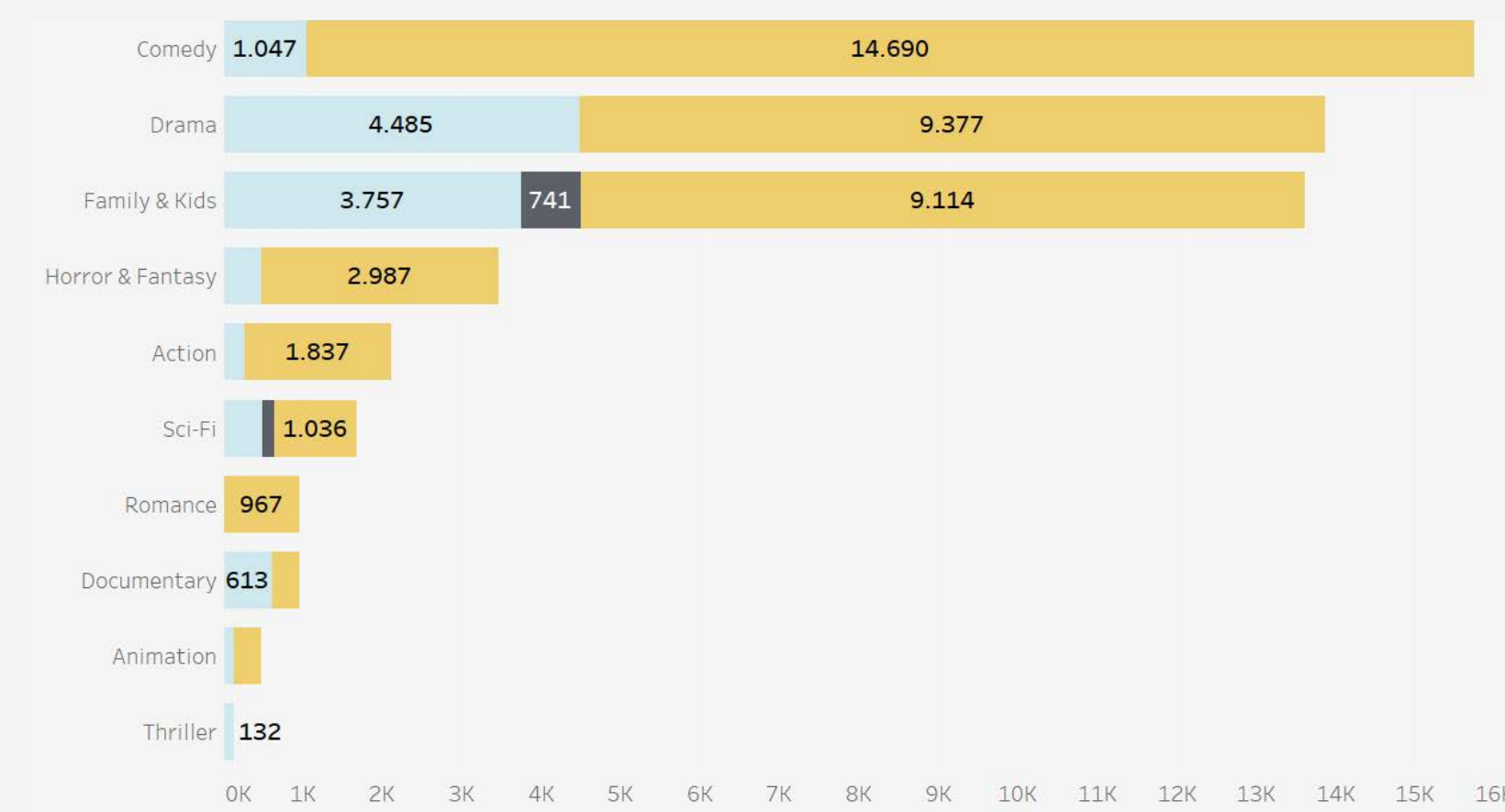
Amazon Prime Video features more European titles on their top list compared to Netflix. Two comedies, "Serial (Bad) Wedding 3" and "Hatching," are at the top of the list. The original comedy "Serial (bad) Wedding" also appears on the list, indicating that old movies can receive a boost in viewership from new releases. However, the average number of streams on Amazon is lower than on Netflix. No European titles from Disney+ made it onto the chart.

