



THINKDATA.

BRIDGING THE DATA GAP

AUGUST 2023

TECTONIC PLATE MOVEMENTS IN THE STREAMING WARS: NETFLIX, AMAZON, AND DISNEY+ COMPETE ON EQUAL GROUND

Parallel trends are impacting the dynamic landscape of the streaming market in August. While a global summer trend leans towards Action films, mainly in English and on Netflix, and crowns them as the month's absolute winners, other significant shifts are occurring. In most markets, we observe a decrease in English-language and local content in favour of European content, especially for the movie market. It's possible that the Glocal nature of European streamers is advancing to a new level in terms of transnational performance. Although Netflix and Amazon carefully curate glocal original content on a country-by-country basis, they also consider common trends in the EMEA region. When these films and series reach the screen, they have the ability to work transnationally, and often even more effectively than before.

Another noticeable trend that has emerged over the past few months is that Netflix is no longer the sole leader in the realm of Glocal content. While the streaming giant plays its cards well with titles like the German "Paradise", the Spanish "Birdbox Barcelona", "Un Cuento Perfecto", the French "Girl(Friend)" and Polish "The Witcher" and "Soul Catcher" both Amazon and Disney+ are also experiencing excellent growth in key markets. Prime Video, for instance, is making waves with drama and teen-oriented shows such as "Culpa Mia" which continues to accumulate views. Disney+ is gaining market share with an eclectic selection that includes Australian kids series "Bluey" and the award-winning "The Bear".

With all these developments, there's bad news for HBO MAX, which still struggles to establish a steady and compelling presence for European

“ ***In most markets, we observe a decrease in English-language and local content in favour of European content, especially for the movie market. It's possible that the Glocal nature of European streamers is advancing to a new level in terms of transnational performance.*** ”

audiences. While a few months ago, the quality-driven platform boasted high market share numbers thanks to flagship shows like "Succession", it's now apparent that surviving in this competitive landscape requires more than standalone titles, even if they're strong. A platform needs to offer content for every member of the household, every month, every week. Netflix has understood this for a long time, Prime Video and Disney+ are catching on, but what about HBO MAX?

Besides, this month, in line with our commitment to making audience data accessible for the independent audiovisual sector, we are presenting the bi-monthly supplement featuring two separate top 30 lists: one for Filmin and another for Movistar. It's important to clarify that this data should not be directly compared with that from global platforms, as we've previously noted. The data from the GECA Barometer allows us to understand the share of a particular series or movie on its respective platform, meaning we can calculate the percentage of users who watched a specific film or show

within a given quarter. Standout shows that have captured the audience's interest and can act as barometers and inspiration for future productions in the independent audiovisual industry include titles like "Montecristo", "Rapa", "Hierro", "Poquita Fe", and "Bosé Renacido".

To finish off, don't miss the Hot Topic of the month which shed light on the entry of AI into the industry. Streaming companies must face a new tech era ahead if they want to survive beyond content. Ad-tiers circulating, FAST-tv competition, AI negotiation about its integration and role, international inflation, disruptive new business models and the rise of venture capital are creating a seismic shift underway in Tinseltown and expanded to the whole industry.

Let's take a closer look at the snapshot of August's data to gain a better understanding of all these shifts.

Enjoy your reading, and trust your data instincts.

Sarah, Celia, Lola, Luis

THE PRESS SAYS 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 provides information about Netflix, Prime Video, Disney+, and HBO Max, and with the new agreement with GECA, it **expands its coverage** in the Spanish market. Specifically, the report will include a Top 30 list for Movistar+ and Filmin platform in the bimonthly supplement.


el medio online de la industria audiovisual

“ Subscribers to the monthly Think Data report, conducted by The Film Agency, will see their service expanded with the inclusion in the bimonthly supplement of a top 30 list for Filmin and Movistar Plus+, based on data from the GECA consultancy’s OTT Barometer. Think Data thus consolidates itself as **an essential source for understanding trends in European and Spanish audiovisual content**.

la fm.

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.



Digital i's SVOD Measurement System SoDA

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

THINK DATA MEETS EL BARÓMETRO GECA



Since 1993, GECA has been at the forefront of the audiovisual industry, consistently committed to adapting to industry changes. In our recent endeavor, GECA created its own Barómetro, a tool that has set out to provide the most precise understanding of OTT audiences. With a focus on renowned as well as more local platforms such as Movistar+ and Filmin, we aim to offer insights that are both intuitive and customizable.

Much like established TV audience measurement systems, our approach at Barómetro OTT is rooted in a sample-based strategy. However, what differentiates us is our 360-degree understanding of user habits, preferences, and consumption patterns, gathered directly from an online survey.

Our methodology encompasses data from an impressive sample of 16,000 individuals annually for the Spanish market, segmented into 2,000 individuals per batch. The data, which is meticulously gathered, respects quotas, ensuring a balanced representation across gender, age, habitat types, and regions.

With Barómetro OTT, users can delve into diverse aspects of OTT consumption: from platform access types, device usage habits, content preferences, to audience rankings. This depth of data not only provides a comprehensive view of the OTT landscape but also offers actionable insights for stakeholders.

PRIME VIDEO SEEKS SUCCESS IN THE WRONG PLACES

The widespread perception is that Amazon's venture into the OTT business is relatively recent and less competitive than Netflix' when, interestingly, Amazon is quite contemporary to the latter. Its budgets, moreover, have little to envy those of the Los Gatos company.

“ **Prime Video has one of the most interesting business models in the market. It is, like the eCommerce platform, a place where you can find practically everything**

Prime Video has one of the most interesting business models in the market. It is, like the eCommerce platform, a place where you can find practically everything. Do you feel like watching a new release movie? You can rent it. Do you want access to the offer of other platforms from a single space? Prime offers you that possibility through its Channels. Do you prefer not to have to pay more, but want access to a good selection of Original Content? The Prime Video subscription, by volume and variety, is solid in its value proposition, and yet, it doesn't give that impression at all.

“ **At a time like the present, when production budgets are under severe scrutiny, the success of medium-sized productions could give Prime Video the goal it has resisted so far**

Since the Think Data project came to light, a constant in all the countries analyzed has been the weak traction of Prime Video's offer among its customer base. The share of viewership has always leaned towards the competition's offer, something surprising considering that Prime Video is following the international expansion manual to the letter. It is one of the platforms that has woven more partnerships with local televisions, and its push for glocal content is also very evident. So why is success so elusive? Prime Video seems determined to seek triumph in the wrong places. It is the platform that occupies the first and second place for the most expensive television productions in history (for "The Rings of Power" and "Citadel", respectively). However, neither one has brought them the recognition they sought with such capital outlays. Think Data's August data marks a notable trend change, opening a window of opportunity for cre-



ELENA NEIRA
LA OTRA PANTALLA,
GUEST ANALYST
OF THE MONTH

ators. The teenage romantic drama, that which has brought so many joys to Netflix, has handed them a popularity on a silver platter that they had not achieved with their blockbuster series. And the same can be said of local comedy or entertainment formats.

At a time like the present, when production budgets are under severe scrutiny, the success of medium-sized productions could give Prime Video the goal it has resisted so far. Amazon holds one of the best market trend compasses and the ability to detect when interest bubbles are forming. It just needs to stop looking at what others are doing with their garden and focus on its own.

SPAIN | 100 MOVIES | OVERVIEW

TOTAL STREAMS BY MOVIE

NETFLIX - AMAZON

Nº	MOVIE	PLATFORM	GENRE	STREAMS
1	Heart of Stone	Netflix	Action	3,979
2	Paradise	Netflix	Sci-Fi	2,075
3	Snafu	Netflix	Action	1,462
4	The Meg	HBO Max	Drama	360
		Netflix	Drama	805
5	The Monkey King	Netflix	Family & Kids	1,146
6	Zom100: Bucket List of the Dead	Netflix	Horror & Fantasy	1,119
7	El hotel de los líos	Amazon	Comedy	1,085
8	Ladybug and Cat Noir: Awakening	Netflix	Family & Kids	1,079
9	Escape Room (L'hora de la veritat)	Netflix	Comedy	1,040
10	Happiness for Beginners	Netflix	Comedy	1,007
11	Venom: Let There Be Carnage	Netflix	Drama	898
12	You Are SO Not Invited to My Bat Mitzvah!	Netflix	Family & Kids	845
13	Marlowe	Amazon	Drama	825
14	Fatum	Amazon	Drama	822
15	Red White & Royal Blue	Amazon	Comedy	799
16	Mavka. The Forest Song	Amazon	Family & Kids	767
17	Squared Love Everlasting	Netflix	Comedy	747
18	Killer Book Club	Netflix	Family & Kids	697
19	Babylon	Amazon	Comedy	614
20	Soulcatcher	Netflix	Action	606
21	What Men Want	Netflix	Comedy	593
22	Perfect Stranger	Netflix	Thriller	552
23	Asedio	Amazon	Thriller	547
24	Beautiful Disaster	Amazon	Comedy	523
25	10 Days of a Bad Man	Netflix	Drama	507
26	Bird Box: Barcelona	Netflix	Horror & Fantasy	501
27	Street Kings	Netflix	Drama	493
28	Poisoned: The Danger in Our Food	Netflix	Documentary	486
29	Dolittle	Netflix	Family & Kids	471
30	Extraction 2	Netflix	Action	412
31	Sing 2	Amazon	Family & Kids	405
32	Nimona	Netflix	Family & Kids	405
33	They Cloned Tyrone	Netflix	Comedy	379
34	Mona Lisa and the Blood Moon	Amazon	Horror & Fantasy	363
35	Culpa mía	Amazon	Drama	351
36	Guardians of the Galaxy Vol. 3	Disney+	Comedy	342
37	A Life Too Short: The Isabella Nardoni Case	Netflix	Documentary	340
38	Dream	Netflix	Comedy	339
39	Sing	Netflix	Family & Kids	325
40	De Caperucita a loba en sólo seis tíos	Amazon	Comedy	320

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

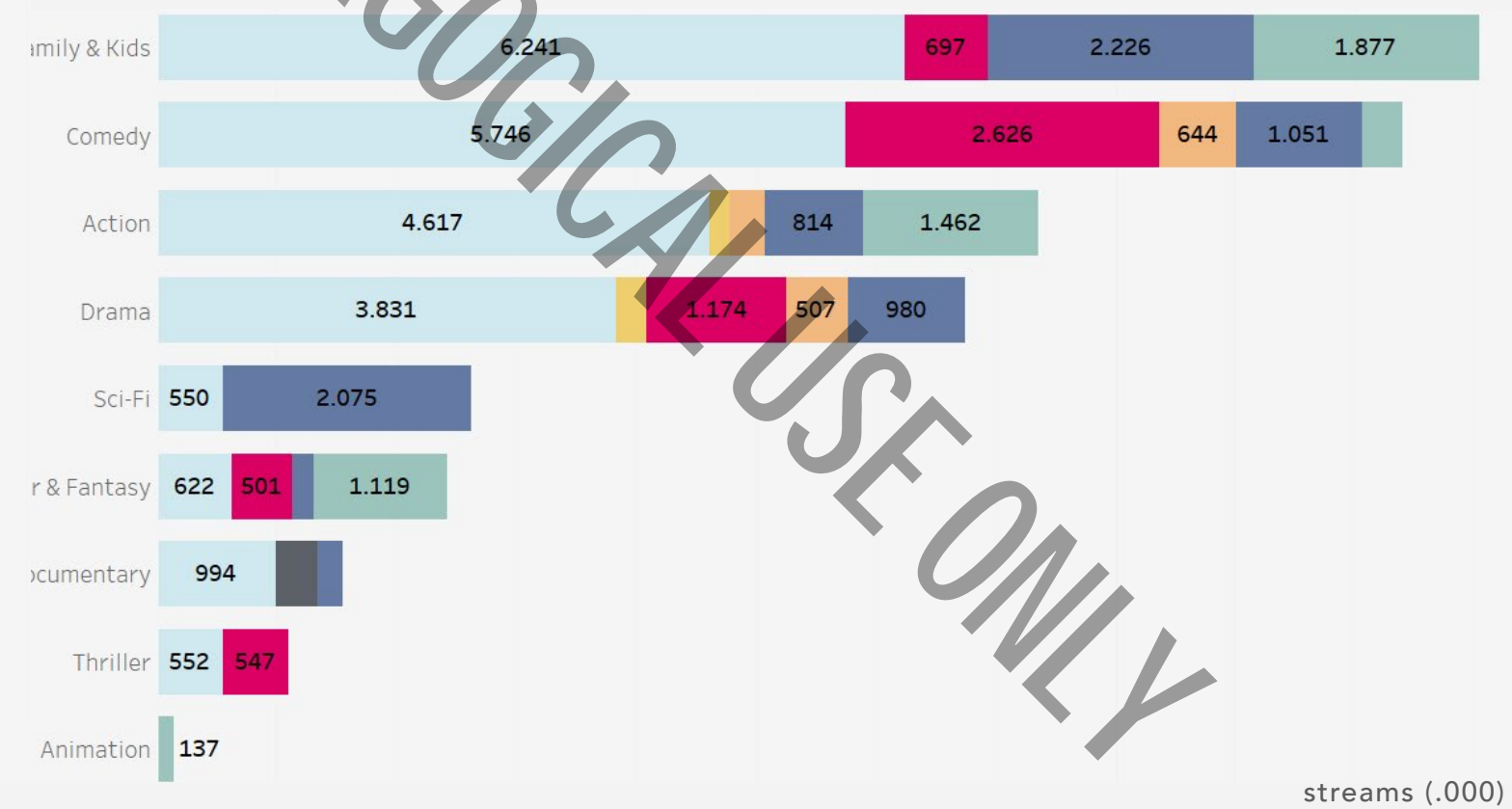
CATALOG SHARE BY COUNTRY

NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES

NETFLIX - AMAZON



streams (.000)

ANIME FEVER HITS SPANISH AUDIENCES

The content experienced a spectacular increase, going from 3% in the previous months to 11% in this report. China-US action-adventure-comedy movie directed by Scott Waugh and written by Arash Amel made the podium with 1.4 million streams. Asian content offers a vast and wide-ranging catalogue of entertainment for teenagers and young adults, which is why Netflix has taken a keen interest in it. "Zom100: Bucket List of the Dead", is a crazy ride from the Japanese horror-comedy targeting teens and young adults which comes from a Manga series written by Haro Aso. The film reached the 1.1M streams mark in Top 6.

KIDS VIEWERSHIP IN THE HOUSEHOLDS RULES THE CHART

American productions dominate Family & Kids content with a 75% genre share, totalling 6.2M streams across 24 flicks. Netflix and Disney+ are the main entertainment suppliers for family households, with Adam Sadler's "You are SO not invited to My Bat Mitzvah!" in the first position. The coming-of-age comedy-drama film got an acceptable performance of 845K streams. To close Top 10, the book adaptation "Happiness for Beginners" is a romcom directed by Jennifer Kaytin Robinson, which is known for teen hits "Do Revenge" and "Thor: Love and Thunder".

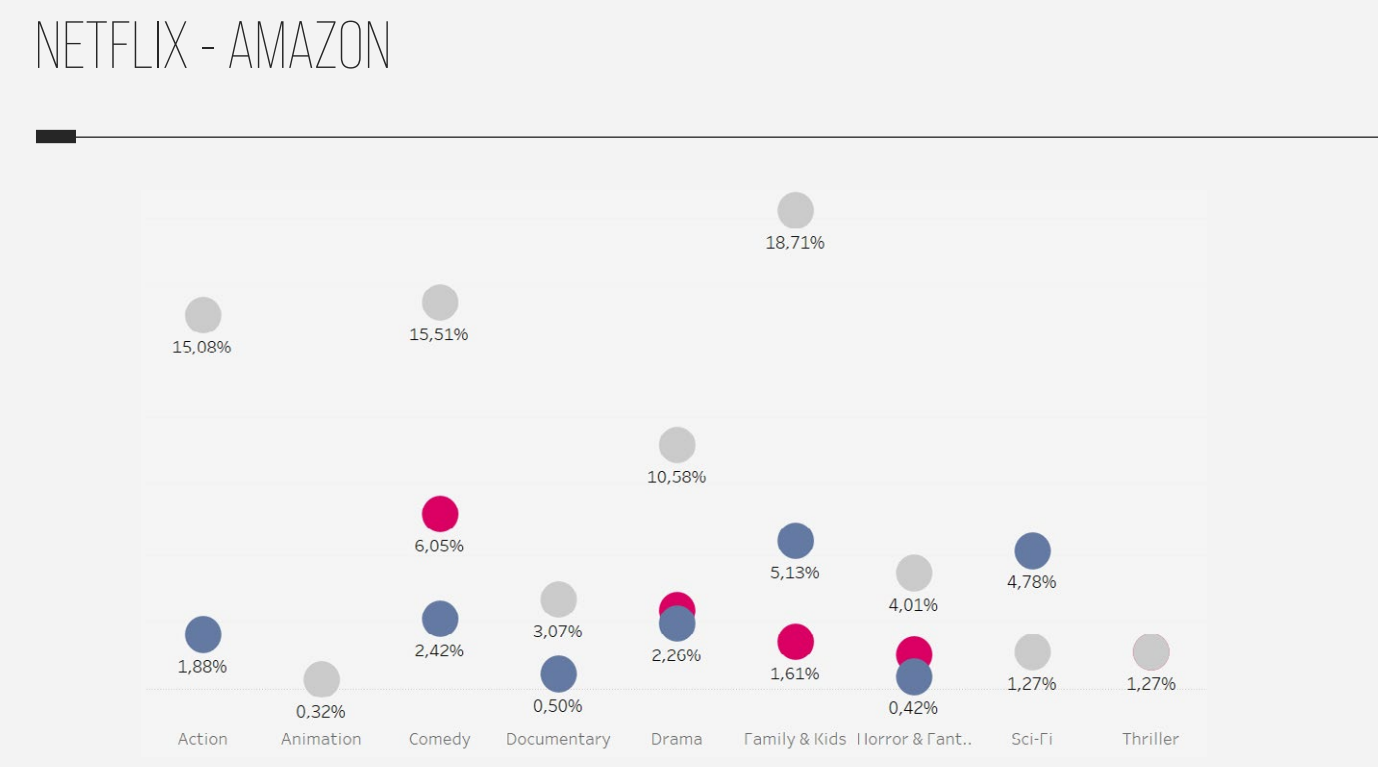
SPAIN | 100 MOVIES | EUROPEAN FOCUS

LOCAL AND EUROPEAN MOVIES IN THE TOP 100 NETFLIX - AMAZON



SHOWING 15 | 22 – [See complete chart here](#)

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

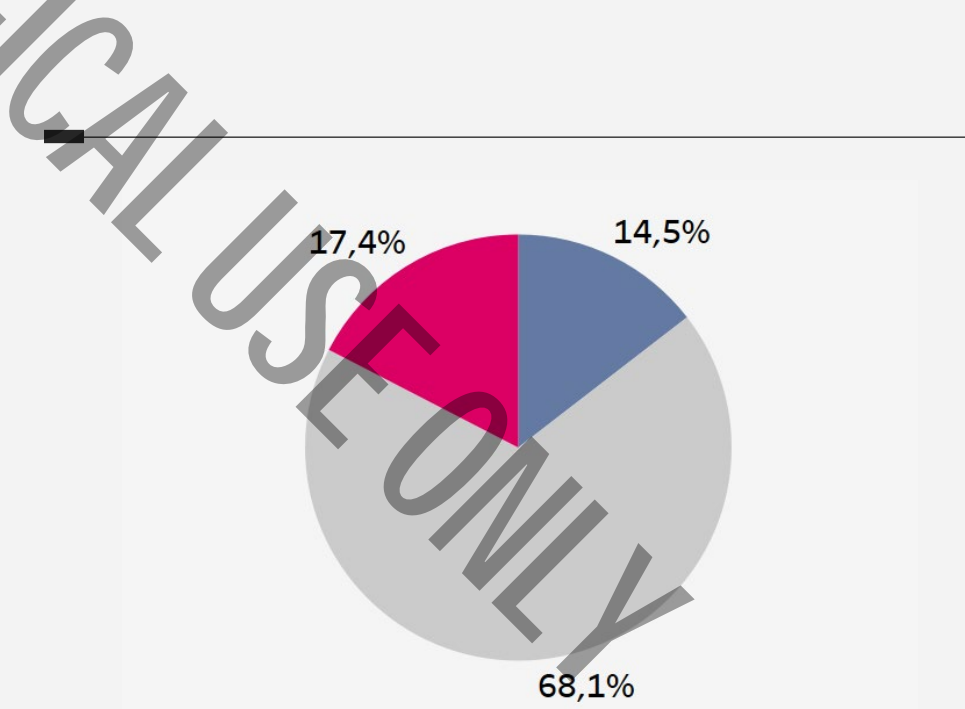


NUMBER OF TITLES BY GENRES NETFLIX - AMAZON

NETFLIX - AMAZON

GENRE	EU	SPAIN
Action	2	
Comedy	2	4
Documentary	1	
Drama	2	2
Family & Kids	4	1
Horror & Fantasy	1	1
Sci-Fi	1	
Thriller		1

CONTRIBUTION TO DRAMA STREAMS



PRODUCTION COUNTRIES | EUROPE | SPAIN | OTHERS

EUROPEAN CONTENT SURPASSED LOCAL CONTENT IN ITS DOMESTIC MARKET

The engines were pressed, and Spanish content, even playing at home, was outdone with a 4-point raise by European flicks. This trend is quite exceptional in our reports, and might mean that, as Netflix designs Glocal content for several European markets, they become more permeable. While just 13 titles reached the top of the list, most reached even better marks above the top 20. Half of the list collected over 600K streams, with the German sci-fi dystopia "Paradise" being the flagship with 2M streams after more than 6 weeks on the list. European productions like the French sensation for kids "Ladybug and Cat Noir" and "Mavka: The Forest Song" have anchored European studios as a viewership locomotive for the youngest audience and, together with "The Stolen Princess", scored the best mark for a genre with 2.2M streams. Polish content keeps some titles in the top spot: comedy sequel "Squared Love Everlasting" and action "Soulcatcher" conquered the European chart.

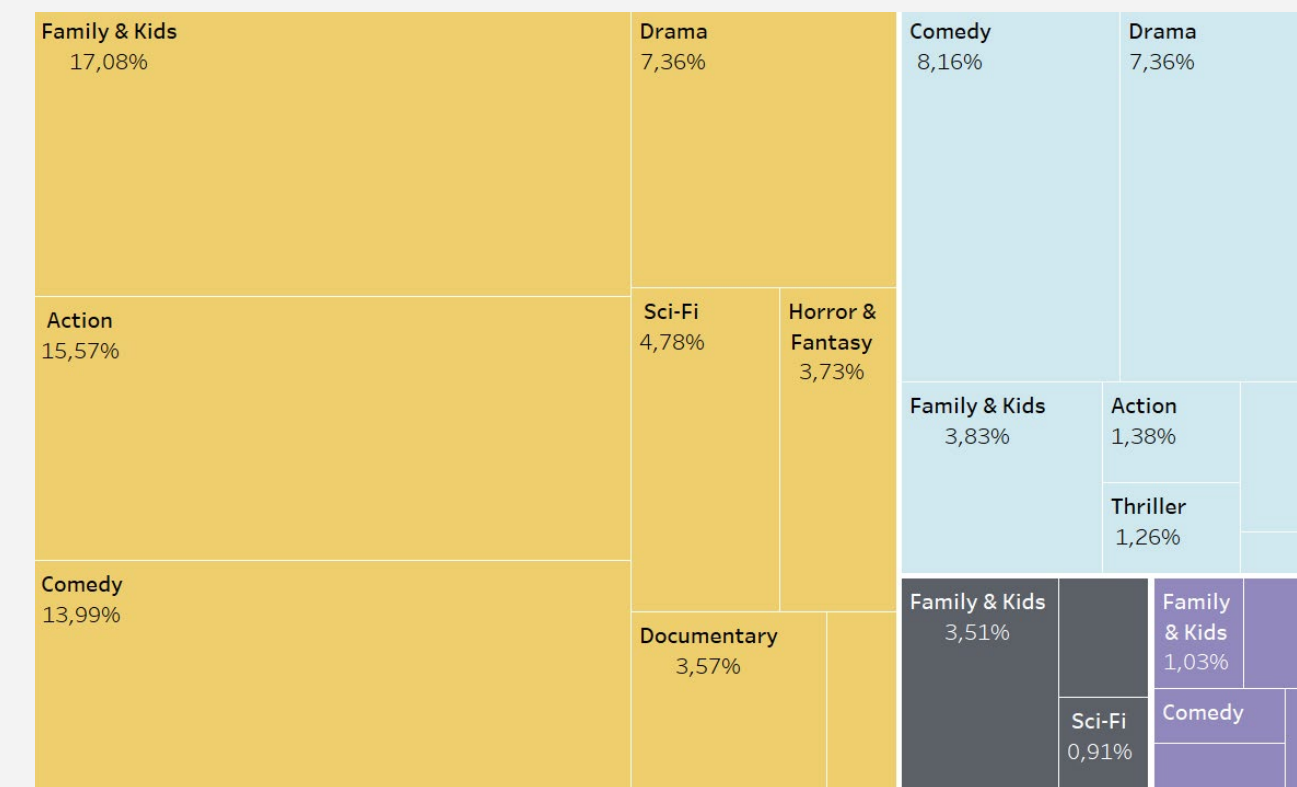
LOCAL COMEDIES TOOK UP 5% OF THE TOP 100

Spanish content scored some balls on Comedy with a 13% share of the genre, having "Hotel de los líos" on Amazon Prime Video and "Escape Room (L' hora de la veritat)" leading the top of the list. Local Drama is boosted by Amazon MGM studios "Fatum" starring Luis Tosar, and Álex García, and produced by Pedro Almodóvar.

SPAIN | 100 MOVIES | SVOD PLATFORMS

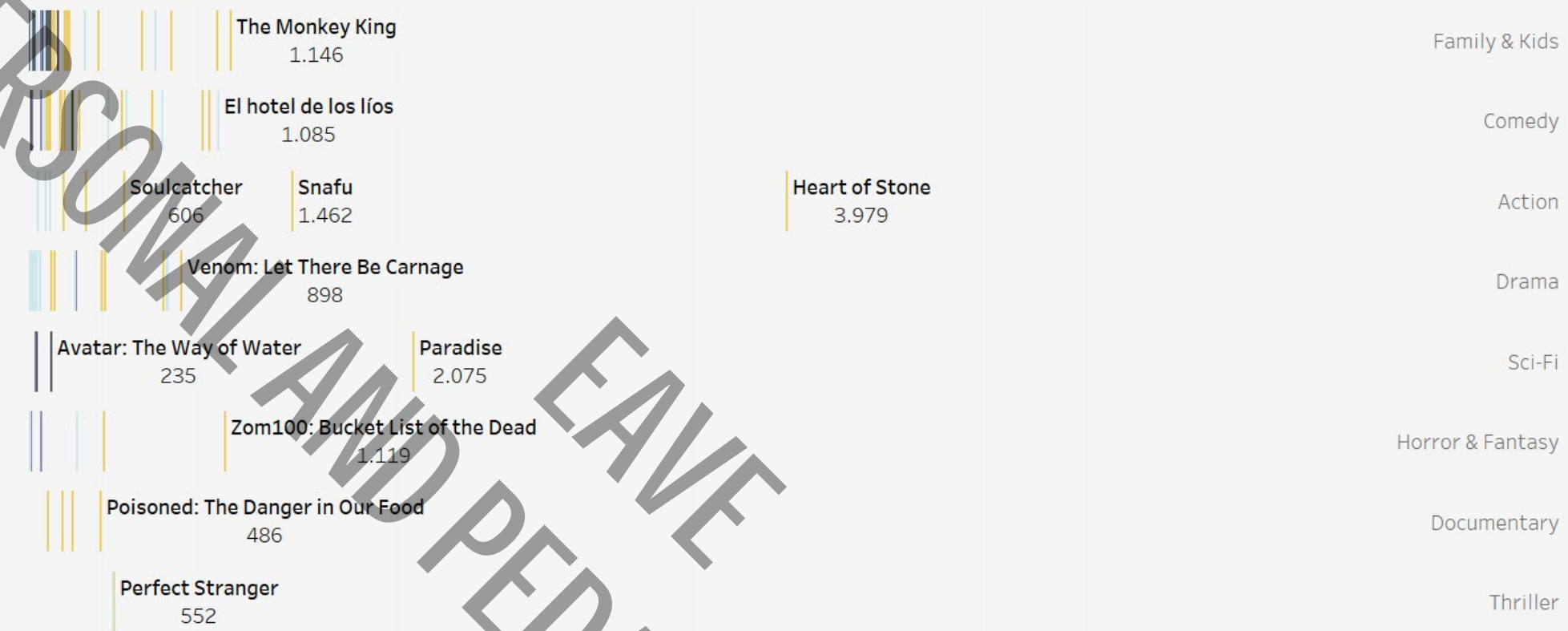
MOST WATCHED GENRES

SHARE BY PLATFORM

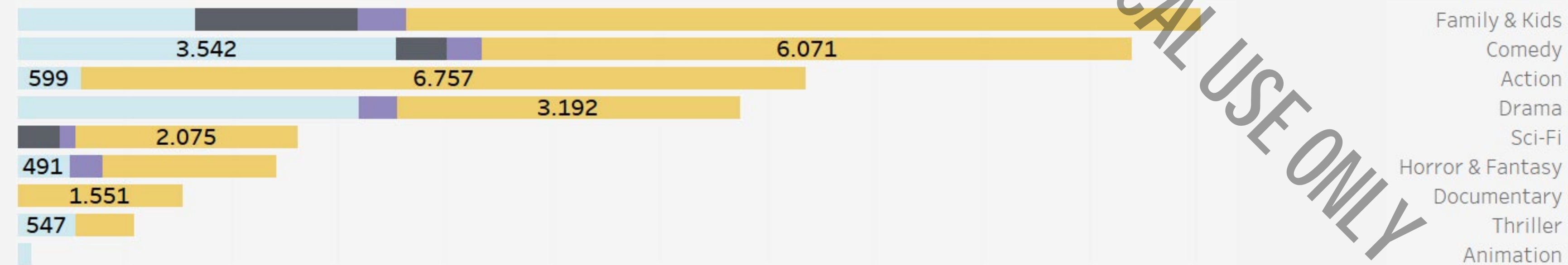


TOTAL STREAMS BY GENRES

PLATFORM COMPARATIVE



TOP MOVIES STREAMS BY GENRES



OTT | AMAZON | NETFLIX | HBO MAX | DISNEY

AMAZON PRIME VIDEO HITS YET A NEW RECORD WITH A 23% SHARE

Boosted by the high numbers of Blogmedia and RTVE production, "El Hotel del Los Líos"; Prime Video achieved the highest mark in the Spanish market not seen since December 2021. Despite the fierce competition in the streaming wars, the e-commerce giant has managed to maintain a steady market share of around 18% this quarter. The success of local comedies and teen melodramas has contributed to this achievement and has brought Amazon to the top. Content linked with the biggest e-shop can also be a massive winning hand in the upcoming future.

CLIMBING AND CLINGING: THE DIVIDED DRIVE

In August, Netflix was the most popular streaming platform, with 29.2M streams, accounting for 67% of the total. However, their lead slightly decreased. On the other hand, Amazon Prime Video was the only platform that saw growth this month. While Netflix remained on top, other platforms saw a drop in their rankings. Disney+ came in third place, focusing on delivering content for the Family & Kids segment. They had 1.5 million streams and also had some participation in comedies. Even if the first content of the entertainment empire only appears at #36 ("Guardians of the Galaxy Vol.3"). HBO Max only listed 6 titles on their chart, with "Todos lo Hacén" being the best performer at #74.