GERMANY 100 MOVIES | SVOD PLATFORMS

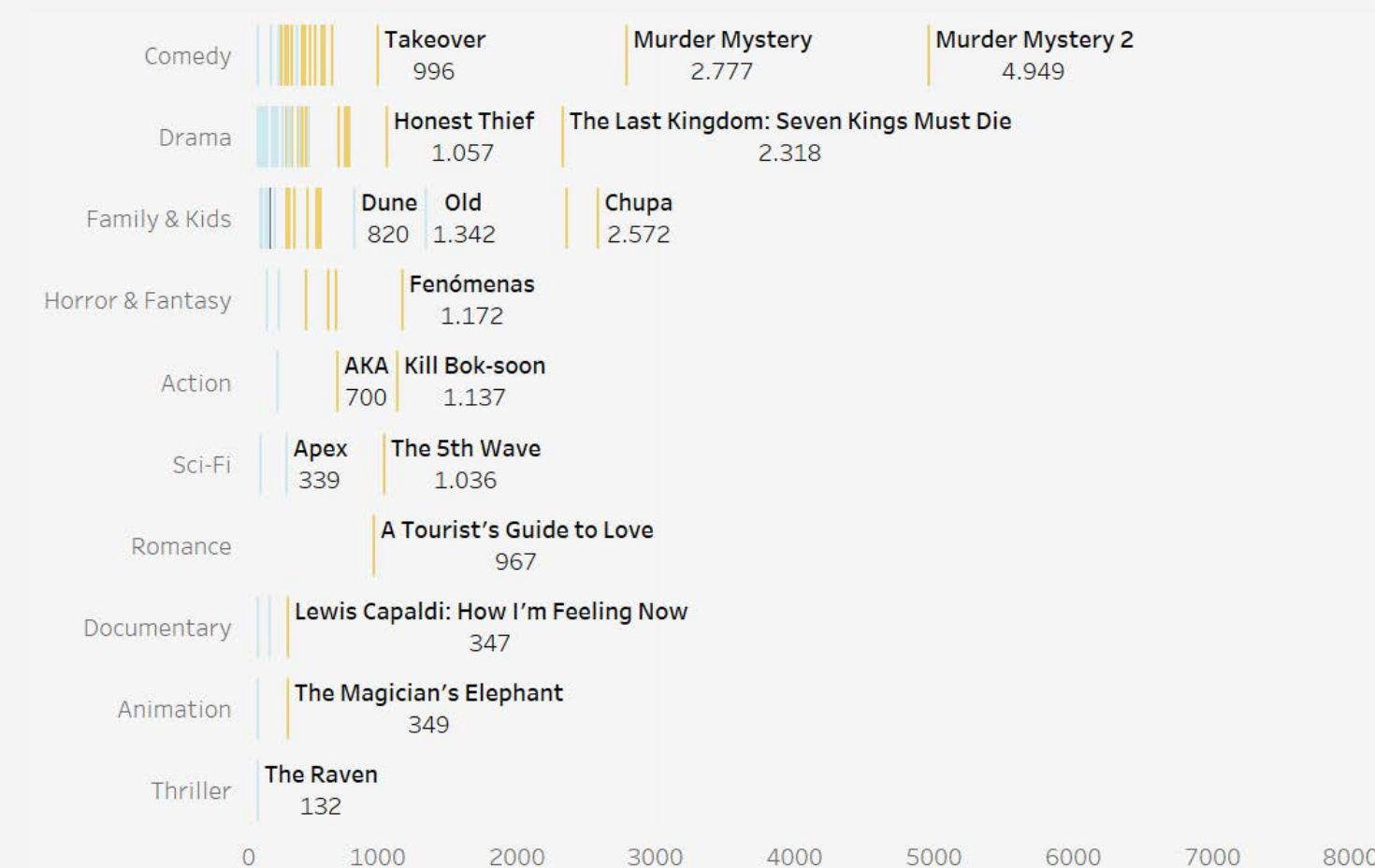
MOST WATCHED GENRES SHARE BY PLATFORM



TOTAL STREAMS BY GENRES PLATFORM COMPARATIVE



TOP MOVIES STREAMS BY GENRES



OTT: Amazon Netflix Disney+

DISNEY+ PRESENTS THE LOWEST SHARE OF THE 5 MARKETS UNDER 2%

Netflix remains in the dominant position with a market share of 77%, which has increased by 2 points compared to the previous report in March. On the other hand, Amazon's market share has decreased by almost 3 points, now standing at 21,5%. Disney+, as a newcomer in our data, has entered the market with a share below 2%, coming greatly from Family & Kids' (741K streams) and a minority of Sci-Fi attached to long-awaited "Avatar" under the 150K streams. We will have to wait and see if Disney has the elements to make a significant impact in the German market as it does in other countries.

Comedy made the first spot with 15.7M streams, however only two flicks sit above the 1M streams maximum bar. Prime Video feeds the Drama section collecting 8% of Top100 share. On its side, Netflix's movies head the list with "The Last Kingdom" and "Honest Thief" ranked as second-best, nailing the 1M streams.

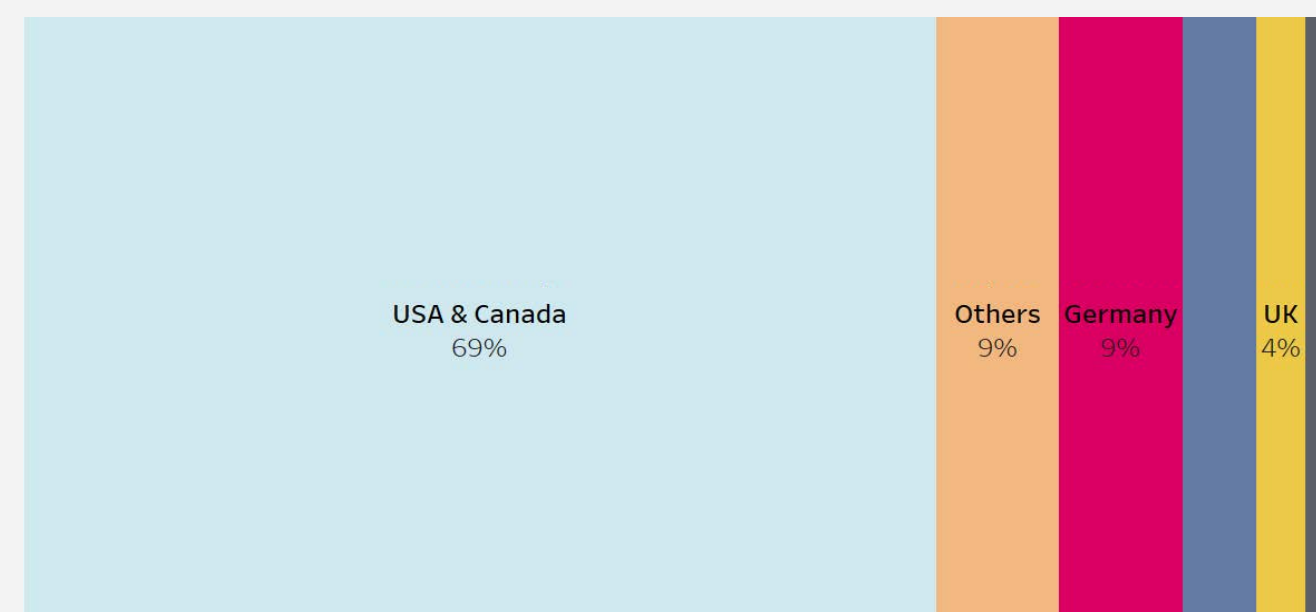
GERMANY 100 SHOWS | OVERVIEW

TOTAL STREAMS BY SHOW NETFLIX - AMAZON

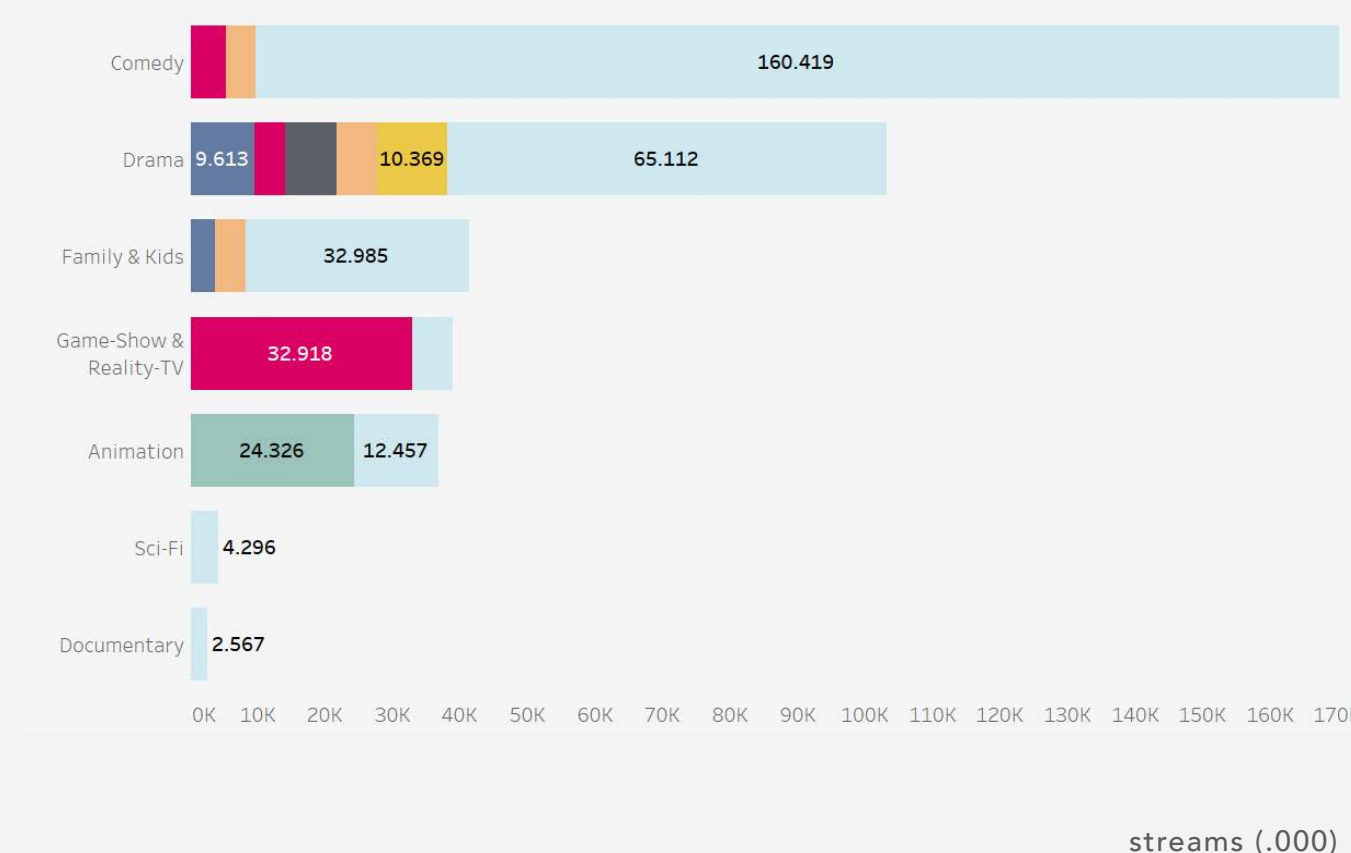
	SHOWS	PLATFORM	GENRE	STREAMS
1	The Big Bang Theory	Netflix	Comedy	55.515
2	The Rookie	Netflix	Comedy	46.644
		Disney+	Comedy	6.610
3	The Night Agent	Netflix	Drama	30.820
4	LOL: Last One Laughing G..	Amazon	Game-Show & Reality-TV	29.462
5	Naruto: Shippūden	Netflix	Animation	24.326
6	PAW Patrol	Netflix	Family & Kids	11.717
7	Brooklyn Nine-Nine	Netflix	Comedy	11.143
8	Beef	Netflix	Comedy	10.796
9	Shadow and Bone	Netflix	Family & Kids	8.845
10	Family Guy	Disney+	Animation	8.466
11	The Marked Heart	Netflix	Drama	7.620
12	Star Trek: Picard	Amazon	Comedy	7.442
13	Love Is Blind	Netflix	Game-Show & Reality-TV	6.055
14	Bienvenidos a Edén	Netflix	Drama	5.651
15	Superstore	Netflix	Comedy	5.543
16	The Diplomat	Netflix	Drama	5.447
17	Two and a Half Men	Amazon	Comedy	5.383
18	The Good Wife	Amazon	Drama	5.238
19	Obsession	Netflix	Drama	4.922
20	Grey's Anatomy	Disney+	Drama	4.800
21	Florida Man	Netflix	Drama	4.759
22	You	Netflix	Drama	4.519
23	Transatlantic	Netflix	Drama	4.497
24	Wellmania	Netflix	Comedy	4.395
25	The Mandalorian	Disney+	Sci-Fi	4.296
26	Turkish for Beginners	Netflix	Comedy	4.112
27	Public Enemy	Netflix	Drama	3.962
28	Miraculous: Tales of Lady..	Netflix	Family & Kids	3.722

SHOWING 28/54 - [See complete chart here](#)

CATALOG SHARE BY COUNTRY NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES NETFLIX - AMAZON



PRODUCTION COUNTRIES: Usa & Canada Europe Germany Asia UK Latam Other

COMEDY KEEPS ITS RISING JOURNEY TO THE SKY

The most popular genre leaped 8 points, totalling 175M streams, thanks to all-time favourite "The Big Bang Theory" and police procedural crime drama television series "The Rookie" as head of the Top100 list. Far from those scores, but still relevant, we find the collaboration between A24 and Netflix, a new dramedy "Beef" starring Steven Yeun and Ali Wong and collected 10.7M streams.

Drama bolstered its positions by around 25% share while Family and Kids fell deeply this month by almost 10 points and met Game-Show & Reality-TV quota.