SPAIN | 100 SHOWS | OVERVIEW

TOTAL STREAMS BY SHOW

NETFLIX - AMAZON

Nº	MOVIE	PLATFORM	GENRE	STREAMS
1	Bluey	Disney+	Family & Kids	29.556
2	Modern Family	Disney+	Comedy	17.424
3	Heartstopper	Netflix	Family & Kids	15.106
4	Futurama	Disney+	Comedy	14.747
5	Gossip Girl	Netflix	Family & Kids	14.259
6	Un cuento perfecto	Netflix	Comedy	14.030
7	The Bear	Disney+	Drama	11.405
8	Grizzly and the Lemmings	Netflix	Family & Kids	11.325
9	The Lincoln Lawyer	Netflix	Drama	9.317
10	The Smurfs	Netflix	Family & Kids	8.474
11	Ballers	Netflix	Comedy	8.038
12	And Just Like That...	HBO Max	Comedy	7.899
13	Who Is Erin Carter?	Netflix	Action	7.360
14	The Summer I Turned Pret..	Amazon	Drama	7.186
15	Painkiller	Netflix	Drama	6.919
16	Manifest	Netflix	Drama	6.713
17	PAW Patrol	Amazon	Family & Kids	1.552
18	The Witcher	Netflix	Drama	5.081
19	The Last Hours of Mario B..	Netflix	Documentary	6.443
20	Baki Hanma	Netflix	Animation	5.854
21	Only Murders in the Buildi..	Disney+	Comedy	5.373
22	The Amazing World of Gu..	HBO Max	Family & Kids	5.171
23	Demon Slayer: Kimetsu no..	Netflix	Animation	4.836
24	Booba	Netflix	Family & Kids	4.383
25	King the Land	Netflix	Comedy	4.366
26	The Loud House	Netflix	Family & Kids	4.242
27	Fatal Seduction	Netflix	Drama	4.080
28	Secret Invasion	Disney+	Drama	3.934
29	Friends	HBO Max	Comedy	3.180
30	Captain Fall	Netflix	Comedy	3.180
31	Mask Girl	Netflix	Comedy	3.031
32	The Tailor	Netflix	Drama	2.984
33	From	HBO Max	Drama	2.983
34	Grey's Anatomy	Disney+	Comedy	2.862
35	Ragnarok	Netflix	Drama	2.830
36	Good Omens	Amazon	Action	2.822
37	Ahsoka	Disney+	Drama	2.775
38	Chicago Med	Amazon	Drama	2.770
39	Sweet Magnolias	Netflix	Drama	2.764
				2.586

SHOWING 39 | 61 - [See complete chart here](#)

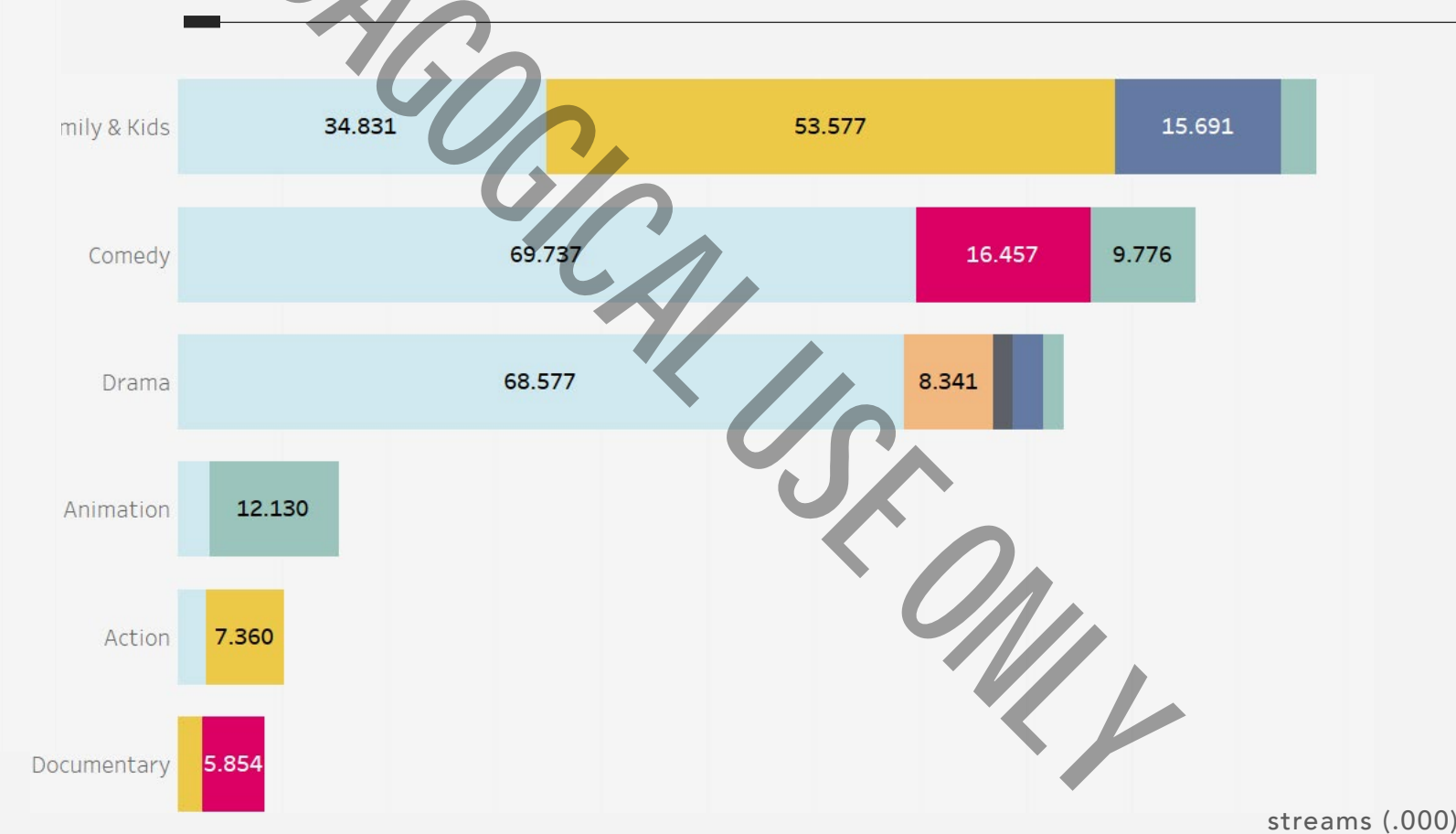
CATALOG SHARE BY COUNTRY

NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES

NETFLIX - AMAZON



streams (.000)

PRODUCTION COUNTRIES | USA & CANADA | EUROPE | SPAIN | ASIA | UK | LATAM | OTHER

A VERY RELAXED TIDE ON THE SHORES OF SPANISH STREAMS

No upward or downward movement; the Spanish market is the only one weathering the strong summer waves and managing to stabilise. The Spanish market has remained in this state since February 2022, enduring all kinds of storms. In any case, it continues to hold its third position as the largest market, so, after all, everything is going well, isn't it? We estimate this stability is much appreciated by the streamers executives who live in a constant storm.

COMEDY, FAMILY & KIDS, AND DRAMA FEVER FOR THE MONTH OF AUGUST

The Animation genre loses 14 points compared to the previous month, making room for Comedy, Family & Kids, and Drama to shine, three genres that account for almost 85% of the streams in this list. Among the most successful series this month, we have "Bluey," reaching 30 million streams. We also find "Modern Family" and the heartwarming "Heartstopper". This month, USA & Canada productions manage to increase their position by 10 points compared to the previous month. When combined with the nearly 20% share from the UK, this paints an unfavourable picture for non-English language productions, making room for more diverse content.

SPAIN | 100 SHOWS | EUROPEAN FOCUS

LOCAL AND EUROPEAN SHOWS IN THE TOP 100

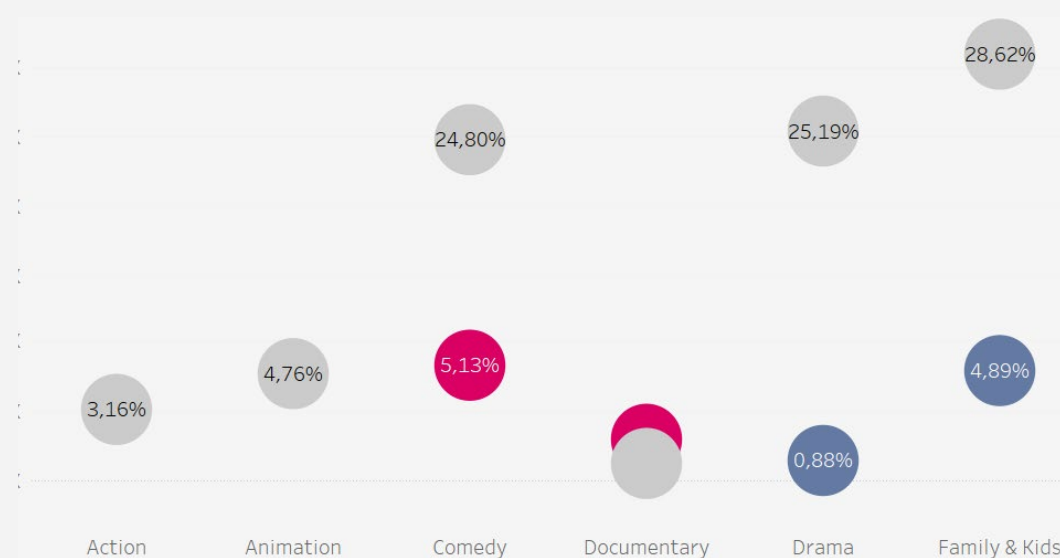
NETFLIX - AMAZON

Nº	MOVIE	SEASON	PLATFORM	COUNTRY	RANKING	GENRE	STREAMS
1	Un cuento perfecto	1	Netflix	ES	1	Comedy	14,030
2	Grizzly and the Lemmings	3	Netflix	FR	3	Family & Kids	9,071
3	The Last Hours of Mario B...	1	Netflix	FR	34	Family & Kids	2,254
4	Booba	5	Netflix	RU	39	Family & Kids	2,150
5	Ragnarok	3	Netflix	NO	22	Drama	2,216
6	Aquí no hay quien viva	4	Netflix	ES	29	Comedy	2,822

SHOWING 6 | 6 - [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	1	2
Documentary	1	1
Drama	1	0
Family & Kids	2	0

CONTRIBUTION TO DRAMA STREAMS



PRODUCTION COUNTRIES | EUROPE | SPAIN | OTHERS

EUROPEAN CONTENT SURPASSED LOCAL CONTENT IN ITS DOMESTIC MARKET

The engines were pressed, and Spanish content, even playing at home, was outdone with a 4-point raise by European flicks. This trend is quite exceptional in our reports, and might mean that, as Netflix designs Glocal content for several European markets, they become more permeable. While just 13 titles reached the top of the list, most reached even better marks above the top 20. Half of the list collected over 600K streams, with the German sci-fi dystopia "Paradise" being the flagship with 2M streams after more than 6 weeks on the list. European productions like the French sensation for kids "Ladybug and Cat Noir" and "Mavka: The Forest Song" have anchored European studios as a viewership locomotive for the youngest audience and, together with "The Stolen Princess", scored the best mark for a genre with 2.2M streams. Polish content keeps some titles in the top spot: comedy sequel "Squared Love Everlasting" and action "Soulcatcher" conquered the European chart.

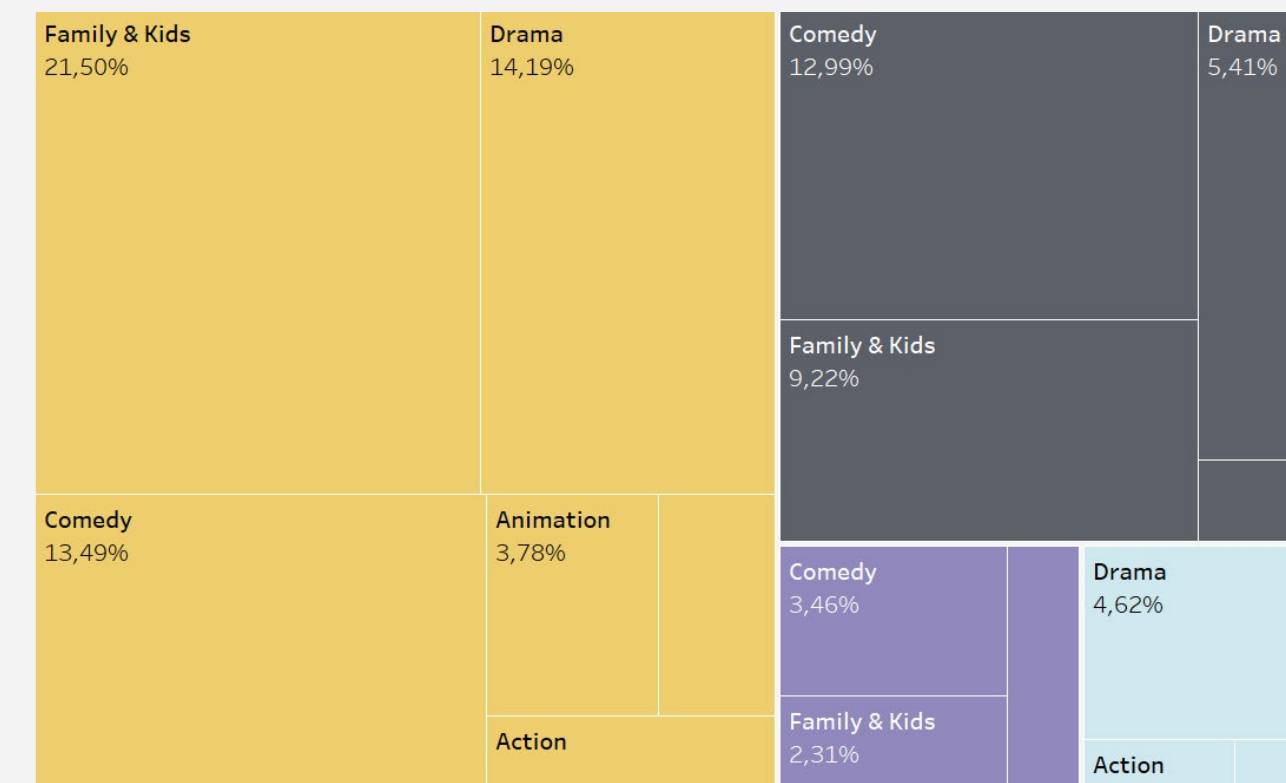
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SPAIN | 100 SHOWS | SVOD PLATFORMS

MOST WATCHED GENRES

SHARE BY PLATFORM

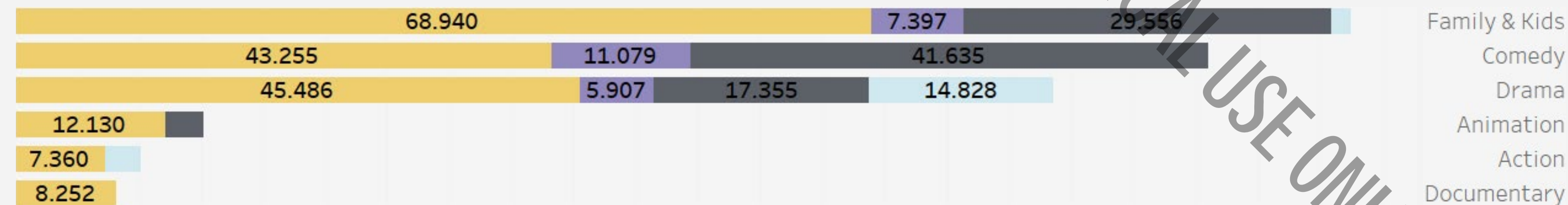


TOTAL STREAMS BY GENRES

PLATFORM COMPARATIVE



TOP SHOWS STREAMS BY GENRES



OTT | AMAZON | NETFLIX | HBO MAX | DISNEY

SPANISH SHOWS EXPERIENCE THEIR WORST SHARE

Local and European productions are making the most of the limited space left by American productions. Regarding the former, while 2023 has generally proven to be a rather stable month for Spanish series, August appears to be an exception. In August 2023, Spanish series have reached their historical low since data tracking began in Think Data reports, comprising only 7% of the total streams. This share is primarily attributed to "Un Cuento Perfecto" (14M) and "The Last Hours of Mario Biondo" (5.8M). The former is produced by Plano a Plano for Netflix, and the latter by Par Producciones, a documentary-focused production company, also for Netflix. Is it just an isolated bad month for Spanish shows or a harder and harder competition for those industries that were early adopters of the Netflix era?

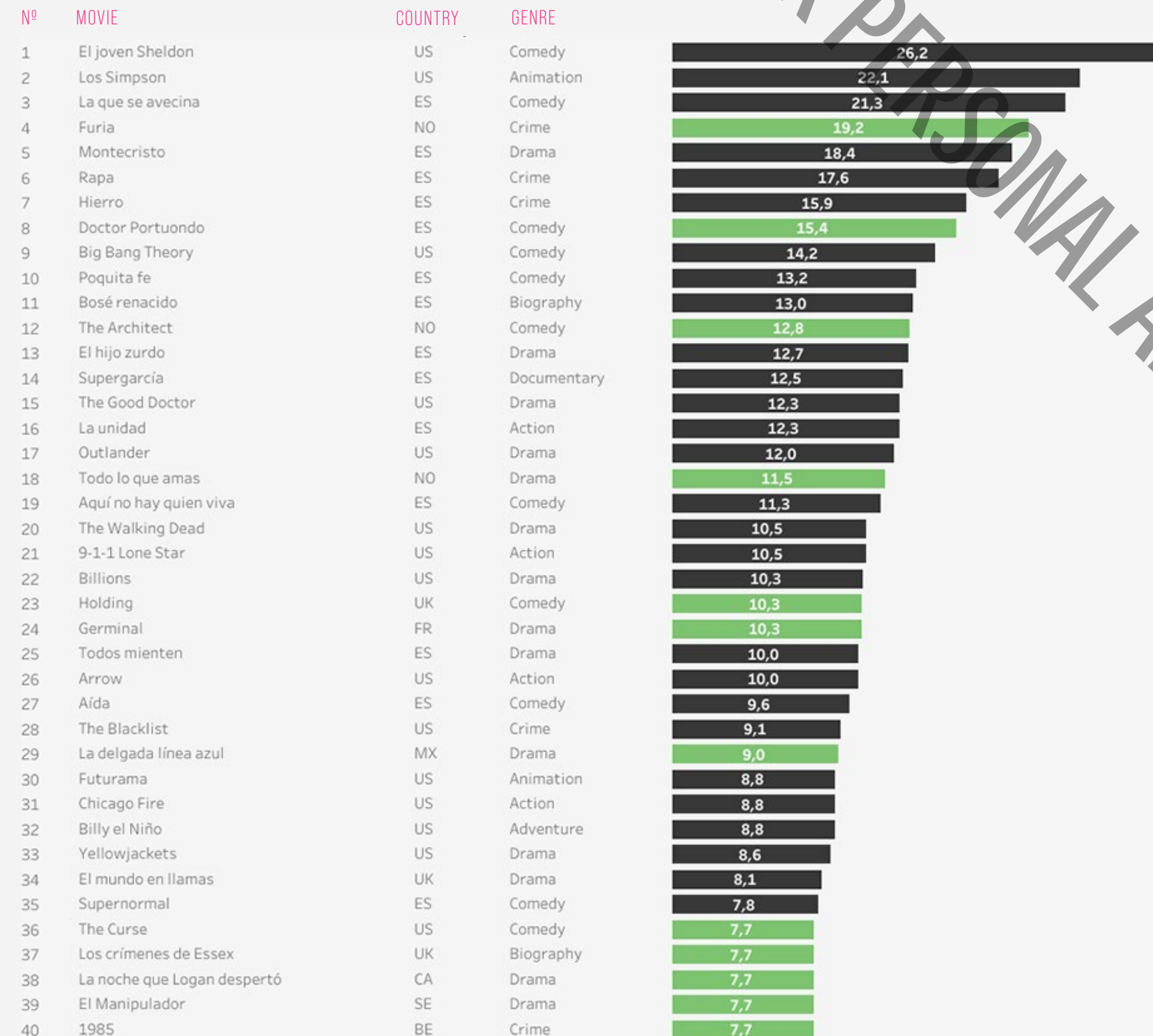
TODDLERS CONTENT RULE EUROPEAN SHOWS

On the European production front, children's content shines, with long-lasting "Grizzy and Lemmings" and "Booba" accumulating 11.M and 4.3M streams each this month. Additionally, "Ragnarok," a series that reimagines Norse mythology and is present in all markets, gathers almost 17M streams.

SPAIN | 60 SHOWS | SVOD PLATFORMS

TOP 60 SHOWS : TOTAL SHOWS

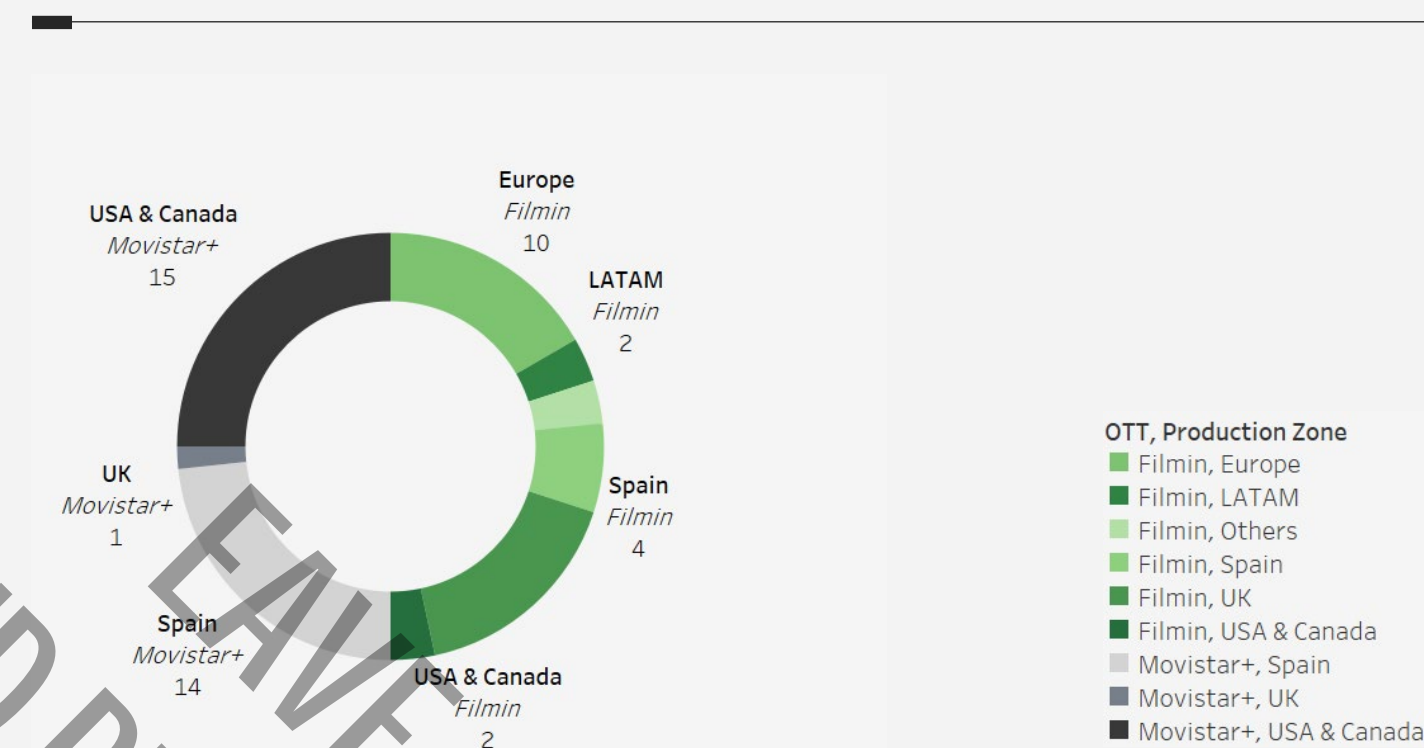
FILMIN - MOVISTAR



SHOWING 40 | 60 - [See complete chart here](#)

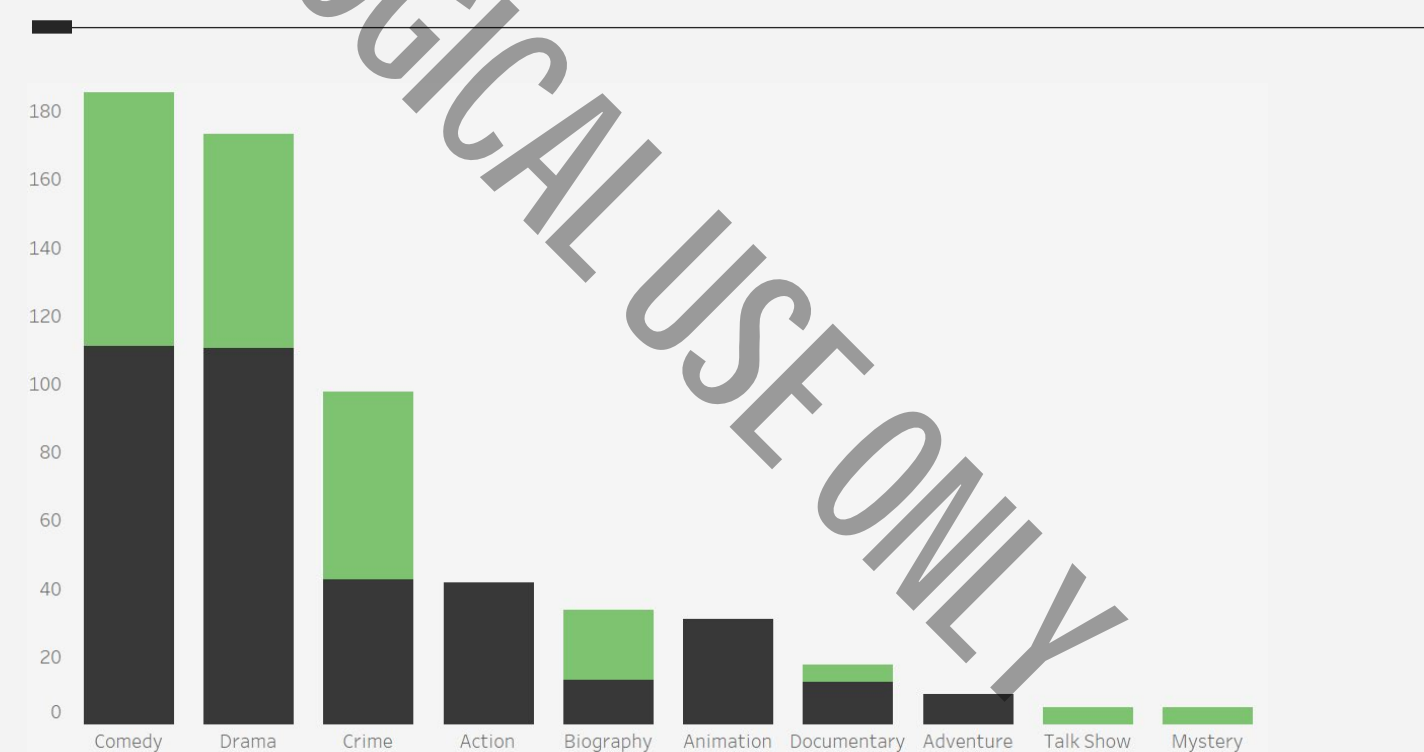
NUMBER OF TITLES BY PRODUCTION ZONE AND OTT

FILMIN - MOVISTAR



SHARE PERFORMANCE BY GENRES AND OTT

FILMIN - MOVISTAR



OTT | FILMIN | MOVISTAR

DIVERSIDAD EUROPEA Y PROTAGONISMO DE LAS SERIES DE ACCIÓN

Si el mes pasado decíamos que el Top #5 de esta lista donde se concentraban los grandes IPs del mundo de las series, este trimestre este tipo de producciones se concentran sólo en el Top #3, concretamente en series locales e internacionales con series como "El Joven Sheldon", "Los Simpsons" o "La que se avecina". Es "Furia" la primera producción que se sale un poco esta categoría de grandes producciones, subiendo en el ranking, de #15 a #6, teniendo ahora enganchados a un 19.2% de la dueñai de la plataforma catalana.

Más adelante en este ranking encontramos muchas producciones españolas. Concretamente, 18 títulos, uno menos que lo que reportamos en el mes pasado. En este mes, es otra vez Movistar+ quien aporta más producciones locales como "Montecristo" (18.4), "Rapa" (17.6), "Hierro" (15.9). A parte de eso, Movistar+ sólo ofrece otras series de habla inglesa. Es Filmin quien está aportando más diversidad europea, sobre todo noruegas, con series como "The Architect" (12.8), "Todo lo que amas" (11.5) y "Germinal" (10.3).

Además, de forma paralela a cómo observamos en el resto del reporte con las plataformas más grandes, vemos que la cantidad de producciones e Acción crece en número, un género en el que destacan series como "La Unidad" (12.3), "911 - Lone Star" (10.5), y "Arrow" (10).

HOLLYWOOD'S AI ERA SETS THE TONE FOR CREATIVE INDUSTRY: BEYOND BLOCKBUSTERS AND STRIKES

There's a seismic shift underway in Tinseltown. Sure, Hollywood's grappling with the SAG-AFTRA strike and content vacuums on the horizon. Studios and streamers like Netflix are battling competition, inflation, and international conflicts. All of this also shakes the Glocal content and brings uncertainty to the current European models. But beneath the surface, there's an even bigger plot twist: Artificial Intelligence (AI).

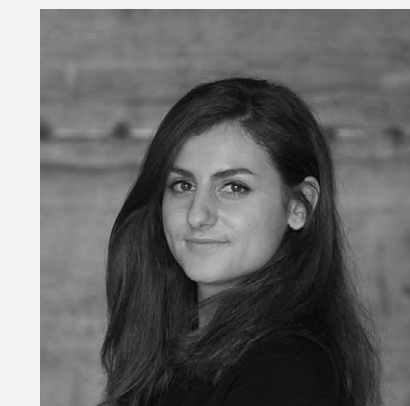
Hollywood analysts are calling off streaming companies, urging them to look beyond their creative output and act like the tech giants that have done so much to disrupt the business model of the entertainment industry.

“**The platforms will be kind of mini theme parks: They'll serve food and drink, sell merchandise and include “immersive” installations based on its hit titles like “Squid Game” or “Stranger Things”.**

The Writers Guild of America (WGA) dropped a bombshell with their pre-agreement on AI, which nowadays remains unsigned. In a nutshell, the industry is waking up to the power and ethics of AI. The issue isn't just about “robots writing scripts.” It's about understanding, integrating, and benefiting from tech, all while safeguarding the rights of humans in the process. For instance, AI may draft a story, but the human touch, the writer, takes credit and gets compensated.



But this isn't just about writing. OpenAI's integration of DALL-E into GPT-3 opens doors to innovative brand mashups. Netflix embraced the disruptive way when it took a groundbreaking step at summer's end, revealing plans to launch its inaugural physical storefronts, with eyes on debuting two in the U.S. in 2025. The platforms will be kind of mini theme parks: They'll serve food and drink, sell merchandise and include “immersive” installations based on its hit titles like “Squid Game” or “Stranger Things”.



CELIA FUMANAL
INNOVATION DIRECTOR

Bridging virtual and reality involves generative AI that could revolutionise marketing and community engagement.

Variety has aptly labelled this trend as “branded AI”, suggesting that it's a bridge between movies and the booming gaming world. But while Hollywood explores AI's opportunities, it must also address its challenges—chief among them fair residuals (we will deep into this in next September issue). The WGA and SAG-AFTRA strikes have brought this issue to the forefront, igniting age-old, still unprecedented, debates on compensating artists in the digital age. As streaming giants like Netflix redefine entertainment, some argue the industry's future lies in merging entertainment with tech.

So, what's the final act in Hollywood's AI drama? And how are platforms embracing the trend? It's not just about surviving; it's about evolving. Instead of solely focusing on content, Hollywood needs to embrace its tech side while being fair to its talent. The true potential of AI might lie in monetizing marketing.

Whether through venture capital in tech or licensing intellectual properties, the future of entertainment could be a beautiful blend of creativity and technology.

The audiovisual industry finds itself at a crossroads, one thing is clear: the script for the future is still being written, and it promises to be an international smash.