LOCAL PRODUCTIONS REACHED 11% SHARE, WHILE ASIAN AND OTHER COUNTRIES ALSO ROSE

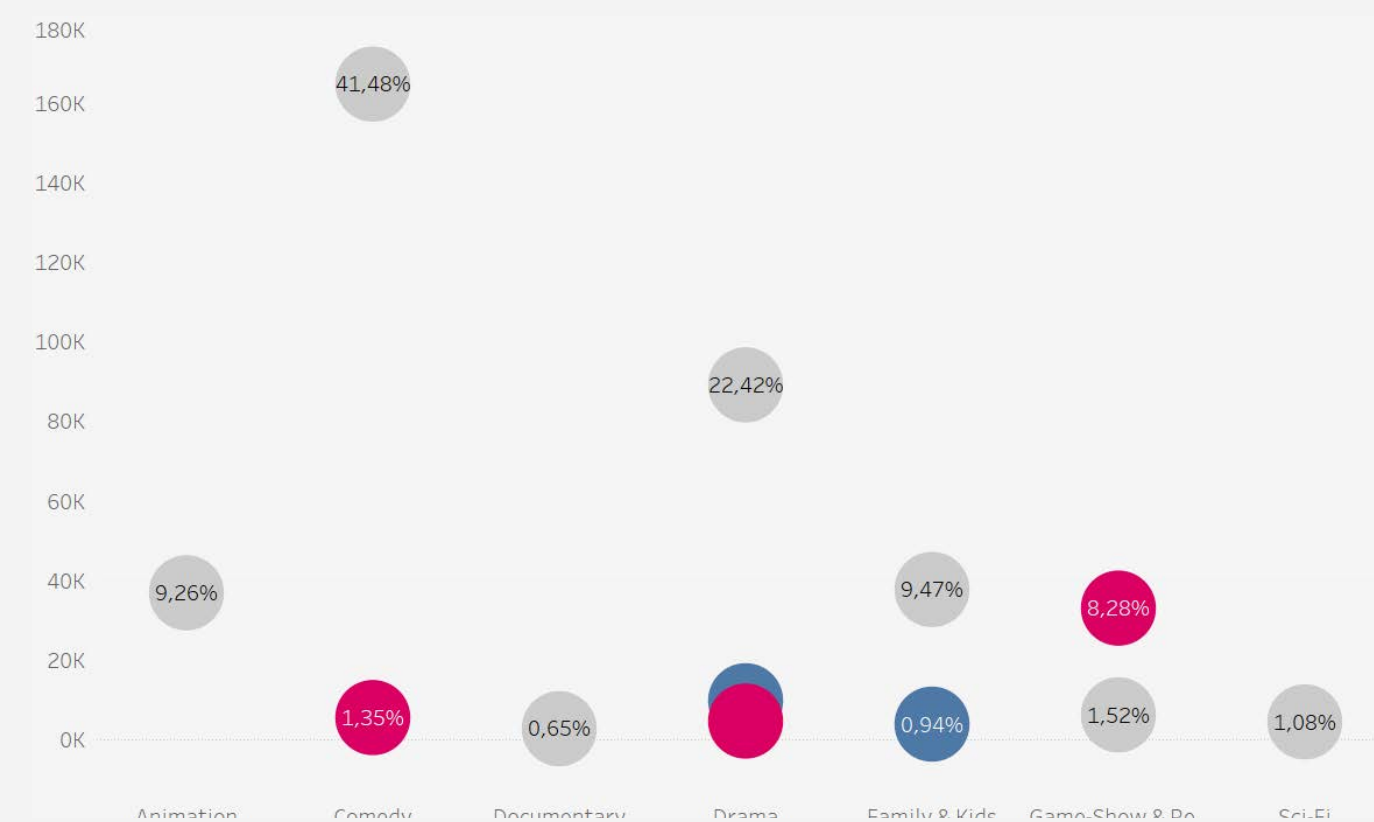
German versions of "LoL" and Japanese Anime "Naruto: Shippūden" close the Top5 with 24.3M streams. Colombian thriller-drama "The Marked Heart" and Spanish "Bienvenidos al Edén" collected 7.6 and 5.6M streams each within the Top14; all together, these titles bring some diversity at the head of the Top100's list. These last Spanish-Speaking titles were also relevant in other European territories. However, British productions know how to deliver Drama-Thrillers that keep the audience hanging for the next episode, "The Diplomat" (5.4M) and "Obsession" (4.9M) are good proof of its TV industry muscle.

GERMANY 100 SHOWS | EUROPEAN FOCUS

LOCAL AND EUROPEAN SHOWS IN THE TOP 100 NETFLIX - AMAZON

SHOWS	PLATFORM	POSITION	GENRE	STREAMS
1 LOL: Last One Laughing Germany	4 Amazon DE	1	Game-Show & Reality-TV	21.034
	3 Amazon DE	5	Game-Show & Reality-TV	2.700
	2 Amazon DE	3	Game-Show & Reality-TV	3.024
	1 Amazon DE	4	Game-Show & Reality-TV	2.704
2 Bienvenidos a Edén	2 Netflix ES	12	Drama	5.651
3 Transatlantic	1 Netflix DE	24	Drama	4.497
4 Turkish for Beginners	2 Netflix DE	28	Comedy	4.112
5 Public Enemy	1 Netflix BE	31	Drama	3.962
6 Miraculous: Tales of Lady..	1 Netflix FR	32	Family & Kids	3.722
7 Too Hot to Handle Germa..	1 Netflix DE	36	Game-Show & Reality-TV	3.456
8 HILLarious	1 Amazon DE	21	Comedy	1.260