ITALY | 100 MOVIES | OVERVIEW

TOTAL STREAMS BY MOVIE

NETFLIX - AMAZON

Nº	MOVIE	PLATFORM	GENRE	STREAMS
1	Heart of Stone	Netflix	Action	1,923
2	Paradise	Netflix	Action	1,114
3	Ghostbusters: Afterlife	Netflix	Adventure	1,089
4	Red White & Royal Blue	Amazon	Comedy	1,052
5	What Men Want	Netflix	Comedy	840
6	Guardians of the Galaxy V..	Disney+	Action	799
7	The Covenant	Amazon	Action	727
8	Bandit	Amazon	Crime	677
9	A Man Called Otto	Amazon	Comedy	667
10	John Wick: Chapter 4	Amazon	Action	655
11	Happiness for Beginners	Netflix	Comedy	652
12	Ladybug and Cat Noir: Aw..	Netflix	Animation	598
13	Kandahar	Amazon	Action	567
14	You Are SO Not Invited to ..	Netflix	Comedy	534
15	The Meg	Netflix	Action	512
16	The Monkey King	Netflix	Animation	491
17	Snafu	Netflix	Action	480
18	Don't Breathe 2	Netflix	Action	464
19	Total Recall	Netflix	Action	423
20	The Lion King	Disney+	Animation	236
			Family & Kids	168
21	Venom: Let There Be Carn..	Amazon	Action	372
22	So Tutto di Te	Amazon	Family & Kids	359
23	Trigger Point	Amazon	Action	353
24	Zom100: Bucket List of th..	Netflix	Action	328
25	Squared Love Everlasting	Netflix	Comedy	319
26	Killer Book Club	Netflix	Horror & Fantasy	312
27	Moana	Disney+	Animation	298
28	American History X	Netflix	Crime	297
29	Poisoned: The Danger in O..	Netflix	Documentary	290
30	Around the World in 80 D..	Netflix	Action	286
31	Nimona	Netflix	Animation	282
32	Paprika	Netflix	Animation	280
33	La straordinaria scoperta	Netflix	Comedy	268
34	Frozen	Disney+	Animation	264
35	Don't Look Up	Netflix	Comedy	264
36	Culpa mía	Amazon	Drama	260
37	Resident Evil: Welcome to..	Netflix	Action	258
38	Do You Know Claudia?	Netflix	Comedy	256
39	The Legend of Hercules	Netflix	Action	253
40	Encanto	Disney+	Family & Kids	253

SHOWING 40 | 59 - [See complete chart here](#)

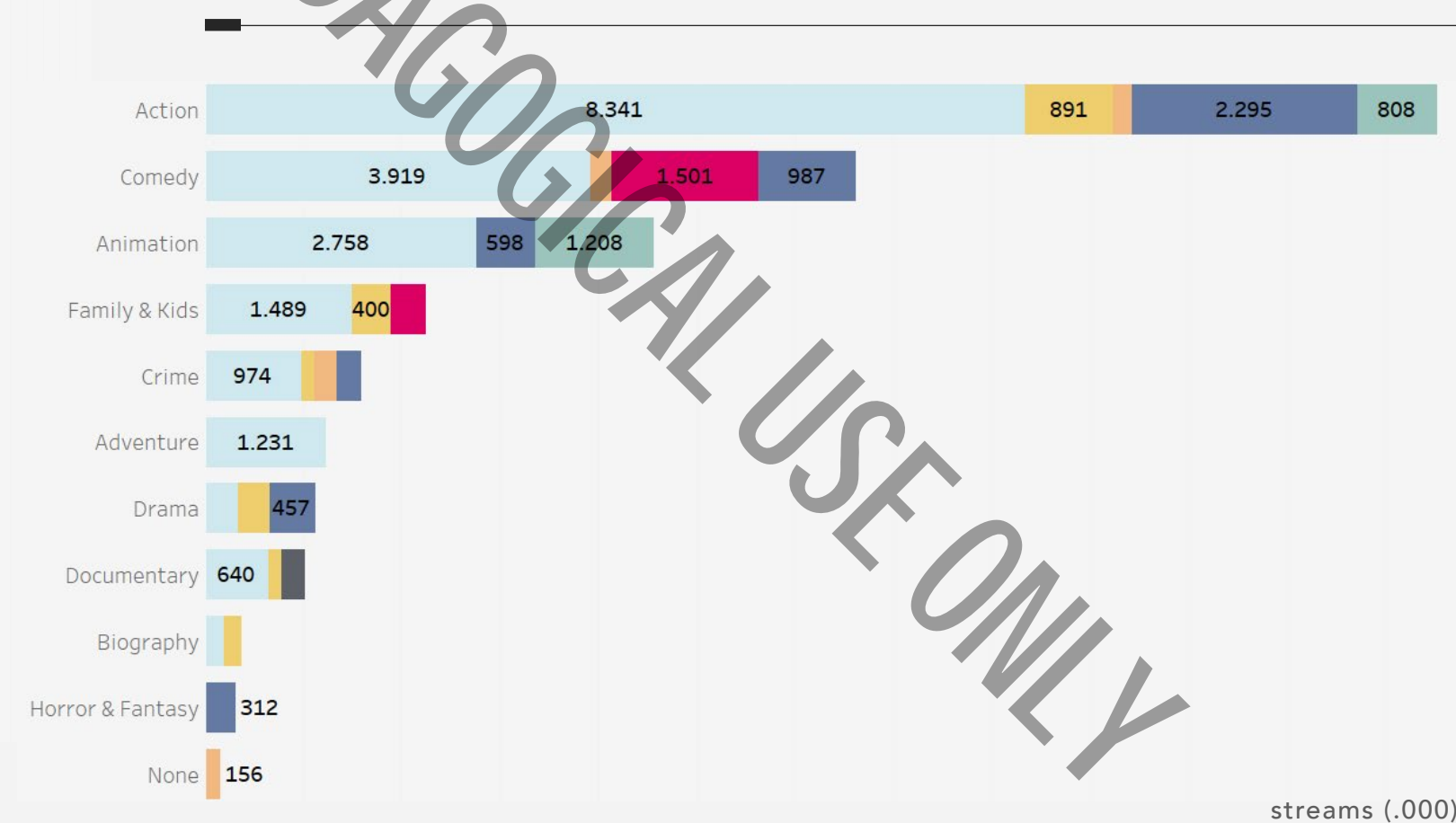
CATALOG SHARE BY COUNTRY

NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES

NETFLIX - AMAZON



streams (.000)

PRODUCTION COUNTRIES | USA & CANADA | EUROPE | ITALY | ASIA | UK | LATAM | OTHER

A SPRING SURGE AND AMERICAN CONTENT'S FALL

Italian streams experienced steady growth from February to the arrival of warmer weather in May. Since then, the Italian series market has been witnessing a decline. It is worth noting that, at least for the moment, the cumulative streaming numbers remain above the average, currently reaching 256M streams in its Top #100 seasons.

This decline predominantly impacts the presence of American content on these lists. In comparison to the preceding month, content from the USA and Canada has seen a 10-point decrease in its share, a noteworthy development.

COMEDY, DRAMA, AND FAMILY & KIDS DOMINATE ITALIAN STREAMS

After a brief break in July, Comedy returns to its natural flow in the Italian scene, accumulating almost 38% of the streams with headline series like "Un Paso Adelante" (12.2M) "Futurama" (10.2M) and the Comedy-Drama "The Bear" (9M). With the 31% claimed by the Family & Kids category with series like "Bluey" (an amazing amount of 28M) and "I Cesaroni" (8M) and the 21% tagged as Drama, the remaining share, roughly 10%, is scattered among Action, Animation, and Documentaries.

ITALY | 100 MOVIES | EUROPEAN FOCUS

LOCAL AND EUROPEAN MOVIES IN THE TOP 100

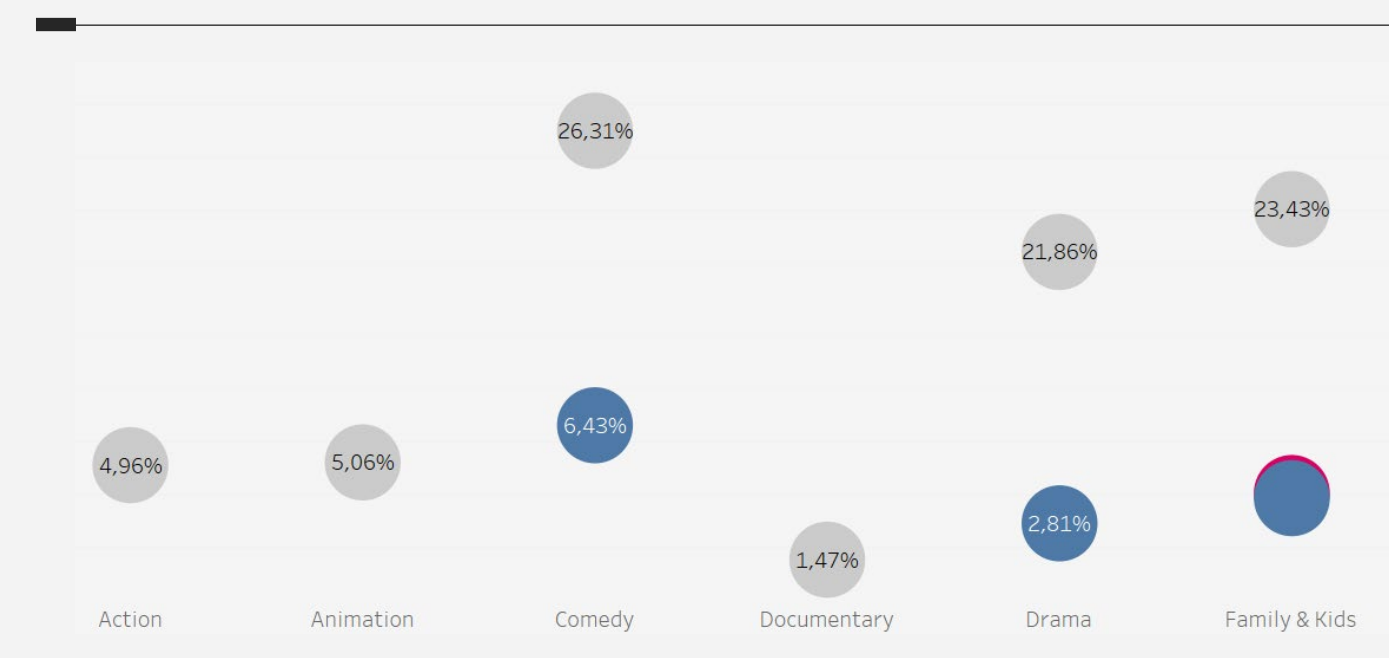
NETFLIX - AMAZON



SHOWING 6 | 8 - [See complete chart here](#)

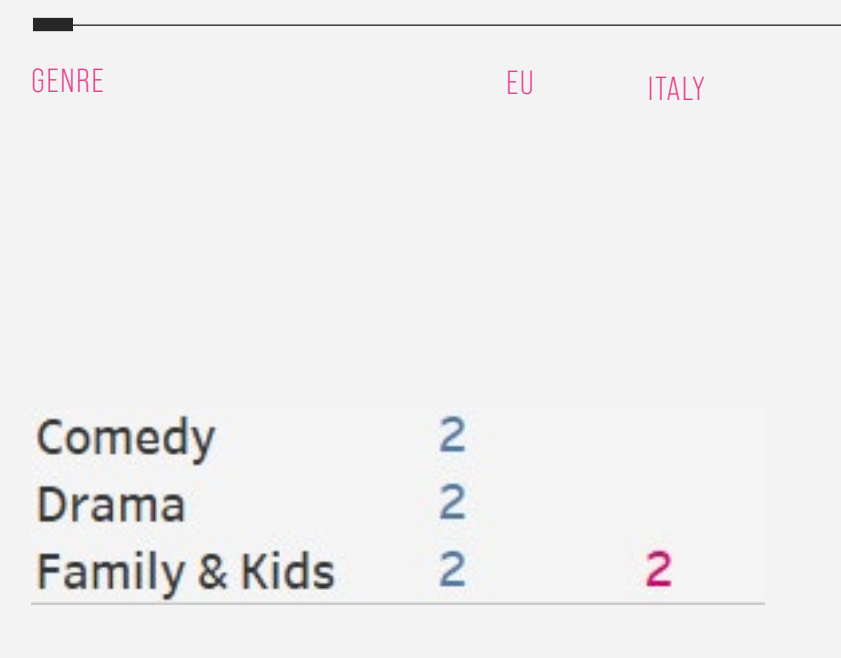
CONTRIBUTION OF LOCAL & EUROPEAN MOVIES TO TOTAL STREAMS

NETFLIX - AMAZON



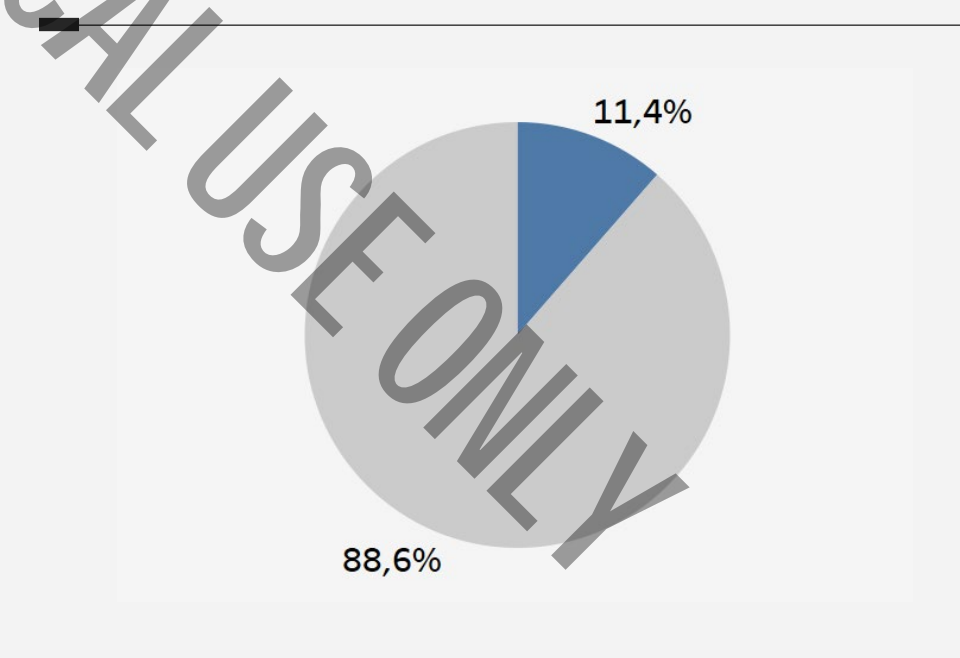
NUMBER OF TITLES BY GENRES

NETFLIX - AMAZON



CONTRIBUTION TO DRAMA STREAMS

NETFLIX - AMAZON



PRODUCTION COUNTRIES | EUROPE | ITALY | OTHERS

A LITTLE EUROPEAN RENAISSANCE FOR AUGUST

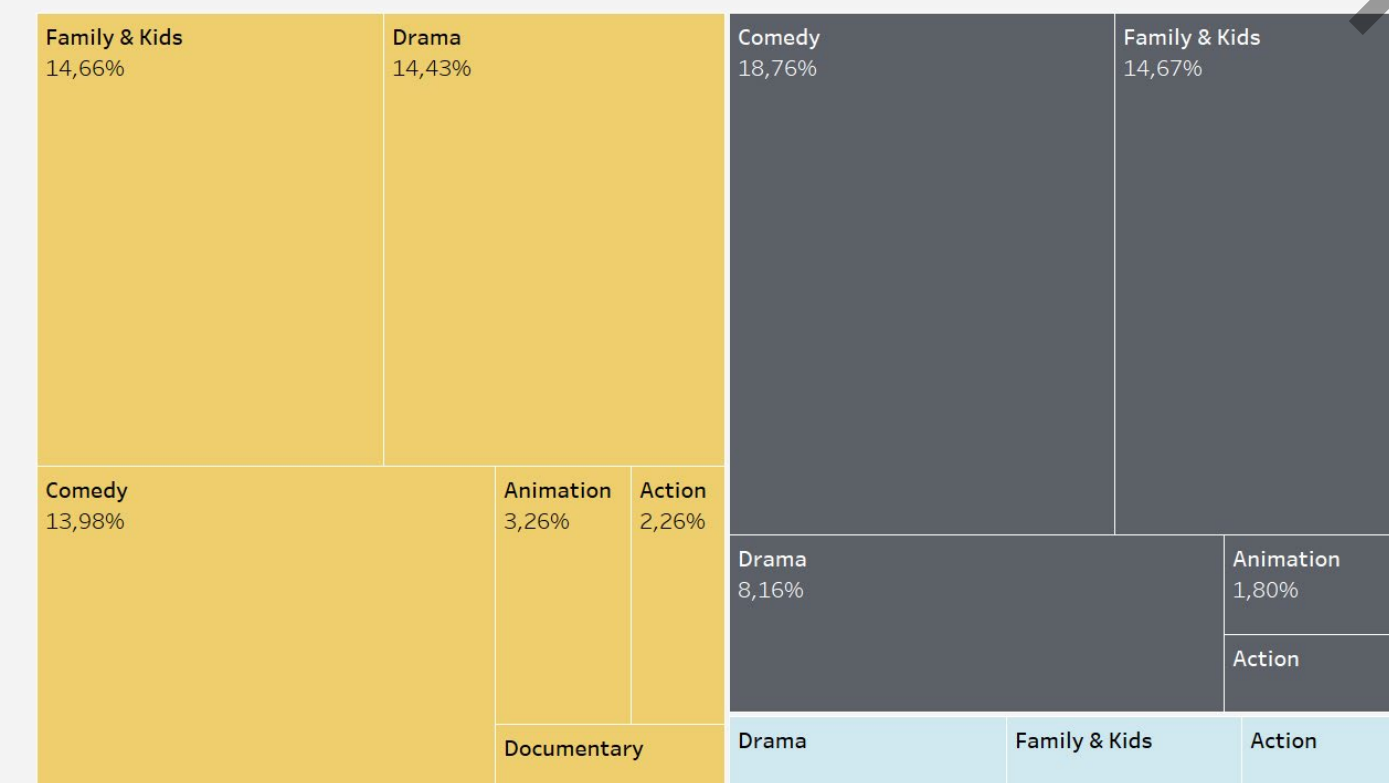
This month, European productions managed to capture a 13% share in the total among the three most coveted genres of Comedy, Family & Kids, and Drama. With 16.4M, 9.6M, and 7.2M streams respectively. The most-watched European production this month is "Un Paso Adelante" a Spanish TV drama similar to the American "Fame" which has gained international popularity since its debut in 2005 and is now making waves in Italy. Other notable series include the Spanish production of "Un Cuento Perfecto".

For local productions, the next in line is "I Cesaroni", the Italian version of the Spanish "Los Serrano", which is attracting streams from both Amazon and Netflix this month. Aside from "I Cesaroni," the only other series present is "Mare Fuori", an already Italian classic, which adds 2M views to its already impressive total of 140 million.

ITALY | 100 MOVIES | SVOD PLATFORMS

MOST WATCHED GENRES

SHARE BY PLATFORM

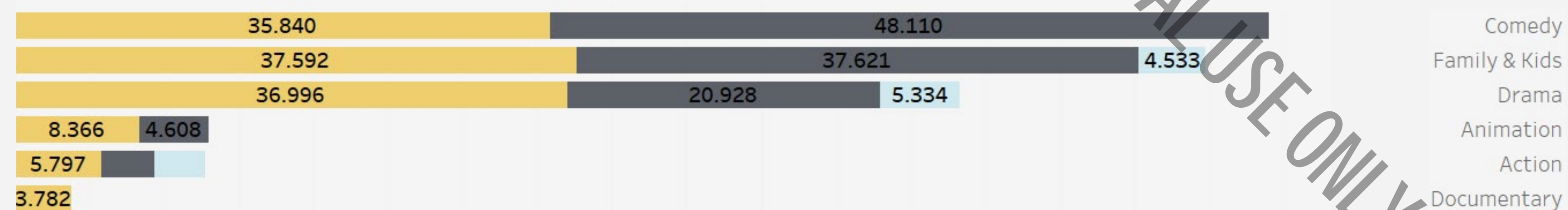


TOTAL STREAMS BY GENRES

PLATFORM COMPARATIVE



TOP MOVIES STREAMS BY GENRES



OTT | AMAZON | NETFLIX | DISNEY

DISNEY+ CHALLENGES NETFLIX AND MAKES A NEW RECORD

As we warned last month, the Italian streaming market is undergoing something unique in terms of platforms. This trend seems to be continuing. This month, Netflix loses a few more points of share, dropping to only 50% of the market share and achieving its lowest figure to date in the Italian market, with just 128M views.

Seizing this situation is Disney+, which manages to secure 44% of the streams, leaving only 5% for Prime. This is undoubtedly a milestone for Disney+, which comes closest ever in Think Data reports to challenging Netflix's market position since June 2021. Congratulations, Disney+! It remains to be seen what role Disney+ takes with RAI Play, the Italian network SVOD platform. Go and check the Italian Hot Title to learn more about it!

ITALY | 100 SHOWS | OVERVIEW

TOTAL STREAMS BY SHOW

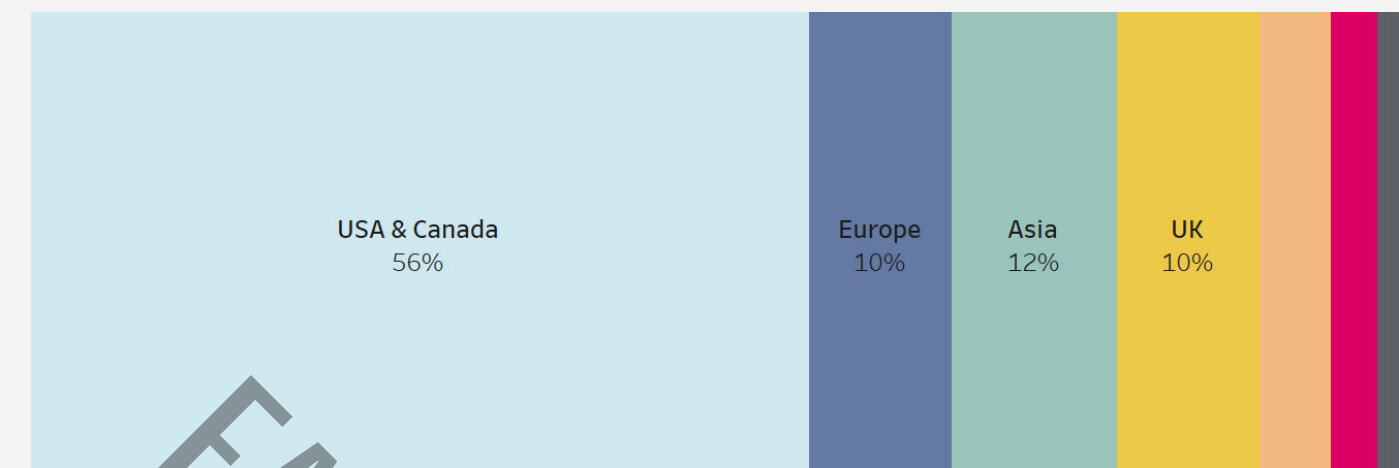
NETFLIX - AMAZON

Nº	MOVIE	PLATFORM	GENRE	STREAMS
1	Bluey	Disney+	Family & Kids	28.642
2	Gossip Girl	Netflix	Family & Kids	15.821
3	Un paso adelante	Netflix	Comedy	12.266
4	Futurama	Disney+	Comedy	10.281
5	The Bear	Disney+	Drama	9.062
6	I Cesaroni	Amazon	Family & Kids	8.401
7	The Lincoln Lawyer	Netflix	Drama	7.825
8	Scrubs	Disney+	Comedy	7.669
9	The Rookie	Netflix	Comedy	6.935
10	Once Upon a Time	Disney+	Comedy	6.443
11	Miraculous: Tales of Lady..	Disney+	Family & Kids	6.108
12	Only Murders in the Buildi..	Disney+	Comedy	6.057
13	The Good Doctor	Netflix	Drama	5.777
14	Baki Hanma	Netflix	Animation	5.645
15	The Summer I Turned Pret..	Amazon	Drama	5.334
16	Heartstopper	Netflix	Family & Kids	5.327
17	Painkiller	Netflix	Drama	5.033
18	The Office US	Netflix	Comedy	4.826
19	How I Met Your Father	Disney+	Comedy	4.671
20	Family Guy	Disney+	Animation	4.608
21	Un cuento perfecto	Netflix	Comedy	4.217
22	The Witcher	Netflix	Drama	4.155
23	Who Is Erin Carter?	Netflix	Action	3.811
24	Depp V Heard	Netflix	Documentary	3.782
25	New Girl	Disney+	Comedy	3.608
26	Bleach: Thousand Year Bl..	Disney+	Action	3.546
27	Grizzly and the Lemmings	Netflix	Family & Kids	3.487
28	Modern Family	Disney+	Comedy	3.417
29	Good Omens	Amazon	Action	3.370
30	Ragnarok	Netflix	Drama	3.061
31	Secret Invasion	Disney+	Drama	3.039
32	The Walking Dead	Disney+	Drama	3.020
33	Superstore	Netflix	Comedy	2.968
34	Basutado!! Ankoku no hak..	Netflix	Animation	2.721
35	9-1-1	Disney+	Drama	2.302
36	Manifest	Netflix	Drama	1.999
37	One Piece	Netflix	Action	1.986
38	Mare Fuori	Netflix	Family & Kids	1.976
39	Fatal Seduction	Netflix	Drama	1.975
40	Sweet Magnolias	Netflix	Drama	1.942

SHOWING 40 | 99 - [See complete chart here](#)

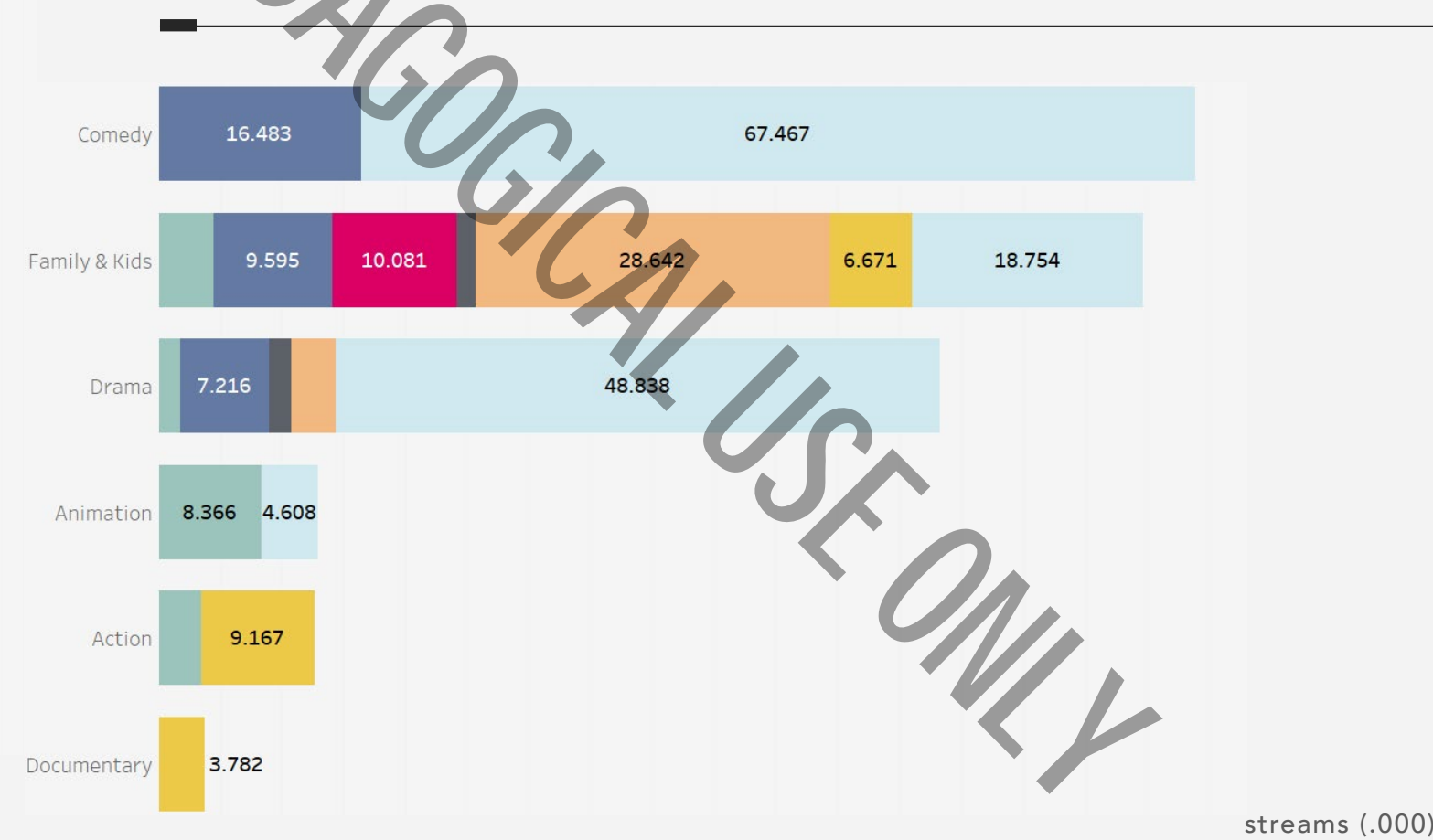
CATALOG SHARE BY COUNTRY

NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES

NETFLIX - AMAZON



streams (.000)

PRODUCTION COUNTRIES | USA & CANADA | EUROPE | ITALY | ASIA | UK | LATAM | OTHER

ACTION IS STILL THE TRENDSETTER, WITH A 40% SHARE

The genre has surged ahead as is often usual for movies, nearly doubling its closest rival, the Comedy genre, with a 21% share. Racking up 12.5M streams, Action films dominate the leaderboard, boasting 12 out of the top 24 titles. Predominantly hailing from the US, this season's most eagerly awaited films top the list. A standout among them is "Heart of Stone", featuring Gal Gadot in a thrilling role as a covert agent battling to save the world. This adrenaline-charged genre has maintained its lead since May 2023, further boosted by the original Netflix movie "The Mother". With such offerings, Netflix emphatically underscores that heroines in Action films have moved beyond a fleeting trend to become essential symbols of representation and diversity.

BRITISH CONTENT IS EXPERIENCING A REVIVAL, CAPTURING A COMMENDABLE 9% SHARE IN THE TOP 100

Leading the charge and nestled in the Top 7, "The Covenant" elevates UK standings with an impressive 727K streams. Apart from this standout, eight other titles secured their spots on the list, albeit with a modest average of 169K streams. Notables among them include "Harry Potter and The Goblet of Fire", "The Prestige", and "Rocketman".

ITALY | 100 SHOWS | EUROPEAN FOCUS

LOCAL AND EUROPEAN SHOWS IN THE TOP 100

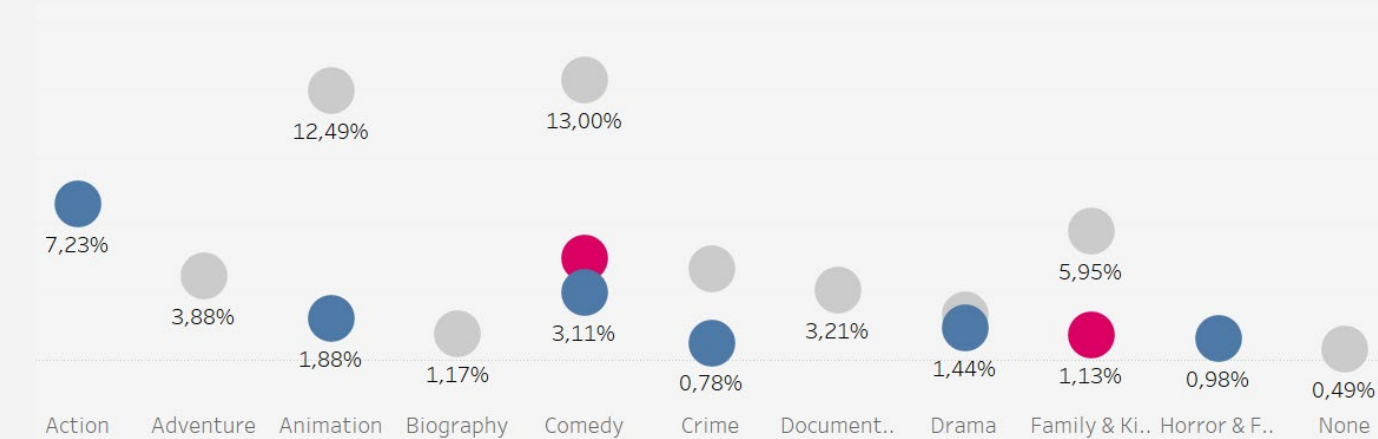
NETFLIX - AMAZON

N°	MOVIE	PLATFORM	COUNTRY	POSITION	GENRE	STREAMS
1	Paradise	Netflix	DE	2	Action	1,113,6
2	A Man Called Otto	Amazon	SE	4	Comedy	667,4
3	John Wick: Chapter 4	Amazon	DE	5	Action	655,2
4	Ladybug and Cat Noir: Aw...	Netflix	FR	6	Animation	597,9
5	So Tutto di Te	Amazon	IT	8	Family & Kids	359,5
6	Squared Love Everlasting	Netflix	PO	14	Comedy	319,2
7	Killer Book Club	Netflix	ES	15	Horror & Fantasy	311,6
8	Around the World in 80 D...	Netflix	IE	18	Action	285,9
9	La straordinaria scoperta	Netflix	IT	21	Comedy	267,8
10	Culpa mía	Amazon	ES	10	Drama	259,9
11	Do You Know Claudia?	Netflix	IT	24	Comedy	256,0
12	Everybody Knows	Amazon	ES	11	Crime	246,8
13	L'ultima cena	Netflix	IT	27	Comedy	243,7
14	Soulcatcher	Netflix	PO	28	Action	240,1
15	L'estate più calda	Amazon	IT	12	Comedy	212,6

SHOWING 15 | 19 - [See complete chart here](#)

CONTRIBUTION OF LOCAL & EUROPEAN SHOWS TO TOTAL STREAMS

NETFLIX - AMAZON

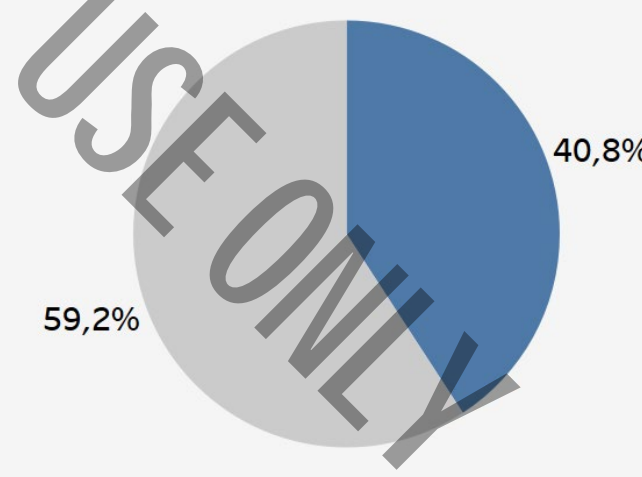


NUMBER OF TITLES BY GENRES

NETFLIX - AMAZON

GENRE	EU	ITALY
Action	4	
Animation	1	
Comedy	2	7
Crime	1	
Drama	2	
Family & Kids		1
Horror & Fantasy	1	

CONTRIBUTION TO DRAMA STREAMS



PRODUCTION COUNTRIES | EUROPE | ITALY | OTHERS

ITALIAN CONTENT FACES A SHARP DECLINE IN EUROPEAN CHARTS

The domestic streaming scene observed a stark downturn in Italian content. From a dominant position at 44% in July, Italian productions suffered a sharp decline, settling at a mere 21% this month in terms of European share. Their once-prominent role has now faded, landing them in a humbling fourth place in the Production Country list. While the comedy genre saw Italy contribute a modest 1.5M streams, the film "So Tutto di Te" stood out, securing the #22 spot and amassing 359K streams exclusively on Amazon Prime Video.

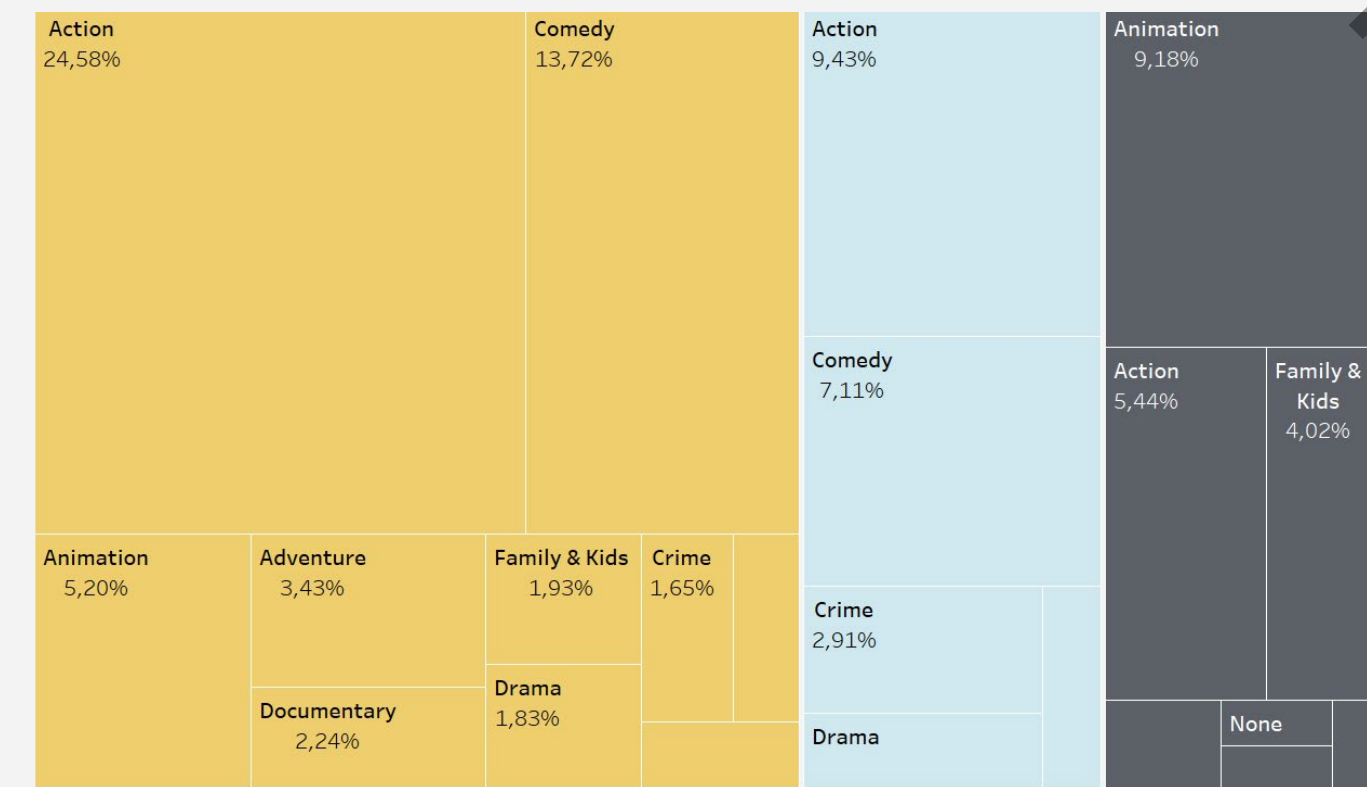
EUROPEAN PRODUCTIONS LEAD YET WEAKEN IN INFLUENCE

Consistently topping the charts for four consecutive months, European productions hold their lead with a collective 4.8M streams. However, mirroring the decline seen in Italian content, their dominance too is waning. The German production, "Paradise," emerged as a beacon with 1.1M streams. Meanwhile, the Polish film "Squared Love Everlasting" — the third instalment of the homonymous series — earned a commendable 14th position in the rankings. Notably, the Spanish thriller "Killer Book Club" intrigued Italian viewers, racking up 311K streams. Available on Netflix, this Horror flick cleverly draws on the nostalgic essence of B-movies, echoing classics like "Final Destination" and "I Know What They Did Last Summer".

ITALY | 100 SHOWS | SVOD PLATFORMS

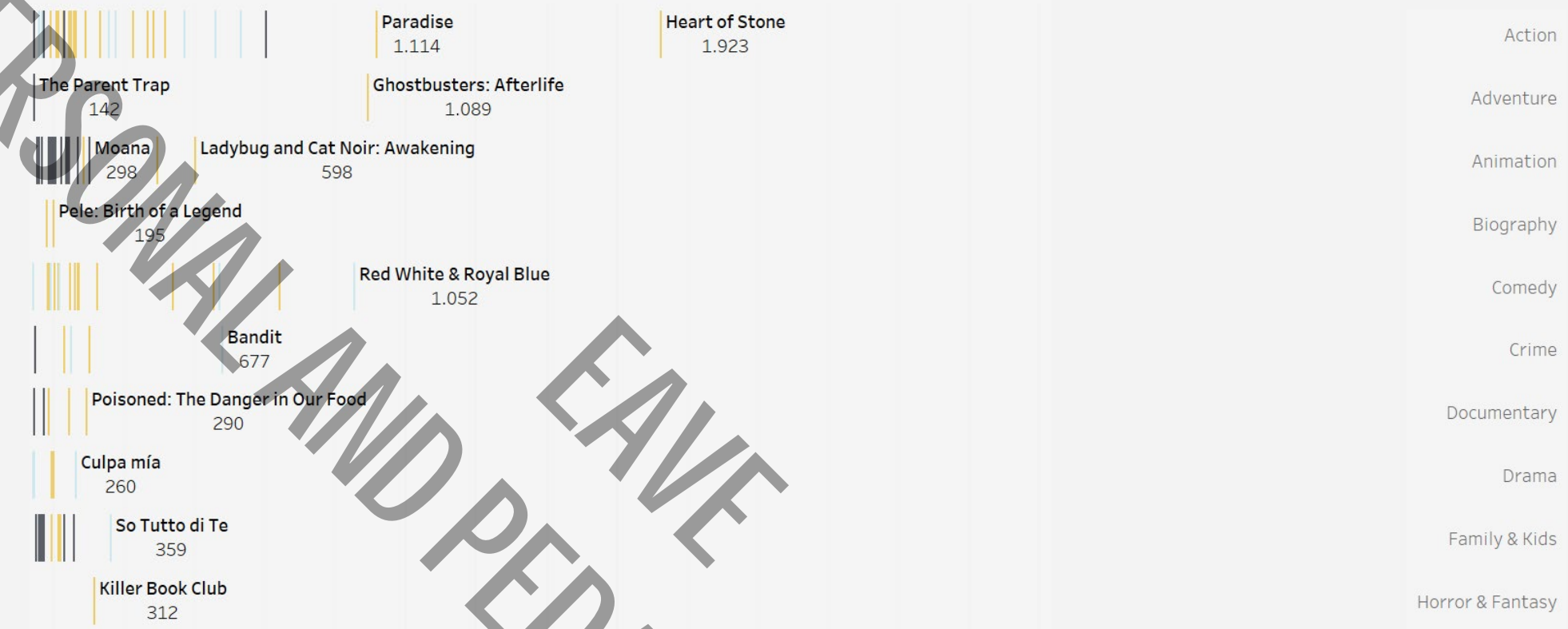
MOST WATCHED GENRES

SHARE BY PLATFORM

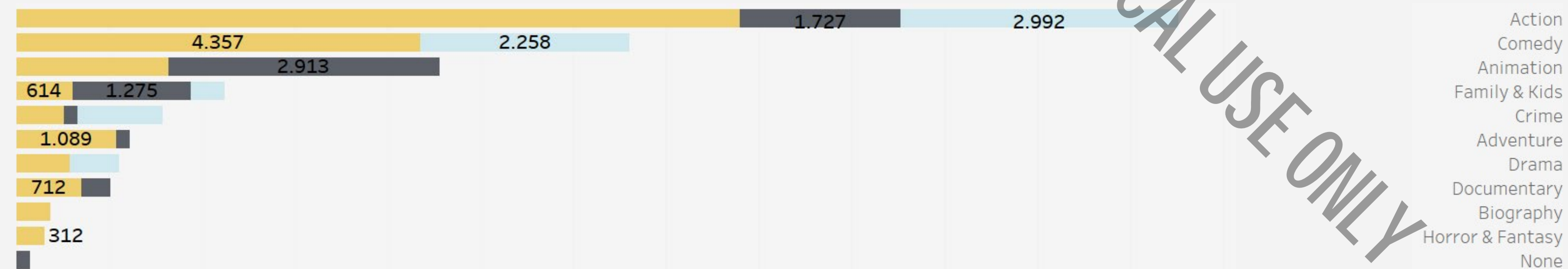


TOTAL STREAMS BY GENRES

PLATFORM COMPARATIVE



TOP SHOWS STREAMS BY GENRES



OTT | AMAZON | NETFLIX | DISNEY

DISNEY+ RISES, CHALLENGING NETFLIX AND ALIGNING WITH AMAZON'S INFLUENCE

Disney+ continues to fortify its foothold in Italy, its toughest market amongst the analysed ones, now mirroring Amazon Prime Video's viewership at a formidable 21%. Since April, Netflix has been treading on thin ice, with May witnessing its most significant plunge. As of this month, the streaming titan notched its lowest performance to date in our records. The drop will correspond to the registration to shared accounts outside the same household that started ruling in Italy in May. Disney+ showcases its competitive edge with the "Guardians of The Galaxy" collection, amassing an impressive 1.7M streams. However, its true strength shines in the Animation and Kids genres, anchored by perennial favourites such as "Moana", "Frozen", and other universally acclaimed titles.

However, Netflix still manages to retain viewers, thanks to its Action content which accounts for a robust 25% of its viewership. While most top-tier titles are streamed on Netflix, it falls short in the Comedy, Crime, Drama, and Family & Kids genres. Here, Amazon Prime Video is carving out a distinct space for itself. Signifying this shift is the LGBTQ+ romantic comedy, "Red, White & Royal Blue" from Amazon MGM Studios, which made waves on the charts, pulling in a remarkable 1M streams. Inspired by Casey McQuiston's 2019 novel, this film, helmed by debut director Matthey Lopez, had its grand premiere at the BFI IMAX in London in July and graced the streaming platform shortly after.

THE CRUCIAL ROLE AND POSITION OF RAI PLAY IN THE ITALIAN STREAMING WAR

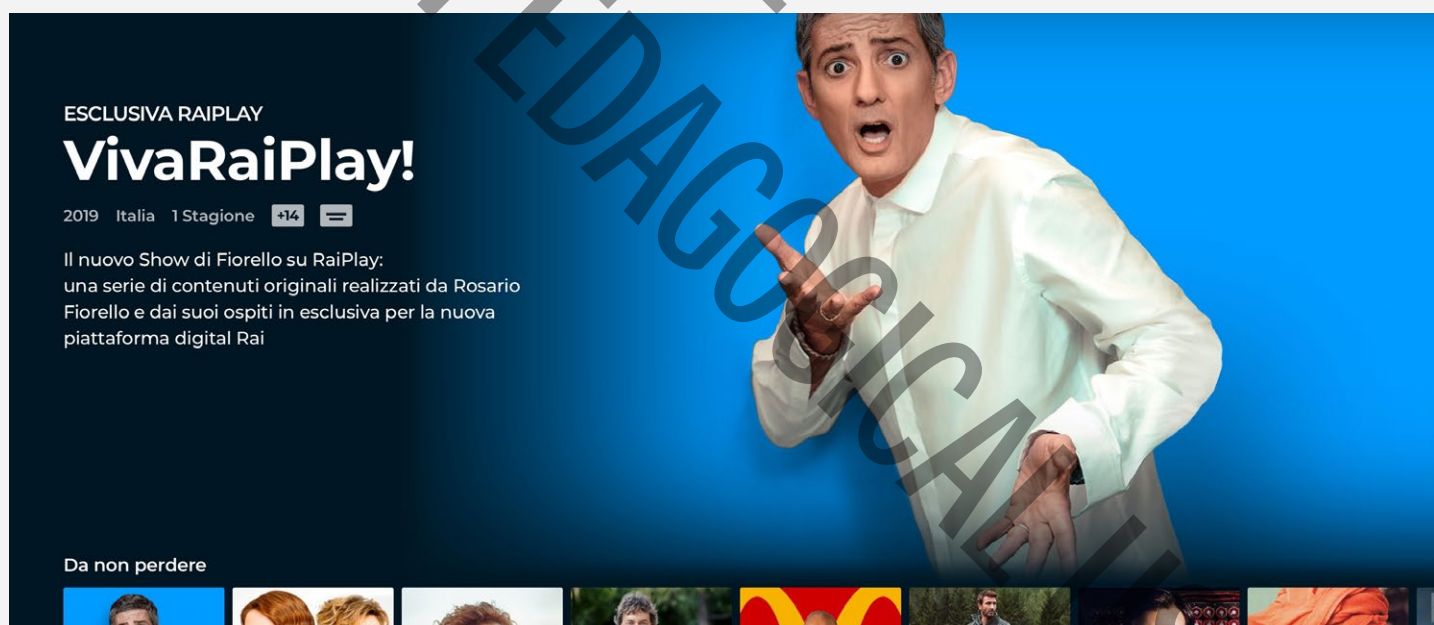
Since Disney's entry into the Think Data reports, the landscape of OTT platforms has witnessed substantial changes. In each market, the introduction of Disney+ has either intensified competition or brought about different dynamics. In Italy, it has undoubtedly ushered in a much more competitive environment.

The Current Landscape

In the film market, the battle among OTT platforms is apparent. Netflix has historically dominated, consistently capturing more than half of the Top #100 Movies. This month, Netflix holds 57% of the market share. However, Disney+ and Prime Video engage in fierce competition each month. Both platforms maintain a share that is neck-and-neck, with Prime Video usually edging out the victory. Since Disney+'s introduction, Prime Video's share has fluctuated between 14% and 22%, consistently surpassing Disney's share. Walt Disney's platform has also seen its share fluctuate between 14% and 21%, remaining extremely close. This August, Prime Video secured a 22% share, while Disney+ held 21%.

In the realm of TV shows, the Italian streaming market is experiencing a noteworthy transformation, as highlighted in the report. Netflix's dominance has been gradually eroding. This month, Netflix's market share drops to 50%, marking its lowest figure to date in the Italian market, with just 128M views. Seizing the opportunity, Disney+ secures 44% of the streams, leaving only 5% for Prime Video. This shift is undoubtedly a significant milestone for Disney+, as it comes closest ever to challenging Netflix's market position, a position Netflix has held since June 2021.

“De Maio elaborated that the programming team's guiding principle is **“Less Hollywood TV shows, more space for European content, and more support for Italian cinema”.**”



The Role of RAI in the streaming wars

But what's the role of local networks in these wars? RAI, the Italian public broadcaster, plays a substantial part in both the film and TV show streaming markets. Adriano De Maio, a veteran RAI executive, recently discussed the unstoppable disruption caused by digital and streaming in Italy's TV landscape. He emphasised RAI's strategy to compete in this evolving landscape, aiming to provide more cultural enrichment and cater to the



LOLA RODRÍGUEZ
DATA SPECIALIST

youth demographic that drives traffic on RAI Play, a platform boasting over 23M subscribers, surpassing Netflix's Italian customer base by a significant margin.

De Maio elaborated that the programming team's guiding principle is “Less Hollywood TV shows, more space for European content, and more support for Italian cinema”. He stressed the need to align with audience preferences while maintaining a balance between U.S. and European content. French series such as “Haut Potentiel Intellectuel” have found success on RAI-1, along with French-Belgian miniseries like “Jugée coupable” and “Enquête à cœur ouvert,” demonstrating the strong appeal of inter-European content.

This not only aligns with audience preferences but also suits budget constraints resulting from government-mandated licence fee reductions. RAI's focus extends to finding new series and appealing to the youth demographic by developing content with young protagonists, constructive storylines, biographical pieces, female-audience-focused melodramas, and U.S. action movies for RAI 2. With numerous slots to fill, RAI seeks a diverse array of content to engage its audience.

In this evolving landscape, RAI, the Italian public broadcaster, is taking proactive steps to remain a significant player by adapting its content strategy to cater to both cultural enrichment and the youth demographic. As the streaming wars continue to evolve in Italy, the role of RAI will be instrumental in shaping the future of streaming in the country. Could RAI really stand this past of time in the times of the streaming war?

FRANCE | 100 MOVIES | OVERVIEW

TOTAL STREAMS BY MOVIE

NETFLIX - AMAZON

Nº	MOVIE	PLATFORM	GENRE	STREAMS
1	Heart of Stone	Netflix	Action	4.938
2	What Men Want	Netflix	Comedy	2.859
3	Paradise	Netflix	Action	2.245
4	(Girl)Friend	Netflix	Comedy	1.769
5	Don't Breathe 2	Netflix	Action	1.408
6	The Monkey King	Netflix	Animation	1.298
7	Zom100: Bucket List of th..	Netflix	Action	1.250
8	The Meg	Amazon	Action	153
9	Moonfall	Netflix	Action	1.095
10	Snafu	Amazon	Action	1.128
11	Escape Room: Tournamen..	Netflix	Action	1.094
12	Kandahar	Amazon	Action	1.040
13	Soulcatcher	Netflix	Action	1.014
14	Happiness for Beginners	Netflix	Comedy	952
15	The Bad Guys	Netflix	Animation	895
16	Blacklight	Amazon	Action	888
17	Killer Book Club	Netflix	Horror & Fantasy	886
18	Red White & Royal Blue	Amazon	Comedy	879
19	Les têtes de l'emploi	Netflix	Comedy	859
20	You Are SO Not Invited to ..	Netflix	Comedy	785
21	Alice	Netflix	Drama	698
22	Tenet	Netflix	Action	665
23	Uncharted	Amazon	Action	664
24	Culpa mía	Amazon	Drama	647
25	Sing 2	Netflix	Animation	637
26	Kong: Skull Island	Netflix	Action	609
27	Le crocodile du Botswana	Netflix	Comedy	581
28	The Boss Baby	Netflix	Animation	538
29	The Tourist	Netflix	Action	485
30	Summer of 85	Netflix	Drama	483
31	Downton Abbey 2	Netflix	Drama	477
32	Moana	Disney+	Animation	474
33	Squared Love Everlasting	Netflix	Comedy	463
34	Robots	Amazon	Comedy	434
35	The Deepest Breath	Netflix	Documentary	427
36	A Life Too Short: The Isab..	Netflix	Documentary	420
37	Made in Italy	Netflix	Comedy	416
38	10 Days of a Bad Man	Netflix	Crime	416
39	The Chef's Wife	Netflix	Comedy	405
40	Purple Hearts	Netflix	Drama	403

SHOWING 40 | 99 - [See complete chart here](#)

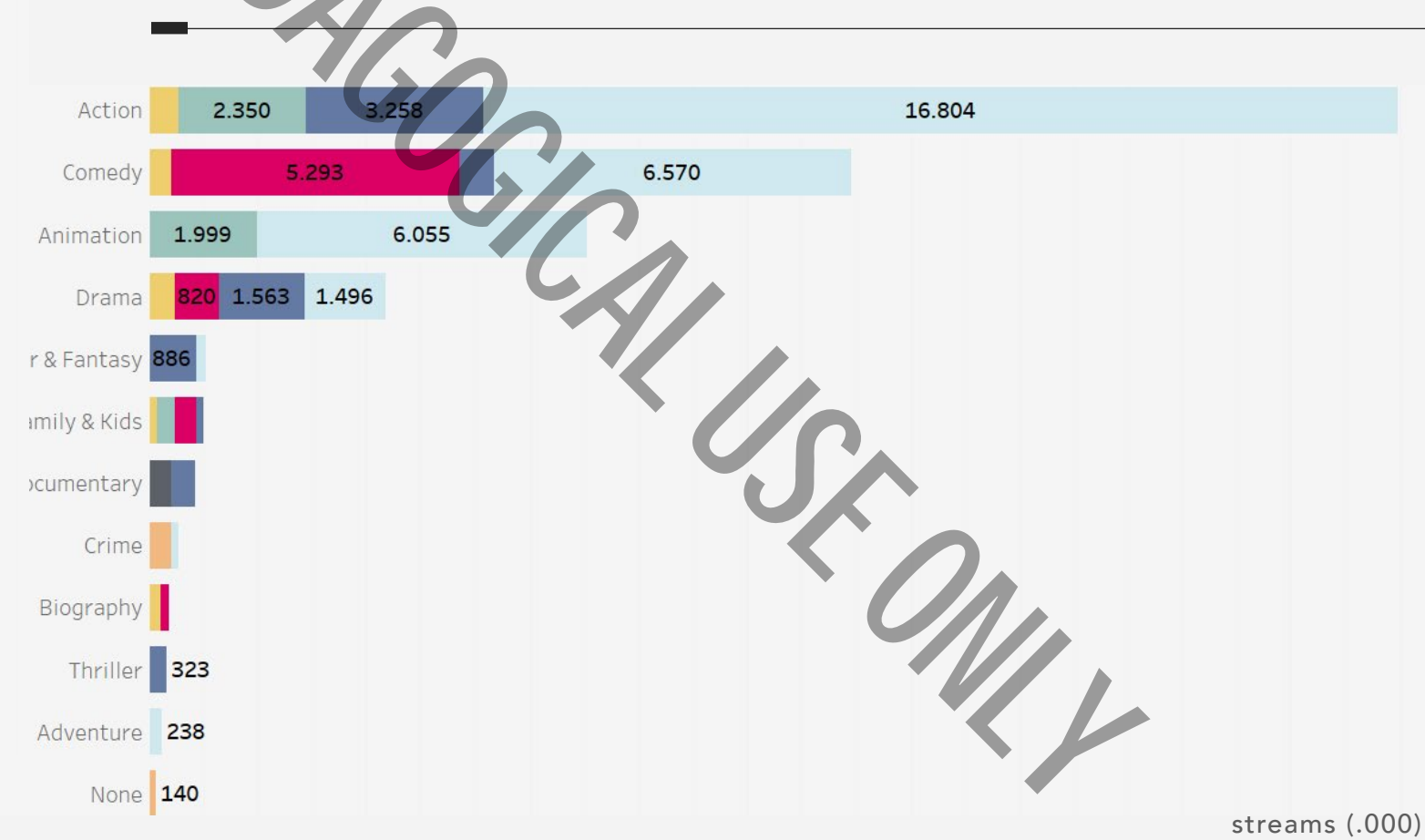
CATALOG SHARE BY COUNTRY

NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES

NETFLIX - AMAZON



streams (.000)

PRODUCTION COUNTRIES | USA & CANADA | EUROPE | FRANCE | ASIA | UK | LATAM | OTHER

THE CINEMATIC PALETTE INCLUDES ACTION, COMEDY, AND A RISING ASIAN PRESENCE

Mirroring the preferences seen in neighbouring markets, France displays a strong affinity for the Action genre, commanding a formidable 43% of the total viewership. While Comedies maintain their appeal (24%), it's the Animation sector that's turning heads, securing a 15% share. This surge is notably powered by a blend of Asian and US productions. As it is common in France, Asian features, in particular, have made a splash in the Top 10. Titles like "The Money King", "Zom100: Bucket List of The Dead", and "Snafu" have not only gained popularity but also crossed the 1M stream milestone. Other Asian animated offerings find their spots below the Top 52, hinting at the potential for growth and broader acceptance in the market.

DIVERSITY & DRAMA AT THE FOREFRONT

However, the month's noteworthy shift has been the rise of the Drama genre. Films such as "Alice", "Culpa Mía", and "Summer of 85" lead the pack in this category, each amassing over 483K streams, signalling a renewed interest in heart-touching narratives. Furthermore, when analysing the origin of content, Europe stands tall, overshadowing American contributions. A significant 42% of the top 100 dramas herald from European cinematic powerhouses. Distinctly, France's Top 100 content offers a rich tapestry of genres, reflecting a diverse cinematic taste. This versatility sets the French market apart, emphasising its appreciation for a broader spectrum of narratives compared to other regions.

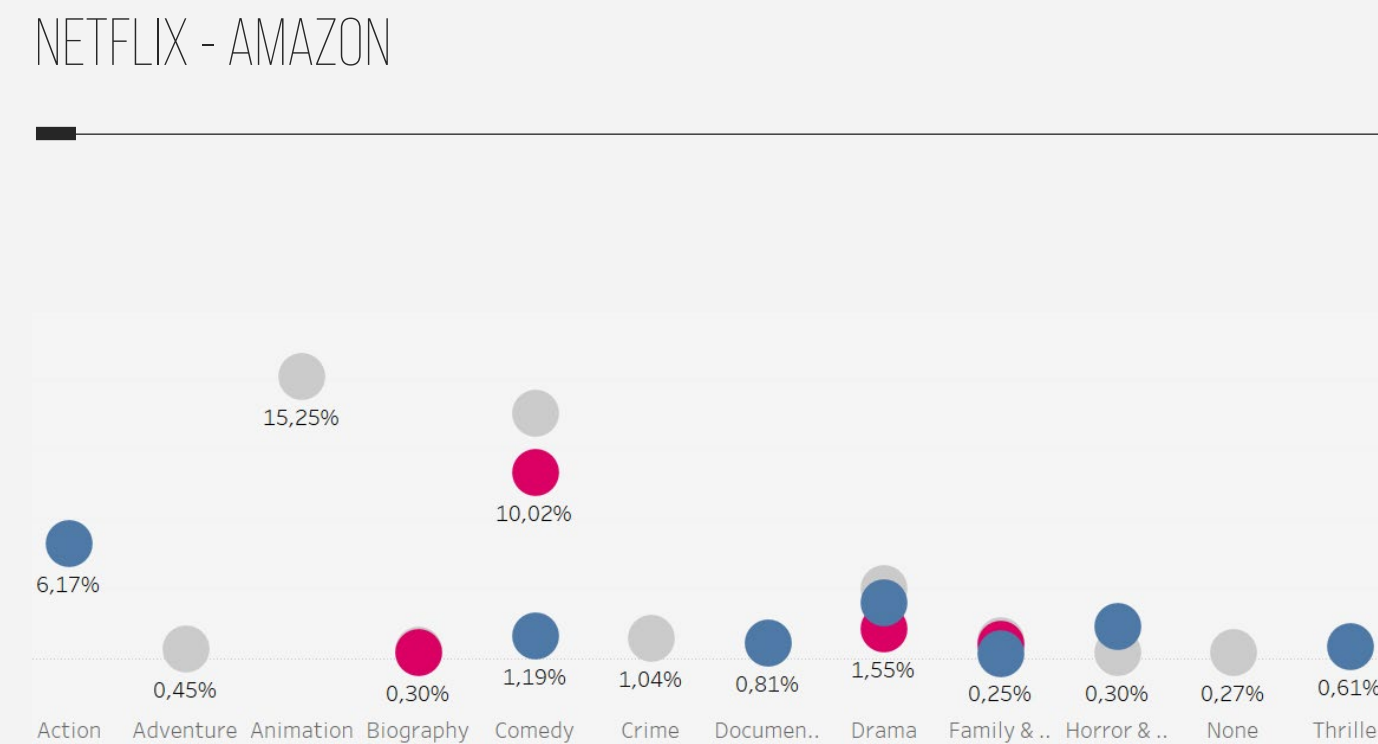
FRANCE | 100 MOVIES | EUROPEAN FOCUS

LOCAL AND EUROPEAN MOVIES IN THE TOP 100 NETFLIX - AMAZON



SHOWING 15 | 22 – [See complete chart here](#)

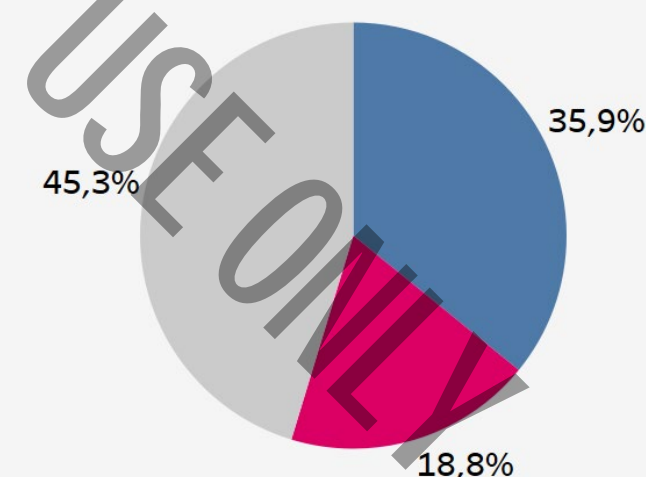
CONTRIBUTION OF LOCAL & EUROPEAN MOVIES TO TOTAL STREAMS NETFLIX - AMAZON



NUMBER OF TITLES BY GENRES NETFLIX - AMAZON

GENRE	EU	FRANCE
Action	2	
Biography		1
Comedy	2	10
Documentary	1	
Drama	5	2
Family & Kids	1	1
Horror & Fantasy	1	
Thriller	1	

CONTRIBUTION TO DRAMA STREAMS



PRODUCTION COUNTRIES | EUROPE | FRANCE | OTHERS

EUROPEAN ASCENDANCY & NETFLIX'S MAGIC TOUCH

While there's been a discernible decline in European content—from 73% to 46%—it's clear that European films continue to resonate with the masses, maintaining their position as the most-streamed content. Particularly German productions have made a particularly indelible mark, with "Paradise" setting the gold standard, amassing a commendable 2.2M streams. "Soulcatcher" surpassed 1M streams, elevating Poland's viewership to 9% within the European landscape.

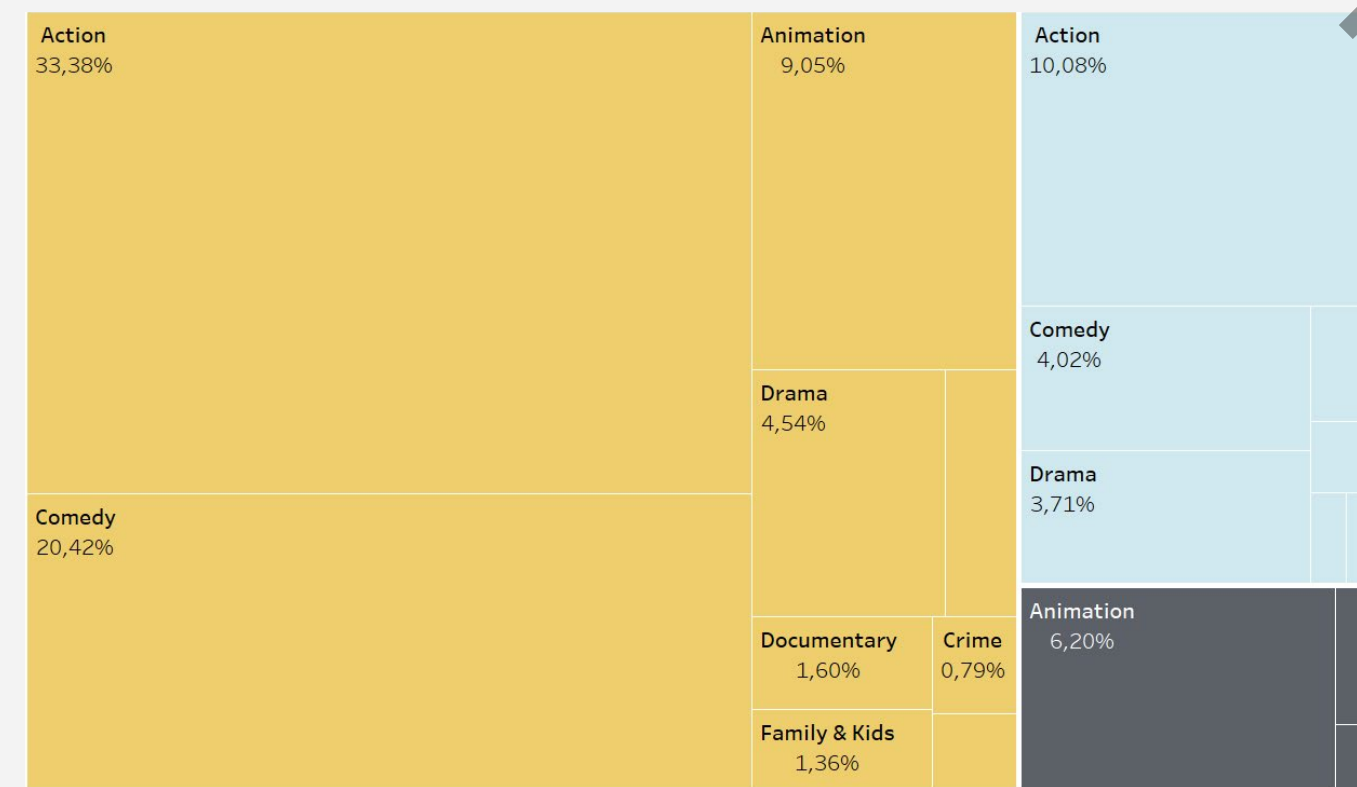
COMEDIES; CHART-TOPPERS IN LOCAL FILM STREAMING

On the homefront, local productions have carved out their niche, especially in the Comedy sector, capturing 10% of the total viewership. The 2018 film "(Girl)Friend" and "Les Têtes de l'emploi" stand as testaments to this trend. Yet, its resurgence in popularity isn't just a matter of inherent quality; it underscores Netflix's unparalleled prowess in rejuvenating older titles. By adeptly rebranding and repackaging films, Netflix gifts them a second wind, presenting them as novel experiences to the audience. The streaming giant's ability to elevate a 2018 old film to chart-topping status speaks volumes about its influence in shaping viewer preferences and trends.