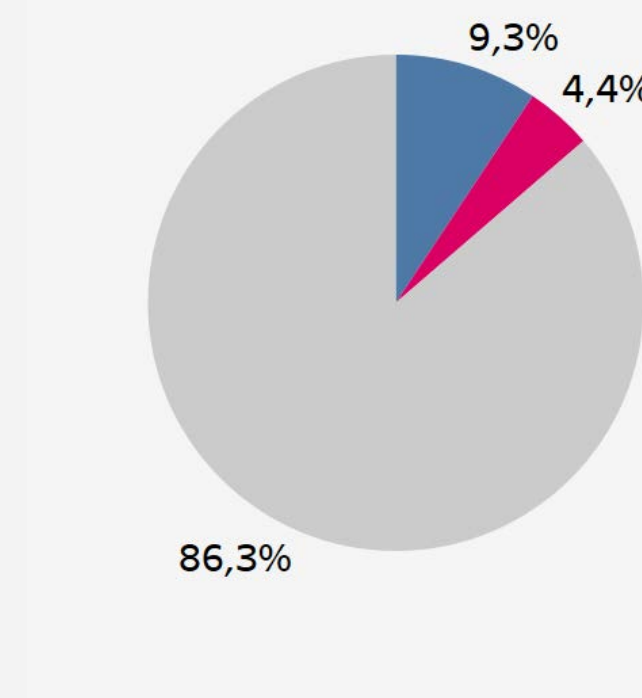
CONTRIBUTION OF LOCAL & EUROPEAN SHOWS TO TOTAL STREAMS NETFLIX - AMAZON



NUMBER OF TITLES BY GENRES NETFLIX - AMAZON

GENRE	EU	DE
Comedy		2
Drama	2	1
Family & Kids	1	
Game-Show & Reality-TV		2

CONTRIBUTION TO DRAMA STREAMS



PRODUCTION COUNTRIES: Europe Germany Others

GERMAN "LOL: LAST ONE LAUGHING" RULED THE CHART WITH 29M STREAMS

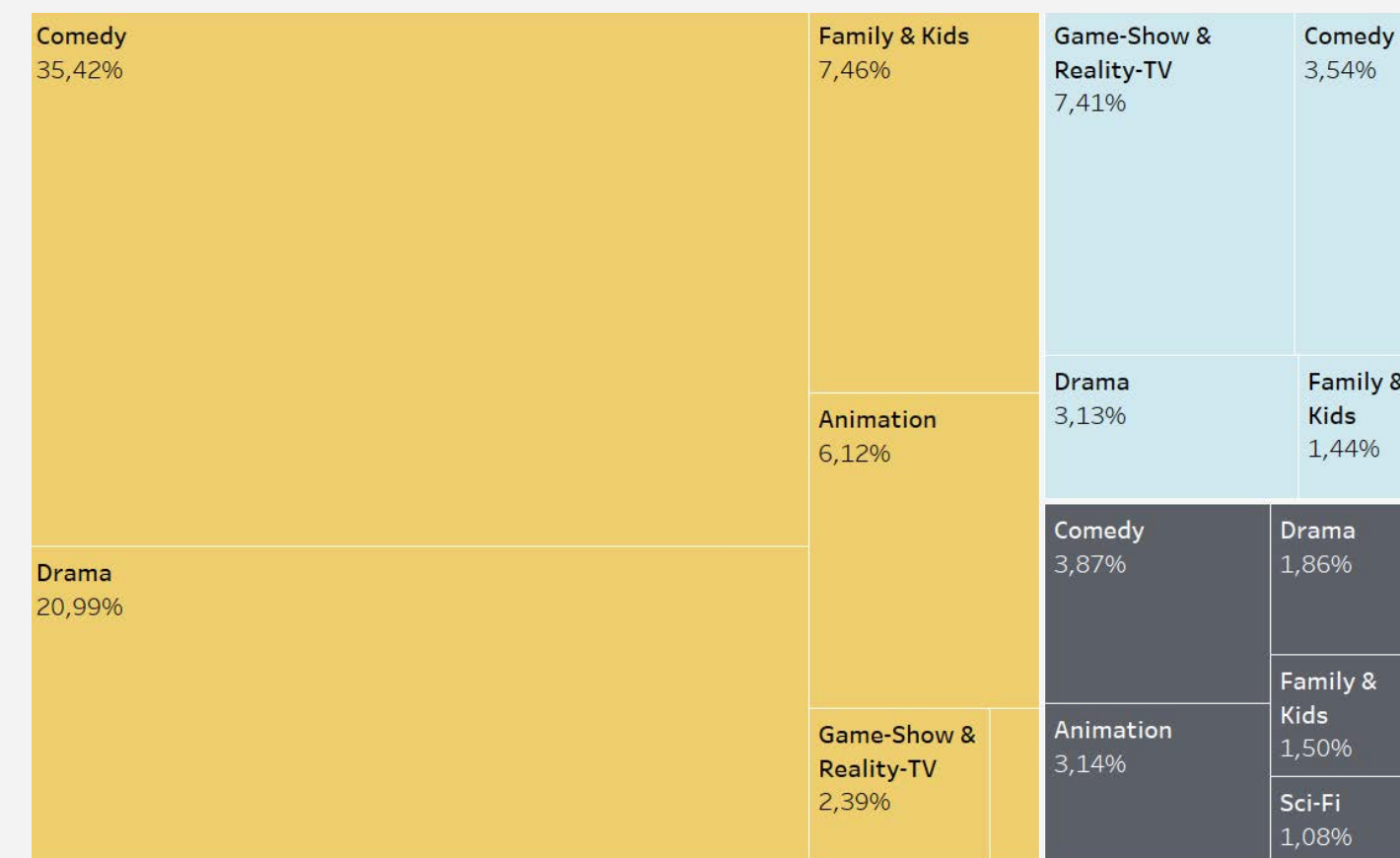
Prime Video's LOL franchise is paying off by driving high, real and steady viewership. Its last season welcomed newcomers who are registering views in the previous instalments. The program represents 8% share in the Top100. Netflix Original "Transatlantic" sits at 24 positions of the leading platform with 4.4M streams. From the creators of "Unorthodox", the fiction is set in the early days of World War II, depicting the European Rescue Committee who worked to get Jewish refugees safely out of Europe.