FRANCE | 100 MOVIES | SVOD PLATFORMS

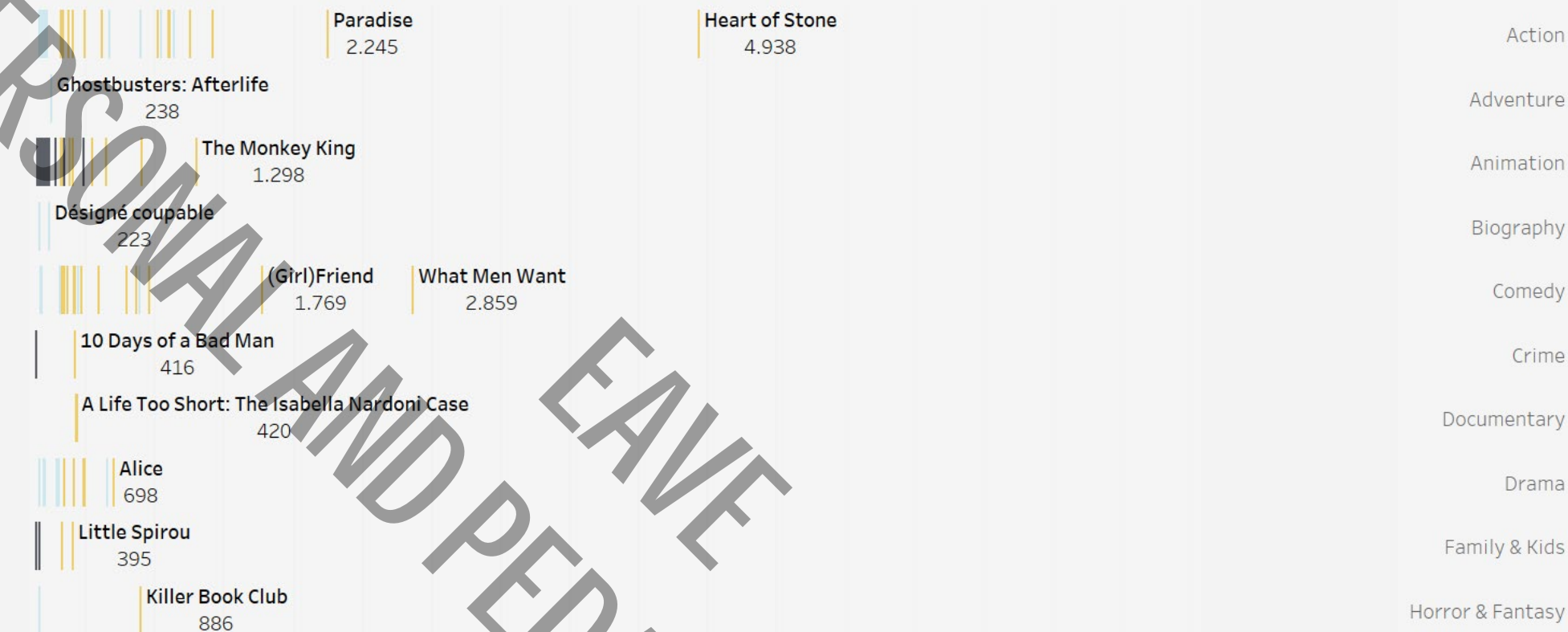
MOST WATCHED GENRES

SHARE BY PLATFORM

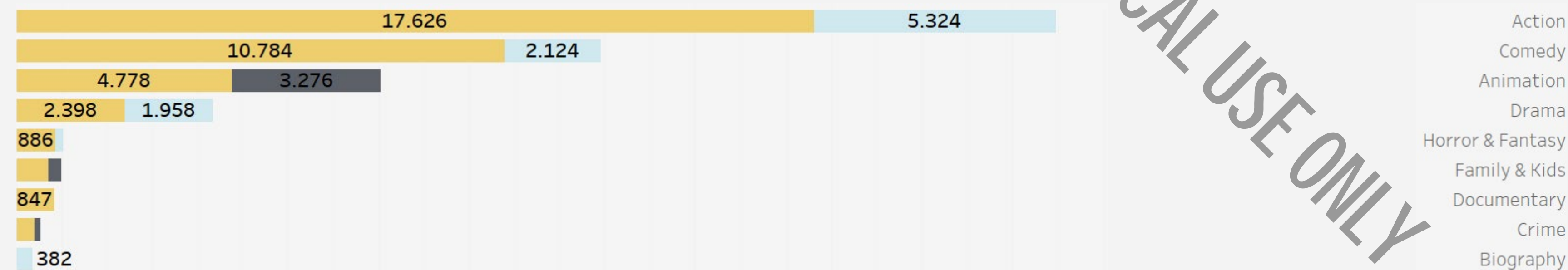


TOTAL STREAMS BY GENRES

PLATFORM COMPARATIVE



TOP MOVIE STREAMS BY GENRES



OTT | AMAZON | NETFLIX | DISNEY

AMAZON'S RISING INFLUENCE

Like in Spain, Amazon hits solid in France too. It secured nearly 20% of the market share, marking its best performance since records began. Meanwhile, Netflix's decline in France is more subtle compared to its performance in other nations surveyed. Disney+ might not be the darling of the French audience, but it maintains a consistent 7% market share, largely propelled by its Animation offerings which raked in 3.2M streams.

NETFLIX'S ACTION-PACKED DOMINANCE

Action titles reign supreme on Netflix, accounting for a staggering one-third of the Top 100 viewership. For every three movies streamed, one is an Action flick on Netflix. Topping the list are films like "Heart of Son-tone", "Paradise", "Don't Breathe 2", and the Japanese hit "Zom100: Bucket List of Dead". However, Netflix doesn't lag behind in the comedy genre either. With a whopping 10.7M streams this month, it bags 20% of the total viewership. Classics from 2018 like "What Men Want" and "(Girl)Friend" merge seamlessly with fresher offerings such as "Happiness for Beginners", showcasing the platform's diverse comedic appeal.

FRANCE | 100 SHOWS | OVERVIEW

TOTAL STREAMS BY SHOW

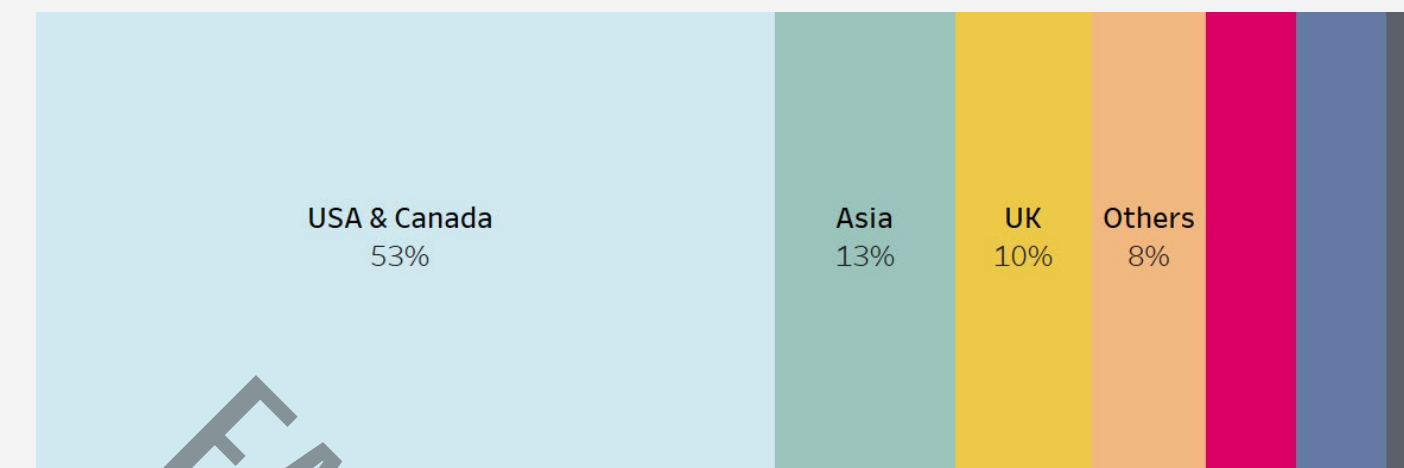
NETFLIX - AMAZON

Nº	MOVIE	PLATFORM	GENRE	STREAMS
1	Young Sheldon	Netflix	Family & Kids	27.431
2	Heartstopper	Netflix	Family & Kids	15.790
3	Naruto: Shippūden	Netflix	Animation	15.680
4	The Big Bang Theory	Amazon	Comedy	1.725
		Netflix	Comedy	13.141
5	Bluey	Disney+	Family & Kids	14.030
6	Gossip Girl	Netflix	Family & Kids	12.812
7	Malcolm in the Middle	Disney+	Family & Kids	12.712
8	The Lincoln Lawyer	Netflix	Drama	10.961
9	Baki Hanma	Netflix	Animation	10.766
10	PAW Patrol	Netflix	Family & Kids	10.116
11	Painkiller	Netflix	Drama	9.138
12	The Witcher	Netflix	Drama	8.458
13	Grey's Anatomy	Disney+	Comedy	8.073
14	Who Is Erin Carter?	Netflix	Action	8.061
15	The Smurfs	Netflix	Family & Kids	7.679
16	Grizzly and the Lemmings	Netflix	Family & Kids	7.499
17	Un cuento perfecto	Netflix	Comedy	6.789
18	The Summer I Turned Pret...	Amazon	Drama	6.404
19	Ragnarok	Netflix	Drama	6.081
20	Brooklyn Nine-Nine	Netflix	Comedy	5.553
21	Bleach	Disney+	Animation	5.530
22	Les Sisters	Netflix	Family & Kids	5.509
23	Boy Girl Dog Cat Mouse C..	Netflix	Family & Kids	5.378
24	Hunter x Hunter	Netflix	Animation	5.347
25	Fatal Seduction	Netflix	Drama	5.281
26	The Mentalist	Amazon	Drama	5.168
27	Jessie	Disney+	Family & Kids	5.144
28	K.C. Undercover	Disney+	Family & Kids	5.016
29	Sweet Magnolias	Netflix	Drama	4.939
30	The Simpsons	Disney+	Animation	4.853
31	My Happy Marriage	Netflix	Drama	4.779
32	Cruel Summer	Amazon	Drama	4.748
33	The Vampire Diaries	Amazon	Family & Kids	4.718
34	The Chosen One	Netflix	Comedy	4.566
35	Mask Girl	Netflix	Comedy	4.232
36	Spidey and His Amazing F..	Disney+	Family & Kids	4.190
37	Nate Is Late	Netflix	Family & Kids	3.686
38	9-1-1: Lone Star	Disney+	Drama	3.621
39	The Bear	Disney+	Drama	3.604
40	Zig & Sharko	Netflix	Family & Kids	3.598

SHOWING 40 | 62 - [See complete chart here](#)

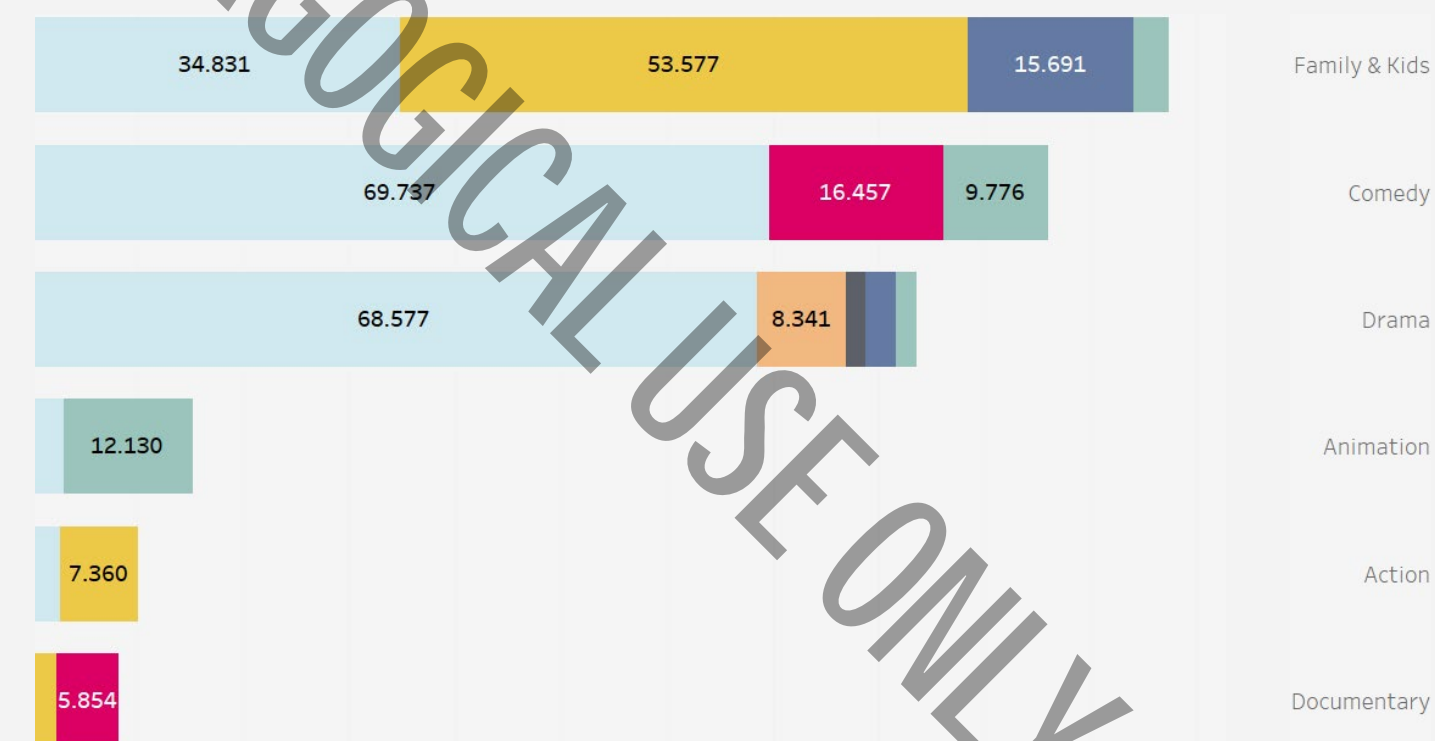
CATALOG SHARE BY COUNTRY

NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES

NETFLIX - AMAZON



streams (.000)

PRODUCTION COUNTRIES | USA & CANADA | EUROPE | FRANCE | ASIA | UK | LATAM | OTHER

UPS AND DOWNS IN THE FRENCH MARKET: A ROLLERCOASTER YEAR

This month in the French market, we're seeing a decline. However, it hasn't been a consistent trend: throughout 2023, the French market has been on a constant rollercoaster. It hasn't been able to increase its streams for more than a month or decrease them, creating a sense of instability in the market. Currently, with 372M streams, the French market is in one of its worst positions in 2023, although still far from the overall data since June 2021.

FAMILY & KIDS WINNING OVER THE AUDIENCE THIS MONTH

Without a doubt, the Family & Kids category takes the crown as the most-watched this month, with a 40% share, doubling the Drama genre and tripling the Comedy genre. "Young Sheldon" (27.4M) "Naruto: Shippuden" (15.6M) "Bluey" (14M) "Malcolm in the Middle" (12.7M) and others are the culprits. It makes perfect sense. What else to do with the kids while the parents are on vacation?

FRANCE | 100 SHOWS | EUROPEAN FOCUS

LOCAL AND EUROPEAN SHOWS IN THE TOP 100

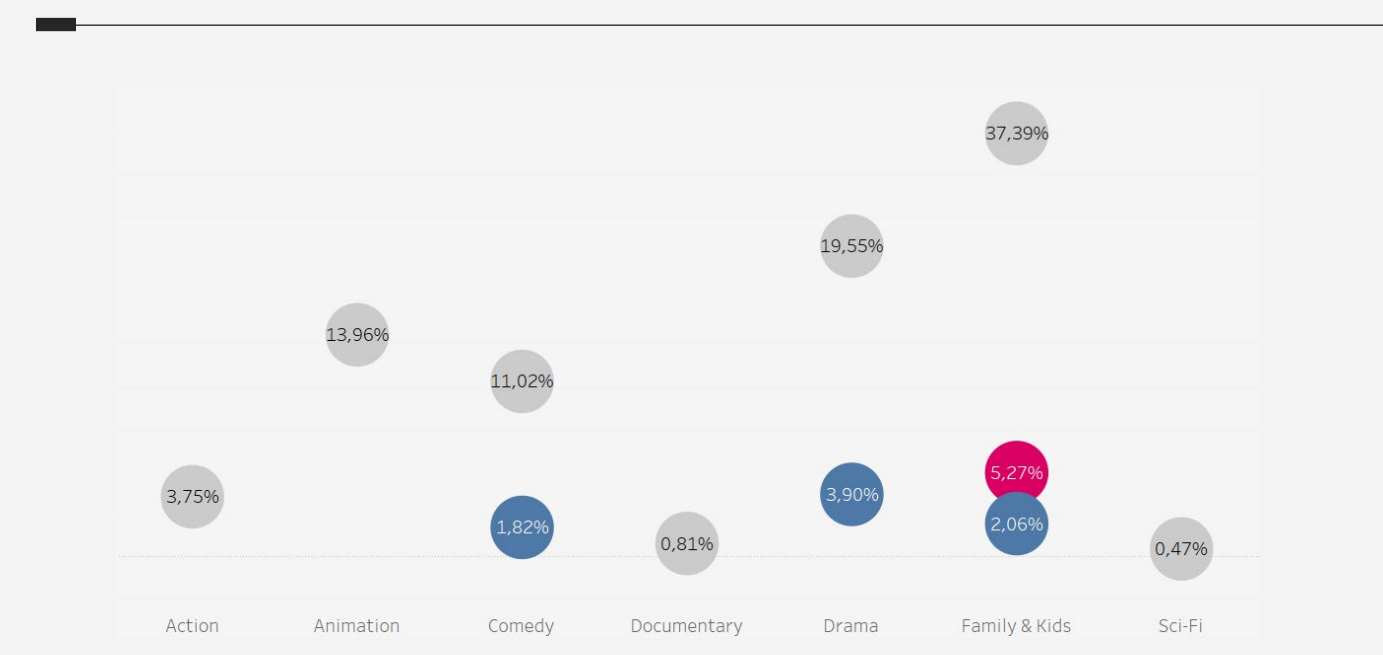
NETFLIX - AMAZON

N°	MOVIE	SEASON	PLATFORM	COUNTRY	POSITION	GENRE	STREAMS
1	The Witcher	3	Netflix	PO	5	Drama	8.458
2	The Smurfs	1	Netflix	BE	9	Family & Kids	7.679
3	Grizzy and the Lemmings	2	Netflix	FR	25	Family & Kids	4.542
4	Un cuento perfecto	1	Netflix	ES	11	Comedy	6.789
5	Ragnarok	3	Netflix	DK	13	Drama	6.081
6	Les Sisters	1	Netflix	FR	17	Family & Kids	5.509
7	Zig & Sharko	3	Netflix	FR	30	Family & Kids	3.598
8	Miraculous: Tales of Lady..	1	Netflix	FR	40	Family & Kids	3.052

SHOWING 8 | 8 - [See complete chart here](#)

CONTRIBUTION OF LOCAL & EUROPEAN SHOWS TO TOTAL STREAMS

NETFLIX - AMAZON

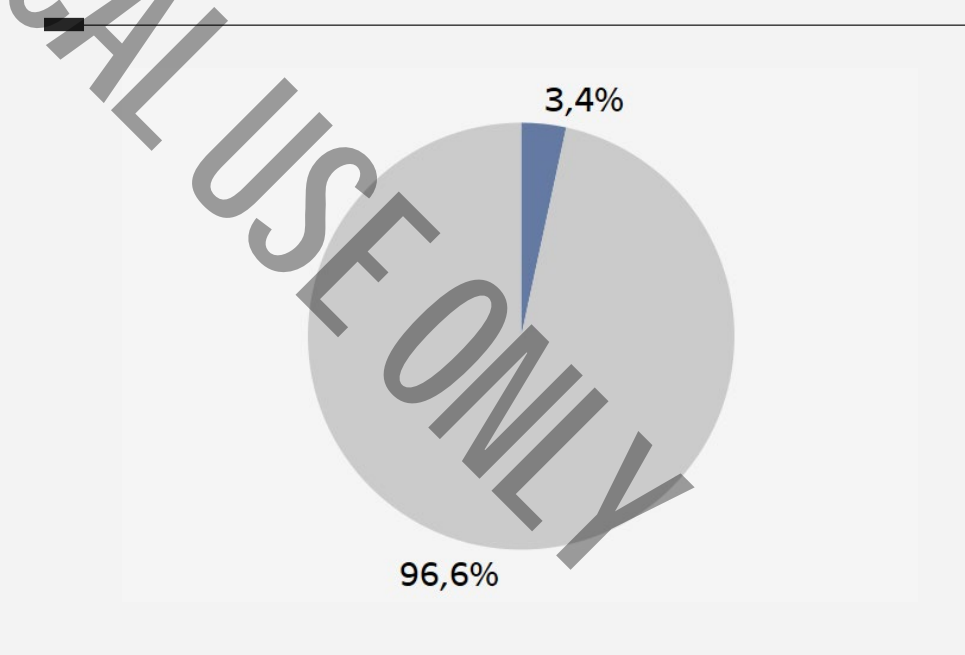


NUMBER OF TITLES BY GENRES

NETFLIX - AMAZON

Genre	EU	FRANCE
Comedy	1	1
Drama	2	2
Family & Kids	4	1

CONTRIBUTION TO DRAMA STREAMS



PRODUCTION COUNTRIES | EUROPE | FRANCE | OTHERS

EUROPEAN RESURGENCE BUT LOCAL SHOWS KEEP IT LOW

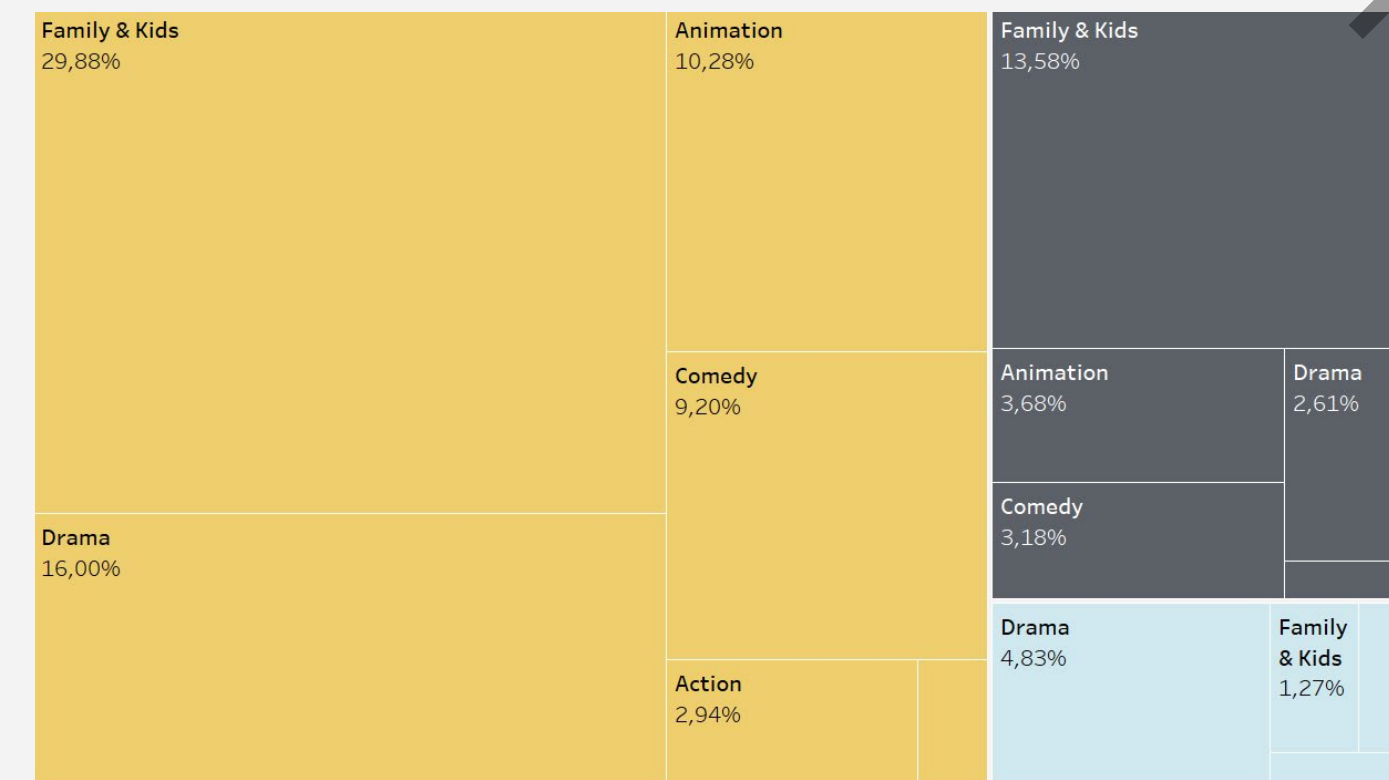
American productions took a hit this month, losing almost 10% of their share, hitting a low point we don't see as often as we'd like. This plays in favour of the true star this month: the UK, which, thanks to "Heartstopper", "Who is Erin Carter" and "Boy Girl Dog Cat Mouse Cheese" secures a 10% share.

Talking about local productions, France finds itself with a 5.3% share this month thanks to "The Witcher" and "The Smurfs", a figure that has been steadily plummeting since March 2023 when France reached one of its market peaks with the release of the latest season of "LOL, qui rit, sort!" on Amazon. On the other hand, it seems that European productions are improving their share a bit. This month, they occupy 3.7% of the share. We haven't seen a similar figure since the beginning of the year in January 2023 when "Sky Rojo" and "Totenfrau" made their debut on the lists. This month, these numbers were achieved thanks to classics like "Grizzy and the Lemmings" (7.5M), "Les Sisters (5.5M)", "Zig & Sharko" (3.5M) and "Miraculous: Tales of Ladybug & Cat Noir" (3M).

FRANCE | 100 SHOWS | SVOD PLATFORMS

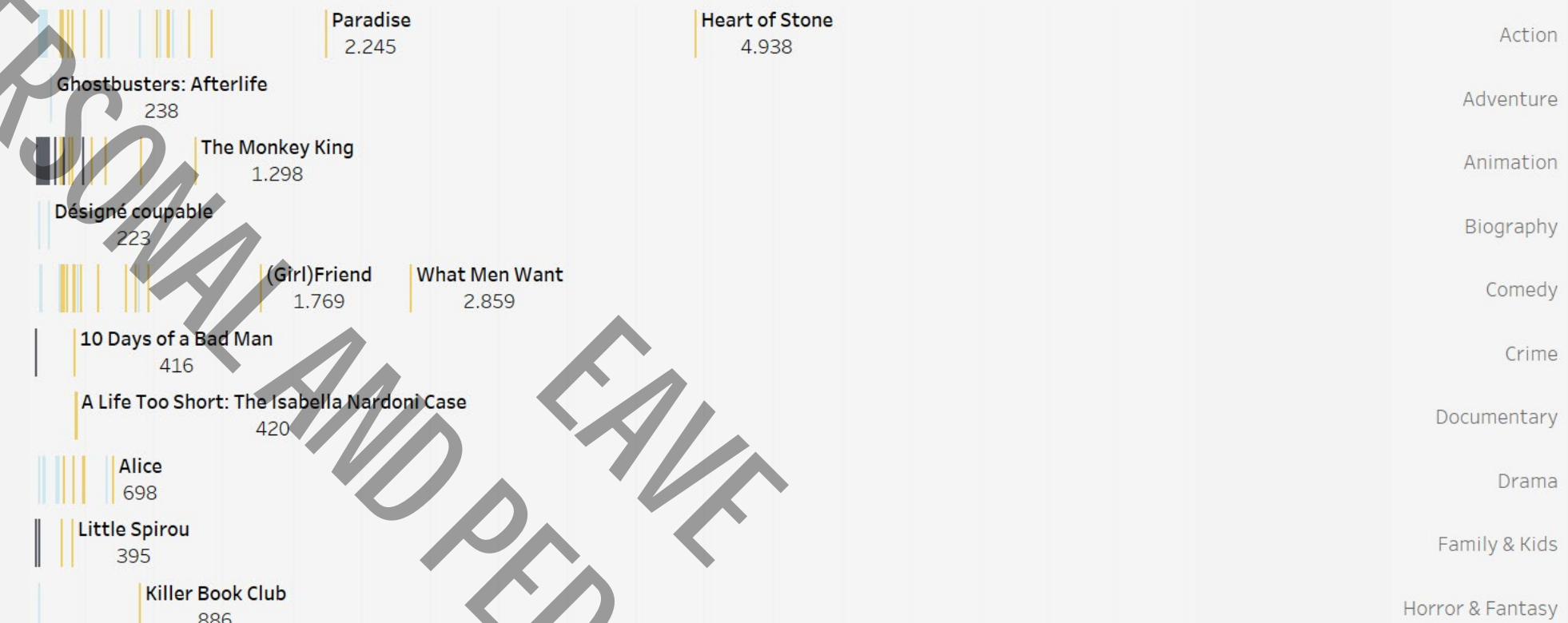
MOST WATCHED GENRES

SHARE BY PLATFORM

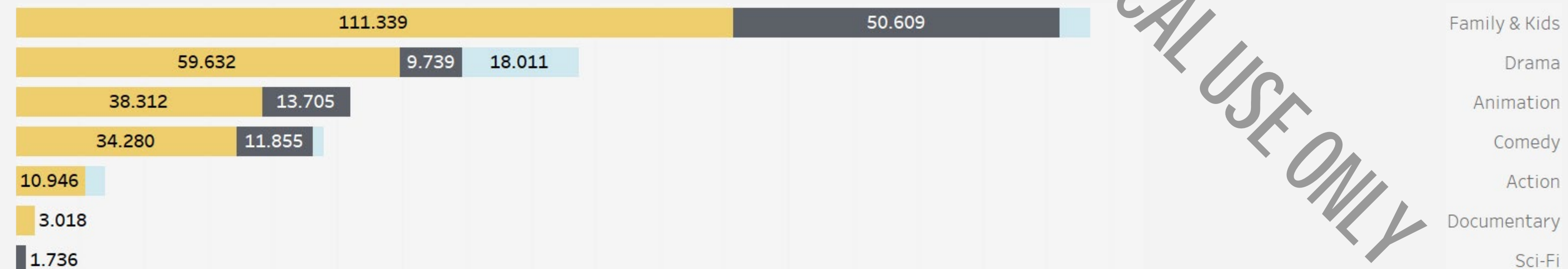


TOTAL STREAMS BY GENRES

PLATFORM COMPARATIVE



TOP SHOWS STREAMS BY GENRES



OTT | AMAZON | NETFLIX | DISNEY

PRIME VIDEO HAS ITS LIL' COMEBACK

As we're seeing almost universally in the series market, Prime Video is lifting its head a bit, capturing nearly 7.4% of the share thanks to audience-favourite IPs like "The Big Bang Theory" and the second season of "The Summer I Turned Pretty," the novel-trilogy show of the same name, which is certainly proving to be quite profitable for the company. On the other hand, Disney+ experiences a slight drop in streams, just like Netflix. However, due to the overall decrease in streams in the Top #100, this even gives Netflix a larger market share, placing it at 70% of the total streams.

BEHIND THE SCENES OF FRENCH UNEMPLOYMENT: “LES TÊTES DE L’EMPLOI” ON NETFLIX

An alternating montage shows people in job interviews, a president promising to reduce unemployment and people demonstrating in the streets. This is the beginning of this film that delves into the world of work.

“Les Têtes de l’Emploi” is a 90-minute French comedy directed by Alexandre Charlot and Franck Magnier, which had its theatrical release in November 2016. At that time, the film grossed \$3.4 million at the domestic box office. In August, it remained in the top 10 on Netflix France for a week and accumulated 859K views throughout the month.

The directors also wrote the screenplay for “Bienvenue chez les Ch’tis” (2008) and, along with Myriam Vinocour, directed the series “Marianne,” which premiered in September 2022 on France 2. The series was available on the French platform SALTO, owned by France Télévisions, TF1, and M6. In February 2023, these leading networks took the decision to terminate the online streaming service due to the furious competition generated by Netflix and Prime Video in the French market.

The story centers on a state recruitment office at risk of closing due to successful employment rates, leading to potential unemployment for its staff. The narrative follows three central characters: Cathy, a hardworking single mother juggling work and family; Thierry, an optimistic employee facing personal struggles; and Stéphane, a disgruntled bureaucrat disconnected from the plight of the jobless and his family. As the office’s closure looms, the trio concoct a scheme to create artificial unemployment to save their jobs.

“*The film satirises the public administration and bureaucracy, while addressing issues such as racism, power, inclusion, and values like family and friendship.*”



JULIANA SCHWINDT
AUDIOVISUAL STRATEGIST

The film incorporates many of the characteristic elements of French comedies: sophisticated humour, eccentric characters, addressing current social issues like unemployment and inclusion, and exploring interpersonal relationships. However, it maintains that melancholic tone in which the characters undergo transformation and become better individuals.

Stéphane, Cathy, and Thierry select 10 people who, under a more conservative perspective, might not have been considered the most suitable candidates for the positions they are about to fill during the factory’s opening: a transgender woman, a man with anger management issues, a young man with a stutter, and a migrant. The idea is for the factory to request their services once again for a new selection process. However, things take an unexpected turn: the factory owner is thrilled with the new employees and views it as an innovative and inclusive proposal, a model to be emulated within the French industry. The plan doesn’t achieve the desired outcome for our protagonists, but it results in 10 people finding employment.

The film satirises the public administration and bureaucracy, while addressing issues such as racism, power, inclusion, and values like family and friendship.

Why is it now successfully premiering on Netflix? Perhaps because these themes are more relevant than ever, perhaps due to the release of exhibition rights, or maybe because the main actors remain popular among the French audience. Additionally, French comedies are productions that viewers return to time and time again.

UK | 100 MOVIES | OVERVIEW

TOTAL STREAMS BY MOVIE

NETFLIX - AMAZON

Nº	MOVIE	PLATFORM	GENRE	STREAMS
1	Heart of Stone	Netflix	Action	4.290
2	Ghostbusters: Afterlife	Netflix	Adventure	2.124
3	Snafu	Netflix	Action	2.010
4	Kandahar	Amazon	Action	1.963
5	Bull	Netflix	Crime	1.682
6	You Are SO Not Invited to ..	Netflix	Comedy	1.588
7	Happiness for Beginners	Netflix	Comedy	1.541
8	Missing: The Lucie Blackm..	Netflix	Documentary	1.303
9	Ladybug and Cat Noir: Aw..	Netflix	Animation	1.276
10	Paradise	Netflix	Action	1.209
11	T.I.M.	Netflix	Sci-Fi	1.138
12	The Founder	Netflix	Biography	1.134
13	Matilda	Netflix	Family & Kids	1.129
14	The Monkey King	Netflix	Animation	1.071
15	Poisoned: The Danger in O..	Netflix	Documentary	1.059
16	Jurassic World: Fallen Kin..	Netflix	Action	1.033
17	Red White & Royal Blue	Amazon	Comedy	983
18	The Deepest Breath	Netflix	Documentary	968
19	Guardians of the Galaxy V..	Disney+	Action	923
20	Venom: Let There Be Carn..	Netflix	Action	910
21	Spider-Man: Into the Spid..	Netflix	Animation	886
22	Tenet	Netflix	Action	879
23	Harry Potter and the Sorc..	Netflix	Family & Kids	853
24	Son of Bigfoot	Netflix	Animation	835
25	The Stepfather	Netflix	Thriller	785
26	Zom100: Bucket List of th..	Netflix	Action	767
27	Harry Potter and the Cha..	Netflix	Family & Kids	765
28	Cop Shop	Netflix	Action	746
29	Extraction 2	Netflix	Action	731
30	Red	Amazon	Drama	707
31	Paw Patrol: The Movie	Netflix	Animation	702
32	What's Love Got to Do wit..	Netflix	Comedy	675
33	A Life Too Short: The Isab..	Netflix	Documentary	675
34	Sing	Netflix	Family & Kids	654
35	The Outlaws	Netflix	Action	625
36	Harry Potter and the Pris..	Netflix	Family & Kids	624
37	Untold: Jake Paul the Pro..	Netflix	Documentary	602
38	Harry Potter and the Gobl..	Netflix	Family & Kids	602
39	Dear Evan Hansen	Netflix	None	594
40	Game of Death	Netflix	Action	569

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

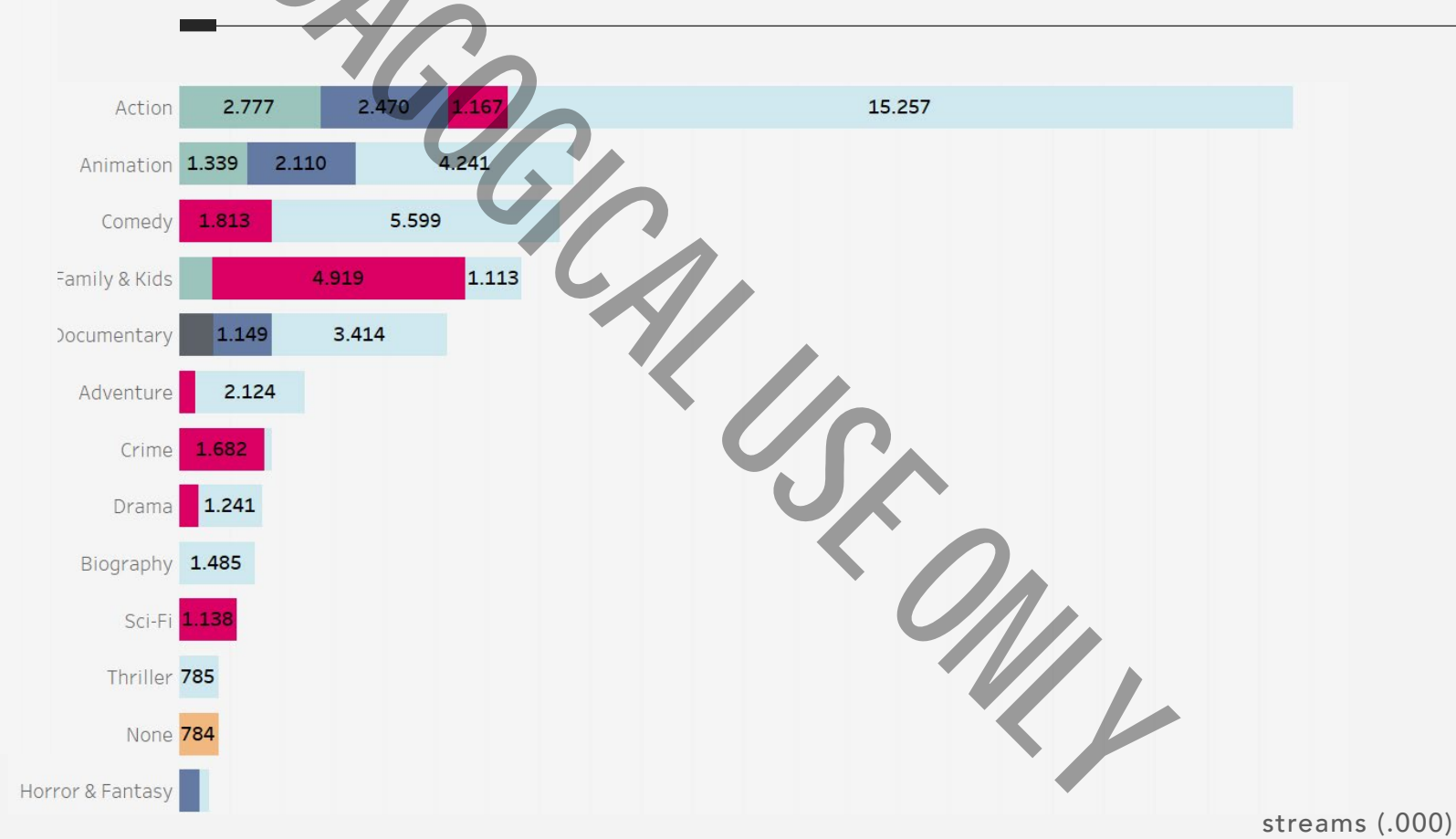
CATALOG SHARE BY COUNTRY

NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES

NETFLIX - AMAZON



streams (.000)

PRODUCTION COUNTRIES | USA & CANADA | EUROPE | UK | ASIA | LATAM | OTHER

THE PRECIPITOUS DECLINE OF FAMILY & KIDS CONTENT

Family & Kids genre, once a stalwart in the viewership landscape, experienced a sharp decline of 63% this month, garnering just 11% of the viewing quota. Despite being nudged out by both Animation and Comedy genres, which hover around a 13% share, Animation slightly edges out with an additional 200K streams. Spearheading the Animation genre is the Chinese-US co-production, "The Monkey King," which takes a close second to the beloved French animation, "Ladybug and Cat Noir." Meanwhile, the darkly captivating revenge Thriller, "Bull," has amassed an impressive 1.6M streams on Netflix, making it a standout in a Top 5 list dominated by action films.

TRUE-CRIME DOCUMENTARIES: CARVING A NICHE IN VIEWERSHIP

In recent months, the popularity of Family content has shown significant volatility, probably caused by different holiday periods. After reaching a pinnacle in December with a whopping 36M streams in a single month, the genre has oscillated between prominence and decline. Meanwhile, Documentaries carve a niche for themselves, securing a 9% share. True crime features prominently in this category, highlighting gripping stories like the investigation surrounding Lucie Blackman and the heart-wrenching case of the 5-year-old tragedy, Isabella Nardoni.

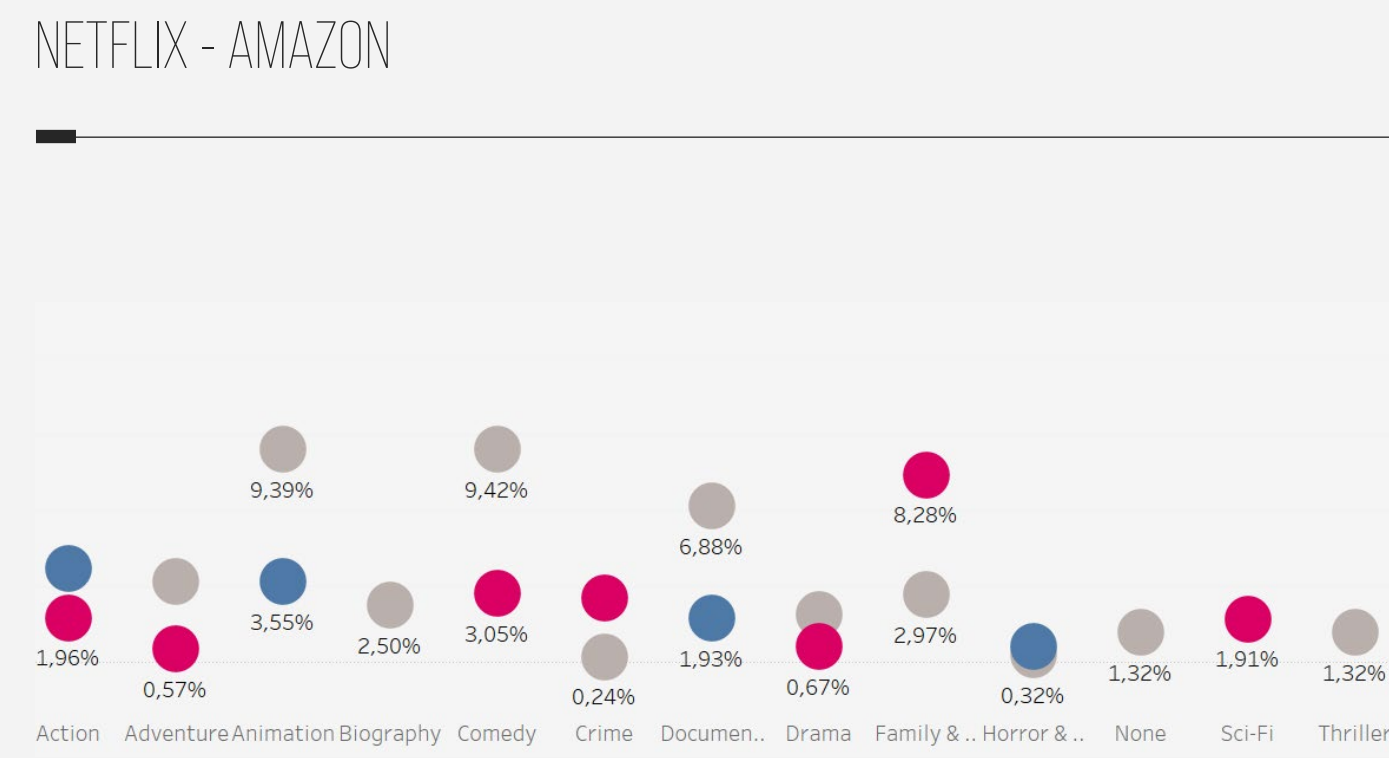
UK | 100 MOVIES | EUROPEAN FOCUS

LOCAL AND EUROPEAN MOVIES IN THE TOP 100 NETFLIX - AMAZON



SHOWING 15 | 27 - [See complete chart here](#)

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



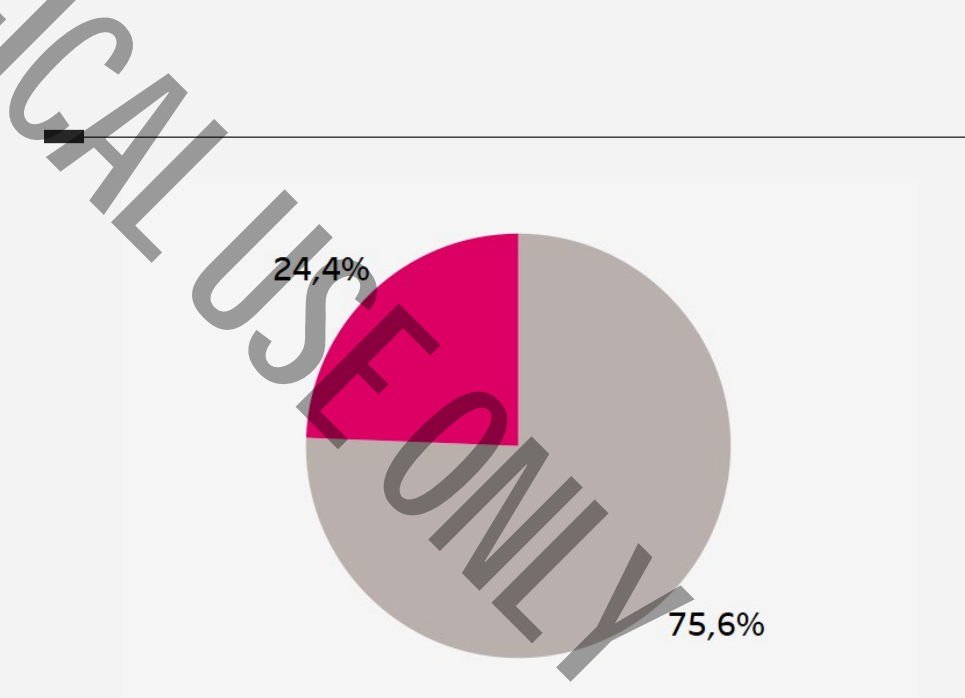
PRODUCTION COUNTRIES | EUROPE | UK | OTHERS

NUMBER OF TITLES BY GENRES NETFLIX - AMAZON

NETFLIX - AMAZON

GENRE	EU	UK
Action	3	3
Adventure		1
Animation	2	
Comedy		4
Crime		1
Documentary	2	
Drama		2
Family & Kids		7

CONTRIBUTION TO DRAMA STREAMS



THE FLUCTUATING FATE OF BRITISH LOCAL PRODUCTIONS

Local British productions witnessed the most pronounced dip among all markets studied. A month prior, British content proudly occupied a robust 72% of the European chart. However, this share has receded to just below 65%. Yet, it's not all gloom for British content. They have carved a potent niche for themselves in Animation and kids' content, amassing a whopping 4.9M streams this month. This represents an overwhelming 74% of the genre. Spearheading this movement is "Matilda", which alone garnered 1.1M streams, situating itself firmly within the Top 100 since its release December 2022. This film's sustained popularity on Netflix exemplifies the impressive endurance certain content can have, even amidst stiff competition.

Furthermore, the evergreen allure of the Harry Potter movie collection continues to stamp its mark on leaderboards. Collectively, such stalwarts elevate British Family content to represent 8% of the Top 100 viewing quota.

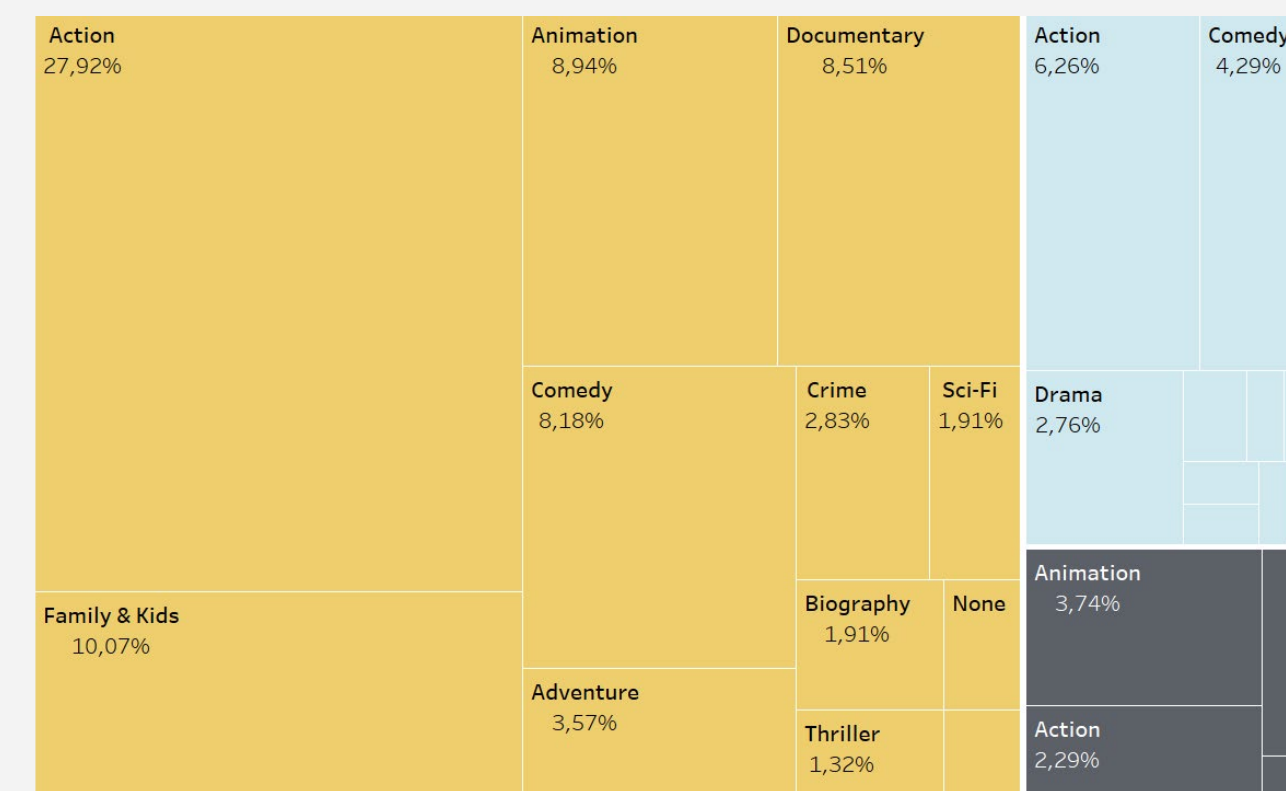
EUROPEAN PRODUCTIONS SHOWCASED A DIVERSE ARRAY OF GENRES

Meanwhile, German and French productions are fortifying their positions on the UK European charts, each capturing around a 3% share. Children's favourites like "Ladybug and Cat Noir", the Sci-fi flick "Paradise", the riveting documentary "The Deepest Breath", and the action-packed "Extraction 2" are some of the titles that have etched their names in the Top 49. Conversely, Italian content has been conspicuously absent from the Top 100 charts since the dawn of 2023.

UK | 100 MOVIES | SVOD PLATFORMS

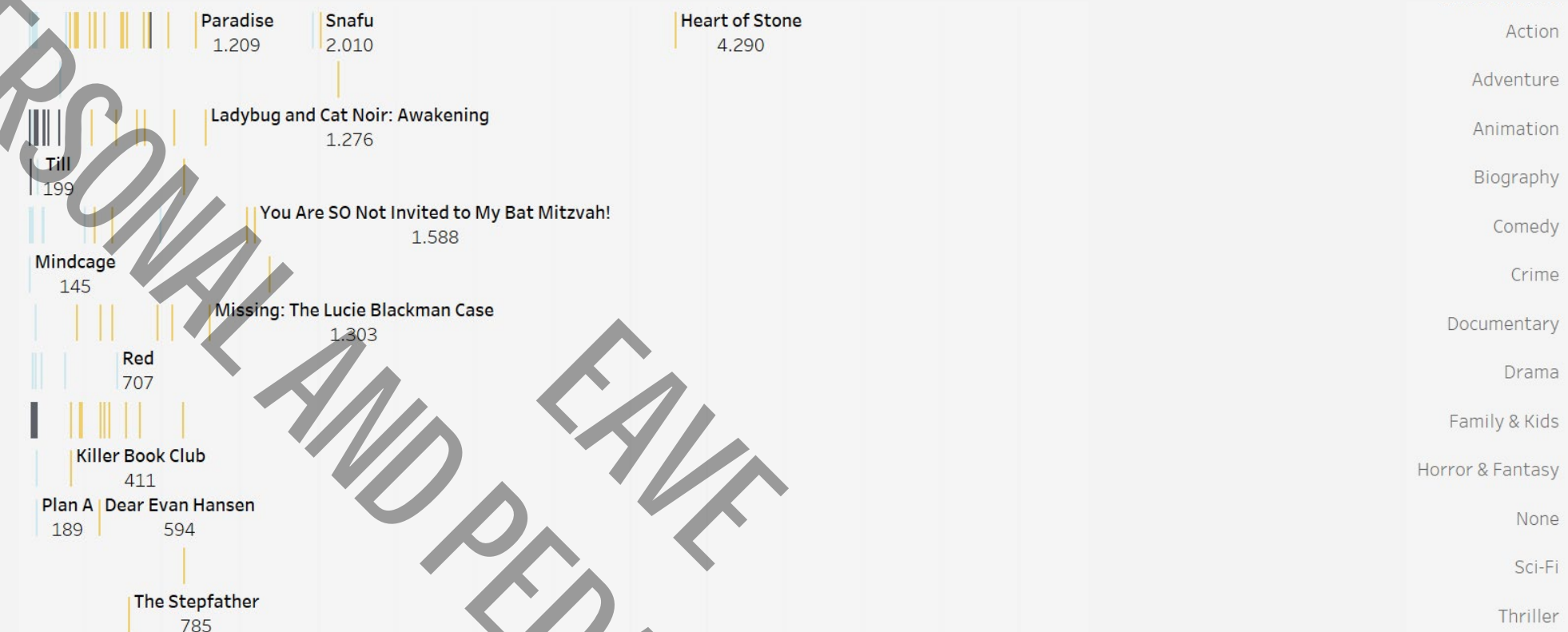
MOST WATCHED GENRES

SHARE BY PLATFORM

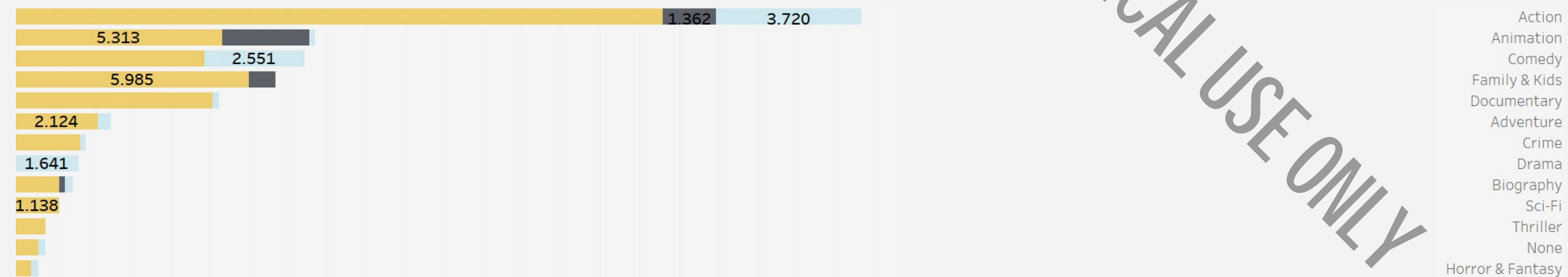


TOTAL STREAMS BY GENRES

PLATFORM COMPARATIVE



TOP SHOWS STREAMS BY GENRES



OTT | AMAZON | NETFLIX | DISNEY

DISNEY+ CLIMBS THE LADDER: KID-CENTRIC CONTENT PROPELS IT FORWARD

In British households, the mantra seems clear: when it comes to voracious streaming, kids reign supreme. Recognizing this trend, Disney+, the entertainment titan, has masterfully tailored its library to serve this young audience. Through a carefully curated collection of Animation and Family-friendly content, Disney+ inches tantalisingly close to Amazon Prime Video's performance metrics. Yet, despite this strategic targeting, Disney+ hasn't managed to clinch the top spots on the charts. Those coveted positions are still predominantly held by Netflix. While Disney+ has made significant strides in catering to the younger audience, capturing those lead positions remains elusive.

On the other hand, Amazon Prime Video has strategically positioned itself in the Drama sector. With nearly 3% of the total market share, Prime Video has produced hits that resonate deeply with mature audiences. "Red", a compelling drama, and "Alice, Darling", which spotlights Anna Kendrick as a young woman ensnared in a stifling and abusive relationship, serve as prime examples. The latter, especially, offers a drama charged with adrenaline, capturing the attention of viewers seeking intense emotional experiences.

UK | 100 SHOWS | OVERVIEW

TOTAL STREAMS BY SHOW

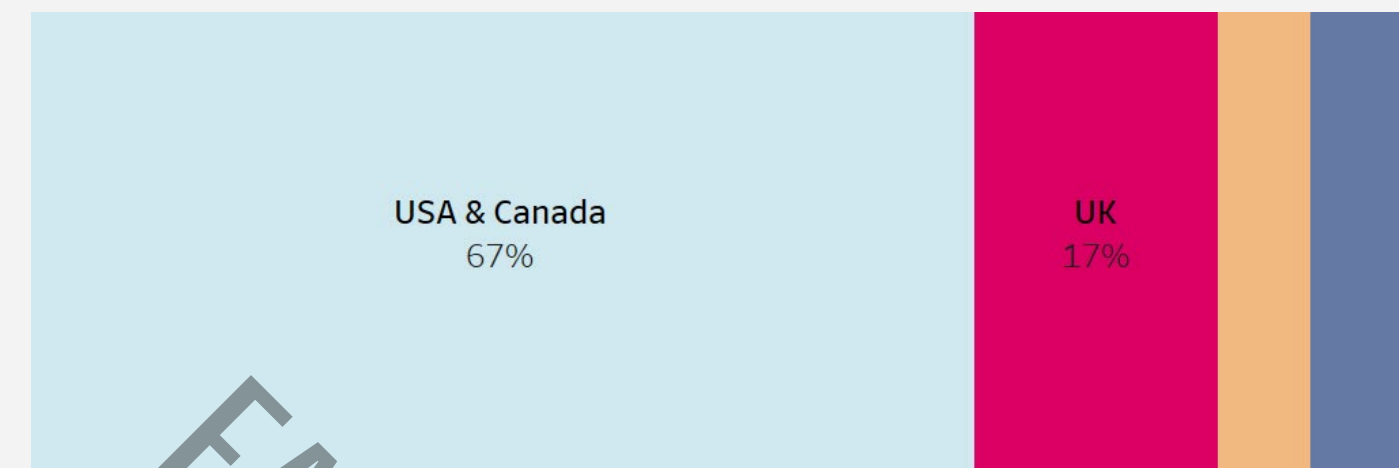
NETFLIX - AMAZON

Nº	MOVIE	PLATFORM	GENRE	STREAMS
1	Friends	Netflix	Comedy	44.475
2	The Big Bang Theory	Netflix	Comedy	42.366
3	Bluey	Disney+	Family & Kids	33.243
4	Grey's Anatomy	Disney+	Comedy	32.728
5	At Home with the Furys	Netflix	Documentary	29.642
6	Heartstopper	Netflix	Family & Kids	28.647
7	Young Sheldon	Netflix	Family & Kids	20.274
8	The Lincoln Lawyer	Netflix	Drama	19.788
9	Gossip Girl	Netflix	Family & Kids	18.770
10	Manifest	Netflix	Drama	18.551
11	The Vampire Diaries	Netflix	Family & Kids	17.508
12	Family Guy	Disney+	Animation	16.028
13	Painkiller	Netflix	Drama	14.559
14	Modern Family	Disney+	Comedy	13.672
15	Brooklyn Nine-Nine	Netflix	Comedy	12.350
16	Only Murders in the Buildi..	Disney+	Comedy	11.794
17	Who Is Erin Carter?	Netflix	Action	11.680
18	Grizzly and the Lemmings	Netflix	Family & Kids	10.110
19	Good Omens	Amazon	Action	10.101
20	The Bear	Disney+	Drama	8.187
21	The Office US	Netflix	Comedy	8.025
22	The Witcher	Netflix	Drama	6.989
23	Baki Hanma	Netflix	Animation	6.749
24	Boy Girl Dog Cat Mouse C..	Netflix	Family & Kids	5.623
25	Ahsoka	Disney+	Drama	5.354
26	Total Drama	Netflix	Comedy	5.270
27	The Summer I Turned Pret..	Amazon	Drama	5.000
28	Derry Girls	Netflix	Family & Kids	4.969
29	Futurama	Disney+	Comedy	4.896
30	Fatal Seduction	Netflix	Drama	4.626
31	Sweet Magnolias	Netflix	Drama	4.498
32	The Adventures of Paddin..	Netflix	Family & Kids	4.286
33	Rich Holiday, Poor Holiday	Netflix	Game-Show & R	4.062
34	Superstore	Netflix	Comedy	3.902
35	9-1-1	Disney+	Drama	3.894
36	9-1-1: Lone Star	Disney+	Drama	3.638
37	Harlan Coben's Shelter	Amazon	Drama	3.156
38	Tom Clancy's Jack Ryan	Amazon	Drama	2.664
39	The Lost Flowers of Alice ..	Amazon	Drama	2.575

SHOWING 39 | 46 - [See complete chart here](#)

CATALOG SHARE BY COUNTRY

NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES

NETFLIX - AMAZON



PRODUCTION COUNTRIES | USA & CANADA | EUROPE | UK | ASIA | LATAM | OTHER

WHEN IT RAINS STREAMS: BRITISH PLATFORMS MAKE A SPLASH IN AUGUST

British streams are once again gaining momentum and experiencing a resurgence in growth in the month of August. It's evident that leisure time is a key factor in this trend. It appears that geographical location and basically the weather are influencing platform usage. This is particularly pronounced in the UK, the only market where we observed growth among the top five this month. Moreover, it seems that the preferred genre for screen time, almost akin to a popular choice, is Comedy, now accounting for a substantial 38.75% of the streaming share. This is evident through the presence of classics like "Friends" and "The Big Bang Theory" which consistently appear in almost every report.

"BLUEY" IS MAKING A MARK IN THE STREAMING LANDSCAPE

Apart from the local category, there is another category that is gaining significant traction. The "Others" category has captured 7.76% of the streaming market. This is primarily driven by the success of Australian kids series "Bluey," a series that, within just five months since its introduction to Think Data, has amassed an impressive 456M streams across the five markets. This places it comfortably at the 17th position in the list of most-watched shows on Think Data.