ONLY TWO EUROPEAN SHOWS ENTERED THE TOP 100

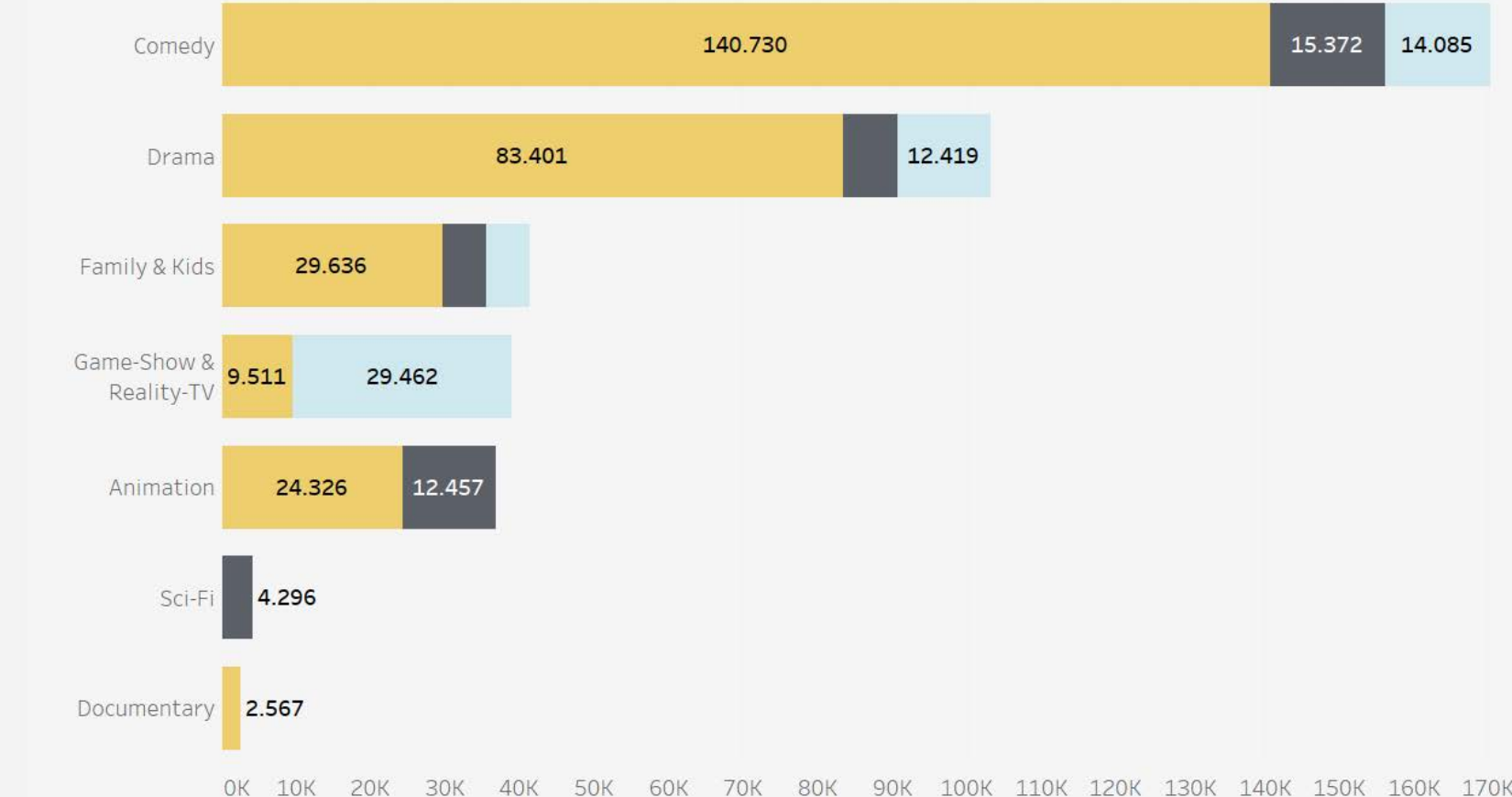
The Spanish drama "Bienvenidos al Edén" has garnered an impressive score of 5.6M streams. Additionally, the French-language Belgian Crime Thriller "Public Enemy", loosely based on the notorious Marc Dutroux case, previously aired on La Une channel in Belgium. This politician series dragged 3.9M streams.