FOR PERSONAL AND EDUCATIONAL USE ONLY

UK 100 SHOWS

AUGUST DIGEST

THINK DATA

UK | 100 SHOWS | EUROPEAN FOCUS

LOCAL AND EUROPEAN SHOWS IN THE TOP 100

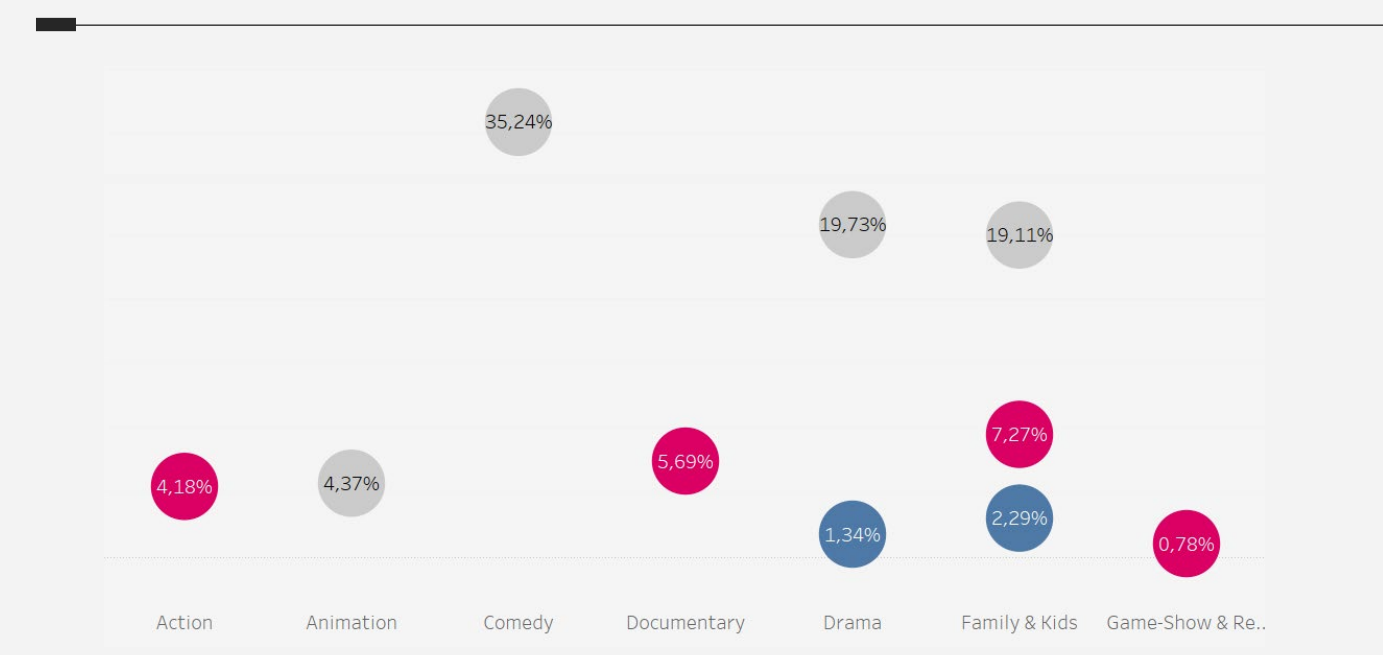
NETFLIX - AMAZON

Nº	MOVIE	SEASON	PLATFORM	COUNTRY	POSITION	GENRE	STREAMS
1	At Home with the Furys	1	Netflix	UK	1	Documentary	29,642
2	Heartstopper	2	Netflix	UK	2	Family & Kids	23,195
3	Who Is Erin Carter?	1	Netflix	UK	27	Family & Kids	5,452
4	Grizzly and the Lemmings	3	Netflix	FR	6	Action	11,690
5	Good Omens	2	Amazon	UK	7	Family & Kids	10,110
6	The Witcher	1	Amazon	UK	8	Action	8,155
7	Derry Girls	3	Netflix	PO	13	Drama	4,945
8	The Adventures of Paddin..	2	Netflix	UK	31	Family & Kids	6,989
9	Rich Holiday, Poor Holiday	2	Netflix	UK	40	Family & Kids	4,969
10	Miraculous: Tales of Lady..	2	Disney+	FR	42	Game-Show & Reality-TV	4,286
					38	Family & Kids	4,062
							1,846

SHOWING 10 | 10 - [See complete chart here](#)

CONTRIBUTION OF LOCAL & EUROPEAN SHOWS TO TOTAL STREAMS

NETFLIX - AMAZON

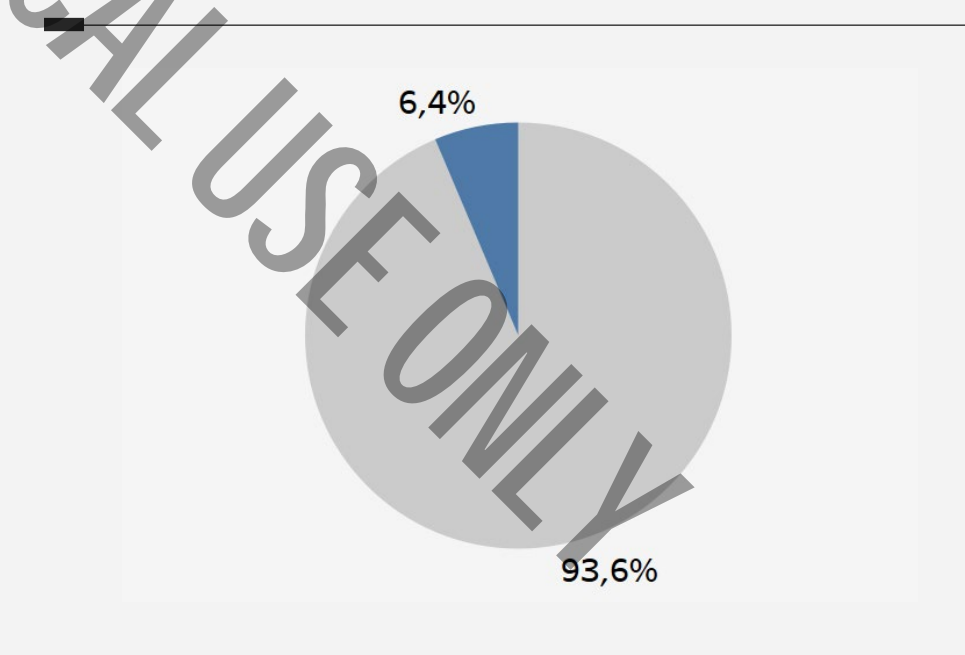


NUMBER OF TITLES BY GENRES

NETFLIX - AMAZON

GENRE	EU	OTHERS	UK
Action			2
Documentary			1
Drama	1		
Family & Kids	2	1	3
Game-Show & Reality-TV			1

CONTRIBUTION TO DRAMA STREAMS



PRODUCTION COUNTRIES | ■ EUROPE | ■ UK | ■ OTHERS

LOCAL STREAMING TRENDS: LOCAL PRODUCTS MAKE A SPLASH

August was a month for growth in local streaming patterns, accounting for a significant 19% of the total streams, marking the highest share observed this year. This phenomenon also corresponds to the highest volume of streams, reaching a cumulative total of 99M. The key driving factors behind this surge are the following shows.

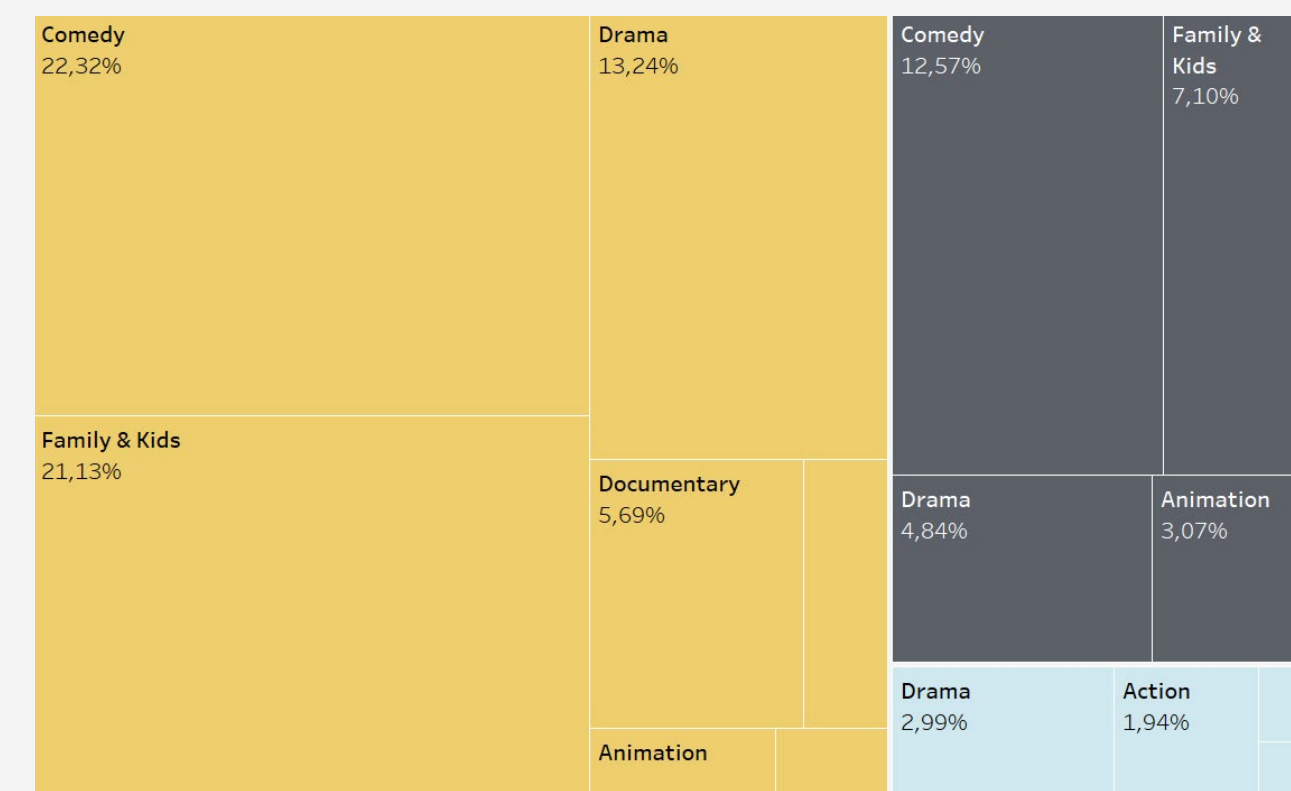
First and foremost, "At Home with the Furys", a celebrity family show reminiscent of "Keeping Up with the Kardashians" but set in Morecambe, takes the spotlight. This series follows the life of WBC heavyweight boxer Tyson Fury and his family. The first season was made available on Netflix on August 16th, and it swiftly garnered such attention that a second season was promptly renewed. It's evident that the enduring trend of programs like 'KUWTK' maintains its influence. The series amassed a notable 29.6M views. Continuing in the vein of gripping and true crime-themed content after the success of "Dahmer" and similar titles, Netflix continues to offer such content to its viewers. In this context, "Who is Erin Carter?" fits neatly within this category, accumulating 28.6M streams this month across all markets.

Additionally, "Heartstopper", a modest yet heartwarming series, has unveiled its second season, contributing to the expansion of this heartwarming content category. Specifically, the series has captured the hearts of viewers in the UK, generating 28.6M streams within the confines of their homes. This expansion speaks to the growing appetite for this type of content and its positive impact on streaming trends.

UK | 100 SHOWS | SVOD PLATFORMS

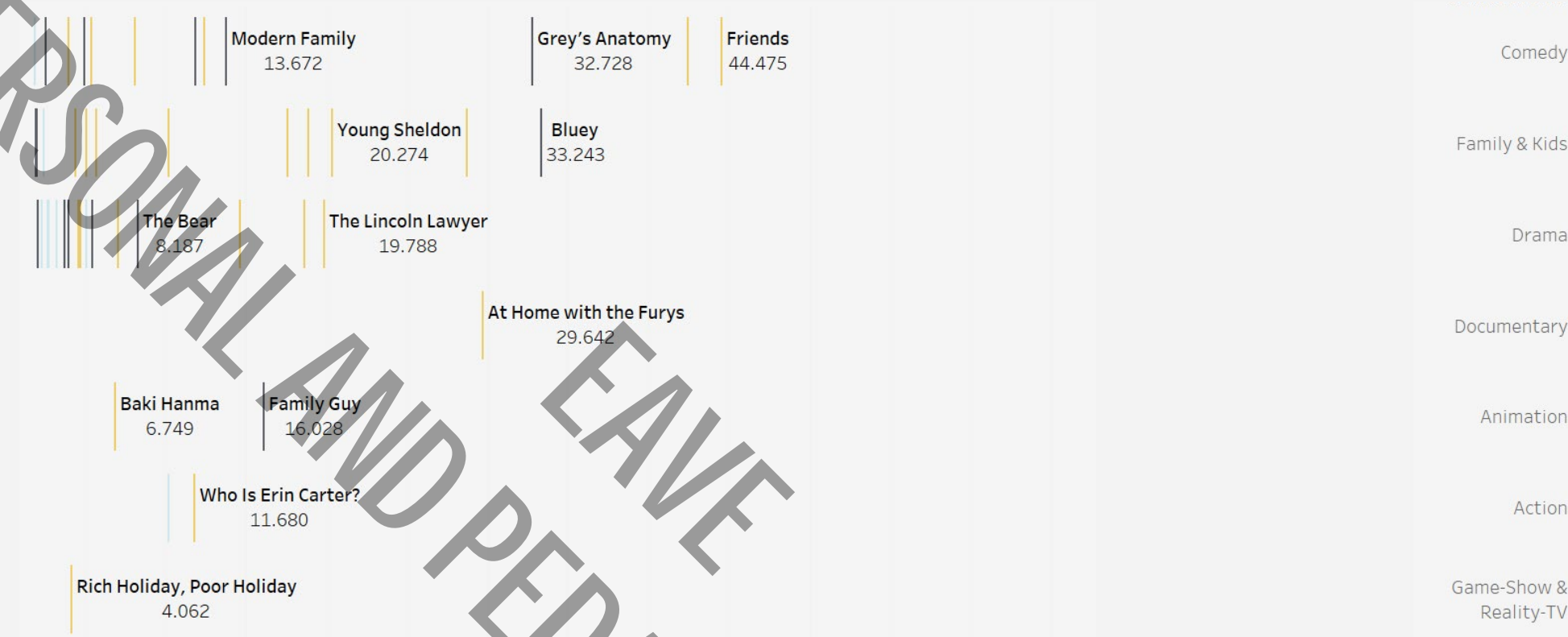
MOST WATCHED GENRES

SHARE BY PLATFORM

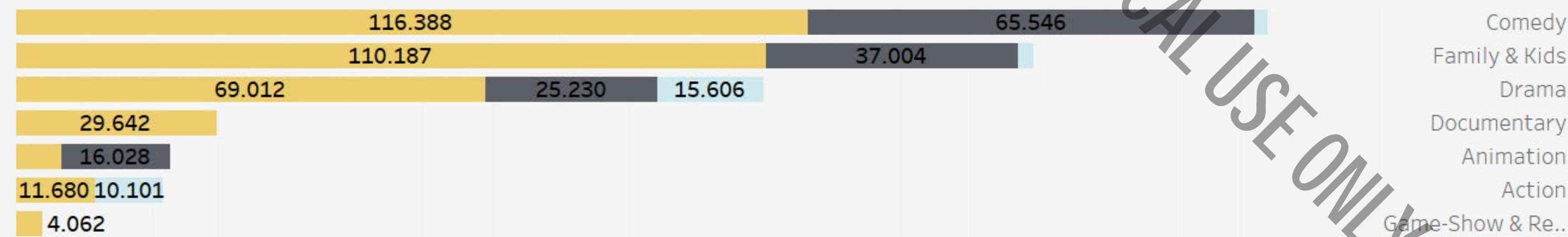


TOTAL STREAMS BY GENRES

PLATFORM COMPARATIVE



TOP SHOWS STREAMS BY GENRES



OTT | AMAZON | NETFLIX | DISNEY

NETFLIX STAGES A COMEBACK, WHILE DISNEY+ SEES A DECLINE

In the current month, we observe a notable resurgence on the part of Netflix, a platform that had gradually been losing its prominence since Disney+ became a part of our reporting landscape. Between then and last month, July, Netflix had witnessed a decrease of nearly 90 million streams within the British market. However, this month, Netflix has rebounded with an increase of nearly 50M streams, slowly regaining its former position. The question that arises is whether it can sustain this upward trajectory.

On the flip side, we notice a decline in Disney+ performance. After holding a 36.9% share just last month, it has experienced a reduction of almost 10%, returning to 27.5% of the market. Key contributors to this shift include the aforementioned "Bluey", along with stalwarts like "Grey's Anatomy" and "Family Guy". Amazon, on the other hand, has managed to recover a portion of its market share, standing at 5.72% at present, thanks in part to series such as "Good Omens" and "The Summer I Turned Pretty", as well as their summer acquisitions. It's worth noting that Amazon has only managed to secure 9 titles in the Top 100 seasons for this month, indicating a relatively modest performance.

HOW CAN INDEPENDENT EUROPEAN CINEMA TAKE ADVANTAGE OF THE SUPERPOWER OF IP, LICENSING AND SERIALISATION?

In the last UK's Hot title, we talked about the evolving world of streaming and how IP, Licensing, and Serialisation have become essential for content platforms seeking to maximise economic gains and audience engagement. We discussed how this shift is a response to the challenges of subscription-based monetization. Film theorist Violeta Kvasics highlights the transformation of mainstream cinema into a serial format, akin to television series, where titles become part of a brand. As it is currently evident and a landmark of our times, major streaming players are investing in building their IP franchises, while established giants leverage iconic brands.

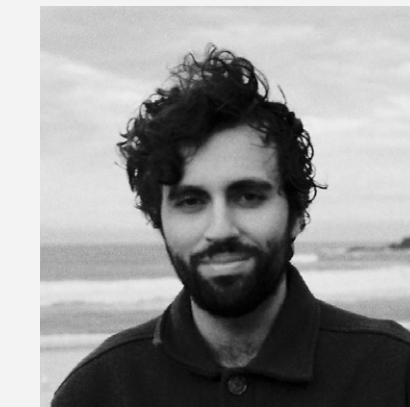
The recent resurgence of the "Harry Potter" saga that we witnessed in May, June and July saga in the UK market, particularly in July, illustrates one more example of the strategic reshaping of content distribution and consumption. The concept of authorship is evolving, with showrunners and directors playing a pivotal role in the narrative. The announcement of a Harry Potter TV series reboot represents a fluid approach to IP serialisation and suggests strategic distribution of the original films across mainstream platforms over the new series' 10-year run. This transformative narrative landscape encourages comprehensive IP consumption, marking a significant shift in the industry. Serialisation is not only for series, it is also for films and directors.

Are Directors Brands? How can independent European cinema, rooted in an authorial conception of Film, take advantage of this trend? We wondered in



the last report. As we stated in that article, this contemporary phenomenon of serialisation should be understood as an iteration of the brand rather than the narrative content, and it's an approach that could also be adopted by the independent industry.

Due to a chronically underperforming Box Office, independent distributors have increasingly pampered their releases in recent years. Special screenings, some of them with talent presentations, and retrospectives have become common. In this new scenario, authors have also become brands, and their films are new chapters in that brand.



LUIS ACEITUNO
CONTENT MANAGER

“ **Special screenings, some of them with talent presentations, and retrospectives have become common. In this new scenario, authors have also become brands, and their films are new chapters in that brand.** ”

In Spain, for example, the independent distributor Avalon has specialised in creating its "Universes": reruns of directors' works at a national scale in the form of event-based cycles to capitalise on the momentum. These are accompanied by special screenings that can lead to luxury Home Entertainment editions, as in the case of Wong Kar-Wai's remastered collection. This constitutes an entire distribution and exhibition chain artificially driven.

The most recent example of these events involves the legendary Spanish director Víctor Erice, who has directed only three feature films at almost 50 years old but has received awards and prestige at the Cannes, San Sebastián, and Venice film festivals. The pretext was the release of his third film at the age of 80, "Close Your Eyes". The author-brand concept enables an apocryphal saga that opens the door to monetization and feedback on a variety of cultural products.

Serialisation as an iteration of a brand is within reach of the independent industry as well.

GERMANY | 100 MOVIES | OVERVIEW

TOTAL STREAMS BY MOVIE

NETFLIX - AMAZON

Nº	MOVIE	PLATFORM	GENRE	STREAMS
1	Heart of Stone	Netflix	Action	3.689
2	A Man Called Otto	Netflix	Comedy	2.162
3	Paradise	Netflix	Action	2.161
4	Snafu	Netflix	Action	1.583
5	Moonfall	Amazon	Action	1.448
6	The Little Things	Netflix	Crime	1.204
7	The Protégé	Netflix	Action	1.068
8	Zom100: Bucket List of th..	Netflix	Action	1.066
9	The First Purge	Netflix	Action	1.046
10	Valerian & the City of a Th..	Netflix	Action	1.038
11	Scream	Netflix	Horror & Fantasy	922
12	Happiness for Beginners	Netflix	Comedy	906
13	Soulcatcher	Netflix	Action	896
14	Mission: Impossible - Fall..	Netflix	Action	881
15	You Are SO Not Invited to..	Netflix	Comedy	876
16	The Covenant	Amazon	Action	860
17	The Monkey King	Netflix	Animation	783
18	Ghostbusters: Afterlife	Netflix	Adventure	783
19	Jurassic World: Fallen Kin..	Netflix	Action	750
20	Red White & Royal Blue	Amazon	Comedy	686
21	Shotgun Wedding	Amazon	None	681
22	Venom: Let There Be Carn..	Netflix	Action	678
23	Angel Has Fallen	Amazon	Action	678
24	Killer Book Club	Netflix	Horror & Fantasy	671
25	The Batman	Amazon	Action	644
26	Deep Impact	Netflix	Action	625
27	Poisoned: The Danger in O..	Netflix	Documentary	594
28	Missing: The Lucie Blackm..	Netflix	Documentary	531
29	Rambo: Last Blood	Amazon	Action	522
30	House of Gucci	Amazon	Biography	514
31	Missing	Netflix	Drama	509
32	Terrifier 2 (Uncut)	Amazon	Horror & Fantasy	497
33	The Meg	Amazon	Action	494
34	Sing 2	Amazon	Animation	454
35	The Outlaws	Netflix	Action	451
36	Godzilla vs. Kong	Netflix	Action	434
37	They Cloned Tyrone	Netflix	Comedy	406
38	A Life Too Short: The Isab..	Netflix	Documentary	400
39	Pitch Perfect 3	Netflix	Comedy	380
40	No Sudden Move	Netflix	Crime	365

SHOWING 40 | 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

ACTION ASCENDS IN GERMANY: A NEW PINNACLE IN VIEWERSHIP

Like in all analysed markets, Action movies have set a fresh benchmark in Germany, seizing a robust 56% of the viewership. The genre witnessed a remarkable growth, escalating by more than 47% from the previous month. With a staggering 26M streams, U.S. contributions lead the charge, capturing nearly 62% of the Action genre streams with 16M. Amidst this American dominance, the German Sci-fi dystopia flick "Paradise," launched in late July, stands out in several analysed markets. Crossing the 2.1M streams mark, it proudly waves the flag for local German production. Asia, meanwhile, carved out a respectable 12% slice of the action viewership pie, establishing itself as the genre's second-strongest contributor. In a testament to Action's prevailing popularity, the genre showcased its dominance by featuring 10 of its titles in the Top 15.

COMEDY CLIMB, ANIMATION AND HORROR MAINTAIN PACE

Comedies continue their steady stride, securing the second spot with a 13% share of the viewership. While Animation and Horror & Fantasy genres maintain a balanced presence. Spooky films classified five of their titles nestling within the Top 42. The Spanish Netflix Original, "Killer Book Club", claims the #24 spot, shadowed by the iconic horror classic, "Scream" at #11. The latter's prominence could possibly be attributed to its impending exit from the platform in September.

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GERMANY | 100 MOVIES | EUROPEAN FOCUS

LOCAL AND EUROPEAN MOVIES IN THE TOP 100

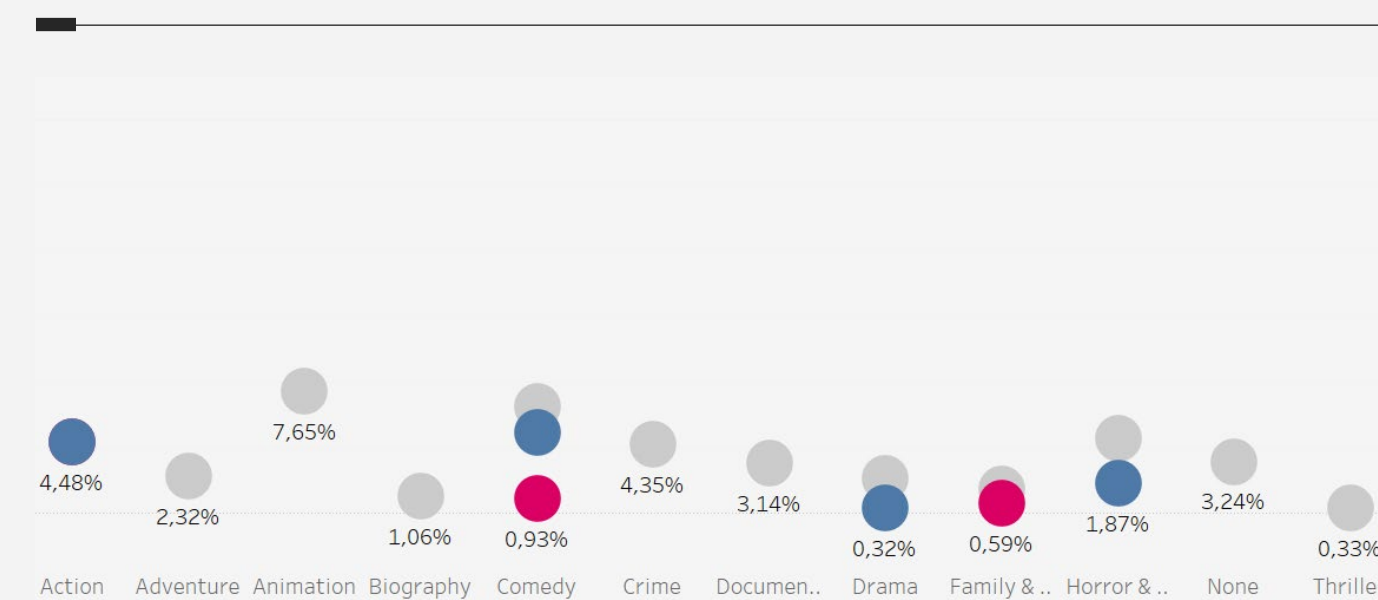
NETFLIX - AMAZON



SHOWING 15 | 22 - [See complete chart here](#)

CONTRIBUTION OF LOCAL & EUROPEAN MOVIES TO TOTAL STREAMS

NETFLIX - AMAZON



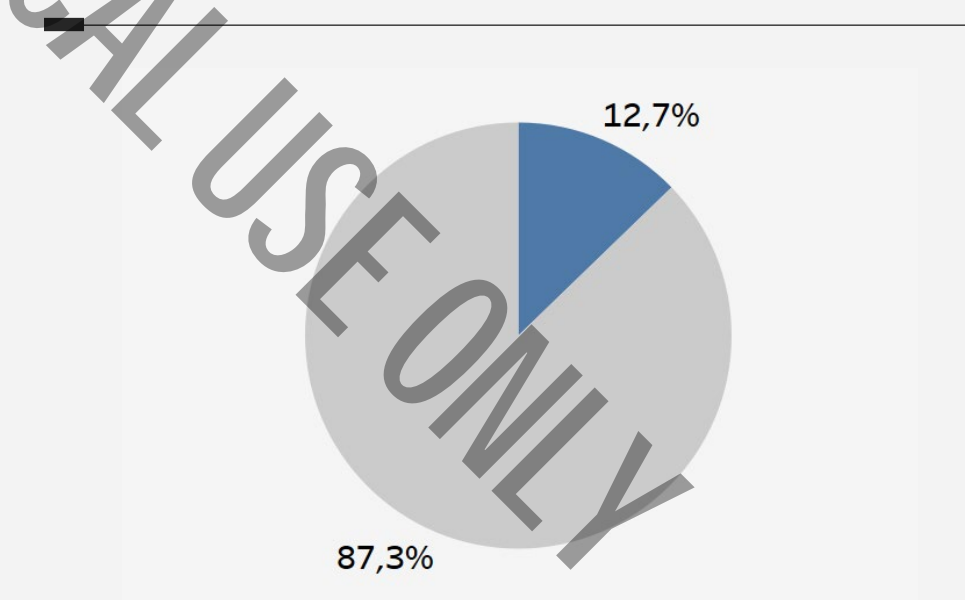
NUMBER OF TITLES BY GENRES

NETFLIX - AMAZON



CONTRIBUTION TO DRAMA STREAMS

NETFLIX - AMAZON



PRODUCTION COUNTRIES | ■ EUROPE | ■ GERMANY | ■ OTHERS

EUROPEAN INFLUENCE WANES, BUT SELECT TITLES SHINE

The European content quota has witnessed a decline, dipping by almost 9 percentage points. Despite this, "Paradise" has played a pivotal role in bolstering the German content share to 26%. Notably, even with such strong individual performers, Germany continues to have one of the lowest local content influences in its own domestic market.

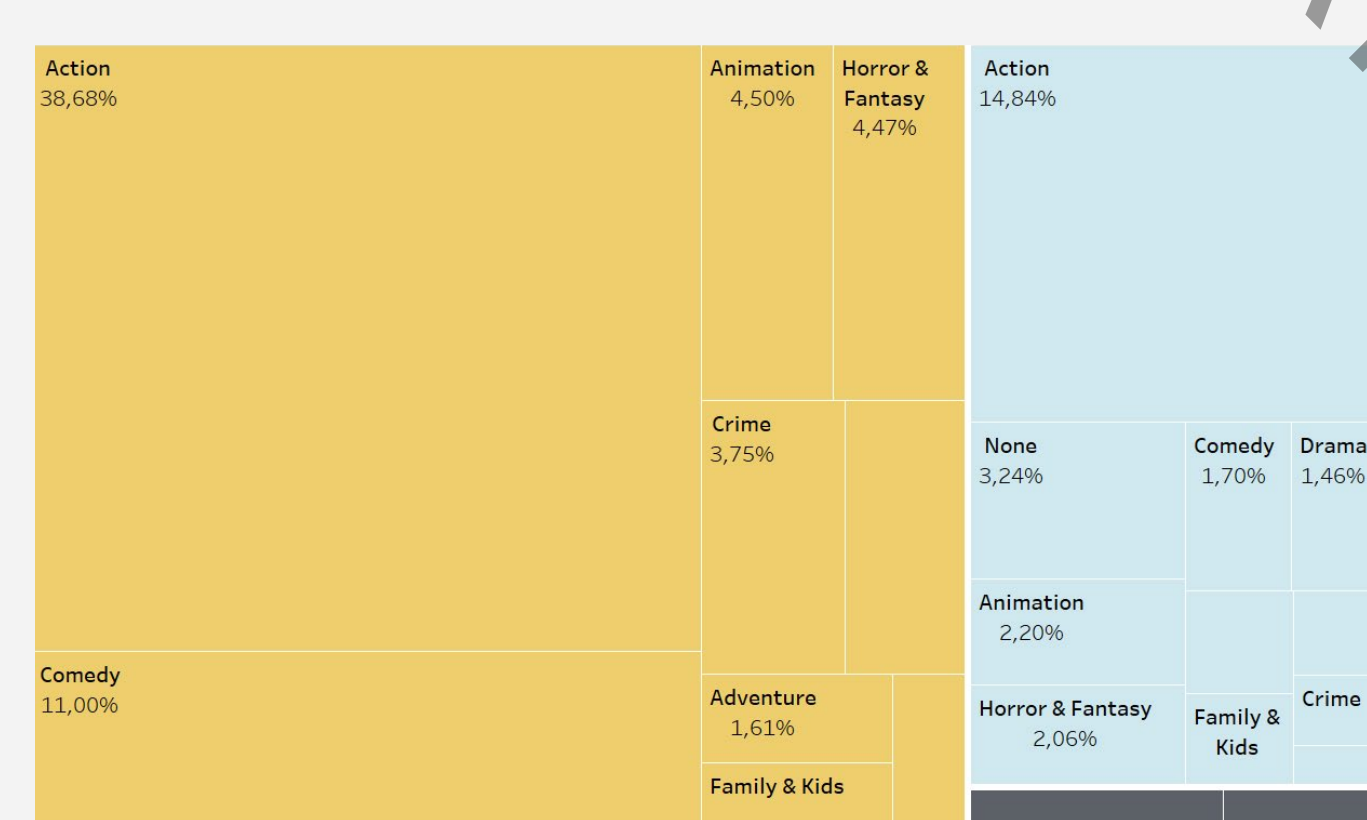
Away from the local gripping Sci-fi realm of "Paradise," the Comedy genre has its moments of brilliance. "Nightlife" comfortably secures the #37 spot, while "How About Adolf?" graces the tail end of Amazon Prime Video's top charts. Diving into the Horror & Fantasy arena, Spanish films seem to have carved a niche for themselves. Alongside the previously highlighted "Killer Book Club," "Bird Box: Barcelona" with Mario Casas takes its rightful place in the viewers' hearts.

Although European content contributions remain modest, they still play a crucial role in elevating the Drama category. The persistent success of the teen drama from Amazon MGM Studios, "Culpa Mía", stands as a testament to this. Remarkably, ever since its debut on June 8, a breaking point for Amazon, it has consistently maintained its position within the Top 100 list.

GERMANY | 100 MOVIES | SVOD PLATFORMS

MOST WATCHED GENRES

SHARE BY PLATFORM

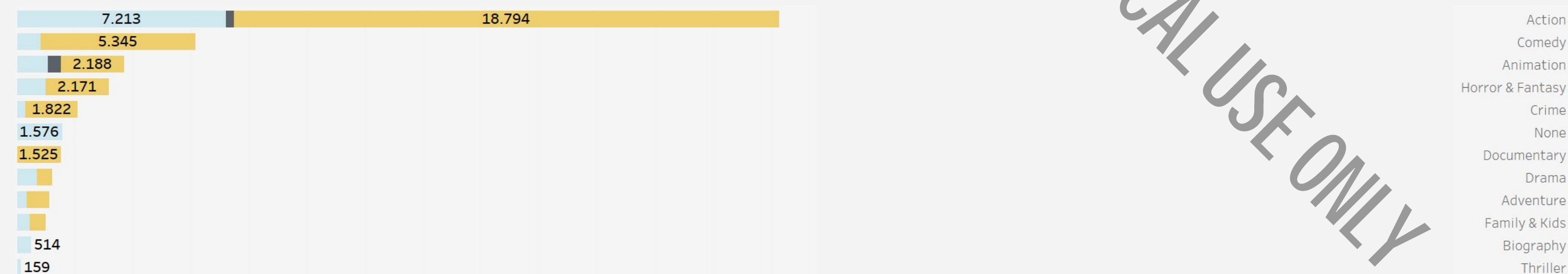


TOTAL STREAMS BY GENRES

PLATFORM COMPARATIVE



TOP MOVIES STREAMS BY GENRES



OTT | AMAZON | NETFLIX | DISNEY

STREAMING DYNAMICS: AMAZON SOARS, DISNEY+ STUMBLES

Amazon Prime Video has set a remarkable benchmark in Germany, seizing a market share of 29%. This is the highest quota the platform has achieved in the country, asserting its growing dominance. On the flip side, Disney+ seems to grapple with challenges, recording its most meagre influence to date. Despite this growth in power from the second players, Netflix persists as the market leader. The streaming giant showcases its prowess by always consistently reigning supreme across a multitude of genres - from Action and Comedy to Animation, Horror, and Crime. However, there's an exception to its dominance: the Biopic category. Here, the critically acclaimed "House of Gucci" has been drawing eyeballs on Prime Video, spotlighting the diversity and depth of Amazon's library.