GERMANY 100 SHOWS | SVOD PLATFORMS

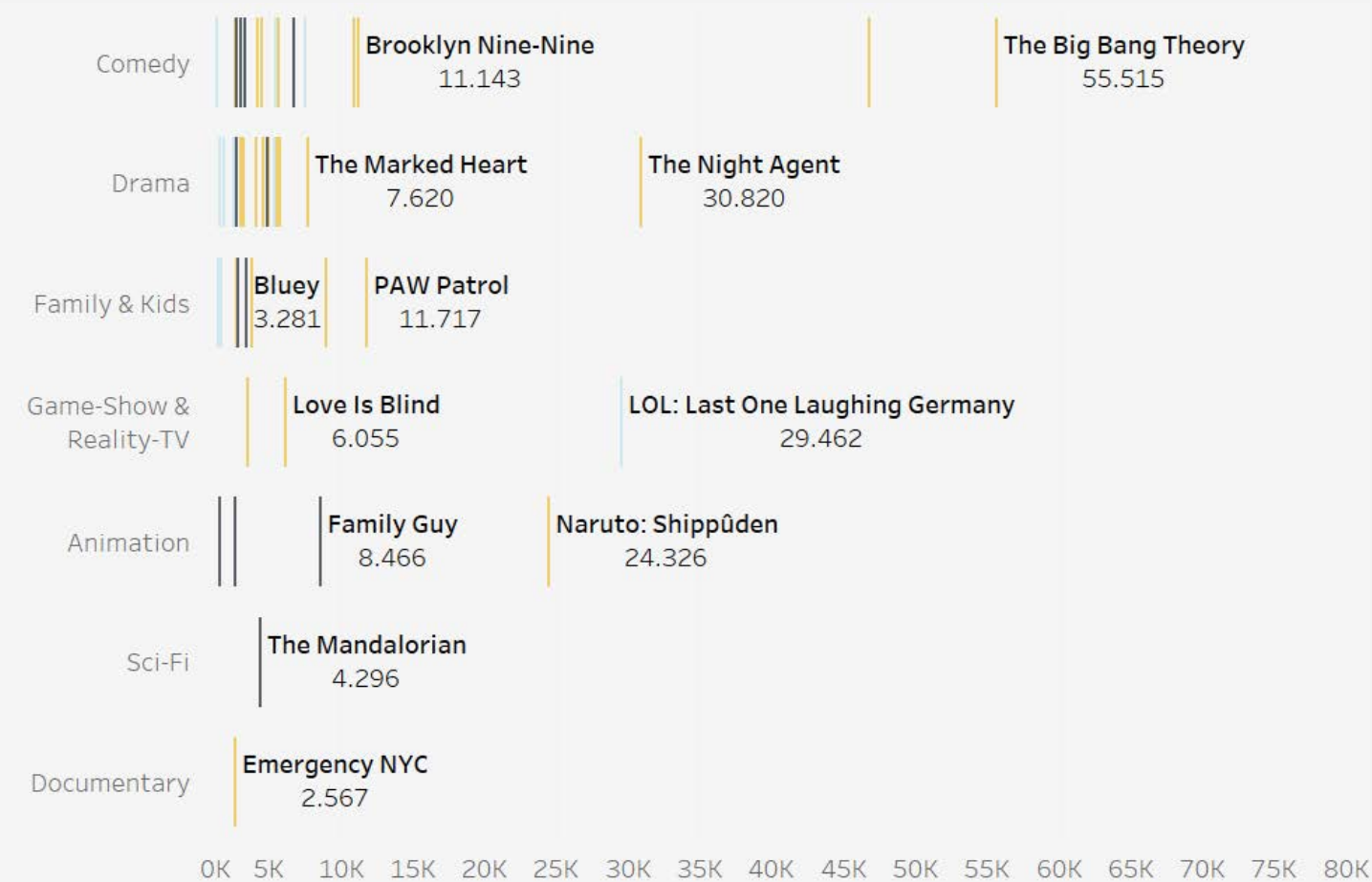
MOST WATCHED GENRES SHARE BY PLATFORM



TOTAL STREAMS BY GENRES PLATFORM COMPARATIVE



TOP SHOWS STREAMS BY GENRES



OTT: Amazon Netflix Disney+

DISNEY+ STEALS PRIME VIDEO TOP 100 QUOTA

The entertainment company established positions with 45M streams, translating to a cut down of almost 10 points in Prime Video viewership, while Netflix maintains around 73%. Unlike Movies, German audiences love Disney+ series. Also contrary to other territories, Disney+ takes the German audience over with its most favourite genre: Comedy, and not so much with Family & Kids content. "The Rookie", "Grey's Anatomy" and "Modern Family" are in the list. 5% share to 20M streams, which surpassed Prime Video's contribution to the genre. Together with the UK, Germany is the other market which keeps Warner "The Big Bang Theory" at the Top. The show's unique brand of the all-times nerdy comedy proves constantly to be massively appealing to fans all over the world. Drama on Netflix sits at t

NETFLIX HAS FOUND A COMPETITOR WITH DISNEY

The mega-company is rocking the boat on Animation, Sci-fi and Family & Kids to earn its stripes with an 11% quota. However, it is still miles away from the Netflix leading spot. Netflix's series head in all the genres but Game-Show & Reality-TV and Sci-Fi.

HOT CONTENT IN GERMANY

THE BIG BANG THEORY IS THE GOLDEN EXAMPLE OF THE HBOMAX LICENSING CONTROVERSIAL STRATEGY.

CELIA FUMANAL
INNOVATION DIRECTOR



What is HBOMax's new branding strategy? It is no secret that various experts are calling on the new executive head to stop letting valuable IP content slip into the hands of others, including the unbeatable Netflix, which secures millions of subscribers to valuable library content like "The Big Bang Theory". Why spending millions in getting HBOMAX subscribers to then give long-lasting shows to the competition?

Recently, HBO Max positioned itself as the go-to destination for movie lovers and has established itself as a premium platform for adult viewers. Today, the possibility of WBD loaning out titles on its ever-rival Netflix is an open discussion. It points out how much the direct-to-consumer game has changed in such a short amount of time, and how this scenario was unthinkable a year ago. The streaming wars used to be defined by high walls, but now it seems like the legacy media players are doing whatever it takes to make their services profitable, including renewing content licensing. According to Parrot Analytics, HBO Max movie demand surpassed Netflix in July 2022 with a 20% quota in the US. Without effort, we can name some highly anticipated releases from last year that have the WBD label on it like "The Batman", "Zack Snyder's Justice League", "Elvis", "Joker", and "Dune" available on the platform. It's interesting to see how their unique position in the market

has allowed them to cater to arthouse lovers and mega-blockbusters fans.

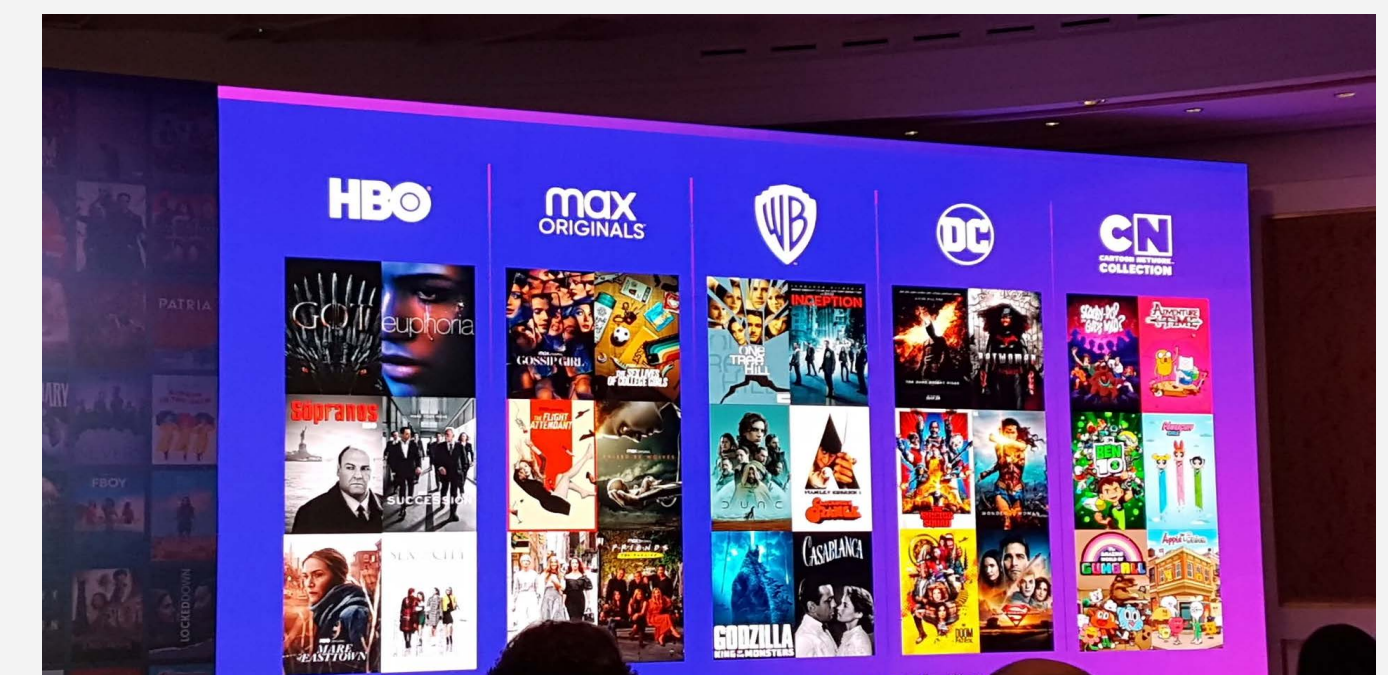
If we look at the most streamed series in Germany, "The Big Bang Theory" and "Two and a Half Men" are Warner Bros. (WBD) properties. They have respectively reached impressive amounts of 974 million and 285 million views in the German market.

Squeeze the content portfolio with cross-content viewership

The worth of a media company is determined by the depth of its catalogue and the connections between its products. Some content companies focus on expanding their portfolio to attract new subscribers, constantly providing fresh content. However, profitability has shown that a product's success relies on the demand it generates within the platform. Many streaming platforms struggle to retain long-term loyal viewers and promote re-watching. Netflix, on the other hand, understands this equation. According to [Variety](#), licensed shows like "NCIS", "Grey's Anatomy", and "Criminal Minds" have high re-watch value on Netflix, competing with original shows like "Stranger Things" and "Ozark". As of December 2022, 47% of Netflix's catalogue was licensed.

Despite concerns last year about Netflix losing ground in the market, the company is poised to remain one of the leading entertainment services. We have learned that not many companies can provide entertainment on a global scale. The main question is where Netflix is headed. There has been discussion that Netflix will become the primary repository for traditional studios' content in the future as those companies move away from the streaming model. With its audience and global reach, Netflix is well-positioned to support the cashflow required to keep producing and exporting content that studios need.

The real question is how deep Netflix's pockets are to provide licensing and original content in a hybrid model.



GLOBAL TAKES

- 1 / Growth of Family & Kids' movie and Animation shows.** On the movie side, the Family & Kids category has boosted its share by 8 points, accounting for 18% of total streams in all five markets. In the TV show market, Animation has gained 6 points, reaching 8.5%. This increase can be attributed largely to the inclusion of Disney in our reports, thanks to its timeless and extensive catalogue. Some of the most streamed movies include "Coco", "Moana" and "Tangled" while the popular shows include "The Simpsons", "Family Guy" and "Spidey and His Amazing Friends".
- 2 / Disney+ makes a triumphant entry into the charts.** Reaching its peak in Italy and its lowest point in Germany, Disney+ has made a significant debut on the Think Data charts, having an immediate and transformative impact on our streaming landscape data. In the TV show market, it accounts for almost a quarter of all show streams across all markets. Some of the most popular shows include "Modern Family", "The Rookie", and "Bluey". However, the service does not feature many European titles, with only two British ones being offered: "Prison Break" and "Peppa Pig".
- 3 / The "Other" category experienced a significant boost.** With a 5-point increase in its share, this month the non-European and non-American category expanded its stream offerings with the addition of two Australian titles and one Turkish title: "Wellmania," "Bluey," and "Whom Were We Running From?". These shows, among others, garnered a total of 128 million views in the TV show market, marking the category's second-highest share.
- 4 / Italian movies broke another record.** With 26.5 of share and 11.8M of streams, local movies break the record January 2022 set, back when "Come un Gatto in Tangeziale" and "The Hand of God" premiered. The top positions on the charts are occupied by acquired movies, such as "Belli Ciao", a remake of Spanish film "Sentimental" "Vicini di casa" , "Con Tutto il Cuore" and "Una Notte da Dottore", following the trend we observed last month regarding licensed titles.
- 5 / The rise of documentaries.** According to our data, since 2022, the growth of documentaries in the movie market has an average growth ratio of 0.5, which means that, on average, there is one new documentary in the Top #100 every two months. The rise of documentaries on streaming platforms can be attributed to factors like cost-effectiveness, audience demand, accessibility, and cultural impact. Streaming services prioritize unscripted content due to rising production costs. If you want to know more deeply what's captivating audiences across Europe and beyond about documentaries, go and check Spain's Hot Title.
- 6 / Asian cultural impact is here to stay.** In less than three years, Asian content has gained a strong foothold in European markets, propelled by the popularity of K-Culture: the Korean aesthetic, K-beauty, and K-pop have all contributed to the surge in Asian influence. Asian movies capture about 5% of the market share, while shows secure around 8.3%. France, Italy, and Spain show greater interest in Asian culture compared to the UK and Germany. If you want to know a little bit more about what's going on with K-Trend, go ahead and check Italy's Hot Title.
- 7 / Netflix is exploiting Folklore Horror movies trend to provide glocal content for global reach. Netflix is capturing the rural terror blossom that European productions are heading to as the recent Spanish Goya's awarded "Piggy" and "Veronica" (which also ranked at Netflix top last summer) demonstrate; the tendency has expanded to the so-called Elevated Horror. Arthouse European movies are dominating festivals and showing a viewing force with examples such as Icelandic "Lamb", Welsh "The Feast", and of course Norwegian "Troll" which smashed the streaming records in 2022. Several new releases that turn rural environments and ancient belief systems into subjects for terror, are getting attention and breaking through the noise, proving that Europe has many genre-diverse stories to tell and that Netflix is always ready to use its magic in making them popular.**
- 8 / Licensing content dominates the charts in Germany and the UK.** The studio giant, Disney, is actively formulating a strategy to boost their cash flow through the promotion of Ads-tiers and the licensing of their content to other companies. However, they are not alone in this approach, as Warner Bros. Discovery (WBD) has recently struck a significant deal with Netflix to license HBO content in the US after a decade-long hiatus. Notably, in Europe, Netflix's top shows in Germany and the UK are identified as WBD productions, such as "Big Bang Theory" and "Brooklyn Nine-Nine," maintaining their chart-topping status with over \$1B streams since 2023.

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BRIDGING THE DATA GAP

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