Disney+, despite its global clout, languishes with less than 2% of the German market viewership. Curiously, while the platform is renowned for its children's content, it's Netflix that seems to be the preferred choice for young audiences in Germany regarding movies. Positioned at the tail-end of the list, Disney's content struggles to keep pace. Our data dives deep into viewer habits and indicates that children play an indispensable role as consumers within households. The tepid response to Disney+ movies suggests a potential shift in preference to shorter, episodic content, like series. This assumption gains further weight when we consider that the Family & Kids genre secured a strong second place in show viewership this month. Disney+ may need to recalibrate its strategy to cater more effectively to these evolving viewer patterns.

GERMANY | 100 SHOWS | OVERVIEW

TOTAL STREAMS BY SHOW

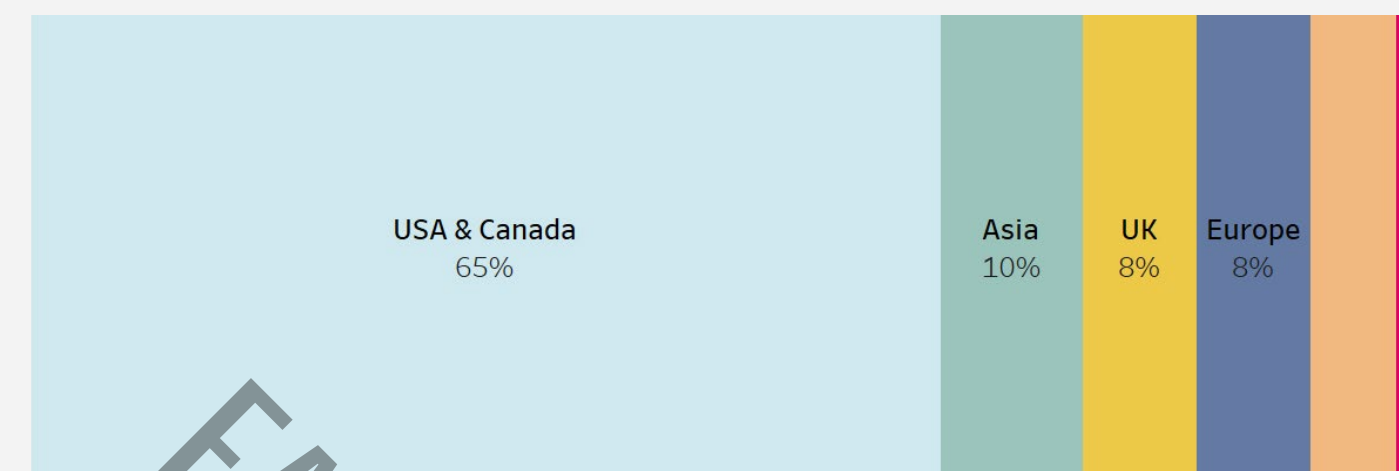
NETFLIX - AMAZON

Nº	MOVIE	PLATFORM	GENRE	STREAMS
1	The Blacklist	Netflix	Comedy	33.120
2	The Rookie	Netflix	Comedy	25.440
3	The Big Bang Theory	Netflix	Comedy	15.293
4	The Vampire Diaries	Netflix	Family & Kids	2.531
		Amazon	Family & Kids	10.742
5	Gossip Girl	Netflix	Family & Kids	6.502
6	The Lincoln Lawyer	Netflix	Drama	14.254
7	Heartstopper	Netflix	Family & Kids	11.889
8	Brooklyn Nine-Nine	Netflix	Comedy	11.199
9	Modern Family	Disney+	Comedy	10.203
10	Bluey	Disney+	Family & Kids	10.011
11	Grey's Anatomy	Disney+	Comedy	9.285
12	Two and a Half Men	Amazon	Comedy	9.113
13	The Summer I Turned Pret..	Amazon	Drama	8.926
14	The Witcher	Netflix	Drama	6.553
15	PAW Patrol	Netflix	Family & Kids	6.508
16	Painkiller	Netflix	Drama	6.238
17	New Girl	Disney+	Comedy	6.136
18	Miraculous: Tales of Lady..	Disney+	Family & Kids	5.870
19	Boruto: Naruto Next Gene..	Netflix	Animation	5.848
20	Who Is Erin Carter?	Netflix	Action	5.780
21	Ragnarok	Netflix	Drama	5.060
22	Good Omens	Amazon	Action	5.023
23	Depp V Heard	Netflix	Documentary	4.539
24	Naruto: Shippūden	Netflix	Animation	4.471
25	Takeshi's Castle Project	Amazon	Game-Show & Re	4.283
26	Baki Hanma	Netflix	Animation	3.660
27	Only Murders in the Buildi..	Disney+	Comedy	3.302
28	Un cuento perfecto	Netflix	Comedy	3.118
29	My Happy Marriage	Netflix	Drama	2.825
30	Fatal Seduction	Netflix	Drama	2.772
31	Too Hot to Handle	Netflix	Game-Show & Re	2.702
32	Monster	Netflix	Animation	2.629
33	The Chosen One	Netflix	Comedy	2.560
34	Das Haus Anubis	Netflix	Drama	2.382
35	Manifest	Netflix	Drama	2.369
36	Friends	Netflix	Comedy	2.348
37	Sweet Magnolias	Netflix	Drama	2.331
38	Station 19	Disney+	Family & Kids	2.289
				2.231

SHOWING 38 | 49 - [See complete chart here](#)

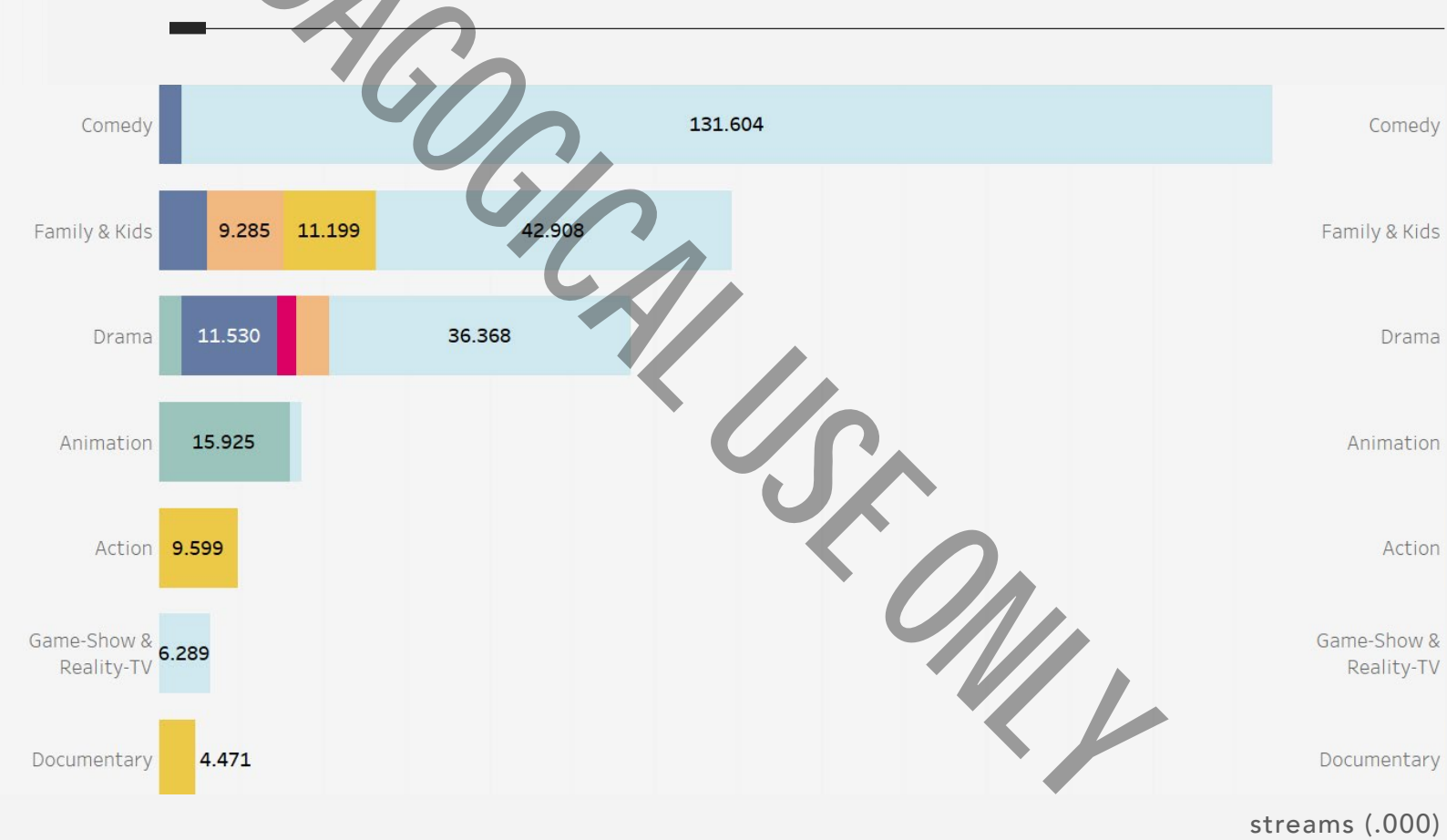
CATALOG SHARE BY COUNTRY

NETFLIX - AMAZON



GENRES TOTAL STREAMS BY COUNTRIES

NETFLIX - AMAZON



PRODUCTION COUNTRIES | USA & CANADA | EUROPE | GERMANY | ASIA | UK | LATAM | OTHER

STREAM DECLINE IN THE GERMAN MARKET - A CRUEL SUMMERS

Just like what's happening in Italy and France, the German market took a bit of a hit this month. The Top #100 TV shows saw a considerable drop in accumulated streams. They managed to scrape together only 298M streams, making August the month with the fewest views for TV series in 2023. It's a bit worrisome, to say the least. However, when we check out the movie scene, it's a different story. The Top #100 movies saw a great surge in stream accumulation, even beating out the Spanish market, and it's one of the best numbers for 2023. We'll have to wait and see if the Germans should be breaking a sweat.

FAREWELL TO ACTION, HELLO COMEDY AND FAMILY & KIDS

Unlike the film over present trend, this month, Action series pretty much vanished from the radar. They'd been hogging the spotlight for the last three months, but now it's Comedy's time to shine, grabbing a whopping 46.58% of the market, one of the biggest shares it's ever had. Shows like "The Blacklist", "The Rookie", "The Big Bang Theory" and "Brooklyn Nine-Nine" are ruling the Comedy scene. Also, don't forget about the family & kids' content - it's a big player this time around.

FOR PERSONAL AND EDUCATIONAL USE ONLY

GERMANY 100 SHOWS

AUGUST DIGEST

THINK DATA

GERMANY | 100 SHOWS | EUROPEAN FOCUS

LOCAL AND EUROPEAN SHOWS IN THE TOP 100

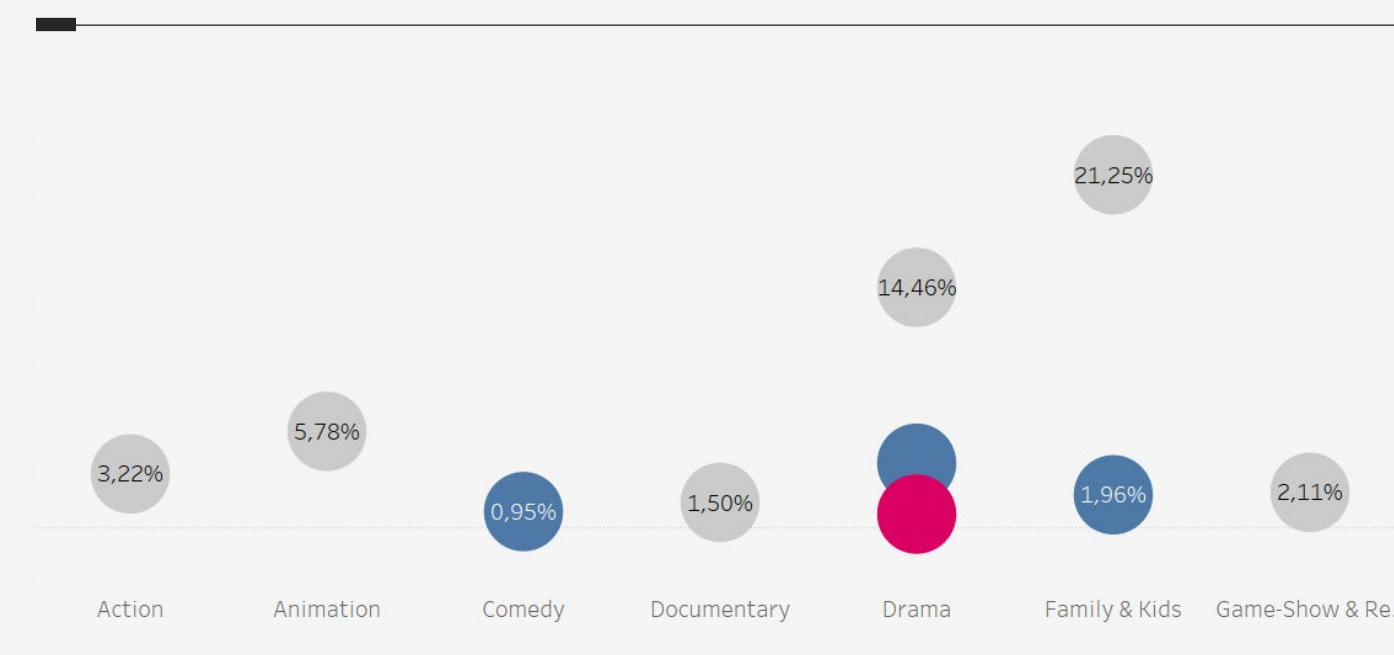
NETFLIX - AMAZON

Nº	MOVIE	PLATFROM	POSITION	GENRE	STREAMS
1	The Witcher	3 Netflix	PO 6	Drama	6.508
2	Miraculous: Tales of Ladybug & Cat Noir	5 Disney+	FR 10	Family & Kids	1.798
3	Ragnarok	3 Netflix	DK 12	Drama	5.023
4	Un cuento perfecto	1 Netflix	ES 32	Comedy	2.825
5	Das Haus Anubis	2 Netflix	DE 44	Drama	2.369

SHOWING 5 | 5 - [See complete chart here](#)

CONTRIBUTION OF LOCAL & EUROPEAN SHOWS TO TOTAL STREAMS

NETFLIX - AMAZON

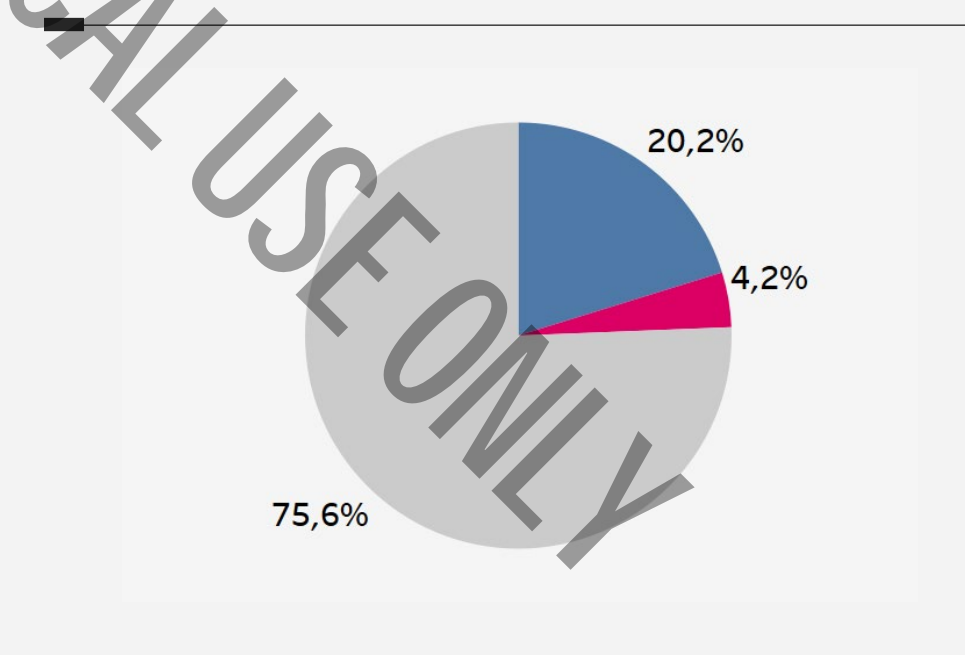


NUMBER OF TITLES BY GENRES

NETFLIX - AMAZON

GENRE	EU	GERMANY
Comedy	1	
Drama	2	1
Family & Kids	1	

CONTRIBUTION TO DRAMA STREAMS



PRODUCTION COUNTRIES | EUROPE | GERMANY | OTHERS

ONLY ONE LOCAL PRODUCT ENTERS THIS TOP #100

As usual in the German market, American and Canadian productions consistently grab over 70% of the share. Specifically, for the month of August, that figure stands at 73.24%. This situation, combined with the absence of European and local titles on the lists, leaves these markets with a share below 2%.

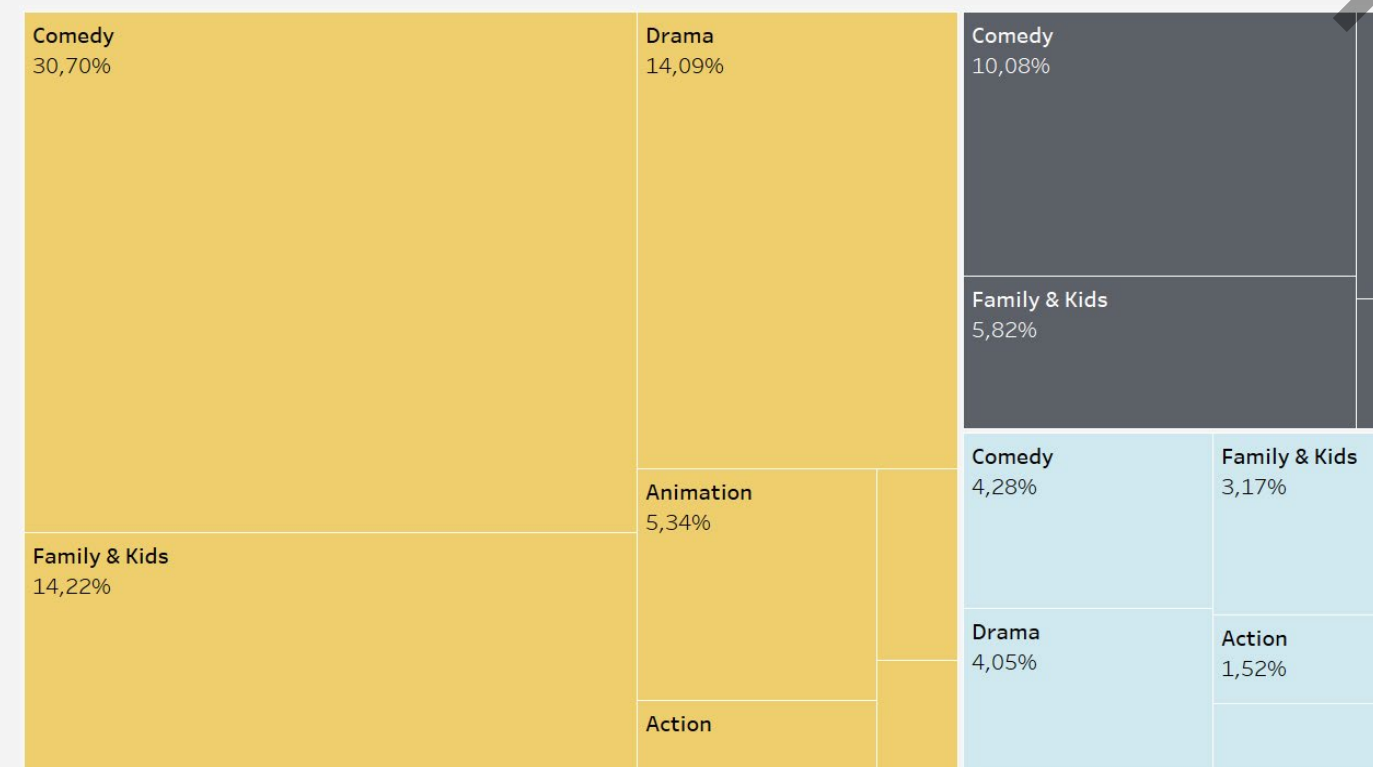
This month, only one German title manages to break into the top, "Das Haus Anubis", racking up 2.3M streams. This series, one of Nickelodeon's major in-house productions, seems to have reappeared in the German market to stay. It's another sign that those long-standing IPs can indeed be profitable for the platforms.

On the European side, we do spot a couple more titles. Notably, the third season of "The Witcher" gains 6.5M views here, with its overall total accumulating to 121M streams across all European markets since its release. "Ragnarok", a Norwegian series that deals with climate change and industrial pollution while reimagining Norse mythology, amasses 5M streams. Lastly, the Spanish series "Un Cuento Perfecto" accumulates 2.8M views here.

GERMANY | 100 SHOWS | SVOD PLATFORMS

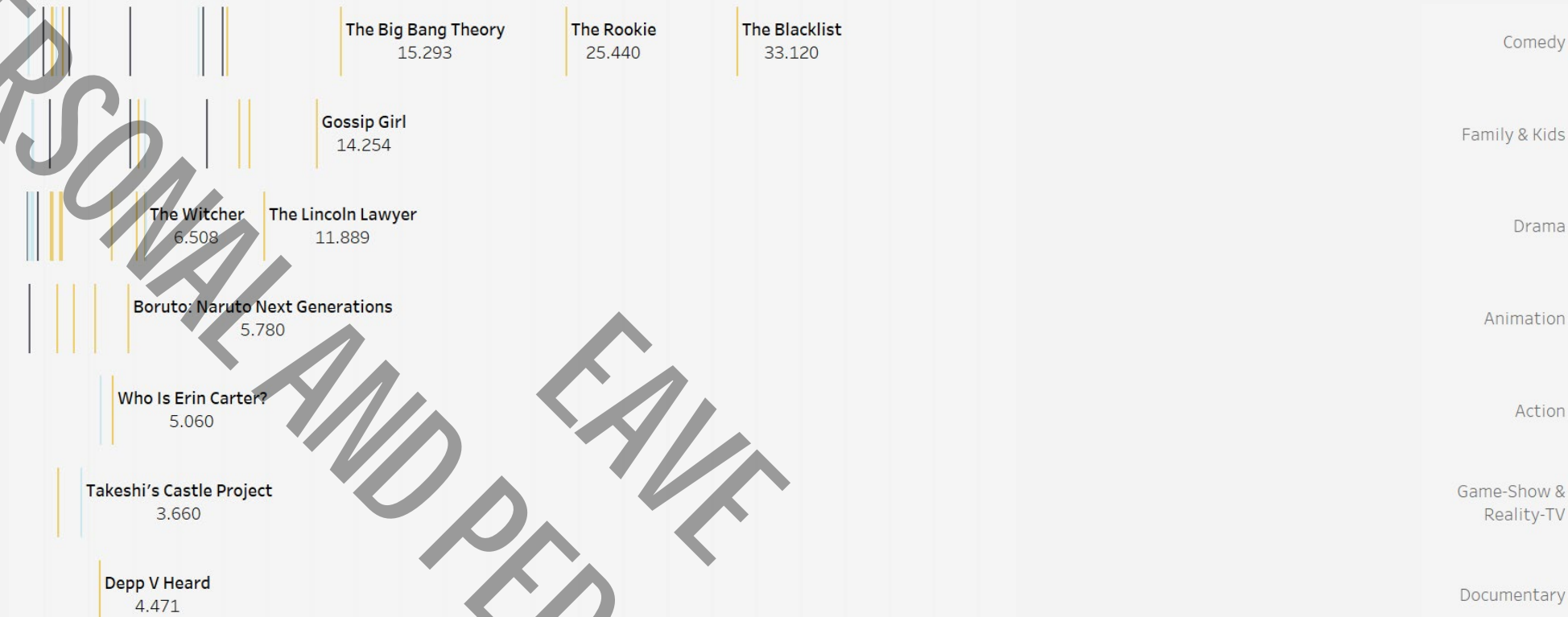
MOST WATCHED GENRES

SHARE BY PLATFORM

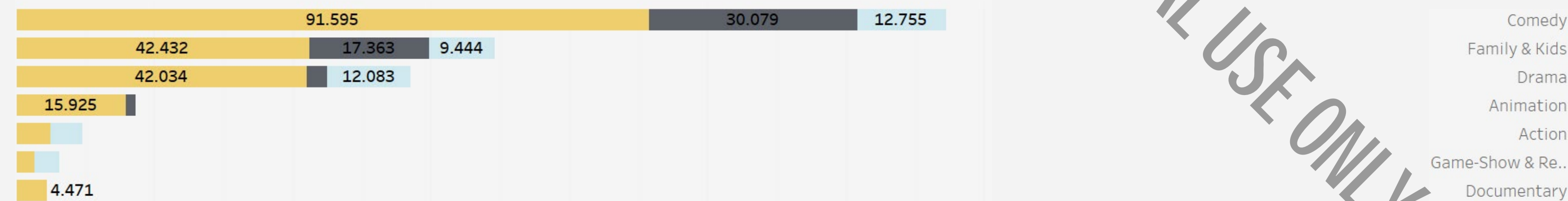


TOTAL STREAMS BY GENRES

PLATFORM COMPARATIVE



TOP SHOWS STREAMS BY GENRES



OTT | AMAZON | NETFLIX | DISNEY

DISNEY'S DIP IS AMAZON'S GAIN

This month around here, we've noticed a significant drop in the Walt Disney platform, losing nearly 30% of its streams, now settling with a 17.33% share. Netflix and, especially, Amazon are the ones benefiting from this loss, with Amazon gaining an extra 5% of share compared to last month. However, despite this being good news, it's true that ever since Disney+ joined Think Data reports, Prime Video hasn't quite returned to its glory days, those months when it even reached a quarter of the market share.

Nonetheless, the German market remains the one where Prime Video secures the most significant market share. This month, notable titles on this platform include "The Vampire Diaries," "Two and a Half Men," "The Summer I Turned Pretty" and "Good Omens." For the Walt Disney platform, the hits this month include "Modern Family," "Bluey," "Grey's Anatomy" and more.

“PARADISE” AND THE QUEST FOR MORE: THE PRICE OF SELLING TIME

“Paradise” is a German Sci-fi Dystopia film directed by the Boris Kunz, known for his work on the successful two-season series “Hindafing”, which received nominations for various television awards. Furthermore, Kunz has directed other notable series boosted by local or regional SVOD services such as “Acht Tage” (Sky), “Labale & Erben” (SWR), and “Breaking Even” (ZDFneo). The film premiered at Munich Film Festival, one month before its release on Netflix in July 2023. The movie was primarily shot in locations in Germany and Lithuania, with a special focus on cities like Berlin and Vilnius.

This month, when European content has had an exceptionally positive performance thanks to Glocal Originals, it was the third most watched film in Germany competing with films worldwide with 2.9M streams in its local market and 11.6M across markets. The 16K reviews on IMDB rate Paradise at 6.3 out of 10.

The film begins with an atmosphere reminiscent of “Black Mirror”, featuring thematic elements, an aesthetic proposal, cool colour palettes, sound, and music that immerse the audience in a dystopian future. In the open-



“Are platforms looking for comparable Glocal titles that can make a blast in the middle of a streaming wards summer? With our data, we bet they do.”

ing scene, we meet Max (played by Kostja Ullmann), the protagonist, as he tries to persuade a young migrant living in poverty to sell years of his life in exchange for a better future. Max himself mentions that he made this decision to fund his education. Max is the Employee of the Year at AEON, a successful and dangerous company leading this controversial business, under the leadership of Olivia Theissen (played by Iris Berben).

Despite some people altering their appearance due to age changes, the film’s plot is clear and maintains the audience’s attention throughout its nearly two-hour runtime, incorporating elements of love and action that appeal to a broader audience beyond just sci-fi enthusiasts.



JULIANA SCHWINDT
AUDIOVISUAL STRATEGIST

As critical viewers, we contemplate the question: What is the one thing that money can’t buy? More time in life?

The answer to this question is presented through Lilith of the Adam organisation, the most prominent antagonist of this powerful group. This group is considered a terrorist organisation and declares, “We kill every chrono recipient until this dirty business stops.”

Max is married to Elli, portrayed by two actresses, Marlene Tanczik and Corinna Kirchhoff. They intend to become parents. Max seems to have no moral qualms about his job or the ruthless capitalism behind AEON. As a counterpoint, Elli’s father leads a simple life on the outskirts of the city and comments, “The poor are dying younger, and the old are getting rejuvenated.” A fire at Max and Elli’s home forces her to pay with 40 years of her life. Max is in a race against time, and it’s when the situation becomes personal that he becomes the number one enemy of AEON. The film stands out for the transformations of its characters. Max joins the Adam organisation, Elli reclaims her 40 years despite causing the loss of someone else’s youth, and Kaya, a loyal AEON employee, resigns from the company, stating that “life must end at some point.”

Why did this film attract so much attention from the public? Is the world it portrays truly dystopian? Who bears the consequences of the decisions made? Are platforms looking for comparable Glocal titles that can make a blast in the middle of a streaming wards summer? With our data, we bet they do.

1 PRIME VIDEO ENJOYED ONE OF ITS FINEST MONTHS

“The impact on the film market in Italy was relatively subdued, whereas the Spanish market experienced the most significant surge, registering a growth of nearly 10 percentage points.”

Netflix solidified its position in the movie sector, commanding an impressive 69% share, with its acquisition of animated titles like “Nimona” –garnered significant acclaim and attention due to Disney’s initial hesitation with the LGBTIQ+ angles. However, the rise of Spanish cinema on the streaming platform underscores the increasing appetite for local content, as evidenced by “Bird Box: Barcelona” and the sequel of “Through My Window”. But while Netflix reigns supreme in the movies arena, Disney+ has markedly surged in the show sector, grabbing a 31.3% share bolstered by popular titles like “Bluey”. This illustrates the importance of diversifying content offerings and the increasing challenge, even for giants like Netflix, to hold ground in a rapidly evolving content market.

2 EUROPEAN FLICKS TOOK UP 20% OF TOTAL STREAMS

European films accounted for a significant 20% of the total streaming activity, positioning European content as the second most frequently streamed production zone across all markets. This notable trend presents an exception in our reporting, suggesting that as Netflix tailors its content to suit multiple European markets with a glocal approach, the permeability of these productions is on the rise. Notable contributors to this achievement include movies such as “Paradise”, “Killer Book Club”, “A Man Called Otto”, “Squared Love Everlasting” and “Soulcatcher” amongst others.

3 THE QUEST FOR GLOCALIZED EUROPEAN ACTION FILMS

“For every three movies streamed, one is an Action flick on Netflix.”

4 SHOW MARKET IN FRANCE, ITALY AND GERMANY TAKE A SUMMER SLUMP

In the Italian OTT movie scene, Netflix solidifies its position, just like what’s happening in Italy and France, the German market took a bit of a hit this month. The Top 100 TV shows saw a considerable drop in accumulated streams in these three markets, and especially the German market, which lost almost 90M views. However, this trend was more or less expected. In the summer, it is common for streams to decline; you know, vacations, relaxation, pool time... It is quite normal that SVOD binge-watching for hours decreases during this time of year.

Action titles reign supreme on Netflix, accounting for a staggering one-third of the Top 100 viewership. For every three movies streamed, one is an Action flick on Netflix. In all analysed territories, Action films, particularly in English and particularly on Netflix, scored the best. Are streamers needing more Action European films to stuff their Action catalogues with a Glocal touch? “Paradise” ends up the month with almost 9M across all markets, “Soulcatcher” with 3.2M, “Valerian & the City of a Thousands Planets” with 1M amongst others.

“Through a carefully curated collection of Animation and Family-friendly content, Disney+ inches tantalisingly close to Amazon Prime Video’s performance metrics. Will we soon see Disney+ surpassing Prime Video’s performance?”

5 DISNEY+ VS. AMAZON PRIME VIDEO IN THE BATTLE FOR YOUNG STREAMERS IN THE UK

In British households, the mantra seems clear: when it comes to voracious streaming, kids reign supreme. Recognizing this trend, Disney+, the family entertainment titan, has masterfully tailored its library to serve this young audience. Through a carefully curated collection of Animation and Family-friendly content, Disney+ inches tantalisingly close to Amazon Prime Video’s performance metrics. Will we soon see Disney+ surpassing Prime Video’s performance?

6 SPANISH SHOWS LOWEST MARK

In August 2023, Spanish shows saw their lowest streaming share ever: 7%, as reported by our data. Dominating this percentage we observe “Un Cuento Perfecto” with 14M streams and “The Last Hours of Mario Biondo” with 5.8M, both produced for Netflix. This dip raises questions about whether it’s just a rough month or if early adopters like Spain face stiffer competition in the Netflix era.

7 DISNEY+ SETS AN UNPRECEDENTED RECORD IN ITALY

Since Disney’s entry into the Think Data reports, the landscape of OTT platforms has witnessed substantial changes. In each market, the introduction of Disney+ has either intensified competition or brought about different dynamics. In Italy, it has undoubtedly ushered in a much more competitive environment. Netflix’s market share drops to 50%, marking its lowest figure to date in the Italian market. Seizing the opportunity, Disney+ secures 44% of the streams. This shift is undoubtedly a significant milestone for Disney+, as it comes closest ever to challenging Netflix’s market position, a position Netflix has held since June 2021.

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BRIDGING THE DATA GAP

AUGUST 2023

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